This document is designed to provide you with step-by-step guidance to the most common procedures.
Your Role determines what data you can access and what tasks you can perform; thus you may not be able to do everything listed.

Overview Panel 1

A. Logging In and Logging Out

1. Open your web browser
2. In the **Address** box, enter **https://<hubname>.e2open.com** and press <**ENTER**>
3. At the *Log in* page enter your **User ID** and **Password**
4. Click the **Login** button to access the *Select an Application* page
5. Click **Supply Chain Process Manager (SCPM)** to access the application
6. To logout, click **Exit** in the header at the top right of the page

B. Working with the Navigation Tree

1. Click the [+] to expand a menu in the Navigation tree
2. Click the **Show/Hide Navigation Tree** button to hide/show the Navigation tree

C. Using Search

- Search boxes ARE case sensitive
- Use the asterisk (*) symbol as a wildcard for unknown characters
- Use a comma (,) without spaces to separate multiple items; e.g. item3,item8 to find these 2 items

D. Working with Tables

- To act on items in a list, **check** the box then click the yellow **action** button at the lower right
- To select all the items in a list on that page, click the **top most checkbox**
- For a list of more than 25 items, use the **Previous Page** and **Next Page** buttons to navigate the pages
- To change the column display and their sort order, click the **Table Configure** icon

E. My Workspace

1. Click **My Workspace** to view your dashboard
2. Click the **Total** number to access the specified items
3. Click the **Refresh** icon to update the numbers
4. Click the **Configure** icon to customize your dashboard

Overview Panel 2

F. Viewing an Order

1. Click either **[+]Order Management (Sold Item)** or **[+] Order Management (Purchased Item)**
2. Click either **[+] Blanket Order** or **[+] Discrete Order** or **[+] Customer Order**
3. Click **Summary**
4. Optional, enter your search criteria and click the **Search** button
5. Results are sorted by *Status*, click the *Status* **number** to access the desired list of items
6. On the *Order List* page, click the **Order Number** to access the *Order Details* page

G. Printing a Purchase Order (PO)

1. On the *Order Details* page, click the **Print** button
2. In the *File Download* window, click the **Open** button
3. In the *Adobe Reader* window, click the **Print** button

H. Acting on an Order Line

- You can act upon Orders from either the *Order List* or the *Order Details* page
- **Accept an Order Line**

1. Click the **checkbox** of the Order Line
2. Click the **Accept** button

- **Close an Order Line**

1. Click the **checkbox** of the Order Line
2. Click the **Close** button

- **Cancel an Order Line**

1. Click the **checkbox** of the Order Line
   - o We recommend that you include a *message* about why you are canceling the item by selecting the **Note to Customer** or **Note to Supplier**
2. Click the **Cancel** button

- **Reject an Order Line**

1. Click the **checkbox** of the Order Line
   - o We recommend that you include a *message* about why you are rejecting the item by selecting the **Note to Customer** or **Note to Supplier**
2. Click the **Reject** button

- **Change and Accept an Order Line**

1. Edit the **Quantity** and/or **Date** of the Order Line
2. Click the **Change and Accept** button

More →

I. Viewing a Blanket Release

1. Click **[+] Order Management (Purchased Item)** to expand the Navigation tree
2. Click **[+] Blanket Release**
3. Click **Summary**
4. Optional, enter your search criteria and click the **Search** button
5. Results are sorted by *Status*, click the *Status* **number** to access the desired list of items
6. On the *Release List* page, click the **Release Number** to access the *Details* page

J. Viewing a Shipment

1. Click either **[+] Order Management (Sold Item)** or **[+] Order Management (Purchased Item)**
2. Click **[+] Shipment**
3. Click **Summary**
4. Optional, enter your search criteria and click the **Search** button
5. Results are sorted by *Status*, click the *Status* **number** to access the desired list of items
6. On the *Shipment List* page, click the **Shipment Number** to access the *Shipment Details* page

K. Creating a Shipment

1. Click either **[+] Order Management (Sold Item)** or **[+] Order Management (Purchased Item)**
2. Click **[+] Shipment**
3. Click **Create**
4. Enter your search criteria and click the **Search** button
5. Click the **Order Number checkbox** to select the desired item
6. Click the **Next** button
7. Enter the appropriate data, such as *Shipped Quantity*, *Freight Cost*, etc.
8. Click the **Create Shipment** button

L. Viewing a Receipt

1. Click either **[+] Order Management (Sold Item)** or **[+] Order Management (Purchased Item)**
2. Click **[+] Receipt**
3. Click **Summary**
4. Optional, enter your search criteria and click the **Search** button
5. Results are sorted by *Status*, click the *Status* **number** to access the desired list of items
6. On the *Receipt List* page, click the **Goods Receipt Number** to access the *Receipt Details* page

M. Viewing an Invoice

1. Click either **[+] Order Management (Sold Item)** or **[+] Order Management (Purchased Item)**
2. Click **[+] Invoice**
3. Click **Summary**
4. Optional, enter your search criteria and click the **Search** button
5. Results are sorted by *Status*, click the *Status* **number** to access the desired list of items
6. On the *Invoice List* page, click the **Invoice Number** to access the *Invoice Details* page

N. Creating an Invoice or Credit Note

1. Click either **[+] Order Management (Sold Item)** or **[+] Order Management (Purchased Item)**
2. Click **[+] Invoice**
3. Click either **Create Invoice**
4. Enter your search criteria and click the **Search** button
5. Click the **Order Number checkbox** to select the desired item
6. Click the **Next** button
7. Enter the appropriate data, such as *Quantity Invoiced*
8. Click the **Recalculate** button
9. Click the **Create Invoice** button

More →

O. Demand Supply Sync Basics

- The system organizes item data by a unique combination of the following dimensions, which together are called a 'Collaboration' or 'Collab':
- Data Measures are a grouping of information
  - **Standard** – data input via the user interface or a file upload
  - **Rollover** – data rolled over from existing data measures as the result of an upload
  - **Computed** – data calculated by SCPM
  - **Exceptions** – potential problems flagged by SCPM

P. Accessing a Collab

1. Click either **[+] Demand Forecast/Planning (Sold Item)** or **[+] Demand Channel Inventory (Sold Item)** or **[+] Supply Forecast/Planning (Proc Item)** to expand the Navigation tree

- **Via the Filter**

2. Click either **Forecast Collab Filter** or **Channel Inventory Filter** or **Repl. Inventory Filter** or **Forecast/Inventory Filter**
3. Click the **Item checkbox** to select the item
   - If there is only one item, it will automatically be selected so you can skip immediately to the next parameter
4. Click the **Add** button to add it to the *Filter Builder*
5. Click the yellow **arrow** to the right of the next parameter down
6. Repeat the above steps until your *Filter Builder* is complete
   - Click the **Save** button if you want to keep this filter and use it again in the future
7. Click the **Next** button
8. From the list of Collabs that match your filter criteria, click the **checkboxes** for the items you want to view
9. Click the **View** button

- **Via Search**

2. Click either **Forecast Collab Search** or **Channel Inventory Search** or **Repl. Inventory Search** or **Forecast/Inventory Search**
3. Enter your search criteria and click the **Search** button
4. Click the **Item checkbox** to select the item
5. Click the **View** button

Q. Working with the MCV Page

- **Changing the Date Range**

1. On the *MCV* page you can set **Start Date** and/or **End Date** and/or **Calendar**
2. Click the **Refresh** button

- **Accessing Collaboration Details**

1. On the *MCV* page click the **View Collaboration Details** button
2. Choose the menu item that you want to see

R. Data Measure Input

- **Option 1**

1. On the *MCV* page in the white text boxes for the appropriate Data Measure and time buckets, enter the appropriate values
2. Click the **Update** button
3. Click the **OK** button to acknowledge the number of pit(s) changed

- **Option 2**

1. On the *MCV* page click the **Data Measure** name
2. In the *PIT Info* window, enter the appropriate values
3. Click the **Update** button
4. Click the **OK** button to acknowledge the number of pit(s) changed
5. Click the **OK** button to update the *MCV* page

More →

Download/Upload Panel 7

S. Downloading Items

- Tip: Because you don't get a preview of what is to be downloaded, we recommend that you Save a Search prior to executing a download. Then when you perform the download, Apply the saved search criteria to insure that you download exactly the right information.

1. Click **[+] Upload / Download**
2. Click **[+] Downloads**
3. Click **[+] Forecast/Inventory (Sold Item)** , or **[+] Order Execution (Sold Item)**, or **[+] Forecast/Inventory (Proc Item)**, or **[+] Order Execution (Proc Item)**
4. Click the desired **option**

- **Process 1**

5. Enter your search criteria
   - We recommend that you Apply a pre-saved filter
6. Click the **Search to Download** button
7. Click the **Select Document Type** radio button
8. Optional, enter **Comments** to reference your download
9. Click the **Next** button
10. At the *Acknowledgement* page, click **Go to Inbox**

- **Process 2**

4. Click the **Select Document Type** radio button
5. Optional, enter **Comments** to reference your download
6. Click the **Next** button
7. Set the **Start Date** and **End Date**
8. From the **Delta Type** pull down menu, choose the desired option
9. Optional, click the **Delta Only** checkbox to select this choice
10. Click to select the appropriate **Data Measure Selection** options
    - Use Ctrl + click to select more than one data measure
11. Click the **Next** button
12. Click the **Item checkbox** to select the item.
    - If there is only one item, it will automatically be selected so you can skip immediately to the next parameter
13. Click the **Add** button to add it to the *Filter Builder*
14. Click the yellow **arrow** to the right of the next parameter down
15. Repeat Steps 12-14 until your *Filter Builder* is complete
    - We recommend that you Apply a pre-saved filter
16. Click the **Next** button
17. At the *Acknowledgement* page, click **Go to Inbox**

Download/Upload Panel 8

T. Uploading Items

1. Click **[+] Upload / Download**
2. Click **[+] Uploads** to expand the Navigation tree
3. Click **[+] Master Data**, or **[+] Forecast/Inventory (Sold Item)** , or **[+] Order Execution (Sold Item)**, or **[+] Forecast/Inventory (Proc Item)**, or **[+] Order Execution (Proc Item)**
4. Click the desired **option**
5. Click the **Select Document Type** radio button if more than one option
6. Click the **Browse…** button and select the file to upload
7. Optional, enter **Comments** to reference your upload
8. Click the **Next** button
9. At the *Acknowledgement* page, click **Go to Inbox**

U. Checking Upload / Download Status

1. After stepping through the download / upload process, in the *Acknowledgement* window, click **Go to Inbox**; or in the **[+]** Upload / Download Navigation tree, click **Status**
2. In the *Status* column if your download / upload is 'Queued' or 'In Process', wait a few minutes and then click the **Refresh** icon
   - Repeat step 2 until the *Status* indicates 'Completed'
3. In the *Status* column, click **Completed** to see details of your download / upload
   - If the *Status* column displays an exclamation point icon, an error occurred with the file. In that case, click the **exclamation point** icon to review the error file that explains the problem
4. To close the *Status* window, click the **Close** button
5. To begin the download process, in the *File Name* column, click the **file name**
6. Click the **Save** button
7. Note the *Save in* folder and *File name*, then click the **Save** button
8. View and edit the downloaded file using Microsoft Excel

More →

Other Panel 9

V. Viewing an Exception

1. Click **[+] Exceptions** to expand the Navigation tree
2. Click either **[+] Forecast/Inventory (Sold Item)** or **[+] Order Execution (Sold Item)** or **[+] Forecast/Inventory (Purchased Item)** or **[+] Order Execution (Purchased Item)**
3. Click the item of interest
4. Optional, enter your search criteria and click the **Search** button
5. Results are sorted by problem type. click the *Problem Name* **number** to access the desired list of items

W. Viewing a Report

1. Click **[+] Reports** to expand the Navigation tree
2. Click either **[+] Demand Supply Sync**, or **[+] Inventory Management**, or **[+] Order Management**
3. Click the desired **Report** option
4. Click the **Item checkbox** to select the item
   - If there is only one item, it will automatically be selected so you can skip immediately to the next parameter
5. Click the **Add** button to add it to the *Filter Builder*
6. Click the yellow **arrow** to the right of the next parameter down
7. Repeat Steps 4-6 until your *Filter Builder* is complete
8. Click the **Next** button
9. Enter the **Start Date** and **End Date**
   - Click the **Save** button if you want to keep this filter and use it again in the future
10. Click the **View Report** button

Other Panel 10

X. Viewing History

1. For the item of interest, click **History**
2. Enter your search criteria, and click the **Search** button
3. If you see a [+] in the *Audit Details* section, either click the **[+]**, or click the **Expand All** checkbox then click the **Refresh** button
   - User “broker_admin_user1” is reference to a Server operation

Y. Help

- Pop-up blocker software can prevent certain functions from occurring
  - o To temporarily disable Pop up Blocker software, press either the **Alt** Key or **Ctrl** key while clicking
  - o The permanent fix is via **Tools -> Internet Options...** on either the **Privacy** tab allow pop ups from e2open.com, or on the **Security** tab make e2open.com a safe site zone
- In the Header at the top right corner of page, click the **Help** link to access online documentation
- Contact your **internal Help Desk**
- Contact **E2open Customer Support**

  Phone: **650-299-8111**

  Email: **customersupport@e2open.com**

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