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JD Edwards EnterpriseOne Tools 8.97 Workflow Tools Guide

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JD Edwards EnterpriseOne Tools 8.97 Workflow Tools Guide
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Contents

About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

Note. Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

JD Edwards EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your JD Edwards EnterpriseOne applications most effectively.

Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading Documentation

In addition to the complete line of documentation that is delivered on your implementation guide CD-ROM, Oracle makes JD Edwards EnterpriseOne documentation available to you via Oracle's website. You can download PDF versions of JD Edwards EnterpriseOne documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps

Resource	Navigation
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
" " (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

Implementation guides contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne system.

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

Implementation guides provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

- USF (U.S. Federal)

- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments and suggestions are important to us. We encourage you to send us your feedback about our PeopleBooks and other reference and training materials. Please include the release numbers for the PeopleTools and applications that you are currently using. Email your comments to PSOFT-INFODEV_US@ORACLE.COM.

Common Fields Used in Implementation Guides

Address Book Number Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.

As If Currency Code Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

Batch Number Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

Batch Date Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

Batch Status Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to *E*.

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

JD Edwards EnterpriseOne Workflow Preface

This preface discusses Oracle's JD Edwards EnterpriseOne Workflow companion documentation.

JD Edwards EnterpriseOne Workflow Companion Documentation

Additional, essential information describing the setup and design of JD Edwards EnterpriseOne Tools resides in companion documentation. The companion documentation consists of important topics that apply to JD Edwards EnterpriseOne Workflow as well as other JD Edwards EnterpriseOne Tools. You should be familiar with the contents of these companion guides:

- Development Tools: Application Development
- Development Tools: Event Rules
- Object Management Workbench

In addition, this guide contains references to server configuration settings that JD Edwards EnterpriseOne stores in configuration files (such as jde.ini, jas.ini, jdbj.ini, jdelog.properties, and so on). Beginning with the JD Edwards EnterpriseOne Tools Release 8.97, it is highly recommended that you only access and manage these settings for the supported server types using the Server Manager program. See the Server Manager Guide on Customer Connection.

CHAPTER 1

Getting Started with JD Edwards EnterpriseOne Workflow

This chapter discusses:

- JD Edwards EnterpriseOne Workflow Overview
- JD Edwards EnterpriseOne Workflow Implementation

JD Edwards EnterpriseOne Workflow Overview

Oracle's JD Edwards EnterpriseOne Workflow enables you to automate the high-volume, formerly paper-based process into an email-based process flow across a network. Documents, information, and tasks pass from one participant to another for action based on a set of procedural rules. The result is an automated and efficient process with minimal user involvement, which enables you to streamline the existing business processes, increase efficiency, and reduce process time.

JD Edwards EnterpriseOne Workflow Implementation

This section provides an overview of the steps that are required to implement Oracle's JD Edwards EnterpriseOne Workflow.

In the planning phase of the implementation, take advantage of all JD Edwards sources of information, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About This Documentation* with information about where to find the most current version of each.

JD Edwards EnterpriseOne Workflow Implementation Steps

This table lists the steps for the JD Edwards EnterpriseOne Workflow implementation.

Step	Reference
1. Install EnterpriseOne	EnterpriseOne installation documentation for your platform.
2. Install one or more EnterpriseOne applications.	EnterpriseOne installation documentation for your applications.

CHAPTER 2

Understanding Workflow

This chapter discusses:

- Why Workflow is important.
- Workflow management: streamlining business.
- The benefits of Workflow.
- Workflow enhancement scenario.

Why Workflow is Important

In the past, companies benefited greatly from economies of scale, that is, the reduction of production costs that is achieved with increased output. These economies were possible because companies typically manufactured large quantities of standard products for relatively large and stable consumer groups. However, economies of scale are becoming less important in today's marketplace, due in large part to the increasing fragmentation of the consumer base. With so many products available, customers are more discriminating than ever and often expect highly complex services to go with the products that they purchase.

As a result, the definition of productivity as it relates to business success is changing rapidly and radically. Productivity is no longer defined simply as creating more with less. Increasingly, value is linked not only to sheer output but to innovation, or the ability to correctly anticipate and creatively respond to new and changing market opportunities. Today, a keen competitive advantage is enjoyed by those organizations with the flexible business infrastructures and tools in place to quickly develop new products and services and continuously outperform the time to market of their competitors.

The dependence of today's business enterprises on innovation and fast delivery of product cannot be overestimated. With the new emphasis on relentless innovation and the advantages that it breeds, successful companies are constantly searching for ways to reshape their corporate structures to streamline their business processes.

Workflow Management: Streamlining Business

Goods and services must be produced both faster and smarter through teamwork and efficiency. Only those companies with innovative staff, products, services, and short development cycles will prosper.

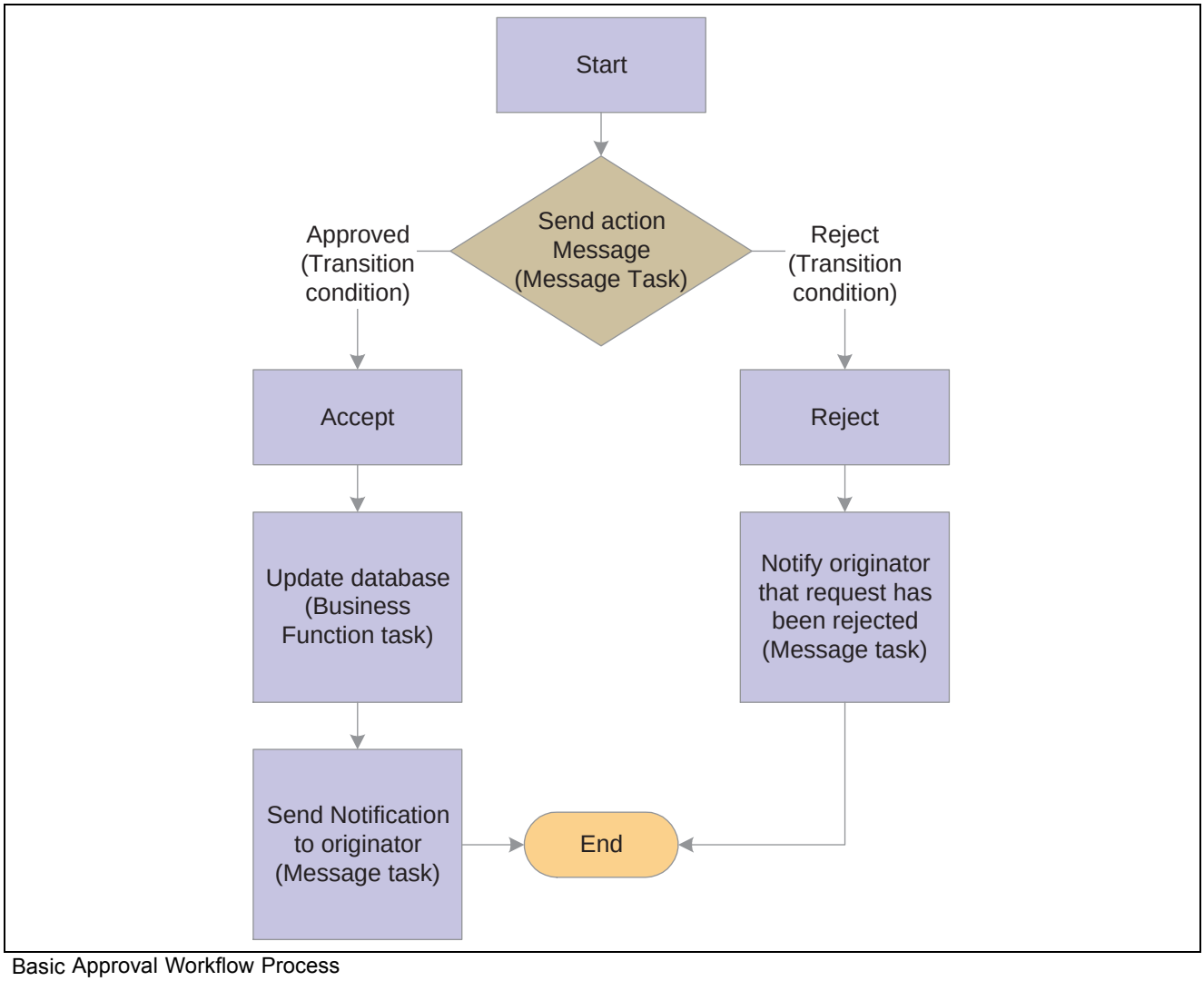
Workflow management, a strategy for automating business processes, is a powerful tool for translating the collaborative vision into real-world business applications with clear and measurable paybacks. The aim of Workflow management is to streamline the components of various office systems by eliminating unnecessary tasks (and the costs associated with the performance of those tasks) and automating the remaining tasks in a process.

Workflow management is the effective application of information technologies to internal business processes in order to accelerate the collaborative and creative processes that drive innovation. The goal of Workflow software technology is the creation of a single environment for managing the complexities multiple-office automation environments. As software has moved from individualized solutions with dedicated functionality to integrated groupware solutions, Workflow has evolved as a metaphor for the efficient coordination of multiple workgroups using multiple technologies.

Most Workflow products support two basic functions:

- Tools for mapping business processes, which might be defined sets of routes, roles, and rules for the movement of documents and tasks
- Implementation of those business processes through linkages with a company's computer network, shared databases, and email systems so that information can flow through the organization at a controlled and efficient pace

This flowchart illustrates a basic Workflow process for approving an increase to a customer's credit limit:



Basic Approval Workflow Process

The Benefits of Workflow

Because organizations are made up of a series of intricately intertwined business cycles, these cycles are a logical place to look first when attempting to streamline. According to the Workflow Management Coalition, almost 90 percent of all time that used to perform tasks within the business setting is classified as transfer time, whereas 10 percent is used for the actual performance of those tasks. The objective of Workflow analysis is to redefine and then reconstruct the components of lengthy business cycles so that the time required to execute a task is minimized and the transfer time between tasks is eliminated entirely.

Other key benefits of Workflow management include:

- Improved efficiency through the elimination of many unnecessary task steps
- Better business process control achieved by standardizing work methods and creating audit trails
- Improved customer service when consistency in the processes leads to greater predictability in levels of response to customers
- Flexibility bred from software control over processes, which enables their future redesign in response to changing business needs

Workflow Enhancement Scenario

This section discusses:

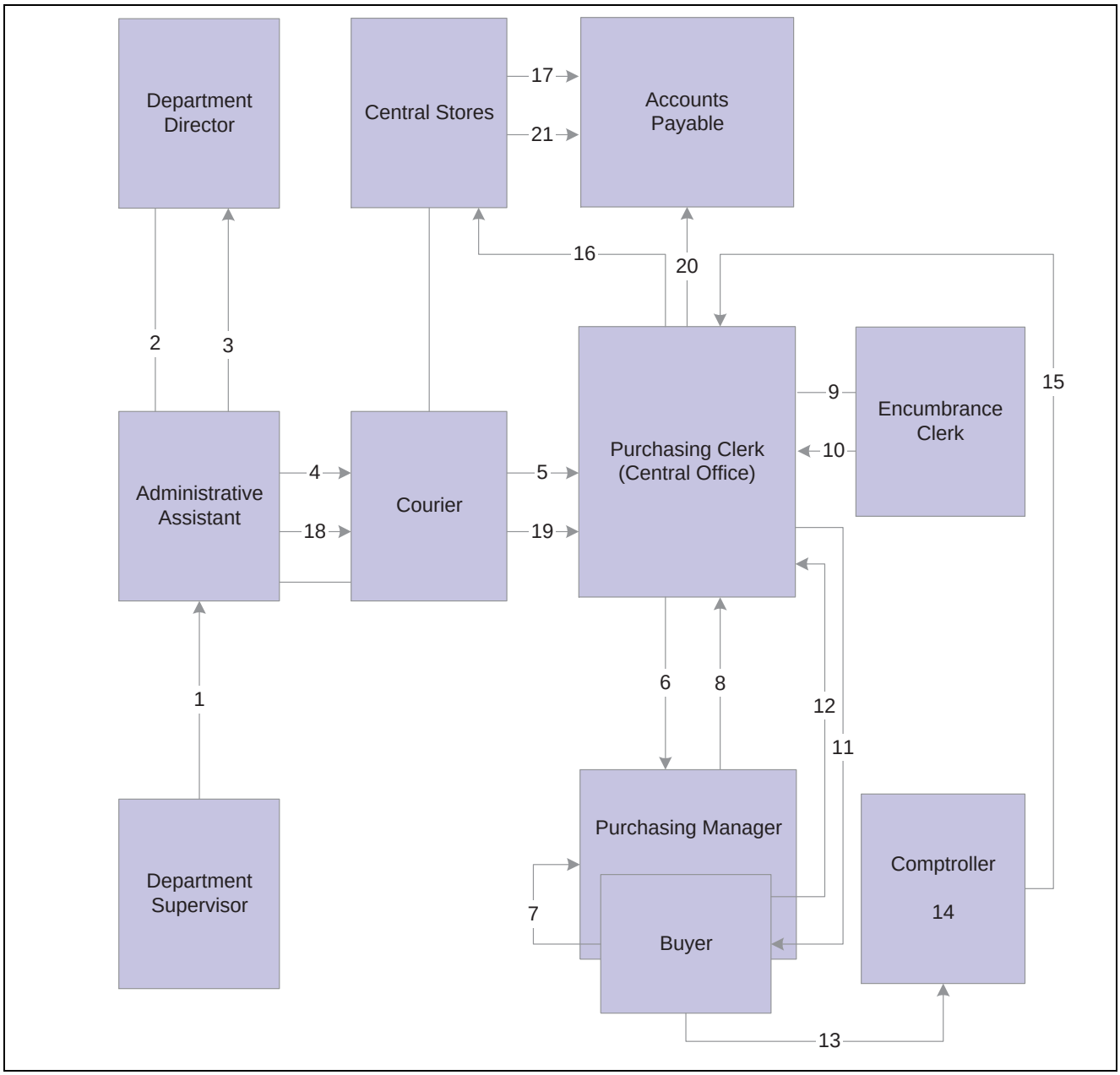
- Conventional Workflow.
- Enhanced Workflow with JD Edwards EnterpriseOne Workflow.

Conventional Workflow

Information that is critical to a Workflow process can be defined and stored in database tables, enabling a computer system to automate the flow of information and tasks. This automation minimizes the reliance on physical meetings to enter redundant data and to physically exchange paper. For example, using an automated Workflow process, purchase orders and work orders can be processed to completion without a single printout. The defined Workflow information might include order activity rules, Workflow steps, and expenditure authorization requests, all of which can be routed automatically using email.

The following scenario demonstrates the savings in labor and time that can be achieved when Workflow technology is applied to a typical business process like procurement.

This graphic shows the paper trail of a typical procurement process that is not automated. The step-by-step tasks of this conventional Workflow and the total time required to complete the procurement process are explained in the following graphic.



Typical Paper Trail Procurement Process

1. The department supervisor at a remote office fills out a requisition form to request goods.
2. The administrative assistant processes the requisition form, looks through two catalogs, and locates the items. The assistant then fills out the paper portion of the requisition and walks it to the department director.
3. The department director reviews the requisition, signs it, and puts it in an Out basket.
4. The administrative assistant retrieves the requisition and places it in a courier pack to the central office.
5. A courier drives to the remote office, picks up the courier pack, and delivers it to the purchasing clerk at the central office.
6. The purchasing clerk reviews the requisition, audits central stores, and sends the requisition to the purchasing manager if the item is in stock, or to the buyer if the item is not in stock.

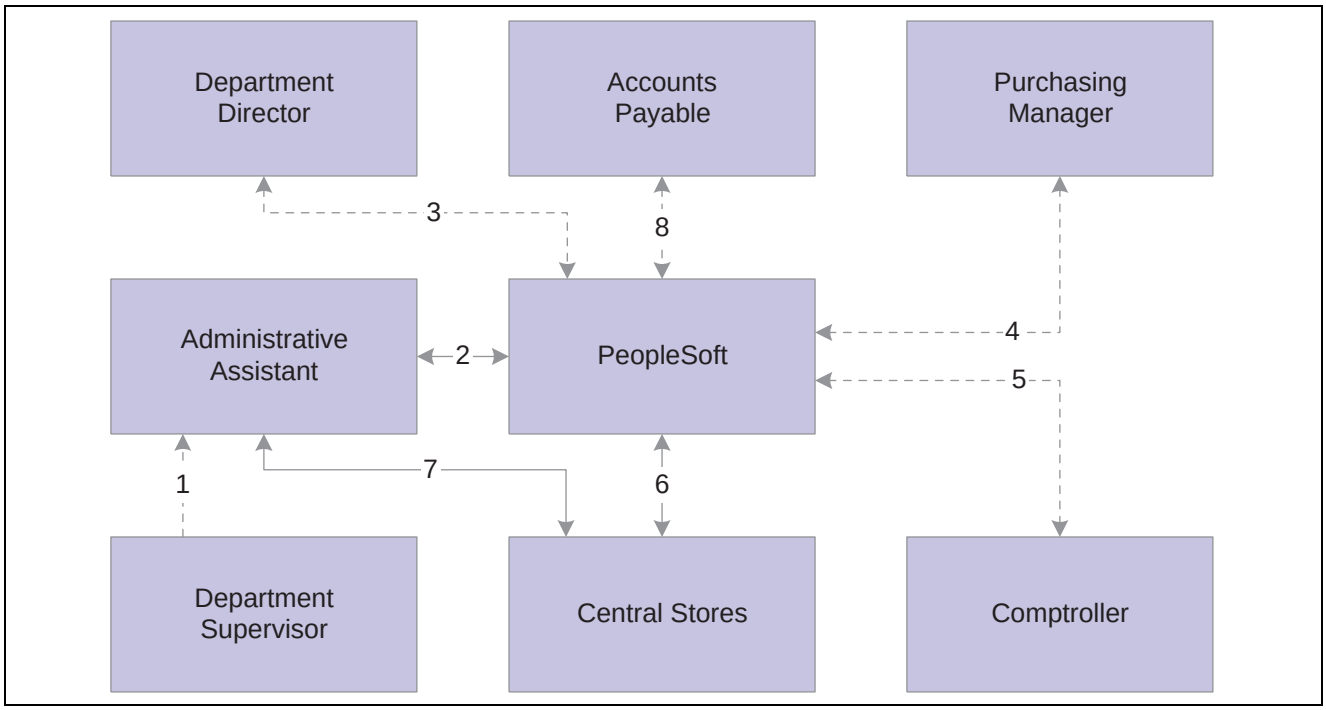
7. The buyer reviews the document, selects the supplier, calls for a quote, and passes the requisition to the purchasing manager.
8. The purchasing manager reviews, signs, and places the requisition in an Out basket.
9. The purchasing clerk retrieves the requisition and passes it to the encumbrance clerk.
10. The encumbrance clerk reviews the items, assigns account codes, and checks the budget. If funds are available, the requisition is passed back to the purchasing clerk.
11. The purchasing clerk sends the requisition to the comptroller if the item is in central stores, or to the buyer if it is not in stock and must be bought and delivered to central stores.
12. The clerk retrieves the purchase order and delivers it to the comptroller or buyer.
13. The buyer consolidates the requisition into a single purchase order per vendor and places the order in the out basket for delivery to the comptroller.
14. The comptroller reviews and signs the purchase order. At this step, the routing can take longer, based on the amount of the request and the level of authorization of the person approving the purchase.
15. The clerk retrieves the document and places it in interoffice mail. Another day passes.
16. A multipart document arrives one day later using interoffice mail in the purchasing department. The purchasing clerk tears out the white copy and sends the rest of the multipart form to central stores.
17. The purchasing clerk logs and files the white copy.
18. The central stores clerk retrieves the item from the shelf, tears out the pink copy, places it in the accounts payable stack, and ships the item and the remaining copies to the remote office.
19. The administrative assistant receives the item, tears out, logs, and files the blue copies, and places the green receiving and yellow accounts payable copy in a courier pack to go back to the central office.
20. A courier retrieves the pack and returns the green and yellow copies to the central office.
21. The purchasing clerk attaches the white original and green receiving copies to each other, puts them in the file, and sends the yellow copy to accounts payable.
22. The accounts payable clerk receives the invoice from central stores, retrieves the open yellow receiver copy from the file, and matches and enters the voucher.

Total time (in minutes) per item if the item is not in stock: 172.5

Total time (in minutes) per item if the item is in stock: 147.5

Enhanced Workflow with JD Edwards EnterpriseOne Workflow

This graphic shows how JD Edwards EnterpriseOne Workflow enhances this Workflow by reducing the paper trail, minimizing redundant data and data entry, and reducing errors or the need to redo work.



JD Edwards EnterpriseOne Workflow Enhancements

Using JD Edwards EnterpriseOne Workflow, the organization streamlined its Workflow process as described in the following steps:

1. The department supervisor fills out a requisition form to request goods.
2. The administrative assistant processes the requisition form online. The system checks the budget and automatically routes the request to the next approver based on the JD Edwards EnterpriseOne Workflow table hierarchy and the amount of the item.
3. The department director reviews and approves the requisition online. The system automatically routes the requisition to the appropriate buyer or purchasing manager.
4. The purchasing manager consolidates the requisition with others for the same vendor into a purchase order. The system automatically routes the purchase order to the next approver.
5. The comptroller reviews and approves the purchase order as required.
6. The purchase order is automatically routed to central stores. A clerk takes the pick slip, retrieves the item from the shelf, and ships it for next-day delivery.
7. The administrative assistant receives the item on the next day.
8. The accounts payable clerk receives the invoice online and matches it to the open receipt that is also online. The system automatically creates a voucher.

Total time (in minutes): 27

CHAPTER 3

Understanding JD Edwards EnterpriseOne Workflow

This chapter discusses:

- JD Edwards EnterpriseOne Workflow.
- Key concepts.
- JD Edwards EnterpriseOne Workflow features.
- Components of a JD Edwards EnterpriseOne Workflow process.
- An example of a JD Edwards EnterpriseOne Workflow process.
- How to plan for a JD Edwards EnterpriseOne Workflow.

JD Edwards EnterpriseOne Workflow

Using JD Edwards EnterpriseOne Workflow, you can enable any application for JD Edwards EnterpriseOne Workflow. This flexibility and ease of use enables you to use new, innovative business process ideas in the existing system without major system changes.

JD Edwards EnterpriseOne Workflow enables you and your employees to access JD Edwards EnterpriseOne Workflow messages or tasks from several places:

- Work Center.
- Employee Queue Manager.
- Third-party email systems.
- Work Item Manager (web client users only).

You can monitor the JD Edwards EnterpriseOne Workflow processes and tasks in these ways:

- As a JD Edwards EnterpriseOne Workflow administrator, from the Process Task Monitor.

  This monitor enables an administrator to override authority at the execution of certain tasks or to monitor the JD Edwards EnterpriseOne Workflow for potential delays in JD Edwards EnterpriseOne Workflow queues.

- Graphically, from the Process Modeler Server (sold separately).

  This product provides an HTML view of JD Edwards EnterpriseOne Workflow process instances within the JD Edwards Portal and provides JD Edwards EnterpriseOne Workflow administrators the ability to suspend, terminate, or resume any JD Edwards EnterpriseOne Workflow process instance.

- As a user, from the Work Center, which displays action or error messages that require user interaction.

For example, when a user receives notification that a document requires her review, the routing and the document appear within the Work Center.

The JD Edwards EnterpriseOne Workflow model is based on the following principles:

Routes	Routes define the path along which the JD Edwards EnterpriseOne Workflow engine moves work. This work could involve a message, batch process, business function, halt in the system, or form. Routing can be simple, meaning that it is typically sequential; or it can be complex, meaning that it involves joins or splits, parallel routing, or iterative routing (looping).
Rules	Rules define to whom or where the work should be routed. Rules define the conditions that must be met for the JD Edwards EnterpriseOne Workflow engine to progress from one step to the next. Rules can be contingent on predefined threshold values or can be as simple as moving to the next step in a process.

Key Concepts

The following table contains definitions of key concepts that are essential in understanding the JD Edwards EnterpriseOne Workflow. Before you create a JD Edwards EnterpriseOne Workflow process, you should familiarize yourself with the following concepts:

JD Edwards EnterpriseOne Workflow system All of the tools that facilitate the design of a JD Edwards EnterpriseOne Workflow process, as well as the JD Edwards EnterpriseOne Workflow engine.

JD Edwards EnterpriseOne Workflow engine All of the JD Edwards EnterpriseOne mechanisms that move the JD Edwards EnterpriseOne Workflow process from one task to another.

Process definition A template or model of the JD Edwards EnterpriseOne Workflow process. The process definition contains all the information about the tasks, transitions, and conditions that make up a JD Edwards EnterpriseOne Workflow process. That is, the process definition defines each component of the process and defines each path that the process might follow.

Process instance An active process in the system. When an event rule activates a JD Edwards EnterpriseOne Workflow process, the system creates a process instance. The process instance follows a path that is defined in the process definition. You can have several concurrent process instances of the same process in the system.

Note. If you are familiar with object-oriented programming, a process definition is comparable to a class and the process instance is comparable to an object.

Process version A specific JD Edwards EnterpriseOne Workflow process definition. The system uses process versions to enable modification of processes without disrupting currently running process instances. Before you modify a process, you should copy the JD Edwards EnterpriseOne Workflow process version to a new version number, edit the new version, and then make the new version active. Use this versioning mechanism during JD Edwards EnterpriseOne

Workflow development to enable process instances that started using the old version to finish using that same version.

JD Edwards EnterpriseOne Workflow Features

JD Edwards EnterpriseOne Workflow enable you to:

- Attach a JD Edwards EnterpriseOne Workflow process with event rules to any event within an application, batch process, or named event rule (NER).

  You can also attach a JD Edwards EnterpriseOne Workflow process through table event rules in Table Design Aid.
- Run conditional processing, which is logic that is contingent upon supplied criteria, such as quantity and dollar amount.

  This criteria can be any parameter that is used in the decision-making process that the system can evaluate.
- Create messages that are specific to the process by setting up message templates (text substitution messages) in the data dictionary.

JD Edwards EnterpriseOne Workflow also:

- Integrates seamlessly with JD Edwards EnterpriseOne interactive and batch applications.
- Offers multiple level approvals.
- Offers automatic escalation of messages which have not been acted upon.
- Offers manual escalation of processes in which the administrator can override or bypass certain tasks or users in the JD Edwards EnterpriseOne Workflow process.
- Automatically time stamps all tasks within a process for auditing and improvement analysis through the Process Task Monitor (P98860) or JD Edwards EnterpriseOne Workflow Advanced Analysis (P98870).

JD Edwards EnterpriseOne Workflow technology, rules, and principles enable you to work more efficiently and reduce cycle time. The automated process reduces errors and generates less paperwork. Furthermore, JD Edwards EnterpriseOne Workflow helps you develop JD Edwards EnterpriseOne Workflow-enabled applications or quickly and smoothly enable existing applications for JD Edwards EnterpriseOne Workflow. You can attach a JD Edwards EnterpriseOne Workflow process that sends a message or calls an application to any event within an application. All you have to do is attach a Start Process call to an event within an application to initiate the JD Edwards EnterpriseOne Workflow process. Because this process is defined outside of the application, it offers you unlimited flexibility to incorporate innovative ideas into the JD Edwards EnterpriseOne system.

Components of a JD Edwards EnterpriseOne Workflow Process

This section provides an overview of the components of a JD Edwards EnterpriseOne Workflow process, and describes the JD Edwards EnterpriseOne Workflow tasks.

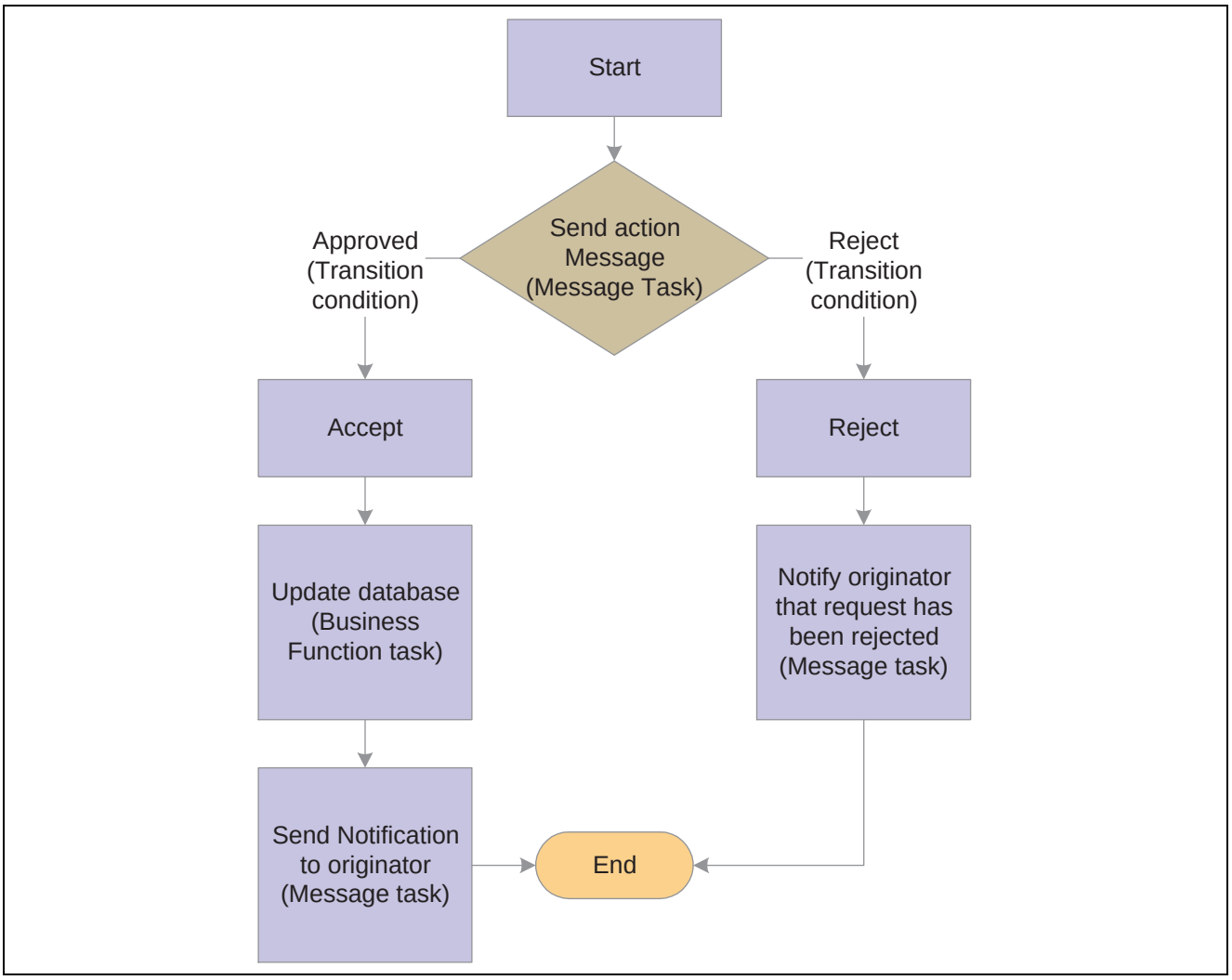
Components

A JD Edwards EnterpriseOne Workflow process consists of tasks and transitions. A task represents an action that takes place in the JD Edwards EnterpriseOne Workflow process, such as starting a JD Edwards EnterpriseOne Workflow process, sending an approval message, or updating a table in a database. A transition links JD Edwards EnterpriseOne Workflow tasks together. Transitions can contain transition conditions, which are logical criteria that determine which task will occur next in the JD Edwards EnterpriseOne Workflow process.

The following graphic illustrates a JD Edwards EnterpriseOne Workflow process. Each button represents a task in the process. The Start task begins the process when triggered by an event within an application, such as someone changing a customer's credit limit. Based on that change, the system invokes a message task, which sends a message to a designated user (an approver) to review the change and either approve or reject it.

The lines in the graphic that are labeled Approved and Rejected illustrate transition conditions. If the approver approves the change, a business function updates the database with new information (such as the customer's new credit limit). The system then sends a message back to the originator, acknowledging that the changes were made. If the approver rejects the change, the system sends a message to the originator informing him or her that the request was rejected. The database remains unchanged if the request is rejected.

This flowchart shows a JD Edwards EnterpriseOne Workflow process.



JD Edwards EnterpriseOne Workflow Process

JD Edwards EnterpriseOne Workflow Tasks

The following tasks can be used in a JD Edwards EnterpriseOne Workflow process:

Start — A task that begins a JD Edwards EnterpriseOne Workflow process when triggered by an event. This task is automatically included in the process when you create a JD Edwards EnterpriseOne Workflow process.

End — A task that completes a JD Edwards EnterpriseOne Workflow process. As with Start, this task is automatically included in the process when you create a JD Edwards EnterpriseOne Workflow process.

Batch application — A task that starts a JD Edwards EnterpriseOne batch application.

Business function — A task that uses a business function for special logic processing, including any business functions that are written in C programming language or named event rules. For example, you can set up a business function task that updates the database if a user approves an active message.

Local subprocess A task that starts another JD Edwards EnterpriseOne Workflow process, which includes its own set of tasks.

Information Task A task that sends notifications only. You can attach shortcuts, but recipients will not be able to respond to them. An Information task can include these items:

- A recipient specifying to whom the message will be sent. You can also include a CC and BCC email address.
- A shortcut to the Generic JD Edwards EnterpriseOne Workflow Approval forms (P98805) or any other form.
- A message template containing boilerplate text and values that are substituted from data items within key data and additional data structures of the JD Edwards EnterpriseOne Workflow process.
- A media object and a media object key. JD Edwards EnterpriseOne software media objects and imaging features enable you to attach useful information to an application, including information that might currently exist as a paper-based document. The media objects feature enables you to attach the information to JD Edwards EnterpriseOne software applications, forms and rows, and Object Librarian objects. The imaging feature within media objects gives you the flexibility to create an efficient method of information storage.

  The media object key uniquely defines a record in the generic text database.
-

Action Task A task that sends a message that will require a response from the recipient(s) via a web shortcut. An Action task can include these items:

- A recipient specifying to whom the message will be sent. You can also include a CC and BCC email address.
- A shortcut to the Generic JD Edwards EnterpriseOne Workflow Approval forms (P98805) or any other form.
- A message template containing boilerplate text and values that are substituted from data items within key data and additional data structures of the JD Edwards EnterpriseOne Workflow process.
- A media object and a media object key. JD Edwards EnterpriseOne software media objects and imaging features enable you to attach useful information to an application, including information that might currently exist as a paper-based document. The media objects feature enables you to attach the information to JD Edwards EnterpriseOne software applications, forms and rows, and Object Librarian objects. The imaging feature within media objects gives you the flexibility to create an efficient method of information storage.
- Escalation options enabling the system to forward (escalate) unread messages after a certain period of time to another user. You add escalation to a message so that if the original recipient of the message is not available to respond to the message, another person will receive the message.

Halt A task that suspends the JD Edwards EnterpriseOne Workflow process for a certain period. When a period of time has passed or when an event occurs, the process starts again. The process is permanently halted until some outside

event restarts it. You specify the earliest date and time that the task can be restarted within the instance record.

Example: A JD Edwards EnterpriseOne Workflow Process

The Accounts Receivable application can detect when a user changes a customer's credit limit. This ability to detect a change enables an approval process to automatically route a message to the appropriate people for their approval or rejection.

In the following example, a user changes a customer's credit limit from 50,000 USD to 60,000 USD. The system displays a message box that notifies the user that the changes have been submitted for approval. The system does not reflect the new credit limit in the customer record until the change is approved.

This example shows the dialog box that explains that the changes are pending review.

The approver receives a message in the Credit Management Queue through the Employee Work Center. The message indicates that the change is pending approval.

To approve or reject the change, the approver clicks the Customer Credit Limit Was Changed message and clicks the JD Edwards EnterpriseOne Workflow Approval button, which opens a form used to approve or reject the message. This form also enables the approver to add supplemental information about the approval or rejection action for audit purposes.

If the approver rejects the change, the system retains the customer's old credit limit information and sends a message to the originator, informing her or him of the rejection, which completes the JD Edwards EnterpriseOne Workflow process.

If the approver approves the change, a business function task initiates a named event rule (NER) that updates the database with the customer's new credit limit.

This example shows the JD Edwards EnterpriseOne Workflow Approval form.

The process sends a message to the user who originated the credit limit change, indicating that the credit limit change was approved.

Planning for JD Edwards EnterpriseOne Workflow

The JD Edwards EnterpriseOne Workflow system enables a well-managed business to operate even more efficiently. The JD Edwards EnterpriseOne Workflow system is essentially value-neutral, meaning that it does not substantially improve the efficiency of processes that are poorly designed originally. Therefore, before thinking about ways to better manage the internal JD Edwards EnterpriseOne Workflows, your company should first consider some degree of business process reengineering. This planning process is vital for ensuring that the current business processes and management approaches are synchronized with today's volatile, competitive environment, and not a hindrance to flexibility and growth.

CHAPTER 4

Setting Up JD Edwards EnterpriseOne Workflow

This chapter provides an overview of how to set up a JD Edwards EnterpriseOne Workflow and discusses how to set up JD Edwards EnterpriseOne Workflow components.

Understanding How to Set Up JD Edwards EnterpriseOne Workflow

When you create a JD Edwards EnterpriseOne Workflow process to send messages to individuals or to members of a distribution list, you can perform some initial tasks to make sure that the system is set up to properly distribute these messages. For example, if the recipients of a JD Edwards EnterpriseOne Workflow message use a third-party email system, you will need to set up JD Edwards EnterpriseOne with external mail access. For users of the JD Edwards EnterpriseOne mail system, the Work Center, you might want to set up custom queues to organize and categorize messages sent by different JD Edwards EnterpriseOne Workflow processes.

You might also need to set up a message template for your JD Edwards EnterpriseOne Workflow process. A JD Edwards EnterpriseOne Workflow process uses message templates to present messages that contain specific information or information that is substituted from data items within the process.

You can perform these tasks before you begin creating a JD Edwards EnterpriseOne Workflow process:

- Setting Up External Mail Access
- Setting Up Queues
- Setting Up Message Templates

Setting Up JD Edwards EnterpriseOne Workflow Components

This section provides an overview of external mail access and discusses how to:

- Enable sending external mail using SMTP
- Set up queues
- Set up message templates

See Also

Chapter 9, “Understanding Message and JD Edwards EnterpriseOne Workflow System Functions,” page 77

Setting Up External Mail Access

JD Edwards EnterpriseOne software provides an integrated mail system that enables users to communicate with external email software packages such as Microsoft Outlook or Lotus Notes. The system uses the Simple Mail Transfer Protocol (SMTP) to do this.

SMTP is a TCP/IP protocol for sending messages from one computer to another on a network. SMTP is used on the internet to route messages. In JD Edwards EnterpriseOne, the Send Message Extended system function uses SMTP to route messages to external email addresses.

Enabling an SMTP Server

These are the benefits of using an SMTP server:

- You can separate mail functions along client/server lines, which facilitates the creation of front-end client mail software that is independent of the back-end mail engine. An SMTP server is not dependent on what kind of external mail software is being used in your company.
- You can send messages to anyone with an external mail address by using the Send Message Extended system function. You must pass a valid email address in the recipient field.

To enable sending external mail using SMTP add these lines to the [JDEMAIL] section in the jde.ini file of each Windows client:

- Rule1=90|OPT|MAILSERVER=*smtp_server_name*

  The MAILSERVER setting identifies the name of the SMTP server responsible for sending messages. This setting must be equal to the name of the machine on which the SMTP service is running. This server name is the same as it is listed in the TCP/IP host file on the server.

- Rule2=100|DEFAULT|OWMON=*address@your_company.com*

  When the Send Message system function is initiated from the Server Administration Workbench, the OWMON parameter is used to determine the From address for the mail message. Set this parameter to an appropriate mail address for your company.

- Rule3=110|DEFAULT|JDE_SYSTEM=*address@your_company.com*

  When the Send Message system function is initiated within application or business function event rules, the JDE_SYSTEM parameter is used to determine the From address for the mail message. Set this parameter to an appropriate mail address for your company.

- Rule4=120|DEFAULT|JD Edwards EnterpriseOne Workflow_SYSTEM=*address@your_company.com*

  When the Send Message system function is initiated from an activity in a JD Edwards EnterpriseOne Workflow process, the JD Edwards EnterpriseOne Workflow_SYSTEM parameter is used to determine the From address for the mail message. Set this parameter to an appropriate mail address as the originator of a JD Edwards EnterpriseOne Workflow message for your company.

- Rule5=130|OPT|MERGELOCAL=1

  For current installations, the MERGELOCAL parameter setting should be equal to 1.

- Rule6=140|OPT|UPDATELOCAL=0

  For current installations, the UPDATELOCAL parameter setting should be equal to 0.

Setting Up Queues

Queues categorize messages within the system and organize them in the Work Center. For example, messages can be categorized into queues for priority mail or submitted jobs. Through a queue, users can approve or reject certain activities in the process flow. You set up a queue in the same way as you set up any user-defined code (UDC).

JD Edwards EnterpriseOne Workflow includes several predefined queues, but you might want to set up a custom queue for messages generated by JD Edwards EnterpriseOne Workflow processes that you create. For example, you might want to set up a queue for messages generated by a credit limit approval process. This queue could gather any approval or rejection messages related to credit limits for customers. A user can then open that queue and act on the message contained within it.

Access User Defined Codes.

To set up a queue:

From JD Edwards EnterpriseOne Workflow Management Setup (G0241), select JD Edwards EnterpriseOne Workflow User Defined Codes (G02411), and then select Employee Task Queues (P0004A).

1. On Work With User Defined Codes, click Add.
2. On User Defined Codes, complete these fields in an empty row in the detail area and click OK:
   - Codes

     Enter a unique number for the queue.
   - Description 1
   - Description 2
   - Special Handling

- Hard Coded

  Enter N in this field.

Codes	A list of valid codes for a specific UDC list.
Description 1	A user-defined name or remark.
Description 2	Additional text that further describes or clarifies a field in the system.
Special Handling	A code that indicates special processing requirements for certain UDC values. The value that you enter in this field is unique for each UDC type. The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify whether the language is double-byte or does not have uppercase characters. Programming is required to activate this field.
Hard Coded	A code that indicates whether a UDC is hard-coded. Valid values are: Y The UDC is hard-coded N The UDC is not hard-coded A check mark indicates that the UDC is hard-coded.

Setting Up Message Templates

When you add an Information or Action task (a task that sends messages to individuals or to members of a distribution list), you can choose to use a message template. Message templates enable you to send boilerplate text along with information that is substituted from data items used within the process.

You can create a new message template before you begin creating a JD Edwards EnterpriseOne Workflow process or set up the template during creation of an Information or Action task.

Use this naming convention when creating message templates:

- LM*xxxxyyy*
- where LM identifies the message as a JD Edwards EnterpriseOne Workflow message
- *xxxx* = the system code (use system codes 55 through 59 for customer-specific messages)
- *yyy* = a sequential number

Access Object Management Workbench (OMW).

1. In OMW, highlight the project to which you want to add the message template, and the click Add.
2. On Add EnterpriseOne Object to the Project, select Data Item in the Control Table Objects area, and then click OK.
3. On the Data Dictionary Item Type dialog box, click Yes to add a glossary data item.
4. On Glossary Items, click the Item Specifications tab, and then complete these fields:

- Glossary Group

  Enter Y to identify the message as a JD Edwards EnterpriseOne Workflow message. The system disables the Data Structure Template tab. This tab is used for creating error messages, not JD Edwards EnterpriseOne Workflow messages.

- Product Code
- Product Code Report

  Enter a UDC that specifies the system number for reporting and jargon.

- Description
- Error Level

  If this is an informative message, such as a message notifying a recipient that an employee's salary has been increased, enter.

5. Click the Item Glossary tab and enter the text for the message.

   If the message contains values that will be substituted by data items from the key data and additional data, leave a placeholder for them by using an ampersand (&) and the number of the value.

6. Click OK when you have finished setting up the message template.

Glossary Group

For JD Edwards EnterpriseOne, a code that indicates the type of data item. It is validated against UDC table H98/DI. Items in glossary group D or S can be included in database tables. Items in other glossary groups (for example, error messages) cannot be added to a table.

For World, a UDC (98/GG) that specifies the type of data used to select data dictionary terms for printing.

The data item names for error messages are assigned automatically. If you need to assign error message numbers, use 4 digit numbers greater than 5000.

The data item name for a non-database field (used on a video or report but not in a file - glossary group U) must begin with a #, $ or @. For help text (glossary group H), the data dictionary Inquiry/Revision Program field may be used to specify the name of a follow-on item. To create messages for the IBM message file (glossary group J), begin the data item name with three characters (for example, CLT0001).

Product Code

A UDC (98/SY) that identifies a system. Valid values include:

01

Address Book

03B

Accounts Receivable

04

Accounts Payable

09

General Accounting

11

Multicurrency

Product Code Reporting	A UDC (98/SY) that specifies the system number for reporting and jargon purposes.
Error Level	This field indicates the severity of the error message and to denote warning messages.

CHAPTER 5

Creating a JD Edwards EnterpriseOne Workflow Process

This chapter provides an overview of a JD Edwards EnterpriseOne Workflow process and describes how to:

- Create key and additional data structures.
- Create a JD Edwards EnterpriseOne Workflow process in OMW.
- Design a JD Edwards EnterpriseOne Workflow process in JD Edwards EnterpriseOne Workflow Modeler.
- Add tasks to a JD Edwards EnterpriseOne Workflow process
- Work with Transitions and Transition Conditions
- Work with Batch Application Tasks
- Use Business Function Tasks
- Use Local Subprocess Tasks
- Use Halt Tasks
- Use Information and Action Tasks
- Work with distribution lists
- Set up distribution lists
- Work with recipient conditions

Understanding How to Create a JD Edwards EnterpriseOne Workflow Process

A JD Edwards EnterpriseOne Workflow process is an object in the JD Edwards EnterpriseOne system. You create and manage a JD Edwards EnterpriseOne Workflow process in Object Management Workbench (OMW) like any other object. When you create a JD Edwards EnterpriseOne Workflow process, the system automatically adds it to your Default Project folder in OMW.

The following steps outline the high-level processes for creating a JD Edwards EnterpriseOne Workflow process:

1. Create key and additional data structures for the JD Edwards EnterpriseOne Workflow process.
2. Create the JD Edwards EnterpriseOne Workflow process by naming it and assigning the appropriate data structures to it.
3. Use JD Edwards EnterpriseOne Workflow Modeler, a graphical design tool that you launch from OMW, to add and configure each component of the JD Edwards EnterpriseOne Workflow process.

4. Attach the JD Edwards EnterpriseOne Workflow process to the application from which you want the JD Edwards EnterpriseOne Workflow process to start.

Some of the steps of the process can consist of several additional tasks. For example, when you add an Information or Action task to a JD Edwards EnterpriseOne Workflow process in JD Edwards EnterpriseOne Workflow Modeler, you might have to create distribution lists, add event rules, and create a message template.

See Also

Chapter 3, "Understanding JD Edwards EnterpriseOne Workflow," Components of a JD Edwards EnterpriseOne Workflow Process, page 11

JD Edwards EnterpriseOne Tools 8.97 Object Management Workbench Guide, "Working with Objects"

Prerequisite

Before you begin creating JD Edwards EnterpriseOne Workflow processes:

- See the JD Edwards EnterpriseOne Workflow Modeler Installation Guide for JD Edwards EnterpriseOne Workflow Modeler installation instructions. You must install JD Edwards EnterpriseOne Workflow Modeler before you can create and design a JD Edwards EnterpriseOne Workflow process.
- Understand the concepts of JD Edwards EnterpriseOne development tools. See JD Edwards EnterpriseOne Tools and other topics in the Development Tools Guide for more information.
- Define users and distribution lists in Address Book before setting up your JD Edwards EnterpriseOne Workflow processes. See Address Book Maintenance in the Address Book Guide for information about entering address book profiles for new users.
- If you are going to integrate with a third-party email system, see Setting Up External Mail Access in the JD Edwards EnterpriseOne Workflow Guide.

Creating Key and Additional Data Structures

This section provides an overview about creating key and additional data structures and describes how to create a data structure for key and additional data.

Understanding Key and Additional Data Structures

A JD Edwards EnterpriseOne Workflow process requires these two data structures:

- Key
- Additional

A key data structure contains the data items that make an instance of a process unique, similar to how the primary key in a table is the unique index in a table. Key data is the basis of the JD Edwards EnterpriseOne Workflow process. You can use multiple data items in the key data structure.

An additional data structure contains all of the other data that the process, and any task within the process, needs to complete the process flow. JD Edwards EnterpriseOne Workflow can use the additional data structure to pass information to tasks within the process and to users. The system also uses additional data to track audit information. The parameters of the key and additional data structures are stored in the Process Instance table (F98860).

Another distinction between the two data structures is that the values in the key data structure do not change during the life of a process instance. The values in the additional data structure can change as the instance is executed.

Note. Do not include the same data items in both the key and additional data structures.

If key and additional data structures do not exist for the new JD Edwards EnterpriseOne Workflow process, you can define new ones. You also can use existing key and additional data structures when you create a new JD Edwards EnterpriseOne Workflow process, but this action is not recommended because of the interdependencies it will create.

Naming Conventions for Key and Additional Data Structures

Names of key and additional data structures begin with WF and use this format:

- *WFxxxxyyyA* or *WFxxxxyyyB*
- Where
- *WF* indicates a key data or additional data selection
- *xxxx* specifies the system code
- Use codes 55 through 59 for customer-specific keys and additional data structures.
- *yyy* represents a sequential number
- *A* identifies key data
- *B* identifies additional data

Creating a Data Structure for Key Data or Additional Data

Access OMW.

1. On the Object Management Workbench form, click the project to which you want to add the data structure.

   Note. You should add the data structures to the same project in which you are creating a JD Edwards EnterpriseOne Workflow process. See Adding Objects to Projects in the Object Management Workbench Guide for more information.

   ---

2. Click Add.
3. On Add EnterpriseOne Object to the Project, click the Data Structure option under the Object Librarian Objects heading, and then click OK.
4. On Add Object, complete these fields:
   - Object Name

     Use the data structure naming conventions to name the data structure.

- Description
- Product Code
- Product System Code
- Object Use

5. Click the Regular Data Structure option and then click OK.

   The system displays the Data Structure Design form.

6. On Data Structure Design, click the Design Tools tab and then click Data Structure Design.
7. On Data Structure, select the data dictionary items you want to include in the key data or additional data, and drag them to Structure Members on the left.

   You can rename structure member items by clicking the data item and typing a new name.

8. When you are finished choosing data items, click OK.

   The data structure appears under your project in OMW.

Note. After you create the key data and additional data structures, you can attach them to the JD Edwards EnterpriseOne Workflow process. See To create a JD Edwards EnterpriseOne Workflow process in the JD Edwards EnterpriseOne Workflow Guide.

Creating a JD Edwards EnterpriseOne Workflow Process in OMW

This section provides an overview of naming JD Edwards EnterpriseOne Workflow processes and describes how to create a JD Edwards EnterpriseOne Workflow process in OMW.

Understanding How to Create a JD Edwards EnterpriseOne Workflow Process in OMW

Before you can design a JD Edwards EnterpriseOne Workflow process in JD Edwards EnterpriseOne Workflow Modeler, you must create and add the JD Edwards EnterpriseOne Workflow process as an object in OMW.

Naming Conventions for JD Edwards EnterpriseOne Workflow Processes

When you create a JD Edwards EnterpriseOne Workflow process, you must name it. The name can be as many as 10 characters and should be in this format:

- *Kxxxxyyyyy*
- Where:
- *K* designates a JD Edwards EnterpriseOne Workflow process
- *xxxx* specifies a system code
- This value is typically two digits, but can be as many as four digits. Use codes 55 through 59 for customer-specific processes.
- *yyyyy* represents a sequential number
- This value is typically two digits, but can be as many as five digits.

You also must provide a description about the purpose of the JD Edwards EnterpriseOne Workflow process. This description can be as many as 40 characters.

Creating a JD Edwards EnterpriseOne Workflow Process in OMW

Access OMW.

1. On Object Management Workbench, select the project in which you want to create a JD Edwards EnterpriseOne Workflow process and click Add.
2. On Add EnterpriseOne Object to the Project, click JD Edwards EnterpriseOne Workflow Process under the JD Edwards EnterpriseOne Workflow heading and then click OK.
3. On Add Non-OL Object, complete the Process field.
   - Process

     Name the JD Edwards EnterpriseOne Workflow process using the format *Kxxxxyyyyy*, where:

     K designates a JD Edwards EnterpriseOne Workflow process

     xxxx specifies a system code

     This value can be as many as four digits. Use codes 55 through 59 for customer-specific processes.

     yyyyy = represents a sequential number
   - Version
   - Description

     Provide a description that indicates the purpose of the JD Edwards EnterpriseOne Workflow process. This description can be as many as 40 characters.
   - Product Code
4. Select a data structure for the key data by clicking the Search button in the Key Data Structure field.

   Note. If you want to create a diagram of the JD Edwards EnterpriseOne Workflow process in JD Edwards EnterpriseOne Workflow Modeler before you create these data structures, use existing data structures and then replace them with your own when you are ready to configure each component of the JD Edwards EnterpriseOne Workflow process.

   See Chapter 5, "Creating a JD Edwards EnterpriseOne Workflow Process," Creating Key and Additional Data Structures, page 24.
5. On Data Structure Search and Select, type the name of the data structure in the Object Name field and then click Find.
6. Select the data structure that you want to use for the key data and click Select.
7. On Add Non-OL Object, click the Search button in the Additional Data Structure field to select a data structure for the additional data
8. On Data Structure Search and Select, type the name of the data structure in the Object Name field and then click Find.
9. Select the data structure that you want to use for the additional data and click Select.
10. If you want the JD Edwards EnterpriseOne Workflow engine to keep audit records of all instances of the JD Edwards EnterpriseOne Workflow process, click the History Tracking option.

Note. It is recommended that you select the History Tracking option. When a JD Edwards EnterpriseOne Workflow process is started, audit records are saved in the instance tables (F98860 and F98865) and can be used for historical analysis. If you do not select this option, the audit records are deleted after the JD Edwards EnterpriseOne Workflow process completes

Periodically, you can purge audit records that you no longer need using the Purge Completed JD Edwards EnterpriseOne Workflow Processes (R98860P) batch application.

11. Click OK.
12. On JD Edwards EnterpriseOne Workflow Design, click OK to save the JD Edwards EnterpriseOne Workflow process in OMW.

    After you create the JD Edwards EnterpriseOne Workflow process in OMW you need to design and configure each component of the JD Edwards EnterpriseOne Workflow process.

    See Chapter 5, "Creating a JD Edwards EnterpriseOne Workflow Process," Designing a JD Edwards EnterpriseOne Workflow Process in JD Edwards EnterpriseOne Workflow Modeler, page 29.

Description	Glossary
Process	The unique identifier for a process. If no value is entered, a next number is assigned. Once assigned, the value cannot be changed.
Version	A number from 1 to 99999 that identifies a unique version of a JD Edwards EnterpriseOne Workflow process.
Description	The description of the JD Edwards EnterpriseOne Workflow process.
Product Code	A user-defined code (UDC) (98/SY) that specifies the system number for reporting and jargon purposes.
Key Data Structure	A data structure, comprised of one or more data items, that serves as the key data for the JD Edwards EnterpriseOne Workflow process. A process can be keyed by the data items from a JD Edwards EnterpriseOne Workflow task. For example, the primary data structure of a credit limit revisions process would be the address book number of the customer whose credit limit was changed. To identify this key data to the system, you must create a data structure that contains these items and attach it to the process as the primary data structure.
Additional Data Structure	Tasks within a JD Edwards EnterpriseOne Workflow process often evaluate or use data that is passed from other tasks. To pass data between tasks, you must create a data structure that contains the data items that you want to be evaluated, and then attach that data structure to the process. For example, consider a task within the credit limit revisions process. As the process runs, the task uses the old and new credit limit values to determine to whom to send the approval messages.
History Tracking	The next available unique instance for the process.

Designing a JD Edwards EnterpriseOne Workflow Process in JD Edwards EnterpriseOne Workflow Modeler

This section provides overviews of designing a JD Edwards EnterpriseOne Workflow process and using JD Edwards EnterpriseOne Workflow modeler toolbar and describes how to open a new JD Edwards EnterpriseOne Workflow process in JD Edwards EnterpriseOne Workflow Modeler.

Understanding How to Design a JD Edwards EnterpriseOne Workflow Process in JD Edwards EnterpriseOne Workflow Modeler

JD Edwards EnterpriseOne Workflow Modeler is a graphical design tool that you can use to design and configure each component of a JD Edwards EnterpriseOne Workflow process. JD Edwards EnterpriseOne Workflow Modeler contains buttons that represent all of the tasks and transitions that make up a JD Edwards EnterpriseOne Workflow process. You drag the buttons onto the JD Edwards EnterpriseOne Workflow Modeler workspace to create a diagram of a JD Edwards EnterpriseOne Workflow process from beginning to end. After you add tasks and transitions, you can right-click any task or transition and select one or more dialogs to configure that component of the process.

When you configure a new JD Edwards EnterpriseOne Workflow process in JD Edwards EnterpriseOne Workflow Modeler, the Start and End tasks automatically appear in the JD Edwards EnterpriseOne Workflow Modeler workspace.

Using JD Edwards EnterpriseOne Workflow Modeler Toolbar

JD Edwards EnterpriseOne Workflow Modeler uses a dockable toolbar called Object Creation Tools, which contains the buttons needed for adding tasks and transitions to a JD Edwards EnterpriseOne Workflow process. Each button in the toolbar is described below. You can use the hover help to identify each button.

Icon	Function
Default (pointer)	Allows you to move tasks and transitions in the graphical user interface.
Transition	Attaches one task to another, indicating flow within the process. You can add a transition condition to a transition. Transition conditions contain the logic for determining which task is acted upon next in the JD Edwards EnterpriseOne Workflow process.
Batch Application	Identifies the task as one that executes a batch process or report.
Business Function	Identifies the task as one that executes a business function for special logic processing. For example, the Update task in the Credit Limit Changed example is a business function that updates the database with changes.

Icon	Function
Local Subprocess	Identifies the task as a JD Edwards EnterpriseOne Workflow subprocess.
Information	Identifies the task as one that sends a message to a user or users.
Action	Identifies the task as one that sends a message to a user or users that has to be acted upon.
Halt	Identifies the task as one that halts all activity on the line beyond itself until the specified date occurs or the specified amount of time passes.

Note. The buttons at the bottom of the toolbar, including the Remote Subprocess button, are reserved for future use.

Opening a New JD Edwards EnterpriseOne Workflow Process in JD Edwards EnterpriseOne Workflow Modeler

Access OMW.

Note. You must first create the JD Edwards EnterpriseOne Workflow process in OMW before you can open it in JD Edwards EnterpriseOne Workflow Modeler.

1. In OMW, under the Objects menu in your project, click the JD Edwards EnterpriseOne Workflow process and then click the Design button in the center column.
2. On JD Edwards EnterpriseOne Workflow Design, click the Design Tools tab and then click Start JD Edwards EnterpriseOne Workflow Modeler.
3. Upon opening JD Edwards EnterpriseOne Workflow Modeler, click OK on the following message:

   This is a reminder to save your JD Edwards EnterpriseOne Workflow process using the File, Save menu option in JD Edwards EnterpriseOne Workflow Modeler before you exit.

   A diagram of the JD Edwards EnterpriseOne Workflow process appears in the JD Edwards EnterpriseOne Workflow Modeler workspace, with the Start and End tasks automatically created for you.
4. On JD Edwards EnterpriseOne Workflow Modeler, use the buttons in the Object Creation Tools toolbar to add and configure the appropriate tasks and transitions to the JD Edwards EnterpriseOne Workflow process.

Adding Tasks to a JD Edwards EnterpriseOne Workflow Process

This section provides an overview of adding tasks and the "and join" property and describes how to add a task to a JD Edwards EnterpriseOne Workflow process.

Understanding How to Add Tasks

You can use JD Edwards EnterpriseOne Workflow Modeler to add these tasks to the JD Edwards EnterpriseOne Workflow process:

- Batch Application
- Business Function
- Local Subprocess
- Information Task
- Action Task
- Halt

Joining Tasks

Every task has an "and-join" property. This property only matters if a task has multiple transitions leading into it. If the and-join property is checked, it requires that each transition leading to the task must complete before the task will begin. If the and-join property is not checked, only one transition leading to the task must complete for the task to begin.

Prerequisite

Create a JD Edwards EnterpriseOne Workflow process in OMW. See Creating a JD Edwards EnterpriseOne Workflow Process in the JD Edwards EnterpriseOne Workflow Guide.

Adding a Task

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In OMW, click the JD Edwards EnterpriseOne Workflow process to which you want to add the task, and then click the Design Tools button. On JD Edwards EnterpriseOne Workflow Design, click the Design Tools tab, and then click Start JD Edwards EnterpriseOne Workflow Modeler.
2. In JD Edwards EnterpriseOne Workflow Modeler, click one of these buttons, which represent the tasks that you can add to the process (the name of each task appears when you hover over the button):
   - Batch Application
   - Business Function
   - Local Subprocess
   - Information Task
   - Action Task
   - Halt

   Note. The buttons at the bottom of the toolbar, including Remote Subprocess, are reserved for future use.
3. Drop the task onto the diagram by clicking anywhere in the diagram.

   The JD Edwards EnterpriseOne Workflow Task Revisions form appears with the name of the task that you are adding in the title bar.

4. On JD Edwards EnterpriseOne Workflow Task Revisions, complete these fields:
   - Task

     Type the name of the task that you are adding to the JD Edwards EnterpriseOne Workflow process. The name must contain no more than 10 alphanumeric characters.
   - Description
5. Complete these optional fields if you want to include any customizable data:
   - Category Code 1
   - Category Code 2
   - Category Code 3

   Note. You must first customize the category codes with descriptions and values using the User Defined Codes (P0004A) program. See User Defined Codes in the Foundation Guide for more information about category codes and customizing UDCs.
6. If you want the task to be a Join task, select the And Join (Y/N) option.
7. Click OK.

   The task appears in the JD Edwards EnterpriseOne Workflow Modeler workspace.

   Note. After you add the task to the JD Edwards EnterpriseOne Workflow Modeler workspace, you must connect the task to other tasks by adding transitions and transition conditions. You must also configure the task by adding event rules and other data to the task.

Working with Transitions and Transition Conditions

This section provides an overview of transitions and transition conditions and describes how to:

- Add a transition
- Create a transition condition
- Attach a transition condition

Understanding Transitions and Transition Conditions

A transition is the path between tasks. It connects one task to the next task in a JD Edwards EnterpriseOne Workflow process. Transition conditions are user-defined rules that determine when the JD Edwards EnterpriseOne Workflow process will continue to the next task. Transitions can contain transition conditions.

You can attach multiple transitions to a task. Each transition is a possible path that the JD Edwards EnterpriseOne Workflow process may follow. The transition condition attached to each transition contains the criteria that determine if the process will follow that transition path. For example, a transition condition named IFAPPROVE might trigger the system to invoke a task that updates the database if a user approves a message, and then invoke a task that sends a message notifying the originator that the message was approved. A transition condition called IFREJECT might trigger the system to invoke a task that sends a message notifying the originator that a message was rejected.

Adding a Transition

Access JD Edwards EnterpriseOne Workflow Modeler.

1. On JD Edwards EnterpriseOne Workflow Modeler, click the Transition button on the toolbar.
2. Click and drag the mouse from the task at which you want the transition to originate to the task to which you want the transition to connect.

   The transition appears in the workspace.

Creating a Transition Condition

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click anywhere in the background of the diagram. From the pop-up menu, select Transition Conditions and then click Add.

   Alternatively, you can create and attach a transition condition at the same time. To do so, right-click a transition and, from the pop-up menu, select Transition Conditions, and then select Add and Attach.
2. On Process Rule Revisions, type the name of the transition condition in the Rule field.
3. Complete these optional fields and click OK:
   - Description
   - Category Code 1
   - Category Code 2
   - Category Code 3

   Note. Category codes are fields that you can customize to include additional data about the object.
4. On Criteria Design, create the rule and then click OK.

   The system returns to the JD Edwards EnterpriseOne Workflow Modeler.

Note. If you chose Add as opposed to Add and Attach, you must attach this transition condition to a transition.

See Chapter 5, "Creating a JD Edwards EnterpriseOne Workflow Process," Attaching a Transition Condition to a Transition, page 33.

Attaching a Transition Condition to a Transition

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click the transition to which you want to attach the transition condition.
2. From the pop-up menu, select Transition Conditions and then select Select and Attach.

Note. If you want to create a transition condition and attach it to a condition at the same time, select Add and Attach from the pop-up menu. The Process Rule Revisions form will appear.

See Chapter 5, "Creating a JD Edwards EnterpriseOne Workflow Process," Creating a Transition Condition, page 33.

3. Select the transition condition that you want to attach to the task, and click Select.

   The system returns to JD Edwards EnterpriseOne Workflow Modeler with the name of the transition condition next to the transition.

Working with Batch Application Tasks

This section provides an overview of batch application tasks and describes how to configure a batch application task.

Understanding Batch Application Tasks

A Batch Application task starts a JD Edwards EnterpriseOne batch application, such as a report or batch process. For example, you can create a task that runs the General Ledger Post Report (R09801) or the Leadtime Rollup batch process (R30822A).

Configuring a Batch Application Task

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click the Batch Application task that you added to the diagram, and then select Event Rules from the menu.
2. On Work With Applications, search for the batch process that you want to attach to the task and then highlight it.
3. In the Select Version area at the bottom of the form, select one of these options to determine how the UBE will be selected:
   - Yes

     Select this option to select a particular version from the list of available versions.
   - No

     Select this option if you want the users to select the version at runtime.
4. Click Select.
5. If you chose Yes on Work with Versions, select a version and then click Select.

   Note. If the batch process contains processing options, you must enter the required data for the processing options before continuing.

6. On UBE Interconnections, from the Available Objects list, select the object that you want to pass. Click the > button to add the object to the Data Structure-Value column.

Note. You might not need to pass data in the JD Edwards EnterpriseOne Workflow process. Whether you pass data in or receive data from a JD Edwards EnterpriseOne Workflow process, the Batch Application task must have a report interconnect data structure to be able to call it.

The Include in Transaction option has no effect on the system. Do not use.

7. Indicate the direction of data flow between Value and Data Items by clicking the Directional arrow between the two columns.

   If you do not want data to pass between the task and the batch process, set all Direction values to W by clicking the button in the Dir field

   Note. The values of the key data structure cannot change. Therefore, you cannot map a data item back to an item in the key data structure.

8. Click OK.

Using Business Function Tasks

This section provides an overview of business function tasks and describes how to configure a business function task.

Understanding Business Function Tasks

A business function task attaches a business function for special logic processing, including any business functions written in C programming language or NERs written with event rules.

Prerequisite

Create a business function or an NER if one does not exist.

See *JD Edwards EnterpriseOne Tools 8.97 Development Tools: APIs and Business Functions Guide*, "Using Business Functions".

Configuring a Business Application Task

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click the Business Function task that you added to the grid, and then select Event Rules from the menu.
2. On Business Function Search, select the business function that you want to attach to the Business Function task and then click Select.
3. On Business Functions, map the parameters that you want to pass to the data item.

   For example, map BF mnAddressNumber to mnAddressNumber and map BF mnCurrentCreditLimit to mnCurrentCreditLimit.

The only values available to pass to the business function are those from the key and additional data selections. When you pass these values to the Data Item column of the form, you send the corresponding data items from the JD Edwards EnterpriseOne Workflow key and additional data selections to the function.

Note. The values of the key data structure cannot change. Therefore, you cannot map a data item back to an item in the key data structure.

4. Click OK.

Using Local Subprocess Tasks

This section provides an overview of local subprocess tasks.

Understanding Local Subprocess Tasks

A Local Subprocess task starts another process, also referred to as a subprocess. A subprocess has its own set of tasks. When you add a Local Subprocess task, you are attaching an existing JD Edwards EnterpriseOne Workflow process to the JD Edwards EnterpriseOne Workflow process that you are creating.

Subprocesses are useful when you have groups of tasks common to multiple JD Edwards EnterpriseOne Workflow processes or a subset of tasks that recur within the same JD Edwards EnterpriseOne Workflow process. You can configure a Local Subprocess task so that the subprocess returns values to the parent JD Edwards EnterpriseOne Workflow process.

Configuring a Local Subprocess Task

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click the Local Subprocess task that you added to the grid, and then select Event Rules from the menu.
2. On System Functions, define parameters for these data items:
   - Process Name
   - Key Data Structure
   - Additional Data Structure
3. Click OK.

Using Halt Tasks

This section provides an overview of the Halt task and describes how to configure a Halt executable task.

Understanding Halt Tasks

A Halt task stops the JD Edwards EnterpriseOne Workflow process and specifies a period of time that must pass before the process can continue.

For example, suppose you have a process for submitting a contract proposal to a client. The client has two weeks to accept the proposal or the contract is voided. After the contract is entered, the system activates a JD Edwards EnterpriseOne Workflow process, using a Halt task, that puts the contract on hold for two weeks. At the end of the two weeks, when the JD Edwards EnterpriseOne Workflow process resumes, a Business Function task checks the status of the contract. If the contract has been accepted, nothing happens. If the contract has not been accepted, the status is changed to Void and a notification is sent to the client.

When you set up a Halt task, you specify either hours and minutes or the date and time at which you want the process to resume.

If you add Halt tasks to the JD Edwards EnterpriseOne Workflow process, you must run the Start Escalation Monitor batch process (R98810) regularly. You can run it manually or by using the Scheduler application. If you do not run the Start Escalation Monitor, the process will remain halted. The Start Escalation Monitor resumes the process after the date and time are met.

Configuring a Halt Task

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click the halt task that you added to the grid, and then select Expiration from the menu.
2. On Expiration Information, complete the Hours and Minutes fields or the Date and Time fields with the values for when you want the system to move to the next task in the JD Edwards EnterpriseOne Workflow process.
3. Click OK.

   For example, you enter 8 hours and 30 minutes in the Hours and Minutes fields. If the escalation monitor is run to check for expired activities 8 hours and 30 minutes from when that task within the process is started, the task is expired. The system expires the halted condition and moves to the next task.

Note. A halt task has no event rule definition.

Setting Up JD Edwards EnterpriseOne Workflow Scheduler

The JD Edwards EnterpriseOne Workflow Scheduler enables you to escalate expired message and halt instances either automatically or manually. For automatic execution, JD Edwards EnterpriseOne Workflow Scheduler runs on the enterprise server where JD Edwards EnterpriseOne Workflow Modeler resides. You set the Scheduler to run as frequently or as infrequently as you want, though it is recommended that you execute the JD Edwards EnterpriseOne Workflow Scheduler no more that once an hour. The JD Edwards EnterpriseOne Workflow runtime kernel reads the F98865 table to determine the tasks which have either expired or require escalation. For manual execution, you run the Scheduler by clicking the Start Escalation Monitor button in OMW.

1. Open the jde.ini file located on the enterprise server.
2. In [JD Edwards EnterpriseOne Workflow] section, change these parameters to the appropriate values:

- EscalationFrequency={seconds}

  This parameter is how frequently in seconds you want JD Edwards EnterpriseOne Workflow Scheduler to execute. The default value is 3600 seconds.

- WRIUser=<username>

  This parameter is a valid user name assigned to a JD Edwards EnterpriseOne account.

- WRIPassword=<userpassword>

  This parameter is a valid password assigned to a JD Edwards EnterpriseOne account.

- WRIEnvironment=<userenv>

  This parameter is a valid environment assigned to a JD Edwards EnterpriseOne account.

- WRIRole=<userrole>

  This parameter is a valid role assigned to a JD Edwards EnterpriseOne account.

- RUNTIME_INTEROP=ON

  Ensure that this parameters is set to On.

- NumberofAutoStartProcesses=1

  Ensure that this parameter is set to 1. You must define this parameter in the [JDENET_KERNEL_DEF13] section of the jde.ini file on the enterprise server.

Note. JD Edwards EnterpriseOne Workflow Scheduler runs within the JD Edwards EnterpriseOne Workflow kernel process. If you want the JD Edwards EnterpriseOne Workflow Scheduler to start along with the Enterprise server, then you have to set NumberofAutoStartProcesses to at least 1. This will start the number of JD Edwards EnterpriseOne Workflow kernels which you have specified.

Using Information and Action Tasks

This section provides overviews of Information and Action tasks, describes the contents of a JD Edwards EnterpriseOne Workflow message, and describes how to:

- Add escalation rules to an Action task
- Delete escalation rules from an Action task

Understanding Information and Action Tasks

Information and Action tasks send JD Edwards EnterpriseOne Workflow messages to users in the system. The tasks differ in these ways:

- Information tasks do not enable you to require an action from the recipient. Action tasks require that the recipient respond to the message.
- Information tasks do not enable you to assign escalation rules. Action tasks enable you to assign escalation rules.

You can create either task to send notification messages or messages that contain shortcuts to an interactive application such as a message approval form.

A JD Edwards EnterpriseOne Workflow process can contain several different Information or Action tasks. For example, a JD Edwards EnterpriseOne Workflow process designed for approving credit limit increases can include Information tasks that send these JD Edwards EnterpriseOne Workflow messages:

- A request for a credit limit increase with a shortcut to the Credit Limit Approval form
- A notification of the approval of a credit limit increase
- A notification of the rejection of a credit limit increase

Note. You can also use the Send Message Extended system function to send a message directly from an interactive or batch application, instead of using a either task.

To create an Information or Action task, you must define the contents and the recipients of the message. You can also add logic that contains conditions for routing messages.

Understanding the Contents of an Information or Action Task

When you create an Information or Action task, you must define the contents of the message. You can include these items in a JD Edwards EnterpriseOne Workflow message:

- Subject line and message text

  You can enter the message text directly into the Information or Action task or you can use a message template. A message template contains text that you enter, along with substituted values that are populated from the JD Edwards EnterpriseOne Workflow process key and additional data selections. After you create the message template, you attach it to the event rules in the Information or Action task.

  Alternatively, you can use a single object from the Available Objects list for the text of the message.

- Shortcut to an interactive application such as the Generic JD Edwards EnterpriseOne Workflow Approval Form (P98805)
- CC line

  You can enter people or distribution lists in the CC line so that the people listed there also receive the message.

- BCC

  You can enter people or distribution lists in the BCC line so that people listed there also receive the message, but the people listed in the Send To and CC lines cannot see who is listed on the BCC line.

- Media Object Name and Media Object Key

  You can attach useful information to an application, including information that might currently exist as a paper-based document. The media objects feature enables you to attach the information to JD Edwards EnterpriseOne software applications, forms and rows, and Object Librarian objects. The imaging feature within media objects gives you the flexibility to create an efficient method of information storage.

Note. You can create a new message template using JD Edwards EnterpriseOne Workflow Messages (P92002).

See Chapter 4, “Setting Up JD Edwards EnterpriseOne Workflow,” Setting Up Message Templates, page 20.

Prerequisite

Use a combination of Address Book number and structure type to specify the Information or Action task recipient.

See Chapter 4, “Setting Up JD Edwards EnterpriseOne Workflow,” Setting Up Message Templates, page 20.

If you are routing the message to a distribution list, determine which distribution list you want to send the message to. If necessary, first create the distribution list from Group Revisions (P02150).

See Chapter 5, “Creating a JD Edwards EnterpriseOne Workflow Process,” Setting Up Distribution Lists, page 53.

If you are using a recipient rule, you must first create the recipient rule.

If you are attaching a message template to a message, determine which message template the message will use. If necessary, first create the message template.

See Chapter 4, “Setting Up JD Edwards EnterpriseOne Workflow,” Setting Up Message Templates, page 20.

Using JD Edwards EnterpriseOne Workflow Recipients

An integral part of creating an Information or Action task involves determining to whom a message is sent. To define the recipient parameters, you need data items in either the key or additional data structure to hold the values that you pass into the JD Edwards EnterpriseOne Workflow process. You can assign literal values or map parameters that originate in an application, business function, or other object. The Start Process system function allows you to map a literal value, a variable, or a value from a form’s data structure or business view to the data items in the JD Edwards EnterpriseOne Workflow data structures. You can configure the event rules of an Information or Action task to route messages to these types of recipients:

- Members of a role

  JD Edwards EnterpriseOne software uses roles to define tasks and menus for different groups of users. Roles are created and maintained by a system administrator. If a role exists that contains the members that you want to include as the recipients of a JD Edwards EnterpriseOne Workflow message, you can attach the role to the event rules of an Information or Action task.

- Members of a distribution list

  JD Edwards EnterpriseOne Workflow uses distribution lists to group into categories for message routing purposes. You can further define how messages are routed to members of a distribution list by assigning routing criteria such as threshold values, escalation, and other conditional routing options.

  See Chapter 5, “Creating a JD Edwards EnterpriseOne Workflow Process,” Understanding Distribution Lists, page 47.

  See Chapter 5, “Creating a JD Edwards EnterpriseOne Workflow Process,” Setting Up Distribution Lists, page 53.

- Single recipient

  For JD Edwards EnterpriseOne Workflow processes that are designed to send a message to a single user, you select the <AB number> parameter and assign it a value from one of the JD Edwards EnterpriseOne Workflow data structures.

Note. If you use the address book number of a single user, you will have to revise the event rules of the JD Edwards EnterpriseOne Workflow process every time a new person is responsible for handling the messages sent by the JD Edwards EnterpriseOne Workflow process. It is recommended that you enter a role for the recipient, even if the role contains only one member.

Using JD Edwards EnterpriseOne Workflow Message Recipients

JD Edwards EnterpriseOne Workflow can send messages to roles, to distribution lists that use group processing, to distribution lists that use hierarchical processing, or to single recipients. JD Edwards EnterpriseOne Workflow can send messages to these different recipients or groups of recipients regardless of whether the message recipient is specified in the event rules or in the Escalation event rules.

In all cases, the recipient is determined by the combination of two fields: the recipient address (address book number) and structure type. If you specify only the recipient address, the message is sent directly to the address book number, regardless of whether it is a role or a single recipient. If you specify only the structure type, the message is sent to the distribution list using hierarchical processing. If you specify the recipient address and structure type, the message is sent to a distribution list using group processing.

The three possible combinations of recipient address and structure type are detailed below.

Recipient Address Only

When you enter only a recipient address, JD Edwards EnterpriseOne Workflow sends the message directly to the address book number that you entered. This recipient address field is labeled Address Number in the Information and Action task event rules and Address Book Number in the NER. Both field names refer to the same thing.

If you specify the recipient in the Information or Action task event rules, make sure that you specify the structure type as Single Recipient; do not leave it blank. Blank is the Accounts Receivable structure type; therefore, specifying blank for the Structure Type field in an Information or Action task event rules will result in the message being sent to the Accounts Receivable distribution list using group processing.

Note. If the address number is the parent number of a distribution list (for example, 7000 - the Accounting Group), the message is sent to only that address book number. Therefore, no members of that distribution list receive the message. You must fill in the structure type if you want to send to a distribution list.

Structure Type Only

When you enter a structure type but no recipient address, JD Edwards EnterpriseOne Workflow sends the message to a distribution list using hierarchical processing. Specifically, JD Edwards EnterpriseOne Workflow finds the address number for the person who originated the initial request, and then finds that person in the specified structure type. Next, it finds the parent of the originator and sends the message to that parent.

For example, suppose the message is to be sent to structure type WFS. The originator (for example, 7101 - Clerk #1) must be a member of structure type WFS. The system looks up Clerk#1 in structure type WFS and finds the parent. In this scenario, the message is sent to the manager of 7101, which is 7201 (Manager #1). If 7201 approves the message, the system then sends it to 7301. If 7301 approves the message, it then sends it to 7402 (Vice President #2), and so on up the distribution list (unless threshold values are used and the threshold value for one of the members is reached). The message is never sent to a level below or lateral to 7101, such as 7102 (Clerk #2) or 7202 (Manager #2).

Recipient Address and Structure Type

When you specify both a recipient address and a structure type, JD Edwards EnterpriseOne Workflow sends the message to a distribution list using group processing. Specifically, JD Edwards EnterpriseOne Workflow determines to whom the message is sent based on the specified address book number; finds its direct children in the particular structure type and the groups to which they belong; and then sends the message to Group 1, and then to Group 2, and so on. The recipient address and structure type combination that you enter must be a valid combination in the Address Book Parent/Child table (F0150) for this process to work.

For example, suppose you enter Address Book number 7000 (Accounting Group) from the distribution list and structure type EML. If an approval message is sent to this group specifying that a customer's credit limit needs to be raised to 40,000 USD, the system first finds the employees within Group 1 of the Accounting Group distribution list and routes the message to them for approval. Routing continues for all groups in the list as long as the threshold values of the members of that list are less than or equal to 40,000 USD.

See Chapter 5, "Creating a JD Edwards EnterpriseOne Workflow Process," Creating a Distribution List for Group Processing, page 55.

Understanding Methods for Routing Messages

In addition to specifying a role, distribution list, or a single recipient as the message recipient, you can use these rules to further define how messages are routed:

- You can route messages using Event Rule logic in Business Function tasks.

  You can create a NER in a business function in OMW and attach it to a Business Function task to override the recipient defined in the event rules of the task. The following example shows and NER created for a credit limit change. It routes the approval message. Address book number 3003 represents a customer. Address book number 4803 represents the manager of the approval department. Address book number 7405 represents a distribution list for the accounts receivable department.

  If the request for a credit limit change is for customer 3003, send the request for approval message to address book number 4803. If the request is for any other customer, send the request to address book number 7405.

  ```
  If BF mnAddressNumber is equal to "3003"
  BF mnSendToAddress = "4803"
  Else
  BF mnSendToAddress="7405"
  End If
  ```

- Escalation rules

  Escalation rules will resend the message to a new recipient if the original recipient does not act on the message within a certain time. You set up escalation so that a JD Edwards EnterpriseOne Workflow process continues if one of the original recipients of a JD Edwards EnterpriseOne Workflow message does not respond.

See Also

Chapter 5, "Creating a JD Edwards EnterpriseOne Workflow Process," Including Escalation Rules to an Action Task, page 45

Cross reference to business function guide

Configuring an Information or Action Task

Configuring an Information or Action task involves defining event rules, which contain parameters that specify the content of the JD Edwards EnterpriseOne Workflow message, the recipient of the message, and the conditions for sending messages.

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click the Information or Action task and then select Event Rules from the pop-up menu.

Note. You must insert a value for every data item in the Parameters area.

2. On System Functions, complete a combination of these fields to specify the recipient:

   • Recipient

   Enter the address book number of the distribution list, role, or single recipient to whom the message will be sent. Leave this field blank to send to a distribution list using hierarchical processing.

   Note. If you are specifying a single recipient, it is recommended that you use a role instead of an individual's address book number, even if the role contains only one member. If you use a single user's address book number, you will have to revise the event rules of the JD Edwards EnterpriseOne Workflow process every time a new person is responsible for handling the messages sent by the JD Edwards EnterpriseOne Workflow process.

   • Structure Type

   Enter the structure type of the distribution list to which the message will be sent. If the recipient is a role or single recipient, leave this field blank.

3. Specify the mailbox to which you want the message delivered in the Work Center.

   For example, you might select the Credit Management queue for a credit limit approval message.

4. Highlight the Mailbox row.

5. In the Available Objects area, select a mailbox (or queue).

   Note. You can use one of the existing queues in the system or create a new queue. If the Information or Action task sends messages to an external messaging system, the JD Edwards EnterpriseOne Workflow engine will ignore the value that you specify for the Mailbox.

   See Chapter 4, "Setting Up JD Edwards EnterpriseOne Workflow," Setting Up Queues, page 19.

6. To include a subject line in the message, highlight the Subject row and then select the corresponding data item that contains the subject text, if applicable. You can also enter a subject as a literal value.

   If the message does not require a subject, select <Blank>. You would most likely select <Blank> when using a message template (a data dictionary message), which would already contain a subject line.

7. To add static text to the message, highlight the Text row and select the corresponding data item that contains the text for the body of the message. You can also enter the text as a literal value. If you do not need to use the Text data item, select <Blank>.

   Note. You can use the Text parameter to add supplemental text to a message template. This text will appear above the message template text when the user opens the message.

8. To attach a shortcut to a JD Edwards EnterpriseOne Workflow message, highlight the Active row, and then perform the following steps. If you are not attaching a shortcut, select <None> from the Available Objects area.

   Important! Attaching a shortcut to a message will suspend the JD Edwards EnterpriseOne Workflow process until the message is acted upon.

9. In the Available Objects area, double-click <Define Active Message>.

10. On Work With Applications, in the Query by Example row, enter the application that you want the shortcut to launch, and then click Find.

    For example, if you want to use the Generic JD Edwards EnterpriseOne Workflow Approval Form, enter P98805 and click Find.

11. On Work With Forms, double-click the row containing the form that you want to use.

12. On Form Interconnections, map the data structures to the appropriate available objects.

    See *JD Edwards EnterpriseOne Tools 8.97 Development Tools: Form Design Aid Guide*, "Working with Forms," Creating a Modal Form Interconnection.

13. Click OK.

    The system returns to the System Functions form.

14. To attach a message template, highlight the Message row, and then perform the following steps. If you are not using a message template, select <None> from the Available Objects area.

15. In the Available Objects area, double-click <Define Message>.

16. On Text Substitution, enter the name of the message that you want to use in the Dictionary Item field and click Find.

    For example, you might enter LM1235 for the Credit Limit Approval message.

17. From the Available Objects list, select each data item that contains the value that you want to substitute into the message and click OK.

18. For the Message Key parameter, select <None> from the available objects.

    The JD Edwards EnterpriseOne Workflow engine no longer uses this parameter, but it needs to be mapped.

19. After you have finished mapping all of the parameters for the Information or Action task, click OK.

Adding Escalation Rules to an Action Task

You set up escalation so that a JD Edwards EnterpriseOne Workflow process continues if one of the original recipients of a JD Edwards EnterpriseOne Workflow message does not respond. To add escalation to an Action task, you must add escalation rules, which are conditions that will resend a message to a new recipient if the original recipient does not act on a message within a certain time. You cannot add escalation rules to an Information task.

When you use an escalation rule, you can attach a new message to the original message and then define to whom or to which distribution list the escalated message is sent. You must also activate the Check for Expired Tasks (R98810), which is a batch program that checks for Action tasks containing escalation and forwards any messages that have not been acted upon by the escalation recipient.

Escalation only works in these instances:

- The original message contains a shortcut.
- The original recipient of the JD Edwards EnterpriseOne Workflow message is part of a distribution list.

Note. While the system enables you to set up escalation rules even if the original recipient is a single recipient or a member of a role, the escalation rules will not work properly.

You can set up escalation rules so that an escalated message is sent to one of these types of recipients:

- Distribution List

  The escalated message is sent to a distribution list. This requires that the original message be sent to a distribution list, and that the two lists have the same number of groups. This is because the message is escalated to members of the same group number in the next distribution list.

- Original Distribution List

  If the original message is sent to a distribution list with multiple groups, then you can also set up the escalation to send the message up to the next group. In the example, if the current message is sitting at group 1 (1001) while the message is escalated, it will be escalated to group 2 (1002 and 1003). To escalate the message to the next higher group, enter the address book number and the structure type of the original distribution list in the escalation rules.

- Single Recipient

  The escalated message is sent to one person only. The escalated message will be sent to the same person for all groups.

Note. Escalating messages to a single user is not recommended. If you use a single user's address book number, you will have to revise the JD Edwards EnterpriseOne Workflow process's event rules every time a new person is responsible for handling the escalated message sent by the JD Edwards EnterpriseOne Workflow process.

You cannot send a message that contains a shortcut to an external email address. Since escalated messages contain shortcuts, you cannot use an external email address as the recipient of an escalated message.

Including Escalation Rules to an Action Task

Access Process Modeler.

1. Right-click the Action task, select Escalation, and then select Add and Attach.
2. On Escalation Rules, complete these fields:
   - Escalation Rule

     Type a unique name for the escalation rule.

   - Description
3. At this time, do not complete any of the fields in the grid and click OK to continue.

   The system returns you to the JD Edwards EnterpriseOne Workflow diagram in JD Edwards EnterpriseOne Workflow Modeler.
4. Right-click the Action task, select Escalation, and then select Event Rules.
5. On System Functions, complete a combination of these fields to specify the recipient of the escalated message:
   - Address Book Number

     Enter the address book number of the distribution list, role, or single recipient to whom the escalated message will be sent.

   - Structure Type

     Enter the structure type of the distribution list to which the escalated message will be sent. If the recipient is a role or single recipient, leave this field blank.

6. Specify the mailbox to which you want the escalated message delivered in the Work Center.

   For example, you might select the Credit Management queue for a credit limit approval message.

7. Highlight the Mailbox row.
8. In the Available Objects area, select a mailbox (or queue).

   Note. You can use one of the existing queues in the system or create a new queue.

   See Chapter 4, "Setting Up JD Edwards EnterpriseOne Workflow," Setting Up Queues, page 19.

9. To include a subject line in the escalated message, highlight the Subject row and then select the corresponding data item that contains the subject text, if applicable. You can also enter a subject as a literal value.

   If the message does not require a subject, select <Blank>. You would most likely select <Blank> when using a message template (a data dictionary message), which would already contain a subject line.

10. To add static text to the escalated message, highlight the Text row and select the corresponding data item that contains the text for the body of the message. You can also enter the text as a literal value. If you do not need to use the Text data item, select <Blank>.

    Note. You can use the Text parameter to add supplemental text to a message template. This text will appear above the message template text when the user opens the message.

11. For the Shortcut parameter, select <None> from the Available Objects list.

    The escalated message uses the shortcut from the original message.

12. To attach a message template, highlight the Message row, and then perform the following steps. If you are not using a message template, select <None> from the Available Objects area.
13. In the Available Objects area, double-click <Define Message>.
14. On Text Substitution, enter the name of the message that you want to use in the Dictionary Item field and click Find.

    For example, you might enter LM1235 for the Credit Limit Approval message.

    See Chapter 4, "Setting Up JD Edwards EnterpriseOne Workflow," Setting Up Message Templates, page 20.

15. From the Available Objects list, select each data item that contains the value that you want to substitute into the message and click OK.
16. For the Message Key parameter, select <None> from the available objects.

    The JD Edwards EnterpriseOne Workflow engine no longer uses this parameter, but it needs to be mapped.

17. After you have finished mapping all of the parameters for the escalated message, click OK.

Deleting Escalation Rules from an Information or Action Task

Access JD Edwards EnterpriseOne Workflow Modeler.

1. Right-click the Action task to which you added escalation.
2. From the pop-up menu, select Escalation and then Delete.

Working with Distribution Lists

This section provides overviews of structure types, roles, and distribution list guidelines.

Understanding Distribution Lists

JD Edwards EnterpriseOne Workflow uses distribution lists to place employees into groups for message routing purposes. You assign users to a distribution list and then define the event rules of an Information or Action task to determine how messages will be sent to the members of that list.

Distribution lists are based on an address book number and a structure type. The address book number serves as the parent node of the distribution list. The members of the distribution list are then organized as children under this parent address book number. How you set up the children is dependent upon the type of processing that you want to use.

JD Edwards EnterpriseOne Workflow uses two different types of processing to route messages to members of a distribution list: group processing and hierarchical processing. Group processing sends messages to the members of a distribution list one group at a time. These groups are defined when you create the distribution list. Hierarchical processing sends messages to the members of a distribution list based on the organizational hierarchy defined in the distribution list.

Using Distribution Lists Used for Group Processing

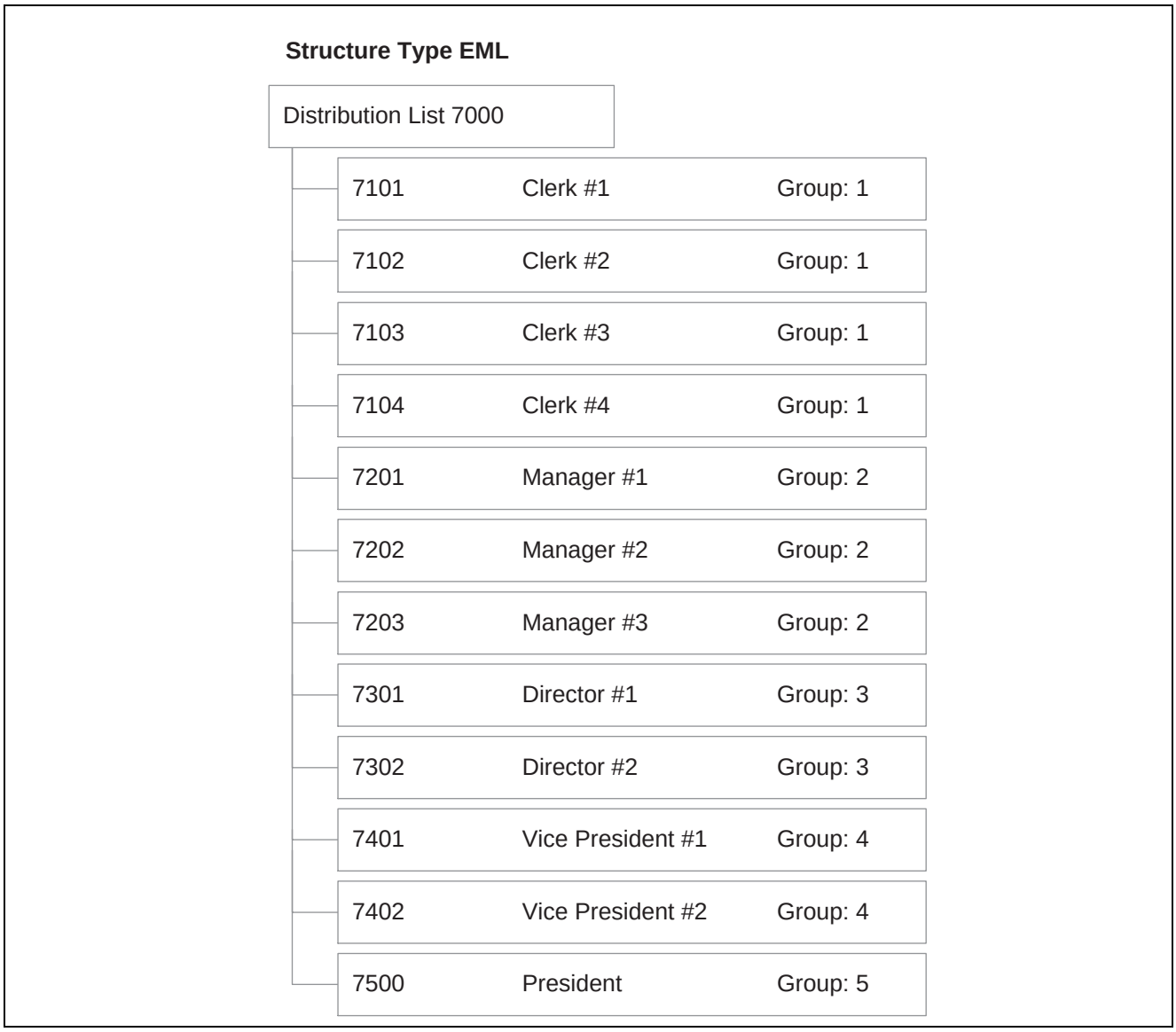
When you can create a distribution list for group processing, you assign all the members as the direct children of the distribution list's address book number. You then divide the members of the distribution list into groups. For example, you might organize six members of a distribution list into Group 1, five members into Group 2, and two members into Group 3. When the system sends a message to this distribution list, it first sends the message to Group 1, then it sends the message to Group 2, and finally it sends the message to Group 3.

Note. It is recommended that you use roles as the members of a distribution list that uses group processing rather than address book numbers of individuals. In general, this practice will results in easier maintenance of the list as people change positions within the enterprise.

When you use group processing, do not send a message to the parent address book number of the distribution list. Since this parent address book number is just a placeholder and not a user, the message will never be acted upon and, therefore, the JD Edwards EnterpriseOne Workflow process will not complete.

Example: A Distribution List Used for Group Processing

This example shows a distribution list with its members organized into groups for group processing. A message will be sent to everyone within each group in the distribution list, one group at a time, starting with Group 1.



Group Processing Distribution List

Working with Additional Routing Features for Distribution Lists

You can further define distribution lists in JD Edwards EnterpriseOne Workflow using these features:

- Threshold values
- Routing options
- Escalation hours and minutes

Threshold Values

JD Edwards EnterpriseOne Workflow uses threshold values in conjunction with distribution lists to determine if a member of the list will be involved in a particular approval process. That is, the threshold value will determine whether a particular member has authority or if the members of the next higher group must also approve the message.

When you set up a distribution list, you can enter a threshold value for each employee on the list. If a particular JD Edwards EnterpriseOne Workflow process contains a value that is below a member's threshold value, then the system does not send a message to that member.

For example, if you use the associated data item AG (Amount-Gross) and enter a threshold value of 30,000 USD, the system compares the AG data item of the JD Edwards EnterpriseOne Workflow process against the threshold value. If a customer's credit limit amount has been increased, the system sends a notification message regarding the change to those people whose threshold value is less than or equal to the amount in the Amount-Gross field on the Credit Information form.

You can also use groups in conjunction with threshold values. For example, in Group 1, two members might have threshold values of 10,000 USD and two other members might have threshold values of 25,000 USD. Group 2 also has two members who have threshold values of 25,000 USD. If the system sends a message to the distribution list for a credit limit approval of 20,000 USD, the two members within Group 1 that have a threshold value of 10,000 USD receive the message.

Routing Options

You can specify conditional routing to control the path of approvals within a distribution list. These routing options are as follows:

Routing Option	Description
First Response	Indicates that if a JD Edwards EnterpriseOne Workflow message is sent to the members of a group within a distribution list and all members in that group have the same threshold value, then only one of them must respond. After the first response is received by the JD Edwards EnterpriseOne Workflow system, messages to the other members of that same group are deleted from their queues, and the approval process continues. For example, if Clerk 7101 from Group 1 responds to a message first, then messages are deleted from the other recipient queues for that group. The First Response routing option is normally used when members of a group have the same authority in the approval process. If you do not select this option, all members of the group to which the JD Edwards EnterpriseOne Workflow message is sent must respond before the approval process continues.

Routing Option	Description
Higher Level Overrides	Indicates that a member in a higher-level group can approve a change through the Process Task Monitor. All lower-level approvals are marked as Bypassed in the monitor, and messages to other members are deleted from their queues. If you do not select this option, then a member in the higher-level group cannot approve the change before the lower group approves it. For example, if the Vice President (7401) approves a change through the monitor, all the messages that were sent to others within the distribution list below the Vice President are deleted from their queues. If the Vice President is the last person who needs to approve the message, then the message is complete; if not, the message goes to the next highest group member.
Authorization Required	Indicates that if a member in the distribution list initiates a JD Edwards EnterpriseOne Workflow transaction (such as a salary increase), it requires authorization from a higher-level member. The higher-level member receives the message regardless of the threshold value of the higher-level member. If you do not select this option, no higher-level person is required to act on the message if it is below the threshold value. For example, if Manager #2 (7202) approves a salary increase for himself, his employee information is not updated with that change unless his supervisor authorizes or approves the JD Edwards EnterpriseOne Workflow message.

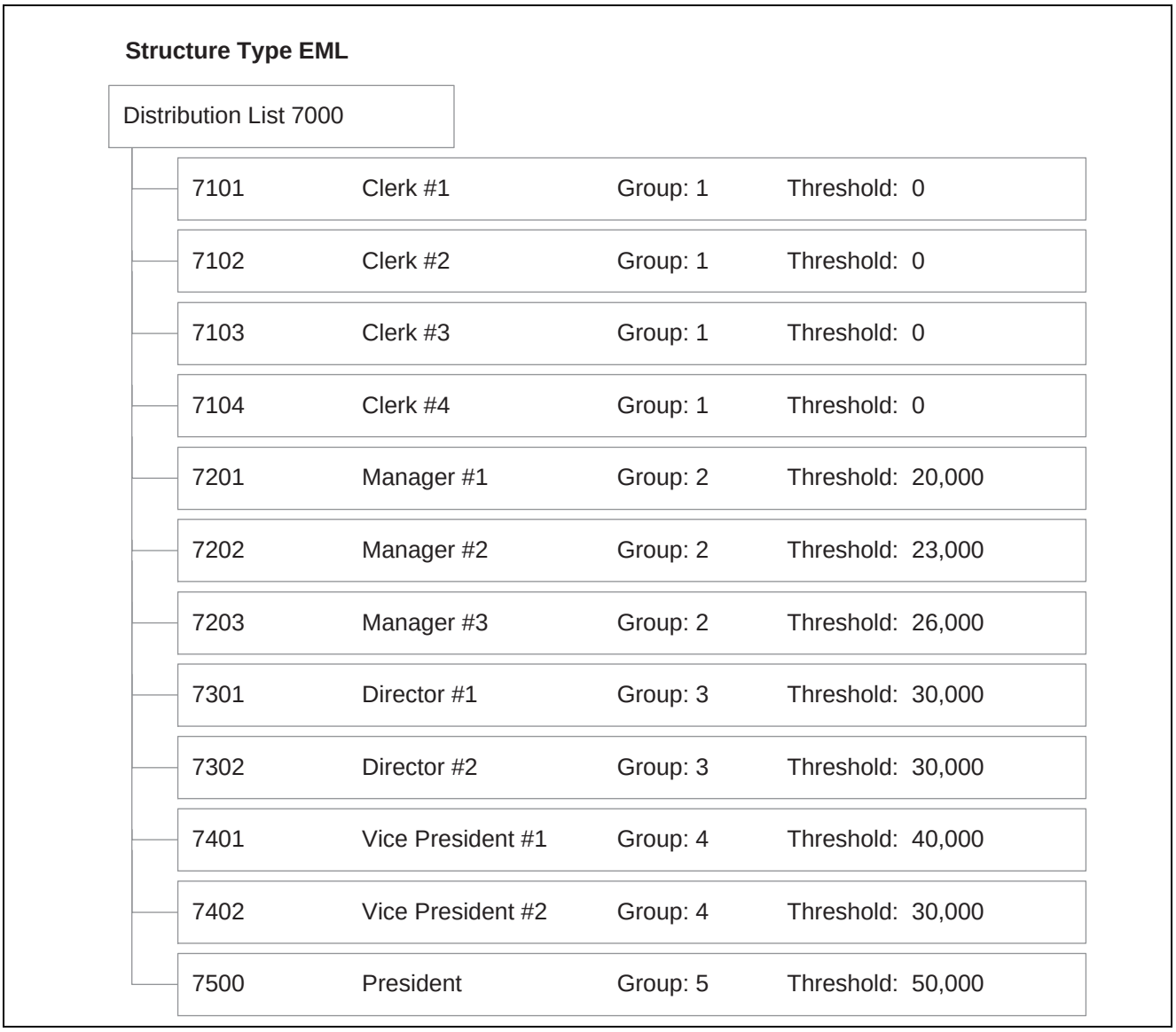
Escalation Hours and Minutes

Along with threshold values and routing options, you can also add escalation hours and minutes for each employee on a distribution list. Escalation hours and minutes specify the amount of time that the recipient has to respond before a message is escalated to another recipient.

If you categorize members of a distribution list into groups, you must add the same escalation hours and minutes for each member within one group. For example, if one member of Group 1 has 8 escalation hours and 30 escalation minutes assigned to him, then all other members of Group 1 must have 8 escalation hours and 30 escalation minutes assigned to them.

Example: Using Additional Routing Features with Group Processing

This example shows a distribution list designed for group processing. All of its members are organized into groups. Notice that each member is assigned a threshold value. The scenarios that follow the illustration describe how messages would be routed based on various criteria.



Group Processing for Distribution Lists

Scenario 1

A message with a value of 25,000 is first sent to Group 1 (members 7101, 7102, 7103, and 7104) because their threshold values are less than 25,000. If any of these recipients reject the message, the task completes and the message is not sent to the other groups. However, if all of these members approve the message, it is sent to Manager #1 and Manager #2 in Group 2 (members 7201 and 7202) for their approval because they are in the next highest group on the distribution list and have threshold values that are less than 25,000. Manager #3 and members in groups 3, 4, and 5 (members 7301, 7302, 7401, 7402, and 7500) do not receive the message because their threshold values are greater than 25,000.

An exception is if the message originator is a member of the distribution list to which the message is sent. In this case, the message is sent to the first group above the originator's group. For example, a message that is sent by 7202 and has a value of 35,000 is first sent to Group 3 (members 7301 and 7302) because these members are in the group above 7201. Only after both 7301 and 7302 accept the message does the task complete. The system does not need to send the message to the next group (Group 4) because the value in the message does not meet the threshold values assigned to that group. The thresholds for the next group (Group 4) are greater than 35,000.

Scenario 2

Manager #1 (7201) enters a credit limit increase request for 24,000 USD. Since Manager #1 is in Group 2 of the distribution list, the system will start looking at the next group, Group 3. Because this value is under the threshold value for Group 3, no message will be sent. These two exceptions to this scenario exist:

- If Authorization Required is turned on in this distribution list, then the message will be sent to Group 3 even though the credit limit request of 24,000 is smaller than the threshold value of Group 3.
- If the originator is in the highest group, then the system starts looking at the level of the originator since there is no higher level at which to start. For example, if the president enters a credit limit increase request for 24,000, the system starts checking threshold value criteria against Group 5. In this case, no message will be sent because 24,000 is smaller than the threshold value of Group 5.

See Chapter 11, "Understanding Distribution List Scenarios," Distribution List Scenarios, page 81.

Working with Distribution Lists Used for Hierarchical Processing

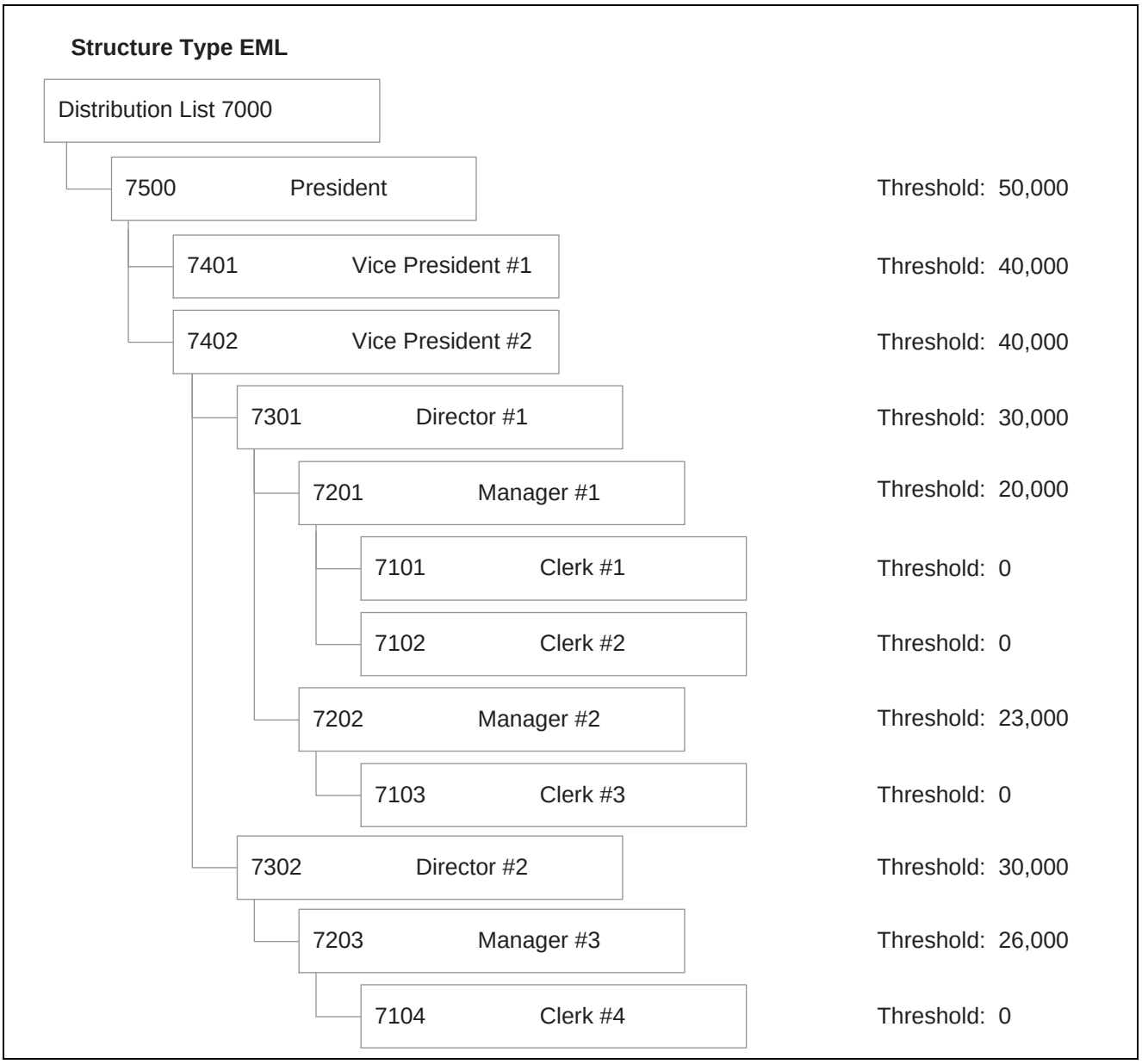
You can arrange distribution lists into a hierarchical or organizational tree structure, such as the president and all vice presidents within the company, with the employees listed under each of the parents. Hierarchical processing sends messages to the parents within the distribution list, one parent at a time, based on the originator's position in the hierarchy. After the first-level parent in the list receives the message, the system then determines whether the members above that parent should receive the message based on threshold value. If no threshold values exist for the members beneath a particular parent, the message is sent to all members beneath that parent.

Note. In a distribution list that uses hierarchical processing, the originator of a message must be a member of the distribution list. The message routing always starts with the parent of the originator.

For hierarchical processing, you cannot include an individual in more than one distribution list of the same structure type. This inclusion can result in circular or ambiguous hierarchies that JD Edwards EnterpriseOne Workflow is unable to reconcile.

Example: A Distribution List Used for Hierarchical Processing

In this example, each member of the distribution list has only one direct parent. A message with a value of 45,000 that is sent by 7102 (Clerk #2) is first sent to 7201 (the manager of Clerk #1). If this manager approves the message, then 7301 (Director #1) receives the message. After 7301 approves it, the message is sent to 7402. The task is then complete because the parent of 7402 (7500) has a threshold value of 50,000, which is greater than the value of the message, which is 45,000. If any parent within this structure rejects the message, the task completes.



Hierarchical Processing Distribution List

Setting Up Distribution Lists

This section provides overviews of structure types, roles, and distribution list guidelines.

Understanding How to Set Up Distribution Lists

You set up distribution lists to route messages to certain groups of employees. When you create a distribution list, you first add a parent address book number using Address Book (P01012). Next, you use Group Revisions (P02150) to add members to the distribution list as children of the parent address book number. Finally, you attach the distribution list to an Information or Action task. When a JD Edwards EnterpriseOne Workflow process invokes an Information or Action task, JD Edwards EnterpriseOne Workflow uses the distribution list that is attached to the Information or Action task to determine to whom the message is sent.

Before you create a distribution list, you must decide whether the distribution list will use group processing or hierarchical processing. Also, if you do not want to use an existing structure type for the distribution list, you must add one to the system using the User Defined Codes (P0004A) program.

For group processing, create a distribution list in which all members are first-level children of the address book number of the distribution list. You can then arrange members into groups.

For hierarchical processing, create a distribution list that reflects the hierarchical structure of the organization. For example, multiple managers might have multiple employees. It is recommended that you set up a new structure type for each distribution list that uses hierarchical processing.

You can use Work With Distribution lists to view all the distribution lists of which a child is a member.

Prerequisite

Before you complete the tasks in this section:

- Set up the address number of the distribution list in Address Book. Assign search type M (Mail Distribution List) to the distribution list when you add the distribution list to the Address Book.
- Make sure that all members that you want to include in the distribution list are entered into the address book.
- Set up a structure type using the User Defined Codes (P0004A) program. It is recommended that you set up a new structure type for each distribution list that uses hierarchical processing. Structure types are added to xx/xx.
- Understand the two ways in which distribution lists can be processed and decide which type of processing you want to use (group processing or hierarchical processing). This choice will determine how you will create the distribution list. See Distribution Lists in the JD Edwards EnterpriseOne Workflow Guide for more information.

Structure Types

Structure types are used to identify and categorize distribution lists. Every distribution list is identified by a unique address book number (the parent number for the distribution list) and a structure type. For example, you can set up a structure type of SAL for salary changes, and then set up a distribution list of employees involved in the salary change approval process.

You can use the predefined structure types of WFS, ORG, or EML to identify the distribution list as a JD Edwards EnterpriseOne Workflow group, an Organizational group, or email. However, you typically add your own structure types by adding to the xx/xx UDC values using the User Defined Codes program (P0004A).

Roles

In addition to assigning individual users to a distribution list, you can also assign one or more roles to a distribution list using group processing. In JD Edwards EnterpriseOne software, roles are assigned to groups of users that share similar tasks. When sending a JD Edwards EnterpriseOne Workflow message to a distribution list that includes a role, all users assigned to that role receive the message. Only one person in the role needs to act on the message in order for it to advance to the next group.

You can only assign a role to a distribution list used for group processing.

Note. For a distribution list using group processing, it is recommended that you use roles rather than individual address book numbers for members of the list. Roles are easier to maintain as people change positions within the enterprise.

Do not assign a role to a distribution list for hierarchical processing. If an individual in a role is included in more than one list of the same structure type, this inclusion can result in circular or ambiguous hierarchies that JD Edwards EnterpriseOne Workflow is unable to reconcile.

Distribution List Guidelines

Consider these guidelines when creating distribution lists:

- Do not include an individual in more than one list of the same structure type. A user cannot appear twice in one structure type if the list is used with hierarchical processing.
- Threshold values assigned to members of a group must be higher than the threshold values assigned to members of the next lower group. For example, the members of Group 2 must have higher threshold values than the highest threshold value in Group 1.
- Depending on how you set up distribution lists and threshold values, situations might arise for which an action message is not sent to any member of a distribution list. In these cases, the application developer, JD Edwards EnterpriseOne Workflow process designer, or both should take steps to ensure that a process instance completes successfully. Specifically, developers must code for the possibility that an action message is not sent and the approval code field in the additional data structure is not updated.

  Use one of these two options to enable a process to complete successfully, even when no action messages are sent:

- Make sure all additional data structure variables used to store action message results (the approve or reject response) are initialized with an appropriate default value. For example, use A for automatic approval and R for automatic rejection.
- Make sure that any conditional rule that evaluates action message response variables after the message task considers values other than A or R. For example, if the approval code variable is not initialized, the field may have a blank value (“ “) by default.

  See Chapter 11, “Understanding Distribution List Scenarios,” Distribution List Scenarios, page 81.

  See Chapter 5, “Creating a JD Edwards EnterpriseOne Workflow Process,” Adding Escalation Rules to an Action Task, page 44.

Creating a Distribution List for Group Processing

Access JD Edwards EnterpriseOne Workflow Tool.

1. From JD Edwards EnterpriseOne Workflow Management Setup (G0241), select Group Revisions (P02150). Alternatively, you can access this application from OMW by choosing a JD Edwards EnterpriseOne Workflow process, clicking Design, and then clicking Group Revisions on the JD Edwards EnterpriseOne Workflow Operations tab.
2. On Work With Distribution Lists, complete these fields:
   - Parent Number

     Click the Search button and then select the address book number of the distribution list to which you want to add members.
   - Structure Type

     Click the Search button and then select a structure type from the list.

   Note. Do not leave this field blank. Every distribution list must have a structure type. Blank is the value for the Accounts Receivable structure type.
3. From the Form menu, select Revise Parent.
4. On Address Parent/Child Revisions, complete these fields.
   - Group

     Enter a group number for each member. Group numbers must be sequential, starting with one.
   - Address Number

     Enter the address book number of the individual that you want to add to the distribution list.
5. If you will be using threshold values, complete these fields:
   - Associated Data Item

     You must use a data item that is also included in the additional data structure of the JD Edwards EnterpriseOne Workflow process. The system compares the value for this data item against the threshold values of the distribution list members to determine to whom messages are sent.
   - Threshold Value

     Enter the threshold value for each member of the distribution list.

   Important! If you want to make sure a message is sent, enter at least one threshold value in the distribution list that is lower than or equal to any value that could be entered into the associated data item. Otherwise, if the value in the associated data item is lower than the lowest threshold value in the distribution list, the process does not have anywhere to send the message because all of the possible recipients are out of the specified threshold range.
6. If you are adding escalation to an Action task, complete these fields to assign hours and minutes to each member of the distribution list.
   - Escalation Hours
   - Escalation Minutes

     These values determine when a message will be escalated.

   Note. Escalation hours and minutes must be the same for all members of a group. For example, if members 7101, 7102, 7103, and 7104 are all members of Group 1, then each of these members must have the same escalation hours and minutes.

7. If you want to specify a period of time during which the members of the distribution list can receive a message, complete these fields:
   - Begin Eff Date
   - End Eff Date

   The JD Edwards EnterpriseOne Workflow engine will not send messages to members of the distribution list unless the current date falls between the beginning effective date and the ending effective date that you specify in these fields.
8. Specify the routing options by choosing one or more of these options:
   - First Response
   - Higher Level Override
   - Authorization Required
9. Click OK.

Description	Glossary
Parent Number	The address book number of the parent company. The system uses this number to associate a particular address with a parent company or location. Any value that you enter in this field updates the Address Organizational Structure Master table (F0150) for the blank structure type. This address number must exist in the Address Book Master table (F0101) for validation purposes. Examples of address book records that would have a parent number include: Subsidiaries with parent companies Branches with a home office Job sites with a general contractor --- FORM SPECIFIC --- The Address Book number of the primary level in a hierarchy, or reporting relationship. A parent in one hierarchy can be a child in another hierarchy. A hierarchy can be organized by business unit, employee, or position. For example, you can create a hierarchy that shows the reporting relationships between employees and supervisors.
Structure Type	A UDC (01/TS) that identifies a type of organizational structure that has its own hierarchy in the Address Book system (for example, email). When you create a parent/child relationship for the Accounts Receivable system, the structure type must be blank. --- FORM SPECIFIC --- Identifies the type of distribution list, such as WFS for JD Edwards EnterpriseOne Workflow, ORG for group, and EML for email.

Description	Glossary
Associated Data Item	The data item used to retrieve the formatting information that the system uses on the Threshold Value.
Threshold Value	A value that is assigned to individuals within a distribution list to determine if the individuals will be included in the approval of a JD Edwards EnterpriseOne Workflow task. This value can be any numeric value, such as an amount, quality, or percentage.
First Response	If this option is turned on, only one member of a distribution list must respond to the JD Edwards EnterpriseOne Workflow message. When the first response is received by the JD Edwards EnterpriseOne Workflow system, the system cancels the messages that were sent to the other members of the group and marks the task as complete. If this option is turned off, all members of the group to which the JD Edwards EnterpriseOne Workflow message was sent must respond before the system marks the task as complete.
Higher Level Override	If this option is turned on and a person in a higher level group manually approves a JD Edwards EnterpriseOne Workflow transaction (by a workbench program), then all lower level groups will be marked as bypassed. If this option is turned off and a person in a higher level group manually approves the transaction, the action is logged and all lower level groups are still required to approve the transaction.
Authorization Required	If this option is turned on and a person in the distribution list enters a JD Edwards EnterpriseOne Workflow transaction that goes through the distribution list, the next higher person must be sent the message, even if the threshold has not been reached for the higher person. If this option is turned off, no higher person is required to see the message as long as it is below the threshold.

Creating a Distribution List for Hierarchical Processing

Access JD Edwards EnterpriseOne Workflow Tool.

1. From JD Edwards EnterpriseOne Workflow Management Setup (G0241), select Group Revisions (P02150). Alternatively, you can access this application from OMW by choosing a JD Edwards EnterpriseOne Workflow process, clicking Design, and then clicking Group Revisions on the JD Edwards EnterpriseOne Workflow Operations tab.
2. On Work With Distribution Lists, complete these fields:

- Parent Number

  Click the Search button and then select the address book number of the distribution list to which you want to add members.

- Structure Type

  Click the Search button and then select a structure type from the list.

  Note. Do not leave this field blank. Every distribution list must have a structure type. Blank is the value for the Accounts Receivable structure type.

3. From the Form menu, select Revise Parent.
4. On Address Parent/Child Revisions, complete these fields:

   - Group

     Hierarchical processing ignores values in the Group field. However, it is recommended that you assign each member to group 1.

   - Address Number

     Enter the address book number of the individual that you want to add to the distribution list.

5. If you will be using threshold values, complete these fields:

   - Associated Data Item

     You must use a data item that is also included in the additional data structure of the JD Edwards EnterpriseOne Workflow process. The system compares the value for this data item against the threshold values of the distribution list members to determine to whom message are sent.

   - Threshold Value

     Enter the threshold value for each member in the distribution list.

     Important! If you want to make sure a message is sent, enter at least one threshold value in the distribution list that is lower than or equal to any value that could be entered into the associated data item. Otherwise, if the value in the associated data item is lower than the lowest threshold value in the distribution list, the process does not have anywhere to send the message because all of the possible recipients are out of the specified threshold range.

6. If you are adding escalation to an Action task, complete these fields to assign hours and minutes to each member of the distribution list.

   - Escalation Hours
   - Escalation Minutes

     These values determine when a message will be escalated.

     Note. Escalation hours and minutes must be the same for all members of a group. For example, if members 7101, 7102, 7103, and 7104 are all members of group 1, then each of these members must have the same escalation hours and minutes.

7. If you want to specify a period of time during which the members of the distribution list can receive a message, complete these fields:

   - Begin Eff Date

- End Eff Date

  The JD Edwards EnterpriseOne Workflow engine will not send messages to the members of the distribution list unless the current date falls between the beginning effective date and the ending effective date that you specify in these fields.

8. Specify the routing options by choosing one or more of these options:
   - First Response
   - Higher Level Override
   - Authorization Required
9. Click OK.
10. To add a level beneath the member that you just added (for example, if you added a vice president and you want to add directors beneath the vice president), do the following:
11. Return to Work With Distribution Lists and select the vice president you just added in the tree.

    You might need to click Find to refresh the display.
12. Click Add, and then enter the directors.

    Each time you add another level to the distribution list, you select the parent address book number and then click Add to add children under that parent. You can also enter the parent's address book number and the structure type, click Find, and then select Revise parent from the Form menu.

Viewing the Distribution Lists of which a Child is a Member

Access JD Edwards EnterpriseOne Workflow Tool.

1. From JD Edwards EnterpriseOne Workflow Management Setup (G0241), select Group Revisions (P02150). Alternatively, you can access this application from OMW by choosing a JD Edwards EnterpriseOne Workflow process, clicking Design, and then clicking Group Revisions on the JD Edwards EnterpriseOne Workflow Operations tab.
2. On Work With Distribution Lists, complete these fields:
   - Parent Number

     Enter the address book number of the child for which you want to view all distribution lists.
   - Structure Type
3. Select the Parents option, and then click Find:

   The system displays the name of each distribution list of which the child is a member. In the following example, Dominique Abbot is a member of the Engineering and Accounts Receivable Department distribution lists.

Working with Recipient Conditions

This section provides an overview of recipient conditions, existing JD Edwards EnterpriseOne Workflow process, and describes how to:

- Add a recipient condition
- Modify the properties of a JD Edwards EnterpriseOne Workflow process
- Change the Properties of a Task
- Change the Properties of a Transition Condition from a JD Edwards EnterpriseOne Workflow Process
- Delete tasks and transitions
- Detach and delete transition conditions
- Replace a task

Understanding Recipient Conditions

A recipient condition contains a statement that JD Edwards EnterpriseOne Workflow evaluates to determine whether or not to route messages to a particular recipient. For example, you might set up a recipient condition named ACCTG that uses customer address book numbers as the criterion to determine where to send messages. You could add logic to the recipient condition to tell the system that if the customer number is equal to a range of 1 through 3001, and then send messages for those customers to the accounting department distribution list.

When you add a recipient condition in the JD Edwards EnterpriseOne Workflow Modeler, the recipient condition has no effect on the JD Edwards EnterpriseOne Workflow process until you attach it to a recipient rule. You can add a recipient condition to a recipient rule at any time when you are creating a JD Edwards EnterpriseOne Workflow process.

Example: Using Recipient Conditions

You have an accounting department distribution list and a payroll department distribution list, and you want messages to be sent to one or the other based on a rule. You set up a two recipient condition called IFACCTG and IFPAYR. These recipient conditions would use the address book numbers of the customers as the criteria for determining where to send messages. IFACCTG would specify that if the customer number is equal to a range of 1 through 3001, then messages regarding those customers should be sent to the accounting department's distribution list.

Working with Existing JD Edwards EnterpriseOne Workflow Processes

As your business processes change, you can change your JD Edwards EnterpriseOne Workflow processes accordingly. JD Edwards EnterpriseOne Workflow Modeler displays diagrams of the existing JD Edwards EnterpriseOne Workflow processes and enables you to modify them through the JD Edwards EnterpriseOne Workflow Modeler interface. You also can display JD Edwards EnterpriseOne Workflow processes that are shipped with JD Edwards EnterpriseOne software. You can customize existing JD Edwards EnterpriseOne Workflow processes to meet the needs of your business processes, rather than changing your business processes to conform to the software.

Occasionally, when you attempt to open an existing JD Edwards EnterpriseOne Workflow process, the system might detect that another instance of the JD Edwards EnterpriseOne Workflow process is running. The system will not enable you to edit a JD Edwards EnterpriseOne Workflow process with an active instance, although you can view a read-only version of the JD Edwards EnterpriseOne Workflow process. In most cases, you should copy the JD Edwards EnterpriseOne Workflow process version to a new version number, edit the new version, and then make the new version active. Doing so acts as a versioning mechanism during your JD Edwards EnterpriseOne Workflow development, enabling process instances that started using the old version to finish using that same version.

The system will open a read-only version of the JD Edwards EnterpriseOne Workflow process if any of these conditions are true:

- The version of the JD Edwards EnterpriseOne Workflow process is running or historical instance records for that version exist.

  Editing a JD Edwards EnterpriseOne Workflow process version introduces the possibility of invalidating historical data, which would prevent process instances from completing properly or prevent the accurate analysis of historical data. Therefore, you must run the Purge Completed Processes UBE (R98860P) before editing a process version. All active instances must be terminated before running this UBE to enable the historical data to be completely purged.

- The version of the JD Edwards EnterpriseOne Workflow process you are trying to edit is active.

  In Object Management Workbench, you must change the JD Edwards EnterpriseOne Workflow status to inactive before you can edit it.

- Someone else is editing the current JD Edwards EnterpriseOne Workflow process.

  If any version of the JD Edwards EnterpriseOne Workflow process is open for editing on another workstation, the system will not enable you to edit the process.

- The system crashed while the JD Edwards EnterpriseOne Workflow process in question was open for editing.

  In case of a system crash, the system enables you to open the JD Edwards EnterpriseOne Workflow process on which you were working in read-only mode, in a mode that preserves the data but does not preserve the formatting, or as it was in its previously saved version.

Prerequisite

Before you complete the tasks in this section:

- See Understanding JD Edwards EnterpriseOne Workflow Message Recipients in the JD Edwards EnterpriseOne Workflow Guide for information on how to use a combination of Address Book Number and Structure type to specify the recipient in the recipient rule.
- If it does not already exist, you must first create the recipient condition. See Recipient Conditions in the JD Edwards EnterpriseOne Workflow Guide.
- If you are attaching a distribution list to the recipient rule, you must first create the distribution list. See Setting Up Distribution Lists in the JD Edwards EnterpriseOne Workflow Guide.

Adding a Recipient Condition

Access JD Edwards EnterpriseOne Workflow Tool.

1. Right-click the background of the JD Edwards EnterpriseOne Workflow Modeler diagram, select Recipient Conditions, and then select Add.

2. On Process Rule Revisions, complete these fields:
   - Rule

     Type a name for the recipient condition. The name can be up to 10 characters in length.
   - Description

     Type a description for the purpose of the recipient condition.
   - Category Code 1
   - Category Code 2
   - Category Code 3

   Note. Category codes are optional fields that you can customize to include additional data about the object.
3. Click OK.
4. On Criteria Design, enter the criteria that will make up the recipient condition and click Save.

Modifying the Properties of a JD Edwards EnterpriseOne Workflow Process

JD Edwards EnterpriseOne Workflow Modeler enables you to change some of the properties of a task or a transition condition.

Access OMW.

1. On the Object Management Workbench form, select the JD Edwards EnterpriseOne Workflow process and then click the Design button in the center-column toolbar.
2. On JD Edwards EnterpriseOne Workflow Design, click the Summary tab.
3. On the Summary tab, you can modify this information:
   - Description
   - Product Code
   - History Tracking
4. If you want to use a different data structure for key data or additional data, click the Data tab and then click the Search button in either of these fields:
   - Key Data
   - Additional Data
5. Click the Category tab and complete the appropriate fields if you want to include any customizable data in the properties.
   - Category Code 1
   - Category Code 2
   - Category Code 3

   Note. You must first customize the category codes with descriptions and values using the User Defined Codes (P0004A) program.

6. If you want to include an attachment, click the Attachment tab. In the left panel, right-click, select New, and then select one of these types of attachments:
   - Text
   - Image
   - OLE
   - Shortcut
   - URL/File

   Note. Any attachment that you include does not transfer when moving the JD Edwards EnterpriseOne Workflow process from one environment to another.
7. Click OK.

Changing the Properties of a Task

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click a task and then click Properties.
2. On JD Edwards EnterpriseOne Workflow Task Revisions, you can change these items:
   - Description
   - Category Code 1
   - Category Code 2
   - Category Code 3
   - And Join (Y/N)
3. Click OK to return to the JD Edwards EnterpriseOne Workflow diagram in JD Edwards EnterpriseOne Workflow Modeler.

Changing the Properties of a Transition Condition

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click the transition.
2. From the pop-up menu, select Transition Conditions and then Properties.
3. On Process Rule Revisions, you can change these items:
   - Description
   - Category Code 1
   - Category Code 2
   - Category Code 3
4. Click OK to return to the JD Edwards EnterpriseOne Workflow diagram in JD Edwards EnterpriseOne Workflow Modeler.

Deleting Tasks and Transitions from a JD Edwards EnterpriseOne Workflow Process

When you delete a task from a JD Edwards EnterpriseOne Workflow process, any transitions that are attached to the task are deleted as well. Therefore, if you want to delete only the task, you should first move all transitions attached to the task to another location in the diagram.

When you delete a transition that was defined with a transition condition, the transition condition still exists in the system. You must delete this transition condition separately.

Access JD Edwards EnterpriseOne Workflow Modeler.

1. In JD Edwards EnterpriseOne Workflow Modeler, right-click the task or transition that you want to delete.
2. Click Delete.

Note. You cannot delete Start and End tasks.

Detaching Transition Conditions

When you detach a transition condition, you remove it from the transition, but the transition condition is still available for use in other transitions. When you delete a transition condition, the system removes that transition condition from the system and the transition condition no longer appears in the list of available transition conditions in the Transition Condition Search and Select form.

Note. Before you delete a transition condition, you must detach it from all transitions. If you delete a transition condition that is still attached to a transition, the name of the transition condition still appears next to the transition, giving the impression that it still exists in the JD Edwards EnterpriseOne Workflow process. However, the transition condition is no longer functional.

Access JD Edwards EnterpriseOne Workflow Modeler.

1. Right-click the transition from which you want to detach the transition condition.
2. From the pop-up menu, select Transition Conditions and then Detach.

   The system removes the transition condition from the transition, but the transition condition is still available for use in other transitions.

Deleting a Transition Condition

Access JD Edwards EnterpriseOne Workflow Modeler.

1. Right-click anywhere on the background of the JD Edwards EnterpriseOne Workflow process diagram.
2. From the pop-up menu, select Transition Conditions and then Delete.
3. On Transition Condition Search and Select, click the transition condition that you want to delete and then click Select.

   The system deletes the transition condition.

Replacing a Task

In JD Edwards EnterpriseOne Workflow Modeler, if you want to change the type of task that you are using in your process, you must first add a new task using the buttons in the toolbar. Move the transition lines from the task that you are replacing to your new task. You then can delete the old task.

CHAPTER 6

Working with JD Edwards EnterpriseOne Workflow Process Versions

This chapter provides an overview of JD Edwards EnterpriseOne Workflow process versions and discusses how to:

- Validate a JD Edwards EnterpriseOne Workflow process version.
- Attach a JD Edwards EnterpriseOne Workflow process to an application.

Understanding JD Edwards EnterpriseOne Workflow Process Version

After you use JD Edwards EnterpriseOne Workflow Modeler to create the tasks within the process and you add transition conditions and distribution lists, you must validate the JD Edwards EnterpriseOne Workflow process version. When validating a version, the system verifies that the version contains start and end points. It also verifies that all tasks that need event rules contain event rules, and that transitions exist among all the tasks.

You must make a version of a JD Edwards EnterpriseOne Workflow process active in the system before you can attach it to an application. Additionally, only one version of a JD Edwards EnterpriseOne Workflow process can be active at a time. This active version is the one that will be used if a JD Edwards EnterpriseOne Workflow process is started. However, once a process is started it will continue running with the version it started with, regardless of the status of that version.

You must validate a JD Edwards EnterpriseOne Workflow process version before you can activate it in the system. You cannot activate a process that contains errors.

Note. Once a JD Edwards EnterpriseOne Workflow process is made active in the system, or, if there are running instances of that JD Edwards EnterpriseOne Workflow, you cannot modify it.

Validating a JD Edwards EnterpriseOne Workflow Process Version

Access Object Management Workbench (OMW).

1. Find the JD Edwards EnterpriseOne Workflow process version that you want to validate in Object Management Workbench.
2. Move the JD Edwards EnterpriseOne Workflow process version to a project folder.
3. Click the JD Edwards EnterpriseOne Workflow process version and then click the Design button in the center column.

4. On JD Edwards EnterpriseOne Workflow Design, click the Design Tools tab and then click Validate JD Edwards EnterpriseOne Workflow.

   If the version contains no errors, the message JD Edwards EnterpriseOne Workflow is VALID appears. You can now attach the JD Edwards EnterpriseOne Workflow process version to an application.

5. If the version contains errors, a dialog box appears with a list of errors. Click Start JD Edwards EnterpriseOne Workflow Modeler to open the version in JD Edwards EnterpriseOne Workflow Modeler and correct the errors.

Attaching a JD Edwards EnterpriseOne Workflow Process to an Application

This section provides an overview of activating and attaching a JD Edwards EnterpriseOne Workflow process and describes how to:

- Attach the Start Process to an Application
- Attach a Message Form to an Application

Understanding How to Activate a JD Edwards EnterpriseOne Workflow Process Version

Only one version of a JD Edwards EnterpriseOne Workflow process can be active at a time. This active version is the one that will be used if a JD Edwards EnterpriseOne Workflow process is started. However, once a process is started it will continue running with the version it started with, regardless of the status of that version.

Note. Once a JD Edwards EnterpriseOne Workflow process is made active in the system, you cannot modify it. See Working with Existing JD Edwards EnterpriseOne Workflow Processes in the JD Edwards EnterpriseOne Workflow Guide for information on how to modify existing JD Edwards EnterpriseOne Workflow processes.

You cannot activate a process if it contains errors. Therefore, you must validate the JD Edwards EnterpriseOne Workflow process before you activate it.

Activating or Deactivating a JD Edwards EnterpriseOne Workflow Process Version

Access OMW.

1. Find the JD Edwards EnterpriseOne Workflow process version in Object Management Workbench.
2. Move the JD Edwards EnterpriseOne Workflow process version to a project folder.
3. Click the JD Edwards EnterpriseOne Workflow process version, and then click the Design button in the center column.
4. On JD Edwards EnterpriseOne Workflow Design, click the Design Tools tab and then click Change JD Edwards EnterpriseOne Workflow Status to toggle between inactive and active.

Understanding How to Attach a JD Edwards EnterpriseOne Workflow Process to an Application

After you create, validate, and activate a JD Edwards EnterpriseOne Workflow process, you attach it to an event within an application using Event Rules in Form Design Aid (FDA). You only need to define the system function Start Process in an application to attach a JD Edwards EnterpriseOne Workflow process. The Start Process system function invokes the tasks within the process.

You can also attach JD Edwards EnterpriseOne Workflow processes in Event Rules within Report Design Aid (RDA), Table Design Aid (TDA), or through named event rules (NER).

The following tasks explain how to attach the process called CREDLIMIT to an application and how to call a *pending approval* message that appears within the application when a user makes a change to a customer's credit limit. The example used is specific to the Credit Limit Revisions process; the way in which you attach your processes varies.

See Also

Chapter 9, "Understanding Message and JD Edwards EnterpriseOne Workflow System Functions," JD Edwards EnterpriseOne Workflow System Functions, page 77

JD Edwards EnterpriseOne Tools 8.97 Development Tools: Event Rules Guide, "Using Event Rules Design"

Prerequisite

Understand how to attach event rules to applications.

See *JD Edwards EnterpriseOne Tools 8.97 Development Tools: Event Rules Guide*.

Attaching the Start Process to an Application

Access OMW.

1. From the Object Management Workbench, find and check out the application to which you want to attach the JD Edwards EnterpriseOne Workflow process.
2. Click the Design button in the center column.
3. On Interactive Application Design, click the Design Tools tab.
4. Click Start Form Design Aid.
5. Find the form to which you want to attach the Start Process.
6. Open the event rules for the form, position the cursor where you want to add the Start Process, and click the System Function button.
7. On System Functions, click the Function Selection tab, double-click the JD Edwards EnterpriseOne Workflow folder, and then select Start Process.
8. Click the Parameter Mapping tab and double-click Choose Process.
9. On Process Search and Select, find the process that you want to attach to the application and click OK.

   The JD Edwards EnterpriseOne Workflow engine dynamically selects the active version of the process attached in Event Rules.

10. On System Functions, select the Key Data Structure data item, and double-click the Define Mapping object.
11. On Data Structure Mapping, map the Key Data Structure to the corresponding object in the Available Objects list.
12. Repeat steps 10 and 11 to map the Additional Data Structure, and then click OK.

Attaching a Message Form to an Application

You can attach a form interconnection event rule that calls a message form. For example, you might want the system to call a form that notifies a user that the requested changes are made and pending approval from others.

To attach a form interconnection:

1. On Event Rules, click the Form Interconnect button.
2. On Work With Applications, find and select the application that you want to use.
3. On Work With Forms, select the form that you want to use.
4. On Form Interconnections, map the appropriate parameters, if applicable.

   In the Credit Limit Revisions example, the form that is called when a user makes a change to a customer's credit limit is for informational purposes only; you do not need to pass any values to this form.

CHAPTER 7

Understanding Synchronous and Asynchronous Processing

This chapter discusses:

- Synchronous and Asynchronous Processing
- System Functions for Synchronous and Asynchronous Processing
- Transaction Processing

Synchronous and Asynchronous Processing

JD Edwards EnterpriseOne Workflow can execute a JD Edwards EnterpriseOne Workflow process either synchronously or asynchronously. Asynchronous processing enables various JD Edwards EnterpriseOne Workflow processes to run at the same time. By starting a JD Edwards EnterpriseOne Workflow process asynchronously, you are simply running the JD Edwards EnterpriseOne Workflow in the background of the calling application.

Although asynchronous JD Edwards EnterpriseOne Workflow processes might process faster, synchronous processing is sometimes preferred. If a calling application depends on information from the JD Edwards EnterpriseOne Workflow process, you should run the JD Edwards EnterpriseOne Workflow process synchronously to ensure that the calling application gets the information it needs from the JD Edwards EnterpriseOne Workflow process before the JD Edwards EnterpriseOne Workflow finishes and the application closes.

A JD Edwards EnterpriseOne Workflow process runs asynchronously by default, with these exceptions:

- When it is run from a batch application
- When the JD Edwards EnterpriseOne Workflow process is specifically designed to run synchronously

In the first two cases, the system forces the JD Edwards EnterpriseOne Workflow to run synchronously. In the third case, the designer specifically selects for the JD Edwards EnterpriseOne Workflow to run synchronously.

System Functions for Synchronous and Asynchronous Processing

You can use the system functions *Start Process* and *Complete Activity* for asynchronous processing. You can use the system functions *Start Process In Line* and *Complete Activity In Line* for synchronous processing.

If an application depends on a JD Edwards EnterpriseOne Workflow process to complete before continuing with subsequent event rule logic, then you must use *Start Process In Line*.

The *Start Process* and *Complete Activity* system functions run asynchronously in interactive applications, named event rules (NER), and table event rules (TER).

The *Start Process In Line* and *Complete Activity In Line* system functions run synchronously in interactive applications, named event rules (NER), and table event rules (TER).

JD Edwards EnterpriseOne Workflow processes in batch applications and subprocess tasks within a JD Edwards EnterpriseOne Workflow always run synchronously, so only the *Start Process In Line* and *Complete Activity In Line* system functions are available in Report Design Aid and subprocess task definition. All event rules for existing batch applications that call *Start Process* and *Complete Activity* continue to be displayed as they are, but the JD Edwards EnterpriseOne Workflow processes run synchronously.

Several system functions for JD Edwards EnterpriseOne Workflow processing are available. Refer to the online APIs for more information about specific system functions.

Transaction Processing

If a named event rule that is included in a transaction calls any JD Edwards EnterpriseOne Workflow system function, regardless of whether the JD Edwards EnterpriseOne Workflow processes are synchronous or asynchronous, the JD Edwards EnterpriseOne Workflow process is not included in the transaction. Therefore, the JD Edwards EnterpriseOne Workflow process is permanently written to the tables even if the transaction rolls back.

CHAPTER 8

JD Edwards EnterpriseOne Workflow Processing Location

This chapter provides overviews of troubleshooting JD Edwards EnterpriseOne Workflow environment issues and discusses how to run the JD Edwards EnterpriseOne Workflow Environmental Diagnostic tool.

Understanding JD Edwards EnterpriseOne Workflow Processing Location

JD Edwards EnterpriseOne Workflow can run either on the client or the server. The location for JD Edwards EnterpriseOne Workflow processing is determined by the default Object Configuration Manager mapping for business functions. An exception is that when the logon environment is local, the JD Edwards EnterpriseOne Workflow must run locally; this is because, in this case, the server cannot write to or update a database on a client workstation.

Troubleshooting JD Edwards EnterpriseOne Workflow Environmental Issues

The JD Edwards EnterpriseOne Workflow Environmental Diagnostic (W98895A) application (hereafter called Diagnostic Tool) is a tool that enables you to troubleshoot issues that may affect how your JD Edwards EnterpriseOne Workflow processes run on Windows client or enterprise server machines. The Diagnostic Tool detects environmental setup issues that can cause your JD Edwards EnterpriseOne Workflow processes to fail, such as incorrect OCM mappings and database settings.

In addition to checking the JD Edwards EnterpriseOne Workflow system for environmental setup errors, the Diagnostic Tool gives you the option to perform these operations:

- Troubleshoot an active version of a JD Edwards EnterpriseOne Workflow process.

  If no active version is found, the tool will continue to check the other environmental settings.

- Verify SMTP settings for message delivery

You can run the Diagnostic Tool on the client workstation, the enterprise server, or both. When you run the tool over both the client and server, the tool compares the data source of each JD Edwards EnterpriseOne Workflow table between the client and server for any discrepancies. It also detects any discrepancies between the JAS configuration settings on the client and server.

The Diagnostic Tool performs these validations:

- Validates accessibility to the following JD Edwards EnterpriseOne Workflow tables:

F98800	F98865
F98810	F98870
F98811	F98840
F98820	F0150 (Distribution List)
F98830	F0101 (Address Book)
F98845	F0111 (Address Book)
F98850	F01131 (PPAT)
F98860	F01133 (PPAT)
F98861	F01131M (PPAT)

- Validates that the following tables are mapped to the same data source:

  JD Edwards EnterpriseOne Workflow definition tables: F98800, F98810, F98811, F98820, F98830, F98845, F98850

  JD Edwards EnterpriseOne Workflow instance tables: F98860, F98861, F98865, F98870

  Distribution list tables: F0150, F98840

- Validates that the following media objects and corresponding database tables are mapped to the same data source:

  GT98800A, F98800

  GT98865A, F98865

  GT01131, F01131

- Validates the table format for the current release

  Verifies that all JD Edwards EnterpriseOne Workflow tables have the valid number of columns in the current release, both in the physical database, as well as the Enterprise One Table Specifications.

  Verifies that the F98840 table contains three columns in the primary index.

- Validates the Binary LOB flag setting for an AS/400 data source

  Verifies that JD Edwards EnterpriseOne Workflow tables have been correctly set up to have a LOB setting instead of the former AS/400 chaining solution. This test is performed only for tables containing a Binary LOB mapped to an AS/400 data source.

- Validates a JD Edwards EnterpriseOne Workflow process (optional)

  Validates a selected JD Edwards EnterpriseOne Workflow process or an active version of that process.

  Returns the number of awaiting instances of a process.

  Checks to see if the sequence numbers are out of sync between the JD Edwards EnterpriseOne Workflow definition tables and the number of instances.

- Validates template substitution

Verifies that the alpha description and glossary for message template LM0033 exists and that text substitution can be performed. Template LM0033 is used as an example to verify that data dictionary specifications are accessible.

- Validates access to JD Edwards EnterpriseOne Workflow specs (F98811)

  Uses spec encapsulation APIs to access a F98811 JD Edwards EnterpriseOne Workflow spec record.

- Validates SMTP setup (optional)

  Verifies that sending an email to a specified email address works.

- Validates JAS Configuration

  Retrieves the JAS configuration from the Install Planner tables (in JD Edwards EnterpriseOne 9.0 and successive releases).

- Validates Kernel configuration (only on server)

  Checks the server jde.ini to verify that there is one valid JD Edwards EnterpriseOne Workflow kernel definition.

  Checks the dispatchDLLName and dispatchDLLFunction in the server jde.ini file to see if it matches the settings for the specific supported platform.

Interpreting the Results

This section provides an overview for interpreting the results and describes how to run the JD Edwards EnterpriseOne Workflow Environmental Diagnostic tool.

Interpreting the Results

The JD Edwards EnterpriseOne Workflow Environmental Diagnostic tool generates a report listing the various errors or issues that the tool detects. You can print the report or email the report to another user.

These are examples of how some of the errors appear on the report. You should work with your system administrator to help interpret and resolve any issues that the Diagnostic Tool detects.

- Table access error

```
Error:JDB_OpenTable failed. Possible Reason could be missing or damaged specs for⇒
 the table.Cannot determine whether table is missing or empty.Empty TableJDB_Close⇒
Table failed.Warning:Empty TableFailed to access table
```

- Data source consistency

```
Error / Warning:Data Source inconsistency.
```

- Table format

```
Error:Expected no. of columns for current release is <n>. Wrong specs found for⇒
 table.The Primary Index<ID_F98840_ORGANIZATIONAL_MODEL> for table F98840 has 3⇒
 columns. No. of colu mns in the specs for this Index is <n>.
```

Running the JD Edwards EnterpriseOne Workflow Environmental Diagnostic Tool

Access the JD Edwards EnterpriseOne Workflow Environmental Diagnostic tool from the JD Edwards EnterpriseOne Workflow Advanced and Technical Operations menu.

1. On JD Edwards EnterpriseOne Workflow Environmental Diagnostic, select one of these options:
   - Windows Client Only

     Performs all validations except the Kernel validation.
   - Enterprise Server Only

     Performs all validations.
   - Both Client and Server (includes comparison)

     Checks the data source of each JD Edwards EnterpriseOne Workflow table between the client and server for any discrepancies, and detects discrepancies between the JAS configuration settings.
2. If you want to validate a particular JD Edwards EnterpriseOne Workflow process, enter the process name and version in these fields:
   - JD Edwards EnterpriseOne Workflow Process to Validate
   - Process Version to Validate (or 0 for Active Version)
3. To verify that the messaging system is properly set up, in the Mail Test (optional) area, enter an email address in the Email Address field.

   After you run the Diagnostic Tool, if a message is sent to the specified email address, then the messaging system settings are correct.
4. Click Run Diagnostic

   The Diagnostic Tool validates the environmental settings and performs any additional tasks that you specified. After the test is complete, the Diagnostic Tool generates a report that appears in the JD Edwards EnterpriseOne Workflow Environmental Diagnostic Output form.

   On JD Edwards EnterpriseOne Workflow Environmental Diagnostic Output, you can copy and paste the report to any text editor or you can email the report to a user's address book number or to an email address.
5. To email the report, complete the Send To (Address Book Number or Email Address) field and then click Send.

CHAPTER 9

Understanding Message and JD Edwards EnterpriseOne Workflow System Functions

Following are the available Message and JD Edwards EnterpriseOne Workflow system functions and a description of each. Refer to the system function documentation in the online API guide for more information about these system functions.

Note. JD Edwards EnterpriseOne Workflow Admin system functions are intended only for use by JD Edwards EnterpriseOne Workflow administrative applications developed and maintained by JD Edwards. Therefore, they are not listed here.

Message System Functions

Message system functions include the following:

Delete Message	Removes a message that was created using Send Message.
Forward Message	Automatically forwards a message using a system function.
Send Message	Sends a message through the JD Edwards EnterpriseOne mail system.
Template Substitution	Enables the user to fill the message template with the substitution values and then receive the completed message template back in a text string. The output string can be displayed on the screen or printed on a report as generic text.

JD Edwards EnterpriseOne Workflow System Functions

JD Edwards EnterpriseOne Workflow system functions include the following:

Complete Activity	Completes a task instance resumes in JD Edwards EnterpriseOne Workflow process.
Complete Activity In Line	Completes an task instance and resumes the JD Edwards EnterpriseOne Workflow process in line

Get Activity Instance For Key	Retrieves the active JD Edwards EnterpriseOne Workflow task instance information for a given key
Get Process Instance Attributes	Retrieves the key and attribute data structures for a given process instance
Get Process Instance For Key	Retrieves the JD Edwards EnterpriseOne Workflow process instance for a given key
Start Composer Process	Obsolete
Start Process	Starts a JD Edwards EnterpriseOne Workflow process
Start Process In Line	Starts a JD Edwards EnterpriseOne Workflow process in line for synchronous processing
Update Process Instance Attributes	Updates the attributes for a given process instance
Update Process Instance Attribute Single	Updates a single process attribute for a given process instance

CHAPTER 10

Configuring Shortcuts

This chapter provides an overview of shortcuts and discusses how to configure them.

Understanding How to Configure Shortcuts

While working in JD Edwards EnterpriseOne, users can email other users a shortcut to an application or form. More often, shortcuts are sent to recipients automatically as part of a JD Edwards EnterpriseOne Workflow process. For example, a JD Edwards EnterpriseOne Workflow process might automatically send a manager a shortcut to an approval application after a user enters a sales order. The recipient (in this example, the manager) double-clicks the shortcut to access the corresponding application.

If more than one server is dedicated to JD Edwards EnterpriseOne Workflow tasks, you can configure to which server a shortcut is routed. For example, a user is developing a JD Edwards EnterpriseOne Workflow process. The JD Edwards EnterpriseOne Workflow process contains a shortcut to a new application that resides only on the user's workstation. The user wants to test the new application before making it available to everyone, so she wants the shortcut to access the new application located on her workstation. By default, the shortcut sent by the JD Edwards EnterpriseOne Workflow process routes users to a deployment server, not to the user's workstation. You can configure EnterpriseOne to route shortcuts to any server (in this example, the user's workstation).

Note. Shortcut configurations are specific to a JD Edwards EnterpriseOne user or JD Edwards EnterpriseOne role. When a user creates a shortcut, JD Edwards EnterpriseOne verifies that a specific configuration exists for the user. If a configuration is specified for the user, then the shortcut is routed to the server named in that configuration. If a configuration is not found for the user, JD Edwards EnterpriseOne finds all the roles the user logged in as and then searches for a configuration that is assigned to one of those roles. If a configuration is specified for a role the user has used, then the shortcut is routed to the server named in the configuration. If a configuration is not found for the role, then JD Edwards EnterpriseOne routes the shortcut to the default server listed in the jde.ini file.

When you configure the shortcut to access a server other than the default server, your changes are stored in the F986101 table (OCM) located on a server you specify when you create the configuration. If you do not create a configuration, then JD Edwards EnterpriseOne, after checking the F986101 table, routes the shortcut to the server specified in the jde.ini file located on the recipient's server.

Your configurations are stored as records, and six record types exist. When a user sends a shortcut, JD Edwards EnterpriseOne first searches for and uses the most specific record type. JD Edwards EnterpriseOne eliminates each record type if it is not found, and then progresses to the next, less specific record type. Records are comprised of the user or role, and the service. This list shows the different combinations that comprise the record types. They are listed from most specific to least specific.

- specific user, specific service
- role, specific service
- user, default service

- role, default service
- *public, specific service
- *public, specific service

Configuring a Shortcut

Access Environment/Service Configuration.

1. Use the EntepriseOne menus to navigate to the Environment/Service Configuration (GH9053) menu. Double-click Environment/Service Configuration. You cannot use the Fast Path to navigate to this application.
2. On Environment/Service Configuration, select the OCM table you want to update.

   The OCM table is the table to which you add or modify JD Edwards EnterpriseOne Workflow records. The OCM table that you select in this step is the one that is affected when you configure shortcut mapping.
3. Click Select.
4. On Environment/Server Configuration - [Work with Service Configuration], click Add.

   When you add a record to the OCM table, you cannot modify it.
5. On Environment/Server Configuration - [Service Configuration Revisions], complete these fields:
   - Environment

     The environment on which the user sending the shortcut is logged in.
   - Service Name
   - User/Role

     The user who is sending the shortcut.
   - Server

     The logical server name of the web server on which the user sending the shortcut is logged in. You must enter a logical web server name rather than the physical server name. The logical server name is a shortcut to the server, and is set up in the deployment location tables. The physical server name is the actual path to the server specified on the deployment server. Do not enter the physical server name.
   - Port Number

     The port number associated with the logical server. The port number you enter will help identify the physical server name on the deployment server.
6. Click OK.

See Also

Deployment Server Installation in the JD Edwards EnterpriseOne Application Installation Guide

CHAPTER 11

Understanding Distribution List Scenarios

This chapter discusses:

- Distribution List Scenarios
- Group processing scenarios
- Hierarchical processing scenarios

Distribution List Scenarios

There are several scenarios that illustrate how JD Edwards EnterpriseOne Workflow processes use group processing or hierarchical processing to send messages to distribution lists. These scenarios follow the same Credit Limit example that is used throughout this guide. Each scenario includes the setup used for a specific JD Edwards EnterpriseOne Workflow process and the results that occur when that setup is used.

Prerequisite

You should understand how to create an Information or Action task and how to attach a distribution list to an Information and Action task. You should also understand the difference between group processing and hierarchical processing.

For more information, see these topics in the JD Edwards EnterpriseOne Workflow Guide:

- Creating a JD Edwards EnterpriseOne Workflow Process
- Message Tasks
- Distribution Lists

Group Processing Scenarios

This section discusses examples that illustrate how a JD Edwards EnterpriseOne Workflow process uses group processing to route messages to members of a distribution list.

Scenario 1: Group Processing

This scenario illustrates how group processing sends messages to members of a distribution list.

Setup

The following information illustrates a typical distribution list setup for the Credit Limit example.

A/B #	Description	Group #	Threshold Value
7101	Clerk #1	1	5000
7102	Clerk #2	1	5000
7103	Clerk #3	1	10000
7201	Manager #1	2	10000
7202	Manager #2	2	15000
7203	Manager #3	2	20000
7301	Director #1	3	20000
7302	Director #2	3	25000
7303	Director #3	3	25000
7401	VP #1	4	30000
7402	VP #2	4	30000
7501	President	5	31000

Results

The following results illustrate to which A/B numbers that messages would be passed. The value passed is the dollar amount used to determine which address book numbers receive the message. The address book numbers to the right are the result.

Value Passed												
4500	Not sent to list											
9500	7101	7102										
14500	7101	7102	7103	7201								
19500	7101	7102	7103	7201	7202							
24500	7101	7102	7103	7201	7202	7203	7301					
29500	7101	7102	7103	7201	7202	7203	7301	7302	7303			

Value Passed												
30500	7101	7102	7103	7201	7202	7203	7301	7302	7303	7401	7402	
31500	7101	7102	7103	7201	7202	7203	7301	7302	7303	7401	7402	7501

Scenario 2: Group Processing

This scenario uses the same setup as Scenario 1 except that all threshold values are 0.

Setup

A/B #	Description	Group #	Threshold Value
7101	Clerk #1	1	0
7102	Clerk #2	1	0
7103	Clerk #3	1	0
7201	Manager #1	2	0
7202	Manager #2	2	0
7203	Manager #3	2	0
7301	Director #1	3	0
7302	Director #2	3	0
7303	Director #3	3	0
7401	VP #1	4	0
7402	VP #2	4	0
7501	President	5	0

Results

No matter what value is passed, the process goes through the entire distribution structure. Every address book number gets a message.

Scenario 3: Group Processing

In this scenario of group processing, all members are in the same group and have the same threshold values.

Setup

Each group level in the distribution list is set to 1. A threshold value of 100 is used for each person.

Group	Name	Threshold Value
1	Tom	100
1	Barb	100
1	Tim	100
1	Dan	100

Results

Every address book number is given a message if the amount sent is greater than the threshold.

Data Value	Sent to All #s in Group
90	Did Not Send
110	Yes

Scenario 4: Group Processing with Higher Level Overrides

This scenario shows how group processing routes messages to a distribution list with threshold values and higher level overrides.

Setup

The value passed in is 31500.

A/B #	Description	Group #	Threshold Value
7101	Clerk #1	1	5000
7102	Clerk #2	1	5000
7103	Clerk #3	1	10000
7201	Manager #1	2	10000
7202	Manager #2	2	15000
7203	Manager #3	2	20000
7301	Director #1	3	20000
7302	Director #2	3	25000
7303	Director #3	3	25000
7401	VP 1	4	30000
7402	VP 2	4	30000
7501	President	5	31000

Results

After Group #1 approves the message, all address book numbers above Group #1 show up in Process Task Monitor in an awaiting status except for Manager #1 and Manager #2, which show an unopened status.

At this point, a user of higher group number can come in and override the JD Edwards EnterpriseOne Workflow process to continue to the next task. For example, in this scenario, if you log on to the JD Edwards EnterpriseOne system as President and do a higher level override on Clerk #1, all users display as bypassed, and the process ends as expected.

Scenario 5: Group Processing with First Response

This scenario uses the same setup as Scenario 1. It uses group processing and the originator of the process is not included in the distribution list. This scenario shows what would happen if the First Response option was checked during the distribution list setup.

Setup

A/B #	Description	Group #	Threshold Value
7101	Clerk #1	1	5000
7102	Clerk #2	1	5000
7103	Clerk #3	1	10000
7201	Manager #1	2	10000
7202	Manager #2	2	15000
7203	Manager #3	2	20000
7301	Director #1	3	20000
7302	Director #2	3	25000
7303	Director #3	3	25000
7401	VP #1	4	30000
7402	VP #2	4	30000
7501	President	5	31000

Results

At a specific group level, the first individual to respond dictates how the process continues. For example, the response might tell the process to end the task or to move on to the next higher group level in the distribution list.

Note. The First Response option is not necessary when using hierarchical processing of distribution lists. In hierarchical processing, if you have a situation where a clerk has two managers directly above him or her, both managers receive the message. The first manager to respond dictates how the process proceeds.

Hierarchical Processing Scenarios

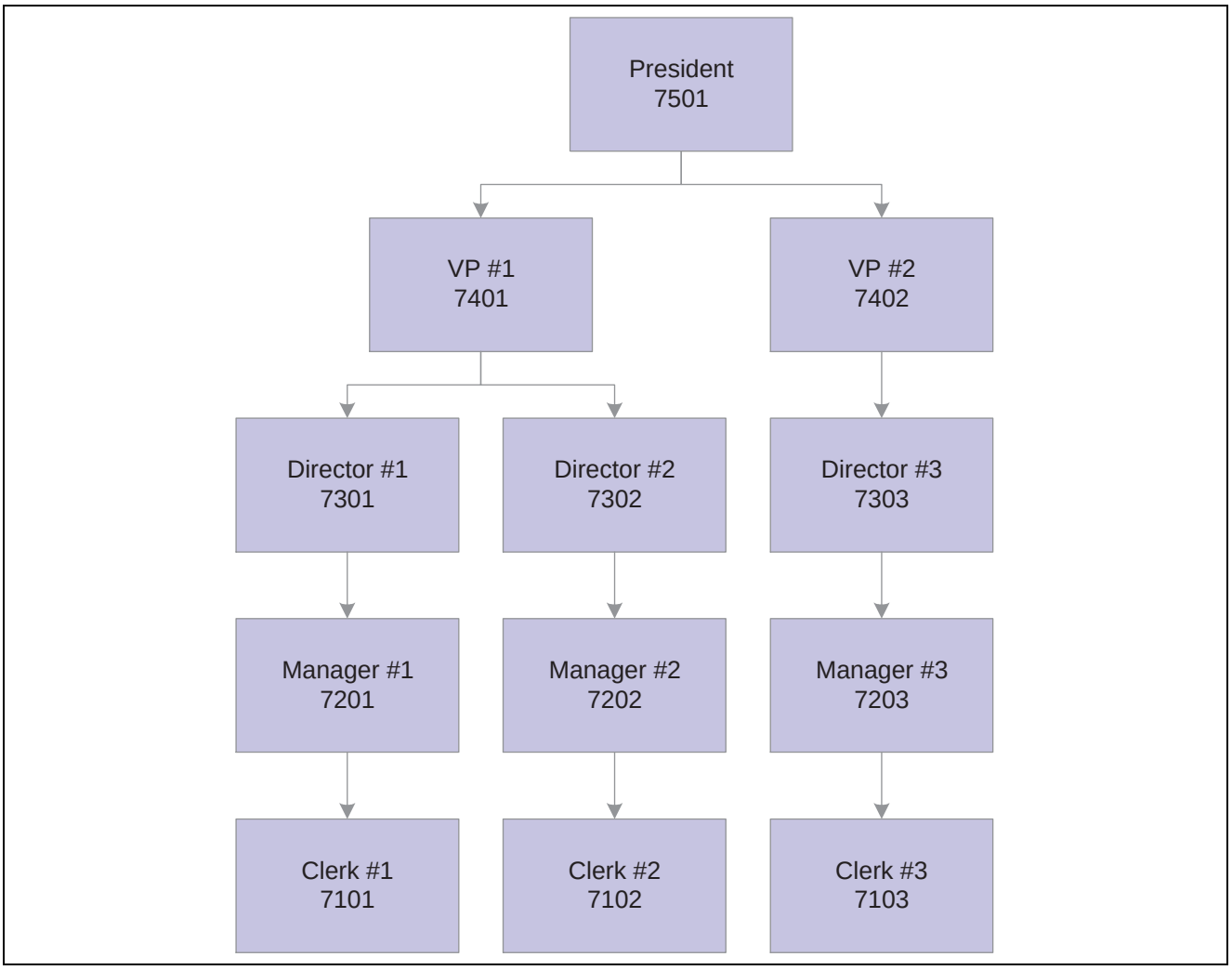
This section discusses hierarchical processing scenarios.

Scenario 6: Hierarchical Processing

This scenario illustrates how hierarchical processing of a distribution list sends messages to members of a distribution list with threshold values. The originator is in the distribution list. If the originator is not in the distribution list, the JD Edwards EnterpriseOne Workflow process ends in error.

Setup

Threshold values are denoted in parentheses. The originator is 7101.



Setup for Distribution List

Results

If the value passed is lower than the originator's threshold or the originator's manager's threshold, the JD Edwards EnterpriseOne Workflow will not send the message. To prevent this situation, set a default value for the messages that are not sent. For the Credit Limit scenario, you would probably accept the value passed amount because it is not a significant amount.

Value Passed				
4500	Not sent to list			
9500	Not sent to list			
14500	7201			
19500	7201			
24500	7201	7301		
29500	7201	7301		

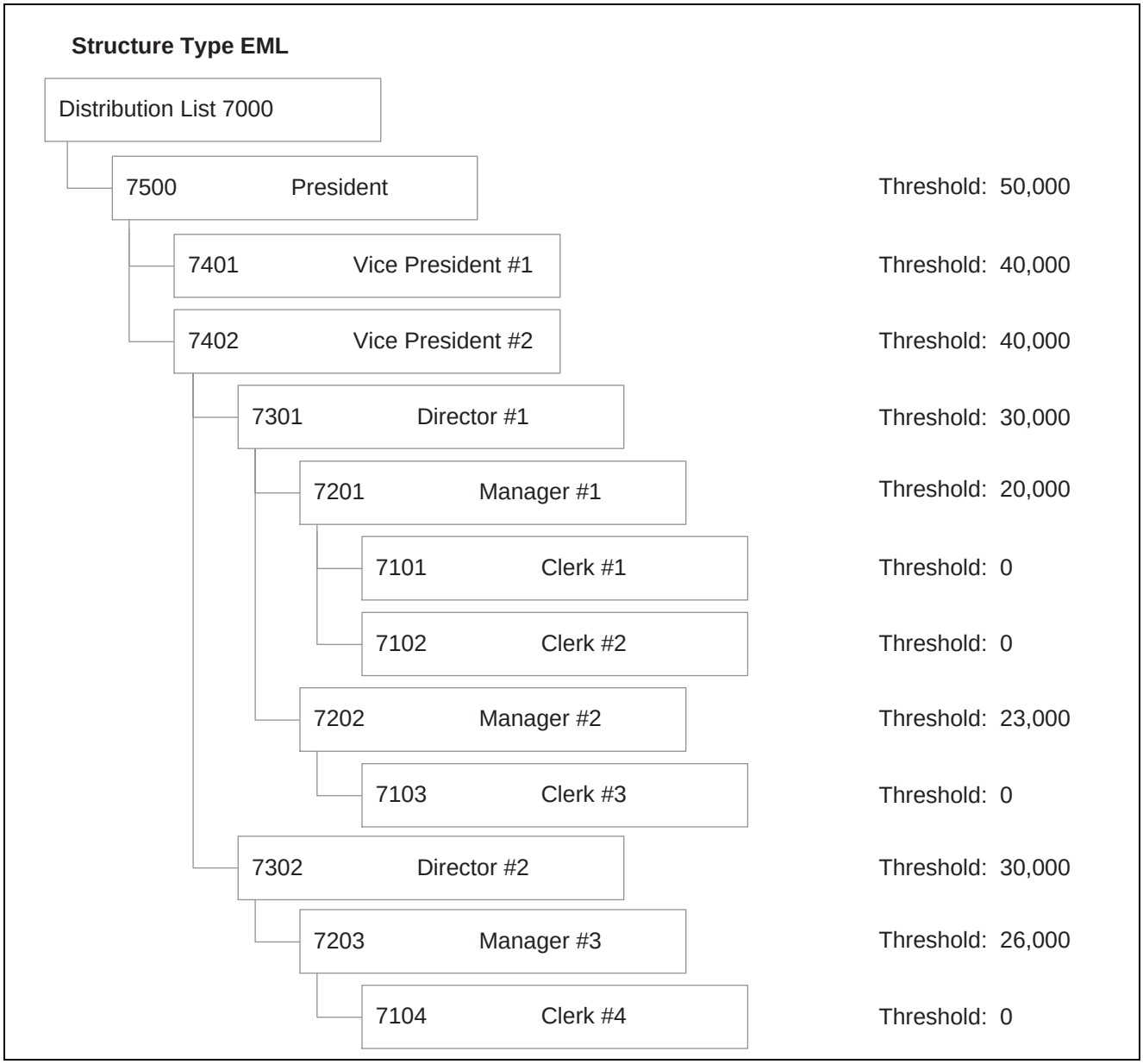
Value Passed				
30500	7201	7301	7401	
31500	7201	7301	7401	7501

Scenario 7: Hierarchical Processing

This scenario illustrates how hierarchical processing routes messages to a distribution list with threshold values all set to 0. The originator is in the distribution list.

Setup

The originator is Clerk #1.



Distribution List Setup

Results

Since there are no threshold values, the JD Edwards EnterpriseOne Workflow process sends a message to all of the members.

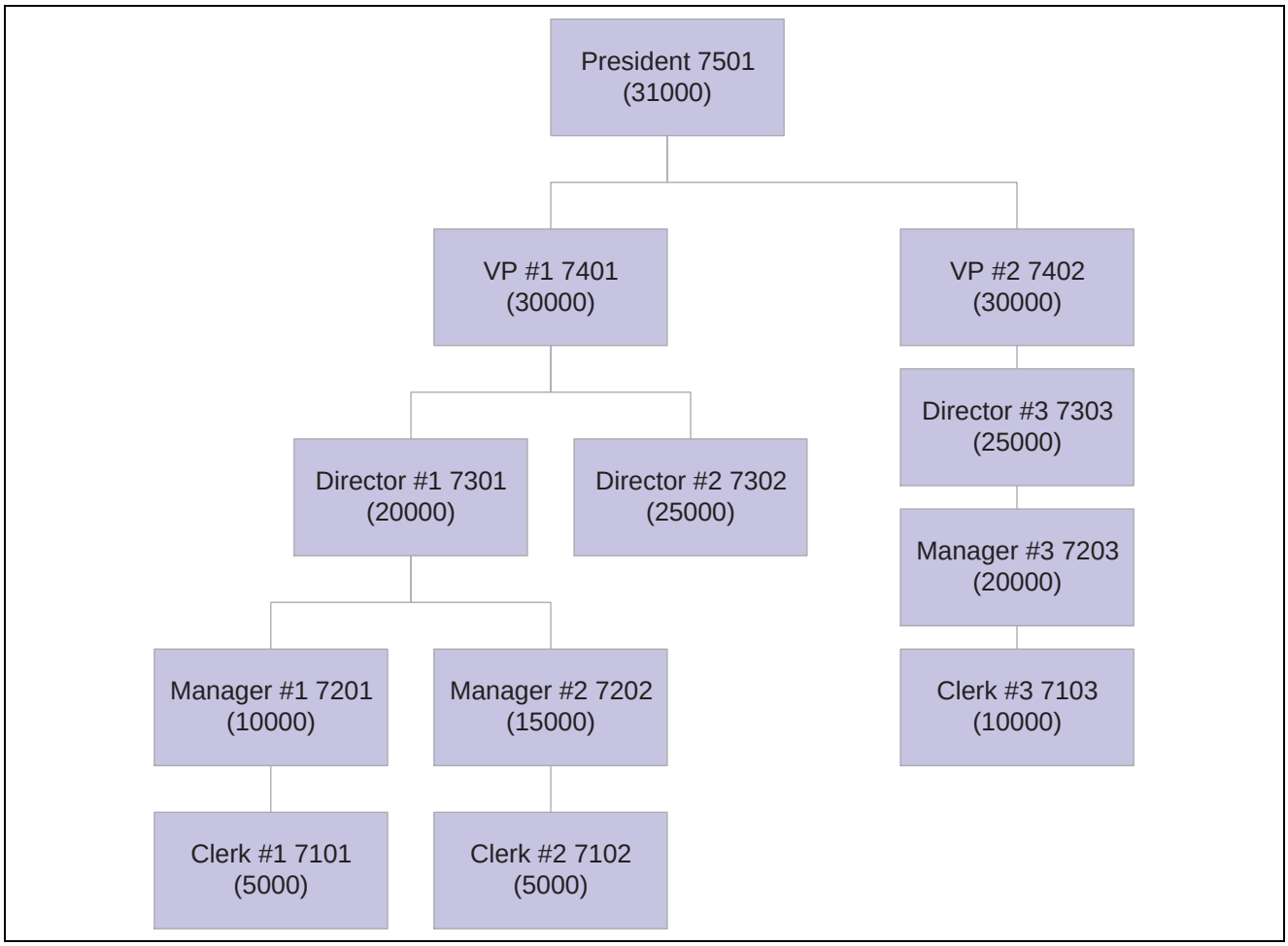
Value Passed				
4500	7201	7301	7401	7501
9500	7201	7301	7401	7501
14500	7201	7301	7401	7501
19500	7201	7301	7401	7501
24500	7201	7301	7401	7501
29500	7201	7301	7401	7501
30500	7201	7301	7401	7501
31500	7201	7301	7401	7501

Scenario 8: Hierarchical Processing with Higher Level Overrides

This scenario demonstrates higher level overrides in a distribution list with threshold values. The originator is in the distribution list.

Setup

Threshold values are in parentheses. The originator is Clerk #1. The value passed in by the JD Edwards EnterpriseOne Workflow is 31500.



Hierarchical Processing with Higher Level Overrides

Results

When the message is first sent, all address book numbers show up in the Process Task Monitor in an awaiting status except for Manager #1, which shows in an unopened status.

At this point, a user of higher group number can override the JD Edwards EnterpriseOne Workflow process to continue to the next task. For example, in this scenario, if you sign into the JD Edwards EnterpriseOne system as President and do a higher level override on Manager #1, all users display as bypassed, and the process ends as expected.

CHAPTER 12

Administrative Tasks

This chapter provides an overview of administrative tasks and describes how to:

- Monitor Process Tasks
- Change Queue Security
- Activate the Escalation Monitor
- Analyze JD Edwards EnterpriseOne Workflow Processes
- Print Process Instance Reports
- Purge JD Edwards EnterpriseOne Workflow Data Files
- Transfer JD Edwards EnterpriseOne Workflow Processes

Understanding Administrative Tasks

JD Edwards EnterpriseOne Workflow allows you to complete administrative tasks such as monitoring an individual employee's queues or all the queues for each group within your organization. You can also analyze processes for improvement analysis, activate the escalation monitor, and transfer process data to another data environment. You can monitor Accounts Receivable queues and Purchasing queues using the JD Edwards EnterpriseOne Workflow Management Setup menu (G0241). If necessary, you can add menu items that access other queues. For example, you can add a menu item to JD Edwards EnterpriseOne Workflow Management Setup that invokes Shop Floor Control queues.

Monitoring Process Tasks

This section provides an overview of process task monitor and describes how to:

- Review a Process Status
- Terminate, Suspend, or Resume an Instance of a Process
- Review Attachments to a Task
- Override the Message Approval Process

Understanding Process Task Monitor

You use the Process Task Monitor to monitor the process flow in the JD Edwards EnterpriseOne Workflow system and to retrieve audit data for process improvement analysis. You can also terminate, suspend, resume, or override instances of a process. The Process Task Monitor lists all of the tasks that apply to the process and the status of each task; for example, whether the task is complete or active. You can also review the resource (or employee) assigned to that task, the start and end time of each task, and the time and date that a task expired. Furthermore, you can review what was attached to messages when acted upon. If you designed your JD Edwards EnterpriseOne Workflow process to enable higher-level overrides, you can override the message approval process for messages that have not been answered by a lower-level recipient. The Process Task Monitor also shows back-to-back processes (that is, processes that contain the same process keys). Back-to-back processes can be in the queue until the first one is completed. For example, several credit limit change requests can be waiting to be accepted or rejected for the same primary key. These requests show a status of Awaiting until the first one is accepted or rejected. You can also monitor processes graphically using the Process Modeler Server (sold separately). This product provides an HTML view of JD Edwards EnterpriseOne Workflow process instances within the JD Edwards EnterpriseOne Portal and provides JD Edwards EnterpriseOne Workflow administrators the ability to suspend, terminate, or resume any JD Edwards EnterpriseOne Workflow process instance.

Review a Process Status

You review a process status to see if tasks have been acted upon and to retrieve audit data.

Terminate, Suspend, or Resume an Instance of a Process

You might want to terminate an instance of a process if it contains errors or if the process cannot continue, such as when an employee has not yet answered his or her messages because of vacation or termination. In this case, subsequent requests for the same process queue behind the original request. Terminating the process in error allows the subsequent requests to begin processing. You might want to suspend an instance of a process if you want other processes to finish before a certain process. You can also restart a suspended instance of a process.

Review Attachments to a Task

You can review attachments associated with a task. For example, if a recipient approves a message, and then adds additional text to that message and sends it, you can view that message text through an attachment from the Process Task Monitor.

Overriding the Message Approval Process

You might want to override the message approval process if a message has not been answered by a recipient in a lower level. For example, if a clerk has not approved or rejected a message and the manager wants the message to be approved to move it to the next level, the manager can override the approval process in the Process Task Monitor and approve or reject the message. The manager can only override the message approval process for messages sent to a distribution list that includes higher-level overrides. The Overrides option is enabled if all of these conditions are met:

- You exist in the address book.
- You are a member of a higher-level group than the recipient for whom the message was intended.
- The message is unopened.
- The message has an active shortcut.

Reviewing a Process Status

To review a process status:

1. On JD Edwards EnterpriseOne Workflow Advanced & Technical Operations (G0231), click Process Task Monitor.
2. On Process Task Monitor, in the Process field, enter the name of the process that you want to monitor.
3. Complete the Status, Start Date, From, and Thru fields.

   These fields are optional.

1. Click Find to display the status of the process.
2.

Terminating, Suspending, or Resuming an Instance of a Process

To terminate, suspend, or resume an instance of a process.

1. From JD Edwards EnterpriseOne Workflow Advanced & Technical Operations (G0231), click Process Task Monitor.
2. On Process Task Monitor, find the process with which you want to work.
3. Select either Terminate, Suspend, or Resume from the Row menu.

Reviewing Attachments to a Task

To review attachments to a task From JD Edwards EnterpriseOne Workflow Advanced & Technical Operations (G0231):

1. Click Process Task Monitor.
2. Find the process with which you want to work.
3. Select the row for which you want to view attachments.
4. From the Row menu, select Attachments.

   If a task does not contain attachments, the Attachments option on the row menu is not enabled.

Overriding the Message Approval Process

To override the message approval process

1. From JD Edwards EnterpriseOne Workflow Advanced & Technical Operations (G0231), click Process Task Monitor.
2. On Process Task Monitor, find the process and task with which you want to work.
3. Select the row for which you want to override message approval.
4. Select Override from the Row menu.

   The system displays the Higher Level Override form.
5. Accept or reject the message.

   The system returns to Process Task Monitor.
6. Click OK.

Changing Queue Security

This section discusses change queue security and describes how to:

- Specify the Queues that a User Can View
- Change Public Security

Understanding Queue Security

You can change the security status for a user or group of users for a message queue. You can either give a user authority to monitor queues within a group or give public security to queues for all groups. You can add security by user, group, or role. For example, you might want to set up security for a manager so that she or he can monitor all messages within a group for certain queues. Or you might set up security by group only so that users within a group have authority to monitor messages within a group for certain queues. When you add security by group or role, the system applies that security to all members of that group or role. You can also give only a few people within a group access to certain queues by entering the user address book number and the group to define which queues a user in a particular group can access. Using the Employee Queue Manager (P012501) to view mail ignores security and all messages can be viewed.

Specify the Queues that a User Can View

When you set up a new user in a group, you must specify which queues that user can view within that group.

Change Public Security

When you assign the Public Security option, all users have access to queues that you specify. For example, if you select the Public Security option and give authority to the Collection Management queue, all users in the system are able to view all messages in that queue.

Specifying the Queues that a User Can View

To specify the queues that a user can view:

1. From JD Edwards EnterpriseOne Workflow Management Setup (G0241), select Queue Security.
2. On Work With JD Edwards EnterpriseOne Workflow Message Security, click Add.

   In this illustration, Dominique Abbott has access to the Electronic Workbench, Collection Management, Credit Management, Delinquency Notice Approval, and Delinquency Fee Approval queues for group 1001. She can monitor all messages within these queues for group 1001.
3. On JD Edwards EnterpriseOne Workflow Message Security Revisions, complete the User and Group/Role fields.
4. Specify the queues that a user can view by completing the Authority Y/N field and clicking OK.

Changing Public Security

To change public security

1. From JD Edwards EnterpriseOne Workflow Management Setup (G0241), select Queue Security.
2. Work With JD Edwards EnterpriseOne Workflow Message Security, click Add.
3. On JD Edwards EnterpriseOne Workflow Message Security Revisions, select the Public Security option.

When you select this option, the system protects the User and Group/Role fields because you are specifying that you want to give authority for specific queues to all users in the system.

4. Complete the Authority Y/N field and click OK.

Activating the Escalation Monitor

This section discusses the Escalation Monitor and describes how to activate the escalation monitor.

Understanding the Escalation Monitor

The escalation monitor, or Check for Expired Tasks program (R98810), checks for any Message task instances that have escalation associated with them. When the monitor finds Message tasks with escalation, it forwards those messages that have not been acted upon after a specified period of time to the next user. It also resumes Halt tasks after the specified delay. This chapter describes how to start the escalation monitor manually by submitting its batch version, as you do with any other batch process. However, the Scheduler application provides a convenient alternative for automatically restarting the escalation monitor at predefined intervals. Using the Scheduler is the recommended way of running the escalation monitor.

Warning! If the Scheduler is not used, you should restart the escalation monitor each time that it stops, with an acceptable duration between starts that depends on the urgency of Halts and Escalations. The escalation monitor does not automatically restart. If you do not restart the monitor, the processes that contain messages with escalation will not be reactivated. Therefore, it is recommended that you use the Scheduler application to automatically restart the escalation monitor.

Activating the Escalation Monitor

To activate the escalation monitor:

1. From JD Edwards EnterpriseOne Workflow Advanced & Technical Operations (G0231), click Start Escalation Monitor.
2. On Work With Batch Versions - Available Versions, select version XJDE0002, and then click Select.
3. On Version Prompting, select Data Selection or Data Sequencing, if necessary, and click the Submit button.

   Note. If you select Data Selection, on Data Selection, enter the condition for the data that you want to appear in the report, and then click OK to continue. If you select Data Sequencing, on Section Data Sequencing, select the columns that you want to sort on, and then click OK to continue.

4. On Report Output Destination, select the appropriate output option, and then click OK.

   When you run the monitor, the system produces a summary of Message tasks and Halt tasks that have not yet been completed.

Analyzing JD Edwards EnterpriseOne Workflow Processes

This section discusses analyzing JD Edwards EnterpriseOne Workflow processes and describes how to analyze a JD Edwards EnterpriseOne Workflow process.

Understanding How to Analyze a JD Edwards EnterpriseOne Workflow Process

You analyze JD Edwards EnterpriseOne Workflow processes using the Advanced Analysis application. Through Advanced Analysis, you can see how long it takes for a process to run and where processes might be queued. This analysis can help you make your processes more efficient and less time consuming. You can view an analysis using actual or average duration in days or hours, depending on your needs. You can export the data displayed in the Advanced Analysis form to a spreadsheet, or create graphs and charts of the information.

You can use several combinations of process, task, version, and instance to analyze process data. Following are some possible combinations:

Process, version, instance, actuals	The actual duration for each instance of the process and version from the Process Instance table (F98860).
Process, version, instance, task, actuals	The actual duration for each task within each instance from the Task Instance table (F98865).
Process	The average duration for all versions of a process.
Process, version, averages	The average duration of the instances for that version. The instances are averaged together, regardless of the instance keys.
Process, version, instance, averages	The average duration for instances, if instances with the same key exist.
Process, version, instance, task, averages	The average duration for each task within the instance, if instances with the same key exist.
Process, instance, task, averages	The average of tasks for like instance keys across versions.
Process, version, task, averages	The average duration for each task across instances. The tasks are averaged together, regardless of whether the instances to which they belong have the same key.
Process, task, averages	The average of task duration across versions.
Process by user	The average duration for all versions of the process for which that the user is responsible.
Process, version, by user	The average duration of the instances for that version for which the user is responsible. The instances are averaged together, regardless of the instance keys.
Process, version, by user	The average duration of the instances for that version for which the user is responsible. The instances are averaged together, regardless of the instance keys.
Process, version, instance, task, by user	The average duration of each task within instances that contain the same key for each responsible user.

Process, instance, task, by user	The average of tasks for like instances keys across versions for each responsible user.
Process, version, task, by user	The average duration for each task across instances for which the user was responsible. The tasks are averaged together, regardless of whether the instances to which they belong have the same key.
Process, task, by user	The average of task duration for each responsible user.

Analyzing a Process

To analyze a process:

1. On JD Edwards EnterpriseOne Workflow Advanced Analysis, click Find to query all processes, or complete the Process ID field and click Find to query a process.
2. Complete Version, Start Date From, Thru fields. These fields are optional.
3. To analyze a process by day or by hour, click the Search button in the Duration UOM field to select the appropriate unit of measure field.
4. Select the Actual or Averages option.

   If you select Actuals, the system automatically includes the process, version, and instance in the analysis. You can select whether to include task in the analysis.

   If you select Average, the system automatically includes the process in the analysis, and you can then select whether to view averages based on version, instance, or task.
5. If you want to analyze the Actuals for a process and you want to include tasks in the analysis, select Task.
6. If you want to analyze the averages for a process, select one or more of the following options: Version, Instance, Task.
7. If you want to view the user responsible for a process, select User.
8. Click Find.
9. To remove a row of data, select Remove Row from the Row menu.

Printing Process Instance Reports

This section discusses analyzing JD Edwards EnterpriseOne Workflow processes and describes how analyze a JD Edwards EnterpriseOne Workflow process.

Understanding Printing Process Instance Reports

You can print process instance reports to review information about the JD Edwards EnterpriseOne Workflow process task on paper rather than online or to archive process task information on paper for future reference.

Printing Process Instance Reports

To print process instance reports:

1. From the JD Edwards EnterpriseOne Workflow Advanced & Technical Operations menu (G0231), highlight Process Task Print.
2. Right-click Process Task Print and select Prompt For and then click Version from the popup menu.
3. select a version in the detail area and click Select.
4. On Version Prompting, select Data Selection or Data Sequencing, if necessary, and click the Submit button.
5. On Report Output Destination, select the appropriate output option for the report and then click OK.

Purging JD Edwards EnterpriseOne Workflow Data Files

This section the purge process and describes how to purge a JD Edwards EnterpriseOne Workflow process and task.

Understanding the Purge Process

When a JD Edwards EnterpriseOne Workflow process is run, the system creates Process Instance (F98860) and Task Instance (F98865) tables of the JD Edwards EnterpriseOne Workflow process. If you choose to have your JD Edwards EnterpriseOne Workflow process retain these records for historical purposes, the files may become very large and occupy storage resources. The presence of large amounts of data in the F98860 and F98865 tables will also hinder performance of the JD Edwards EnterpriseOne Workflow engine. You should purge JD Edwards EnterpriseOne Workflow data files periodically to minimize the amount of data in the tables and recover disk space. You can purge completed tasks or completed processes. Purging completed tasks deletes Message tasks, whereas purging completed JD Edwards EnterpriseOne Workflow processes deletes instances.

It is recommended that you purge completed processes regularly to minimize the amount of data in the tables. This process only purges records that do not affect active processes in the system and purges F98860 and F98865 records that possess a status of complete, terminated, or error.

Purging Completed JD Edwards EnterpriseOne Workflow Processes and Tasks

To purge completed JD Edwards EnterpriseOne Workflow processes:

1. From JD Edwards EnterpriseOne Workflow Advanced & Technical Operations (G0231), select Data File Purges and then Purge Completed Processes (R98860P).
2. On Work With Batch Versions - Available Versions, select a version from the detail area and click Select.
3. On Version Prompting, click Submit.

   By default, the batch process uses the following condition to delete the records that possess a status of complete, terminated, or error: Where BC Process Status (F98860) is equal to “03,05,06”
4. On Report Output Destination, select the appropriate output option and then click OK.
5. From JD Edwards EnterpriseOne Workflow Advanced & Technical Operations (G0231), select Data File Purges, and then select Purge Completed Tasks.
6. On Work With Batch Versions – Available Versions, select a version from the detail area and click Select.

7. On Version Prompting, click Submit.

Note. The default condition for this batch process deletes all messages that have been sent to the Deleted queue. You should not use Data Selection or Data Sequencing to modify this batch process.

8. On Report Output Destination, select the print destination and click OK.

Transferring JD Edwards EnterpriseOne Workflow Processes

This section discusses transferring a JD Edwards EnterpriseOne Workflow process.

Understanding JD Edwards EnterpriseOne Workflow Process Transfers

You must be careful when promoting JD Edwards EnterpriseOne Workflow processes through the development cycle. JD Edwards EnterpriseOne Workflow processes are transferred by Object Management Workbench (OMW) much like any other non-OMW object. However, a key difference is that instances of the modified process version may already be running in the target environment. Because of the wide range of changes that can be made while editing a JD Edwards EnterpriseOne Workflow process version, it cannot be guaranteed that the old instances will be able to complete under the new definition.

For example, if you delete a task from the JD Edwards EnterpriseOne Workflow definition and an instance in the target environment is currently executing task, the instance will not be able to determine what to do next once the task is completed. In a similar manner, all the historical data used for analysis can become invalid if the process is changed dramatically before it is transferred.

To keep this type of problem from occurring, it is recommended that you never modify a JD Edwards EnterpriseOne Workflow process version that has been promoted and used in the target environment. Instead, make a copy of that version; edit, test and promote it; and then deactivate the current version and activate the new version. OMW helps enforce this by not allowing you to transfer a JD Edwards EnterpriseOne Workflow process version into an environment if any historical instances of that particular version exist in the target environment.

The same types of problems can occur if you are using a particular process version and you receive and deploy an update to that version. This problem can be avoided if you do not use versions of JD Edwards EnterpriseOne Workflow processes. Instead, always make a copy of the JD Edwards version and activate your copy.

In OMW, JD Edwards EnterpriseOne Workflow data transfer is accomplished with object transfer activity rules. Consequently, you must add JD Edwards EnterpriseOne Workflow processes that need to be transferred from one environment to another to an OMW project.

Your system administrator usually sets up object transfer activity rules. These rules dictate the source and target locations for transferring objects and, in the case of JD Edwards EnterpriseOne Workflow processes, these values correspond to data source names. The rules are executed when a project is advanced from one status to another. The same transfer rules apply regardless of the logon environment.

APPENDIX A

System Functions in JD Edwards EnterpriseOne Workflow

This appendix discusses most of the system functions that you use for JD Edwards EnterpriseOne Workflow.

Send Message Extended

This system function enables an application to send email messages to users, groups, and so forth.

Send Message Extended

Description

This system function enables an application to send email messages to users, groups, and so forth.

Parameters

Parameter	Description
To recipient	Input, optional. The account or accounts to which to send the email.
Cc recipient	Input, optional. The account or accounts to which to send a courtesy copy of the email.
Bcc recipient	Input, optional. The account or accounts to which to send a blind courtesy copy of the email.
Mailbox	Input, required. The mailbox name to which to deliver the email. The mailbox is used only if the mail is delivered to Work Center. For mail delivered externally (such as SMTP mail), this parameter is ignored. Set the parameter to a specific mailbox or to an applicable object from the object list.
Subject	Input, required. The text to display in the subject line of the email. If the value is <*Blank*> or<*Zero*>, and you are basing the email on a DD item using the *Message* parameter, then the system sets the subject line to the DD item description, if one exists. Set the parameter to an alphanumeric constant, (<*Literal*>), <*Blank*>, <*Zero*>, or an applicable object from the object list.
Text	Input, required. The text to display in the body of the email. Set the parameter to an alphanumeric constant (<*Literal*>), <*Blank*>, <*Zero*>, or an applicable object from the object list.
Shortcut	Input, required. A link to a JD Edwards EnterpriseOne application. Set the parameter to the application to which to link or to <*None*>.
Message	Input, optional. The text to display in the body of the email, based on a DD item glossary. The recipient formatting preferences (for dates, times, and numeric values) as well as language preference (should a translation for this DD item be available) are used when composing the text that represents the message. Set the parameter to the DD item you want to use, or to <*None*>.
Media Object Name	Input, optional. The name of the media object to include in the email. Set the parameter to an applicable object from the object list, or to <*None*>.
Media Object Key	Input, optional. The key of the media object to include in the email. Set the parameter to an applicable object from the object list, or to <*None*>.

Additional Notes

The **Send Message Extended** system function supports multiple ways to define the recipient of a mail. You can dictate that the message is for a limited group (such as individuals, distribution lists, and so forth), or you can make the recipients dynamic. The delivery method is based on each user's email preferences. You must send the message using at least one of the recipient parameters, although which one you use is immaterial to the system.

When mapping a recipient parameter, these options are available:

- *AB Number*

  To send a message to a single user, enter the address book number of a user as the recipient. The mail will be sent to the default contact (contact number 0) for this address book number. Set the parameter to an applicable object from the object list.

Note. JD Edwards EnterpriseOne version 8.10 applications do not employ contacts; therefore, email is sent directly to a user based on the address book number.

- *Contact*

  To send a message to an individual in a user's contact list, enter the address book number of a user and then the number of the contact. Set the parameters to an applicable object from the object list.

Note. JD Edwards EnterpriseOne version 8.10 applications do not employ contacts; therefore, this parameter has no effect.

- *Grouped Distribution List*

  To send a message to the members of a distribution list, enter the address book number of the list and its structure type. Set the parameters to an applicable object from the object list.

- *Hierarchical Distribution List*

  To send a message to the members of a hierarchical distribution list, enter the distribution list structure type, and the address book number of the node to start from in the list. Set the parameters to an applicable object from the object list.

Note. This option is available only from within the JD Edwards EnterpriseOne Workflow modeler.

- *SMTP Address*

  To send a message to a single user, enter the SMTP address of the user as the recipient. Set the parameter to an applicable object from the object list.

- *Define Dynamic Recipient*

  This option enables the selection of any kind of recipient at runtime, as opposed to choosing the kind of recipient at design time (AB Number, Contact, Grouped Distribution List, Hierarchy Distribution List, or SMTP Address).

  All the parameters must be mapped to objects from the available object list. At runtime, the recipient is chosen dynamically based on the value of the *Recipient Type*:

  - *Recipient Type* is *'00'*:

    This is the equivalent of selecting <*None*>.

  - *Recipient Type* is *'01'*:

    This is the equivalent of selecting <*Contact*>. The subfields *Address book Number* and *Contact Number* are used to determine the recipient.

  - *Recipient Type* is *'02'*:

    This is the equivalent of selecting <*AB Number*>. The sub field *Address book Number* is used to determine the recipient.

  - *Recipient Type* is *'03'*:

    This is the equivalent of selecting <*Grouped Distribution List*>. The subfields *Address book Number* and *Structure Type* are used to determine the recipients where *Address book Number* is the AB number for the distribution list and *Structure Type* is the organizational structure, based on user-defined code (UDC) 01/TS.

- *Recipient Type* is *'04'*:

  This is the equivalent of selecting <*Hierarchical Distribution List*>. The subfields *Address book Number* and *Structure Type* are used to determine the recipients where *Structure Type* is the structure and list to use and *Address book Number* is the point in the hierarchy from which to start.

  Note. This hierarchical resolution is available only when you send the email to the JD Edwards EnterpriseOne work center.

- *Recipient Type* is *'05'*:

  This is the equivalent of selecting <*SMTP Address*>. The sub field *SMTP Address* will be used to determine the recipient.

- *Other values*

  Do not use other values, as they are reserved for future use. The list of supported recipient types is defined by UDC 98/SM.

• *None*

To not specify a recipient (use *None* when a recipient is optional).

The body of the email can be preset text (*Text*), or can be based on a DD item (<*Message*>). In either case, you can include a media object (<*Media Object Name*> and <*Media Object Key*>) and or a link directly to a JD Edwards EnterpriseOne application (<*Shortcut*>) as well.

Attachments can be sent with the mail, by providing the *Media Object Name* and *Media Object Key* parameters.

The system function will retrieve the attachments stored within the Media Object specified, and add the data to the mail sent. Only the Media Object 'RTF Text' and 'URL File' attachment types are supported.

Glossary of JD Edwards EnterpriseOne Terms

Accessor Methods/Assessors Java methods to "get" and "set" the elements of a value object or other source file.

activity rule The criteria by which an object progresses from one given point to the next in a flow.

add mode A condition of a form that enables users to input data.

Advanced Planning Agent (APAg) A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.

alternate currency A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.

In JD Edwards EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.

Application Server Software that provides the business logic for an application program in a distributed environment. The servers can be Oracle Application Server (OAS) or WebSphere Application Server (WAS).

as if processing A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.

as of processing A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.

Auto Commit Transaction A database connection through which all database operations are immediately written to the database.

back-to-back process A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.

batch processing A process of transferring records from a third-party system to JD Edwards EnterpriseOne.

In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.

batch server A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.

batch-of-one immediate A transaction method that enables a client application to perform work on a client workstation, then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks.

See also direct connect and store-and-forward.

best practices Non-mandatory guidelines that help the developer make better design decisions.

BPEL Abbreviation for Business Process Execution Language, a standard web services orchestration language, which enables you to assemble discrete services into an end-to-end process flow.

BPEL PM Abbreviation for Business Process Execution Language Process Manager, a comprehensive infrastructure for creating, deploying, and managing BPEL business processes.

Build Configuration File Configurable settings in a text file that are used by a build program to generate ANT scripts. ANT is a software tool used for automating build processes. These scripts build published business services.

build engineer An actor that is responsible for building, mastering, and packaging artifacts. Some build engineers are responsible for building application artifacts, and some are responsible for building foundation artifacts.

Build Program A WIN32 executable that reads build configuration files and generates an ANT script for building published business services.

business analyst An actor that determines if and why an EnterpriseOne business service needs to be developed.

business function A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.

business function event rule See named event rule (NER).

business service EnterpriseOne business logic written in Java. A business service is a collection of one or more artifacts. Unless specified otherwise, a business service implies both a published business service and business service.

business service artifacts Source files, descriptors, and so on that are managed for business service development and are needed for the business service build process.

business service class method A method that accesses resources provided by the business service framework.

business service configuration files Configuration files include, but are not limited to, interop.ini, JDBj.ini, and jdelog.properties.

business service cross reference A key and value data pair used during orchestration. Collectively refers to both the code and the key cross reference in the WSG/XPI based system.

business service cross-reference utilities Utility services installed in a BPEL/ESB environment that are used to access JD Edwards EnterpriseOne orchestration cross-reference data.

business service development environment A framework needed by an integration developer to develop and manage business services.

business services development tool Otherwise known as JDeveloper.

business service EnterpriseOne object A collection of artifacts managed by EnterpriseOne LCM tools. Named and represented within EnterpriseOne LCM similarly to other EnterpriseOne objects like tables, views, forms, and so on.

business service framework Parts of the business service foundation that are specifically for supporting business service development.

business service payload An object that is passed between an enterprise server and a business services server. The business service payload contains the input to the business service when passed to the business services server. The business service payload contains the results from the business service when passed to the Enterprise Server. In the case of notifications, the return business service payload contains the acknowledgement.

business service property Key value data pairs used to control the behavior or functionality of business services.

Business Service Property Admin Tool An EnterpriseOne application for developers and administrators to manage business service property records.

business service property business service group A classification for business service property at the business service level. This is generally a business service name. A business service level contains one or more business service property groups. Each business service property group may contain zero or more business service property records.

business service property categorization A way to categorize business service properties. These properties are categorized by business service.

business service property key A unique name that identifies the business service property globally in the system.

business service property utilities A utility API used in business service development to access EnterpriseOne business service property data.

business service property value A value for a business service property.

business service repository A source management system, for example ClearCase, where business service artifacts and build files are stored. Or, a physical directory in network.

business services server The physical machine where the business services are located. Business services are run on an application server instance.

business services source file or business service class One type of business service artifact. A text file with the .java file type written to be compiled by a Java compiler.

business service value object template The structural representation of a business service value object used in a C-business function.

Business Service Value Object Template Utility A utility used to create a business service value object template from a business service value object.

business services server artifact The object to be deployed to the business services server.

business view A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.

central objects merge A process that blends a customer's modifications to the objects in a current release with objects in a new release.

central server A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.

charts Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.

check-in repository A repository for developers to check in and check out business service artifacts. There are multiple check-in repositories. Each can be used for a different purpose (for example, development, production, testing, and so on).

connector Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.

contra/clearing account A general ledger account in JD Edwards EnterpriseOne Financial Management that is used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations in JD Edwards EnterpriseOne Financial Management.

Control Table Workbench An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.

control tables merge A process that blends a customer's modifications to the control tables with the data that accompanies a new release.

correlation data The data used to tie HTTP responses with requests that consist of business service name and method.

cost assignment The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.

cost component In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).

credentials A valid set of JD Edwards EnterpriseOne username/password/environment/role, EnterpriseOne session, or EnterpriseOne token.

Cross-reference utility services Utility services installed in a BPEL/ESB environment that access EnterpriseOne cross-reference data.

cross segment edit A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.

currency restatement The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.

cXML A protocol used to facilitate communication between business documents and procurement applications, and between e-commerce hubs and suppliers.

database credentials A valid database username/password.

database server A server in a local area network that maintains a database and performs searches for client computers.

Data Source Workbench An application that, during the Installation Workbench process, copies all data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the system-release number data source. It also updates the Data Source Plan detail record to reflect completion.

date pattern A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.

denominated-in currency The company currency in which financial reports are based.

deployment artifacts Artifacts that are needed for the deployment process, such as servers, ports, and such.

deployment server A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.

detail information Information that relates to individual lines in JD Edwards EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).

direct connect A transaction method in which a client application communicates interactively and directly with a server application.

See also batch-of-one immediate and store-and-forward.

Do Not Translate (DNT) A type of data source that must exist on the iSeries because of BLOB restrictions.

dual pricing The process of providing prices for goods and services in two currencies.

duplicate published business services authorization records Two published business services authorization records with the same user identification information and published business services identification information.

embedded application server instance An OC4J instance started by and running wholly within JDeveloper.

edit code A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.

edit mode A condition of a form that enables users to change data.

edit rule A method used for formatting and validating user entries against a predefined rule or set of rules.

Electronic Data Interchange (EDI) An interoperability model that enables paperless computer-to-computer exchange of business transactions between JD Edwards EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.

embedded event rule An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.

Employee Work Center A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages.

enterprise server A server that contains the database and the logic for JD Edwards EnterpriseOne.

Enterprise Service Bus (ESB) Middleware infrastructure products or technologies based on web services standards that enable a service-oriented architecture using an event-driven and XML-based messaging framework (the bus).

EnterpriseOne administrator An actor responsible for the EnterpriseOne administration system.

EnterpriseOne credentials A user ID, password, environment, and role used to validate a user of EnterpriseOne.

EnterpriseOne object A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects.

EnterpriseOne development client Historically called "fat client," a collection of installed EnterpriseOne components required to develop EnterpriseOne artifacts, including the Microsoft Windows client and design tools.

EnterpriseOne extension A JDeveloper component (plug-in) specific to EnterpriseOne. A JDeveloper wizard is a specific example of an extension.

EnterpriseOne process A software process that enables JD Edwards EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. JD Edwards EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.

EnterpriseOne resource Any EnterpriseOne table, metadata, business function, dictionary information, or other information restricted to authorized users.

Environment Workbench An application that, during the Installation Workbench process, copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the system-release number data source. It also updates the Environment Plan detail record to reflect completion.

escalation monitor A batch process that monitors pending requests or activities and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.

event rule A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.

explicit transaction Transaction used by a business service developer to explicitly control the type (auto or manual) and the scope of transaction boundaries within a business service.

exposed method or value object Published business service source files or parts of published business service source files that are part of the published interface. These are part of the contract with the customer.

facility An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. A facility is sometimes referred to as a "business unit."

fast path A command prompt that enables the user to move quickly among menus and applications by using specific commands.

file server A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network users request files and make changes to these files.

final mode The report processing mode of a processing mode of a program that updates or creates data records.

foundation A framework that must be accessible for execution of business services at runtime. This includes, but is not limited to, the Java Connector and JDBj.

FTP server A server that responds to requests for files via file transfer protocol.

header information Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.

HTTP Adapter A generic set of services that are used to do the basic HTTP operations, such as GET, POST, PUT, DELETE, TRACE, HEAD, and OPTIONS with the provided URL.

instantiate A Java term meaning "to create." When a class is instantiated, a new instance is created.

integration developer The user of the system who develops, runs, and debugs the EnterpriseOne business services. The integration developer uses the EnterpriseOne business services to develop these components.

integration point (IP) The business logic in previous implementations of EnterpriseOne that exposes a document level interface. This type of logic used to be called XBPs. In EnterpriseOne 8.11, IPs are implemented in Web Services Gateway powered by webMethods.

integration server A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.

integrity test A process used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.

interface table See Z table.

internal method or value object Business service source files or parts of business service source files that are not part of the published interface. These could be private or protected methods. These could be value objects not used in published methods.

interoperability model A method for third-party systems to connect to or access JD Edwards EnterpriseOne.

in-your-face-error In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.

IServer service This internet server service resides on the web server and is used to speed up delivery of the Java class files from the database to the client.

jargon An alternative data dictionary item description that JD Edwards EnterpriseOne appears based on the product code of the current object.

Java application server A component-based server that resides in the middle-tier of a server-centric architecture. This server provides middleware services for security and state maintenance, along with data access and persistence.

JDBNET A database driver that enables heterogeneous servers to access each other's data.

JDEBASE Database Middleware A JD Edwards EnterpriseOne proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.

JDECallObject An API used by business functions to invoke other business functions.

jde.ini A JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards EnterpriseOne. This includes workstations and servers.

JDEIPC Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log The main diagnostic log file of JD Edwards EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of JD Edwards EnterpriseOne.

JDENET A JD Edwards EnterpriseOne proprietary communications middleware package. This package is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all JD Edwards EnterpriseOne supported platforms.

JDeveloper Project An artifact that JDeveloper uses to categorize and compile source files.

JDeveloper Workspace An artifact that JDeveloper uses to organize project files. It contains one or more project files.

JMS Queue A Java Messaging service queue used for point-to-point messaging.

listener service A listener that listens for XML messages over HTTP.

local repository A developer's local development environment that is used to store business service artifacts.

local standalone BPEL/ESB server A standalone BPEL/ESB server that is not installed within an application server.

Location Workbench An application that, during the Installation Workbench process, copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the system data source.

logic server A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when JD Edwards EnterpriseOne software runs.

MailMerge Workbench An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.

Manual Commit transaction A database connection where all database operations delay writing to the database until a call to commit is made.

master business function (MBF) An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.

master table See published table.

matching document A document associated with an original document to complete or change a transaction. For example, in JD Edwards EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.

media storage object Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.

message center A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user.

messaging adapter An interoperability model that enables third-party systems to connect to JD Edwards EnterpriseOne to exchange information through the use of messaging queues.

messaging server A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.

Middle-Tier BPEL/ESB Server A BPEL/ESB server that is installed within an application server.

Monitoring Application An EnterpriseOne tool provided for an administrator to get statistical information for various EntepriseOne servers, reset statistics, and set notifications.

named event rule (NER) Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.

nota fiscal In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.

nota fiscal factura In Brazil, a nota fiscal with invoice information.

See also *nota fiscal.*

Object Configuration Manager (OCM) In JD Edwards EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.

Object Librarian A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.

Object Librarian merge A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.

Open Data Access (ODA) An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.

Output Stream Access (OSA) An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

package JD Edwards EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the installation program can find them. It is point-in-time snapshot of the central objects on the deployment server.

package build A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in JD Edwards EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.

Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”

package location The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.

Package Workbench An application that, during the Installation Workbench process, transfers the package information tables from the Planner data source to the system-release number data source. It also updates the Package Plan detail record to reflect completion.

Pathcode Directory The specific portion of the file system on the EnterpriseOne development client where EnterpriseOne development artifacts are stored.

patterns General repeatable solutions to a commonly occurring problem in software design. For business service development, the focus is on the object relationships and interactions. For orchestrations, the focus is on the integration patterns (for example, synchronous and asynchronous request/response, publish, notify, and receive/reply).

planning family A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.

preference profile The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.

print server The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.

pristine environment A JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.

production environment A JD Edwards EnterpriseOne environment in which users operate EnterpriseOne software.

production-grade file server A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

Production Published Business Services Web Service Published business services web service deployed to a production application server.

program temporary fix (PTF) A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.

project In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

promotion path The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.

proxy server A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.

published business service EnterpriseOne service level logic and interface. A classification of a published business service indicating the intention to be exposed to external (non-EnterpriseOne) systems.

published business service identification information Information about a published business service used to determine relevant authorization records. Published business services + method name, published business services, or *ALL.

published business service web service — Published business services components packaged as J2EE Web Service (namely, a J2EE EAR file that contains business service classes, business service foundation, configuration files, and web service artifacts).

published table — Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

publisher — The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

pull replication — One of the JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards EnterpriseOne data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the F98DRPCN table.

QBE — An abbreviation for query by example. In JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event — A message triggered from EnterpriseOne application logic that is intended for external systems to consume.

refresh — A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.

replication server — A server that is responsible for replicating central objects to client machines.

Rt-Addressing — Unique data identifying a browser session that initiates the business services call request host/port user session.

rules — Mandatory guidelines that are not enforced by tooling, but must be followed in order to accomplish the desired results and to meet specified standards.

quote order — In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.

secure by default — A security model that assumes that a user does not have permission to execute an object unless there is a specific record indicating such permissions.

Secure Socket Layer (SSL) — A security protocol that provides communication privacy. SSL enables client and server applications to communicate in a way that is designed to prevent eavesdropping, tampering, and message forgery.

SEI implementation — A Java class that implements the methods that declare in a Service Endpoint Interface (SEI).

selection — Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.

serialize — The process of converting an object or data into a format for storage or transmission across a network connection link with the ability to reconstruct the original data or objects when needed.

Server Workbench — An application that, during the Installation Workbench process, copies the server configuration files from the Planner data source to the system-release number

	data source. The application also updates the Server Plan detail record to reflect completion.
Service Endpoint Interface (SEI)	A Java interface that declares the methods that a client can invoke on the service.
SOA	Abbreviation for Service Oriented Architecture.
soft coding	A coding technique that enables an administrator to manipulate site-specific variables that affect the execution of a given process.
source repository	A repository for HTTP adapter and listener service development environment artifacts.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
SSL Certificate	A special message signed by a certificate authority that contains the name of a user and that user's public key in such a way that anyone can "verify" that the message was signed by no one other than the certification authority and thereby develop trust in the user's public key.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
superclass	An inheritance concept of the Java language where a class is an instance of something, but is also more specific. "Tree" might be the superclass of "Oak" and "Elm," for example.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs. For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across JD Edwards EnterpriseOne systems.
table access management (TAM)	The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-defined data. TAM stores information, such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
Table Conversion Workbench	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table conversion An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.

table event rules Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.

terminal server A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing The task of entering, reviewing and approving, and posting batches of transactions in JD Edwards EnterpriseOne.

three-way voucher match In JD Edwards Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.

transaction processing (TP) monitor A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and may include programs that validate data and format terminal screens.

transaction processing method A method related to the management of a manual commit transaction boundary (for example, start, commit, rollback, and cancel).

transaction set An electronic business transaction (electronic data interchange standard document) made up of segments.

trigger One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.

triggering event A specific workflow event that requires special action or has defined consequences or resulting actions.

two-way authentication An authentication mechanism in which both client and server authenticate themselves by providing the SSL certificates to each other.

two-way voucher match In JD Edwards Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.

user identification information User ID, role, or *public.

User Overrides merge Adds new user override records into a customer's user override table.

value object A specific type of source file that holds input or output data, much like a data structure passes data. Value objects can be exposed (used in a published business service) or internal, and input or output. They are comprised of simple and complex elements and accessories to those elements.

variance In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment.

In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, the difference between two methods of costing the same item (for example, the difference between the frozen standard cost and the current cost is an engineering variance). Frozen standard costs come from the Cost Components table, and the current costs are calculated using the current bill of material, routing, and overhead rates.

versioning a published business service Adding additional functionality/interfaces to the published business services without modifying the existing functionality/interfaces.

Version List merge The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release, as well as their processing options data.

visual assist Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.

vocabulary override An alternate description for a data dictionary item that appears on a specific JD Edwards EnterpriseOne form or report.

wchar_t An internal type of a wide character. It is used for writing portable programs for international markets.

web application server A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.

web server A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.

Web Service Description Language (WSDL) An XML format for describing network services.

Web Service Inspection Language (WSIL) An XML format for assisting in the inspection of a site for available services and a set of rules for how inspection-related information should be made.

web service proxy foundation Foundation classes for web service proxy that must be included in a business service server artifact for web service consumption on WAS.

web service softcoding record An XML document that contains values that are used to configure a web service proxy. This document identifies the endpoint and conditionally includes security information.

web service softcoding template An XML document that provides the structure for a soft coded record.

Where clause The portion of a database operation that specifies which records the database operation will affect.

Windows terminal server A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

wizard A type of JDeveloper extension used to walk the user through a series of steps.

workbench A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.

work day calendar In JD Edwards EnterpriseOne Manufacturing, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work

	day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.
workflow	The automation of a business process, in whole or in part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.
workgroup server	A server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.
XAPI events	A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when the specified transactions occur to return a response.
XML CallObject	An interoperability capability that enables you to call business functions.
XML Dispatch	An interoperability capability that provides a single point of entry for all XML documents coming into JD Edwards EnterpriseOne for responses.
XML List	An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.
XML Service	An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.
XML Transaction	An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.
XML Transaction Service (XTS)	Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.
Z event	A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.
Z table	A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.
Z transaction	Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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