

intra-mart WebPlatform/AppFramework
Ver.7.1

Group Administrator Operation Guide

Second Edition: August 31, 2009

❖ Revision History

Revision date	Revision details
May 1, 2009	First edition
August 31, 2009	Second edition Modified "official group" to "public group" in the document. Corrected printing errors in "1.15 Message customization settings".

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Chapter 1 Login group administration

1.1

Tasks of Login Group Administrators and Login

Login group administrators have various privileges in the login group they are entrusted by the system administrator.



1.1.1 Tasks of Login Group Administrators

The system administrator carries out the following administrative tasks concerning login groups, their administrators, and common settings such as settings for intra-mart database connection.

Login group administration

Administration of roles, accounts, account licenses, menus, calendars, and batch procedure for each login group.

Application common master administration

Administration of resources commonly used among intra-mart application software series which operate on login groups. The resources include organizations, job titles, and public group type settings.



1.1.2 Logging in as a Login Group Administrator

A login group administrator logs into intra-mart using the following procedure.

1

Start the browser and enter the intra-mart URL as shown below.

The intra-mart login screen will be displayed.

```
intra-mart WebPlatform(standalone) : http://host_name : 8080/imart/(login group ID).manager
intra-mart WebPlatform (distributed system) : URL matching the registered details on the web
server connector
intra-mart AppFramework: URL matching the intra-mart registration details corresponding to the
web application server
```



- When using the intra-mart WebPlatform in a standalone style, the port number of the URL to be accessed (i.e., the web server port) can be specified during installation.
- For convenience, it is recommended to register the URL as a bookmark in the browser.



Column

Automatic Authentication without the Login Screen

A user code and password can be included in the URL as follows when logging into intra-mart.

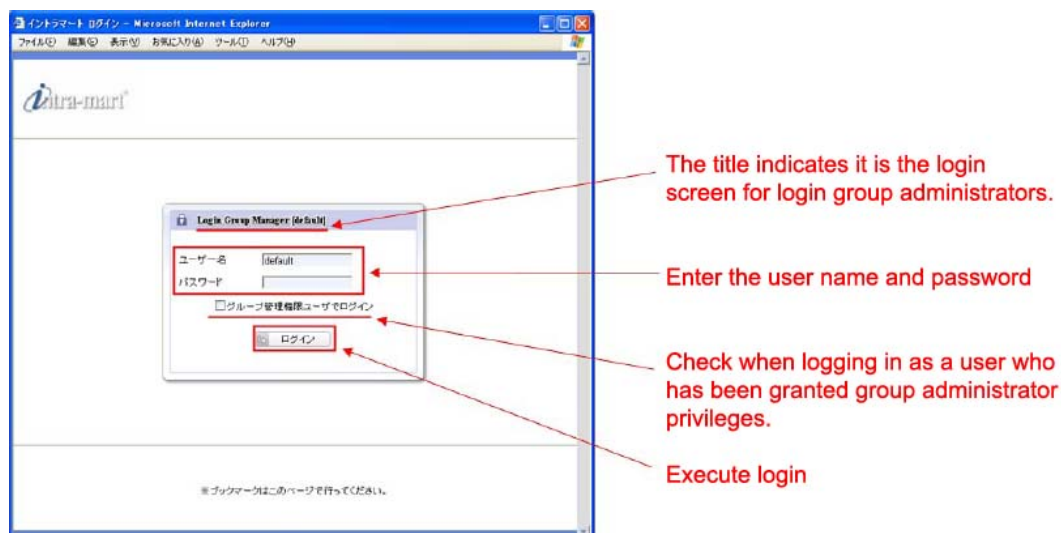
`http://intramart/imart/(login group ID).manager?im_user=xxxx&im_password=yyyy`

xxxx: User code yyyy: Password

When logging in by entering the URL described above, automatic authentication is performed without displaying the login screen.

2 Enter the user code and password in the login screen.

When logging in as a login group administrator (original login group administrator) set by the system administrator, clear the [Login as group administrative privilege user] check box and click the [Login] button. When logging in as a user who has been granted group administrative privileges by the original login group administrator, select the [Login as group administrative privilege user] check box and click the [Login] button. (For details on group administrative privileges users, refer to [1.12 Setting Login Group Administrative Privileges Users].)



<intra-mart login screen>



<intra-mart initial screen>



1.1.3 Home Screen

The home screen is the initial screen displayed when logging into intra-mart. When any other screen is displayed after selecting a menu item, the home screen is displayed by clicking the [HOME] button at the top left of the screen.

[HOME] button:

[LOGOUT] button:

[MENU ON/OFF] button:

Returns to the login initial screen (home screen)

Logs you out and returns to the login screen

Displays or hides the menu on the left



1.1.4 Logging Out from intra-mart

To log out and end intra-mart, return to the login screen. To return to the login screen, click the [LOGOUT] button at the top of the menu on the left of the screen.



- When closing the browser without clicking the [LOGOUT] button on the menu, or leaving the intra-mart screen by moving to another page, the intra-mart server assumes that you are still logged in until session(s) are expired. Make sure to click the [LOGOUT] button on the menu.



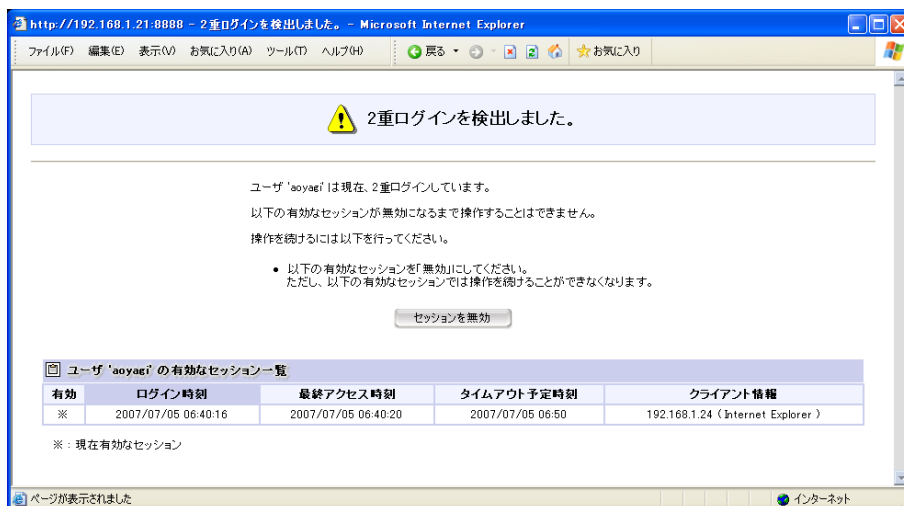
1.1.5 Duplicate login prevention function

The intra-mart has a function to prevent duplicate logins (default: disabled), which can be enabled or disabled.

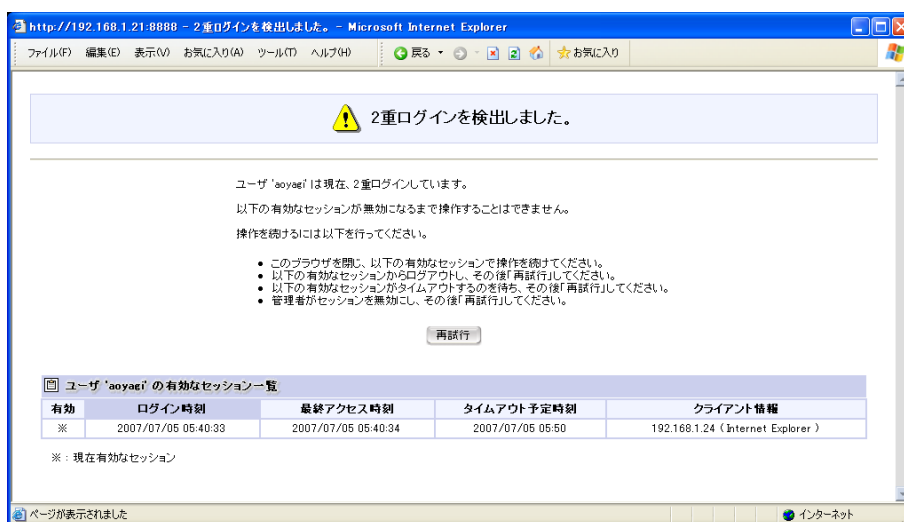
When the duplicate login prevention function is enabled, a second and any subsequent sessions are prevented, and login becomes invalid. Consequently, to log in by the second session, it is necessary to disable a temporary (valid) session.

The duplicate login prevention function can be set that general users and login group administrators can prevent unnecessary sessions themselves.

When a duplicate login is detected, the following screen will be displayed.



<Screen when the settings permit the users themselves to disable the session>



<Screen set only to notify the existence of a duplicate login>

When the intra-mart is set only to notify the existence of a duplicate login, further operations cannot be continued when a duplicate login is detected. In such cases, operations can be continued using the following methods.

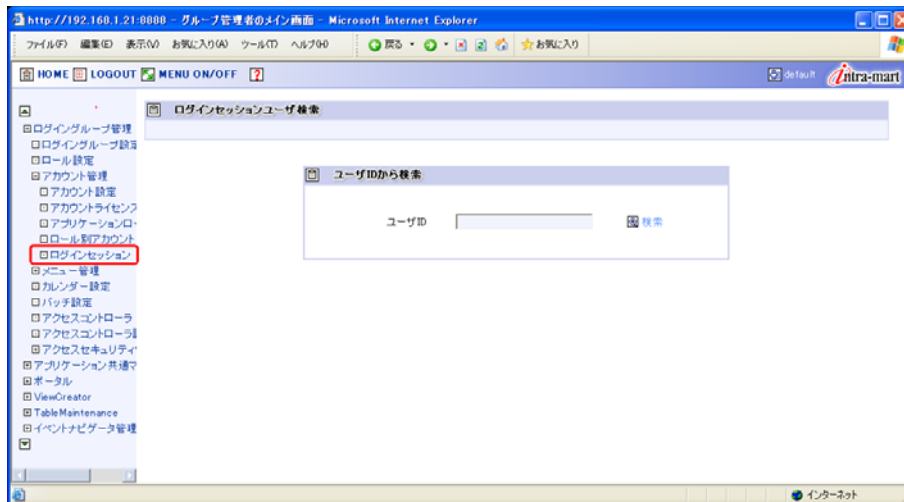
- ❖ Continue operations using a valid session.
- ❖ Log out from a valid session, and click the [Retry] button on the screen shown above.
- ❖ Wait until a valid session is expired, and click the [Retry] button on the screen shown above.
- ❖ Request the system administrator to disable a valid session, and click the [Retry] button on the screen shown above.



1.1.5.1 Invalidating Sessions

Login group administrators can monitor the login status of general users under his/her management and invalidate their sessions. To do this, use [Login group administration] - [Account administration] - [Login sessions] screen.

- 1 Click [Login group administration] - [Account administration] - [Login sessions].
The [Login session user search] screen is displayed.



<[Login group session] screen>

- 2 Enter the user ID you want to display and click the [Search] icon. Or, leave the user ID column blank and click the [Search] icon.
A list of sessions for login users is displayed.



<[Login group session] screen>

- 3 Select the session you want to invalidate and click the [Invalidate] icon.
The selected session is invalidated.

1.2 Login Group Settings

When a login group is created by the system administrator, the login group is set with the default settings such as the locale and encoding. Login group administrators can change these settings for the login group under his/her management using the [Login group administration] - [Login group settings] screen. The user ID and password for the login group administrator can be set in this screen.



1.2.1 [Login group] Tab

This tab can be used to register basic data for a login group. Settings by the group administrators on this tab become the default for the login group. Note that settings by each user take precedence.

<[Login group settings] screen - [Login group] tab>

Login group ID

Name of the login group.

Locale

Select the default language for this login group.

Account lock count

When the number of failed login attempts exceeds the number specified in this field, the user cannot login for the duration (in minutes) specified in [Account lock period]. Specify "0" to not lock the account so that the user can continue his/her login attempts.

Account lock period (minutes)

When the user's account is locked, the user cannot login for the duration (in minutes) specified in this field.

If "0" is specified, the lock is never cleared.

In such a case, the login group administrator must manually clear the lock in the [Account settings] screen.

Page color pattern

Select the default color pattern for this login group. Five color patterns: "Blue", "Green", "Gray", "Orange", and "Red" are pre-registered.

Main page pattern

Select the default screen pattern for this login group. Screen patterns can be added or deleted. The main page pattern lists URLs of the page which is displayed after general users' successful login. Users can select a page from this list.



1.2.1.1 Adding a Main Page Pattern

The main page can be added, deleted, and edited by users. An original design for this version, and two designs for V5.x are already registered as standard.

<Screen for adding and editing main page patterns>

Page pattern ID (required)

Specify the pattern ID of the page which is displayed after a login.

Page URL (required)

Specify the URL of the page pattern which is displayed after a login. When the URL is for a script development model, specify a relative path from "pages/**/src" and add an extension ".jsp" at the end. Otherwise, specify a relative path from the context path.

Page image URL

Specify the outline image of the page pattern which is displayed after a login. Use a relative path from the context path.



1.2.2 [Login group administrator] Tab

The [Login group administrator] tab displays the user ID and password of a login group administrator who has been registered by the system administrator. The login group administrator can change the user ID and password on this tab.

<[Login group settings] screen - [Login group administrator] tab>

User ID (required)	Enter the login ID of a login group administrator.
Password	Enter the password used by the login group administrator when logging in.
Password (confirm)	Re-enter the string entered in [Password].
User locale	Select the language used by the login group administrator. The default is "Japanese".
Email address	Enter an email address to contact the login group administrator. This address can be used to contact the login group administrator in intra-mart application software.
Telephone number	Enter a telephone number to contact the login group administrator.

1.3

Account License Settings

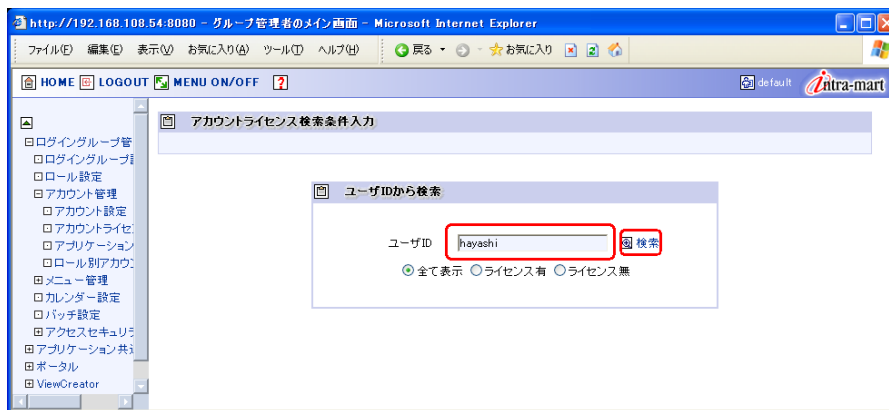
The account licenses assigned to a login group must be assigned to users by the login group administrator. The account license can be set on the [Account settings] screen when registering a user; otherwise, the license can be assigned more efficiently to all registered users using the [Login group administration] - [Account administration] - [Account license settings] screen as explained below.

This screen provides two methods to display the target accounts and assign the license. One is to search a specific account, and another is to specify a condition [Display all], [Has license], or [No license]. These conditions can be used to narrow down the search.



1.3.1 Searching and Assigning to a Specific Account

- 1 Enter an account in the user ID column, select the display method, and click [Search].
User IDs are searched by partial match.



- The condition [Display all], [Has license], or [No license] can be used to narrow down the search.

- 2 Assign the license to the displayed users by selecting [License] and click the [Register] button.

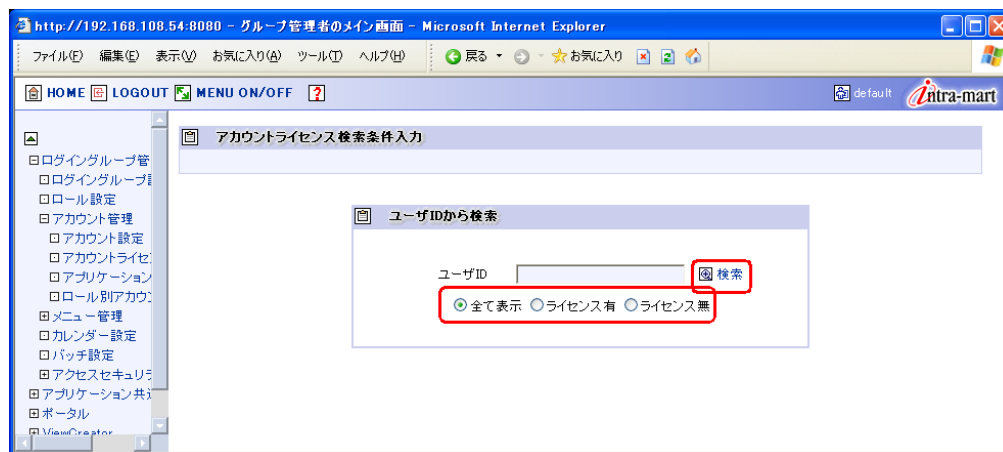




1.3.2 Displaying and Assigning to Multiple Accounts

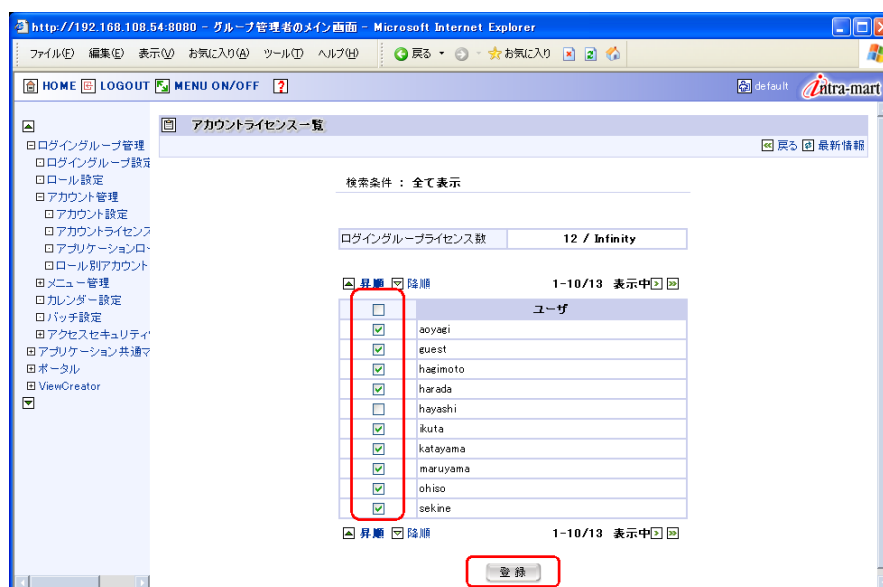
The conditions [Display all], [Has license], or [No license] can be specified to display multiple accounts.

- 1 Select [Display all], [Has license], or [No license] and click [Search] icon.
Leave the user ID column blank.



- 2 Assign the license to the displayed users by selecting the respective check box and click the [Register] button.

Use the [<<], [<], [>], and [>>] icons to move to the top page, previous page, next page, and the last page when there are multiple pages.



1.4 Application Role Settings

Similar to the account license, application roles must be assigned on accounts (users) before using intra-mart application software. The application role can be set on the [Account settings] screen for each account; otherwise, the application role can be assigned more efficiently to multiple accounts using the [Login group administration] - [Account administration] - [Application role settings] screen.

This screen provides two methods to display the target accounts and assign the license. One is to search a specific account, and another is to specify a condition [Display all], [Has role], [No role]. These conditions can be used to narrow down the search.



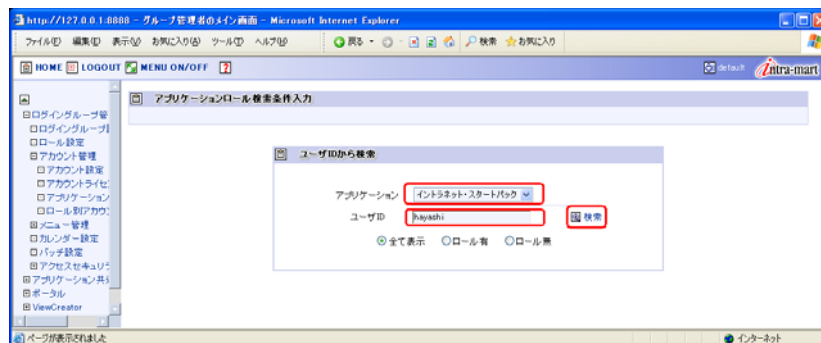
- A message [The application role does not exist] is displayed if the corresponding application software is not installed.



1.4.1 Searching and Assigning to a Specific Account

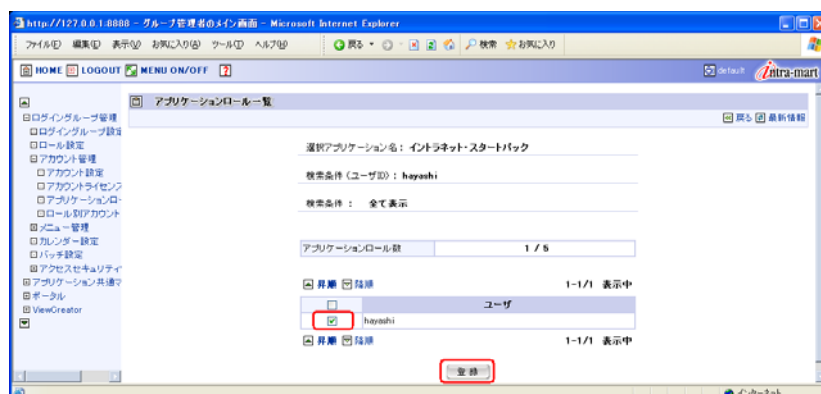
- 1 Select application software, enter an account in the user ID column, select the display method, and click [Search].

User IDs are searched by partial match.



- The condition [Display all], [Has role], or [No role] can be used to narrow down the search.

- 2 Assign the application role to the displayed users by selecting the respective check box and click the [Register] button.

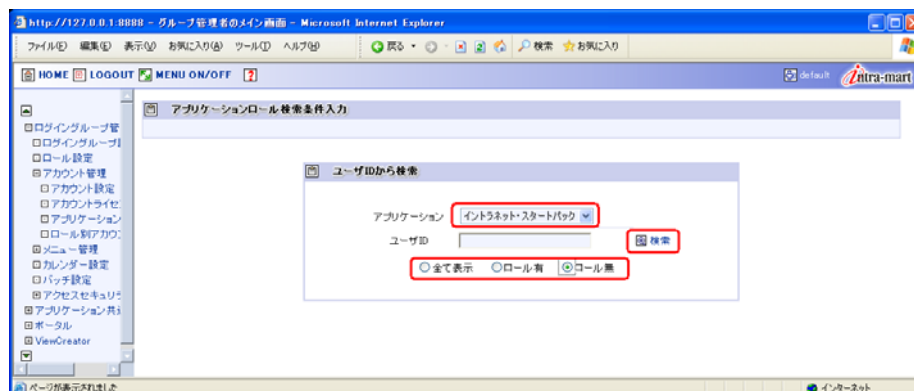




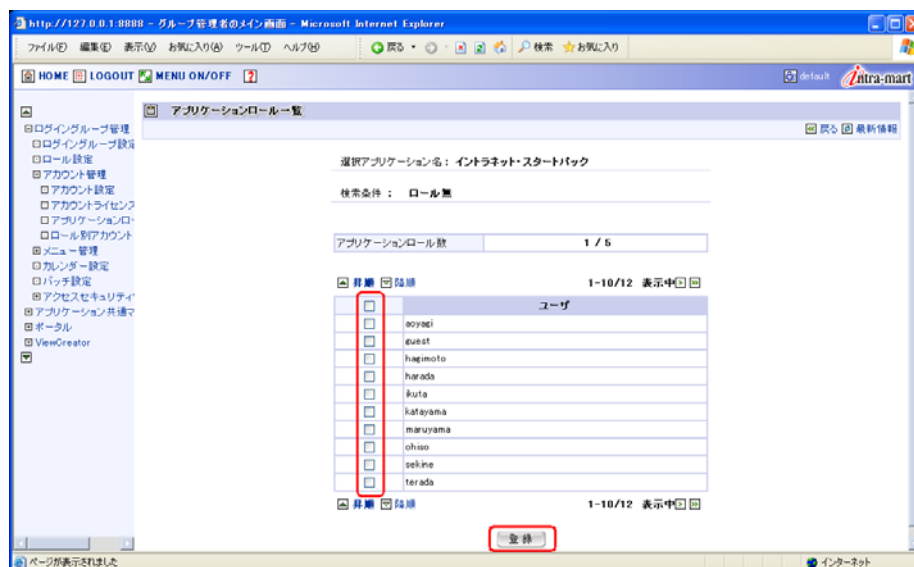
1.4.2 Displaying and Assigning to Multiple Accounts

The condition [Display all], [Has role], or [No role] can be specified to display multiple accounts.

- 1 Select application software, select [Display all], [Has role], or [No role], and click [Search] icon. Leave the user ID column blank.



- 2 Assign the application role to the displayed accounts by selecting the respective check box and click the [Register] button.
Use the [<<], [<], [>], and [>>] icons to move to the top page, previous page, next page, and the last page when there are multiple pages.



- The number of application roles column displays the total number of available application roles and the number of assigned application roles.

1.5

Access Security Administration

This section describes the concept and settings of intra-mart access security. Access to folders and pages can be controlled from various system setting screens in intra-mart. Therefore, any access privileges can be controlled flexibly without modifying programs.



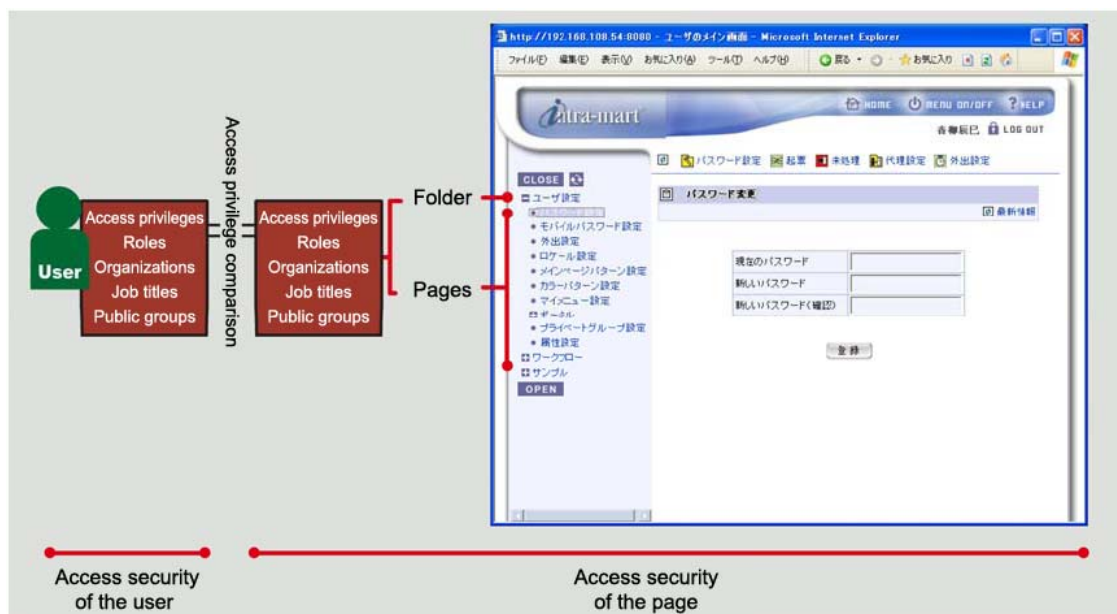
1.5.1 Concept of intra-mart Access Security

The intra-mart access security is implemented by setting access privileges on users. Access privileges can also be set on folders or pages. When a user logs in, access privileges set on the user and access privileges set on folders and pages are compared, and only folders and pages available to each user are displayed.

The following access privileges can be used in intra-mart.

```
[Role]
[Organization]
[Job title]
[Public group]
```

For example, set a certain page to be available to the department manager (job title) of a certain department (organization), or people with a specific role.



<intra-mart access security>



- "role" access privilege can be granted by setting a role to a user in [Account settings]. Other access privileges (organization, job title, public group) can be granted by adding a user to an organization, job title, or public group.
- Among the access privilege setting methods, "role" is explained in this section. Refer to [1.8 Application Common Master] for setting privileges on "organization", "job title", and "public group".
- For details on access security, refer to [Access Security Specifications].



1.5.2 Role Settings

The "role" is one of access privileges of intra-mart. Access security is enabled by creating a role in [Role settings] and setting it on a user and a folder or page to establish access security.

Roles are managed in [Login group administration] - [Role settings]. Roles can be flexibly created by users and these separate roles have no hierarchy in general. However, roles may have parent-child relationships when they are nested.

カテゴリ	ロール名	表示名
	bpwsuper	ワークフロー管理
	guest	ゲストロール
	level1	レベル1ユーザ
	level2	レベル2ユーザ
	level3	レベル3ユーザ
	userSetting	ユーザ設定ロール

サブロール	ロール名	表示名
<input type="checkbox"/>	guest	ゲストロール

<[Role settings] screen>

Category (left column)

Select a registered category. When a category is selected, only roles under the category are displayed. Categories can be registered in the role's setting screen.

Role name (left column)

Enter a string to display roles whose names partially match the string.

(List of roles)

A list of registered roles is displayed. Roles can be displayed under a category or partially match the specified role name. When a role name is clicked, the details are displayed on the right and the setting contents of the role are updated.

Role ID

The identifier of the role used internally by the system. No need to change in general.

Role name (required) (right column)

Enter the role name.

Category (right column)

Enter the category name to categorize the role. If you register a category name, the category name can be used to narrow down a search when selecting a role.

Display name (required)

The role name used by application software to display a role is displayed. When using multiple languages, switch the language using the combo box and enter the name in all used languages.

Sub-role

Select other roles to be included in the role which is currently being displayed or registered. Click the [Add] button to display the window below, which allows you to select from registered roles.

ロールサブロール選択

カテゴリ

ロール名

	カテゴリ	ロール名	表示名
<input type="checkbox"/>		bpwsuper	ワークフロー管理者
<input type="checkbox"/>		level2	レベル2ユーザ
<input type="checkbox"/>		level3	レベル3ユーザ
<input type="checkbox"/>		userSetting	ユーザ設定ロール

決定

キャンセル

For details of sub-roles, refer to the next column [Roles and Sub-roles].

Remarks

Enter remarks on the role.



- For [Data Import] and [Data Export] operations, refer to [1.5.8 Importing Access Security] and [1.5.9 Exporting Access Security].



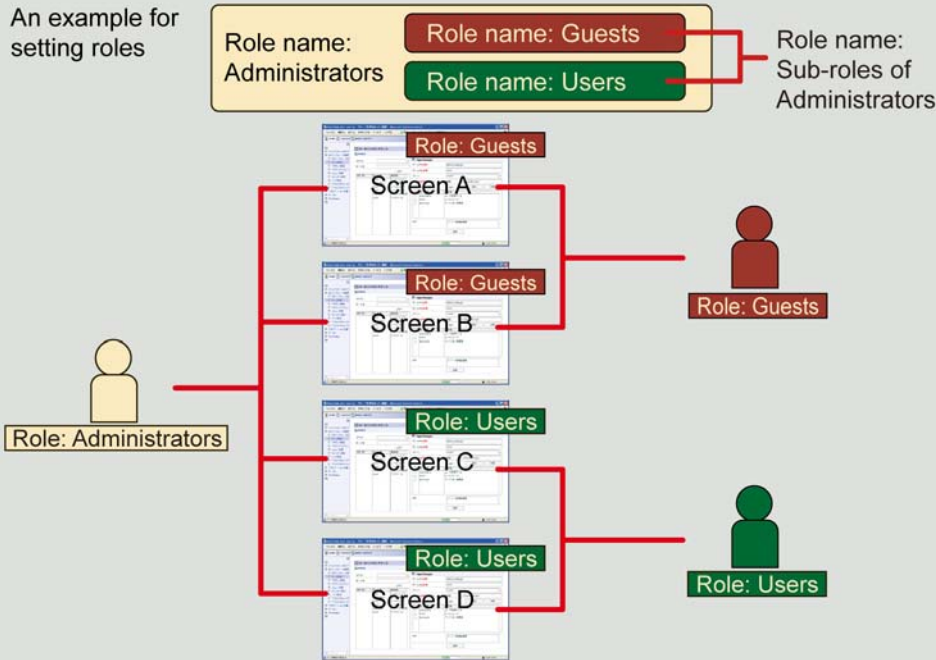
Column

Roles and Sub-roles

Roles can be nested.

For example, if you include roles "Guests" and "Users" in a role "Administrators", users with the "Administrators" role can view pages permitted to the "Guest" role and "User" role.

An example for setting roles





1.5.3 Registering a User (Account Information and Profile Information)

The "account" information and the "profile" information of a user can be registered in the [Login group administration] - [Account administration] - [Account settings]. The "account" information contains intra-mart login information and access security information. The "profile" information includes the user's address, telephone number, email address, etc. and is used by intra-mart application software. Generally, users have these two types of information whereas special users such as "guest" has only "account" information to log in since "guest" does not represent a specific person.

All "account" information and "profile" information of registered users are stored in the database.

Select [Account] or [Profile] to switch the displayed information.

You can add new users, accounts, and profile information or delete them.

User code / User name

Enter a user code or user name to narrow down the users displayed on the list by partial match. You cannot use a user name when you select account above.

You can switch between [Main], [Account], and [Profile] information using tabs.

List of users

Select a user from the list to display the user's information on the right.

[Update/Add] button

Update with or add the entered information.

<[Account settings] screen>

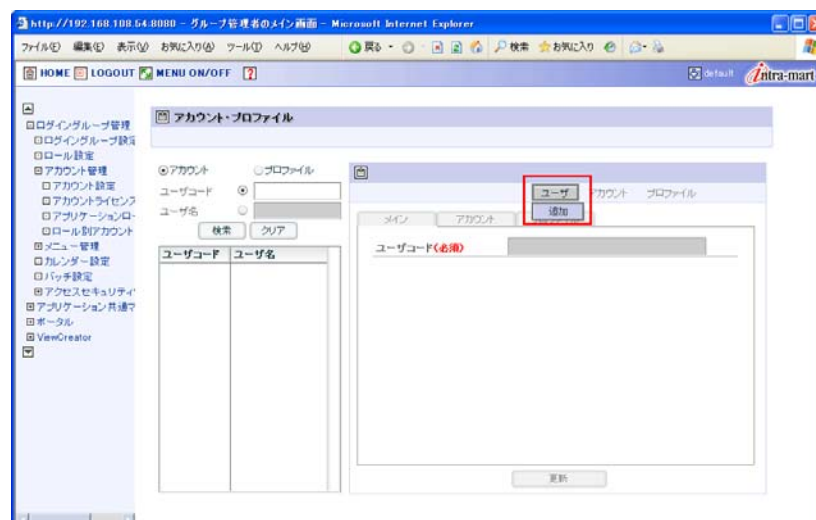


1.5.3.1 Registering a New User

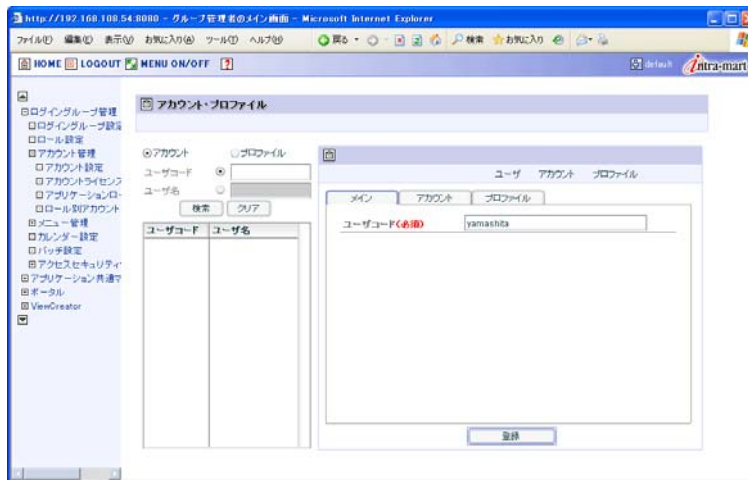
The following describes how to register a user.

1

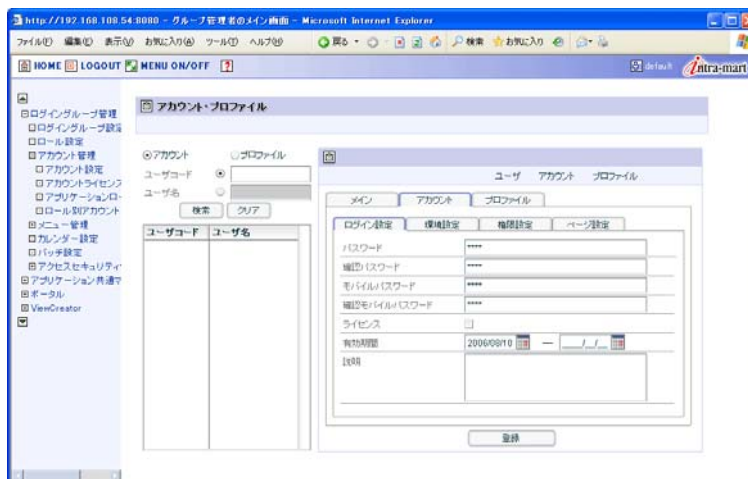
Click [User] and select [Add] from the displayed menu.



2 Enter the user code on the [Main] tab.



3 Click the [Account] tab and enter information on the [Login settings] tab.



Password/Confirm password

Mobile password

/Confirm mobile password

License

Period of validity

Description

Enter the password for login.

Enter the password for login from a mobile.

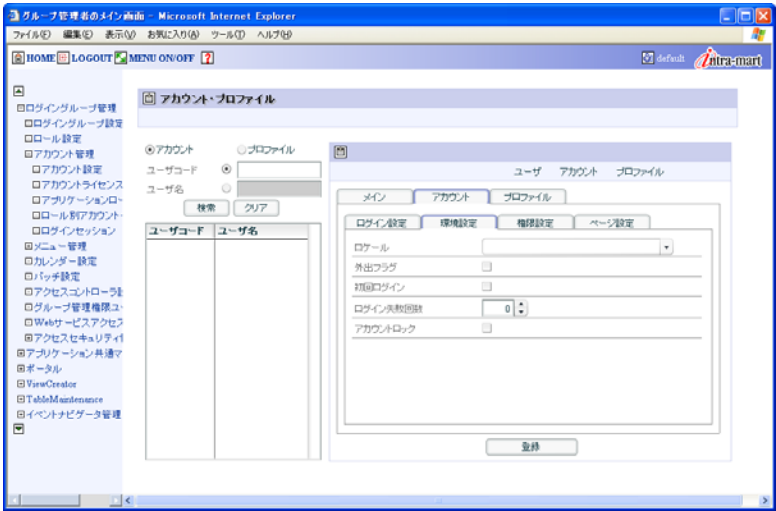
If a password check of the password history management function is enabled, only the characters that are allowed in passwords can be registered.

Select the check box to assign a license, which is assigned to the login group. A user cannot log in without a license. Use [Login group administration] - [Account license settings] when assigning licenses to all accounts.

The duration where this account is valid. In order for a user to log in using this account, the account must be within the valid duration and the license check box is selected. For detail information on the period of validity, refer to the column [Handling of the End Date of the Period of Validity] (p. 20).

Enter the description of this account.

4 Click the [Environment settings] tab and enter information.



Locale

Select the default language for this account. Note that the setting specified by the user in the [Locale settings] in the [User Settings] takes precedence over this setting.

Out of office flag

Select this check box to indicate that the user is out of office as the default. Note that the setting specified by the user in the [Out of office settings] in the [User Settings] takes precedence over this setting.

Initial login

Select this check box to display the following screen to prompt a password change when the user logs in for the first time. Use the password history management function to specify whether or not to display the password change screen. Refer to [System Administrator Operation Guide].



Number of login failures

The number of login failures so far on this account is displayed. This indicates that the user has not logged in successfully using this account. This number is reset to 0 when the user is successfully logs in using this account.

Account lock

Select this check box to lock the account and disable user login.



Column

Handling of the End Date of the Period of Validity

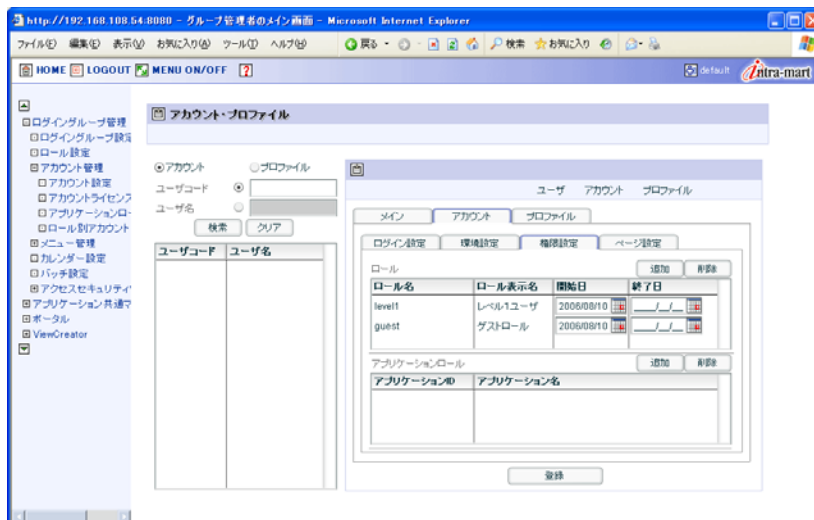
The period of validity can be set on various information setting items in intra-mart. A period of validity is specified by the "Start date" and "End date". In this time, the system stores "the end date as end date specified by the user + 1" in the database.

Start date (January 1) <= Specified period of validity <= End date (March 31)

Start date (January 1) <= Period of validity in the system < End date (April 1)

The system displays "end date in the system - 1" in any maintenance screens.

5 Click the [Privilege settings] tab and enter information.



Roles

Select the roles set on this account. Enter the start date and end date of the role. Click the [Add] button to display the window below, which allows you to select from registered roles. The codes of each role can be displayed in this window.

ロール検索

カテゴリ:

ロール名:

☐ コード表示

<input type="checkbox"/>	カテゴリ	ロール名	表示名
<input type="checkbox"/>		bpwsuper	ワークフロー管理権
<input type="checkbox"/>		guest	ゲストロール
<input type="checkbox"/>		level1	レベル1ユーザ
<input type="checkbox"/>		level2	レベル2ユーザ
<input type="checkbox"/>		level3	レベル3ユーザ
<input type="checkbox"/>		userSetting	ユーザ設定ロール

決定 キャンセル

Application roles

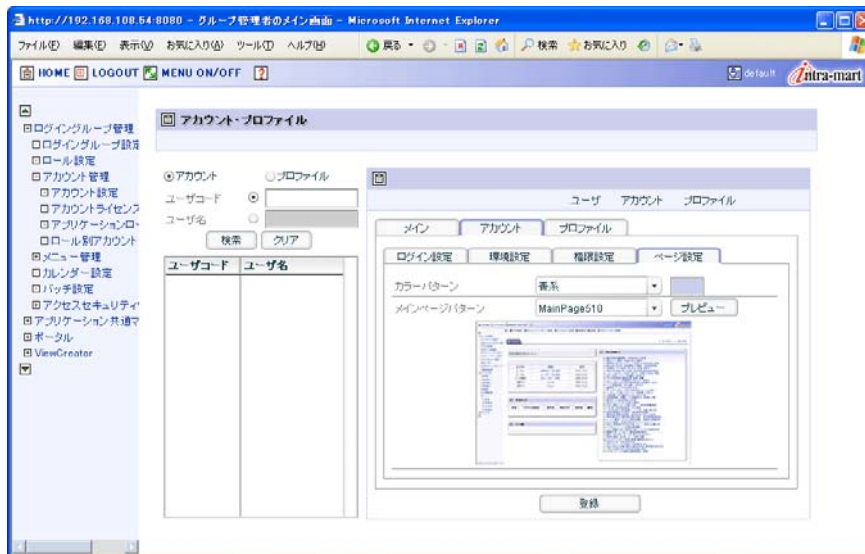
Select application software to permit the user with this account to use installed application software (intra-mart Start Pack, etc.). Click the [Add] button to display the window below, which allows you to select application software.

アプリケーション検索

<input type="checkbox"/>	アプリケーションID	アプリケーション名	ライセンス
<input type="checkbox"/>			

決定 キャンセル

6 Click the [Page settings] tab and enter information.



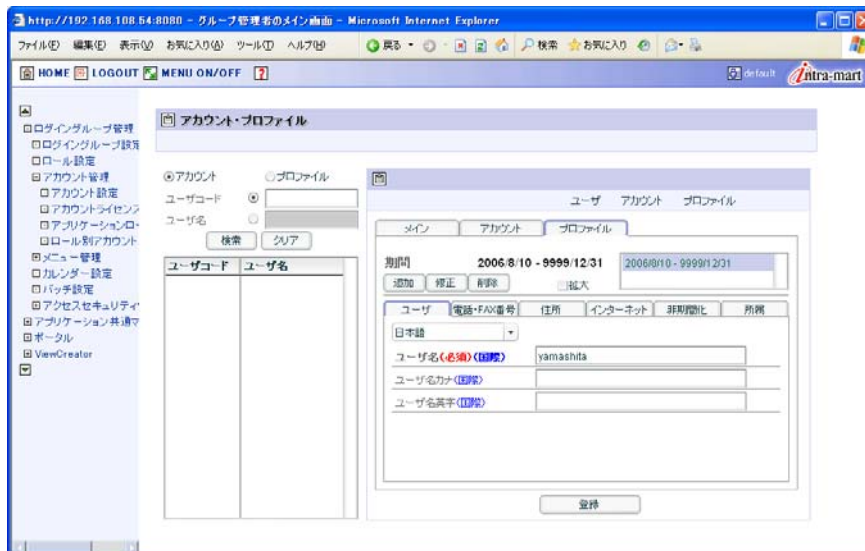
Page color pattern

Select the default color pattern of the screen for this account. Five color patterns: "Blue", "Green", "Gray", "Orange", and "Red" are pre-registered. Note that the setting specified by the user in the [Color pattern settings] in the [User Settings] takes precedence over this setting.

Main page pattern

Select the default screen pattern for this account. The screen pattern registered in [Login group administration] - [Login group settings] is displayed. Note that the setting specified by the user in the [Main page pattern settings] in the [User Settings] takes precedence over this setting. The main page pattern lists URLs of the page which is displayed after general users' successful login. Users can select a page from this list.

7 Click the [Profile] tab and enter the period of validity for the profile information.



[Add] button

As the default, the start date is set to the current date and the end date is set to the maximum valid date of the system. Modify the end date first and enter the subsequent duration.

[Update] button

Click to modify the selected period on the list.

[Delete] button

Click to delete the selected period on the list.

Enlarge

Check the box to enlarge the display of the list of periods.

(List of the periods)

When multiple periods are registered, the profile of the selected period is displayed underneath.



Column

Period Settings

Be sure to consider that overlapping periods cannot be registered at once when setting periods.
For example, the following periods cannot be registered.

(Example 1)

Period (1) 01/01/2000 - 12/31/2004

Period (2) 01/01/2002 - 12/31/2008

(Example 2)

Period (1) 01/01/2000 - 12/31/2004

Period (2) 01/01/2000 - 12/31/2004

The following periods can be registered properly.

Period (1) 01/01/2000 - 12/31/2004

Period (2) 01/01/2005 - 12/31/2006

8 Enter information on the [User] tab. Each information must be entered by periods and by languages.

User name (required)

Enter the user name. The organization code entered on the [Main] tab is displayed as the default.

User name (katakana)

Enter the user name in katakana (Japanese).

User name (kanji)

Enter the user name in kanji (Japanese).

9 Click the [Phone / fax number] tab and enter information. Each information must be entered by periods.

Telephone number

Enter the telephone number.

FAX number

Enter the fax number.

Extension number

Enter the extension number.

FAX extension number

Enter the fax extension number.

Mobile phone number

Enter the mobile phone number.

10 Click the [Address] tab and enter information. Each information must be entered by periods.

The screenshot shows the 'アカウント・プロフィール' (Account/Profile) page in the Intra-mart Group Administrator. The 'アドレス' (Address) tab is active. The form contains the following fields:

- 期間** (Period): 2006/8/10 - 9999/12/31
- 国コード** (Country code): [Field]
- 郵便番号** (Postcode): [Field]
- 住所** (Address): [Field]
- 言語** (Language): 日本語
- インターネット** (Internet): [Field]
- 非同期化** (Asynchronous): [Field]
- 所属** (Affiliation): [Field]

Country code

Enter the country code.

Postcode

Enter the postcode.

Address

Enter the address. Multiple languages are supported. Switch between the registered languages to enter the address.

11 Click the [Internet] tab and enter information. Each information must be entered by periods.

The screenshot shows the 'アカウント・プロフィール' (Account/Profile) page in the Intra-mart Group Administrator. The 'インターネット' (Internet) tab is active. The form contains the following fields:

- 期間** (Period): 2006/8/10 - 9999/12/31
- メールアドレス1** (Email address 1): [Field]
- メールアドレス2** (Email address 2): [Field]
- 携帯メールアドレス** (Mobile phone email address): [Field]
- URL**: [Field]

Email address 1, 2

Enter the email address. Up to two email addresses can be specified.

Mobile phone email address

Enter the mobile phone email address.

URL

Enter the URL for the homepage.

12 Click the [Non-terminable] tab and enter information.

アカウント・プロフィール

アカウント プロフィール

期間 2006/8/10 - 9999/12/31 2006/8/10 - 9999/12/31

追加 修正 削除 拡大

ユーザー 電話・FAX番号 住所 インターネット 非定期化 所属

ソートキー

備考

登録

Sort key

Remarks

Enter a number for sorting. Up to five digits can be entered.

Enter remarks.

13 Click the [Member] tab and enter information.

アカウント・プロフィール

アカウント プロフィール

期間 2007/7/4 - 9999/12/31 2007/7/4 - 9999/12/31

追加 修正 削除 拡大

ユーザー 電話・FAX番号 住所 インターネット 非定期化 所属

2007/07/04 所属追加 所属削除 所属期間

	組織名	役職
<input checked="" type="checkbox"/>	サンプル会社 / サンプル部門01	

登録

[Calendar] button

[Add membership] button

[Delete membership] button

[Membership period] button

Select the date when the user became the member.

Select the organization of which the user is a member. The codes of companies and organizations in this window can be displayed.

Click to delete the selected membership.

Select the period where the user has been a member of the organization. Specify whether it is the main membership, and select the job title. The membership period cannot be specified unless the membership information has already been registered.



1.5.4 Folder and Page Access Privilege Settings

Roles (access privileges) for folders and pages can be set in [Login group administration] - [Menu settings].
For more details, refer to [1.6 Menu Settings].



1.5.5 Other Access Privileges (Organization, Job Title, Public Group) Settings

Access privileges such as organizations and public groups are set in the registration screen of [Application common master administration] - [Organization settings] and [Public group settings] by specifying member users. Job titles are set by selecting a job titles when specifying member users in [Organization settings].
For more details, refer to [1.8 Application Common Master].



1.5.6 List of Accounts by Role

[List of accounts by role] is a function to display accounts with the given role.

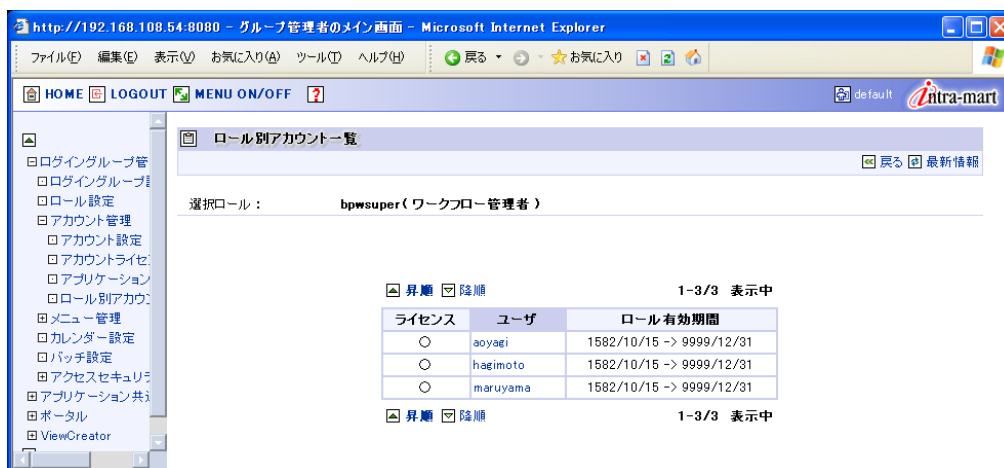
The account edit screen can be displayed by selecting from the list.

To do this, use the [Login group administration] - [Account administration] - [List of accounts by role] menu.

- 1 Select [Login group administration] - [Account administration] - [List of accounts by role].
A list of registered roles is displayed.

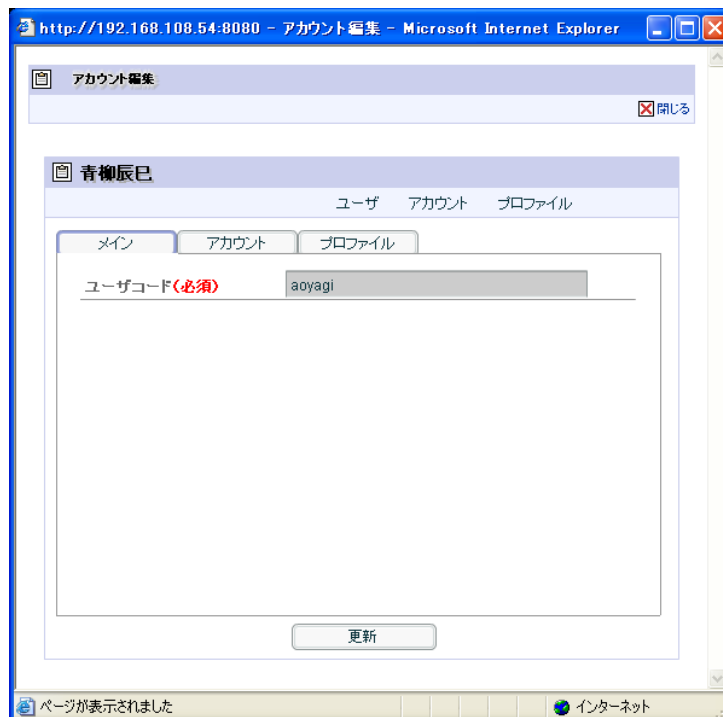


- 2 Click a role name.
Accounts with the selected role are displayed.



3 Click a displayed account name.

The [Edit account] screen is displayed. Edit account information and profile information as needed.

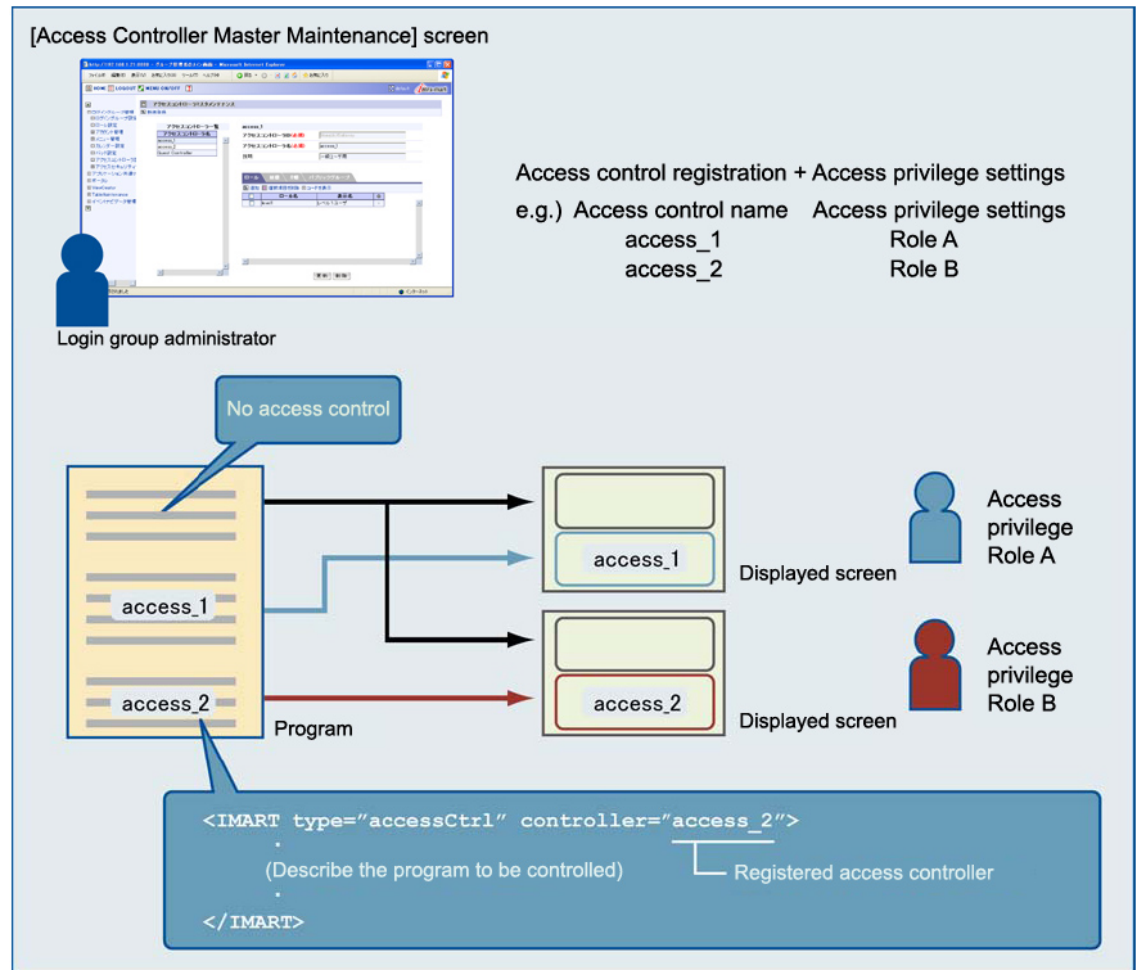


- For detail information on how to edit, refer to [1.5.3 Registering a User (Account Information and Profile Information)].



1.5.7 Access controller

The access controller is a mechanism to control access on each block in a program according to the access privileges of logged in users. Login as a user with login group administrator privileges, create "access controller" and grant appropriate access privileges in advance. Use the created "access controller" in a program as shown below to control the program.



<Concept of the access controller>

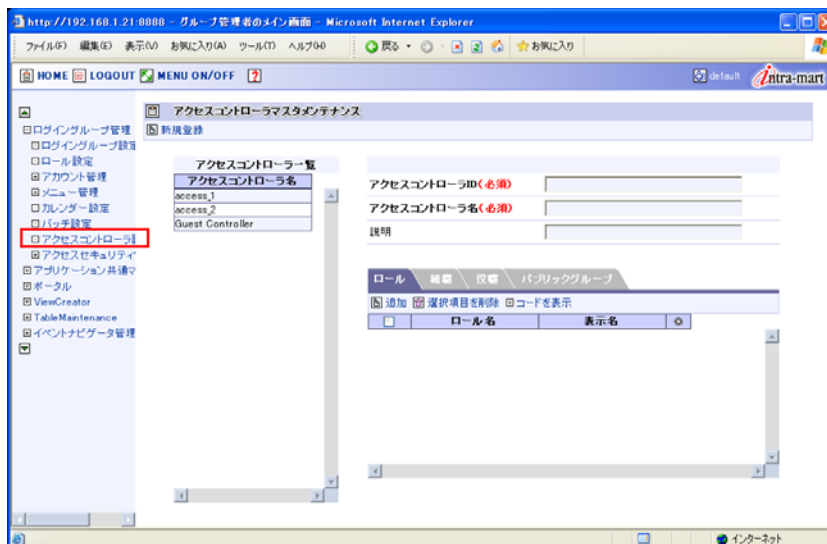


- If using a tag for an access controller which does not exist, the corresponding screen is not displayed to all users by default.
- To display the screen to all users, add the defaultShow attribute and set it to "true". Then create the corresponding access controller and grant the privileges to gain the normal control.
- For details of the access controller, refer to [Programming Guide] for im-Jssp and im-JavaEE Framework.

1.5.7.1 Creating an Access Controller

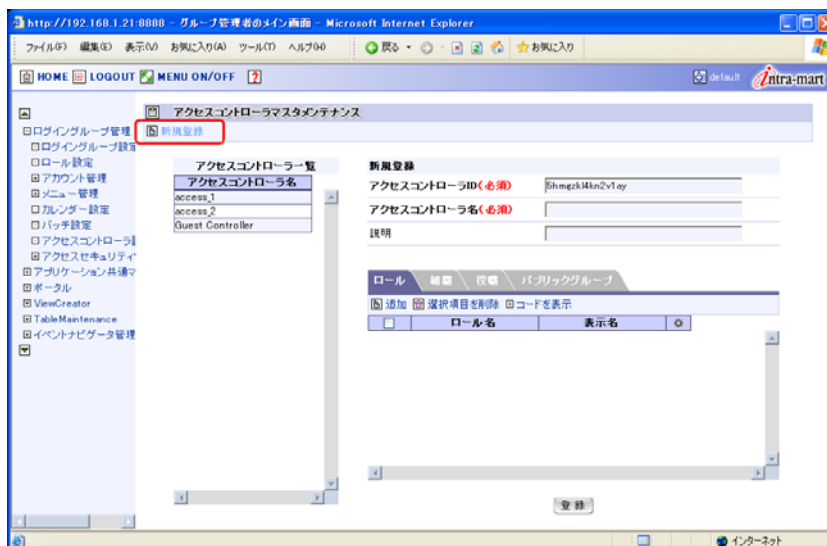
In order to set access privileges to part of a program using the access controller, first create an ID.

- 1 Click the [Access controller settings] from the [Login group administration].
The [Access controller master maintenance] screen is displayed.



<[Access controller master maintenance] screen>

- 2 Click [Add new] to create a new access controller, enter the access controller ID and access controller name.



<Select [Add new] and create an access controller>

Access controller ID (required)

Enter the access controller ID which is specified in a program. An automatically generated code is displayed as the default. It can be modified as required.

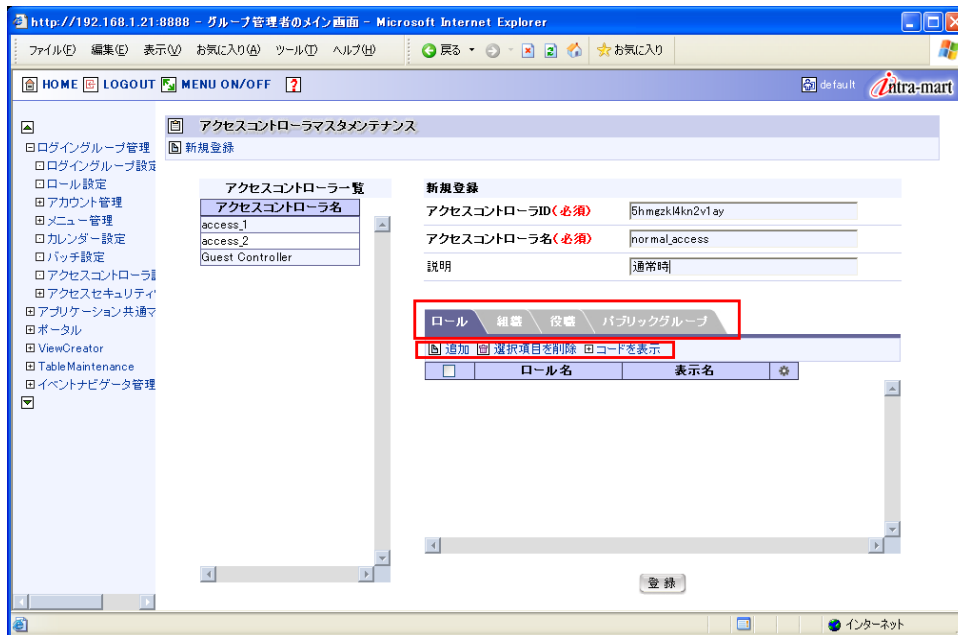
Access controller name (required)

Enter the name which is displayed in the list of access controllers on the setting screen.

Description

Enter the description of this access controller.

- 3 Set the access privileges by selecting tabs [Role], [Organization], [Job title], and [Public group].
Set access privileges with which the program containing the access controller ID you are creating runs.

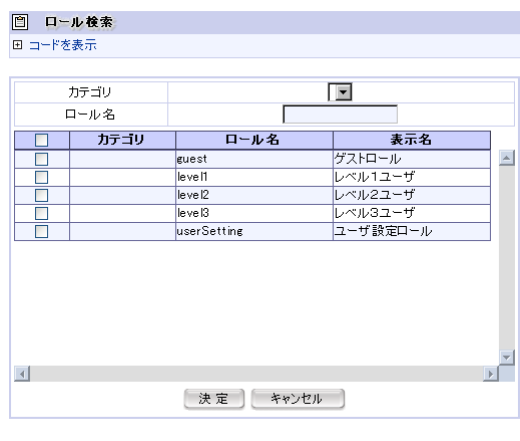


<Registering access privileges>

[Role] tab

Select roles to set access privileges on this access controller. Click the [Add] button to display the following [Role search] window that allows you to select from registered roles.

- Click the [Display code] to display codes of each role.
- Select a registered category from the [Category].
- Enter a search keyword in the [Role name] to display a list of roles which match the keyword.



[Organization] tab

Select organizations to set access privileges on this access controller. Click the [Add] button to display the following [Organization search] window that allows you to select organizations.

Click the [Display code] to display codes of each company and organization.

Organizations can be displayed either on the [List] or on the [Tree].

When selecting the [List] search, either [Code search] or [Name search] for the [Search target] can be selected.

Enter a search keyword in [Keyword] to display a list of organizations which match the keyword.

Click the [Search] button on the right once you have entered the search conditions.

組織検索

コードを表示

一覧 ツリー

検索対象

コード検索

名称検索

検索

キーワード

	組織名
<input type="checkbox"/>	サンプル会社
<input type="checkbox"/>	サンプル会社 / サンプル部門01
<input type="checkbox"/>	サンプル会社 / サンプル部門01 / サンプル課11
<input type="checkbox"/>	サンプル会社 / サンプル部門01 / サンプル課12
<input type="checkbox"/>	サンプル会社 / サンプル部門02
<input type="checkbox"/>	サンプル会社 / サンプル部門02 / サンプル課21
<input type="checkbox"/>	サンプル会社 / サンプル部門02 / サンプル課22

決定

キャンセル

[Job title] tab

Select job titles to set access privileges on this access controller. Click the [Add] button to display the following [Job title search] window that allows you to select job titles.

Click the [Display code] to display codes of each company and job title.

役職検索

コードを表示

会社名で絞り込み検索

役職名で絞り込み検索

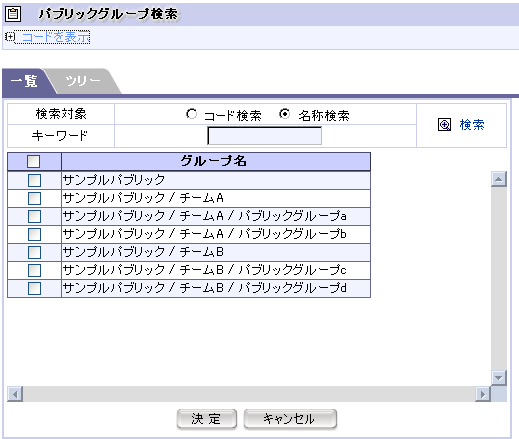
	会社名	役職名
<input type="checkbox"/>	サンプル会社	社長
<input type="checkbox"/>	サンプル会社	部長
<input type="checkbox"/>	サンプル会社	課長

決定

キャンセル

[Public group] tab

Select public groups to set access privileges on this access controller.
Click the [Add] button to display the following [Public group search] window that allows you to select public groups.
Click the [Display code] to display codes of each public group.
Public groups can be displayed either on the [List] or on the [Tree].
When selecting the [List] search, either [Code search] or [Name search] for the [Search target] can be selected.
Enter a search keyword in [Keyword] to display a list of public groups which match the keyword.
Click the [Search] button on the right once you have entered the search conditions.



[Add]

Adds access privileges related to the selected tab.

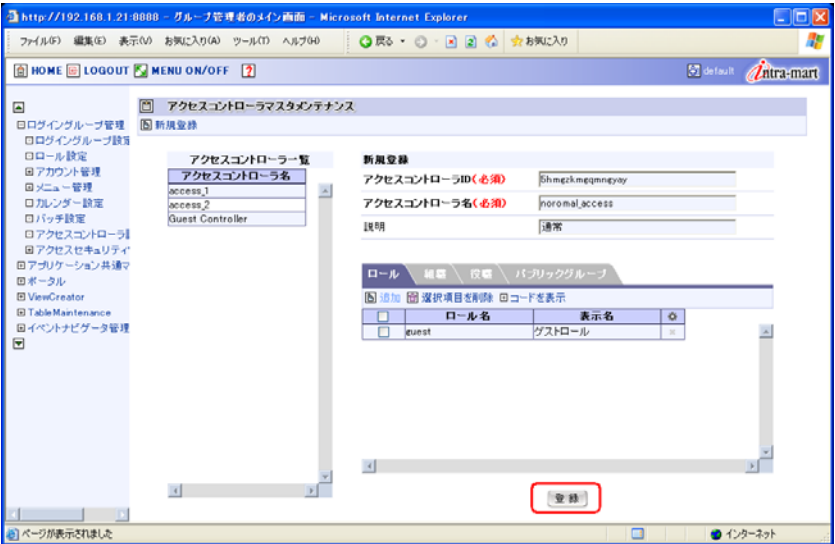
[Delete selection item]

Deletes the selected access privileges.

[Display code]

Displays the code column in the displayed list of access privileges.

4 Click the [Register] button once you have specified access privileges.
The access controller is registered and available to be used in programs.



<Registering an access controller>

[Register] button

Registers the entered access controller.



1.5.8 Importing Access Security

This screen can be used to import setting information which has been output by the access security export function. Enter the path to the file that you want to import, and click the [Import] button.

CSV format files are supported for importing account information. Specify the relative path from "storage" of the storage service to the import file.

項目	カテゴリ	ファイル
<input type="checkbox"/> ロール	standard	role.xml
<input type="checkbox"/> アカウント	csv	user_account.csv
<input type="checkbox"/> メニュー	standard	menu.xml
<input type="checkbox"/> カレンダー	standard	calendar.xml
<input type="checkbox"/> バッチ	standard	batch.xml
<input type="checkbox"/> アクセスコントロール	standard	access_controller.xml
<input type="checkbox"/> グループ管理権限ユーザメニュー	standard	admin_user_menu.xml
<input type="checkbox"/> Webサービスアクセス	standard	ws_access.xml

<[Import] screen of access security>



1.5.9 Exporting Access Security

This screen can be used to export setting information associated with access security. The exported setting information can be restored using the [Access Security Import]. Enter the destination path, and click the [Export] button. CSV format files are supported for exporting account information.

Also, UTF-16 format of XML files are supported. "Category: Standard (UTF-16)"

Specify the relative path from "storage" of the storage service to the export file.

項目	カテゴリ	ファイル
<input type="checkbox"/> ロール	standard	role.xml
<input type="checkbox"/> アカウント	csv	user_account.csv
<input type="checkbox"/> メニュー	standard	menu.xml
<input type="checkbox"/> カレンダー	standard	calendar.xml
<input type="checkbox"/> バッチ	standard	batch.xml
<input type="checkbox"/> アクセスコントロール	standard	access_controller.xml
<input type="checkbox"/> グループ管理権限ユーザメニュー	standard	admin_user_menu.xml
<input type="checkbox"/> Webサービスアクセス	standard	ws_access.xml

<[Export] screen of access security>

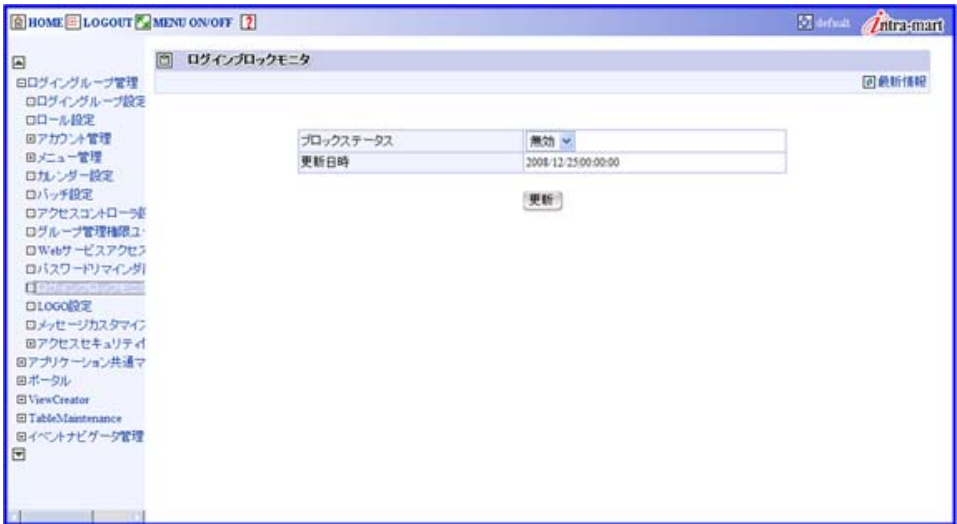


1.5.10 Controlling User Login

This screen can be used to control general users' login in the login group.
This screen also displays the current control status (login block is enabled/disabled).

If a user is already logged in, the login block takes effect at the user's next menu operation (when the user clicks a menu item).

The login control can be performed periodically by using "Login block" and "Clear login block" batch programs supplied as standard.



<[Login block monitor] screen to control login and to check the control status>

Block status	Displays the current login control status. Enabled: Login is blocked Disabled: The login block has been cleared
Updated date and time	Displays the date and time of the status update.
Update	Updates the login control status.

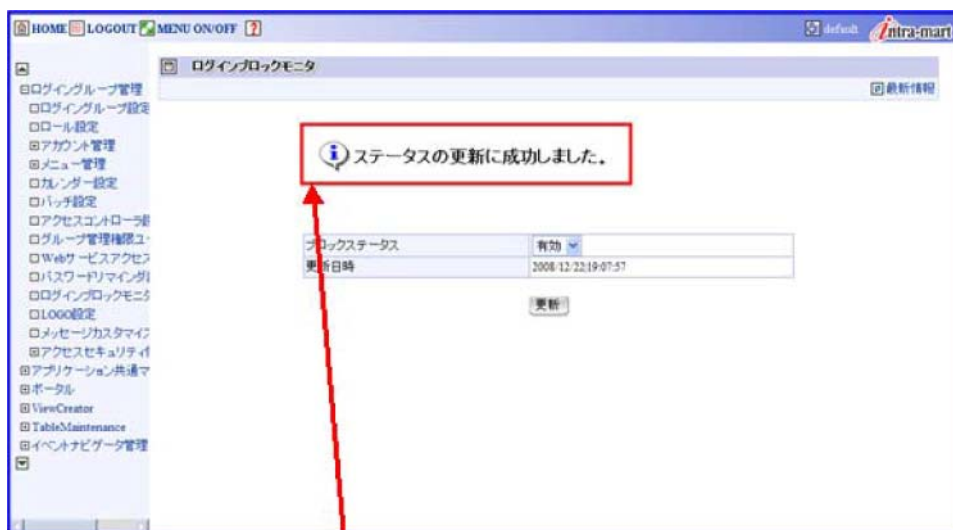


- Setting is immediately reflected by updating the block status.



1.5.10.1 Login Control from the Screen

- 1 Select [Login group administration] - [Login Block Monitor], set the block status to [Enabled], and click the [Update] button.



The update message is displayed.

The screen changes when the user attempts to login or clicks a menu item while login block is enabled.



<The screen displayed when the user has attempted to login or carried out a menu operation while login block is enabled>

- 2 To clear login block settings, select [Login group administration] - [Login Block Monitor], set the block status to [Disabled], and click the [Update] button.



1.5.10.2 Login Control from a Batch

The login control can be performed periodically by selecting [Login group administration] - [Batch Settings] and enabling the following batch programs.

Login block batch

Batch ID	loginBlockage
Batch name	Login block
Executable program language	JavaScript
Executable program path	system/setting/group/login_blockage/login_blockage

Clear login block

Batch ID	loginBlockageRelease
Batch name	Clear login block
Executable program language	JavaScript
Executable program path	system/setting/group/login_blockage/login_blockage_release



1.5.10.3 Login Control Log

Login block and clearing login block operations are output to a log.

■ Log output destination and log level

The following describes the log output destination and log level.

Output path	Security log (log/platform/security.log)
Log level	INFO



- The default log level for the security log (log/platform/security.log) is set to "ERROR" by default; therefore, you need to modify the log level to "INFO" in the log setting file (im_logger_security.xml) to output the login control log.

■ Log messages

The following messages are output as the login control log.

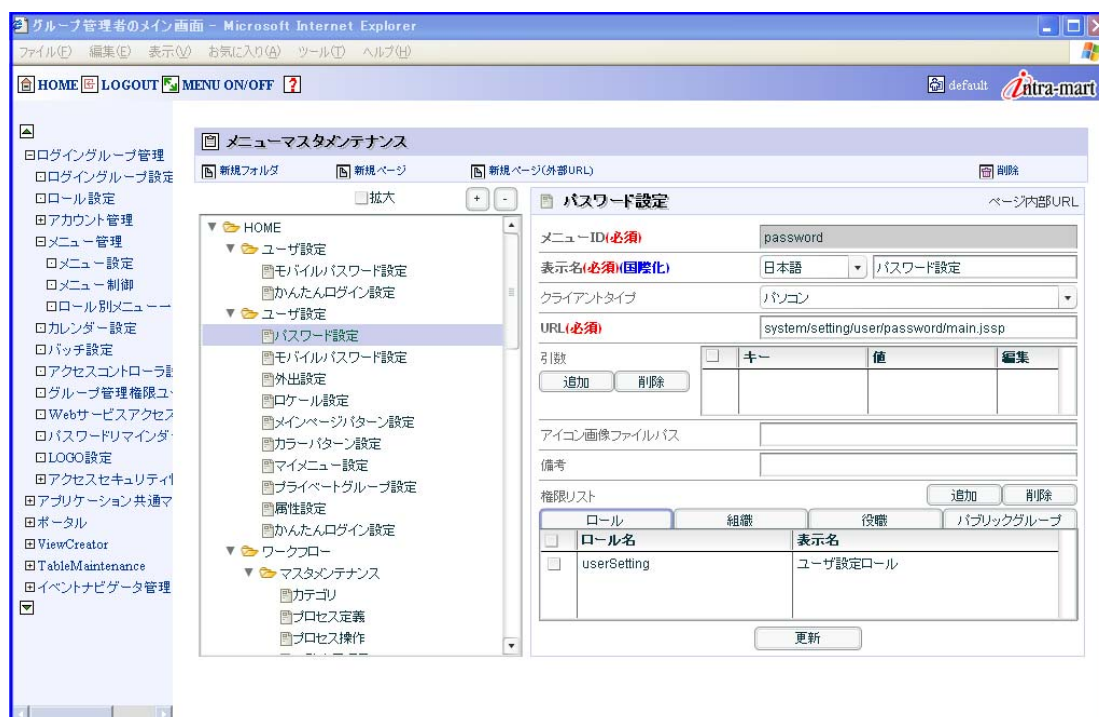
Message	
A login block has been started.[Group]	While login block is enabled
The login block has been cleared.[Group]	While login block is disabled

1.6 Menu Settings

The menu settings screen can be used to set menus displayed on user screens. This screen allows you to add, delete, and update folders and pages which are displayed on the menu. It is possible to control which users can see which folders and pages by setting access privileges on them. For detail information for access security, refer to [1.5 Access Security Administration].



- Menus can be set in different ways: from menu settings described in the first half of this section, from [List of menus by role] which displays the menu set on each role, or from [Menu control] for menu operational management.

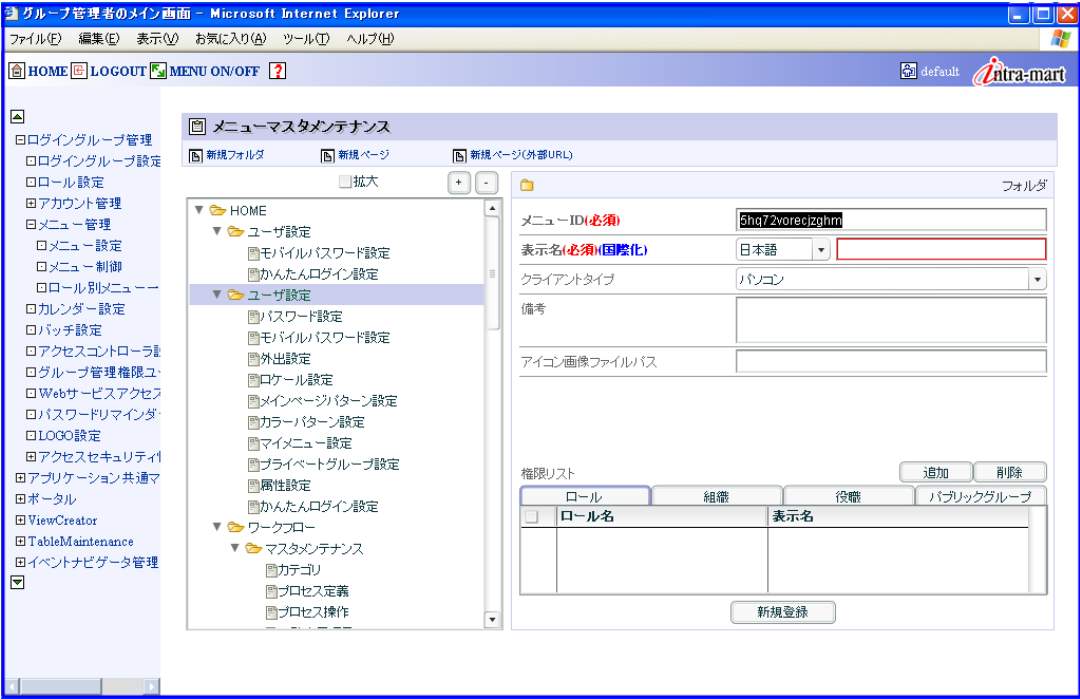


<Screen for setting a menu for general users>



1.6.1 Creating a New Folder

Click the [New folder] icon in the upper part of the screen to create a new folder in a menu. A new folder is created under the folder or page which is currently selected in the tree. The registration position can be changed by dragging the folder on the tree. For changing the registration position, refer to [1.6.5 Changing the Display Order of Folders and Pages]. To register changed settings, click the [Add new] button in the lower part of the screen.



<Creating a new folder>

Menu ID (required)

Enter the folder ID you are creating. An automatically assigned code is displayed as the default.

Display name (required, locale)

When creating a folder, it is required to register the folder name for all registered locales. First, select the locale for the folder name.

Display name (required, name)

Enter the folder name for the selected locale. The string entered here will be displayed in the menu. When using multiple languages as locales, enter the folder name in all languages.

Client type

Select if the menu is for PCs or mobile devices. Specify if this folder is displayed for access from PCs or access from mobile environment such as a mobile device.

Remarks

Enter remarks on the folder.

Icon image file path

Enter the path to the icon which is displayed at the top of the menu.

[Role] tab

Select roles to grant access privileges on this folder. Enter the start date and end date of the role. Click the [Add] button to display the window below, which allows you to select from registered roles. The codes of each role can be displayed in this window.

ロール検索

カテゴリ

ロール名

☐ コード表示

<input type="checkbox"/>	カテゴリ	ロール名	表示名
<input type="checkbox"/>		bpwsuper	ワークフロー管理者
<input type="checkbox"/>		guest	ゲストロール
<input type="checkbox"/>		level1	レベル1ユーザ
<input type="checkbox"/>		level2	レベル2ユーザ
<input type="checkbox"/>		level3	レベル3ユーザ
<input type="checkbox"/>		userSetting	ユーザ設定ロール

決定 キャンセル

[Organization] tab

Select organizations to grant access privileges on this folder. Click the [Add] button to display the window below, which allows you to select organizations. Organizations can be displayed either on the [List] or on the [Tree]. The codes of companies and organizations can be displayed in this window.

組織検索

一覧 ツリー ☐ コード表示 ☐ 拡大

検索対象 ☐ コード検索 ☒ 名称検索

キーワード 検索

<input type="checkbox"/>	組織名
<input type="checkbox"/>	サンプル会社
<input type="checkbox"/>	サンプル会社 / サンプル部門01
<input type="checkbox"/>	サンプル会社 / サンプル部門01 / サンプル課11
<input type="checkbox"/>	サンプル会社 / サンプル部門01 / サンプル課12
<input type="checkbox"/>	サンプル会社 / サンプル部門02
<input type="checkbox"/>	サンプル会社 / サンプル部門02 / サンプル課21
<input type="checkbox"/>	サンプル会社 / サンプル部門02 / サンプル課22

決定 キャンセル

[Job title] tab

Select job titles to grant access privileges on this folder. Click the [Add] button to display the window below, which allows you to select job titles. The codes of companies and job titles can be used in this window.

役職検索

会社名で絞り込み検索

役職名で絞り込み検索

☐ コード表示

<input type="checkbox"/>	会社名	役職名
<input type="checkbox"/>	サンプル会社	社長
<input type="checkbox"/>	サンプル会社	部長
<input type="checkbox"/>	サンプル会社	課長

決定 キャンセル

[Public group] tab

Select public groups to grant access privileges on this folder. Click the [Add] button to display the window below, which allows you to select public groups. Public groups can be displayed either on the [List] or on the [Tree]. The codes of each public group can be displayed in this window.

パブリックグループ検索

一覧 ツリー ☐ コード表示 ☐ 拡大

検索対象 ☐ コード検索 ☒ 名称検索

キーワード 検索

<input type="checkbox"/>	グループ名
<input type="checkbox"/>	サンプルパブリック
<input type="checkbox"/>	サンプルパブリック / チームA
<input type="checkbox"/>	サンプルパブリック / チームA / パブリックグループa
<input type="checkbox"/>	サンプルパブリック / チームA / パブリックグループb
<input type="checkbox"/>	サンプルパブリック / チームB
<input type="checkbox"/>	サンプルパブリック / チームB / パブリックグループc
<input type="checkbox"/>	サンプルパブリック / チームB / パブリックグループd

決定 キャンセル



1.6.2 Creating a New Page

Click the [New page] icon in the upper part of the screen to create a new page in a menu. A new page is created under the folder or page which is currently selected in the tree. The registration position can be displayed by dragging the page on the tree. For changing the registration position, refer to [1.6.5 Changing the Display Order of Folders and Pages]. Click the [Add new] button in the lower part of the screen to register.

The screenshot shows the 'Menu Maintenance' form in the Intra-mart Group Management interface. The form is titled 'メニューメンテナンス' and has tabs for '新規フォルダ', '新規ページ', and '新規ページ(外部URL)'. The '新規ページ' tab is active. The form contains the following fields and sections:

- メニューID(必須)**: A text field with the value '5hg72vphjxy3thm'.
- 表示名(必須)(国際化)**: A dropdown menu set to '日本語'.
- クライアントタイプ**: A dropdown menu set to 'パソコン'.
- URL(必須)**: A text field.
- 引数**: A table with columns 'キー', '値', and '編集'. It has buttons '追加' and '削除'.
- アイコン画像ファイルパス**: A text field.
- 備考**: A text field.
- 権限リスト**: A table with columns 'ロール', '組織', '役職', and 'パブリックグループ'. It has buttons '追加' and '削除'.
- 新規登録**: A button at the bottom right.

<Creating a new page>

Menu ID (required)

Enter the page ID you are creating. An automatically generated code is displayed as the default. It can be modified as required.

Display name (required, locale)

When creating a page, register the page name for all registered locales. First, select the locale for the page name.

Display name (required, name)

Enter the page name for the selected locale. The string entered here will be displayed in the menu. When using multiple languages as locales, enter the page name in all languages.

Client type

Select if the menu is for PCs or mobile environment. Specify if this page is displayed for access from PCs or access from mobile environment such as a mobile device.

URL (required)

Enter the URL of the page you want to display.

When the URL is for a script development model, specify a relative path from "pages" and add an extension ".jsp" at the end. Otherwise, specify a relative path from the context path.

Argument

If there are any required arguments for launching the page, click the [Add] button to register them. The registered arguments can be updated and deleted any time.

Icon image file path

Enter the path to the icon which is displayed at the top of the menu.

Remarks

Enter remarks on the page.

[Role] tab

Select roles to grant access privileges on this page. Enter the start date and end date of the role. Click the [Add] button to display the window below, which allows you to select from registered roles. The codes of each role can be displayed in this window.

ロール検索

カテゴリ

ロール名

☐コード表示

<input type="checkbox"/>	カテゴリ	ロール名	表示名
<input type="checkbox"/>		bpwsuper	ワークフロー管理者
<input type="checkbox"/>		guest	ゲストロール
<input type="checkbox"/>		level1	レベル1ユーザ
<input type="checkbox"/>		level2	レベル2ユーザ
<input type="checkbox"/>		level3	レベル3ユーザ
<input type="checkbox"/>		userSetting	ユーザ設定ロール

決定

キャンセル

[Organization] tab

Select organizations to grant access privileges on this page. Click the [Add] button to display the window below, which allows you to select organizations. Organizations can be displayed either on the [List] or on the [Tree]. The codes of companies and organizations can be displayed in this window.

組織検索

一覧

ツリー

☐コード表示

☐拡大

検索対象

☐コード検索

☒名称検索

キーワード

検索

<input type="checkbox"/>	組織名
<input type="checkbox"/>	サンプル会社
<input type="checkbox"/>	サンプル会社 / サンプル部門01
<input type="checkbox"/>	サンプル会社 / サンプル部門01 / サンプル課11
<input type="checkbox"/>	サンプル会社 / サンプル部門01 / サンプル課12
<input type="checkbox"/>	サンプル会社 / サンプル部門02
<input type="checkbox"/>	サンプル会社 / サンプル部門02 / サンプル課21
<input type="checkbox"/>	サンプル会社 / サンプル部門02 / サンプル課22

決定

キャンセル

[Job title] tab

Select job titles to grant access privileges on this page. Click the [Add] button to display the window below, which allows you to select job titles. The codes of companies and job titles can be displayed in this window.

役職検索

会社名で絞り込み検索

役職名で絞り込み検索

☐コード表示

<input type="checkbox"/>	会社名	役職名
<input type="checkbox"/>	サンプル会社	社長
<input type="checkbox"/>	サンプル会社	部長
<input type="checkbox"/>	サンプル会社	課長

決定

キャンセル

[Public group] tab

Select public groups to grant access privileges on this page. Click the [Add] button to display the window below, which allows you to select public groups. Public groups can be displayed either on the [List] or on the [Tree]. The codes of each public group can be displayed in this window.

パブリックグループ検索

一覧ツリー

☐コード表示☐拡大

検索対象

☐コード検索☒名称検索

キーワード

検索

☐グループ名

☐サンプル/パブリック

☐サンプル/パブリック/チームA

☐サンプル/パブリック/チームA//パブリックグループa

☐サンプル/パブリック/チームA//パブリックグループb

☐サンプル/パブリック/チームB

☐サンプル/パブリック/チームB//パブリックグループc

☐サンプル/パブリック/チームB//パブリックグループd

決定

キャンセル



1.6.3 Creating a New Page (External URL)

Click the [New page (external URL)] icon in the upper part of the screen to add an external URL as a new page in a menu. For operational details, refer to [1.6.2 Creating a New Page].

Note that the URL must include the protocol for creating a new page.

e.g., `http://[hostname]:[port]/.....`



1.6.4 Updating and Deleting a Folder or a Page

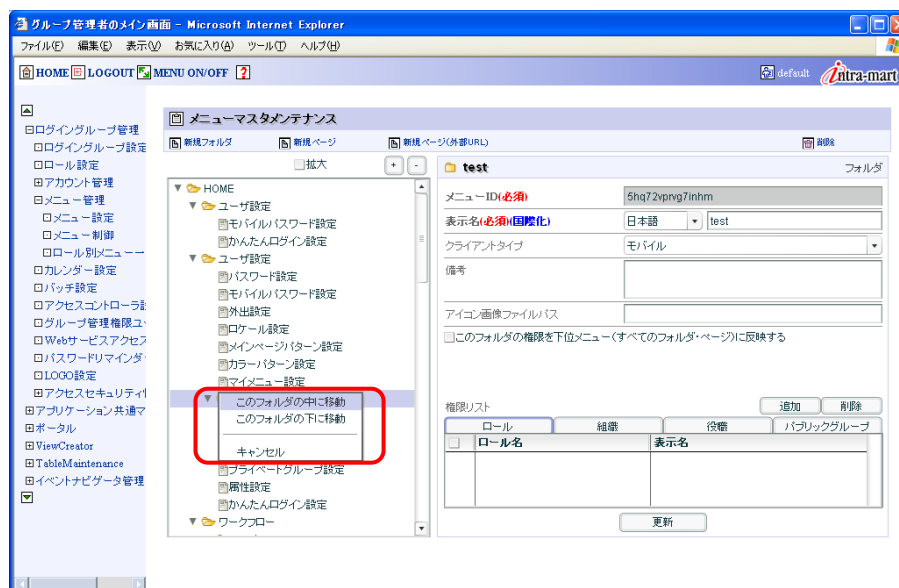
In order to update or delete an existing folder or page, first select the folder or page on the tree. The detailed information is displayed on the right. Change the information as required. Click the [Update] button to reflect the changes. To delete a folder or page, click the [Delete] icon while the folder or page is selected.



1.6.5 Changing the Display Order of Folders and Pages

The display order of the existing folders and pages can be changed by dragging them to the desired position on the folder tree (view). When you drop them on a page icon, the dragged item is moved under the page.

When you drop it on a folder icon, a menu is displayed to ask whether to move the dragged item in the folder or under the folder.



<An example of dragging a folder to another folder>



1.6.6 Setting a Menu for Each Role

[Login group administration] - [Menu administration] - [List of menus by role] is a function to display a list of menus for each registered role. The menu edit screen can be displayed by selecting from the list.



- Note this screen displays a list of menus which are set with given roles and is not a list of menus which are displayed on the screens of users with given roles.
For detail information on the list of menus for user screens, refer to [1.6.7 Setting a Menu for Each User].

1

Select [Login group administration] - [Menu administration] - [List of menus by role].
A list of registered roles is displayed.



2

Click a role name.
Menus with the selected role are displayed.



- 3 Click a displayed menu name.
A menu edit screen is displayed. Edit items such as privileges set to the menu as needed.

http://192.168.1.21:8888 - メニュー編集 - Microsoft Internet Explorer

メニュー編集

プロセス定義

ページ内部URL

メニューID(必須) impexp-process-def

表示名(必須)(国際化) 日本語 プロセス定義

クライアントタイプ パソコン

URL(必須) bpw-export_list_for_manage_frame_call.service

追加 削除

キー	値	編集
caller	menu	編集

アイコン画像ファイルパス

備考

権限リスト

追加 削除

ロール	組織	役職	パブリックグループ
ロール名		表示名	
bpwsuper		ワークフロー管理者	

更新

ページが表示されました

インターネット



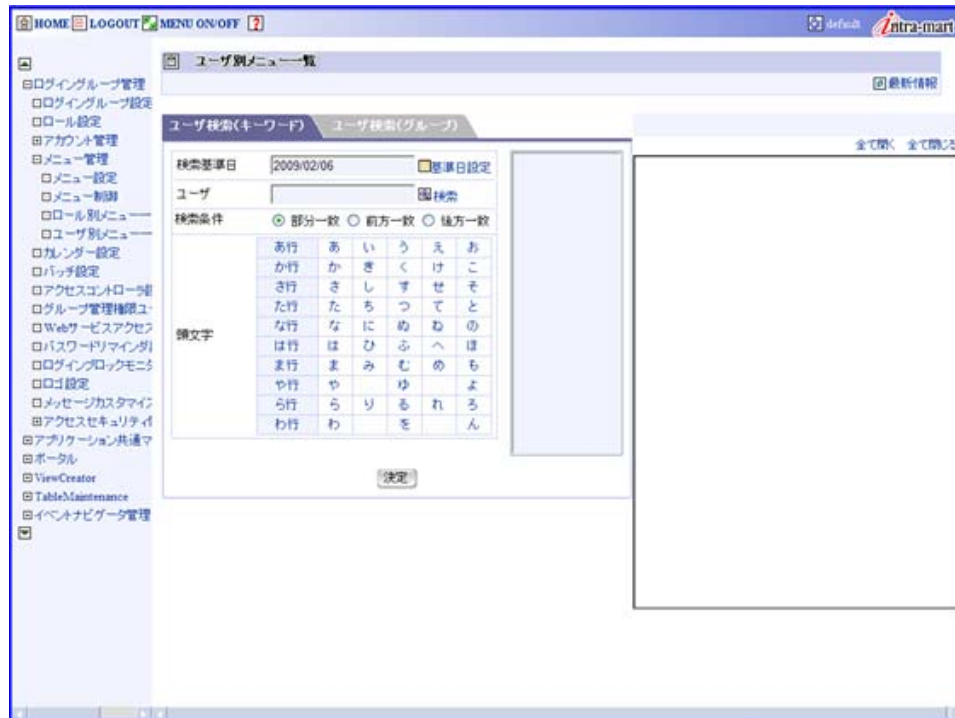
- For detail information on how to operate, refer to [1.6 Menu Settings].



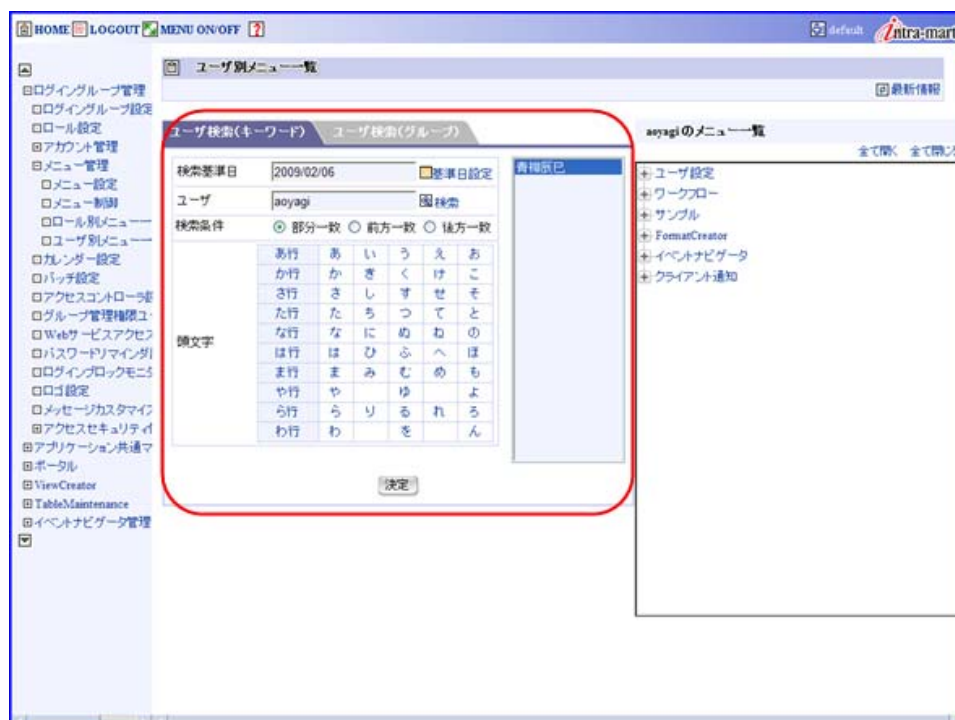
1.6.7 Setting a Menu for Each User

[Login group administration] - [Menu administration] - [List of menus by user] is a function to display a list of menus for each registered user. The menu edit screen can be displayed by selecting from the list.

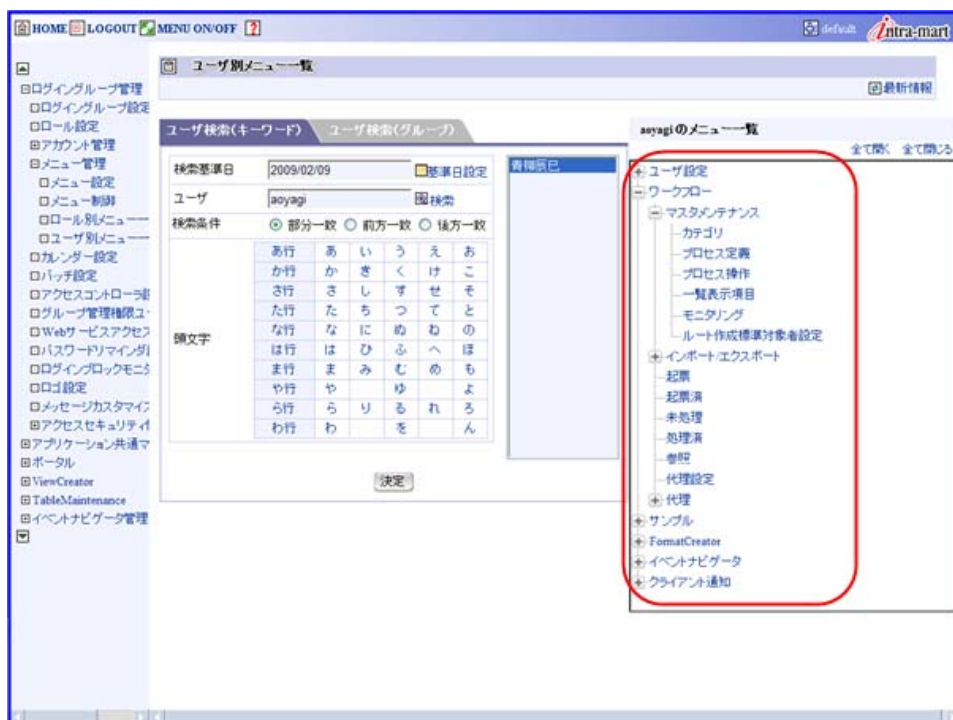
- 1 Select [Login group administration] - [Menu administration] - [List of menus by user].



- 2 Search for the required user using the [User search (keyword)] tab or the [User search (group)] tab, and select the user.
A list of menus for the specified user is displayed.



3 Click a menu item from the displayed list of menus (menu tree) for the user.



4 A menu edit screen is displayed. Edit items such as privileges set to the menu as needed.



● For detail information on how to operate, refer to [1.6 Menu Settings].



1.6.8 Changing the Menu Operational Status

The menu operational status can be switched between Started and Stopped using [Login group administration] - [Menu administration] - [Menu control]. Menu items whose operation is stopped are displayed on user menus, but the corresponding screens are not displayed until the operation is started again. When these items are clicked, an error screen is displayed.

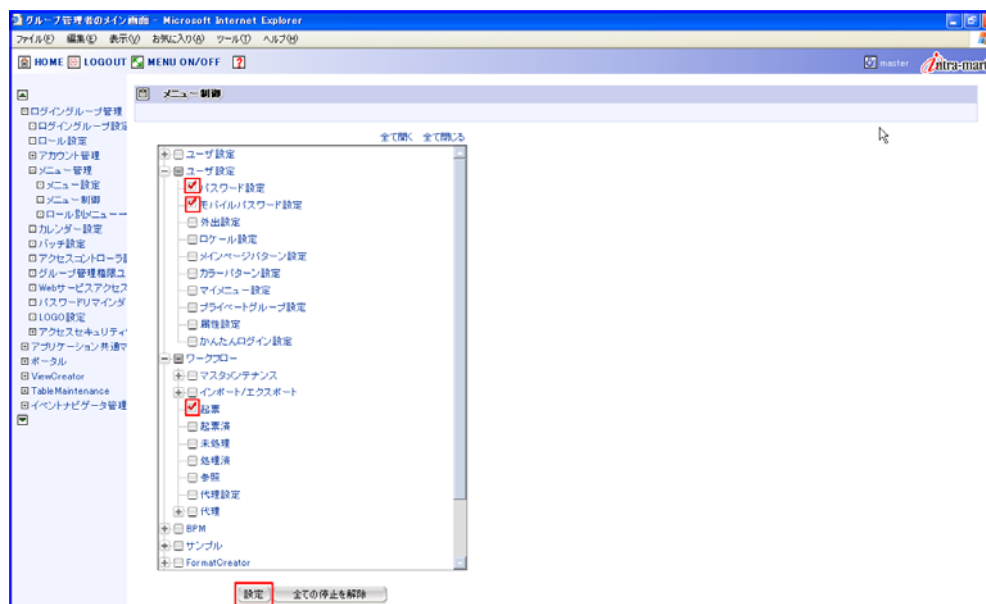
For details on settings for this function, refer to [Access Security Specifications].

- 1 Select [Login group administration] - [Menu administration] - [Menu control].
The user menu tree is displayed.

(In the following screen, all menu items are in operation)

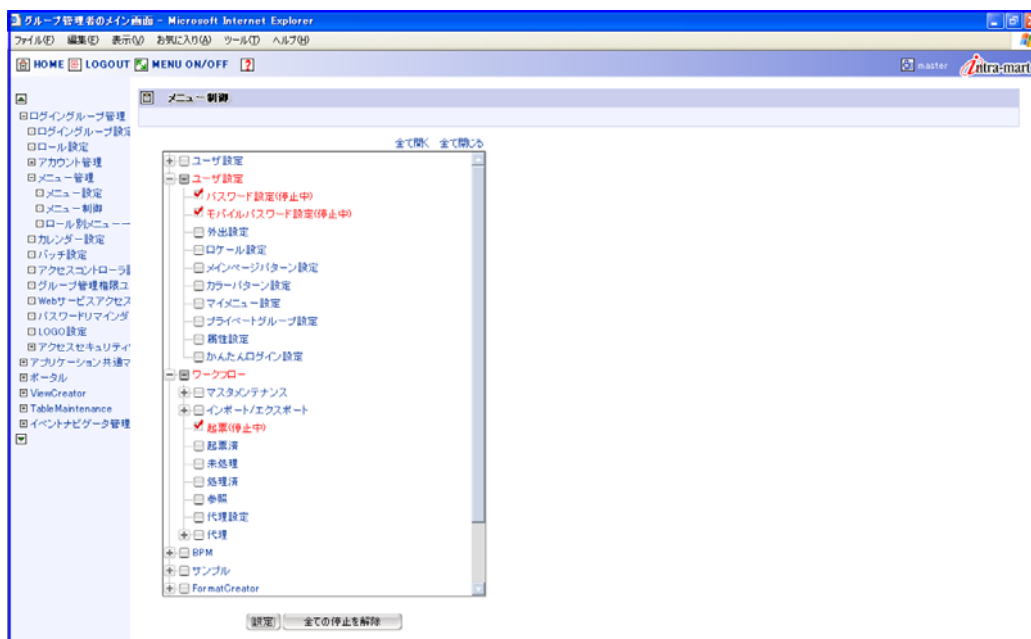


- 2 Select the check box of menu items to stop their operation, and click the [Set] button.



3 After they are set, menu items whose status is stopped are displayed as "menu_display_name (Stopped)" in red.

Also, the name of the folder which contains the stopped menu is displayed in red.



An error screen is displayed when a user clicks a stopped menu item.



<An example of the error screen when a stopped menu item is clicked>

4 To restart the operation, clear the check box of the given menu item and click the [Set] button.
To start all the stopped menu items, click the [Clear all stopped] button.

1.7

Registering Developed Application Software

This section describes the registration procedure for running developed application software (a set of a presentation page and function container for a script development model, JSP or a Servlet for a JavaEE development model) from intra-mart menu screens.

The following illustrates the registration flow of application software.

1 Saving the application

2 Registering the folder

3 Registering the page

4 Setting access security (roles)

5 Login again

<Application software registration procedure>

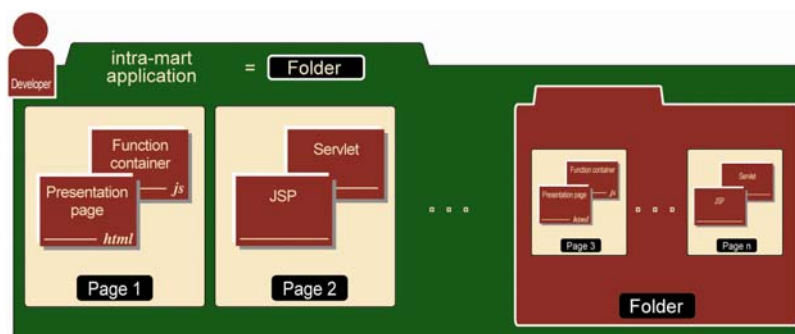


- The necessary user registrations and role (access privileges) settings should have been carried out before registering application software.
- For operations required for access security settings on pages, refer to [1.5 Access Security Administration].



1.7.1 Folders and Pages

Developed application software is registered into a folder in intra-mart. Therefore, general application software is comprised of a "folder" and multiple "pages" in the folder. Each "page" represents a set of a presentation page (HTML file) and function container (JavaScript file) in a script development model, and JSP (JSP file) or a Servlet (Java class file) in a JavaEE development model. Folders and pages can be placed on any hierarchical levels in the menu tree in intra-mart.



<Concept of folders and pages>

- Application software built with the intra-mart WebPlatform or intra-mart AppFramework is based on the menu structure built on this folder/page framework. This menu structure enables the application software to take advantage of the access security function.



1.7.2 Registering Application Software

1 Save application software

Save all files associated with the developed application software in a designated location.

Files for a script development model Save in the "%Resource service%/pages/" directory
Files for a JavaEE development model Save in the "%Application Runtime%/doc/" directory

2 Register a "folder"

Select [Login group administration] - [Menu administration] - [Menu settings] and register a new folder. For detail information on how to register a folder, refer to [1.6 Menu Settings].

3 Register a "page"

Register a page in the same manner as the folder. For detail information on how to register a page, refer to [1.6 Menu Settings].



- <Specifying the path>
- Script development model
A relative path (extension ".jsp") from "intra-mart_installation_folder/pages".
- When registering your own Servlet or JSP to a page without using the JavaEE framework (im-Framework), assuming the URL of intra-mart is http://hostname:port/imart/intramart:
 - (1) If beginning with "/",
specifying "/hello" calls "http://hostname:port/hello".
 - (2) If there is an extension at the end of the path,
specifying "hello.jsp" calls "http://hostname:port/imart/hello.jsp".
 - (3) If including "://",
specifying "http://abc/hello.jsp" calls "http://abc/hello.jsp".
- When registering application software created with the JavaEE framework (im-Framework) to a page
URL: XXXX-YYYY.service
Application ID : XXXX
Service ID : YYYY
(For "XXXX" and "YYYY" sections, refer to [im-JavaEE Framework Programming Guide].)

4 Login again

After "folder" or "page" related master maintenance operations, log in again. The user can run the registered application software if the user's access privileges to registered folders and pages are correctly set.



- For operations required for security settings on pages, refer to [1.5 Access Security Administration].
- For operations for [Import/Export], refer to [1.5.8 Importing Access Security] and [1.5.9 Exporting Access Security].

1.8

Application Common Master

Organization, group, and user information management

Masters commonly used in system integration such as company data, organization data, and group data are provided as standard. These master data are shared among intra-mart application software series. Also, APIs to access the table structure of these masters are publicly released and freely available for system integration. For details, refer to the [Application Common Master Specifications].

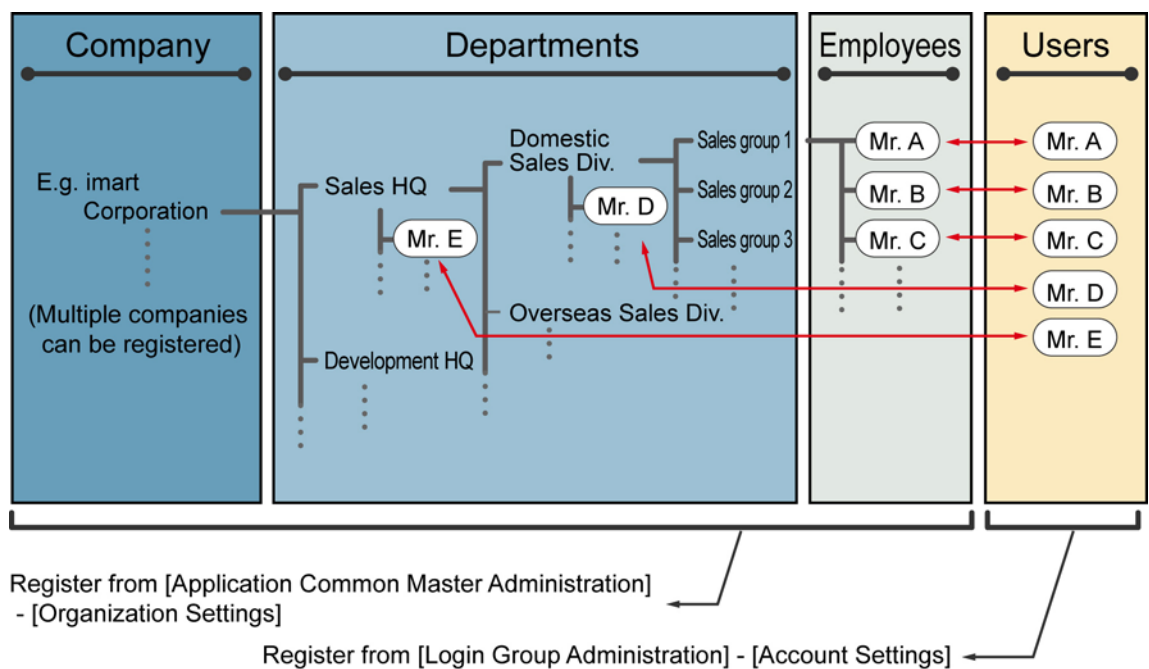


1.8.1 Setting an Organization [Application common master administration] - [Organization settings]

The intra-mart uses organizations in various places throughout its operations. For example, organizations are used to set access privileges. Also, organizations can be used when creating application software which runs on intra-mart.

When setting an organization, first register a company, and register organization elements such as divisions, departments, and groups in the company. These organization elements can form a hierarchical structure.

Employees (users) can be registered to any organization elements of any hierarchical levels, and a user can be a member of multiple organization elements (concurrent office). Employees are registered by relating users with the registered "profile" using [Login group administration] - [Account settings].

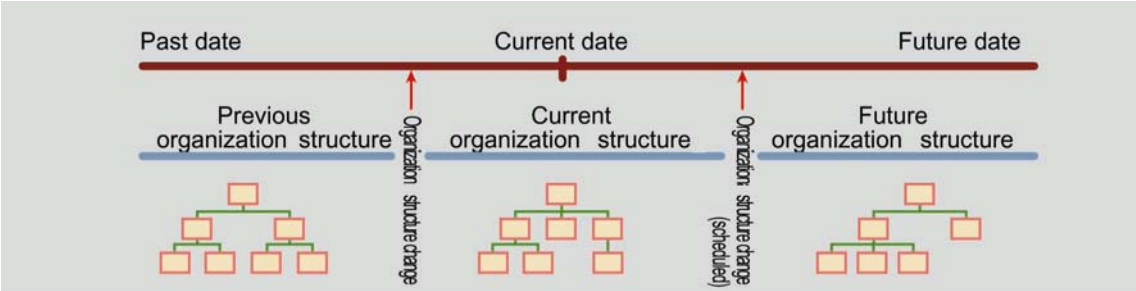


- Registering a company
 - Multiple companies can be registered in [Organization settings]. Register organization elements such as divisions and departments, and employees for each company as needed.
- An intranet system can be expanded to a full scale BtoB system by registering multiple companies including subsidiaries, partner companies, suppliers, and customer companies.



1.8.1.1 Organization Period Management

Generally, organization structure changes as the time goes by and a structure registered in intra-mart should be updated. In some application software, problems may arise when updating a structure. For example, assume application software with a workflow needs to process a back-dated transaction for some reason. By this time, the organization structure has already been updated in intra-mart; therefore, an application with a past date cannot be approved by the superior in a current structure. The same applies on future-dated transactions. Also, applications submitted before an organization structure change may find their concerned organization elements no longer exist afterwards. In order to provide a solution for such problems, intra-mart can preserve the entire history of the organization structure. The function to manage this organization structure history is "Period management".



<Organization period management>



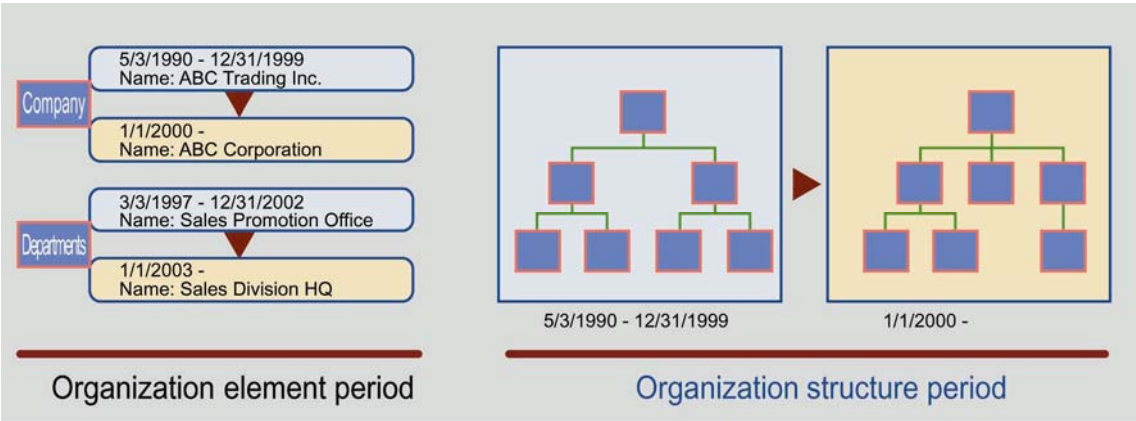
- For detail information on the period of validity, refer to the column [Handling of the End Date of the Period of Validity] (p. 20).



1.8.1.2 "Organization Element Period" and "Organization Structure Period"

Company names, division names, and department names change as the time goes by. The period management records the information for a certain period each time a change occurs. Therefore, application software can be designed to process a past or future transaction using the information of the corresponding period from the accumulated history.

Each item of "organization element" information has its own change history. These individual change histories are collectively called the "organization element period". In addition, there is a concept of the "organization structure period". This period management applies on the hierarchical information of an organization structure.



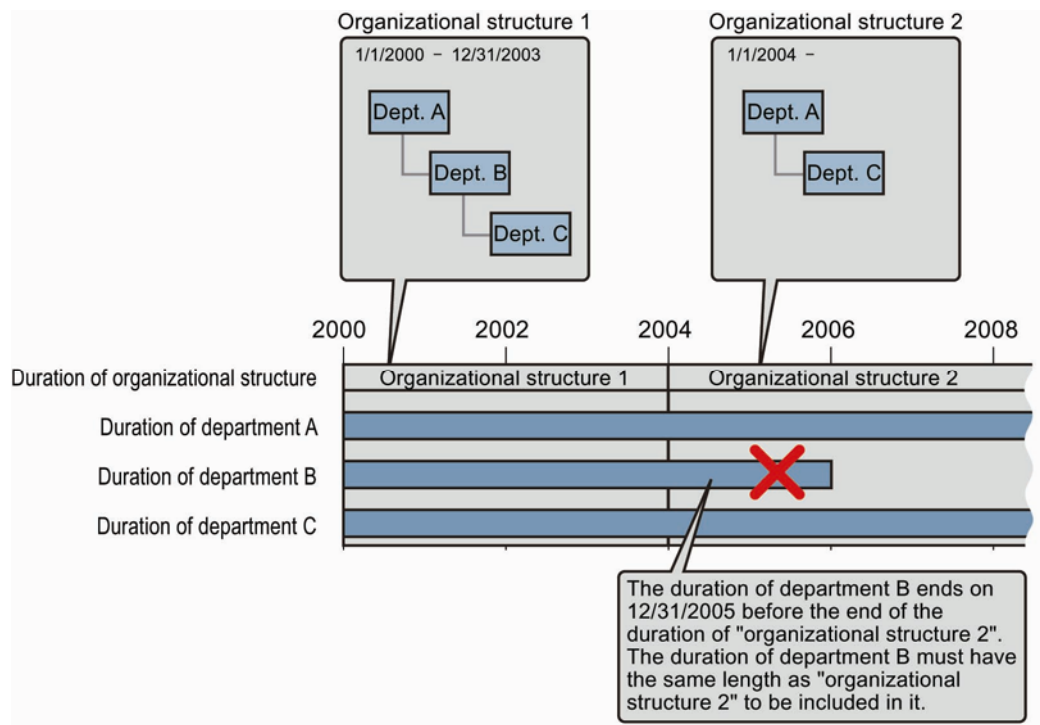
<Two elements in period management: Difference between "organization element" and "organization structure">



1.8.1.3 Relationships between "Organization Element Period" and "Organization Structure Period"

The "organization element period" and "organization structure period" are closely related. Because there must not be inconsistencies between the periods in "organization elements" and periods in the "organization structure" which is the hierarchical representation of the organization elements.

Assuming "organization structure 2" is created as in the following diagram, each organization element (department A to C) must have the same duration of period as the "organization structure 2" to be in the structure. Therefore, the department B cannot be in the "organization structure 2" because its duration is shorter as shown in the diagram.



Column

Registering an Organization without Using Period Management

If there is no need for period management, set all periods to the same length (with any value). As long as you set all organization elements and structures in the same period, you will not have problems such as the above case where you cannot register due to an inconsistency. The end date can be left blank.

Strict period management is necessary only where you create or use application software which requires such control.



1.8.1.4 Structure of Organization Settings Screen

This section describes how to register an organization structure using period management. There are two main screens in [Application common master administration] - [Organization settings] for different purposes.

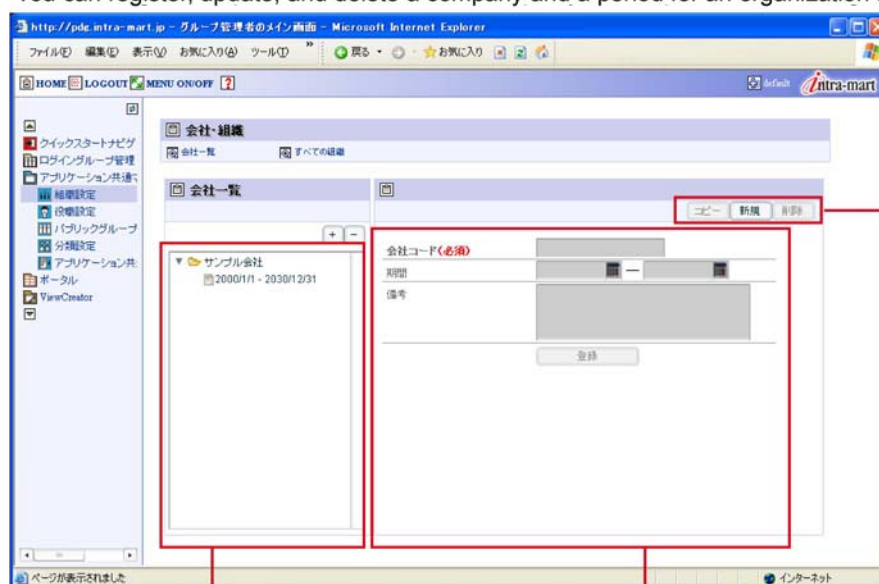
List of companies

The list of companies is the initial screen when you select [Application common master administration] - [Organization settings]. This screen allows you to register and delete a company, and register, update, and delete "organization structure periods" for a company. When you register a company, set the start date for the period as the current date and leave the end date blank. If there is any organization structure change at a later date, enter the end date of the initial organization structure and add the new organization structure which starts from the following day.

Although it is possible to register a company from this screen, the registration is purely for creating a company for the sake of registering the period of an organization structure. Therefore, it is required to register attribute information such as the company name from the [List of organizations] screen since a company is also an organization.

The initial screen for [Application Common Master Administration] - [Organization settings].

You can register, update, and delete a company and a period for an organization structure at this screen.



[New], [Copy], and [Delete] buttons

You can register and delete a company, and add, delete, and copy a period of an organization structure.

List of organization structure periods

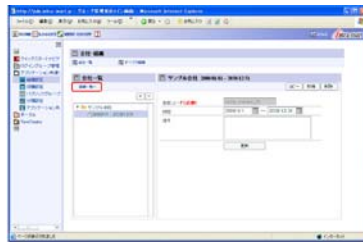
The company name and a list of organization structure periods are displayed. The displayed company name is the one which is valid at the current time of the system clock.

Company and organization structure period details

You can register a new company, add and update an organization structure period and its details

List of organizations

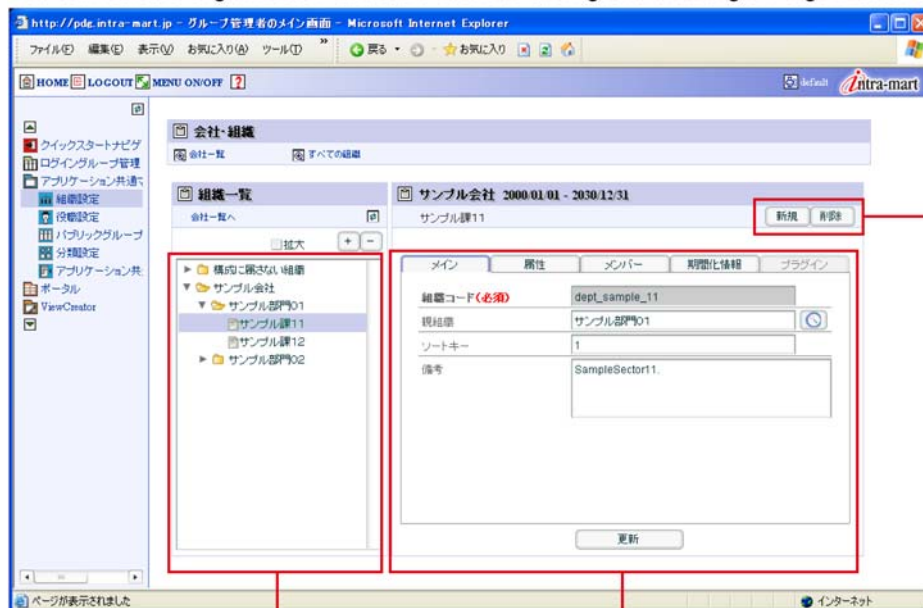
Use this screen to register, update, and delete organization structures and organization elements of the company selected from the list of companies.



Select an organization structure period in the [List of Companies] screen and click [To list of organizations].

Organization structure screen of the selected company.

You can edit the organization structure such as adding and deleting an organization element.



[New] and [Delete] buttons

You can add or delete an organization element.

Organization structure tree

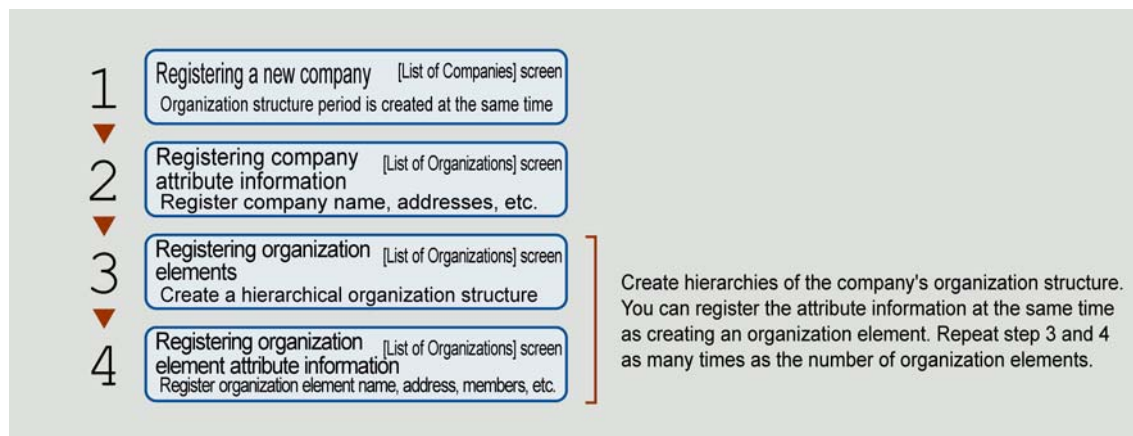
A hierarchical representation of the organization structure. Displayed names of organization elements are ones which are valid on the start date of the organization structure period.

Organization element details

You can set attribute information of the organization element for each period and each language.

1.8.1.5 Adding a New Company

This section describes a general operation procedure for new organization settings.



<Flow of organization settings>

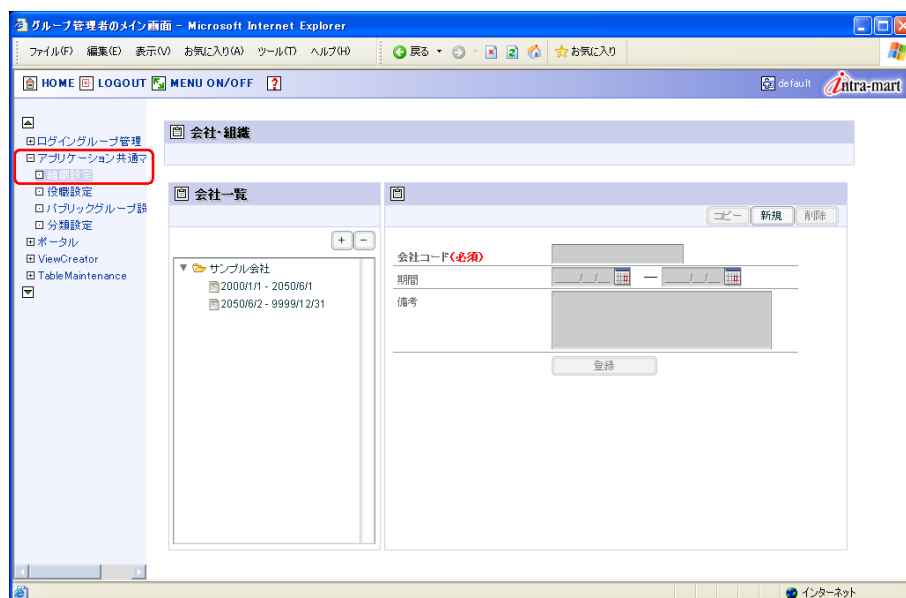
■ Adding a new company

Select [Application common master administration] - [Organization settings] and use the [List of companies] to register a company. This example registers a company established on January 15, 2007. The first "organization structure period" is registered when a company is created.



- The start date of the first organization structure period registered at the time of the company's creation cannot be modified. Therefore, the established date January 15, 2007 cannot be modified in this example.
- It is not possible to add a period which is before the first organization structure period registered at the time of the company's creation. Therefore, you cannot add a period before the established date January 15, 2007 in this example.

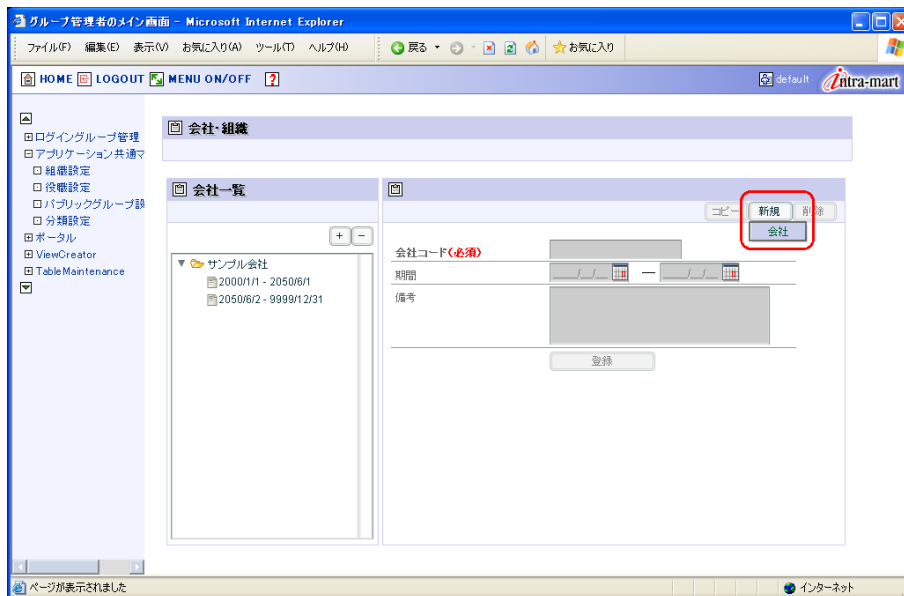
- 1 Select [Application common master administration] - [Organization settings] to register a company. The [Company and organization] screen is displayed.



<Screen to add a company>

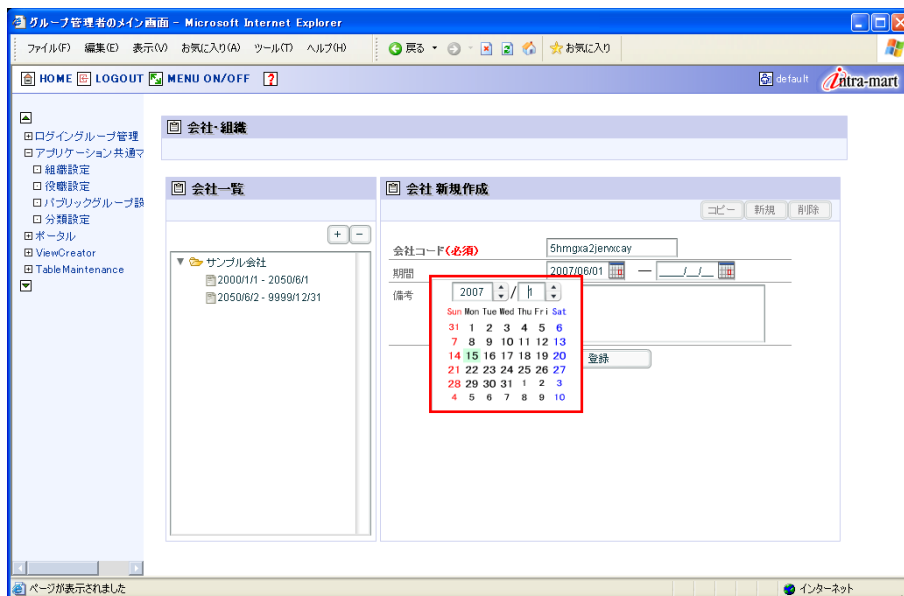
- 2 Click the [New] button in the [Company and organization] screen and select [Company] from the menu displayed.

When a registered company or period is selected on the tree on the left, the menu displays [Company] and [Period] as selections.



<[Company and organization] screen>

- 3 Enter the establishment date of the company by clicking the calendar icon and selecting the date (January 15, 2007 in this example). Leave the end date blank and click the [Register] button. When a company is registered, an organization structure period from the establishment date (1/15/2007) till a blank end date (12/31/9999) is created.

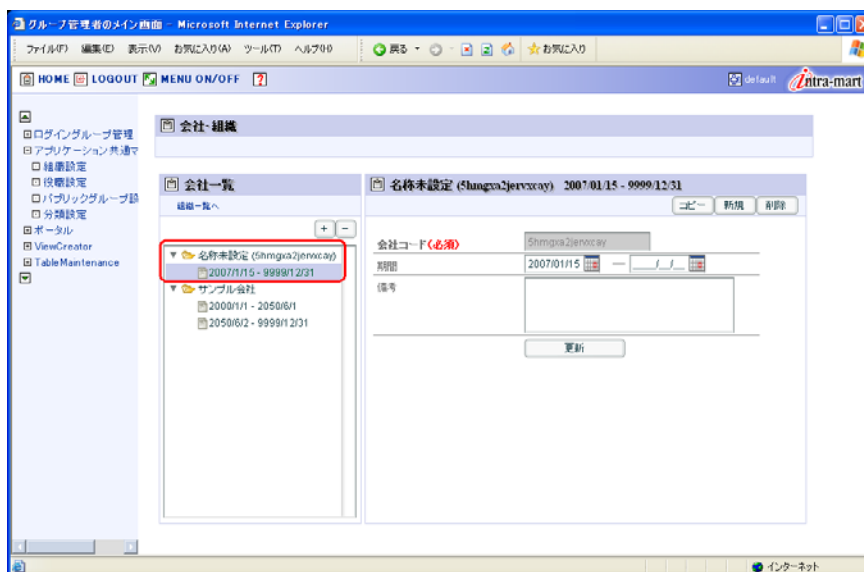


<Registering a company's period>



- Always set "12/31/9999" for the end date of the latest organization structure period unless the end date of the company is already determined. This prevents inconsistencies between the organization structure and organization elements in the event of a structural change. For specific setting examples, refer to [1.8.1.6 Changing an Organization Structure - 1: Creating a New Organization Structure] or [1.8.1.7 Changing an Organization Structure -2: Creating from a Copy of an Organization Structure Period].

- 4 The company and the first terminable information are displayed in the tree.
The company name is displayed as [Name not set] since it has not been entered at this point. Enter the company name in the company's attribute settings in the [List of organizations] screen.



<Company is registered>

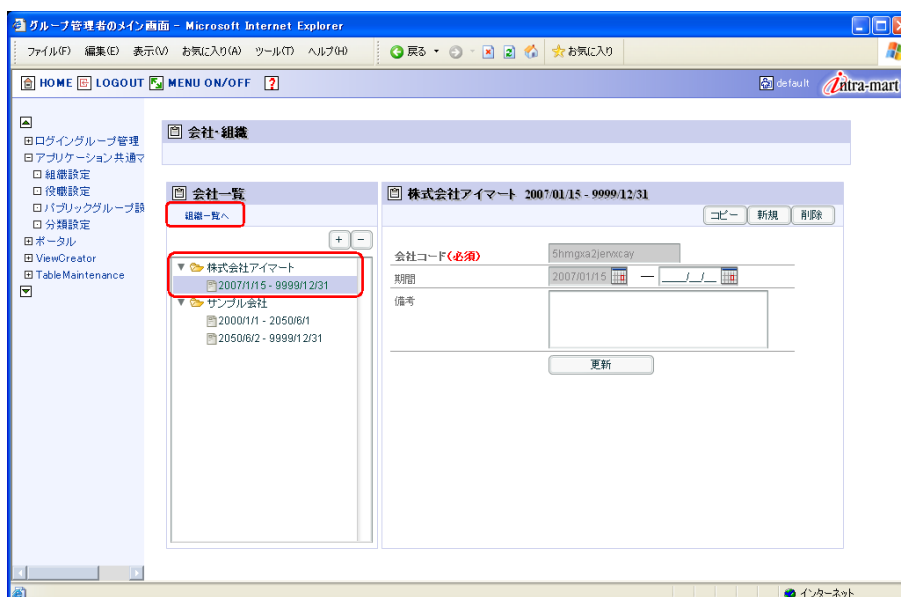
■ Registering company attributes

Even if a company is registered, the company name is displayed as [Name not set] without registering the company's attribute information. Register various attribute information of the company in the [List of organizations] screen since a company is also an organization element. For detailed operations, refer to [1.8.1.9 Registering Organization Element Attributes] (p.72).

■ Registering an organization element

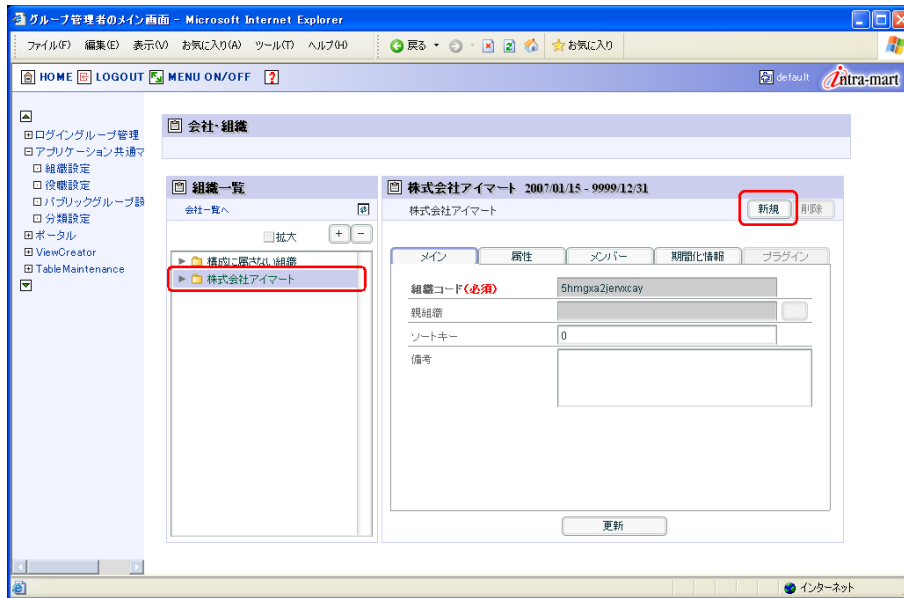
Once a company and its attributes are registered, add the organization elements to create a hierarchical organization structure. Organization elements are registered in the [List of organizations] screen.

- 1 Select a terminable information of the registered company and click [To list of organizations].
The [List of organizations] screen of the selected company is displayed.



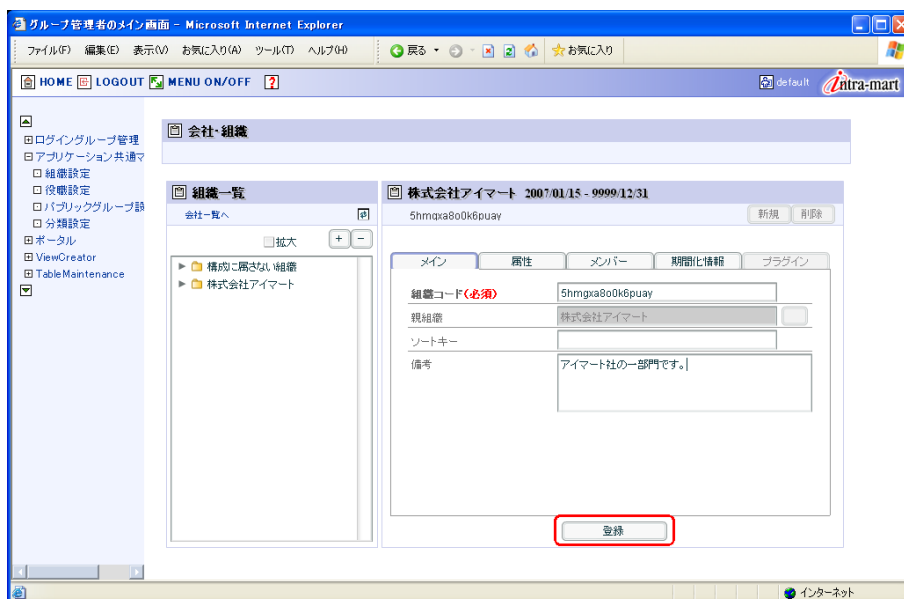
<Select a terminable information of a company and display the [List of organizations] screen>

- 2 Select the organization element under which you want to register a new organization element on the organization structure tree in the [List of organizations] screen and click the [New] button. The attribute settings screen for the new organization element is displayed.



<Registering an organization element and create the organization structure>

- 3 Enter the attributes such as the organization element name and click the [Register] button. The length of the period for the organization element you have just created is the same as the organization structure you have selected from the list of companies.



<Entering the attributes such as the organization element name>

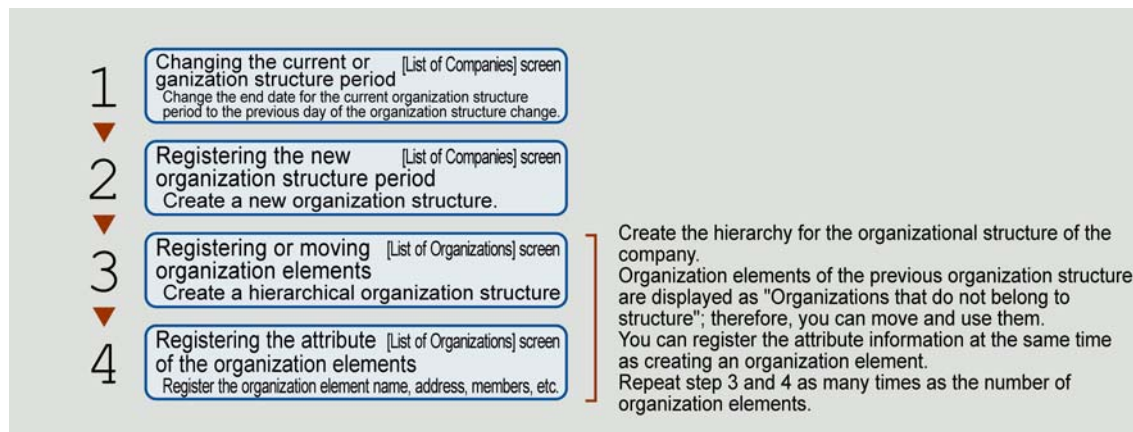
The created organization element is displayed on the tree on the left when you click the [Register] button.

■ Registering Organization Element Attributes

When registering an organization element, its attribute information can also be registered at the same time. For detailed operations, refer to [1.8.1.9 Registering Organization Element Attributes] (p.72).

1.8.1.6 Changing an Organization Structure - 1: Creating a New Organization Structure

When the company's organization structure changes, add an organization structure period. This chapter describes how to create a new organization structure. For partial changes of an organization structure, refer to [1.8.1.7 Changing an Organization Structure -2: Creating from a Copy of an Organization Structure Period] described later in this guide.



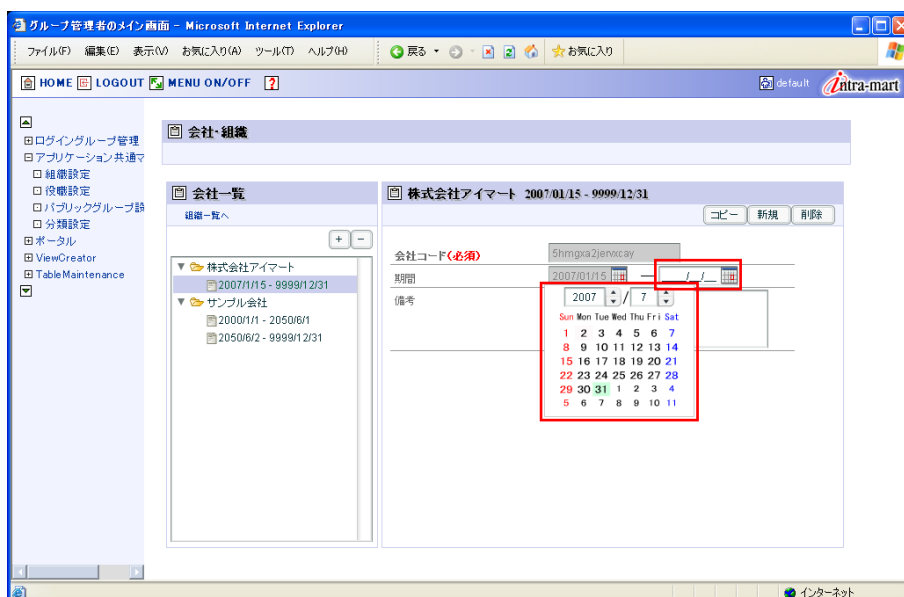
■ Changing the current organization structure period

As default, the end date of the current organization structure period is set to blank (12/31/9999). In order to add a new organization structure period, change the end date for the current period to the previous day of the organization structure change.

Changing the organization structure period: Where the organization structure change is on August 1, 2007

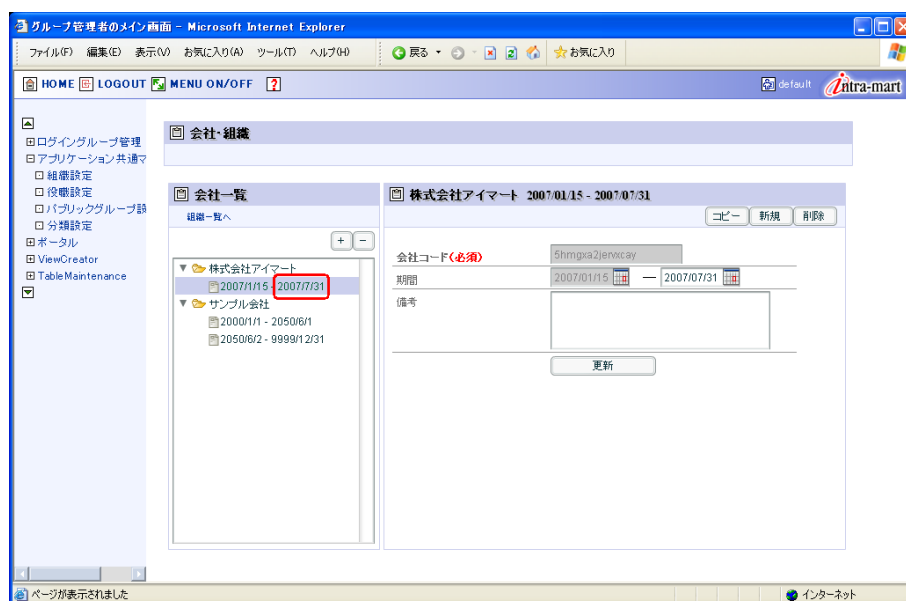
Before change : 1/15/2007 - Blank (12/31/9999)
After change : 1/15/2007 - 7/31/2007

- 1 Set the end date of the current organization structure period (7/31/2007) according to the date of the organization structure change (8/1/2007).
Change the end date to the previous day of the organization structure change.



<Changing the current organization structure period>

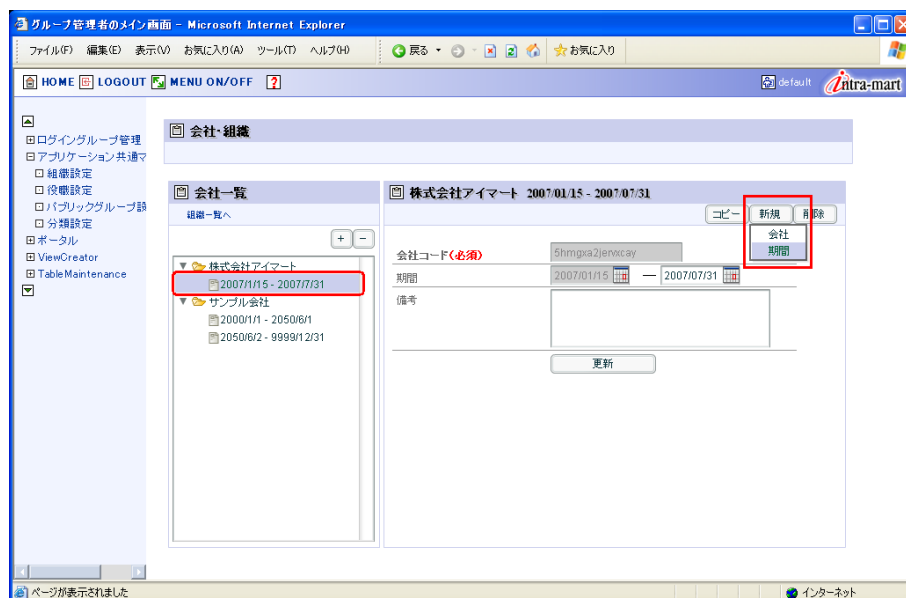
- 2 Click the [Update] button.
The terminable information in the list of companies is updated.



<The terminable information in the list of companies is updated>

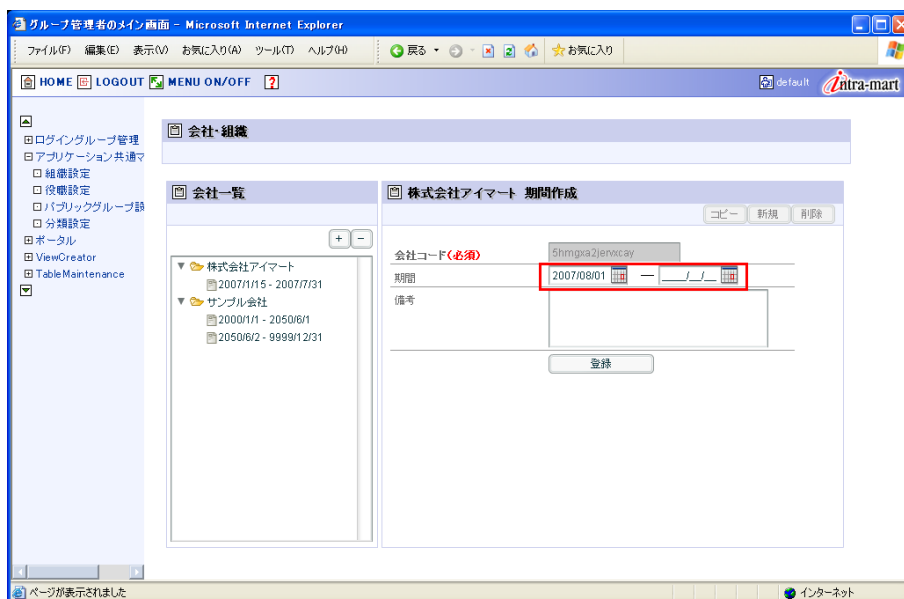
- Registering a new organization structure period
Next, create a new organization structure period (from August 1, 2007).

- 1 Check that the company for which you want to register an organization structure period is selected and click [Period] from the [New] button.



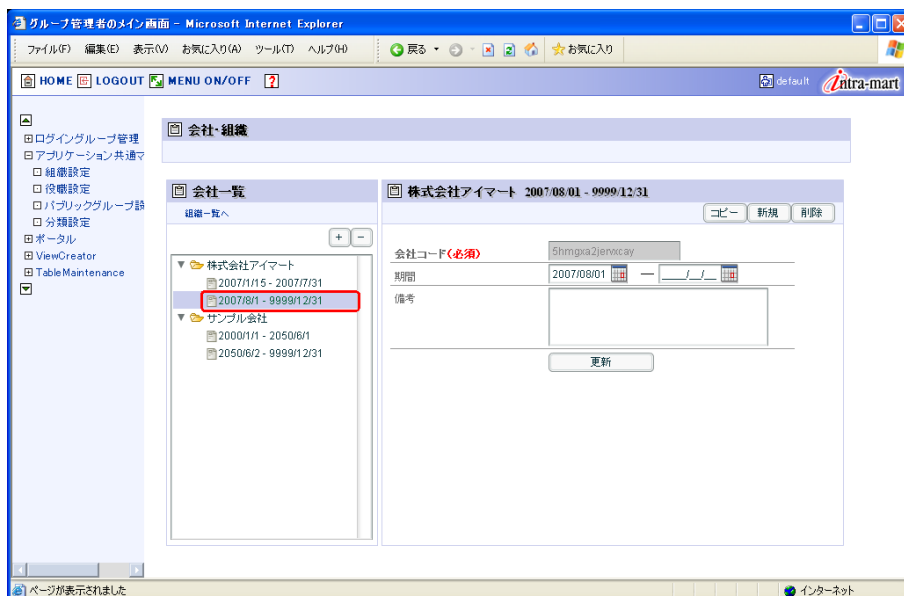
<Adding a new organization structure period>

- 2 The duration for the new organization structure period is displayed. The start date is displayed as the following day of the current organization structure period (8/1/2007) and the end date is blank. Check the duration and click the [Register] button.



<New organization structure period is displayed>

- 3 The newly created organization structure period (8/1/2007 - 12/31/9999) is displayed in the list of companies on the left.



<New organization structure period is displayed in the list of companies>

■ Registering and moving organization elements

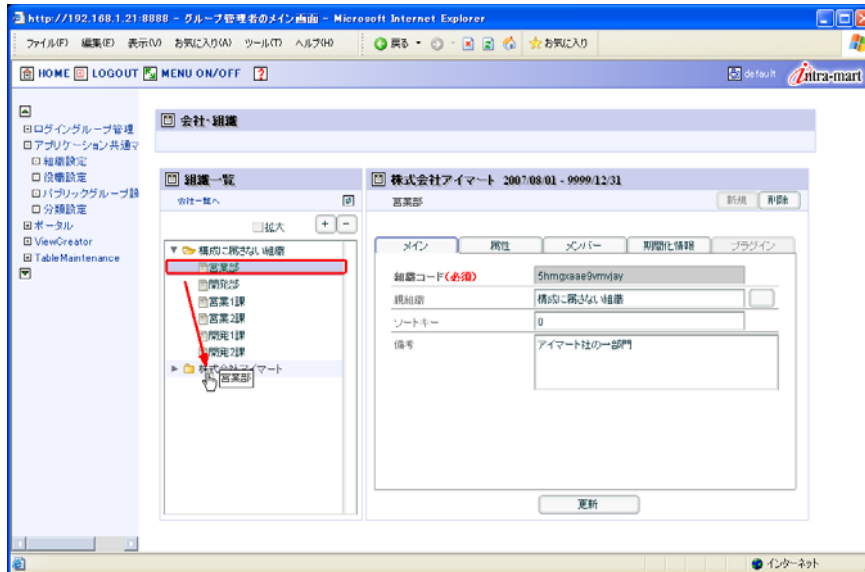
Create a new organization structure since no organization elements are registered in the new organization structure period.

Organization elements in the previous organization structure are displayed under the [Organizations that do not belong to structure]. These elements can be moved to create the new organization structure.

There are two ways to move these elements: the first method is to drag and drop on the tree in the list of organizations, and the second one is to specify the parent organization element in the element's attribute information. For detail information on how to register new organization elements, refer to [Registering an organization element] (p.61) of [1.8.1.5 Adding a New Company].

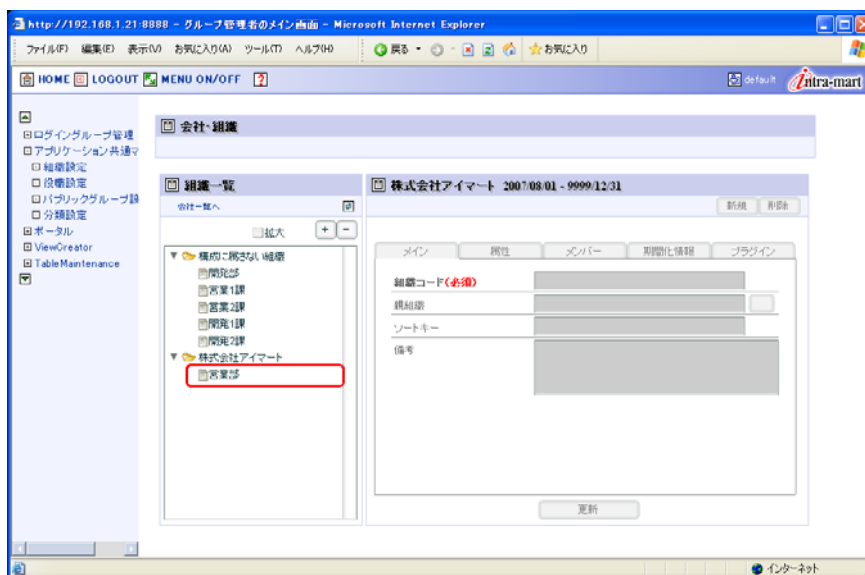
■ <<Moving an organization element by drag & drop>>

- 1 Drag the icon at the top of the element on the tree in the [List of organizations] screen.
Do not drag any parts other than organization element's icons.



<Moving an organization element by dragging>

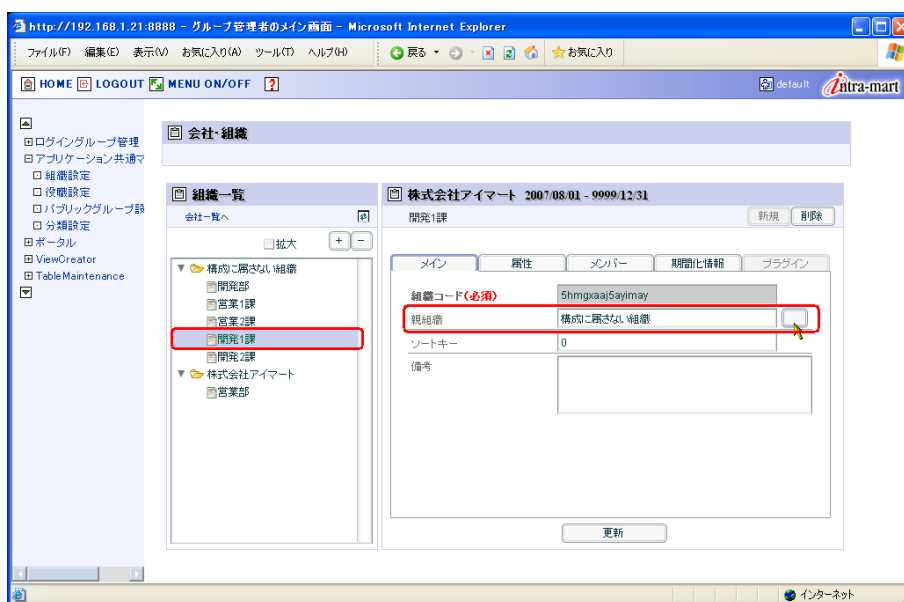
- 2 Drag the organization element and drop it on the destination parent element.
The dragged organization element is moved under the parent element.



<The organization element is moved>

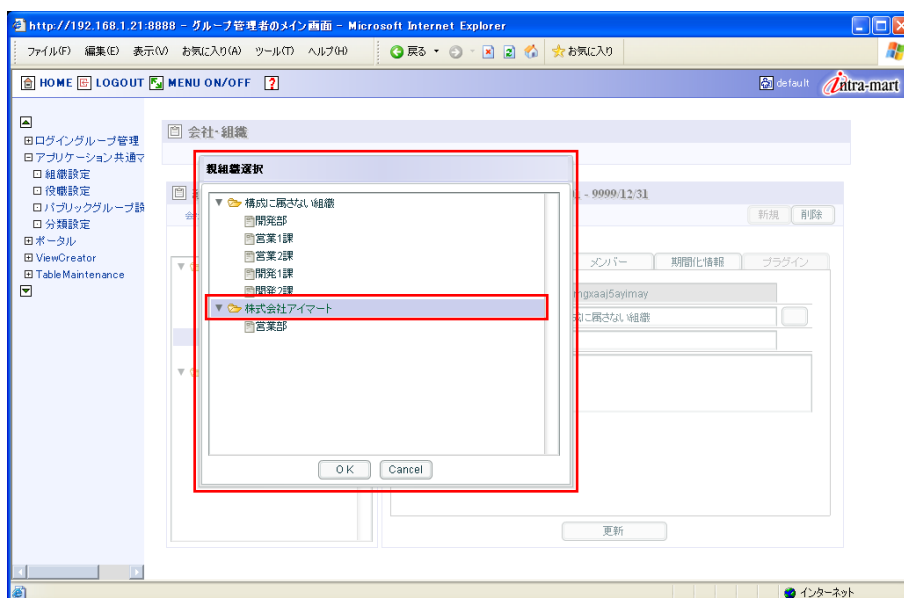
■ <<Moving an organization element by specifying the parent element>>

- 1 Display the attribute information [Main] tab of the organization element which you want to move, and click the icon in the [Parent organization] column.
A dialog box for selecting a parent organization element is displayed.



<Moving an organization element by selecting the parent organization element>

- 2 Select a parent organization in the displayed dialog box and click the [OK] button.
The dialog box closes and the organization element is moved under the selected parent element.



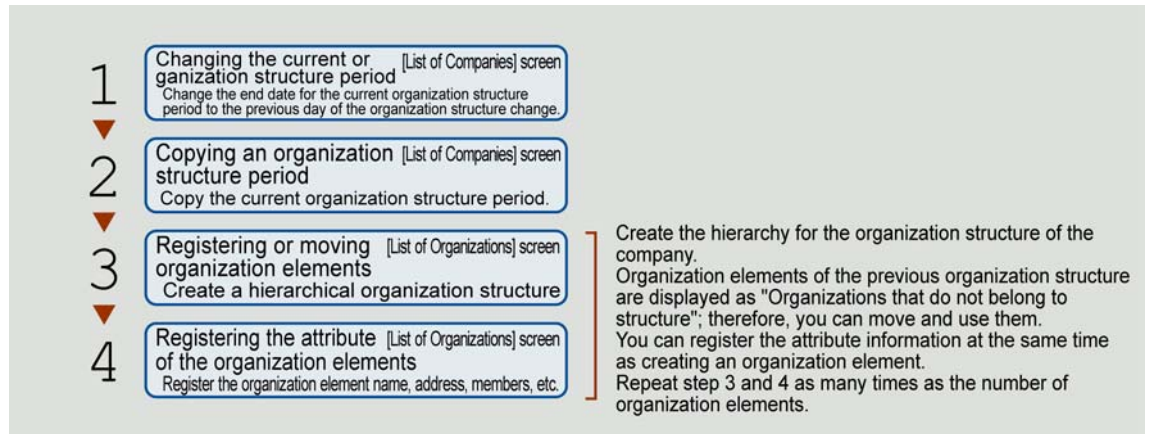
<Selecting the parent organization element>

■ Registering Organization Element Attributes

The attribute information can be registered at the same time as creating an organization element. For detailed operations, refer to [1.8.1.9 Registering Organization Element Attributes] (P.72).

1.8.1.7 Changing an Organization Structure -2: Creating from a Copy of an Organization Structure Period

If the new organization structure is similar to the current organization structure, the new one can be created from a copy of the current organization structure period.



■ Changing the current organization structure period

As default, the end date of the current organization structure period is set to blank (12/31/9999). In order to add a new organization structure period, change the end date for the current period to the previous day of the organization structure change.

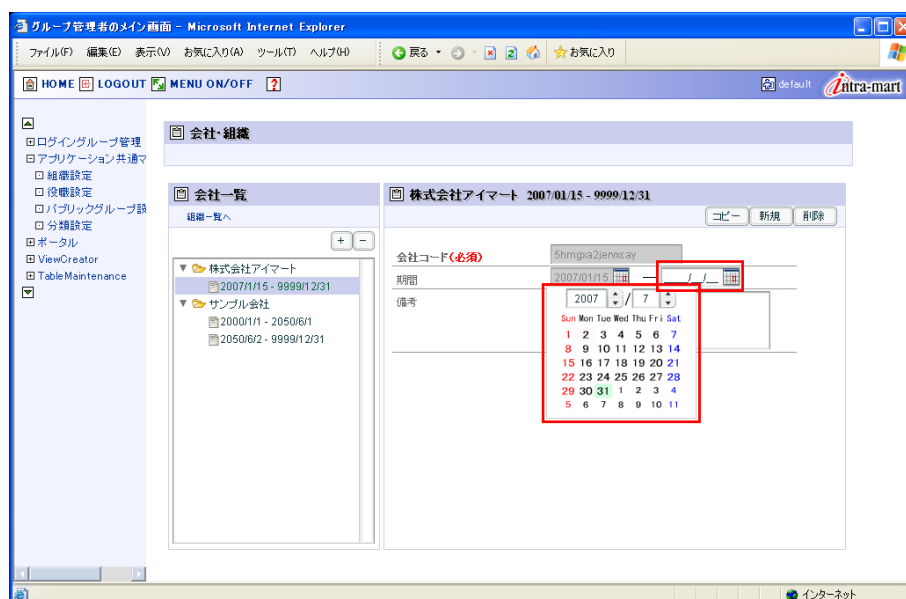
Changing the organization structure period: Where the organization structure change is on August 1, 2007

Before change: 1/15/2007 - Blank (12/31/9999)

After change: 1/15/2007 - 7/31/2007

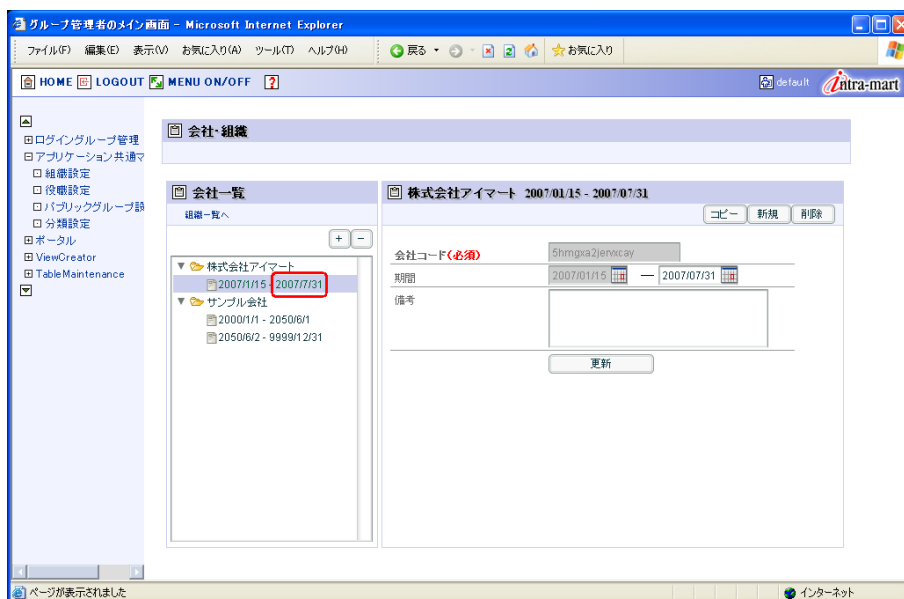
3 Set the end date of the current organization structure period (7/31/2007) according to the date of the organization structure change (8/1/2007).

Change the end date to the previous day of the organization structure change.



<Changing the current organization structure period>

- 4 Click the [Update] button.
The terminable information in the list of companies is updated.

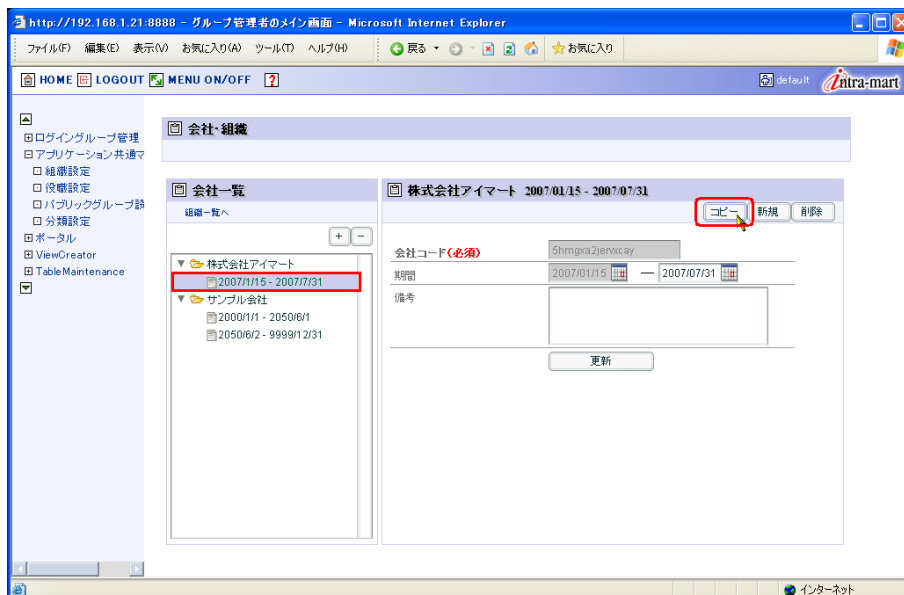


<The terminable information in the list of companies is updated>

■ Copying an organization structure period

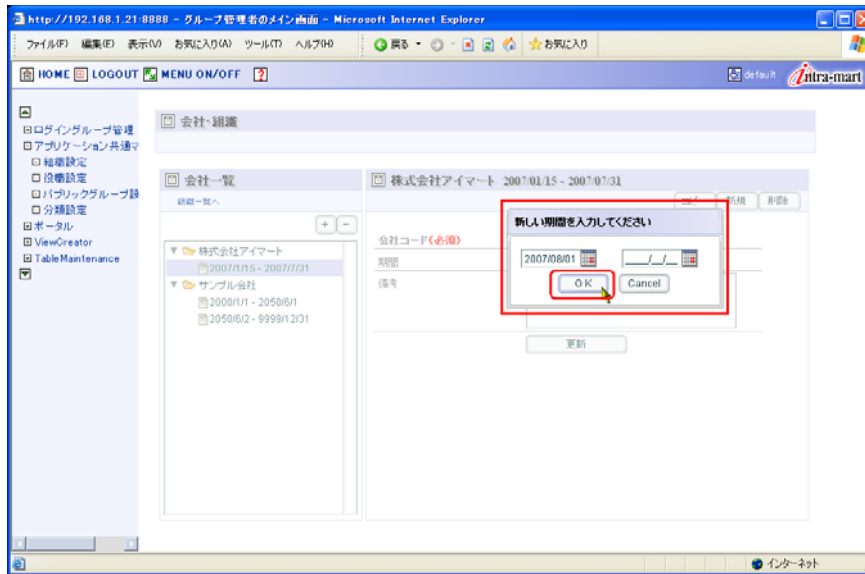
Next, copy the current organization structure period to create a new organization structure period.

- 1 Check that an organization structure period of the company for which you want to add an organization structure period is selected and click the [Copy] button.
A "period" setting window for a new organization structure period is displayed.



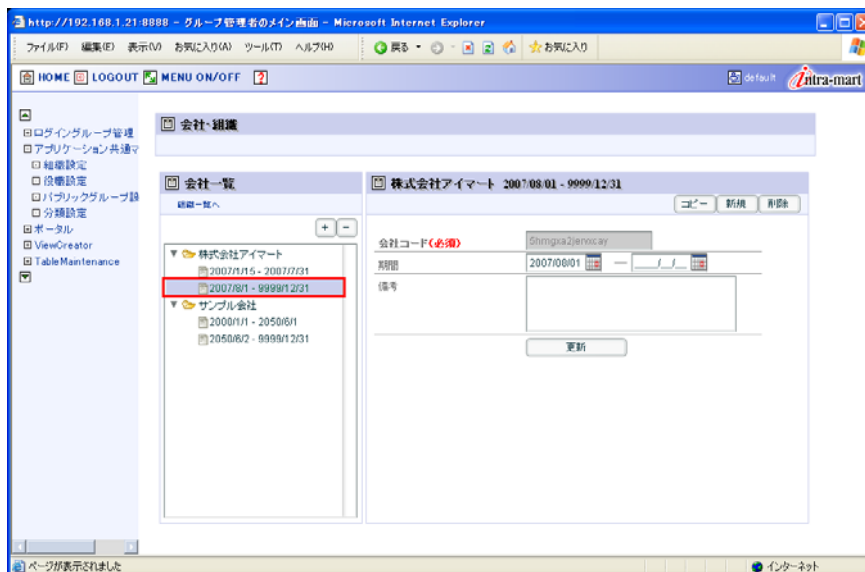
<Creating a new organization structure period by copying the current organization structure period>

- 2 A setting dialog box for a new organization structure period is displayed. Check that the start date is set to the following day of the previous organization structure period (8/1/2007) and click the [OK] button. Leave the end date blank.



<Setting the duration of a new organization structure period>

- 3 <New organization structure period is displayed in the list of companies on the left>
The organization elements are also copied together with the organization structure period.



<New organization structure period is displayed in the list of companies>

■ Registering and moving organization elements

A new organization structure period has been created from a copy. Update the organization elements to the latest status since they have been copied from the previous period.

For detail information on how to register and move organization elements, refer to [Registering and moving organization elements] of [1.8.1.6 Changing an Organization Structure - 1: Creating a New Organization Structure] (p.65).

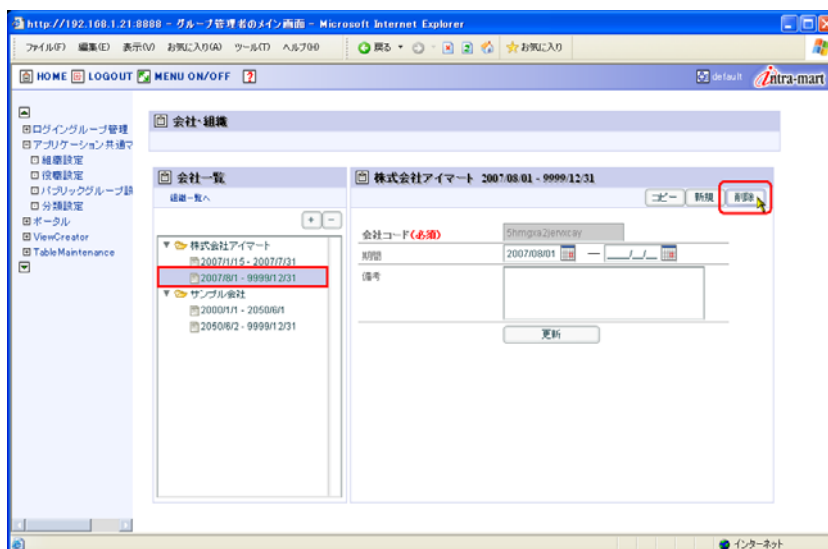
■ Registering Organization Element Attributes

The attribute information can be updated at the same time as registering an organization element. For detailed operations, refer to [1.8.1.9 Registering Organization Element Attributes] (p.72).

1.8.1.8 Deleting an Organization Structure

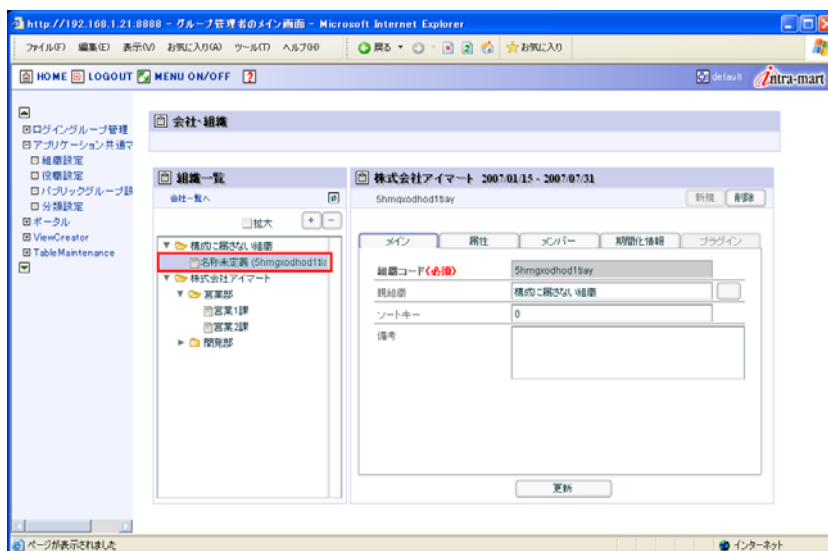
If you delete a registered organization structure period, the organization structure registered in that period is deleted. However, the organization elements which belonged to the organization structure are not deleted.

- 1 Select an organization structure period to delete and click the [Delete] button.



<Selecting an organization structure period to delete and clicking the [Delete] button>

- 2 The selected organization structure period is deleted.
If there are any organization elements which only exist within the deleted period, these organization elements are moved to a folder called "Organizations that do not belong to structure" without being deleted.



<Organization elements remain in the "Organizations that do not belong to structure" folder without being deleted>



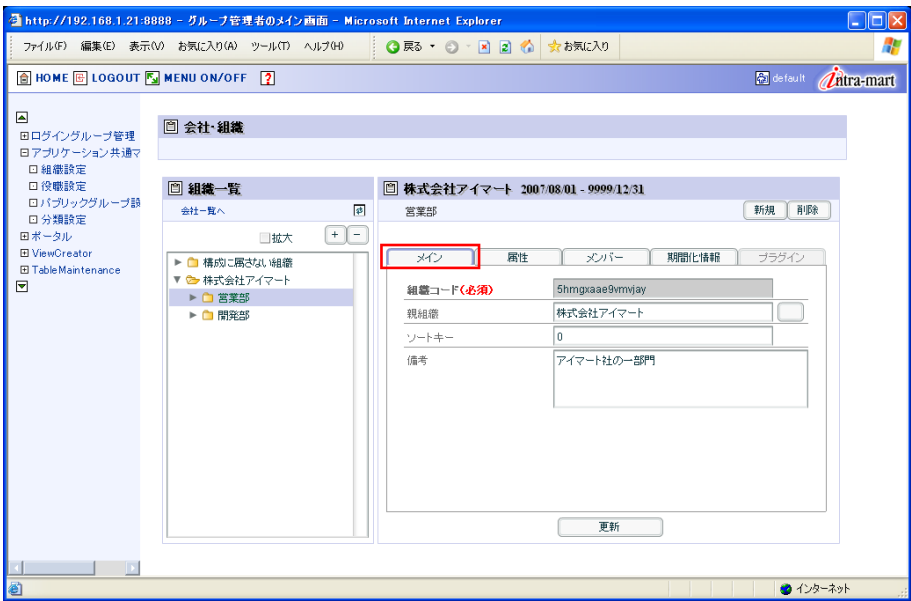
- Organization elements which do not belong to a structure is supplemented with the necessary period information automatically as they are moved into an organization structure. Therefore, they can be used in another organization structure period.



1.8.1.9 Registering Organization Element Attributes

This section describes how to set attribute information of organization elements (including companies) such as the name and address. The operation procedure for setting a company's attribution information is also described since a company is also an organization element.

- 1 Select the organization element you want to update from the tree in the [List of organizations] screen, and enter the details on the right side of the screen. Start from the [Main] tab. Move to the next tab when you have entered all necessary items.



<Entering the [Main] tab>

Organization code (required)
Parent organization

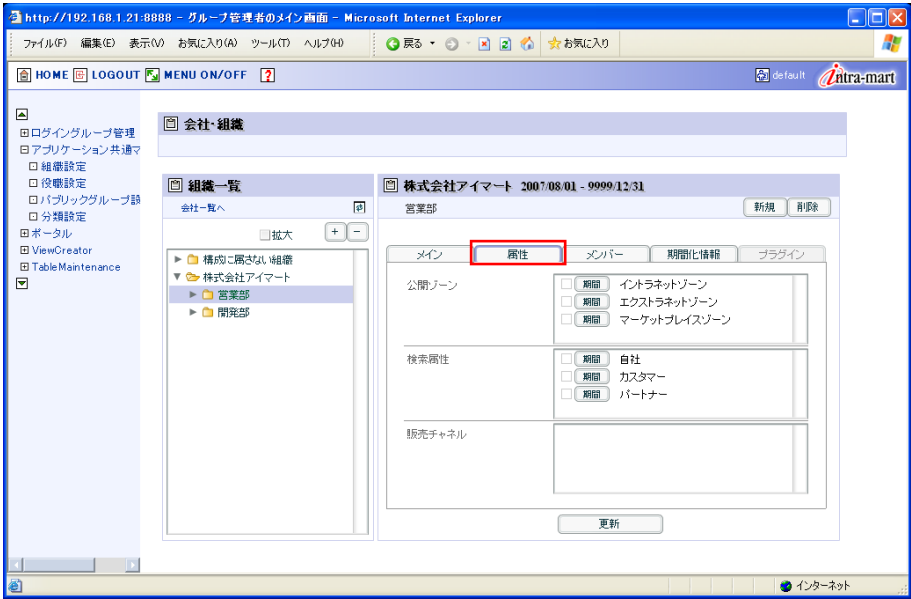
Sort key
Remarks
[Update] button

The company code is displayed. It is assigned at its creation.
This field is disabled when a company is selected. If it is an organization element, specify the parent organization.
Specify the order to be displayed in the list of companies with a number.
Enter remarks on the company.
Click [Update] when you have completed all entries on all tabs.



- It is not possible to create new organization elements under the [Organizations that do not belong to structure].
The duration of the new organization structure must include the organization structure period selected in [List of companies].
It is not possible to add or edit terminable information of organizations under the [Organizations that do not belong to structure] since they do not have terminable information.

- 2 Click the [Attribute] tab and enter information such as the public zone, search attributes, and sales channel. Move to the next tab when you have entered all necessary items.



<Entering the [Attribute] tab>

Public zone

Specify the public zone. Click the [Period] button of each item and specify the period in the displayed window.



Search attributes

Specify the search attributes as you did for the public zone.

Sales channel

Enter the sales channel.

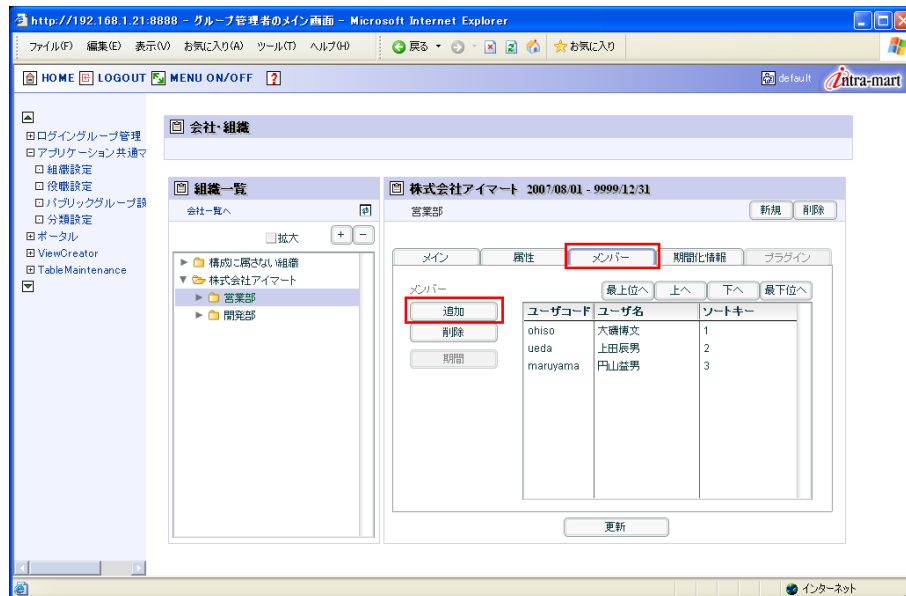
[Update] button

Click [Update] when you have completed all entries on all tabs.

* For detail information on the public zone and search attributes, refer to the later column [Advanced use of the application common master].

3 In the [Member] tab, register members of the company, and assign job titles and primary memberships to these members.

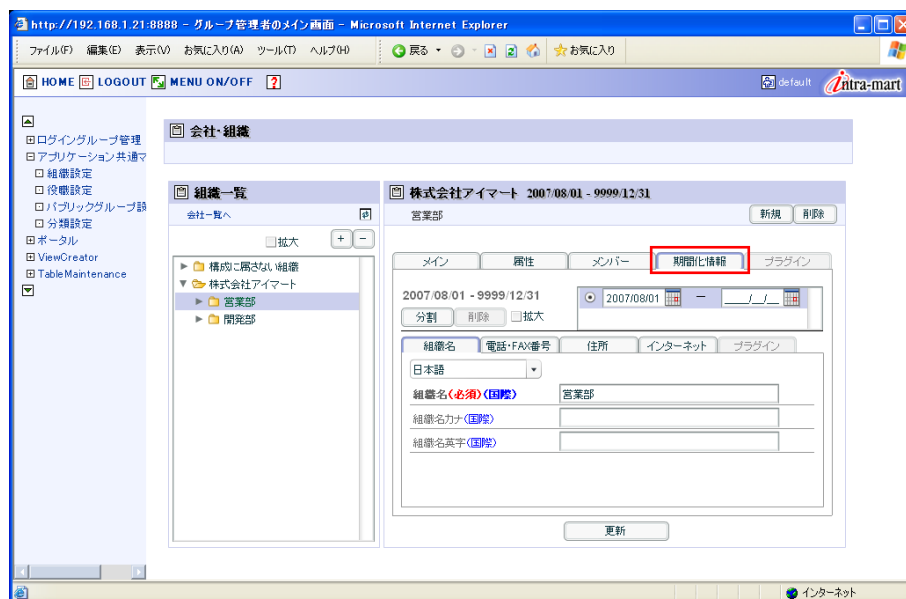
For detailed operations, refer to [1.8.1.10 Setting Members and Job Titles for an Organization Element] (p.79).



<Entering the [Member] tab>

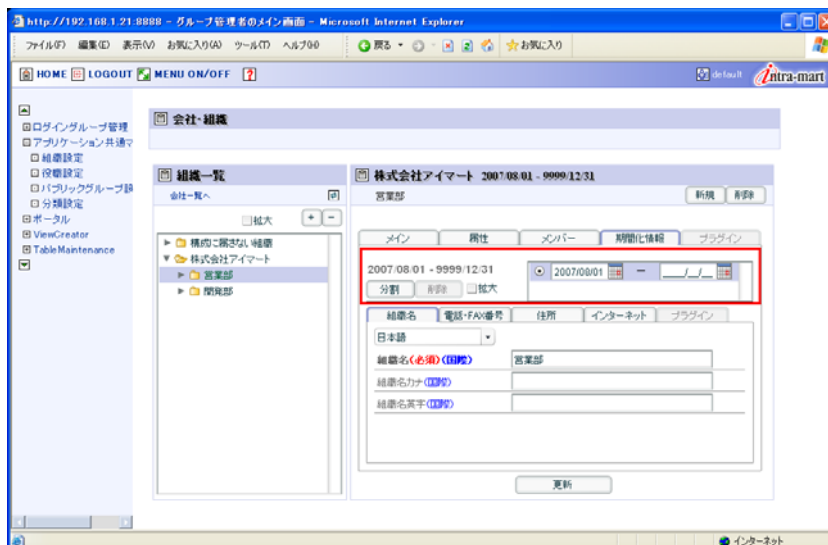
4 Enter attribute information for the selected organization element such as the address and telephone number. Attribute information is registered together with the period information since their history is maintained.

Specify the duration which agrees with the selected organization structure period (in this example, 8/1/2007 -). You may subdivide terminable information or join subdivided terminable information within the range of the organization structure period.



<Entering the [Terminable information] tab>

- 5 Enter information on each tab under the [Terminable information] tab. This screen allows you to subdivide or join terminable information within the range of the selected organization structure period.



<Updating the terminable information>

[Partition] button

Click to subdivide the selected period in two.

[Delete] button

Click to delete the selected period. The duration of the deleted period is filled by periods before and after the deleted period.

Enlarge

Check the box to enlarge the display of the list of periods.

(List of the periods)

When multiple periods are registered, the profile of the selected period is displayed underneath.



Column

Period Settings

Be sure to consider that overlapping periods cannot be registered when setting periods. For example, the following periods cannot be registered.

(Example 1) Period (1): 01/01/2000 - 12/31/2004 Period (2): 01/01/2002 - 12/31/2008

(Example 2) Period (1): 01/01/2000 - 12/31/2004 Period (2): 12/31/2004 - 12/31/2008

The following periods is registered properly.

Period (1): 01/01/2000 - 12/31/2004 Period (2): 01/01/2005 - 12/31/2006



- For detail information on the period of validity, refer to the column [Handling of the End Date of the Period of Validity] (p. 20).



Column

Updating part of organization element information

This section has described how to record the history of organization structure by adding an organization structure period. When the change is limited to only part of information such as the organization element name, it is possible to record the change history without adding a new organization structure period.

Record the history by adding terminable information for the organization element's attribute information while leaving the organization structure period continue as it is. Register a new terminable information on the [Terminable information] tab of the organization element attributes and change the required part of information such as the organization element name or telephone number.

1. Divide the organization element's terminable information into two by the [Partition] button.

株式会社アイマート 2007/08/01 - 9999/12/31

営業部 [新規] [削除]

メイン 属性 メンバー 期間化情報 プラグイン

2007/08/01 - 9999/12/31

[分割] [削除] ☐ 拡大

2007/08/01 -

2. Change the end date of the first period to the previous day of the change. The start date of the second period is automatically changed to the day of the change.

株式会社アイマート 2007/08/01 - 9999/12/31

営業部 [新規] [削除]

メイン 属性 メンバー 期間化情報 プラグイン

2007/10/11 - 9999/12/31

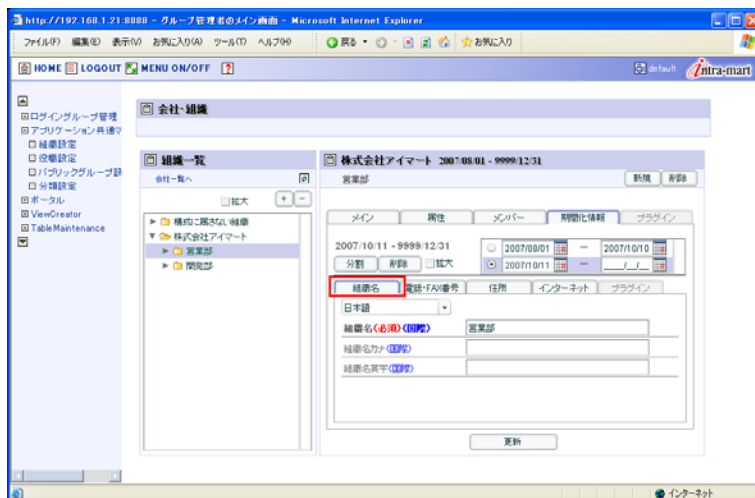
[分割] [削除] ☐ 拡大

2007/08/01 - 2007/10/10

2007/10/11 -

3. Select the new period and change attributes such as the name.

- 6 Enter information on the [Organization name] tab. Each information must be entered by periods and by languages.



<[Organization name] tab of [Terminable information]>

Organization name (required)

Enter the organization name. The organization code entered on the [Main] tab is displayed as the default. The organization name entered here will be displayed in the tree.

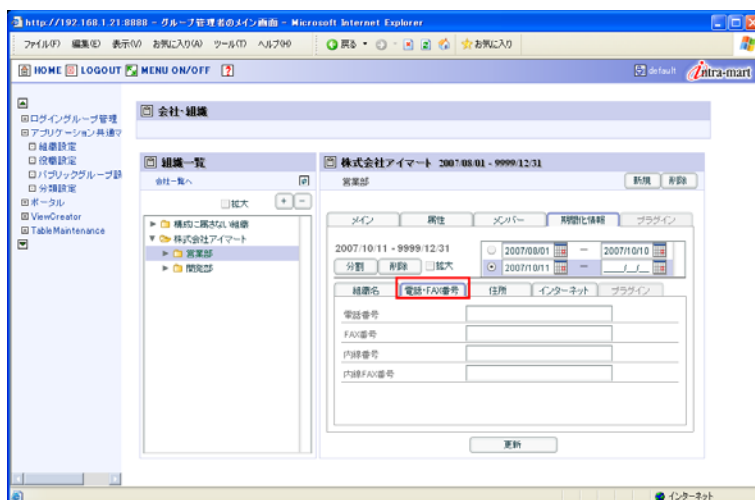
Organization name katakana

Enter the organization name in katakana (Japanese).

Organization name kanji

Enter the organization name in kanji (Japanese).

- 7 Click the [Phone / fax number] tab and enter information. Each information must be entered by periods.



<[Phone / fax number] tab of [Terminable information]>

Telephone number

Enter the telephone number.

FAX number

Enter the fax number.

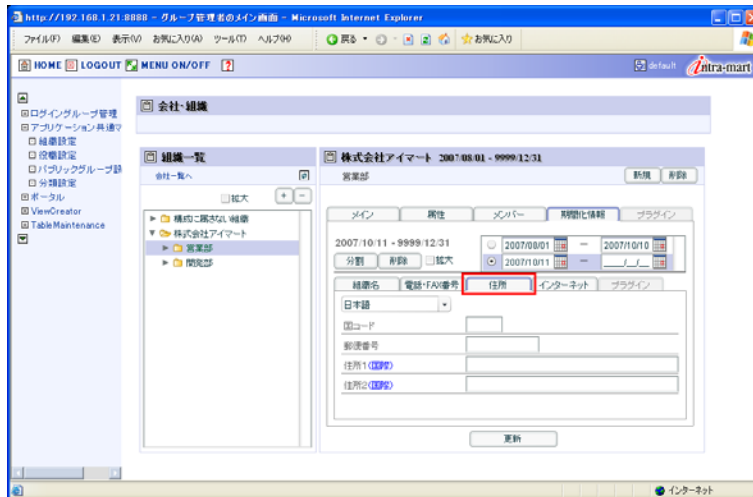
Extension number

Enter the extension number.

FAX extension number

Enter the fax extension number.

8 Click the [Address] tab and enter information. Each information must be entered by periods.



<[Address] tab of [Terminable information]>

Country code

Enter the country code.

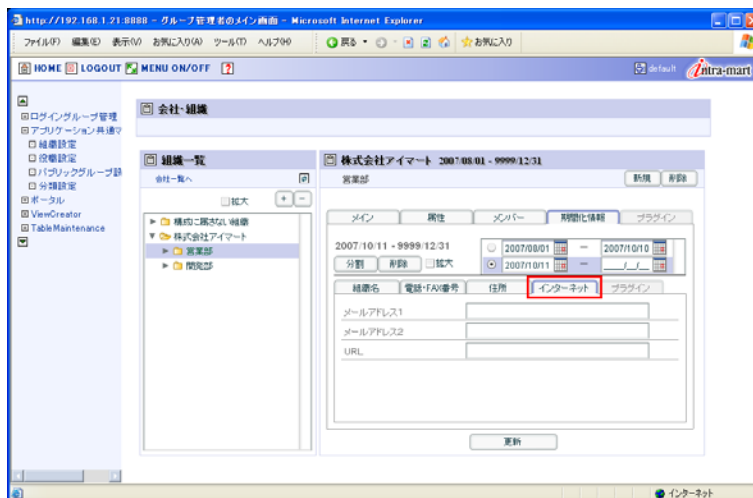
Postcode

Enter the postcode.

Address

Enter the address. Multiple languages are supported. Switch between the registered languages to enter the address.

9 Click the [Internet] tab and enter information. Each information must be entered by periods.



<[Internet] tab of [Terminable information]>

Email address 1, 2

Enter the email address. Up to two email addresses can be specified.

URL

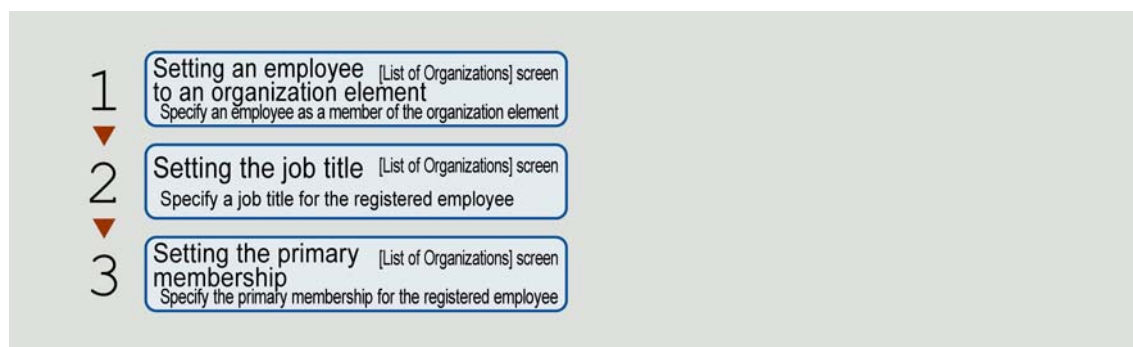
Enter the URL for the homepage.



- The [Plug-in] tab is reserved for future expansion. Currently not used.

1.8.1.10 Setting Members and Job Titles for an Organization Element

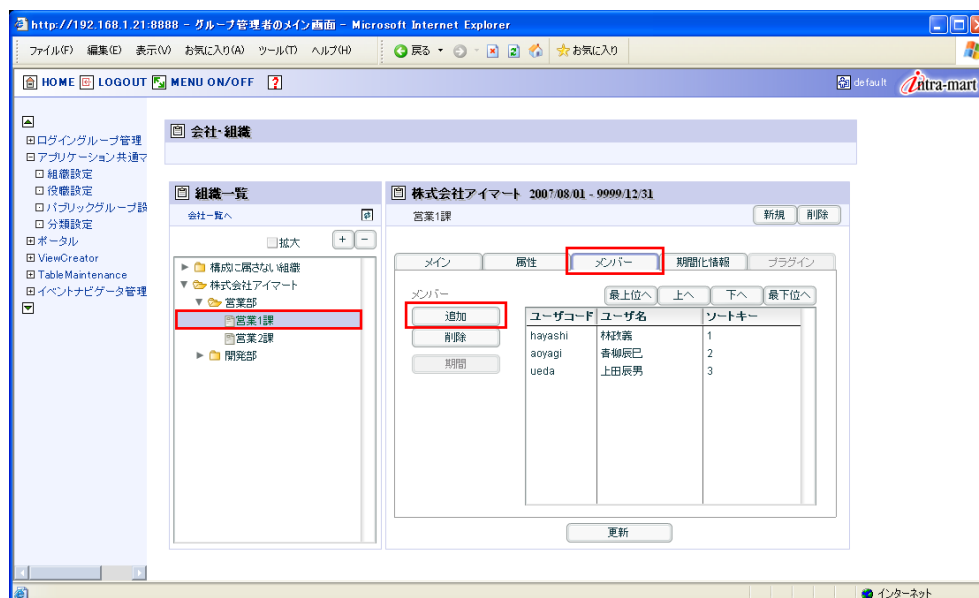
Members are part of the attribute information of the organization element. Make employees as members of a given organization element, and set the job title and primary membership on these member employees.



■ Registering an employee to an organization element

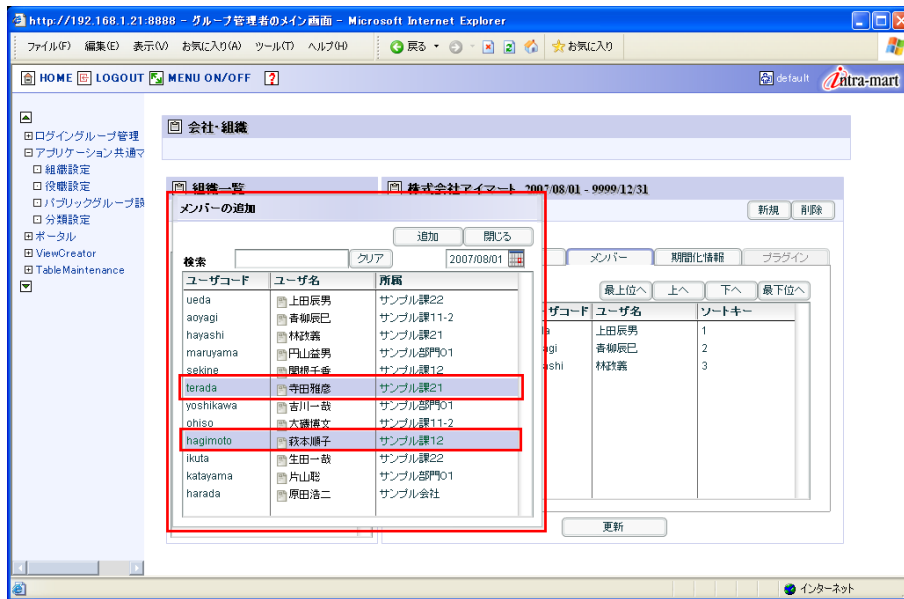
To register an employee as a member of an organization element, register the attribute information of the organization element. Also specify the employee's job title and primary membership at the same time as registering an employee.

- 1 Select an organization structure period of the company in the [Organization settings] screen and click [To list of organizations].
Display the [List of organizations] screen to specify an employee as a member.
- 2 Click the [Add] button on the [Member] tab of the organization element's attribute information.
The [Add member] dialog box is displayed.



<Adding a member>

- 3 Select an employee in the [Add member] dialog box and click the [Add] button.
 To select multiple employees at once, use the [Shift] or [Ctrl] key. When you have completed adding members, click the [Close] button.
- The duration that can be set in the [Add member] dialog box is restricted to the duration of the period of the selected organization structure.



<Selecting members>

- 4 Once you have returned to the attribute information screen, click the [Update] button.
 It is required to update once before setting the job title and primary membership for the registered employee.
 To delete the registered employee, press the [Delete] key.



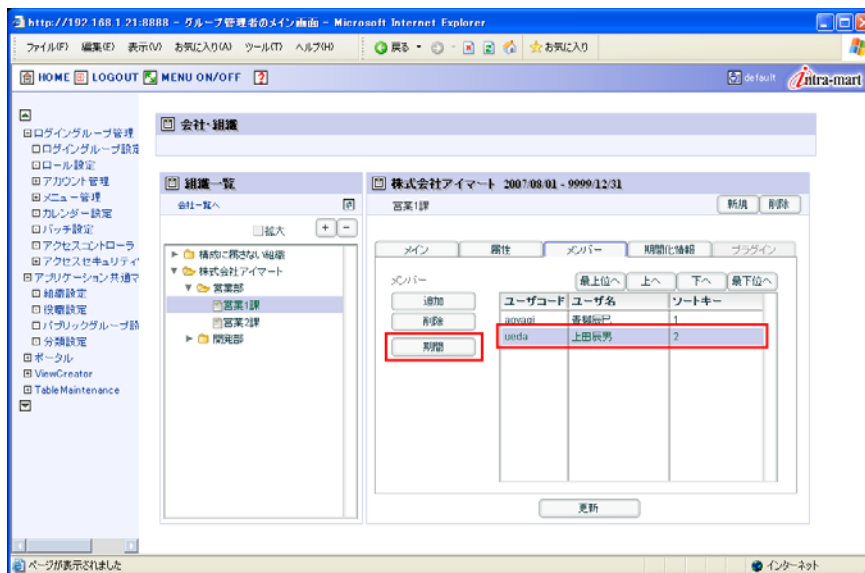
- When a new user is added to an organization, the user's membership period is set as the duration where the selected organization structure period and the employee's employment period overlap. Also, if there is any period where the user does not have any other primary membership, the duration is set as the primary membership period.

■ Setting a job title

A job title can be specified on an employee registered as a member. The job titles should have been registered beforehand in [Application common master administration] - [Job title settings].

- 1 After registering the employee as described above, select an employee to set the job title for and click the [Period] button.

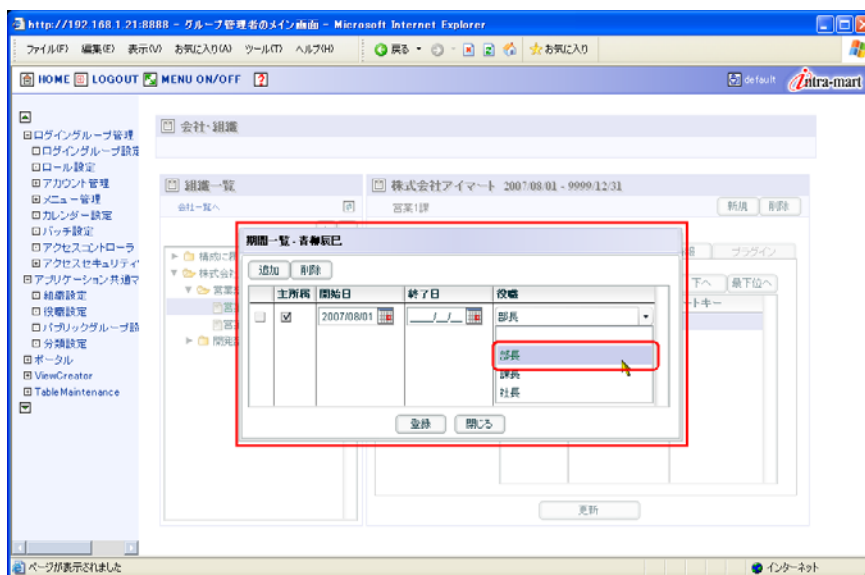
The [List of periods] dialog box is displayed.



<Click the [Period] button>

- 2 Select a job title in the [List of periods] dialog box and click the [Register] button.

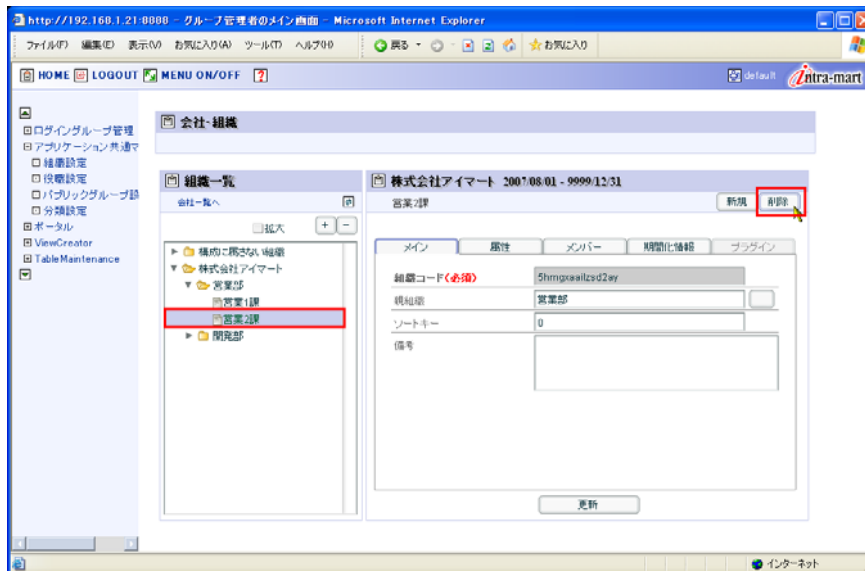
Job titles should have been registered in advance using [Job title settings]. Specify the period within the duration of the destination organization element. To specify another period with another job title, click the [Add] button.



<Setting a job title>

1.8.1.11 Deleting an Organization Element

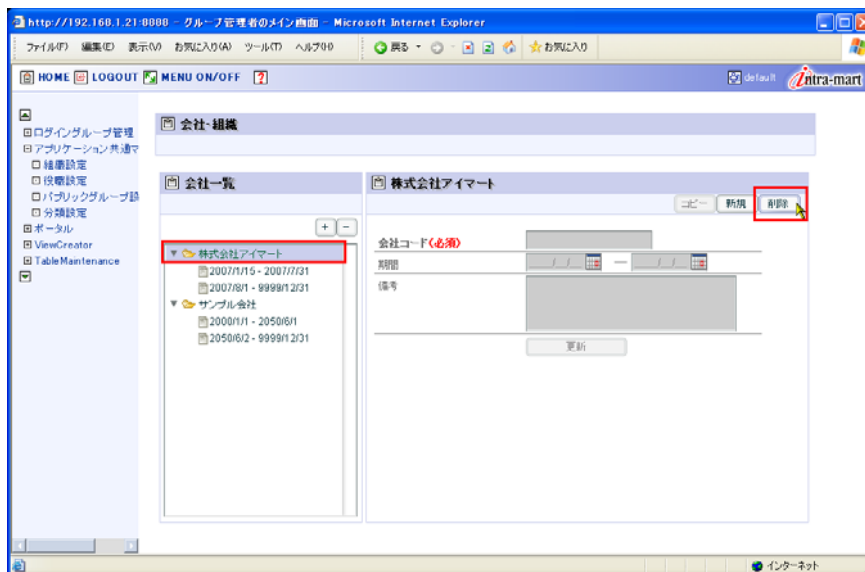
Use [List of organizations] to delete an organization. If you delete an organization, everything in that organization is erased and cannot be reused. However, if you delete an organization element with a child organization element, the child organization element is moved under the [Organizations that do not belong to structure] folder and reusable while the given organization element has been deleted.



<Deleting an organization element>

1.8.1.12 Deleting a Company

Use [List of companies] to delete a company. All information belonging to the company is deleted such as organization elements and organization structures.



<Deleting a company>



1.8.1.13 List of Messages for Organization Settings

A message is displayed if there is an inconsistency of period settings in registering an organization. You will not be able to register or update until you solve the inconsistency. The following lists messages, their cause and remedy.

Screen	Event	Period error details	Message	Remedy
[List of companies] - Creating a new company	[Register] button	Start date and end date are set the wrong way round	The time order of the activation start date (mm/dd/yyyy) and activation end date (mm/dd/yyyy) of the organization structure period is not correct.	Correct the order of the dates.
[List of companies] - [New] - [Period]	[Register] button	Periods are overlapping.	The configured periods (mm/dd/yyyy - mm/dd/yyyy) and (mm/dd/yyyy - mm/dd/yyyy) overlap. Reconfigure the settings to avoid overlap.	Correct the periods to avoid overlap.
		Start date and end date are set the wrong way round	The time order of the activation start date (mm/dd/yyyy) and activation end date (mm/dd/yyyy) of the organization structure period is not correct.	Correct the order of the dates.
		The added period is out of the range of the organization structure period.	The organization period is incorrect. Set the periods of organizations participating in a structure to match the period (mm/dd/yyyy - mm/dd/yyyy) of the organization structure.	Specify the period within the range set in the organization.
[List of companies] - [Update]	[Update] button	Start date and end date are set the wrong way round	The time order of the activation start date (mm/dd/yyyy) and activation end date (mm/dd/yyyy) of the organization structure period is not correct.	Correct the order of the dates.
		The company period is out of the range of the organization structure period.	The organization period is incorrect. Set the periods of organizations participating in a structure to match the period (mm/dd/yyyy - mm/dd/yyyy) of the organization structure.	Specify the period within the range set in the organization.
[List of companies] - [Copy company] - [New period input] popup	[OK] button	Start date and end date are set the wrong way round	The time order of the activation start date (mm/dd/yyyy) and activation end date (mm/dd/yyyy) of the organization structure period is not correct.	Correct the order of the dates.
		The specified period created from a copy is out of the range of the organization structure period.	The organization period is incorrect. Set the periods of organizations participating in a structure to match the period (mm/dd/yyyy - mm/dd/yyyy) of the organization structure.	Specify the period within the range set in the organization.
[List of organizations] - [Member] tab - [List of periods] popup screen (user membership period settings)	[Register] button	The user's membership period is out of the range of the profile period.	The specified membership period (mm/dd/yyyy - mm/dd/yyyy) is incorrect. Set within the period (mm/dd/yyyy - mm/dd/yyyy) specified for the user.	Specify the user's membership period within the range set for the profile.
		Start date and end date are set the wrong way round	The period (mm/dd/yyyy - mm/dd/yyyy) is invalid. Set the end date to a date after the start date	Correct the order of the dates.
		Periods are overlapping.	Period (mm/dd/yyyy - mm/dd/yyyy) and period (mm/dd/yyyy - mm/dd/yyyy) overlap.	Correct the periods to avoid overlap.



1.8.2 Job Title Setting

Job titles can be specified for each company using [Application common master administration] - [Job title settings]. Job title information is registered together with the period information since their history is maintained.

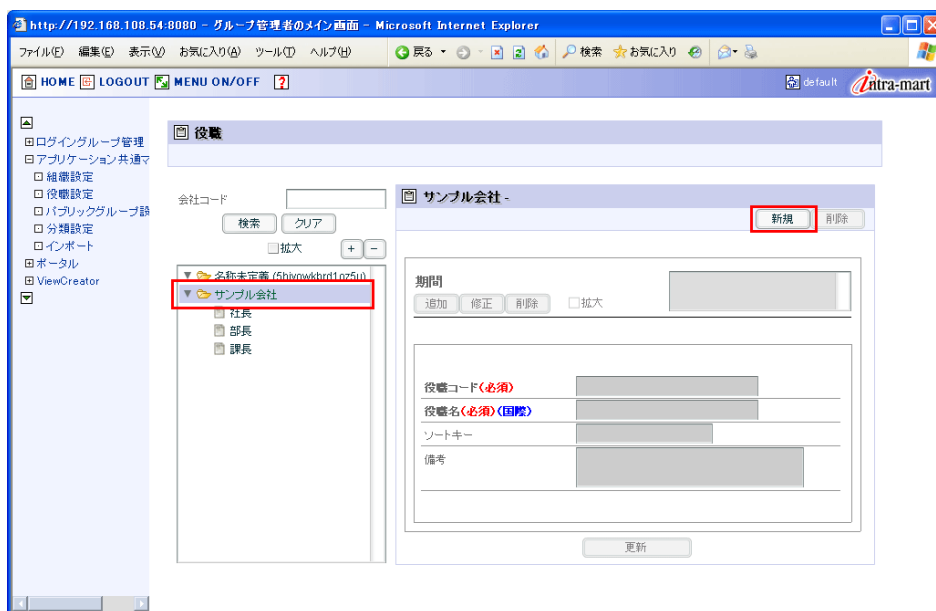
This screen is only used to register job titles. To associate these job titles and users, use [Organization settings] and select job titles you have registered here when registering members for an organization.

<Job title registration screen>

- 1 Select [Application common master administration] - [Job title settings] to register a job title.
The [Job title settings] screen is displayed.
- 2 Enter a code in [Company code] and click the [Search] button. If you search without entering anything in [Company code], all companies are displayed.
Registered companies and registered job titles are displayed on the tree on the left.

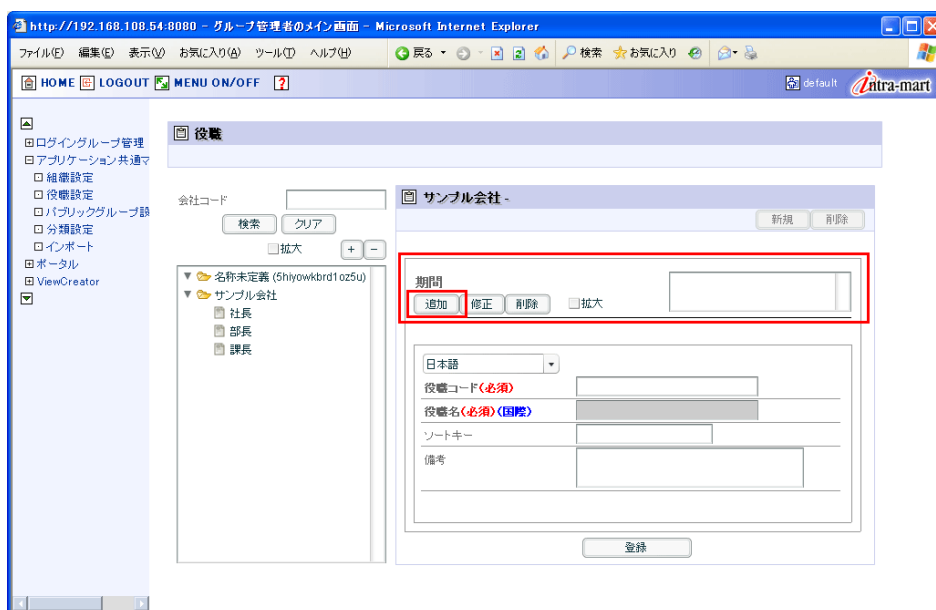
<Registered companies and job titles are displayed>

- 3 Select a company in the tree and click the [New] button.
The screen for registering a new job title is displayed.



<Registering a new job title>

- 4 Click the [Add] button in the period column to register the period for the job title.

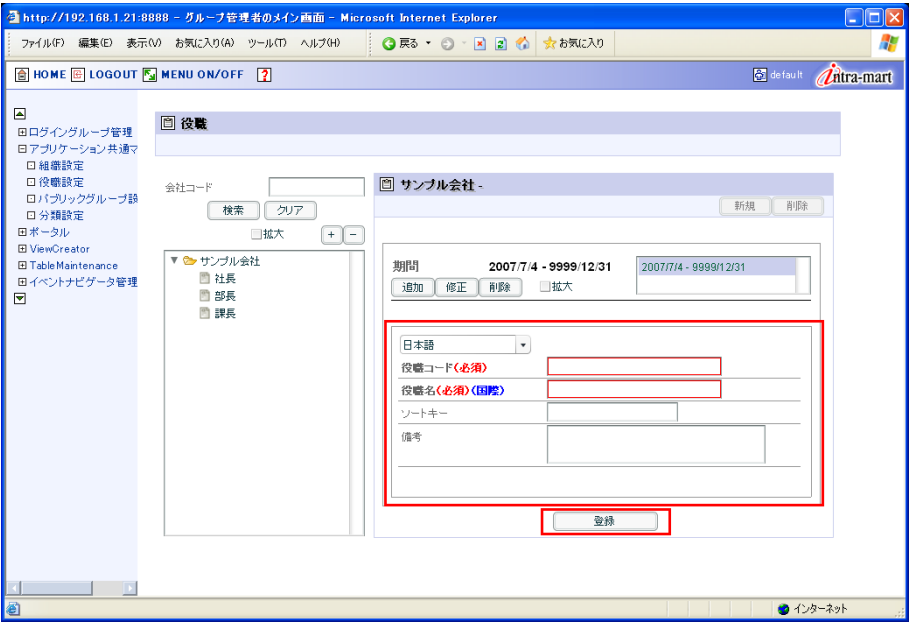


<Adding a period>

[Add] button
[Modify] button
[Delete] button

Click to newly add a period.
Click to change the selected period information.
Click to delete the selected period information.

- 5 Enter the job title name and other information, click the [Register] button.
The job title is registered.



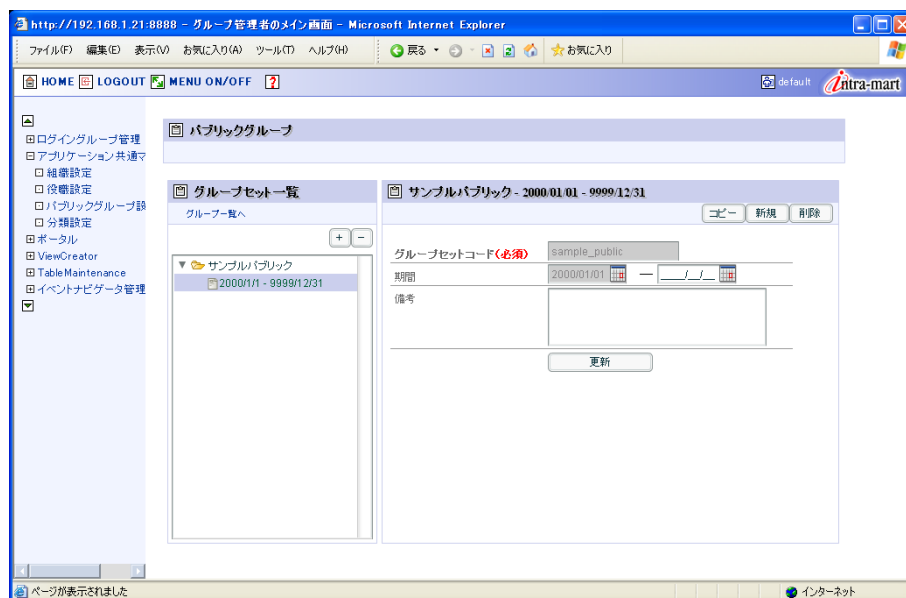
<Registering job title information>

Job title code (required)	Enter the job title code.
Job title name (required)	Enter the job title name. Multiple languages are supported for this item. Enter the name for each language.
Sort key	Specify a number to indicate the display order of this item within the list of job titles.
Remarks	Enter remarks.
[Register] button	Click to register the entered job title.



1.8.3 Public Group Settings

Public groups can be used to form a user group which is not bound to organization elements. They are used to represent groups recognized in the company such as a project team. To create public groups, use [Application common master administration] - [Public group settings]. Public groups can have a hierarchical structure and their history is maintained the same as organization elements. Operations for public group settings are the same as setting organization elements.



<Public group registration screen>



1.8.4 Application Common Master Import / Export

Use [Login group administration] - [Batch settings] to import companies and organizations, job titles, public groups, and user profiles registered in the application common master.



<Application common master import screen>



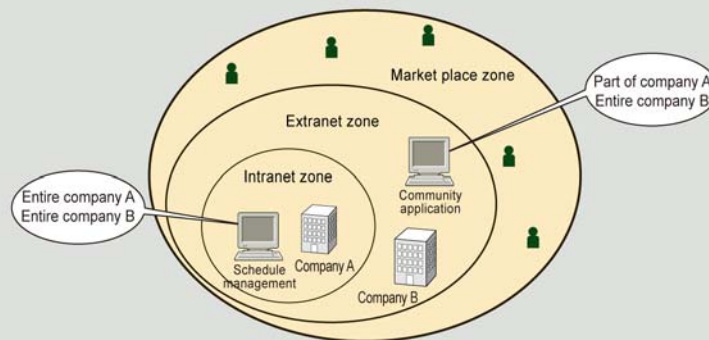
Column

Advanced use of the application common master (public zones and search attributes)

The intra-mart manages users by grouping them into companies and organizations, public groups, and private groups. In addition, it is possible to use advanced grouping with two keys; "public zones" and "search attributes".

•Public zone

Use public zones when you control the disclosure scope of companies and organizations according to the nature of application software to create. For example, the entire organization and all employees are shown in the internal schedule management. On the other hand, you would like to display only part of the company in a community application whose user includes counterparties. Public zones can be deployed in such a case.

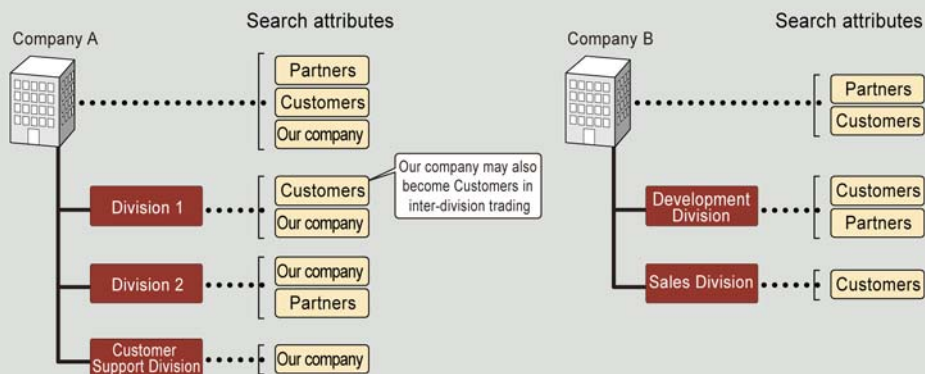


Use [Application common master administration] - [Type settings] to create public zones.

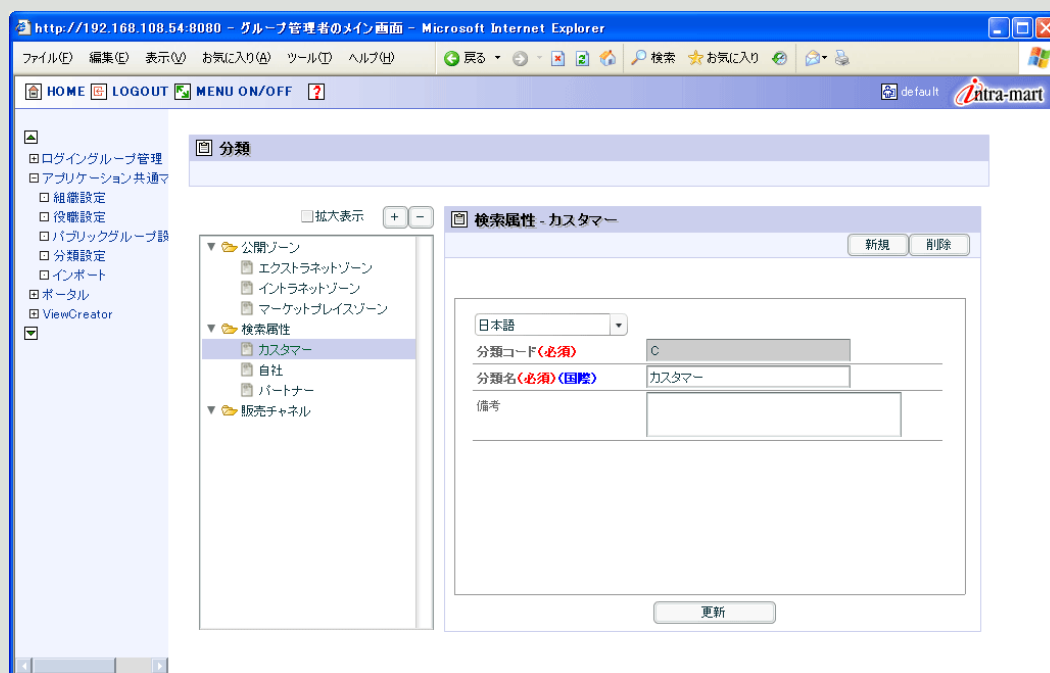
<[Type settings] screen>

•Search attributes

Search attributes are the key attached to organizations and used to define the role of the organization. For example, search attributes are used when you "display certain companies or organizations in a customer search ("Customers" in the following diagram)" or "display certain organizations in the list of partners ("Partners" in the following diagram)".



Use [Application common master administration] - [Type settings] to create search attributes.



<[Search attribute settings] screen>

For detail information on how to implement application software using public zones and search attributes, refer to [Application Common Master Reference].

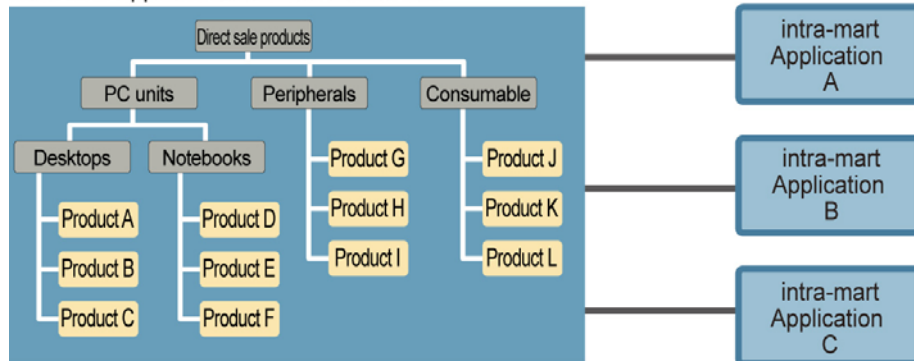
1.9

Product Master (Application Common Master)

The intra-mart provides a product master which can be shared among application software series. The menus for the product master are located in the [Product master settings] folder.

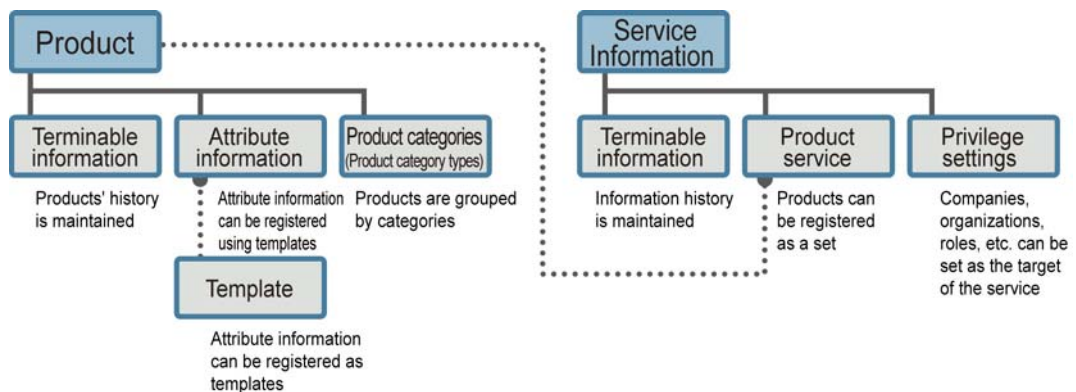
[Product Master]

intra-mart application common master unit



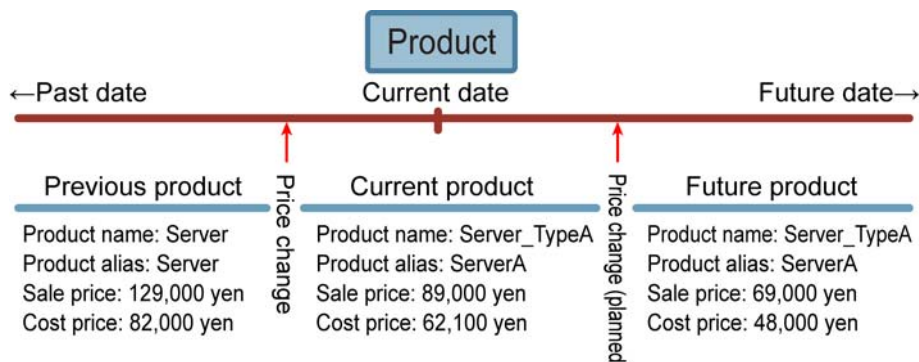
1.9.1 Features of the Product Master

The product master settings provide the following functions.



1.9.1.1 Product history management

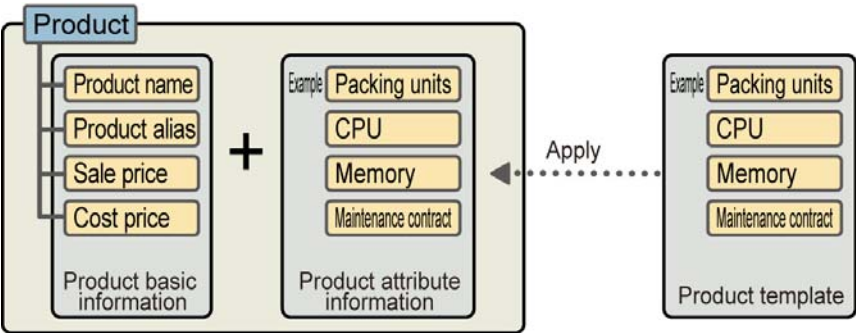
Product history information such as the product name, product name alias, sales unit price, and cost unit price is maintained. Therefore, data can be processed with information with the applicable date. Products and product master associated information also support internationalization.





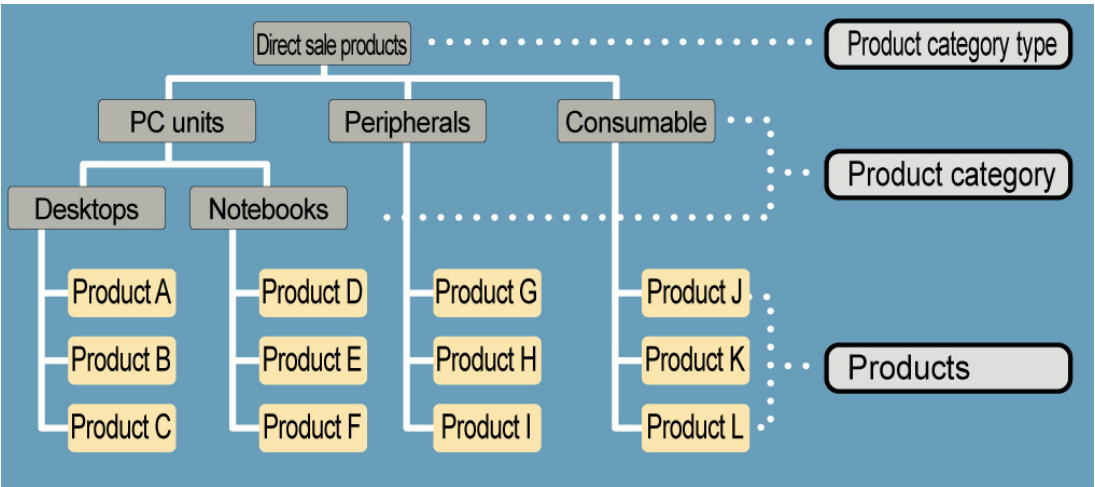
1.9.1.2 Product Attribute Information and Templates

In addition to the product name, product name alias, sales unit price, and cost unit price, attribute information can be added as needed to the product. To add attribute information, register attribute information in the product template in advance and select which template to be applied to the product in the product master.



1.9.1.3 Categorizing and Managing Products

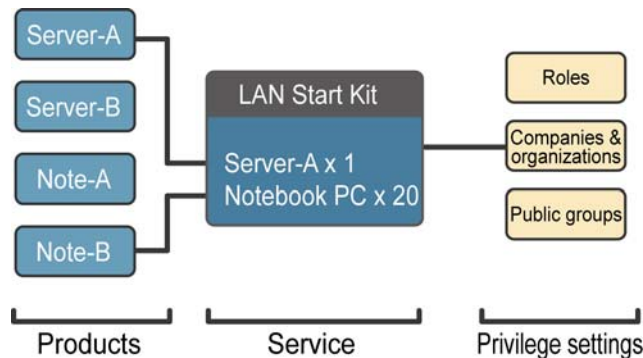
Products registered to the product master can be grouped under categories as necessary. To group them, register product categories in a tree structure and register products in the lowest level categories (the highest level product category is called the "product category type").





1.9.1.4 Service Information

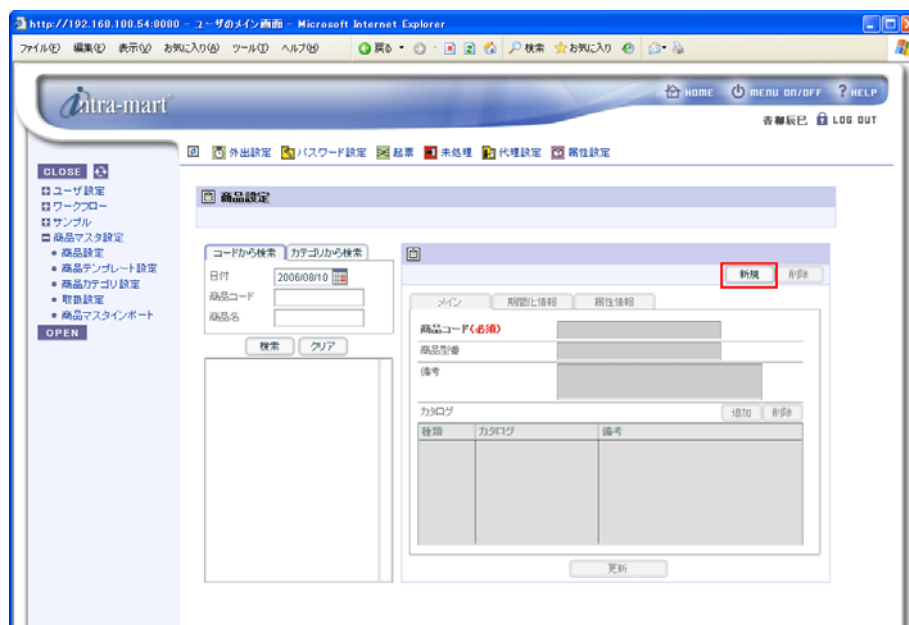
"Service" information can be added to registered products as a single unit or a set. While the product master holds basic information of the product, service information is for actual trading. This information can be used to set different prices for each counterparty and manage the history. Set roles, companies, organizations, and public groups as counterparties and specify privileges for them.



1.9.2 Product Settings

This section describes how to register product information in the product master. The product settings support the terminable information. To add the terminable information, use the [Terminable information] tab. Templates which includes attribute information can be used in this tab. These templates must be created in advance.

- 1 Select [Product master settings] - [Product settings]. To register a new product, click the [New] button. Registered product information can be searched and displayed on the left of the screen. Products can be searched with product codes or categories.



2 Enter basic information of the product on the [Main] tab.

Product code (required)

An automatically generated code is displayed as the product code. It can be modified as required.

Product number

Enter the product number.

Remarks

Enter remarks on the product.

Catalog

Enter catalog information of the product. This item can also be entered in the edit screen after you have registered the product.

3 Click the [Terminable information] tab and enter detailed information of the product.

[Add] button

The start date is set to the current date and the end date is set to the maximum valid date of the system as the default. Click this button to add a period. When adding a period, the end date of the previous period is automatically set and the new period can be set from the following date.

[Modify] button

Click to modify the start date of the selected period on the list.

[Delete] button

Click to delete the selected period on the list.

(List of the periods)

Enlarge

Revocation date

Product name (required)

Product name alias (required)

Sale unit price

Cost unit price

When multiple periods are registered, only the start dates of periods are displayed. The profile of the selected period is displayed below.

Check the box to enlarge the display of the list of periods.

As default, the start date of a period is the registration date and the end date is the maximum valid date of the system. When a period is added, the previous day of the start date of the new period is set as the end date of the previous period, hence the new period continues on the consecutive date. Use this button to forcibly specify the end date. Click the [Clear] button to erase the existing revocation date.

The product code is displayed as the default. It can be overwritten. This information supports internationalization; select a language from the combo box and enter the corresponding name as required.

Enter the alias of the product. This information also supports internationalization; select a language from the combo box and enter the corresponding alias as required.

Enter the sales unit price as the basic information. To register the sales price for target organizations, use the [Service settings] screen.

Enter the cost unit price as the basic information. To register the cost price for target organizations, use the [Service settings] screen.

- 4** Click the [Attribute information] tab and enter attribute information of the product.
In order to register attribute information of a product, it is required to create a product template in advance and specify the template in this screen. In addition, it is required to enter attribute values for all languages using the combo box since the attribute value supports internationalization.

[Select template] button

In order to register the attribute, it is required to apply a template with defined attribute items. Click this button to display the [Select template] dialog box. To cancel the applied template, click the [Delete template] button.

Attribute name	Attribute names set on the applied template are displayed.
Attribute value	Enter an attribute value of this product. The entered settings will comply with the specified data type.
Data type	Data types set on the applied template are displayed.
Description	Descriptions set on the applied template are displayed.
[Register] button	Click this button when you have completed all entries to register the product information.

5 Click the [Register] button to register the product information.

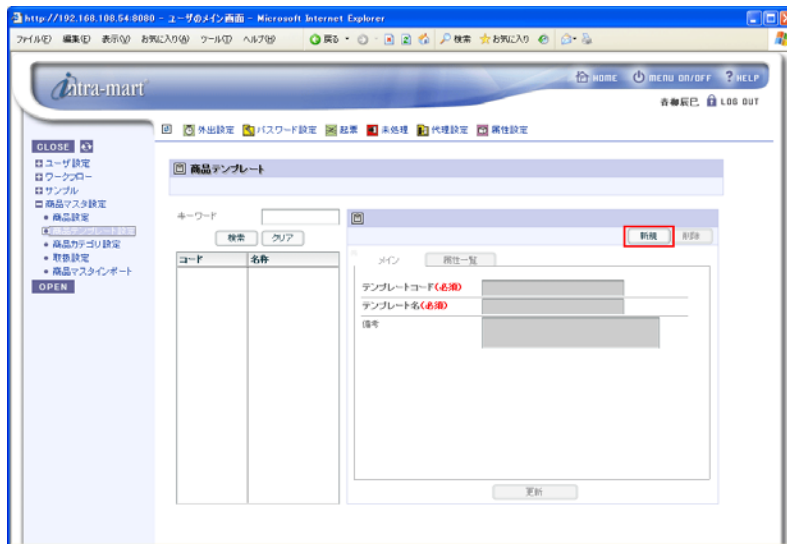


1.9.3 Product Template Settings

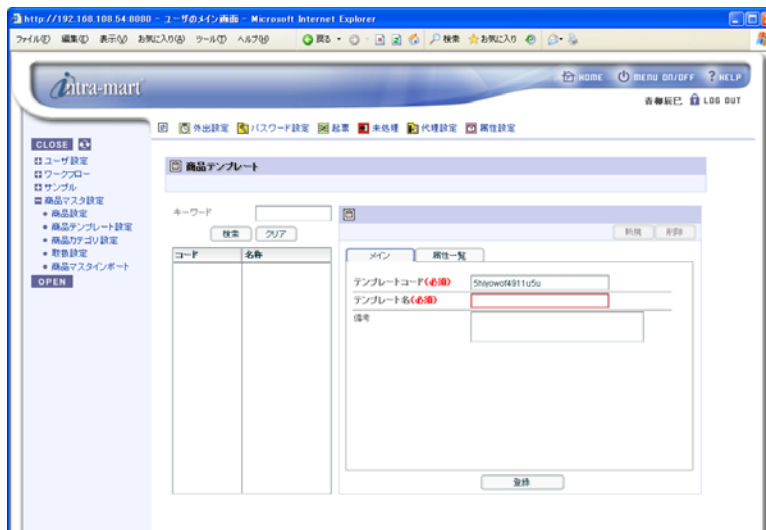
In order to register attribute information of a product, it is required to create a product template in advance.

- 1 Select [Product master settings] - [Product template settings]. To register a new product template, click the [New] button.

Registered product template can be searched and displayed on the left of the screen. Product templates can be searched with the template name or a keyword (partial match).



- 2 Enter basic information of the product template on the [Main] tab.



Template code (required)

An automatically generated code is displayed as the product template code. It can be modified as required.

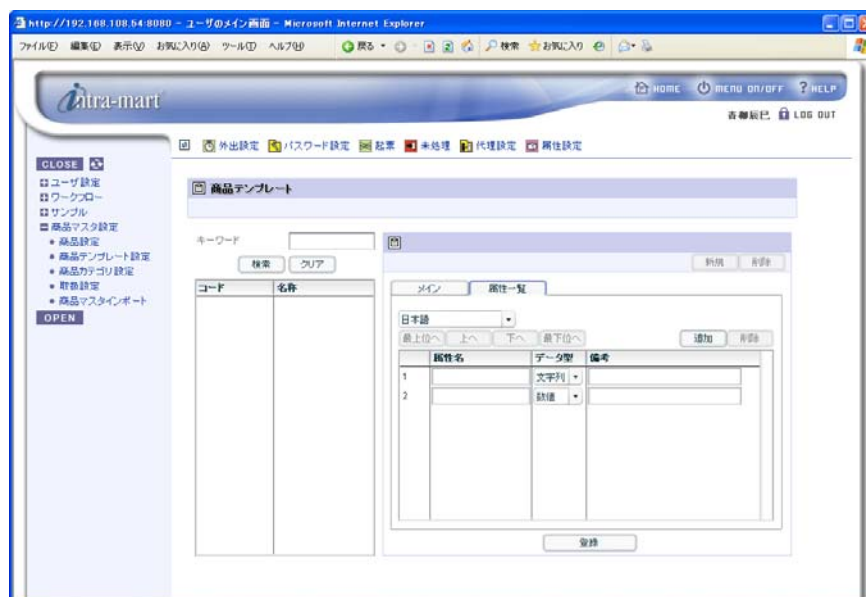
Template name (required)

Enter the product template name.

Remarks

Enter remarks on the product template.

3 Click the [List of attributes] tab and enter detailed information of the product template.



[Add] button

Click to add a line of an attribute.

[Delete] button

Click to delete the selected attribute line. Click the number displayed at the top to select an attribute line.

[Top] button

Click to move the selected attribute line to the top of the list of attributes. Click the number displayed at the top to select an attribute line.

[Up] button

Click to move the selected attribute line up by a line. Click the number displayed at the top to select an attribute line.

[Down] button

Click to move the selected attribute line down by a line. Click the number displayed at the top to select an attribute line.

[Bottom] button

Click to move the selected attribute line to the bottom of the list of attributes. Click the number displayed at the top to select an attribute line.

Attribute name

Enter the attribute name.

Data type

Select either "String type" or "Data type" as the attribute data type.

Remarks

Enter remarks on the attribute.

[Register] button

Click to register the product template.

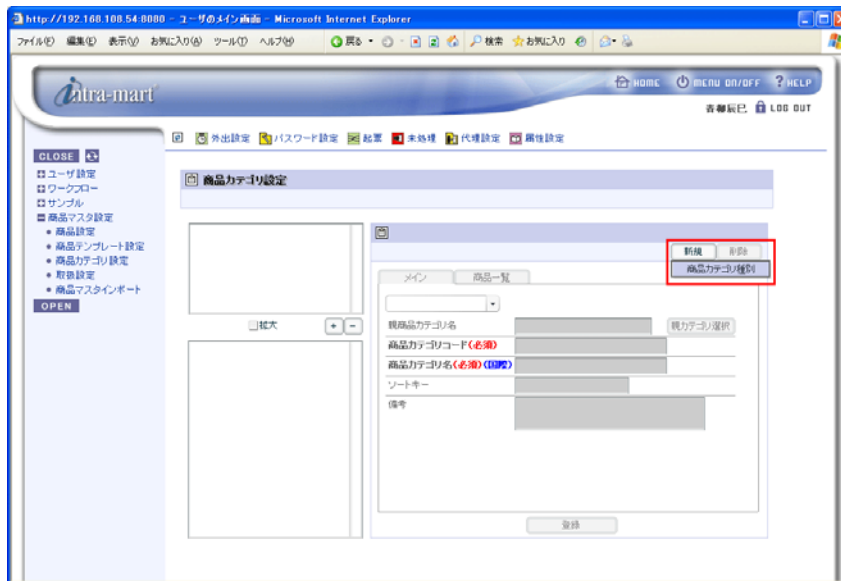
4 Click the [Register] button to register the product template.



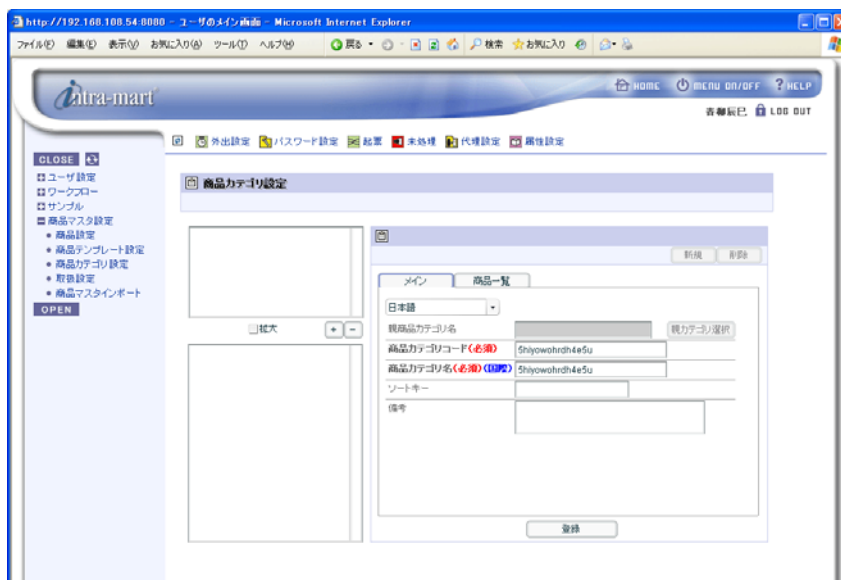
1.9.4 Product Category Settings

The "product categories" are used to group product information. This section describes how to create product categories and how to register products. Product categories are grouped by "product category types". Therefore, "product category types" must be registered first.

- 1 Select [Product master settings] - [Product category settings]. Create a product category type before registering a new product category. Click the [New] button and select [Product category type]. Registered product category types are displayed in the top left section of the screen, and registered product categories are displayed below them.



- 2 Enter product category type information on the [Main] tab.
You cannot enter in the [Product list] tab before registering a product category type.



Product category code (required)

An automatically generated code is displayed as the product category code. It can be modified as required.

Product category name (required)

Enter the product category type name.

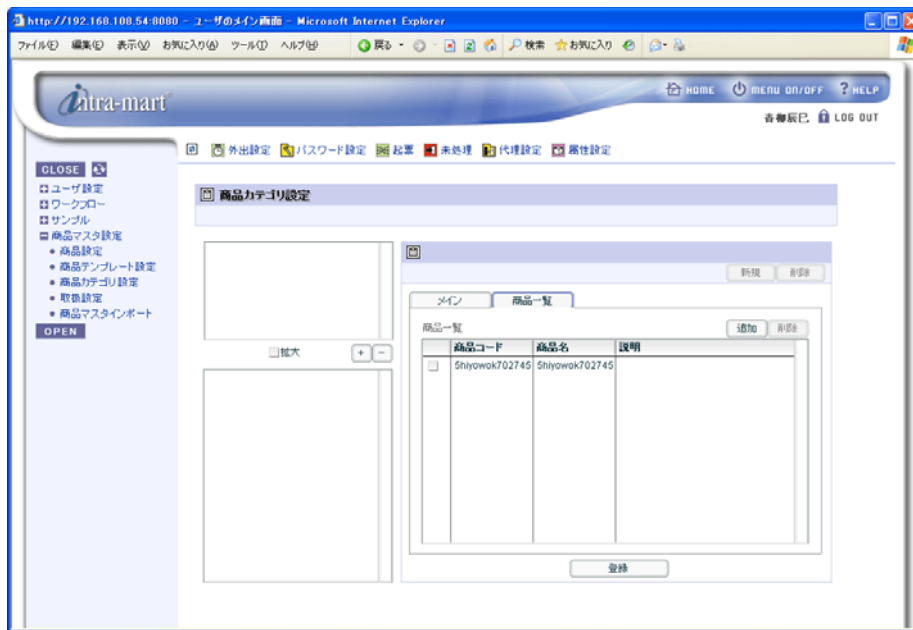
Sort key

Enter a number to indicate the display order of this item in the product category type column.

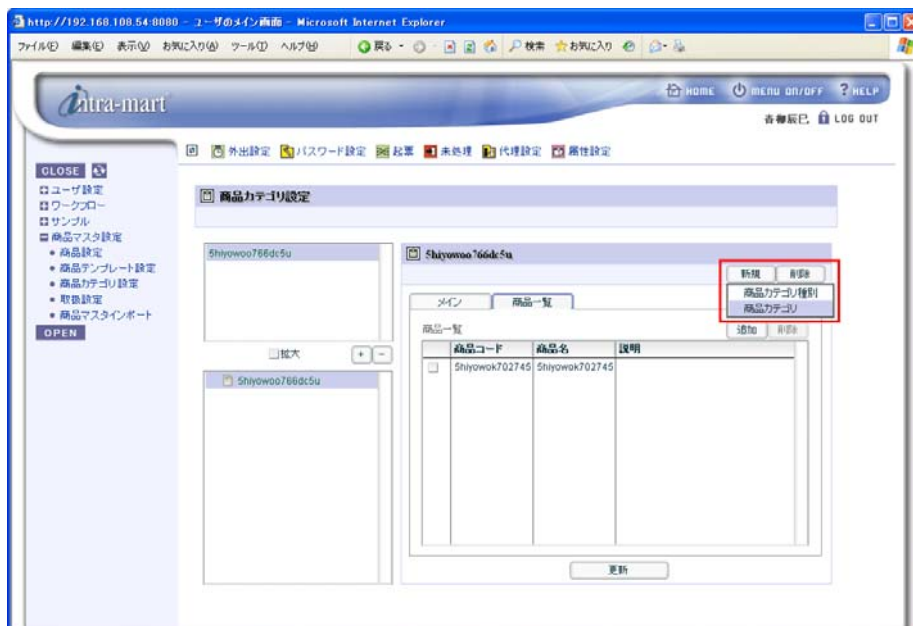
Remarks

Enter remarks on the product category type.

- 3 Click the [Register] button once you have entered all items for the product category type. The registered product category type is displayed in the list at the top left.



- 4 Select a product category type in the list of product category types, click the [New] button and select [Product category].



5 Enter product category type information on the [Main] tab.

Product category name

The parent category of the product category to be registered is displayed. When there are two or more product categories, click the [Select parent category] button to select where to create a new category.

Product category code (required)

An automatically generated code is displayed as the product category code. It can be modified as required.

Product category name (required)

Enter the product category name.

Sort key

Enter a number to indicate the display order of this item in the product category column.

Remarks

Enter remarks on the product category.

6 Click the [Product list] tab to select products to register to the product category you have created.

[Add] button

Click this button to select a product.
Search registered products by product code or by category in this screen.
When the product is displayed, select the check box and click the [Add] button.

商品一覧

コードから検索

カテゴリから検索

日付

2006/08/10

商品コード

商品名

検索

クリア

	商品コード	商品名	型番	説明
<input checked="" type="checkbox"/>	5hiyowok702745	5hiyowok702745	test	

追加

キャンセル

[Delete] button

Click to delete the selected product from the list of product.

Product code

The product code registered to the product master is displayed.

Product name

The product name registered to the product master is displayed.

Description

The product description registered to the product master is displayed.

[Register] button

Click to register the product category.

7 Click the [Register] button to register the product category.



1.9.5 Service Settings

"Service" information can be added to registered products as a single unit or a set. While the product master holds basic information of the product, service information is for actual trading. This information can be used to set different prices for each counterparty, and manage the history. Set roles, companies, organizations, and public groups as counterparties and specify privileges for them.

- 1 Select [Product master settings] - [Service settings]. To register a new service, click the [New] button. Registered service settings are displayed on the left of the screen.

- 2 Enter basic information of the service on the [Main] tab.

[Add] button

[Modify] button

The start date is set to the current date and the end date is set to the maximum valid date of the system as the default. Click this button to add a period. When adding a period, the end date of the previous period is automatically set and the new period can be set from the following date. Click to modify the start date of the selected period on the list.

[Delete] button

Display enlarged

(List of the periods)

Service code (required)

Service name (required)

Customer (required)

Click to delete the selected period on the list.

Check the box to enlarge the display of the list of periods.

When multiple periods are registered, only the start dates of periods are displayed. The profile of the selected period is displayed below.

An automatically generated service code is displayed. It can be modified as required.

Enter the name of this service.

Select the customer of this service. Search from the list or the tree in the organization search screen.

組織検索

一覧 ツリー ☐コード表示 ☐拡大

検索対象 ☐コード検索 ☒名称検索

キーワード 検索

☐ 組織名

- ☐ サンプル会社
- ☐ サンプル会社 / サンプル部門01
- ☐ サンプル会社 / サンプル部門01 / サンプル課11
- ☐ サンプル会社 / サンプル部門01 / サンプル課12
- ☐ サンプル会社 / サンプル部門02
- ☐ サンプル会社 / サンプル部門02 / サンプル課21
- ☐ サンプル会社 / サンプル部門02 / サンプル課22

決定 キャンセル

Service type

Unit price (required)

Currency

Remarks

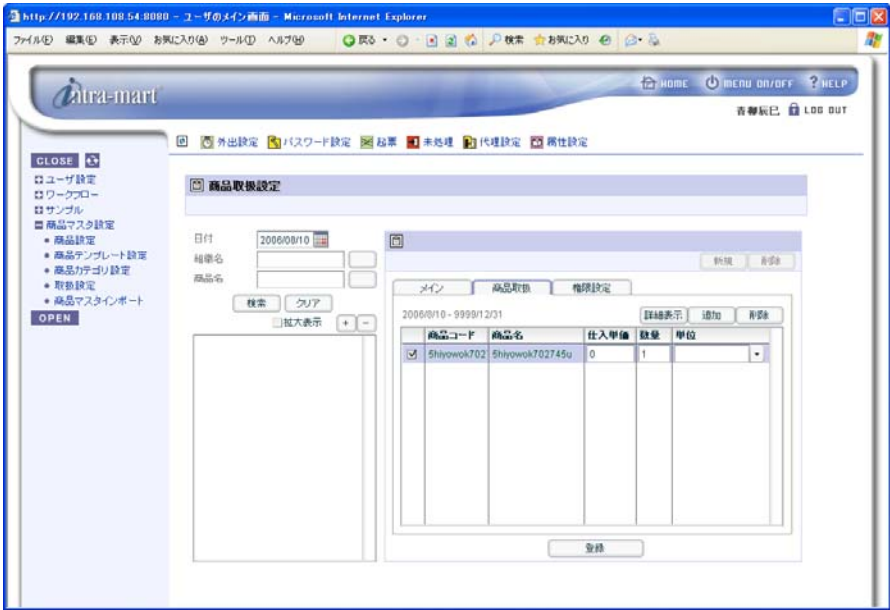
Select either [Sell] or [Buy] as the service type.

Enter the unit price of this service. Click the [Automatic calculation] button to sum the total of multiple products registered on the [Product service] tab.

Select a currency from the combo box.

Enter remarks on the service.

3 Click the [Product service] tab and enter the product.



Display details

Detailed information of the selected product is displayed.

商品詳細

期間

< 2006/08/10 - 9999/12/30 >

商品コード

Shiyowok702745u

商品名

Shiyowok702745u

商品名通称

商品型番

test

販売単価

0

円

仕入単価

0

円

備考

OK

[Add] button

Click this button to add a product.

Search a product in this screen and click the [Add] button to select the product.

商品一覧

検索条件1

検索条件2

日付

2006/08/10

商品コード

商品名

検索

クリア

商品コード	商品名	商品型番	説明

追加

キャンセル

[Delete] button

Click to delete the selected product from the list of product.

Product code

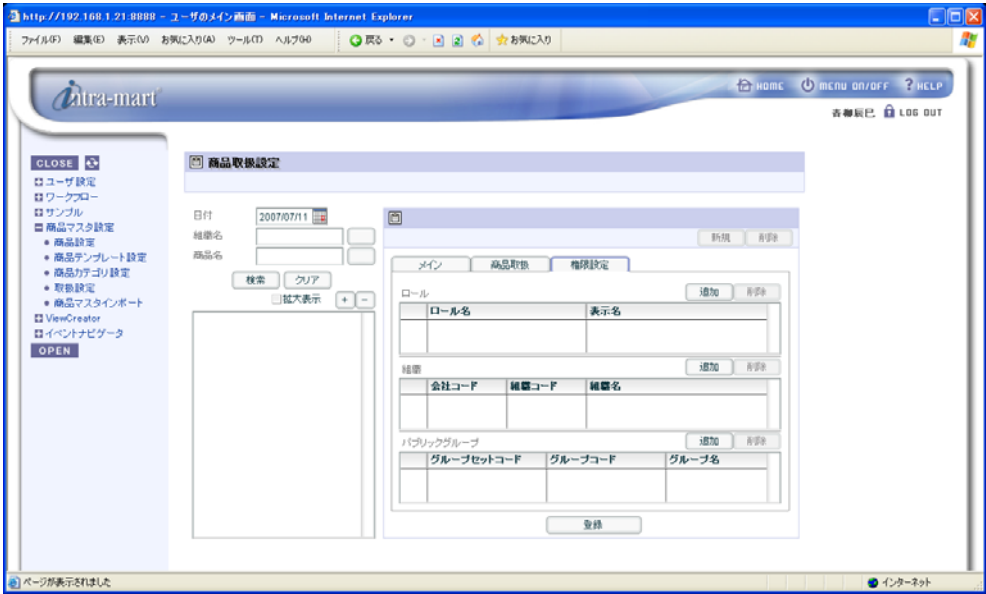
The code of the product is displayed.

Product name

The name of the product is displayed.

Sale unit price	Enter the unit price for this service.
Quantity	Enter the quantity for this service.
Units	Enter or select the units for this service.

- 4 Click the [Privilege settings] tab to specify privileges for this service.
Set privileges on roles, organizations, and public groups by using the corresponding [Add] button.



Role Only users with specified roles are granted privileges on this service.

ロール検索

カテゴリ

ロール名

☐ コード表示

<input type="checkbox"/>	カテゴリ	ロール名	表示名
<input type="checkbox"/>		bpwsuper	ワークフロー管理者
<input type="checkbox"/>		guest	ゲストロール
<input type="checkbox"/>		level1	レベル1ユーザ
<input type="checkbox"/>		level2	レベル2ユーザ
<input type="checkbox"/>		level3	レベル3ユーザ
<input type="checkbox"/>		userSetting	ユーザ設定ロール

決定 キャンセル

Organization Only specified organizations are granted privileges on this service.

組織検索

一覧 ツリー ☐ コード表示 ☐ 拡大

検索対象 ☐ コード検索 ☒ 名称検索

キーワード 検索

<input type="checkbox"/>	組織名
<input type="checkbox"/>	サンプル会社
<input type="checkbox"/>	サンプル会社 / サンプル部門01
<input type="checkbox"/>	サンプル会社 / サンプル部門01 / サンプル課11
<input type="checkbox"/>	サンプル会社 / サンプル部門01 / サンプル課12
<input type="checkbox"/>	サンプル会社 / サンプル部門02
<input type="checkbox"/>	サンプル会社 / サンプル部門02 / サンプル課21
<input type="checkbox"/>	サンプル会社 / サンプル部門02 / サンプル課22

決定 キャンセル

Public group

Only specified public groups are granted privileges on this service.

パブリックグループ検索

一覧 ツリー

☐コード表示 ☐拡大

検索対象 ☐コード検索 ☒名称検索

キーワード

☐グループ名

☐サンプル\パブリック

☐サンプル\パブリック\チームA

☐サンプル\パブリック\チームA\パブリックグループa

☐サンプル\パブリック\チームA\パブリックグループb

☐サンプル\パブリック\チームB

☐サンプル\パブリック\チームB\パブリックグループc

☐サンプル\パブリック\チームB\パブリックグループd

[Register] button

Click this button to register the service.

5 Click the [Register] button to register the service.



1.9.6 Importing the Product Master

Import product master information (product templates, products, product categories, and product category types) in this screen. Enter the path to the file that you want to import, and click the [Import] button.

項目	ファイル
<input type="checkbox"/> 商品テンプレート	
<input type="checkbox"/> 商品	
<input type="checkbox"/> 商品カテゴリ	
<input type="checkbox"/> 商品分類	

インポート

<Product common master import screen>

1.10 Batch Management Operations

Create a batch program which describes logics to execute as a batch, and specify the date and time to run the batch in the batch settings screen. Batch settings can be carried out using the menu in [System settings] - [Batch scheduler] folder.



- It is not possible to perform functions associated with the screen and web mechanism (file download, etc.).
- The Schedule Service must be running in order to use batch management modules.
- It is required to set the intra-mart definition file (imart.xml) to use the batch function.



1.10.1 Creating and Registering a Batch Program

The following describes how to create and register a batch program.

1 Creating and saving a batch program

2 Registering the batch process

3 Batch management control (starting and stopping the batch function)

<Flow for creating and registering a batch program>

1

Create a batch program using JavaScript.

Create a function container which describes the batch program.



- The batch management module automatically executes the `init()` function written in the function container at the specified time.

Write the `init()` function in the same way as you do in a general function container.

```
function init(argV) {...}
```

The batch start information is passed as an argument in the form of an object.

2

Or, create a batch program using Java.

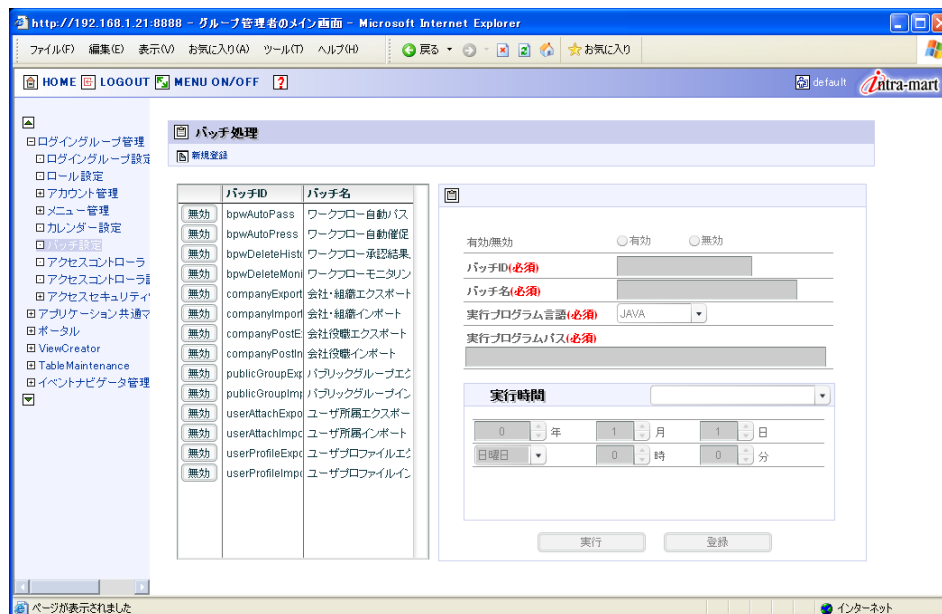
Create a class which describes the batch program.



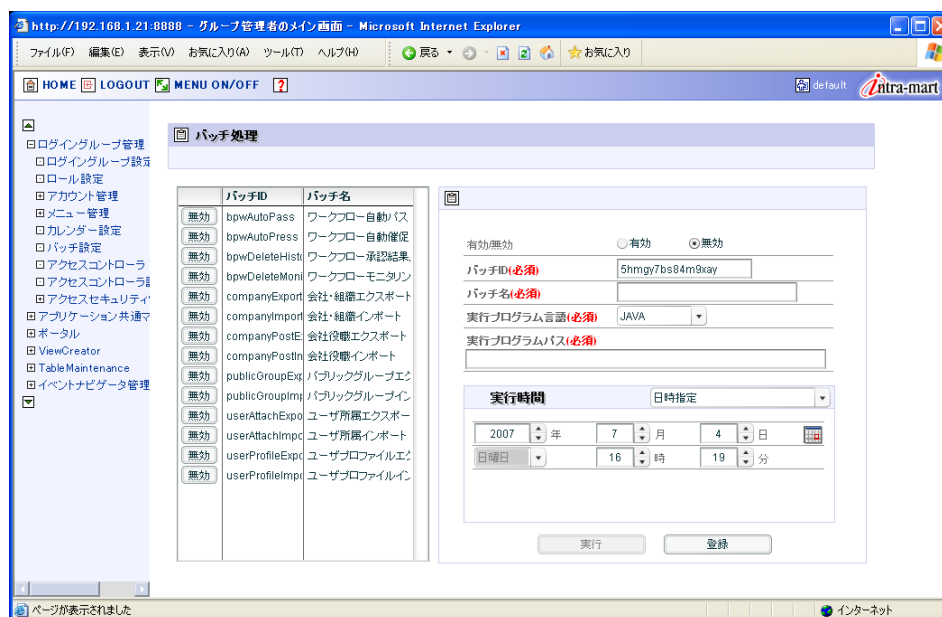
- Create by implementing `jp.c.intra_mart.foundation.service.provider.batch.ProcedureComponent`. For detail information on the interface specifications, refer to the API list.
- Once you have created the class, compile it and store in the directory specified by the class path in an environment where Application Runtime is running.

3 Register the batch program.

Register the batch program you have created. In order to register a batch process, select [Login group settings] - [Batch settings] and click the [Add new] icon.



<[List of batch processes] screen>



<Add new batch program screen>

Enabled/Disabled

Batch ID (required)

Batch name (required)

Executable program language
(required)

Executable program path
(required)

Execution time

[Execute] button

[Register] button

Enable or disable the batch program.

The batch program ID is displayed. Use as it is in general.

Enter a name for the batch program.

Select the program language used to create the batch program. Select either Java or JavaScript.

Enter the path to the batch program you have created in step 1.

Specify the date and time to run the batch program.

Click to run the registered batch program immediately. This button is not available for a new batch program until you have registered it.

Click to register the batch program.

4 Start and stop a batch program.

Click the [Enabled/Disabled] button on the list of batch programs or on the batch program details screen to set it to [Enabled].



- To run the batch program immediately, click the [Execute] button regardless of the [Enabled/Disabled] setting.

1.11 Calendar Settings

Calendar settings manage days of the week, the company's own holidays and business days. Multiple calendars can be set by adding more calendar IDs in this screen, thus enabling application software to use different calendars for HQ, factories, etc. This section describes how to set a calendar.



1.11.1 Adding Calendar Data

A calendar is registered with basic calendar setting data such as general holidays. The following describes how to add your own data in it.

- 1 Click [Login group administration] - [Calendar settings].
The [Update calendar] screen is displayed.

<Calendar master maintenance screen>

2 Click [Add new].

The add new screen is displayed in the right frame. The update/delete screen is displayed in the right frame if you have selected an existing item.

<Calendar master maintenance screen>

Calendar ID (required)

A calendar can be registered with multiple calendar settings. Select in which calendar setting you want to register new data.

Data ID (required)

An internal code for the calendar data. Use as it is in general.

Data type (required)

This calendar has [Name], [Holiday], [Working day], and [Public holiday] categories. Select from these four categories.

Data name (required)

Enter the data name.

Date

Enter when you are specifying date for the data.

Which week of the month

Enter if this data applies on a particular week of the month.

Which day of the week

Use this item as a set with the day of the week below. Enter when you specify a particular day of the week in the particular week of the month.
Example: The second Wednesday in the month.

Day of the week

Enter when you are specifying day of the week.

Start year, end year

Enter the period of validity of the data.

Plug-in function

A function to determine a special condition to enable this setting. Select from the provided plug-in functions.

Display name (required)

Multiple languages are supported. Switch between the registered languages to enter the display name.

Display color (required)

Select the color for displaying this data on the calendar. Click the [Check display] button to see how it is displayed.



1.11.2 Add a New Calendar Setting

This section describes how to register a new calendar setting apart from the provided standard settings.

1 Click [Add new].

The add new screen is displayed in the right frame. Operations are the same as adding calendar data up to this stage.

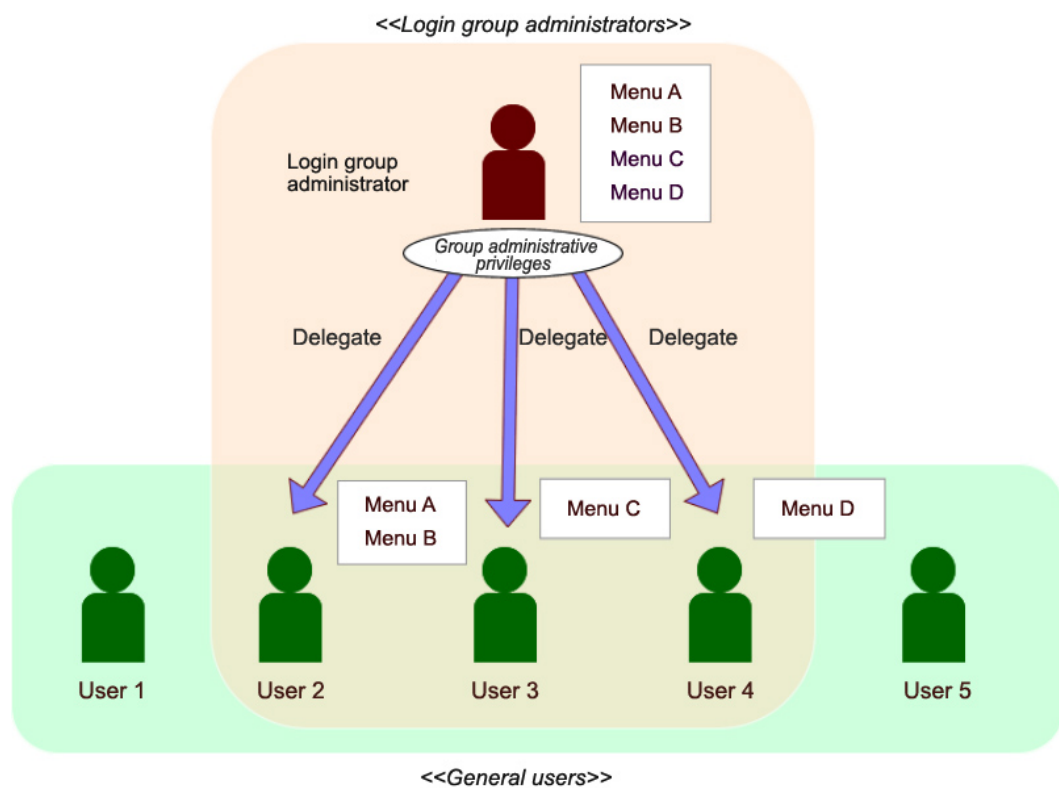
<Calendar master maintenance screen>

- 2 When entering data, enter a new ID rather than selecting an item from [Calendar ID]. Continue to enter items as you do for adding calendar setting data, and click the [Register] button. The data is registered as a new calendar setting.

1.12 Setting Login Group Administrative Privileges Users

Administering a login group by multiple users reinforces the internal control. Operations with multiple login group administrators have become available from iWP/iAF Ver.7.0 for SaaS.

The login group administrator can delegate login group administrative privileges to general users to enable them to administer the login group. When doing so, the login group administrator must assign at least one administrative menu to the general user. The user who has been granted with the privileges would act as a login group administrator as well as a general user.

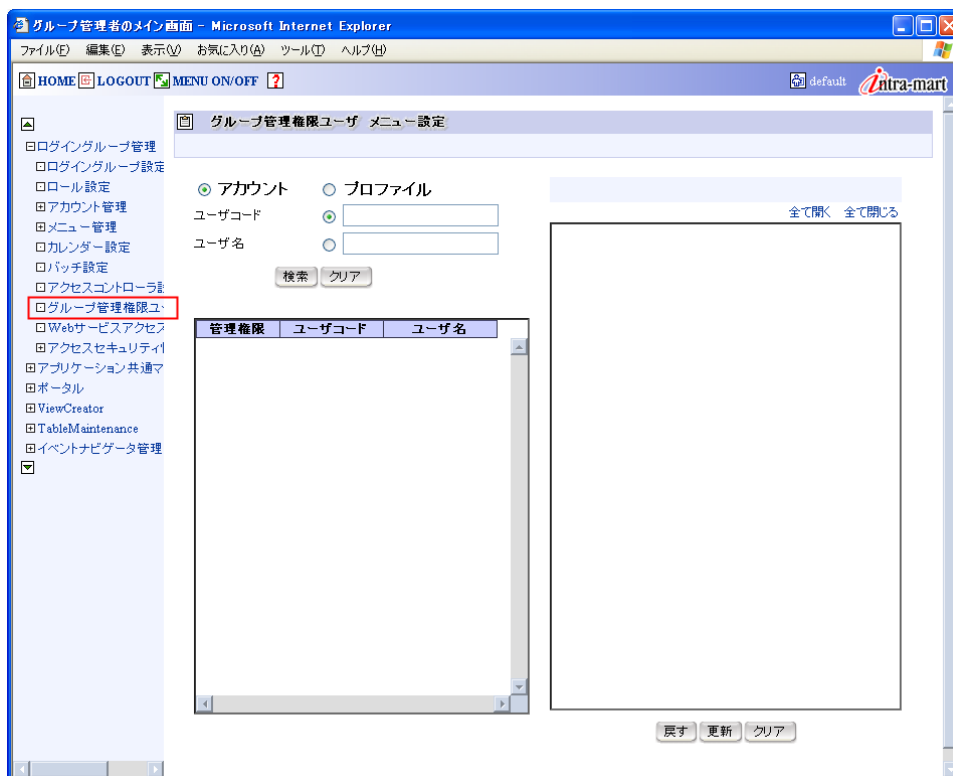


Therefore, administering the login group menu with multiple users can implement more robust security.

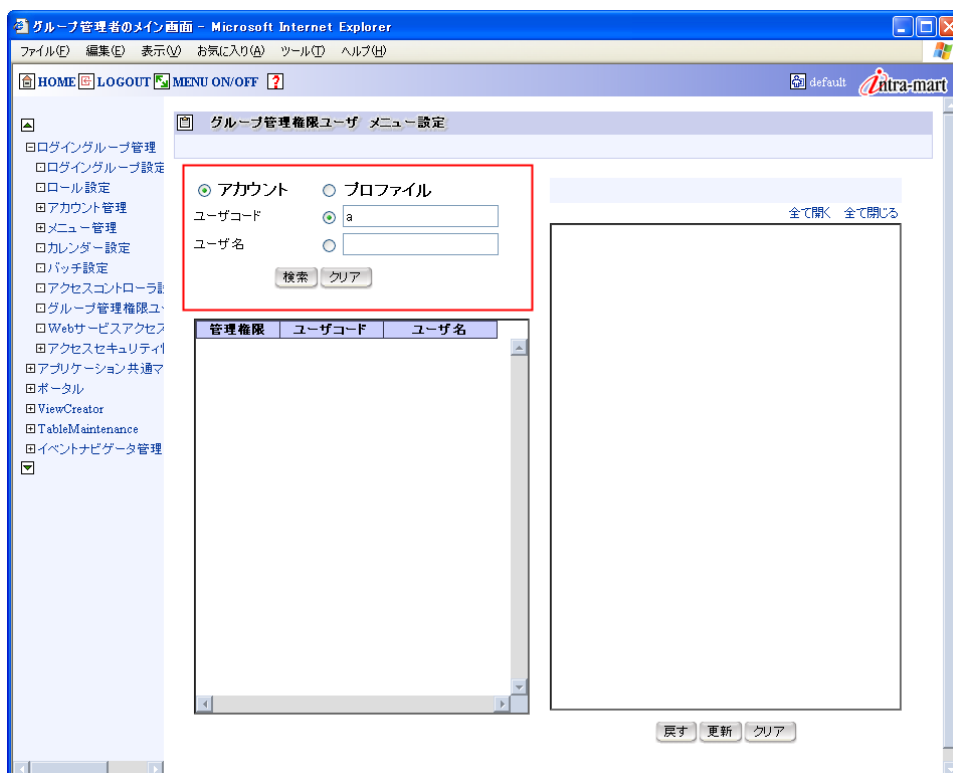


1.12.1 Procedure of Setting Login Group Administrative Privileges Users

- 1 Select [Group administrative privileges user - Menu settings] from the menu.








- 2 Select [Account] or [Profile]. Enter a search keyword in [User code] or [User name]. Click the [Search] button to display a list of users which matches the search condition.



Account	Select this radio button when searching accounts. When selected, enter a keyword to search for only in [User code].
Profile	Select this radio button when searching profiles. When selected, enter a keyword to search for either in [User code] or [User name].
User code	The keyword entry field.
User name	Enter the keyword for the user code to search a user.
	The keyword entry field.
	Enter the keyword for the user name to search a user.
[Search] button	Click to search a user.
	If you click the [Search] button without specifying anything, all users will be displayed.
[Clear] button	Click to erase the list of users from the screen.

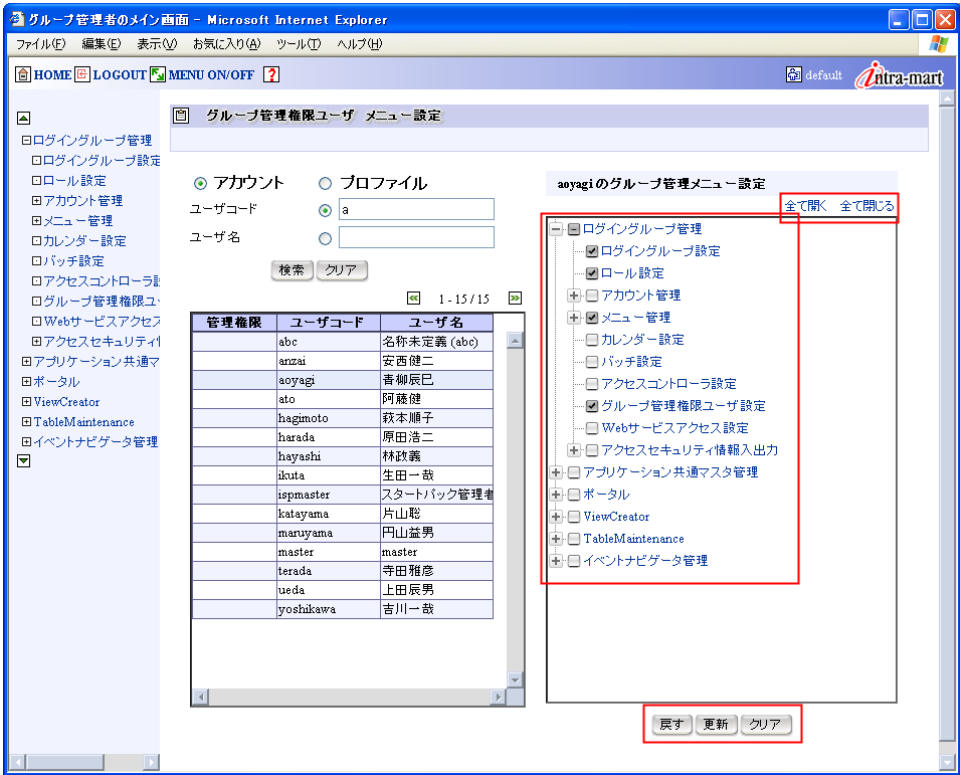


List control	Switch the displayed pages of the list of users. Up to 20 records can be displayed in a page. The following icons are available.  : Displays the next page  : Displays the previous page  : Displays the last page  : Displays the first page
Administrative privileges	The item to distinguish whether the user is a general user or a group administrative privileges user. Group administrative privileges users are displayed with the  icon.
User code	The user code.
User name	The user name.

- 3
- Select a user to grant login group administrative privileges and click the cell in the table.

Select menu items you want the user to administer.

Click the [Update] button once you have finished settings.



- Open all

Close all

Menu (check box)

[Back] button

[Update] button

[Clear] button
- Click to display all items in the menu hierarchy.


Click to close all items in the menu hierarchy.

Select menu items you want the user to administer.


Click to restore the menu selection to the currently registered status.

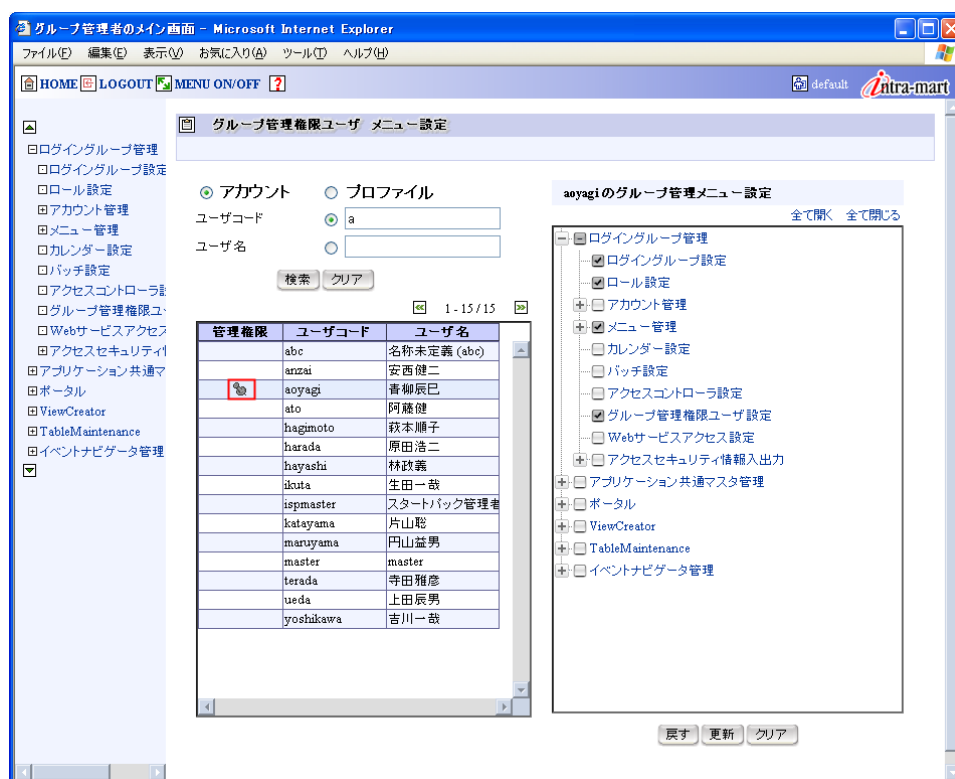
Click to update the group administrative privileges users and the administrative menu. If no menu item is selected, the user's group administrative privileges become void. On the contrary, the user is registered with group administrative privileges as long as at least one menu item is selected.

Click to clear checks from all menu items.



● When delegating login group administrative privileges to a general user, assign the user to administer at least one menu item. Click the [Update] button after you have selected the necessary menu items. Note that the user's login group administrative privileges become void if you click the [Update] button without selecting any menu items.

- 4 After updating login group administrators and administrative menus, check that the administrative privilege icon  is displayed for the updated user in the list of users.

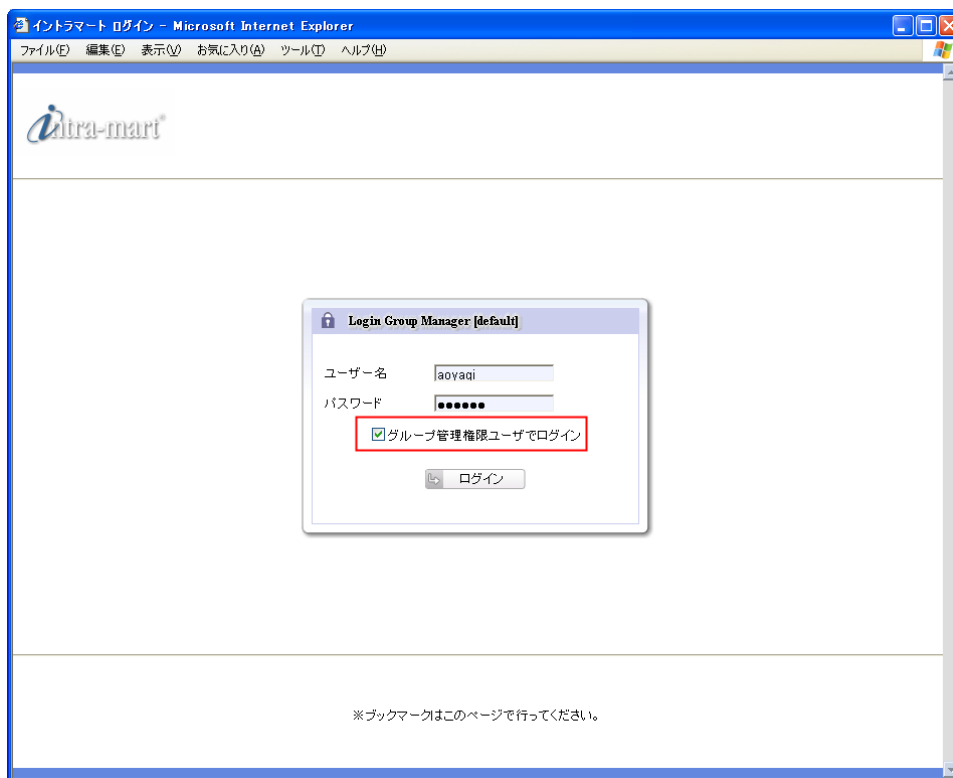




1.12.2 Logging In as Login Group Administrative Privileges User

1 <<Login screen>>

Enter the user name and password of the user with login group administrative privileges, select [Login as group administrative privilege user] and click [Login].



- If you login without selecting the check box, a user authentication error occurs unless you are the original login group administrator. All administrators apart from the original login group administrator must select the check box when logging in. (* The original login group administrator means the login group administrator created by the system administrator when creating the login group.)

2 <<Main page for login group administrative privileges users>>

Only the registered menus are displayed to allow administrative tasks within the scope.



1.13 Web service access settings

Privileges for running web service operations can be granted to a role in intra-mart.

This section describes how to run the web services.

■ Flow for running web services

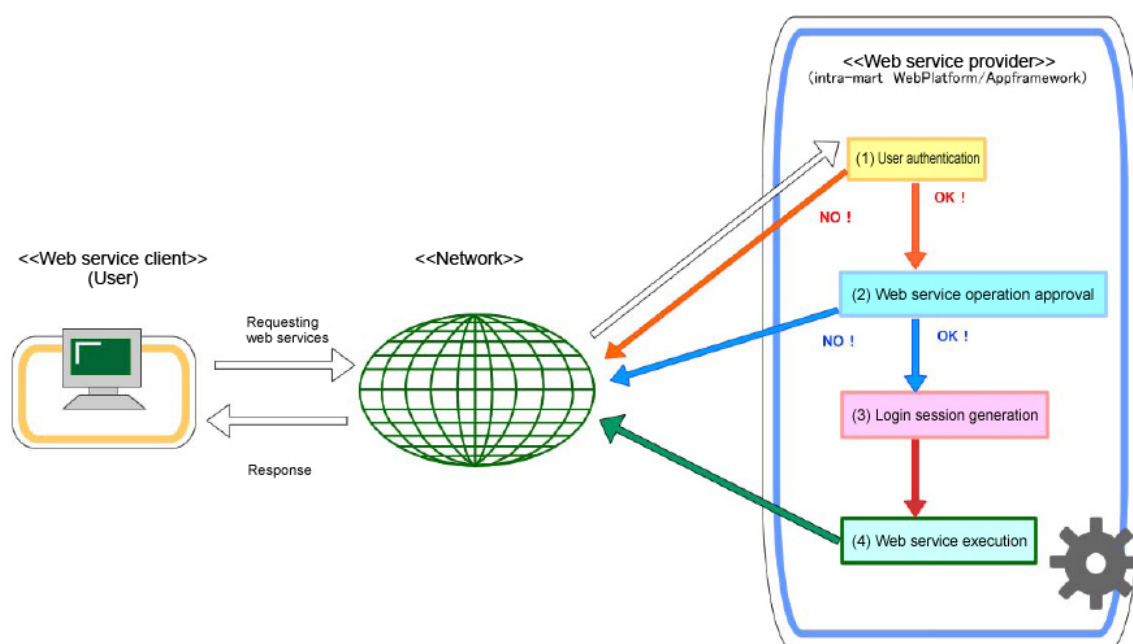
The following diagram indicates the flow for running web services in intra-mart.

First, the web service client (user) requests web services to the web service provider (intra-mart WebPlatform/Appframework).

The web service provider carries out (1) user authentication. If the web service client is authenticated, the process proceeds (2) web service operation approval.

This approval determines if the role of the web service client is granted with the execution privilege of the web service operations. If approved, the process proceeds to (3) generating a login session and (4) running web services.

The execution result of web services is returned to the web service client.



<Flow for running web services>

■ Terminology explanation

Term	Meaning
Authentication	Authentication confirms that the web service client is a legitimate user.
Approval	Approval permits the authenticated web service client to access web service operations. The approval can be set on roles.



1.13.1 Web service access settings

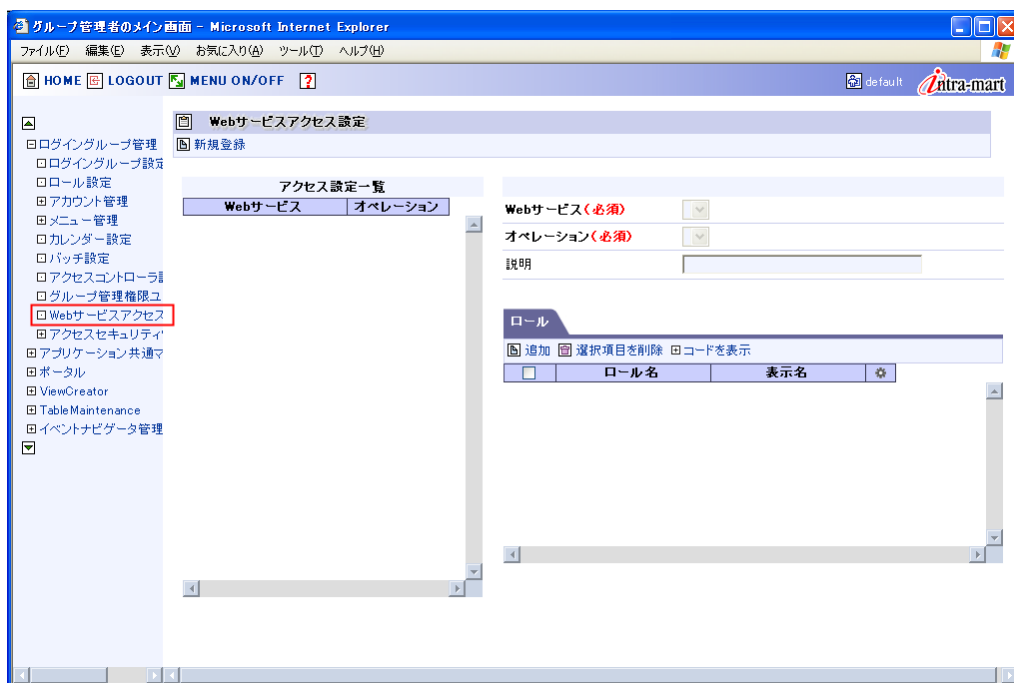
[Web service access settings] is the screen to set approval of the above mentioned web service operations. This screen allows you to set privileges to run any registered web service operations on specific roles.



1.13.2 Web Service Access Setting Procedure

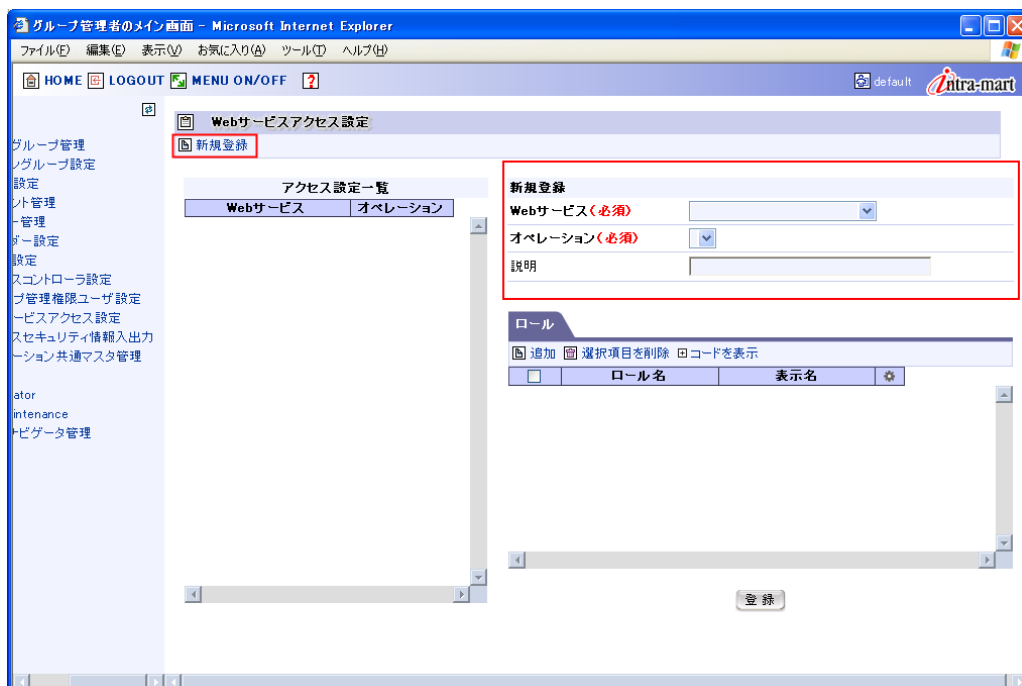
This section describes how to register privileges to run web service operations.

1 Select [Web service access settings] from the menu.

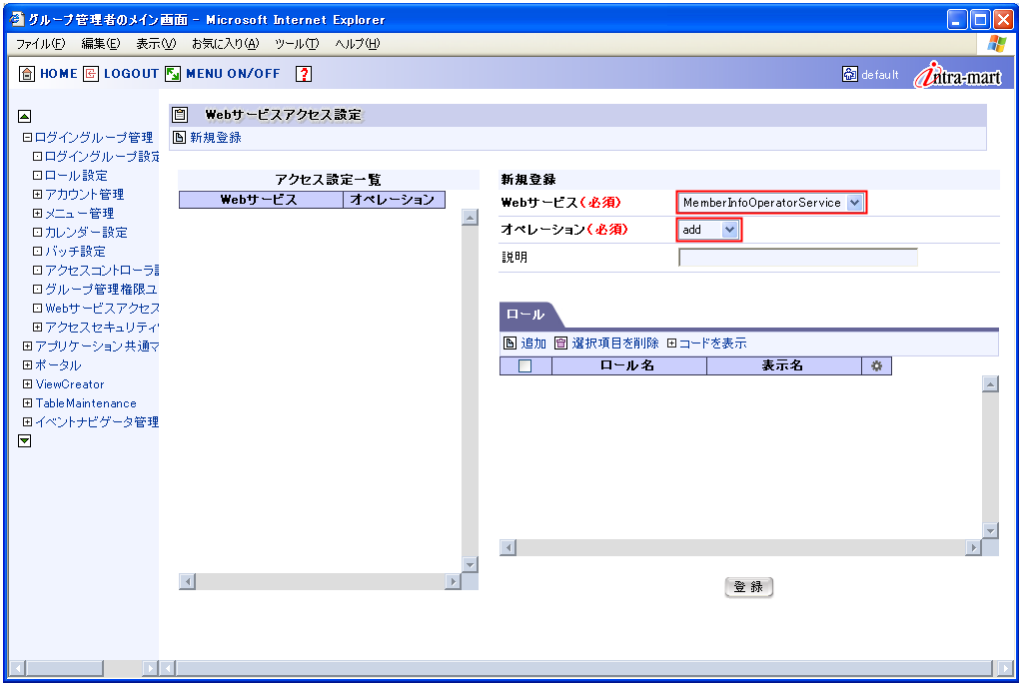


2 Select [Add new].

When [Add new] is selected, the [Add new] screen is displayed in the frame on the right.



3 Select the web service and its operation from [Web service] and [Operation].



Web service (required)	The list of registered web services.
Operation (required)	Operations owned by the above web services.
Description	The description on the web service access settings.

4 Specify the role to be granted with the privileges to run the selected web service operation. To add a new role, click the [Add] button in the [Role] tab.

Role	The role setting tab to permit the web service operation.
Add	Click to add a role to which you permit the web service operation.
Delete selection item	Click to delete the selected role.
Display code	Click to display the code column in the displayed list of roles.

- 5 The [Role search] window is displayed. Select the roles and click the [Select] button.

Role Search window showing a table of roles. The roles listed are:

Category	Role Name	Display Name
	guest	ゲストロール
<input checked="" type="checkbox"/>	level1	レベル1ユーザ
<input checked="" type="checkbox"/>	level2	レベル2ユーザ
<input checked="" type="checkbox"/>	level3	レベル3ユーザ
	userSetting	ユーザ設定ロール

Buttons: 決定 (Select), キャンセル (Cancel)

- 6 The list of the selected roles are displayed on the [Role] tab. Check the settings and click the [Register] button.

Web Service Access Settings window showing a table of roles. The roles listed are:

Role Name	Display Name
level1	レベル1ユーザ
level2	レベル2ユーザ
level3	レベル3ユーザ

Buttons: 登録 (Register)

* Roles can be deleted from the list in two different ways.

Delete with one-click

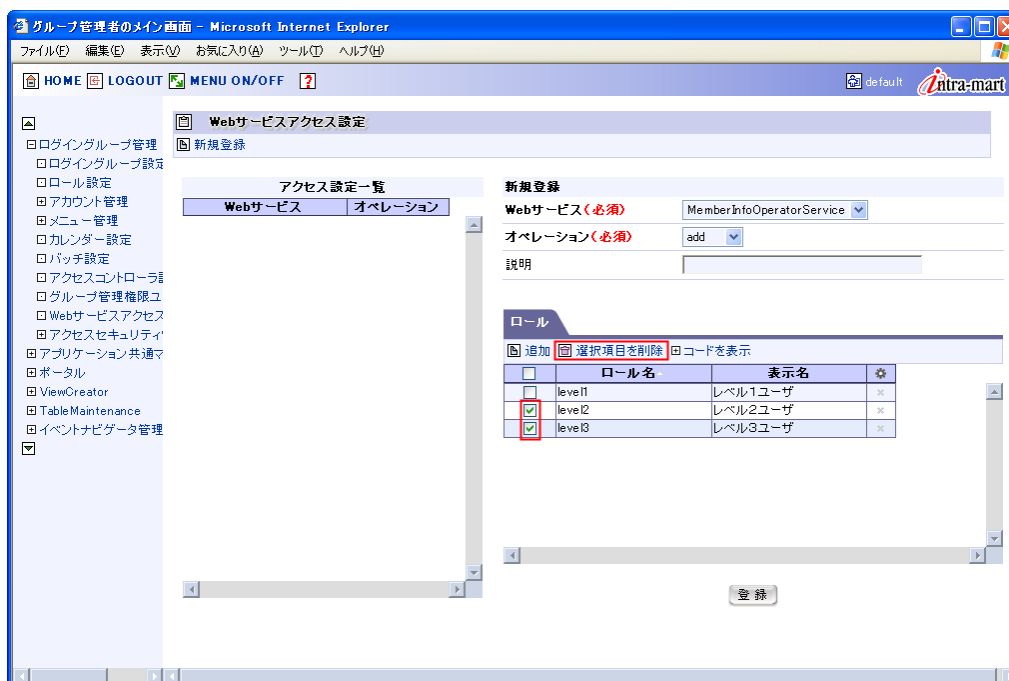
Select the role to delete and click the  icon on the right of the table to delete the line.



Delete all

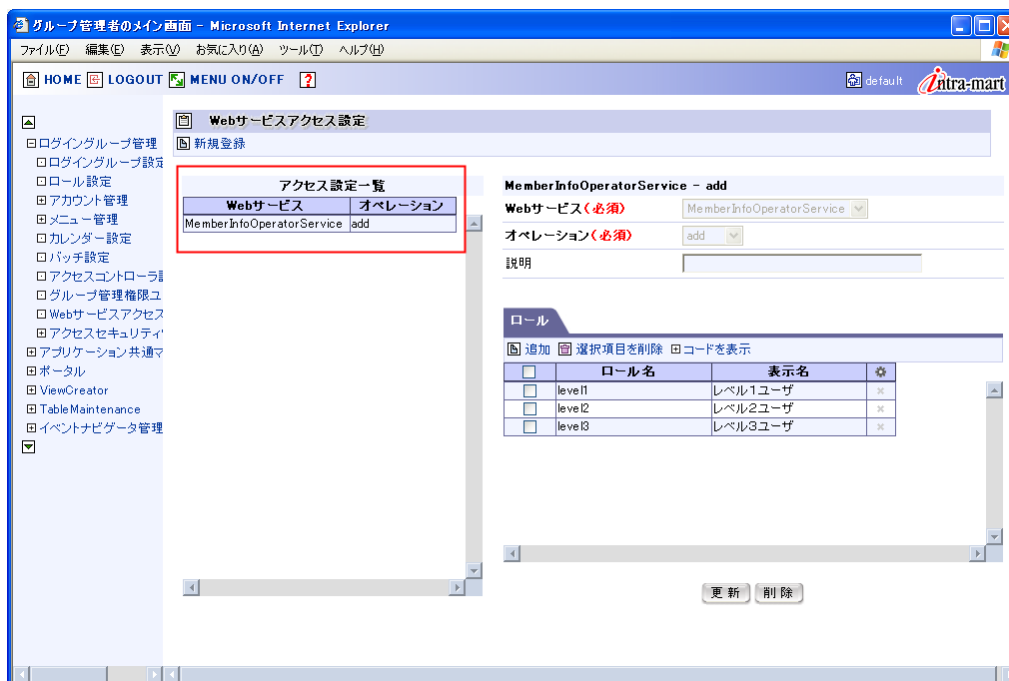
Select the roles you want to delete and select the check boxes on the left of the table.

Click the [Delete selection item] button to delete all selected roles at once.



7 The list of the registered web service access is displayed in the [List of access settings] on the left of the screen.

This completes web service access settings.



- For more details on the intra-mart web services, refer to [Web Service Programming Guide].

1.14 Password Reminder Settings

The password reminder settings can be set for each login group to allow a general user to reset the password in the event of the user's forgetting his/her own password.

This section describes how to set the password reminder function.



1.14.1 Prerequisites

The password reminder function requires an environment where email transmission from the system is possible. Configure the SMTP server, etc. in advance.

The password reminder function can be used only if the client type is a PC mode.



1.14.2 Basic Settings

Password reminder settings include basic settings and mail template settings.

This section describes the basic settings.

Click the [Update] button to reflect the settings.

パスワードリマインダ設定

基本設定	
パスワードリマインダの利用	有効
URLの有効期間(日数)(必須)	3 日間
URLの有効期限日付フォーマット(必須)	yyyy/MM/ddTHH:mm
Fromアドレス(必須)	system-auto-sender
Reply_Toアドレス	system-auto-sender
Cc/Bccアドレス	編集
メールテンプレート	
ロケール	ja 表示

更新

<[Password reminder settings] screen>

Use password reminder

Select whether or not to use the password reminder function.

Default: Enabled

Enabled: The password reminder link is displayed on the general users' login screen.

Disabled: The password reminder link is not displayed on the general users' login screen.

Period of validity of URL (number of days) (required)

Enter the format of the number of days before expiry of the shortcut URL pointing at the password reset screen sent on the password reminder email.

Default: 3 (days)

Date format of period of validity of URL (required)

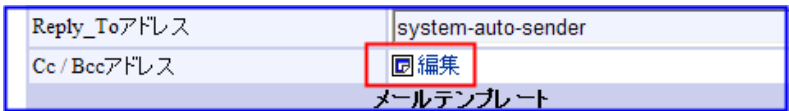
Enter the format of the number of days before expiry of the shortcut URL pointing at the password reset screen sent on the password reminder email.

	<p>The available formats are strings which can be specified on the date (time) patterns of the java.text.SimpleDateFormat class.</p> <p>Default: yyyy/MM/dd 'HH':mm</p> <p> This formats the date as "2008/12/20 21:14" on the email.</p>
From address (required)	<p>Enter the From address of the password reminder email.</p> <p>Default: system-auto-sender</p>
Reply_To address	<p>Enter the Reply_To address of the password reminder email.</p> <p>Default: system-auto-sender</p>
Cc / Bcc address	<p>Enter the Cc and Bcc addresses of the password reminder email.</p> <p>Default: Not specified</p>
[Update] button	<p>Click to update the password reminder settings.</p>

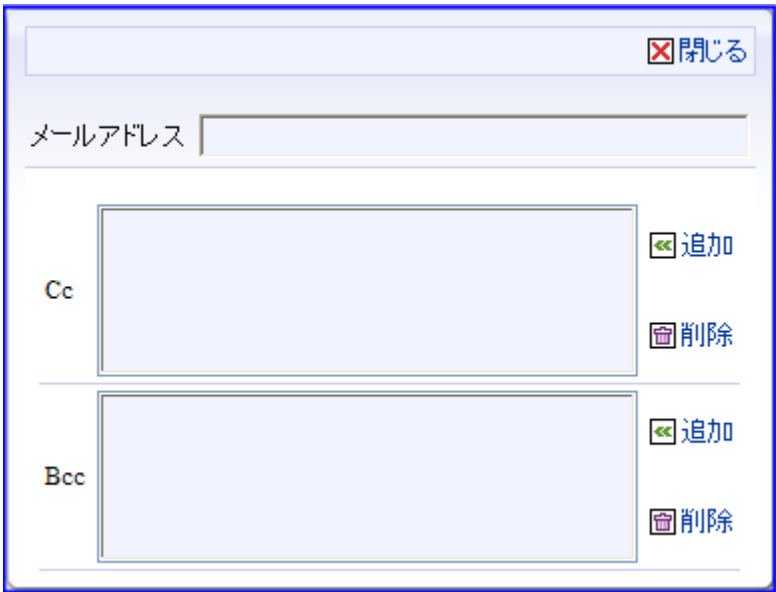
■ Cc / Bcc address settings

A separate window is provided for setting Cc and Bcc addresses.

To display the separate window, click the [Edit] icon.



<[Edit] icon>



<Cc/Bcc settings window displayed by clicking the [Edit] icon>

[Close] button	Click to close the Cc/Bcc address settings window.
Email address	Enter email addresses you want to add to Cc or Bcc. Do not use a comma ",".
Cc: [Add] icon	Click to add the email address entered in the email address text box into Cc.
Cc: [Delete] icon	Click to delete the selected email address from Cc.
Bcc: [Add] icon	Click to add the email address entered in the email address text box into Bcc.
Bcc: [Delete] icon	Click to delete the selected email address from Bcc.



1.14.3 Email Template Settings

This section describes how to set the template for the password reminder email to users when using the password reminder function.

Click the [Update] button to reflect the settings.

<Email template setting items>

Locale	Available locales are displayed.
[Display] icon	Click to display the password reminder email template (fields) of the selected locale.
[Hide] icon	Click the [Hide] icon to hide the password reminder email template (fields).
[Update] button	Click to update the password reminder settings.

■ Password reminder email template

Click the [Display] icon to display the title and body of the password reminder email template of the selected locale.

<Password reminder email template fields>

Title	Enter the title of the password reminder email.
(Body)	Enter the body of the password reminder email. Do not edit replacement strings.



- Replacement strings are displayed for the shortcut URL and the period of validity for the URL.

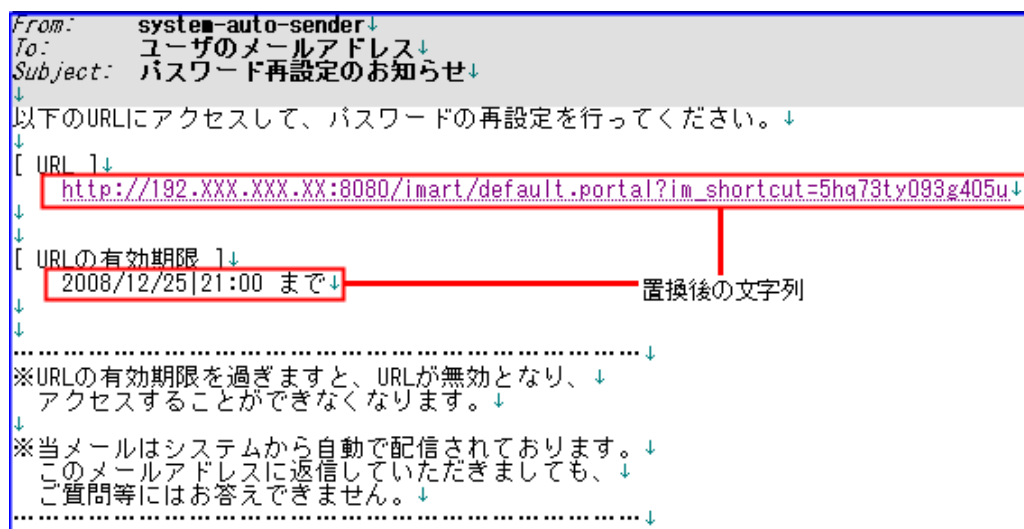
■ Replacement strings

The following are available replacement strings for the password reminder email.

Do not edit replacement strings.

%url	The string is replaced with the shortcut URL to the password reset screen.
%limit	The string is replaced with the period of validity of the shortcut URL to the password reset screen in the format specified in [Date format of period of validity of URL] in the basic settings.

If you have used the default email template, the following email will be transmitted.



1.14.4 Password Reminder Usage Log

With consideration to security, the [Sending email succeeded] message is displayed on the screen whenever a general user uses the password reminder function regardless whether there has been an error or not.

Therefore, information and usage status at an error can be output to a log file.

■ Log output destination and log level

The following describes the log output destination and log level.

Output path	Security log (log/platform/security.log)
Log level	INFO



- The default log level for the security log (log/platform/security.log) is set to "ERROR" by default; therefore, you need to modify the log level to "INFO" in the log setting file (im_logger_security.xml) when you want password reminder log output.

■ Log messages

The following messages are output as the password reminder log.

Message	
[Password reminder] system error [Group/user/email address]	An error has occurred in the program, or, the system is not functioning normally.
[Password reminder] The entered user does not exist or the period of validity has expired. [Group/user/email address]	The user entered in the password reminder screen does not exist, or the period of validity of the user has expired.
[Password reminder] The email address of the entered user is not set. [Group/user/email address]	The user entered in the password reminder screen is not set with an email address.
[Password reminder] Sending email succeeded. [Group/user/email address]	A password reminder email has been successfully sent to a user.
[Password reminder] Sending email failed. [Group/user/email address]	An email transmission to the user failed due to a system error or mail server error.

1.15 Message customization settings

Messages displayed in the intra-mart screens can be replaced with any messages using message customization settings.

This section describes how to customize the messages.



1.15.1 Prerequisites

Only messages which are displayed on the message customization settings screen can be customized.



1.15.2 Message Customization Procedure

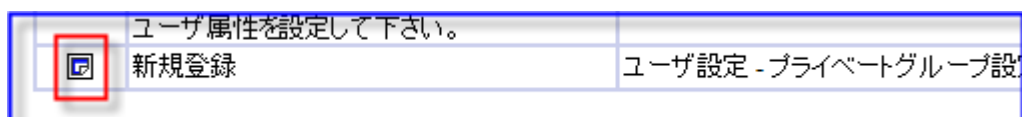
- 1 Select [Message customization settings] from the menu.
A list of customizable messages is displayed.

編集	メッセージ	説明
	1日前から(0)日前	ユーザ設定 - 属性設定 で使用されるラベルです。
	<パスワード期限切れ通知>とは、パスワードの有効期限が迫っていることを「システム」重要なお知らせ」ポータルで通知を行うかの設定です。	ユーザ設定 - 属性設定 で使用されるラベルです。
	<マイメニュー表示位置>とは、マイメニューを表示する位置の設定です。	ユーザ設定 - 属性設定 で使用されるラベルです。
	<メニューフォルダ表示方法>とは、メニューフォルダ名を押下した際のアクションの設定です。	ユーザ設定 - 属性設定 で使用されるラベルです。
	<メニュー初期表示>とは、ログイン時の画面にメニューを表示するかの設定です。	ユーザ設定 - 属性設定 で使用されるラベルです。
	(0)を再設定してください。	ユーザ設定 - 属性設定 で使用されるメッセージです。
	※ログイン後のメニューの表示・非表示の切り換えはトップバーの「MENU ON/OFF」で行えます	ユーザ設定 - 属性設定 で使用されるラベルです。
	かんたんログインが設定されていません。	ユーザ設定 - かんたんログイン設定 で使用されるメッセージです。
	かんたんログインを設定を行いません。	ユーザ設定 - かんたんログイン設定 で使用されるメッセージです。
	かんたんログイン設定	ユーザ設定 - かんたんログイン設定 で使用されるラベルです。
	かんたんログイン設定を取消しました。	ユーザ設定 - かんたんログイン設定 で使用されるメッセージです。
	かんたんログイン設定を行いました。	ユーザ設定 - かんたんログイン設定 で使用されるメッセージです。
	かんたんログイン設定を解除します。	ユーザ設定 - かんたんログイン設定 で使用されるメッセージです。
	アイコン	ユーザ設定 - マイメニュー設定 で使用されるラベルです。
	イメージアイコン選択	ユーザ設定 - マイメニュー設定 で使用されるラベルです。
	エイリアス	ユーザ設定 - マイメニュー設定 で使用されるラベルです。
	エイリアスを入力してください。	ユーザ設定 - かんたんログイン設定 で使用されるメッセージです。
	カナ	ユーザ設定 - プライベートグループ設定 で使用されるラベルです。
	カラーボタン	ユーザ設定 - カラーボタン設定 で使用されるラベルです。
	カラーボタンを変更しました。	ユーザ設定 - カラーボタン設定 で使用されるメッセージです。

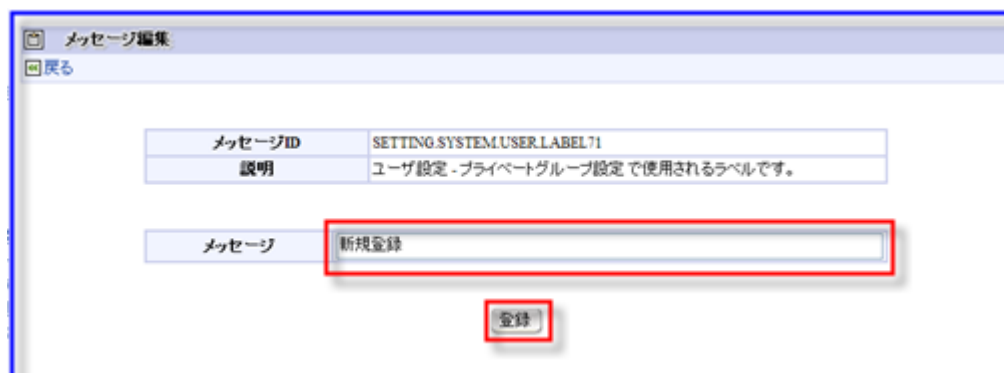
- 2 Search a message.
Enter a message to customize.



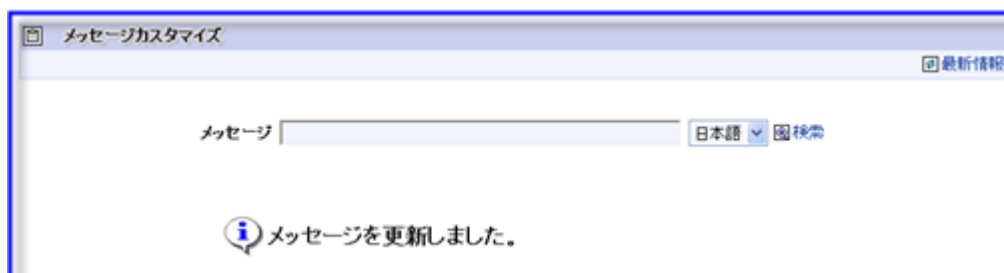
- 3 Select a message.
Select the message to customize from the list of search results.



- 4 Edit the message.
Edit as required and click [Register].



This completes message customization.



Click [Return to standard message] to restore the standard messages.

メッセージID	説明
SETTING.SYSTEM.USER.LABEL.71	ユーザ設定・プライベートグループ設定で使用するラベルです。

メッセージ
新規登録

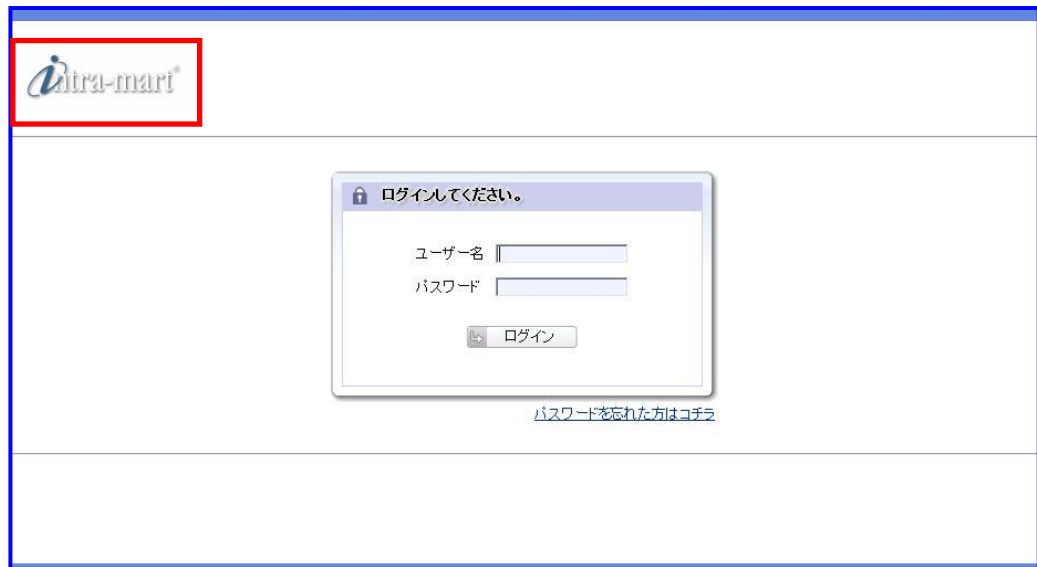
登録 標準のメッセージに戻す

[Return to standard message] is not displayed while you have not customized messages.

1.16 Logo settings

The logo displayed on the intra-mart login screen and in the header section of the main screen can be replaced with any logo for each login group.

This section describes how to set the logo.



<Login screen>



<Header section of the main screen (system default)>



<Header section of the main screen (MainPage510)>



1.16.1 Prerequisites

The replacement logo should be an appropriate size for the place where it is displayed.

- Login screen logo : 161 x 67 pixels



- Header section of the main screen (system default) logo : 203 x 82 pixels



- Header section of the main screen (MainPage510) logo : 110 x 35 pixels





1.16.2 Logo Settings

- 1 Select [Logo settings] from the menu.



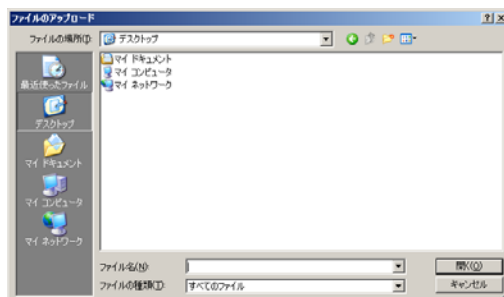
Select the [Login screen logo], [Header screen logo (system default)] or [Header screen logo (MainPage510)] tab which to change.

The following describes the procedure for changing the [Login screen logo].
Other logos can be changed in the same procedure.

The intra-mart default logo is set after the installation.
When changing it, click the [Delete] button to delete the default logo.



- 2 Click the [Browse] button and select an image.



- 3 When you have selected an image, click the [Add] button to register the image.



- To restore the default status, click the [Reset] button.
- If you do not specify a logo image, no logo will be displayed.

Chapter 2 Appendix

2.1

Text Entry Restrictions in Maintenance Screens

This section explains the entry restrictions for text in the intra-mart maintenance screens.



2.1.1 Types of Text Entry Restriction Patterns

The text entry restrictions in the intra-mart maintenance screens take the following pattern. In the following explanation of “applicable fields”, after the entry is a description in the format “Text entry restriction pattern X”.



2.1.1.1 ID and Code Fields (Text Entry Restriction Pattern 1)

Only single-byte alphanumeric characters and some single-byte symbols can be entered.

■ Conditions

- Single-byte numerals (0 to 9)
- Single-byte English (a to z and A to Z)
- Character “_” (0x5f)
- Single-byte hyphens (-)
- Single-byte @ mark
- Single-byte period (.)
- Single-byte plus (+)
- Single-byte exclamation (!)



- Double-byte alphanumeric characters and double-byte underscores are automatically converted to single-byte.



2.1.1.2 Password Fields (Text Entry Restriction Pattern 2)

All single-byte visible text (except for spaces and asterisks (*)) can be entered.

■ Conditions

- Excluding control codes (0x00 to 0x1f, and 0x7f)
- Excluding spaces (0x20)
- Excluding asterisks (*)
- Excluding double-byte Japanese characters



- The user (account) password and mobile password can be restricted to text that can be entered using the password check function in the password history management.



2.1.1.3 URL and Mail Address Fields (Text Entry Restriction Pattern 3)

All visible text characters can be entered except for the space*1.

■ Conditions

Excluding control codes (0x00 to 0x1f, and 0x7f)

Excluding spaces (0x20)

Double-byte Japanese characters can also be entered



- * 1.: As there are Japanese language domains, single-byte alphanumeric character checking is not performed.



2.1.1.4 Color Code Settings Fields (Text Entry Restriction Pattern 4)

Single-byte numerals and single-byte characters A to F can be entered.

■ Conditions

Single-byte numerals (0 to 9)

Single-byte letters (a to f and A to F)



2.1.1.5 Value Input Fields (Sort Keys, etc.) (Text Entry Restriction Pattern 5)

Only numerals can be entered.

■ Conditions

Single-byte numerals (0 to 9) only

Excluding double-byte Japanese characters



2.1.1.6 Names and Notes, etc. (Text Entry Restriction Pattern 6)

All characters that can be entered from the keyboard can be entered.

■ Conditions

Excluding control codes (0x00 to 0x1f, and 0x7f)

Spaces (0x20) can also be entered

Double-byte Japanese characters can also be entered



2.1.1.7 Product Code Fields (Text Entry Restriction Pattern 7)

Only single-byte alphanumeric characters, hyphens, and underscores can be entered.

■ Conditions

Single-byte numerals (0 to 9)

Single-byte letters (a to z and A to Z)

Character “_” (0x5f)

Single-byte hyphens (-)



2.1.1.8 Supplement

■ Control codes

“Control codes” means the following characters.

Characters in the range 0x00 to 0x1f

Character 0x7f (delete)



- These are characters that cannot be shown in the display and which cause a beep to sound when output to console.



2.1.2 Applied Fields



2.1.2.1 Batch Settings

Batch ID → Text entry restriction pattern 1



2.1.2.2 Calendar Settings

Calendar ID	→	Text entry restriction pattern 1
Data ID	→	Text entry restriction pattern 1
Data name	→	Text entry restriction pattern 1
Display color	→	Text entry restriction pattern 4



2.1.2.3 Type Settings

Type code	→	Text entry restriction pattern 1
Sort key	→	Text entry restriction pattern 5



2.1.2.4 Login Group Settings

Login group ID	→	Text entry restriction pattern 1
User ID	→	Text entry restriction pattern 1
Password	→	Text entry restriction pattern 2
Password (confirm)	→	Text entry restriction pattern 2
Page pattern ID	→	Text entry restriction pattern 1
Page URL	→	Text entry restriction pattern 3
Page image URL	→	Text entry restriction pattern 1
Email address	→	Text entry restriction pattern 3



2.1.2.5 Job Title Settings

Job title code	→	Text entry restriction pattern 1
Sort key	→	Text entry restriction pattern 5



2.1.2.6 Company Settings

Company code	→	Text entry restriction pattern 1
Organization code	→	Text entry restriction pattern 1
Email address 1	→	Text entry restriction pattern 3
Email address 2	→	Text entry restriction pattern 3
URL	→	Text entry restriction pattern 3
Sort key	→	Text entry restriction pattern 5



2.1.2.7 Public Group Settings

Group set code	→	Text entry restriction pattern 1
Group code	→	Text entry restriction pattern 1
Sort key	→	Text entry restriction pattern 5



2.1.2.8 Role Settings

Role ID	→	Text entry restriction pattern 1
Role name	→	Text entry restriction pattern 1
Categories	→	Text entry restriction pattern 1



2.1.2.9 System Administrator Settings

User ID	→	Text entry restriction pattern 1
Password	→	Text entry restriction pattern 2
Password (confirm)	→	Text entry restriction pattern 2
Email address	→	Text entry restriction pattern 3



2.1.2.10 Account Settings

User code	→	Text entry restriction pattern 1
Password	→	Text entry restriction pattern 2
Confirm password	→	Text entry restriction pattern 2
Mobile password	→	Text entry restriction pattern 2
Confirm mobile password	→	Text entry restriction pattern 2
Email address 1	→	Text entry restriction pattern 3
Email address 2	→	Text entry restriction pattern 3
Mobile phone email address	→	Text entry restriction pattern 3
URL	→	Text entry restriction pattern 3
Sort key	→	Text entry restriction pattern 5



2.1.2.11 Administrative Menu Settings

URL	→	Text entry restriction pattern 3
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2.1.2.12 Menu Settings

Menu ID	→	Text entry restriction pattern 1
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2.1.2.13 Product Settings

Product code	→	Text entry restriction pattern 7
Product number	→	Text entry restriction pattern 7
Sale unit price	→	Text entry restriction pattern 5
Cost unit price	→	Text entry restriction pattern 5



2.1.2.14 Product Template Settings

Template code → Text entry restriction pattern 1



2.1.2.15 Product Category Settings

Product category code → Text entry restriction pattern 1

Sort key → Text entry restriction pattern 5



2.1.2.16 Product Service Settings

Service code → Text entry restriction pattern 1

Unit price → Text entry restriction pattern 5

Quantity → Text entry restriction pattern 5

Cost unit price → Text entry restriction pattern 5



2.1.2.17 ViewCreator Data Reference Maintenance

Data reference CD → Text entry restriction pattern 1

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intra-mart WebPlatform/AppFramework Ver.7.1

Second Edition: August 31, 2009

Group Administrator Operation Guide

NTT DATA INTRAMART CORP.

3rd Floor, Akasaka Twin Tower Main Building, 2-17-22 Akasaka, Minato-ku, Tokyo 107-0052

TEL (03) 5549-2821 FAX (03) 5549-2816

E-mail: info@intra-mart.jp

Homepage: <http://www.intra-mart.jp/>

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