

ESO Admin Level Setup

Re-Seed

The default initial primary key value for clients and users is not sufficiently large enough to avoid conclusions with history data, therefore higher initial values (10,000,001) will be seeded.

In the Data Extraction and loading package, navigate to the Base Configuration folder, then navigate to the ReSeed folder. In SQL Server management studio open a query window and select the database appropriate for the Base Configuration. Open the file “ReSeed Before Base Configuration.sql” and execute it.

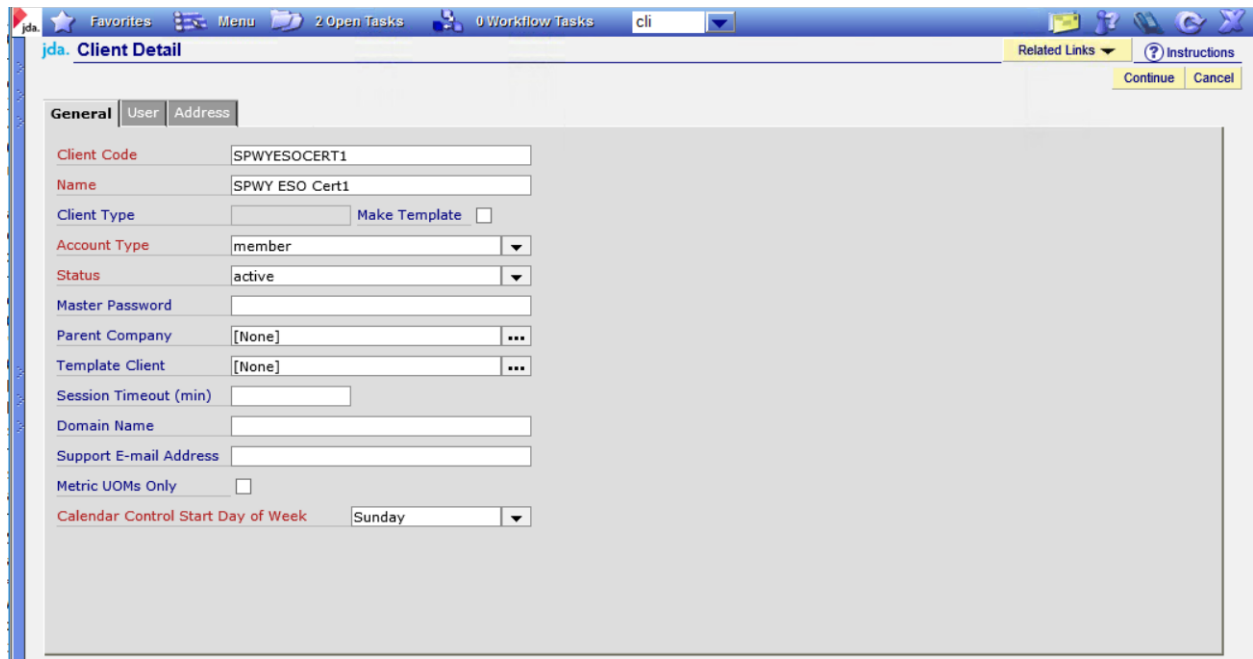
Note: the reseed script only sets values into a temporary cache. In order to preempt the purging of the cache, the configuration steps for Client Setup listed below should be done immediately after the execution of the reseed script. If for some reason this cannot be done, the reseed script can be executed again prior to the configuration steps. The steps proceeding Client Setup can be defer until later.

Client Setup

Login to the ESO Instance the “Waveadmin” credentials:

In the top search dialog enter Client Setup, click on the Client Setup link to access the Client Setup.

From the Client browse page, Click Add Client. The following dialog will be displayed.

The screenshot shows a web application window titled "jda. Client Detail". The window has a top navigation bar with "Favorites", "Menu", "2 Open Tasks", and "0 Workflow Tasks". Below the navigation bar, there are tabs for "General", "User", and "Address", with "General" being the active tab. The form contains several fields: "Client Code" (text input with value "SPWYESOCERT1"), "Name" (text input with value "SPWY ESO Cert1"), "Client Type" (text input with a "Make Template" checkbox), "Account Type" (dropdown menu with value "member"), "Status" (dropdown menu with value "active"), "Master Password" (text input), "Parent Company" (text input with value "[None]"), "Template Client" (text input with value "[None]"), "Session Timeout (min)" (text input), "Domain Name" (text input), "Support E-mail Address" (text input), "Metric UOMs Only" (checkbox), and "Calendar Control Start Day of Week" (dropdown menu with value "Sunday"). There are "Continue" and "Cancel" buttons at the bottom right of the form.

Add values for the Client Code and Client Name.

All the remaining values should be left as default (They can be changed later).

Click the User tab.

The screenshot shows a web browser window with the title bar 'jda. Client Detail'. The browser's address bar shows 'cli'. The page has a blue header with 'jda. Client Detail' and a 'Related Links' dropdown. Below the header, there are three tabs: 'General', 'User', and 'Address'. The 'User' tab is selected. The form contains the following fields:

- First Name: C
- Middle Name: (empty)
- Last Name: Admin
- Suffix: (empty)
- Language: English (dropdown menu)
- New Password: (masked with dots)
- Confirm Password: (empty)
- Force password change on next login: (checkbox, unchecked)

At the bottom right of the form, there are 'Continue' and 'Cancel' buttons.

Enter information in the following fields:

- First Name
- Last Name
- Language
- Password fields

This will create a Client Admin user based upon the First and Last Name. In the above example, the user will be created with the login of CAdmin.

Click the Address tab.

Client Detail

General User **Address**

Address Line 1: 500 Speedway Dr

Address Line 2:

City: Enon

State: Ohio

Postal Code: 45323

Country: United States

EDI Number:

Continue Cancel

Click Continue. A confirmation message is displayed.

Enter information in the following fields:

- Address Line 1
- City
- State
- Postal Code
- Country

Click Continue.

Note the user name assigned on the message box and click OK.

Click the Language tab and choose a default language.

Client Detail

General Address Service Groups Services **Language** Activity

Default Language: English

Authorized Languages

	Name
<input checked="" type="checkbox"/>	English

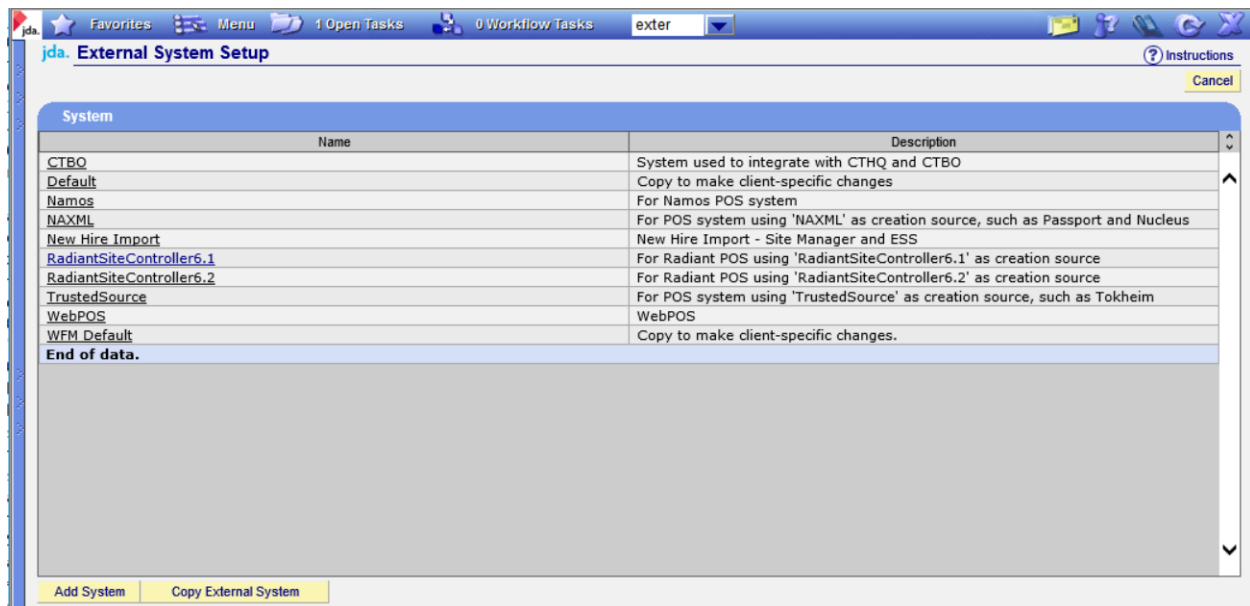
Save & Close Cancel

*** Need to add screen shot to capture the internal client id value.

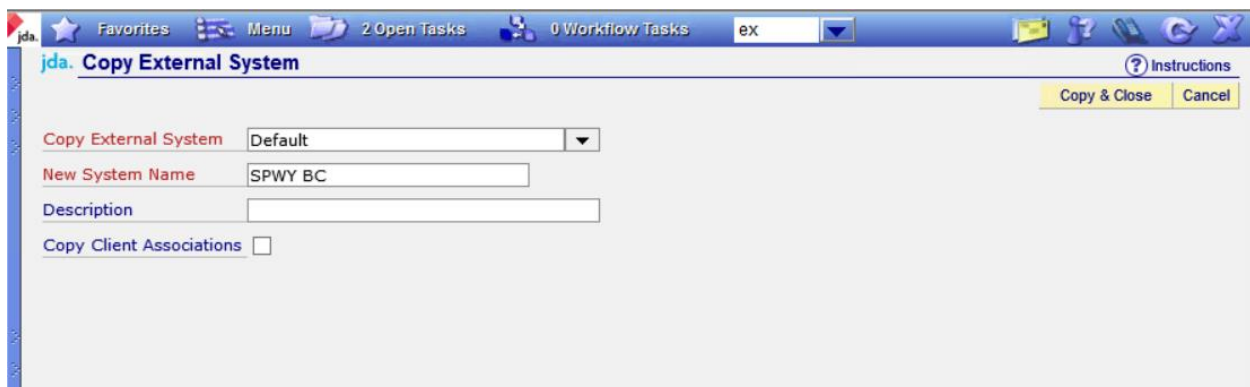
Click Save & Close.

External System Setup

In the top search dialog enter External System Setup, click on the External System Setup link to access the External System Setup.



Click Copy External System



Select "Default" as the Copy External System.

Enter a New System Name of SPWY BC, to indicate that the this import source is from the legacy BlueCube system.

Click Copy & Close.

The new system should be displayed in the browse grid.

System

Name	Description
CTBO	System used to integrate with CTHQ and CTBO
Default	Copy to make client-specific changes
Namos	For Namos POS system
NAXML	For POS system using 'NAXML' as creation source, such as Passport and Nucleus
New Hire Import	New Hire Import - Site Manager and ESS
RadiantSiteController6.1	For Radiant POS using 'RadiantSiteController6.1' as creation source
RadiantSiteController6.2	For Radiant POS using 'RadiantSiteController6.2' as creation source
SPWY BC	
TrustedSource	For POS system using 'TrustedSource' as creation source, such as Tokheim
WebPOS	WebPOS
WFM Default	Copy to make client-specific changes.
End of data.	

Buttons: Add System, Copy External System

Click on the link for SPWY BC. Ensure that the Org Unit/ BU Group Entity has the key set to “Org Code”.

Edit System - SPWY BC

Name: SPWY BC Description:

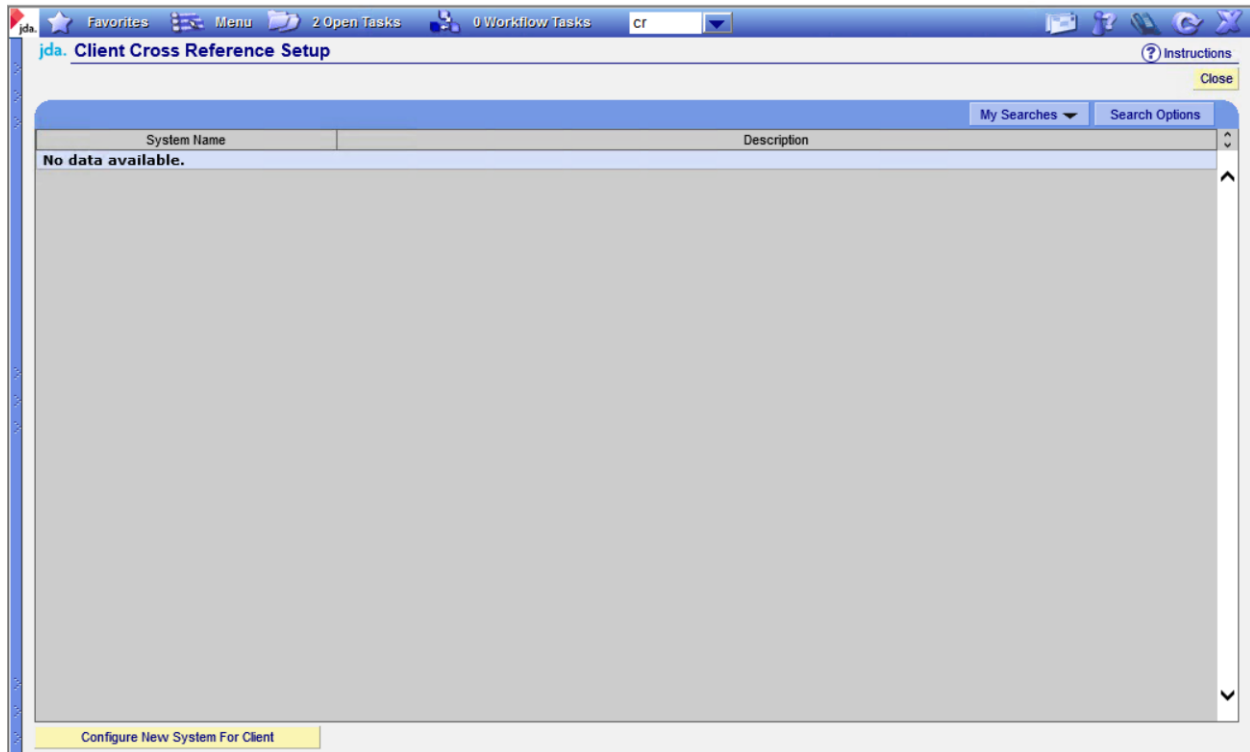
Buttons: Delete, Save & Close, Cancel

Display Name	Key Name
Method of Payment	
Method of Payment Type	
Metric	
Metric Group	
Minor Rule	
Org Hierarchy Level	name
Org Unit / BU Group	Org Code
Pay Adjustment	
Pay Policy	
Pay Tier	
POS Loyalty Scheme Config	
Punch Evaluation Rule	
Punch Rule Group	

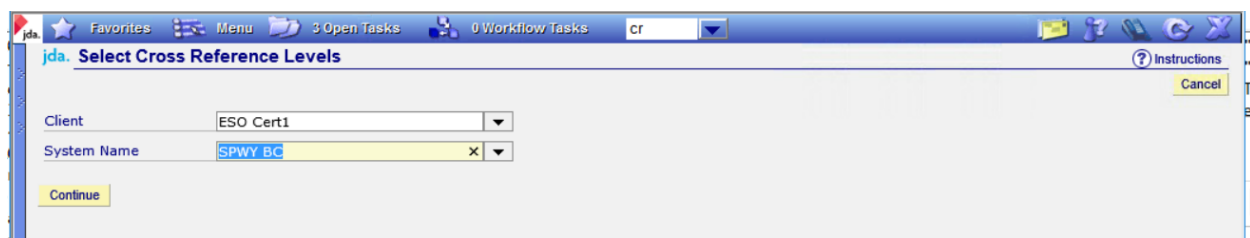
If the key is not set to “Org Code”, change the value to “Org Code” and click Save and Close.

Cross Reference Client Setup

In the top search dialog enter Cross Reference, click on the Cross Reference Client Setup link to access the Cross Reference Client Setup.



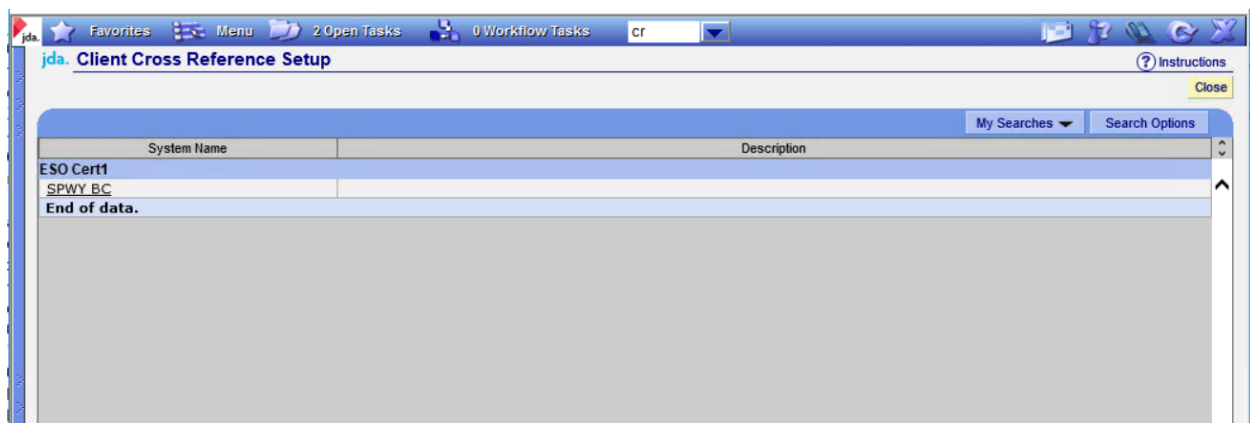
Click Configure New System for Client



Select the Client Name and the External System Name created previously.

Click Continue.

The Client Name and the External System should be displayed in the browse page.



Click on the Name of the System to display the Cross Reference Levels.

jda. Select Cross Reference Levels

Client: SPWY
System Name: SPWY BC

Entity Name	Key Name	Level
Address	BU Code	Client
Business Unit Operator	operator_identifier	Client
Employee	employee_id	Client
Item	External Number	Client
Language	Name	Client
Manufacturer	Manufacturer Number	Client
Org Hierarchy Level	name	Client
Org Unit / BU Group	Org Code	Client
Receiving Delivery Number	Delivery Number	Client
Sales Destination	Sales Destination ID	Client
Sales Item	External Number	Client
Security Role	name	Client
Supplier	External Number	Client
Supplier Item	Supplier Item Product Code	Client
Tax Code	Retail Tax Type ID	Client
Workday Profile	name	Client
End of data.		

Ensure that all “Levels” are set to “Client”.

Ensure that each Entity Name is listed based upon the example above.

Admin level setup is complete, the browser session should be closed.

Client Admin Level Setup

Default Services

This step requires write access to the ESO database.

In the Data Extraction and loading package, navigate to the Base Configuration folder, then navigate to the Default Services folder. In SQL Server management studio open a query window and select the database appropriate for the Base Configuration. Open the file “Add Default Services.sql” and execute it.

Workday Profile Setup

In the top search dialog enter Workday Profile, click on the Workday Profile Setup link to access the Workday Profile Setup

jda. Add New Profile

Profile Name: Workday Profile Default 24 hrs
Owner: ESO Cert1

Continue

Add a new profile named “Workday Profile Default 24 hrs”.

Click Continue.

jda. Add New Profile

Profile Name: Workday Profile Default 24 hrs

Owner: ESO Cert1

Default | Monday | Tuesday | Wednesday | Thursday | Friday | Saturday | Sunday | Overrides

24 hours ☐

Open Time: Close Time:

Day Parts

Day Part Name	Start Time	End Time	Delete
No data available.			

Choose Day Parts | Move Up | Move Down

It is not necessary to complete the remainder of the configuration.

Click save and close.

Organization Hierarchy Level Setup

In the top search dialog enter Hierarchy Level Setup. Click on the link.

jda. Hierarchy Level Setup

Organization Levels

Org Unit	Org Unit Count
Enterprise	1
Division	0
Region	0
District	0
BU	2834

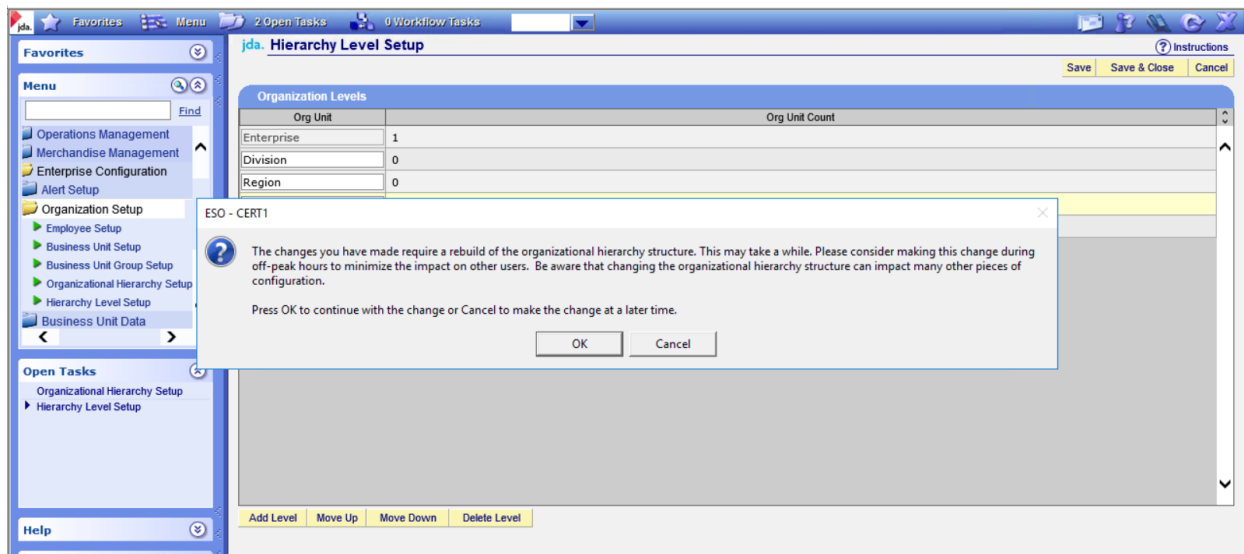
Add Level | Move Up | Move Down | Delete Level

Click Add Level and add “Division” under “Enterprise”.

Click Add Level and add “Region” under “Division”.

Click Add Level and add “District” under “Region”.

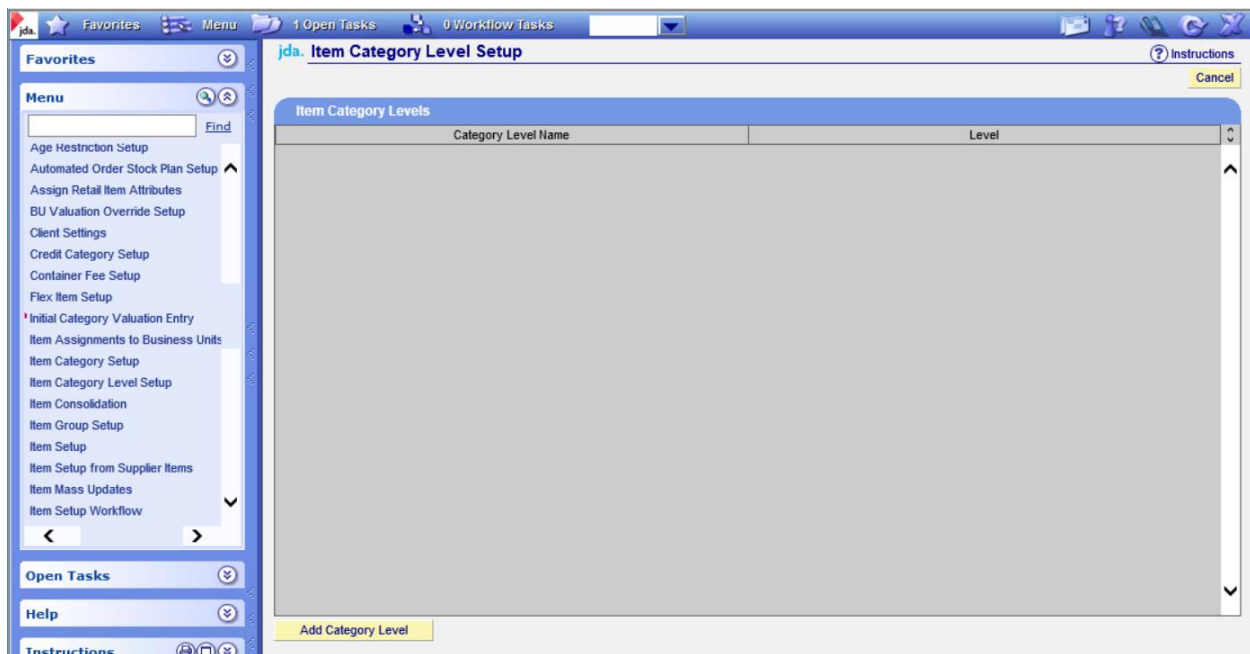
Click Save and Close. A warning message will be displayed.



Click Ok on the warning dialog.

Item Category Level Setup

In the top search dialog enter Item Category Level Setup. Click on the link.



Click Add Category Level to display the New Item Category Level page.

jda. New Item Category Level

Category Level Name: Department

Description:

Parent Category Level: [None]

Buttons: Save & Close, Cancel

Enter the “Department” level without a parent category level.

Click Save and Close.

Add another category level for “Category” using the “Department” as the Parent Category Level.

Add another category level for “Subcategory” using the “Category” as the Parent Category Level.

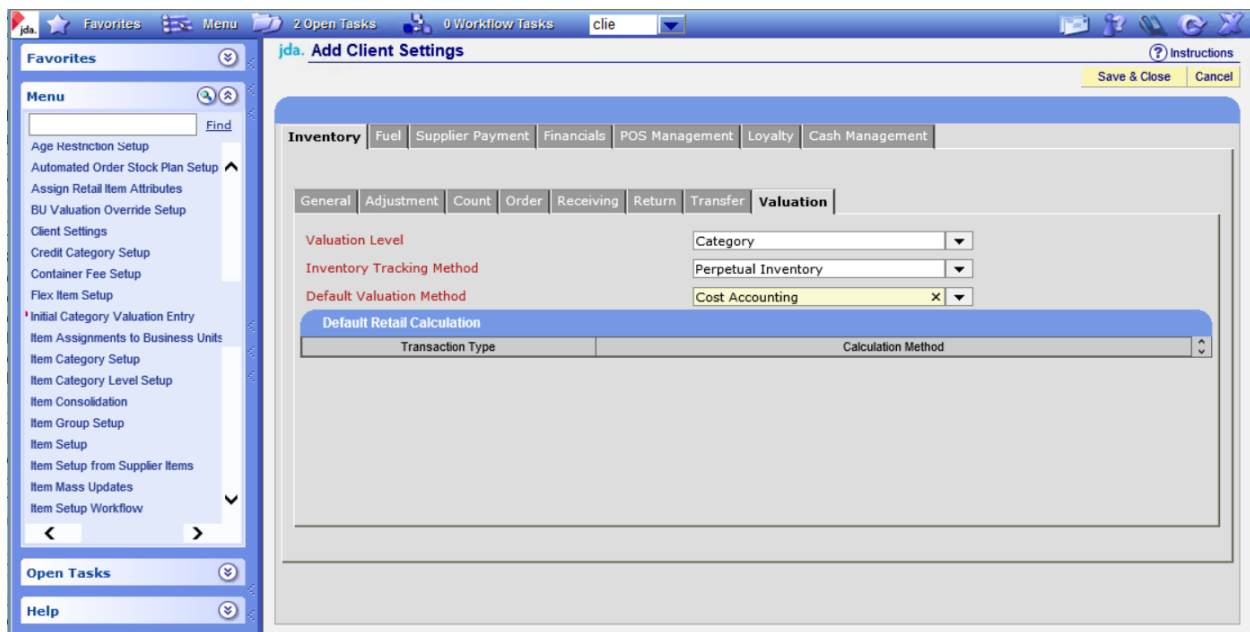
When completed, the browse screen should look as shown below.

jda. Item Category Level Setup

Category Level Name	Level
Department	1
Category	2
SubCategory	3

Client Settings

In the top search dialog enter Item Client Settings. Click on the link.



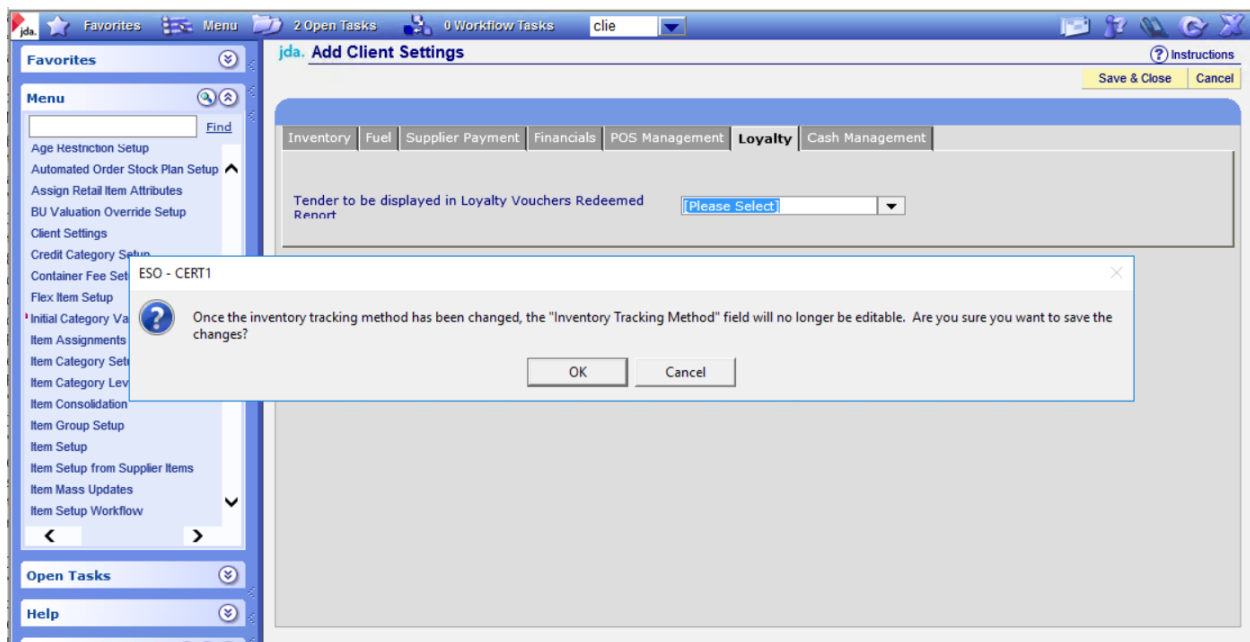
Navigate to the inventory tab.

Set the Valuation Level to "Category".

Set the Inventory Tracking Method to "Perpetual Inventory".

Set the Default Valuation Method to "Cost Accounting".

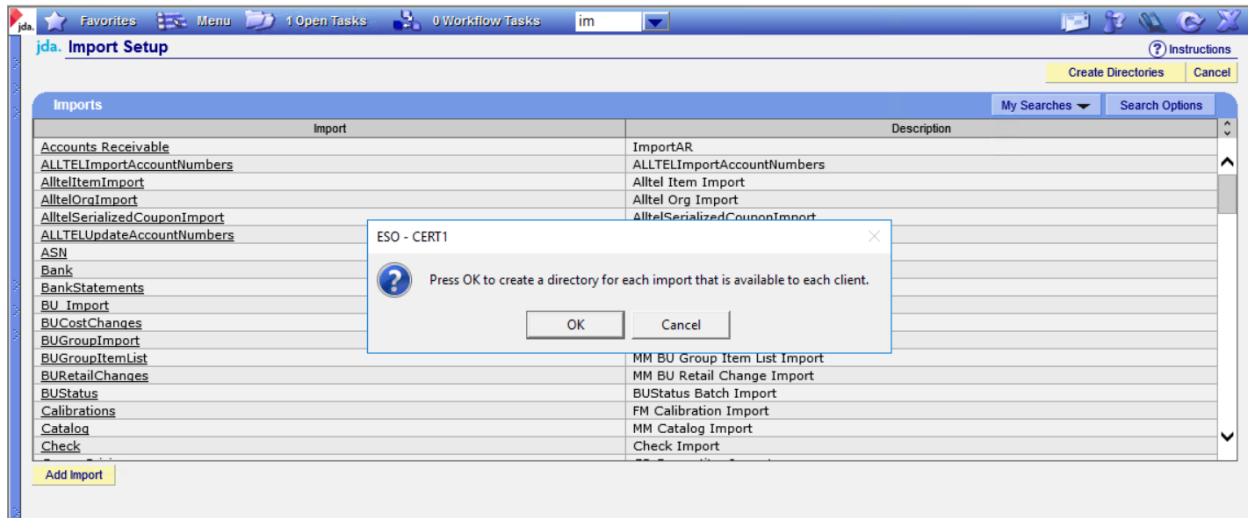
Click Save and Close. A warning message will be displayed. Click Ok.



Save and close the Client Settings

Import Setup and Testing

In the top search dialog enter Import Setup.

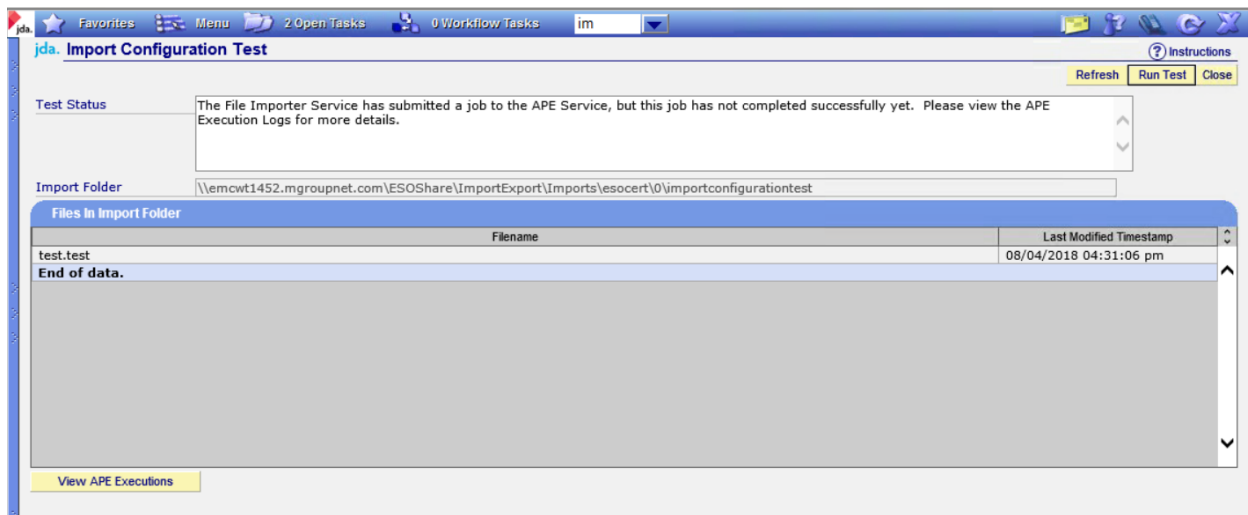


Click Create Directories.

Click OK and the dialog.

Click cancel when the operator is complete in order to close the page.

In the top search dialog enter Import Configuration Test.



Click Run Test.

A message will be displayed if the test job was submitted successfully.

Click Close to exit the page.

In the top search dialog, entered "Queued Job Viewer". Click on the link to display the APE Execution Jogs Queue.

The screenshot shows the 'APE Execution Jobs Queue' window. At the top, there's a toolbar with 'Favorites', 'Menu', '3 Open Tasks', and '0 Workflow Tasks'. Below the toolbar, the title bar says 'jda. APE Execution Jobs Queue'. On the right, there are 'Refresh' and 'Cancel' buttons. The main area is titled 'Jobs In Queue' and contains a 'Search Options' section. The search options include:

- Moniker contains: [Text input field]
- Type: [Show All] dropdown
- Status: Finished (completed, exceptioned, or failed) dropdown
- Segment: [Show All] dropdown
- Queued After: [Calendar icon] [Text input field]
- Queued Before: [Calendar icon] [Text input field]
- Org Unit: [Show All] dropdown
- Top Level Jobs only: ☒

 On the right side of the search options, there are 'My Searches', 'Reset', and 'View Results' buttons.

Set the search criteria as above and Click View Results.

Near the top there should be a job titled APE.Jobs.ImportRouter.

The screenshot shows the 'APE Execution Jobs Queue' window with a list of jobs. The table has columns: Moniker, Type, Status, Segment, Org Unit, Run On, Owner, and Time Queued. The first job is 'APE.Jobs.ImportRouter' with status 'Completed'.

Moniker	Type	Status	Segment	Org Unit	Run On	Owner	Time Queued
APE.Jobs.ImportRouter	Concurrent Job	Completed	Default		EMCWT1430		08/04/2018 04:31:07 pm
applications.inventory.apex.jobs.SCM_IM_Process_Transactions	Concurrent Job	Completed	Default		EMCWT1431		08/04/2018 04:30:00 pm
Applications.PerfMgmt.Threshold.APE.ValidateJob	Sequential Job	Completed	Default		EMCWT1431		08/04/2018 04:30:00 pm
applications.framework.apex.jobs.DM_Scheduled_Job	Sequential Job	Completed	Default		EMCWT1431		08/04/2018 04:30:00 pm
applications.framework.apex.jobs.DM_Scheduled_Job	Sequential Job	Completed	Default		EMCWT1430		08/04/2018 04:30:00 pm
applications.framework.apex.jobs.DM_Scheduled_Job	Sequential Job	Completed	Default		EMCWT1430		08/04/2018 04:15:00 pm
applications.inventory.apex.jobs.SCM_IM_Process_Transactions	Concurrent Job	Completed	Default		EMCWT1431		08/04/2018 04:15:00 pm

Click on the moniker link and navigate to the Task tab to display the job tasks.

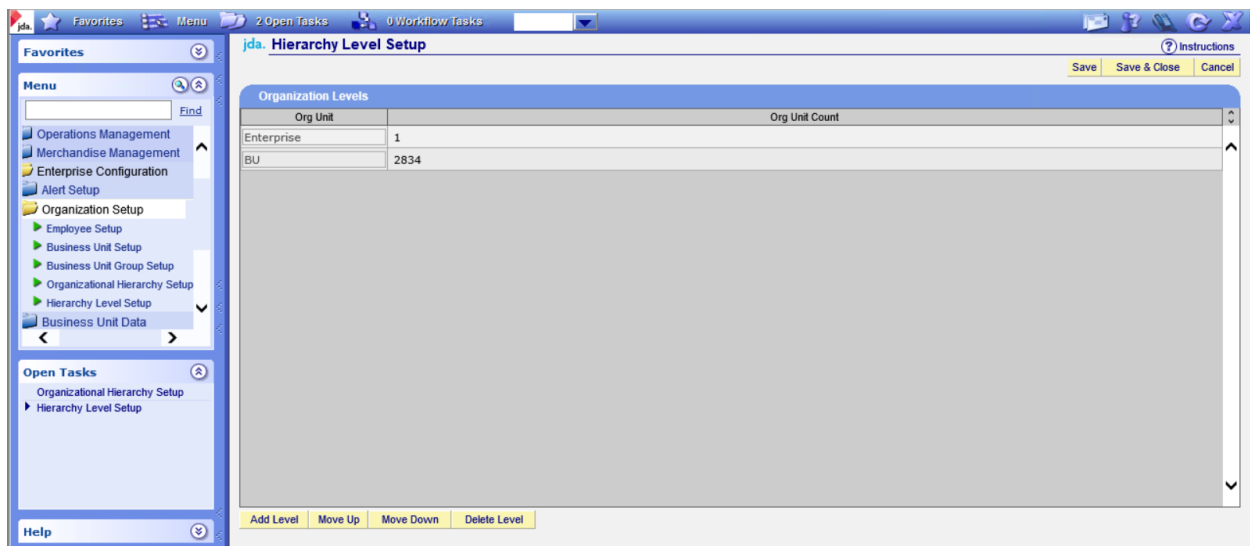
The screenshot shows the 'APE Job Execution' window for job {8BADFE4F-2598-E811-A2DE-005056977F2B}. The 'Tasks' tab is selected. The table has columns: Moniker, Type, Status, Segment, Run On, Sequence, and Queued Time. The first task is 'APE.Tasks.ImportRouter' with status 'Completed'.

Moniker	Type	Status	Segment	Run On	Sequence	Queued Time
APE.Tasks.ImportRouter	Concurrent Task	Completed	Default	EMCWT1430		08/04/2018 04:31:14 pm
Platform.Import.ImportConfigurationTestJob	Sequential Job	Completed	Default	EMCWT1430		08/04/2018 04:31:14 pm
End of data.						

Verify that the task completed without error.

Click Cancel to close the page.

Click Cancel again to close the Queued Job Viewer.



Additional Database Scripts

Bump up pre-defined Date tables

In the TimeZone_2016 database upgrade package provided by JDA, navigate to the Generic.AddYearsToTimeTable folder. This directory will contain a script runner package.

Open the SQL file 100_Generic.AddYearsToTimeTable.sql and alter the following statement near the top of the SQL.

```
select @today = getdate(), @target_year = datepart(yy, getdate()) + 5
```

Change it to:

```
select @today = getdate(), @target_year = datepart(yy, getdate()) + 10
```

Run the ScriptRunnerV2c execute, set the appropriate parameters for the database connection, and execute the run the package.

When completed check the out files for errors.

Latest JDA Time Zone patches

In the TimeZone_2016 database upgrade packaged provided by JDA, navigate to the TimeZone_2016 folder, then navigate to the TimeZone_2016_v2 folder. This directory will contain a script runner package.

Run the ScriptRunnerV2c execute, set the appropriate parameters for the database connection, and execute the run the package.

When completed check the out files for errors.

Missing Time Zone Definitions

In the Data Extraction and loading package, navigate to the Base Configuration folder, then navigate to the Missing Time Zone Definitions folder. In SQL Server management studio open a query window and

select the database appropriate for the Base Configuration. Open the file “Add Time Zone Definitions.sql” and execute it.

POS Options

Within the data extraction and loading package, Base Configuration, POS Options folder there will be 4 SQL Scripts:

Step 1 - POS Option Group.sql

Step 2 - New POS Options.sql

Step 3 - POS Option Group List.sql

Step 4 - POS Option Template.sql

Open an instance of SQL Server Management Studio and then open a new query window. Set the database to the main BC/ESO database. Execute each of the 4 scripts in order.

Ensure that no errors are encountered and that data was inserted into the following tables:

POS Options with appropriate client id.

POS Option Group with appropriate client id.

POS Option Group List with appropriate client id.

POS Option Template with appropriate client id.

POS Option Template List with appropriate client id.