



EASYBuyer Functional & Technical Specifications

EASYBuyer Functional and Technical Specifications*

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*Note: Remember that all the features and functions outlined in this specification are examples of best practices only. They are not 'what you are stuck with' because this entire application is built with EASYProcess™, K-Rise Systems' proprietary enterprise development platform. "Built with EASYProcess" means EASYBuyer will be implemented exactly the way your team thinks best for your company and it will grow with you like no other product on the market.

EASYProcess™ is redefining organic.

1. EASYBuyer Powered by EASYProcess

What is in this document?

- Hardware/ Software Requirements
- JDE Integration
- EASYBuyer Functional Features

Who should read this document?

- IT Department
- Procurement Department
- AP Department

2. Catalog

2.1. Stock Catalog

Stock Catalog

Stock catalogs are items that are already defined in the JDE Item Master.

Items can be added to the cart by their part number, description, uploaded from an excel spreadsheet or copied from excel.

Items can also be displayed using the JDE category codes such as SRP codes 1,2,3 etc.

2.2. Non-Stock Catalog

Non-Stock Catalog

These are the items that are not defined in the JDE Item Master.

Users can enter items and descriptions in a free form field.

Items can be received by quantity or by amount (ie. Water Supply, Electrical Services).

All non-stock orders are routed to a predefined procurement group to correctly specify items, prices and vendors details.

2.3. Punchout

Punchout

Any vendor supporting punchout can be added to EASYBuyer.

Contract pricing must already be set up with vendors. Items need to be configured in JDE using cross-reference. Pricing will come from vendor catalog.



Browse OfficeMax's website for your various office supply needs.
Pens, paper, toner, binders, etc. just a click away.



All your industrial supply needs.



Sharp is a electronics distributor, providing retail pricing for printers, computers, coffee machines.
Everything an office needs to be as productive as possible.



Sprint has a wide selection of routers, internal phone systems, and cell phones.
Make communicating to people across the country as simple as walking across the hall.

3. Requisition Creation

3.1. Order Header Info

3.1.1. Requisition

Requisition Info

- **Requisition Title:**

The first 30 characters of this field are sent to JDE.

- **Internal Comment:**

To be filled by the requestor. This comment is internal only and will not be displayed on the PO for vendor.

- **On Behalf Of:**

Someone creating a requisition on behalf of someone else. Ability to lookup employee. Functioning of "on behalf of" is explained in a separate chapter. EASYBuyer internally tracks who is doing any "on behalf of" transaction.

- **External Comment:**

This will be copied to the JDE PO as a comment and will be seen by the vendor.

01 - Requisition

Request Title - First 30 characters will be copied to the financial system (JDE)

On Behalf of

Requestor

Comments Internal:

Comments External Vendor/Warehouse:

3.1.2. Account Coding

Account Coding

- **Branch Plant:**

Branch Plant to be used for creating the PO. Real time lookup on F0006. Defaults come from the user's preferences.

- **Business Unit:**

Real time lookup on F0006. Defaults from user preference.

- **Account Code:**

Real time lookup on F0901. Defaults from user preference.

- **Subledger Type:**

UDC selector.

- **Subledger Number:**

Free form field. Validation logic based on subledger type.

02 - Account Coding

Branch Plant:

Business Unit / Capital Job:

Full Account Code:

Subledger Type: (if applicable)

Subledger Number: (if applicable)

3.1.3. Shipping

Shipping Info

- **Freight Code:**
UDC Selector based on 42/FR.
- **Ship To:**
Ship To location for PO. Real time lookup on F0101. Defaults from user preference.
- **Deliver To:**
A free form text field. Will go to PO as requested by. Defaults from user preference.
- **On Site Date:**
Date PO should be requested for. Will go to JDE as requested date.

☰ **03 - Shipping**

Freight Code <input type="text" value="02 Ground"/>	Deliver To: <input type="text" value="Requestor"/>
Ship To (Location) <input type="text" value="4242"/>	Required On-Site Date <input type="text" value="06/21/2011"/>

3.1.4. Attachment

Attachment

Ability to attach any number of files to the requisition. File could be of any type such as .xls, .doc, .txt etc. Attachments can go to JDE as PO attachment if desired.

Attachments

Browse File:

Existing Attachments

3.2.1. Order Details

Order Details

Requestors could edit items on this page.

In addition to quantity changes, adding items or removing items, they can also edit line level details for branch plant, business unit or account coding. These values default from header level unless overridden at the item level.

05 - Order Detail

121945 EASY Buyer

Item Number	UnitPrice	UOM	Quantity	Ext. Price	Description
<input type="checkbox"/> 210	530.1000	EA	<input type="text" value="4"/>	2,120.40	100 FT Copper Wire
<input type="checkbox"/> 1001	26.8950	EA	<input type="text" value="10"/>	268.95	10 FT Cable

Total: \$2,389.35

BranchPlant D30 **Business Unit** **GL Account**
Subledger Type **Sublumber**

3.2.2. Approval Flow

Approval Flow

Requestor can review the approval flow for this order.

06 - Approver Flow

Approver Flow

Approver	Approval Type	Routing Sequence	Status
Requestor (Requestor)	Requester	1	10 - Submitted
Manager, John (Manager)	Supervisor	2	10 - Submitted
CIO, John (CIO)	Supervisor	3	10 - Submitted

4. Requisition Approval

Approval Notification

Managers/supervisors in the approval flow get notifications via email. These email notifications can contain one-click login links to the portal if desired.

Managers can directly login to the portal and look for requisitions waiting in their approval queue.

Clicking on the requisition takes them to the 'Requisition Approval' page.

Pending Requests

ID	Title	Request Type	Date Submitted	Status	Total \$
ODR-10006519	Catalog Order	Catalog	06/21/2011	10 - Submitted	\$1,167.78
ODR-10006518	Non Catalog	NonCatalog	06/16/2011	10 - Submitted	\$375.00
ODR-10006475	Laptop and Supplies	Catalog	05/17/2011	10 - Submitted	\$730.10
ODR-10006467	Demographic Consulting	Catalog	05/16/2011	10 - Submitted	\$827.76

<< < > >> Total record found: 4. Displaying record 1 to 4.

Requisition Approval

Approver can see all the details of the requisition including items, account coding, shipping, attachments etc. This requisition can not be changed from this point onwards.

Approver can enter comments while approving and also attach additional documents to the requisition.

Approver can see his/her lower level approvers, the time they approved the requisition and the comments they entered.

Request Information

Approval Comments

CIQ Approved!

Action By	Comment	Date/Time	Action
Manager(Manager, John)	Manager approved!	2011/06/21 09:21:33	Approve

<< < > >> Total record found: 1. Displaying record 1 to 1.

5. Procurement Non-Stock Edit

Non-Stock Orders

EASYBuyer allows users to create non-stock orders by typing free form item numbers, descriptions, quantities and price. Such requisitions, once submitted, get routed to a predefined 'procurement group' for review who can then edit any detail on the requisition.

Non-stock orders can be setup for approval by managers/supervisors before being forwarded to the procurement group; or they can be reviewed by the procurement group before being submitted to operations for approval.

Procurement Logistics Non Cat Edits

Freight Code (ACP Orders Only)

Ship To (Location)

Deliver To:
 *

Required On-Site Date

Update Shipping

Order Detail Non-Catalog

Update Vendor

Item Number	UnitPrice	Quantity	Ext. Price	Description	Account	SubType	SubNumber
<input type="checkbox"/> IT Services	160	80	12,800.00	IT Services	1620.8192.04040020		
<input type="checkbox"/> Computer Pai	5	200	1,000.00	Monitors	1620.8192.04040020		

Total:
13,800.00

BranchPlant

Business Unit

Subledger Type

Update

Delete Selected

Copy Selected

Update Branch Plant Add Items

GL Account
 Set account information to requisition header.

Sublumber

Set Selected Accounts

6. Inquires and Lookups

6.1. Requisition

Requisition Search

Allows a user to look for a requisition based on requisition number, amount, PO number or vendor number.

Clicking on a requisition directs the user to its details where they can verify the status; if it is waiting for any approvals, etc.

Searches can be filtered so that they display the requisitions that belong to the currently logged in user only.

Search Requisitions

Employee Look Up

Search by Options: **Keyword:**

Date: **Date From:** **Date To:**

RequestId	Status	Date Submitted	Requester	RequestTitle	Amount	PO Order Number	DocType	Vendor Name
ODR-10006520	05 - Saved	06/21/2011	Requestor	Catalog Order	2,389.35			EASY Buyer
ODR-10006519	10 - Submitted	06/21/2011	Requestor	Catalog Order	1,167.78			EASY Buyer
ODR-10006518	10 - Submitted	06/16/2011	Requestor	Non Catalog	375.00			Appliance Sales and Service
ODR-10006516	15 - Approved	06/15/2011	Requestor	NFL title	911,000.00	772	OP	Appliance Sales and Service
ODR-10006515	05 - Saved	06/15/2011	Requestor	CopyFOX NFL	9,300,000.00			Appliance Sales and Service
ODR-10006513	15 - Approved	06/15/2011	Requestor	Test req 1235	270.00	771	OP	Appliance Sales and Service
ODR-10006512	15 - Approved	06/15/2011	Manager	Camera Equipments	561.84	770	OP	EASY Buyer
ODR-10006511	15 - Approved	06/15/2011	Requestor	test	557.00	769	OP	EASY Buyer
ODR-10006510	20 - Denied	06/13/2011	Manager	Fox & Friends BBQ	65,000.00			Appliance Sales and Service
ODR-10006509	15 - Approved	06/09/2011	Requestor	mobile test Title	2,689.50	768	OP	EASY Buyer

6.2. JDE PO

Purchase Order Search

This is a real time search on JDE PO.

The results also show EASYBuyer requisition number as it is linked with JDE PO.

Clicking on the requisition number link will display further details.

Search Purchase Orders

[Employee Look Up](#)

Search by Option:

Requisition Number

Keyword:

Date: Order Date

Date From:

Date To:

Requisition Number	PO Number	Vendor Number	Order Date	Request Title	Amount
PR10006455	749	4319	5/5/2011	Catalog Purchase	531,319.80
PR10006456	750	4319	5/5/2011	Punchout Items	202.05
PR10006458	751	4319	5/6/2011	Title one	5,187.46
PR10006459	752	4319	5/12/2011	test requisition	321.00
PR10006460	753	4319	5/13/2011	Test requisition1	32.10
PR10006463	744	4319	5/2/2011	mpleSharepoint Exa	609.90
PR10006464	745	4319	5/2/2011	Sharepoint Example	3,210.00
PR10006468	746	4319	5/2/2011	Non-Catalog	60.00
PR10006472	747	4319	5/2/2011	High Level Catalog Order	1,140.00
PR10006474	748	4319	5/3/2011	Kinross	3,260.40

<< < > >> Total record found: 180. Displaying record 171 to 180.

6.3. Receipt

Receipt Search

Real time JDE lookup on receipts.

Search Receipts

Search by Option: Keyword:

Date: Date From: Date To:

Purchase Order Number	Vendor Name	PO Doc Type	PO Line Number	Receipt Number	Date Received	Quantity Ordered	Quantity Received	Amount Ordered	Amount Received	Match Type
No record found.										

6.4. Vouchers

Voucher Search

Real time JDE lookup of vouchers.

Search Vouchers

Search by Option: Keyword:

Date: Date From: Date To:

Purchase Order Number	Vendor Name	PO Doc Type	PO Line Number	Voucher Number	Date Vouchered	Quantity Ordered	Quantity Vouchered	Amount Ordered	Amount Vouchered
No record found.									

6.5. Account Code

Account Code Search

Real time lookup on account code (F0901).

Results can be filtered based on business unit, object #, account name, business unit name or subsidiary.

Account Code Lookup

Object #:	<input type="text"/>	Account Name:	<input type="text" value="Recognized"/>
Business Unit:	<input type="text" value="1620"/>	BU Name/Desc:	<input type="text"/>
Subsidiary:	<input type="text"/>	<input type="button" value="Find"/>	

Account Code	Account Name	Business Unit	BU Name/Desc
6380	WMP Offset-Recognized Costs	1620	Birmingham Steel - Memphis
1392	WMP Offset-Recognized Costs	1620	Birmingham Steel - Memphis
1392	Recognized Costs	1620	Birmingham Steel - Memphis
1391	Recognized Revenue	1620	Birmingham Steel - Memphis

<< < > >> **Total record found: 4. Displaying record 1 to 4.**

6.6. Vendors


Vendor search

A real time vendor lookup (F0101).

Filter on name, address number, state, address line or city.

Vendor Lookup

Search by Option:

Vendor Name 

Keyword:

Search

Address Number	Vendor Name	Address	City	State	Zip
3480	Digger Enterprises	5 River Road	Sacramento	CA	94203
4001	Farhad Gemeinschaft	47 C Osterbekstrasse	Hamburg		22083
4002	Aluminium de Rhone	563 Rue de Lisbonne	Lyon		69215
4003	Alpine Industries	400 42nd Avenue	Calgary	AB	T2G-1Y4
4100	Total Solutions	One Technology Way	Denver	CO	80237
4207	Western Securities	234 5th Ave.	New York	NY	10019
4215	United Investments	143 Cambridge Circle	Boston	MA	02982
4302	Javier Allende	Sabattini 31	Cruz del Eje		5280
4317	Appliance Parts and Supply	1432 Emory Avenue	Omaha	NE	58645
4318	Appliance Pro	5890 Main Street	Atlanta	GA	23556

<< < > >> Total record found: 113. Displaying record 1 to 10.

7. Approval Hierarchy

Source of Approval Hierarchy

EASYBuyer can use various sources for approval hierarchy:

- Active Directory
- JD Edwards
- HR systems like PeopleSoft
- EASYBuyer built in approval hierarchy

Requisition Approval Hierarchy

EASYBuyer downloads the approval hierarchy tree from your hierarchy source and stores it at the requisition level. This hierarchy stays with the requisition until it gets approved.

Because the approval hierarchy is stored, it can be modified:

- Adding new approver(s) at any level in the hierarchy.
- Removing any approver(s) from the hierarchy.
- Adding new watchers at any level in the hierarchy.

All these features can be restricted based on user types and roles.

8. User Preference

User Preferences

- Branch Plant

Realtime JDE lookup and validation.

- Business Unit

Realtime JDE lookup and validation.

- Account

Realtime JDE lookup and validation.

- Ship To

Lookup and Validated from JDE.

- Deliver To

Free form text field.

User Preferences

Select the accounting and shipping information to use as defaults in your requests. You can change the default for a specific request, by selecting a different value when you create the request.

Branch Plant

Business Unit

Account

Ship To

Deliver To

9. Delegation

Delegation

Users can delegate the approval to a particular employee while they are away or on vacation using the employee lookup tool. This can be setup based on date ranges.

Procurement Logistics Non Cat Edits

Freight Code (ACP Orders Only)

Ship To (Location)

Deliver To:
 *

Required On-Site Date

Update Shipping

Order Detail Non-Catalog

Update Vendor

Item Number	UnitPrice	Quantity	Ext. Price	Description	Account	SubType	SubNumber
<input type="checkbox"/> IT Services	160	80	12,800.00	IT Services	1620.8192.04040020		
<input type="checkbox"/> Computer Pai	5	200	1,000.00	Monitors	1620.8192.04040020		

Total:
13,800.00

BranchPlant

Business Unit

Subledger Type

Update

Delete Selected

Copy Selected

Update Branch Plant [Add Items](#)

GL Account
 Set account information to requisition header.

Subllumber

Set Selected Accounts

10. On Behalf Of

On Behalf Of

"On Behalf Of" allows a user to create a requisition on behalf of someone else. Requisition gets created with the approval flow of the user specified in 'On Behalf of' field.

While filling out requisition header information in EASYBuyer, users have the ability to lookup employees and select someone else in 'On Behalf Of' field. By default "On Behalf Of" equals self.

"On Behalf Of" users get added to the requisition approval flow as 'Watchers'. This allows them to receive every email that requestor would receive and also lists them in their watch queue in the portal.

The screenshot shows a requisition form titled "01 - Requisition". The "Request Title" field contains the text "Request Title - First 30 characters will be copied to the financial system (JDE)". The "On Behalf of" dropdown menu is set to "CIO, John". A red callout box with a red border and a red arrow pointing to the dropdown menu contains the text "This requisition is created on behalf of CIO." The "Comments Internal:" field is empty, and the "Comments External Vendor/Warehouse:" field is also empty.

11. Watcher

Watcher

A watcher is a user in the approval hierarchy at a certain level just like any other user. Watchers can not approve the requisition, however, they receive all the emails that a requestor receives and can view the requisitions anytime via the watcher queue in the portal.

A watcher can be added manually by any authorized user in an existing approval hierarchy for that requisition.

If a requestor creates a requisition "On Behalf Of" another user, EASYBuyer automatically adds the "On Behalf Of" user as a watcher to the hierarchy. This allows "On Behalf Of" user to receive every notification on the requisition that requestor would receive.

12. JDE Integration

Business Function (BSFN) Integration

EASYBuyer calls JD Edwards BSFN using the XML Interoperability.

All transactions are done using your BSFNs the way they are currently implemented in your system ensuring that your business logic is enforced.



Master Files Integration

EASYBuyer also uses direct database queries to get data from JDE.

To connect to the JDE database, ODBC, OleDb, .NET Native drivers can be used.

EASYBuyer can also use JDE ODA driver to enforce JDE row and column level security if needed.



PO Integration

The following business functions are called to integrate with JDE PO.

- F4311FSBeginDoc
- F4311EditLine
- F4311EditDoc
- F4311EndDoc

Receipt Integration

The following business functions are called for receipt transaction:

- F4312BeginDoc
- F4312EditLine
- F4312EditDoc
- F4312EndDoc

Matching Integration

The following business functions are called to integrate with JDE 2-way and 3-way matching:

- F4314BeginDoc
- F4314EditLine
- F4314EditDoc
- F4314EndDoc

13. Hardware/Software Recommendations

EASYBuyer Hardware/Software Recommendations

Hardware/Software Recommendations:

Operating System: Windows 2003/2008 server 32/64 bit, .NET Framework 2.0.

Architecture: 32/64bit

- **Production Server**

- 1 CPU, 4 GB RAM, 80 GB HDD (30GB for OS, 50GB for Applications)
- Processor: Intel Dual/Quad Core 2.5 GHz or better

- **Production SQL Server**

- 1 SQL Server, 1 CPU, 4 GB RAM, 80 GB HDD (30GB for OS, 50GB for Applications)

Note: EASYProcess can leverage your current SQL Installation.

- **Development Server**

- 1 CPU, 1 GB RAM, 80 GB HDD (30GB for OS, 50GB for Applications)
- Processor: Intel Dual/Quad Core 2.5 GHz or better

Note: May reside on an already existing server.

- **Development SQL Server**

- 1 CPU, 4 GB RAM, 80 GB HDD (30GB for OS, 50GB for Applications)

Note: EASYProcess can leverage your current SQL Installation.

IIS 6.0/7.0

- Included with Windows 2003/2008 Server

Client/Workstation

- Windows XP or Windows7, .NET Framework 2.0, IIS (5.0 or 6.0 or 7.0)
- Microsoft SQL Server Express 2005/2008

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