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# **JD Edwards World**

# **Technical Foundation**

# **Guide**

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**Version A9.1**

**Revised - May 15, 2008**

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# 1 Overview



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# Overview to Technical Foundation

## Technical Foundation Integration

The Technical Foundation course provides hands-on experience for learning the components of the JD Edwards World AS/400 software environment. These components are part of a well-engineered design known as World CASE Products.

This section contains the following:

- [Features of Technical Foundation](#)
- [JD Edwards World Product Line](#)

## What World CASE Includes

World CASE covers the entire spectrum of the application development life cycle including:

- Design tools
- Code generation
- Automatic documentation generation
- Prototyping
- Repositories
- Productivity improvement tools

## The AS/400 Technical Platforms

There are three technical platforms:

- Computer Assisted Software Engineering (CASE)
- Design Platform
- Run Time Option Platform

## Features of Technical Foundation

The Run Time Option Platform includes the following features.

### Data Dictionary

- Stores all data elements used with your terminology

- Stores Alias and data item names
- Stores all physical attributes of data
- Stores all textual Help
- Stores editing and validation information
- Works at runtime, not just during development

## **Software Versions Repository**

- Contains screens, reports, source, programs, tables
- Captures complete design specifications for maximum reusability
- Stores all version and other environmental information
- Allows all objects direct access to the CASE tool
- Provides extensive cross-reference services

## **User Defined Codes Repository**

- Reduces programmer involvement in ordinary edit changes
- Allows user to define/customize their allowed values
- Allows user to specify code descriptions conveniently
- Meets industry specific coding demands
- Eliminates a multitude of code files and programs

## **Vocabulary Overrides Repository**

- Allows users to specify screen column and row headings
- Provides multi-language, multi-industry customization
- Retains custom changes with JD Edwards World software updates

## **Soft-coded Function Keys**

- Adapts function keys to “your” standards
- Provides user defined function key security
- Reduces need for programmer involvement in function key changes

## **Extended Security**

- Multiple tests to control menu access
- Multiple tests to control access to menu selections
- Action Code security
- Business Unit security
- Job security



- Batch approval security
- Menu travel security
- IBM command entry line security
- Fast Path security
- Function Key security
- Group security
- UDC Codes Security

## **Unattended Night Operations (Sleeper)**

- Preschedule batch operations
- Schedule daily jobs
- Schedule jobs for designated days of the week
- Schedule monthly jobs
- Schedule time of day for batch submission

## **Menu Driver**

- Fast path menu travel
- Word search for menu selection and jobs
- Hidden menu selections
- Custom, user definable menus
- Menu cloning with browse and select capability
- Menu selection highlighting
- Program help access from menus and programs
- Windowed menu lists with interactive selections
- Menu hierarchy management

## **DREAM Writer**

- User defined record selection for reports
- User defined record selection for processing
- Full boolean logic
- AND/OR selection logic
- User defined report titling
- User defined data sequencing
- User defined report totaling and page skipping

## **Processing Run Time Options Repository**

- Allows users to vary the format of selected reports
- Allows users to vary the format of selected screens
- Allows users to restrict data on screens and reports
- Allows users to indicate summarization levels on reports
- Allows users to select the way data is processed
- Allows users to customize reports and screens
- Gives the user the ability to provide an extensive set of parameter values to selected programs
- Eliminates a multitude of unique prompting screen displays

## **Online and Printed User Documentation**

- Produce/scan documentation from the common development workstation
- Online documentation
- Report/Screen illustrations
- Program help instructions
- Glossary of terms and codes
- Menu illustrations

## **JD Edwards World Product Line**

Contact your account representative for more information concerning these products.

## **Financials**

- General Accounting
- Accounts Payable
- Accounts Receivable
- Fixed Assets
- Financial Modeling and Budgeting
- Multi-Currency, Multi-Language, Multi-National Processing
- Flexible Reporting Tools
- Address Book/Electronic Mail
- Human Resources
- Payroll
- Time Accounting

## **Distribution/Logistics**

- Sales Order Management
- Configuration Management
- Advanced Pricing
- Forecasting
- Requirements Planning
- Enterprise Facility Planning
- Purchase Management
- Inventory Management
- Advanced Warehouse Management
- Transportation Management
- Data Collection
- EDI/Electronic Commerce

## **Manufacturing**

- Product Data Management
- Configuration Management
- Plant and Equipment Maintenance
- Shop Floor Control
- Forecasting
- Requirements Planning
- Enterprise Facility Planning
- Capacity Requirements Planning
- Finite Scheduler
- Environmental Management System
- Data Collection

## **Energy and Chemical**

- Process Manufacturing/Lube Oil Blending
- Equipment Management
- Inventory Management
- Bulk Stock Control
- Distribution Contracts
- Sales Order Management and Pricing
- Load and Delivery Management

- Forecasting
- Enterprise Facility Planning
- Purchase Management

## **Architecture, Engineering, Construction, and Real Estate**

- Job/Project Cost Accounting
- Work Order Management
- Project Change Management
- Contract Management
- Contract Billing
- Engineering and Service Billing
- Equipment Management
- Homebuilder Management
- Real Estate Management

## **Public Services: State and Local Governments, Education, and Utilities**

- Financial Administration and Reporting
- Budget Administration
- Fund and Encumbrance Accounting
- Grant and Endowment Management
- Purchasing and Material Management
- Warehousing and Central Stores Management
- Human Resources Management
- Service and Word Order Management
- Capital Project and Construction Management
- Contract Management
- Plant, Equipment, and Fleet Maintenance
- Customer Information and Billing Administration
- Assessment and Property Tax Administration

## **Other Integrated Solutions**

- Bar Coding/Data Collection
- Connectivity/Network Solutions
- Development Tools
- Distributed Data Processing

- EDI/Electronic Commerce
- Enterprise Information Systems
- Facsimile Management
- PC Integration

## JD Edwards System Codes

The following is a list of JD Edwards World system codes and their descriptions.

System Number	System
00	General Back Office
01	Address Book
02	Electronic Mail
03	Accounts Receivable
03B	Enhanced Accounts Receivable
03C	Customer Issue Tracking
04	Accounts Payable
05	Standalone Time Accounting
06	Old Payroll
07	New Payroll
08	Human Resources
08A	Application Tracking
08B	Benefits Administration
08C	Canadian Specific HR Functions
08H	Health and Safety
08P	Position Control
08R	Requisitions
08U	US Specific HR Functions
08W	Wage and Salary
09	General Accounting
09E	Expense Reimbursement Reporting System Only
10	Financial Reporting
10C	Multi-Site Consolidations

System Number	System
11	Foreign Currency/Cash Basis
11C	Cash Basis Accounting
12	Fixed Assets
13	Equipment/Plant Management
14	Modeling, Planning, and Budgeting
15	Commercial Property Management
16	Residential Property Management
17	Customer Service Management
17A	Ariba Integration Reporting Purposes Only
17C	Call Management Reporting Purposes Only
18	Resource Scheduling Reporting Purposes Only
19	Utility CIS
20	Energy Data Base
21	Lease Management
22	Production System
23	Revenue Distribution
24	Contracts
25	Joint Interest Billing
26	Gas Balancing
27	Investor Services
28	Projects on Hold – Energy
29	AFE Accounting
30	Product Data Management
30A	Product Costing Reporting Only
31	Shop Floor Control
31A	Manufacturing Accounting
3110	Process Control
32	Configuration Processing
32C	Custom Works

<b>System Number</b>	<b>System</b>
33	Capacity Requirements Planning
34	DRP/MPS/MRP
34A	Advanced Planning & Scheduling
35	Enterprise Facility Planning
36	Forecasting
37	Quality Management
38	Distribution Contracts
39	Bulk Stock Control
40	Inventory/OP Base
4010	Advanced Price Adjustments
41	Inventory Management
41B	Bulk Stock Control
42	Sales Order Processing
42A	Sales Force Automation Reporting Purposes Only
42B	Enterprise One Sales Order Entry
42E	ECS Sales Order Processing
43	Purchase Order Processing
44	Contract Administration
44H	Homebuilder Management
4401	Homebuilder Management
45	Advanced Price Analysis
46	Warehouse Management
47	Electronic Data Interchange
48	Work Order Processing
48S	Service Billing
49	Transportation
50	Job Cost Accounting
51	Job Cost Accounting
52	Job Cost Billing

<b>System Number</b>	<b>System</b>
53	Change Management
55-59	Reserved for Clients
60-69	Reserved for JD Edwards World Custom
70	Multi-National Products
71	Client Server Applications
73	M&D Complimentary Products
74	EMEA Localizations
74G	Greece
74H	Hungary
74I	Ireland
74L	Portugal
74N	Nordics
74P	Poland
74R	CIBS
74S	Spain
74T	Turkey
74Z	Czech Republic
75	Asia Pacific Localizations
75H	Thailand
75I	India
75K	South Korea
7T	Taiwan
76	Latin American Localization
76A	Argentinean Localization
76C	Columbia
76H	Chile
77	Canadian Payroll
77Y	Canadian Payroll Year End Programs Reporting System Only
78	OBSOLETE CS Travel Expense Management



<b>System Number</b>	<b>System</b>
79	OBSOLETE Foreign Translation
80	Business Intelligence
81	DREAM Writer
82	World Writer
83	Finance Report Writer-FASTR
84	Distributed Data Processing
85	Custom Programming
86	Foreign Language Translation
87	JD Edwards World Internal
88	Cautious Purge System
89	Conversion Programs
91	Documentation
92	Computer Assisted Design
93	Computer Assisted Programming
94	Security Officer
95	Unattended Night Operations
96	Computer Operations
97	Software Load & Install
98	Technical Aids
98e	Electronic Burst & Bind
98FT	Form Type
98SA	Sample Application
99	Technical Aids – Internal
99D	Technical Tools – DASD Sizer Reporting Purposes Only
99M	Technical Tools - Masters/Update Reporting Purposes Only



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## **2 JD Edwards World Environment**



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# Overview to the JD Edwards World Environment

## Objectives

- To understand the sign-on and sign-off procedures
- To understand the menu format
- To understand menu traveling
- To understand menu and program functions and options
- To understand hidden selections

## About the JD Edwards World Environment

With any system, there's always a minimum you need to know to get started. The basics include signing on and off the JD Edwards World system, moving around in the system, and becoming familiar with command functions and options for the system.

Complete the following tasks:

- Sign on and off the JD Edwards World system
- Work with menu traveling
- Display functions and options
- Understand hidden selections



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# Sign On and Off the JD Edwards World System

## Preparing to Sign On and Off

Before you use the system you have to sign on to it.

This section contains the following:

- [Understanding the User ID and Password](#)
- [Signing On the System](#)
- [Signing Off the System](#)

## Understanding the User ID and Password

### What is the User ID?

The User ID is:

- The name that identifies you to the computer
- Usually assigned by the Security Officer (QSECOFR)

### What is the Password?

The Password:

- Ensures that unauthorized people do not use your User ID
- In a training environment, the password is the same as your User ID. Feel free to change your password for a class.

## Signing On the System

To sign on the system

From the Sign On menu

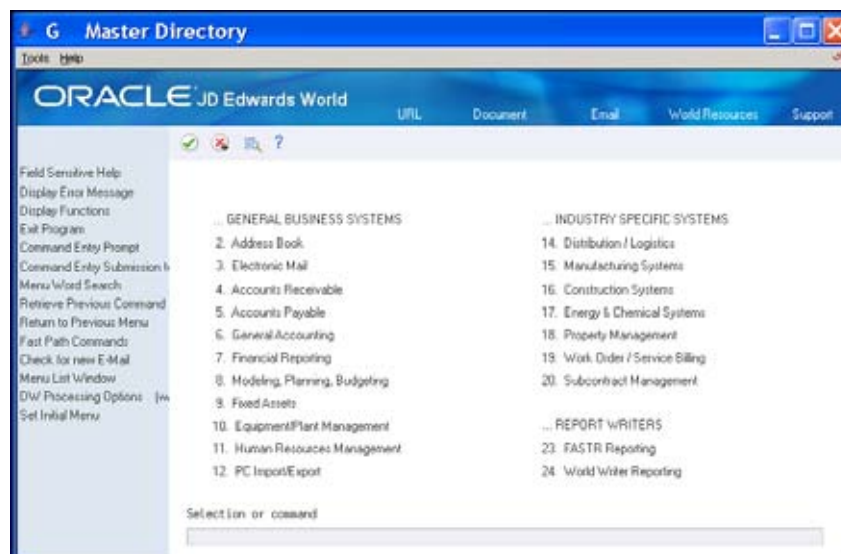


1. Complete the following fields, pressing Tab to get to the next field.

- User ID
- Password

2. Press Enter.

The Master Directory menu displays.





## What is the Master Directory?

The Master Directory lists the main product groups that JD Edwards World offers. The Master Directory is a menu of menus; every selection from the Master Directory accesses the main menu for that system.

## Signing Off the System

### To sign off the system

It is recommended that you sign off to protect your work. If you remain signed on to the system and leave your workstation, the workstation is at risk of another user modifying or deleting your work.

To sign off, enter one of the following four values into the Selection line of any menu:

- Two periods (..)
- 90—this is the Hidden Selection for signing off.
- The command Sign-off if the system allows IBM Command Entry.
- 30—used with J.D. Edward's Multi-Library List Function J98INITA.



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# Work with Menu Traveling

## Preparing to Menu Travel

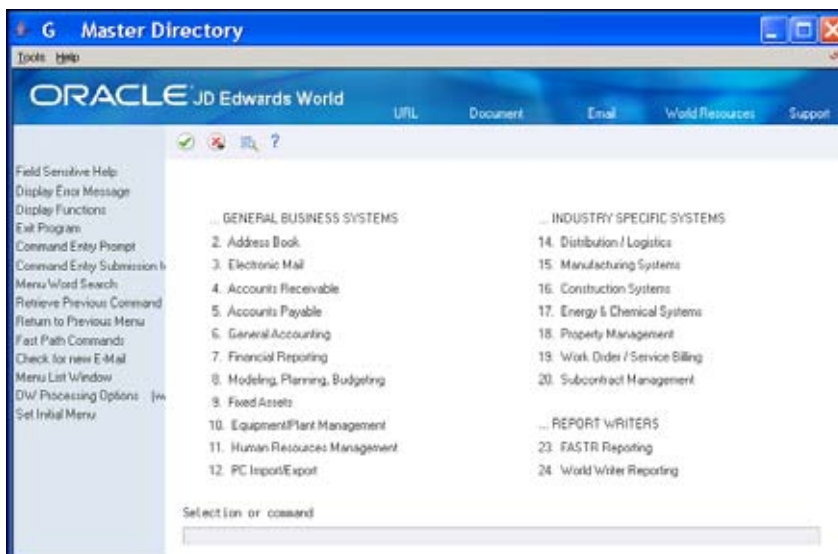
Menu traveling is a term for moving from a menu to a menu or program. There are different methods as explained.

This section contains the following:

- [Understanding the Menu Format](#)
- [Working with Menu Traveling](#)

## Understanding the Menu Format

Before you menu travel through the system, here are the important aspects of a JD Edwards World menu.



The menu format includes the following:

- The menu ID displays in the upper left corner
- The display level displays below the time on the upper left, when applicable
- The company name and menu title display at the top

Use the data item #menuttl to change the company name on menus. Data items are stored in the Data Dictionary.

- The system name displays in the upper right corner

- The Selection line displays on the bottom of the menu
- The user name and terminal ID display in the upper right corner
- Available selections display in the middle of the menu
- Our menus use a double-column format with up to 24 selections.

## Working with Menu Traveling

Now that you are familiar with the format of our menus, complete the following tasks:

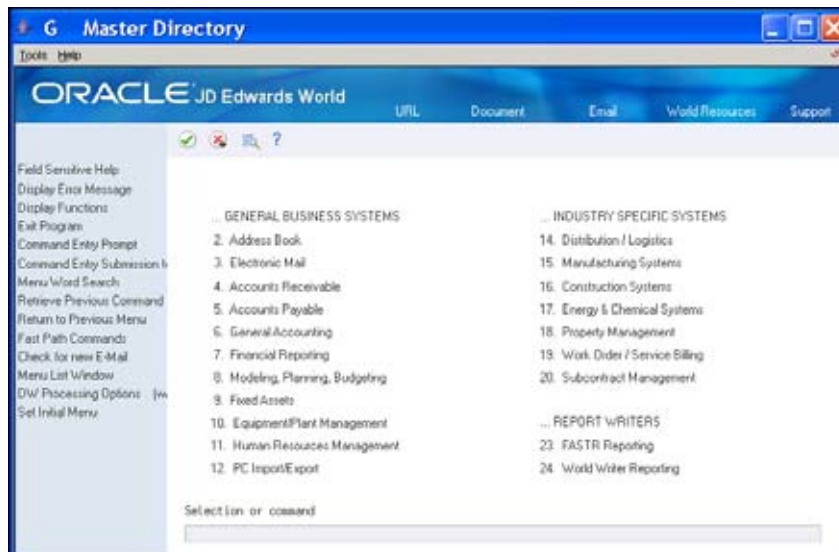
- Menu travel via menu selections
- Menu travel directly
- Menu travel via hidden selections 27 and 29
- Menu travel via the Index of Menus
- Menu travel via fast paths
- Add a new fast path
- Menu travel via the Menu Word Search
- Go back one menu at a time
- Return to the sign-on menu

### To menu travel via menu selections

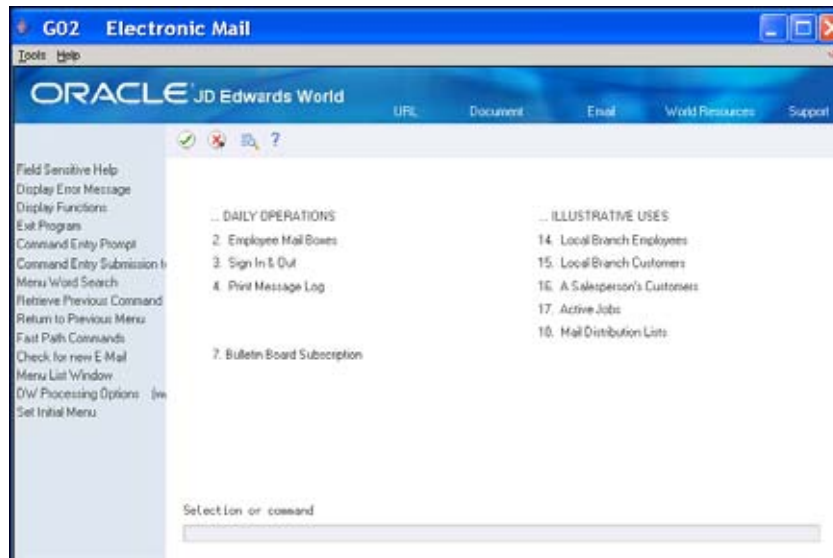
Menu Selections either point to another menu or access a program.

From any menu, such as the Master Directory, do one of the following:

- Choose the menu selection
- Enter a menu selection number on the command line.

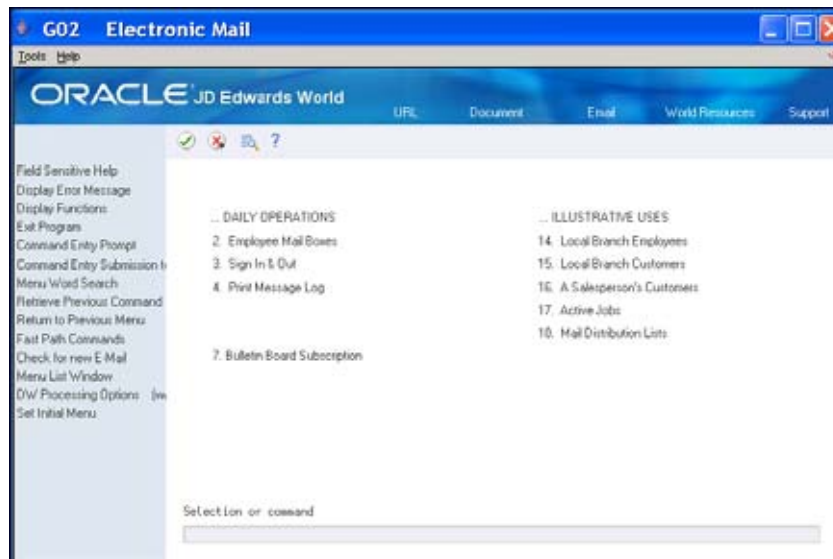


In the following example, choosing menu selection 3 on the Mastery Directory displays the Electronic Mail menu.

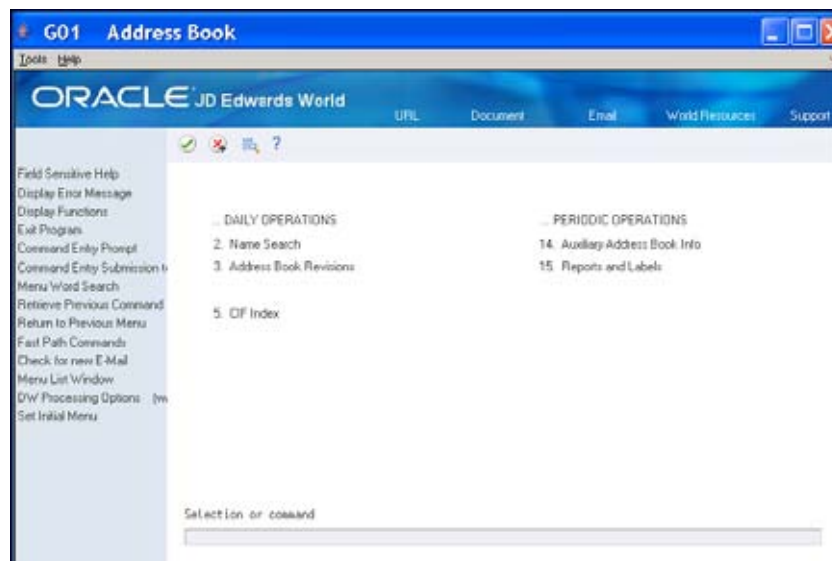


To menu travel directly

From any menu, in this example the Electronic Mail menu, enter a menu ID on the command line.



In this example, entering G01 on the command line of Electronic Mail displays the Address Book menu. Note Address Book's menu ID in the upper left corner.



You can secure the menu travel option through user profiles.

## To menu travel via hidden selections 27 and 29

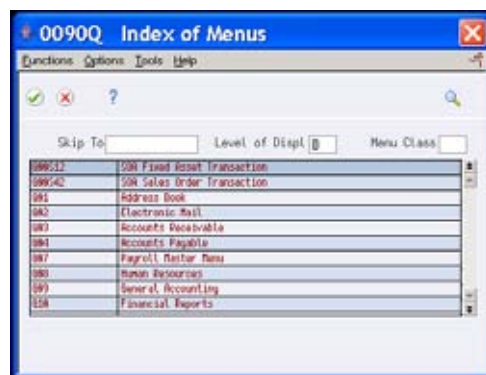
You can travel to other menus that are not visible. Certain menu options are hidden and you must choose to access them. The menu options are hidden to protect accidental use. Menu travel via hidden selections 27 and 29 can take you to additional menus.

Do one of the following:

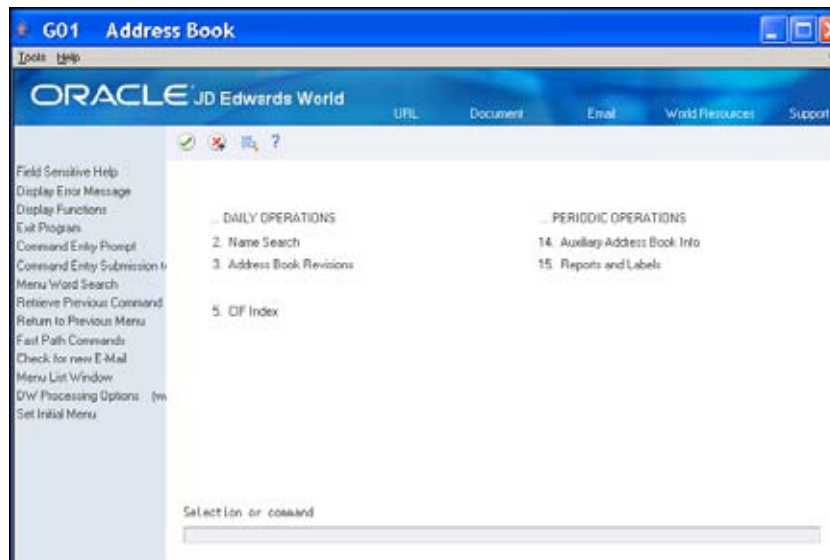
- Enter 27 on the command line to access the A/B Advanced & Technical Operations menu for the Address Book system.
- Enter 29 on the command line to access the Setup menu for the Address Book system.

## To menu travel via the Index of Menus

1. From any menu, choose Menu List Window (F16) to display the Index of Menus screen.



2. From this screen, do one of the following:
  - Page up and page down to view menus
  - Complete the Skip To field to view the desired menu on the Index of Menus
  - Enter a number, 1 - 9, in the Display Level field to display those menus at that level and below. For example, if Menu Level is 1, Daily Operations menus as well as Product Group menus and Major Product Directories display.
  - Choose a menu and then choose Select/Work With (option 4) from the Options menu to select a menu. For example, if you choose of Address Book (G01) and then choose Select/Work With from the Options menu, that menu displays.
  - Choose a menu option and then choose Display Menu Details (F4) from the Options menu to view additional information.



## To menu travel via fast paths

Enter one of the following fast path executions on a command line:

- Super Fast Path (Mnemonics)—for example, DD for Data Dictionary
- Fast Path—for example, 4/G92 for the Data Dictionary menu selection

You can define a word, mnemonic, or abbreviation to execute a particular menu selection in User Defined Codes. A list of fast path commands is available in UDC table 00FP. You can modify or add fast path commands from this table.

For example, assign DD to access the Data Dictionary. From any menu you can enter DD in the selection line and display the Data Dictionary program.

Choose Fast path Commands (F13) to display available mnemonics.

## To add a new fast path

	From General Systems (G00), choose General User Defined Codes
--	---

When creating a new fast path, you use uppercase letters for menus, for example, enter G0411 not g0411.

Enter the menu selection as selection/menu. For example, enter 3/G0411 to indicate menu selection 3 on menu G0411

Enter IBM commands in upper or lower case. You cannot specify F4 to prompt a command.

1. On General User Defined Codes, to locate System Code 00 and User Defined Code FP, enter 00 in the System Code field and FP in the User Defined Code field.
2. Complete the following fields:
  - Code
  - Description
  - Description 2

Your changes take effect immediately. You do not need to sign off of the system.

Field	Explanation
Code	Enter up to 10 characters. This code is the command that the user enters on the menu command line.



Field	Explanation
Description	Enter a brief description of the fast path.
Description 2	Enter the menu ,menu selection, or IBM command.

## To menu travel via the Menu Word Search

1. Enter a word, phrase, or program on the command line.
2. Choose Menu Word Search (F8).

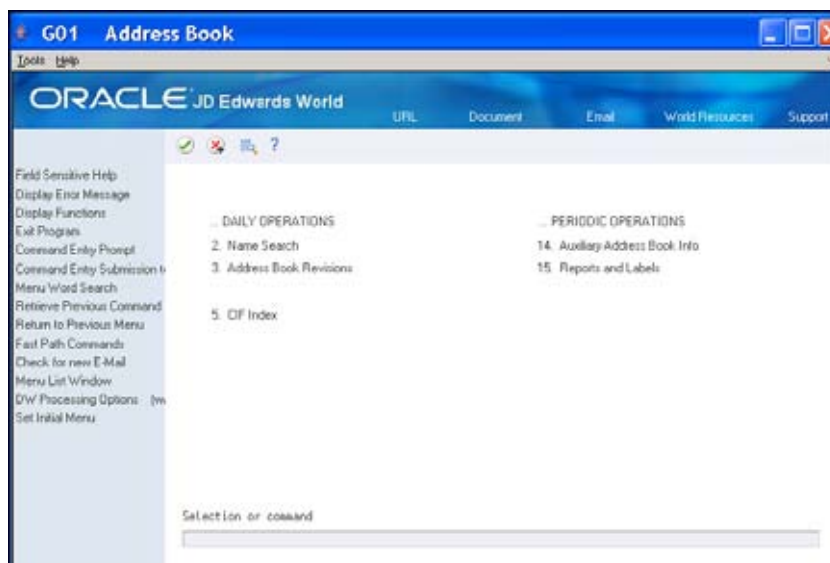
Menu Word Search displays with any selections that match the word, phrase, or program that you typed on the command line.

You can also choose Menu Word Search (F8) from any menu and when Menu Word Search displays, type a word, phrase, RPG program, or CL program in the Menu Word Search Question? field.

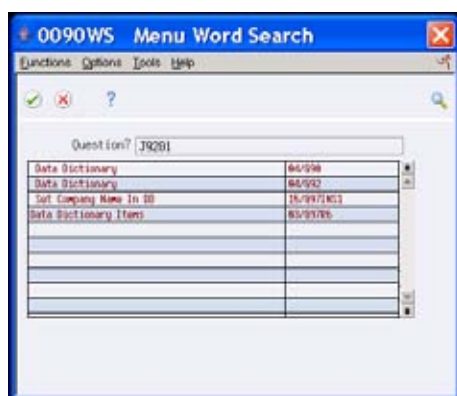
For example, if you enter ADDRESS in the Question? field, the system searches for any matches and displays them.



3. On Menu Word Search, choose the Address Book Revisions option and then choose Execute Menu Only (F4) from the Options menu. The Address Book (G01) menu displays.



You can also enter a CL program in the Menu Word Search Question? field, such as J9201 to search for the Data Dictionary job.



## To go back one menu at a time

Press F12 to go back one menu at a time. The system remembers the last 20 menus you used.

## To return to the sign-on menu

Leave the Selection line blank and press Enter on any menu to return to the Master Directory menu or initial Sign On menu.

You set the initial Sign On menu using the User Signon List Revisions program (P0093). On the Library List Control menu (G944), choose User Signon List Revisions. For each library list, you specify an initial Sign On menu in the Sign-on Menu field.

## What You Should Know About

### Menu Word Search

There are times when you need to perform a rebuild on the Menu Word Search. Perform the rebuild when you add:

- A new menu
- A menu selection that includes a custom CL program
- A new word to the Menu Synonym file

The Rebuilds program is on the Global Updates (G9642) menu. Once you perform a rebuild, the system submits the job to batch. When you submit this to batch, the system deletes the Menu Synonym file. Do this rebuild during off-peak hours to avoid inconveniencing users.



## Preparing to Display Functions and Options

This section contains the following:

- ## Displaying Menu-Level Functions

To display the menu-level Available Functions/Options screen

- 
- Display Functions**
- File Edit
- ✖
- Add Description Info
- Display Error Information
- Get Program
- Generate Entry Point
- Generate Entry Substitution to Entry
- Main Window Security
- Fetches Previous Generated Data to DB
- Fetches to Previous Memory
- Fetch Path Generated
- Show to new kernel
- Main List Window
- DW Processing Complete - (subfunction 0)
- Get Entry Memory

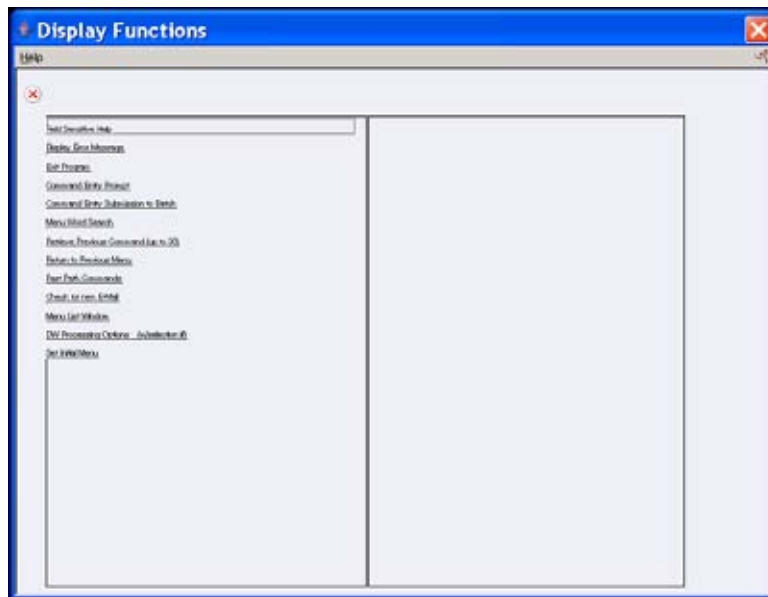
2. On Display Functions, you can perform any of the following:
  - Page up and page down to scroll to more functions.
  - Select the function or enter 4 in the Option field to the left of the function that you want to use.
  - Click Close or press F3 to exit from the screen without making a selection.

## Displaying Program-Level Functions and Options

Program-level functions are available. Each JD Edwards World screen has a unique set of available functions and options depending on the nature of that program.

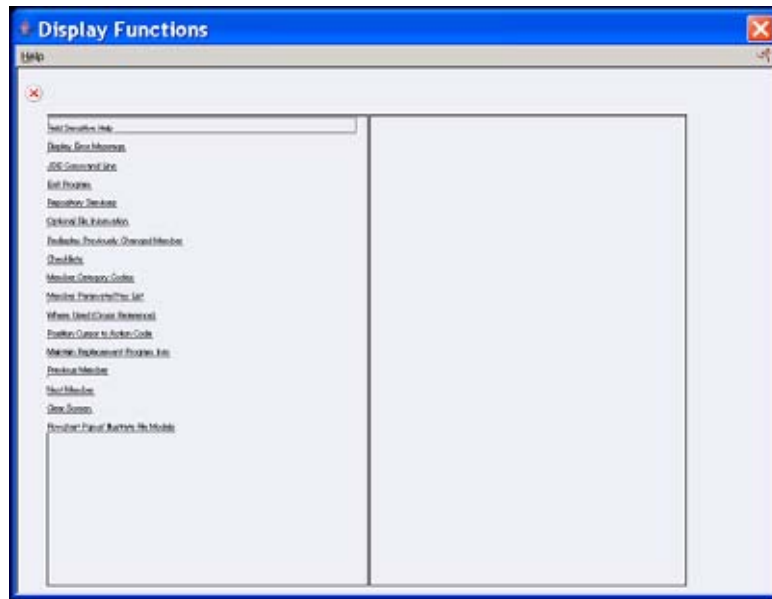
### To display the program-level Available Functions/Options window

1. From any JD Edwards World program screen, select Display Functions or press F24. The Available Functions/Options screen displays. This screen displays only the available function keys.



2. Page up and page down to scroll to more functions.
3. Select the function or enter 4 in the field to the left of the function that you want to use.
4. Press F3 to exit from the screen without making a selection.

Some programs, such as Software Versions Repository, have available options. Access the Software Versions Repository and press F1 in the option field to display the available options.







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# Understand Hidden Selections

## About Hidden Selections

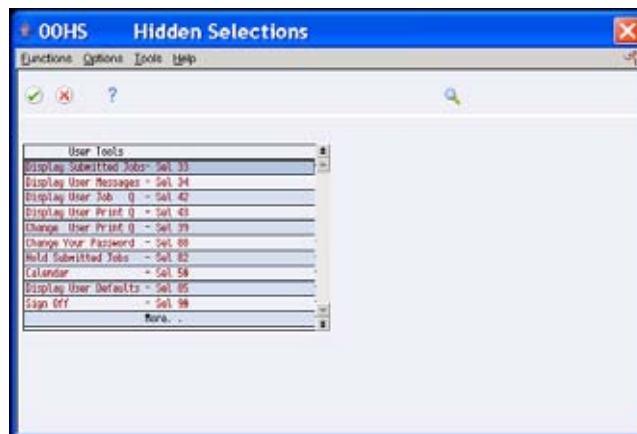
Every JD Edwards World menu displays up to 24 menu selections. These are typically selections unique to a system. Hidden menu selections let you perform certain functions regardless of the current menu. Hidden selections can:

- Display the menus for Advanced and Technical Operations for a particular application
- Perform special activities
- Access certain menus even if the system restricts direct menu traveling
- Access certain IBM commands without allowing access to the Command Entry Line

## Reviewing Hidden Selections

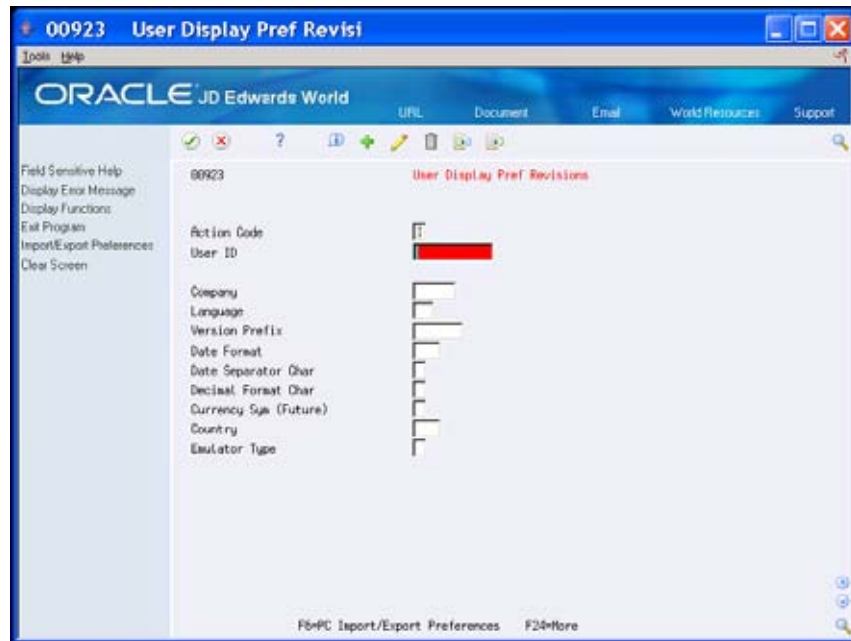
To review hidden selections

1. From any JD Edwards World menu, enter HS on the Command line. The Hidden Selections screen displays, listing the selection number for each function.



2. Select a hidden selection or enter 4 in the field to the left of the hidden selection that you want.

In this example, if you select Display User Defaults - Sel 85 or enter 4 in the field to the left of Display User Defaults - Sel 85, the User Display Pref Revisions screen displays.



## What You Should Know About

Hidden Selections	Description
<b>Types of Hidden Selections</b>	<p>There are three types of hidden selections:</p> <ul style="list-style-type: none"> <li>▪ User: Tools for facilitating daily operations</li> <li>▪ Operator: Tools for facilitating computer operations</li> <li>▪ Programmer: Tools for facilitating programming</li> </ul>

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## 3 Help Information



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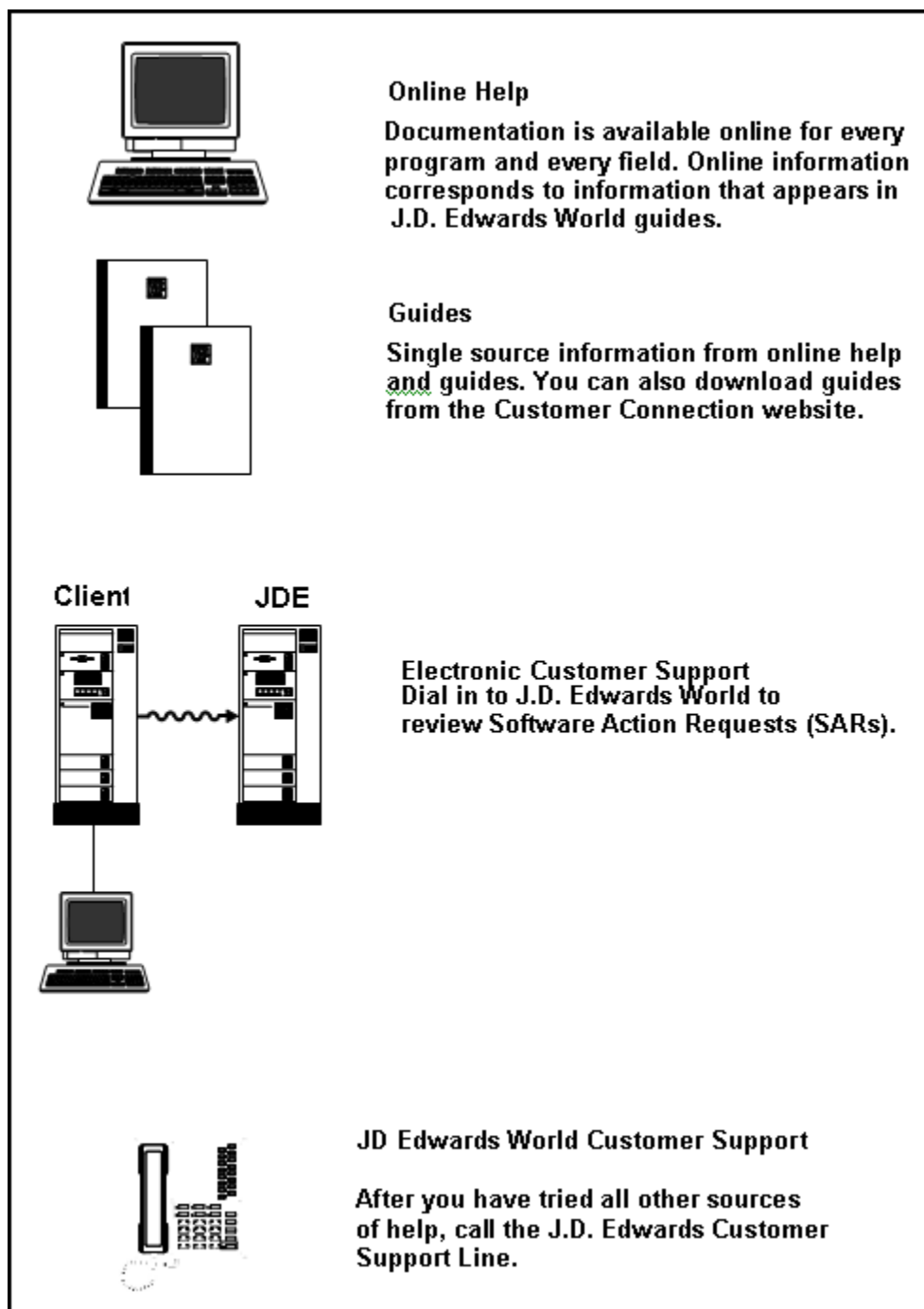
# Overview to Help Information

## Objectives

- To understand what types of help information are available
- To understand how to use the different types of help information

## About Help Information

There are several sources of help information for JD Edwards World software:



To become familiar with help information, complete the following:

- Locate help instructions
- Understand the Documentation Services menu
- Work with Electronic Customer Support
- Contact Response Line

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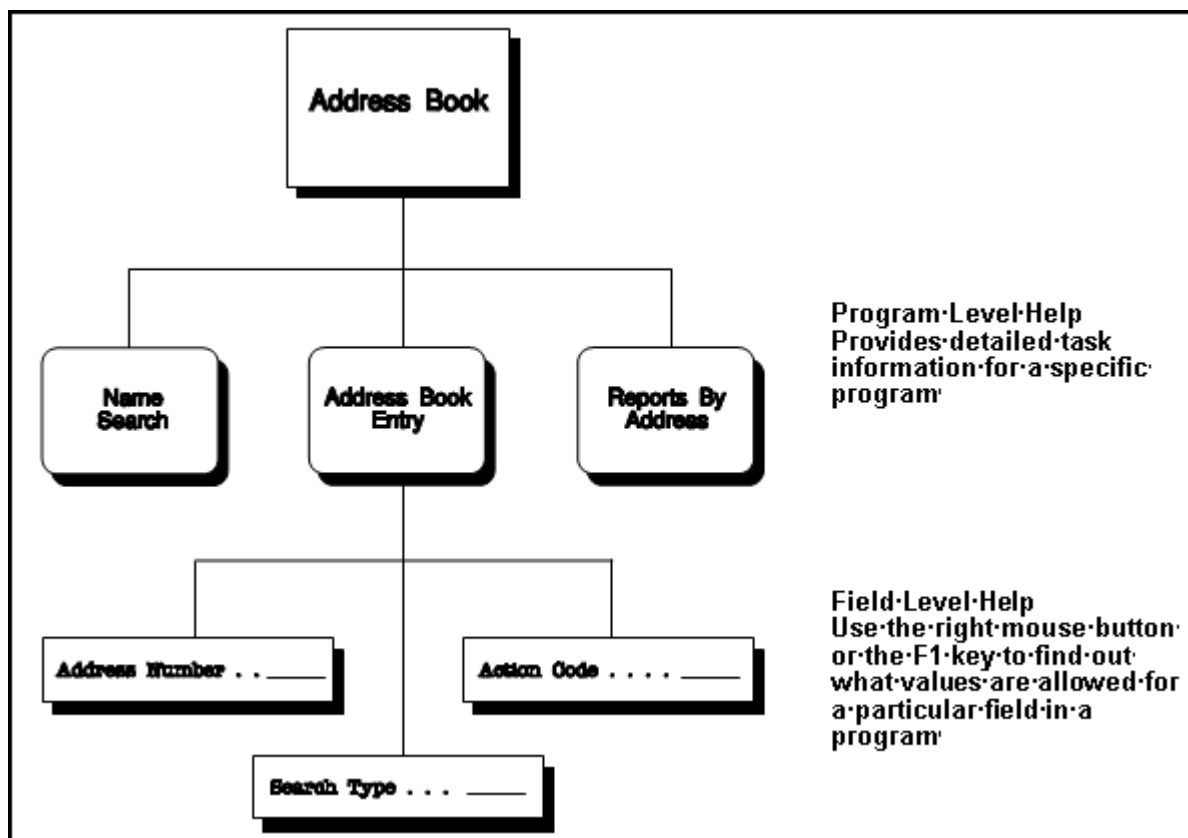
# Working with Online Help

## Review Online Help

This section contains the following:

- [Reviewing Online Program Help](#)
- [Reviewing Online Field Help](#)
- [Create User Defined Instructions for Program Help](#)

Online help instructions provide you with information you can use to solve problems while working with a program. The following graphic uses the Address Book system as a model to display the different levels of available online help.



## What Is Program Level Help?

Program Level Help provides detailed task instructions about individual programs. When you choose Help, the Help Task List screen displays a list of tasks that relate to the program you are in. From the Help Task List screen, access:

- Any help you have defined for the program
- The DREAM Writer version to print a range of help instructions
- The user-defined text associated with a task
- The input and output files
- The source code, if source code exists
- The program purpose

## What Is Field Level Help?

Press F1 on the field to see information related to specific fields. The system displays one of the following items, depending on the particular field:

- Field explanation
- List of valid values
- Search window

To use online help, complete the following tasks:

- Locate program help instructions
- Locate field help instructions

## Reviewing Online Program Help

Complete the following tasks:

- Access program level help
- Display user defined instructions
- Add user defined text
- Print program level help

## Accessing Program Level Help

Access the online help text for a program:

- From the Help Task List screen
- From the Skip To field
- From the Menu Word Search screen

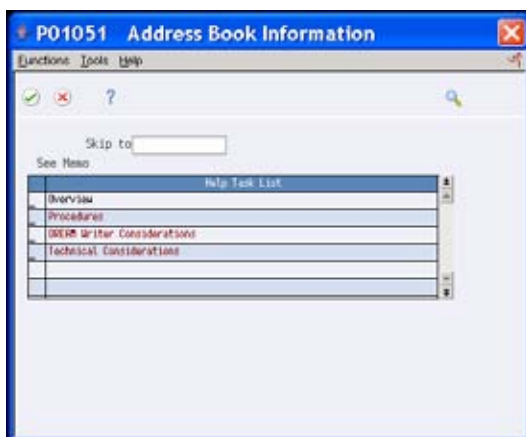
To access program level help from the Help Task List screen

1. From any menu or screen, perform one of the following:



- Click the help icon
- Hover over the menu option, right click and choose Help and then Application Help.
- On the command line, enter Help XX, replacing XX with a menu selection number.

The Help Task Window for that selection appears.



2. To display the help instructions for a task, select the topic or enter 1 next to the item. You can choose several topics to display at one time.



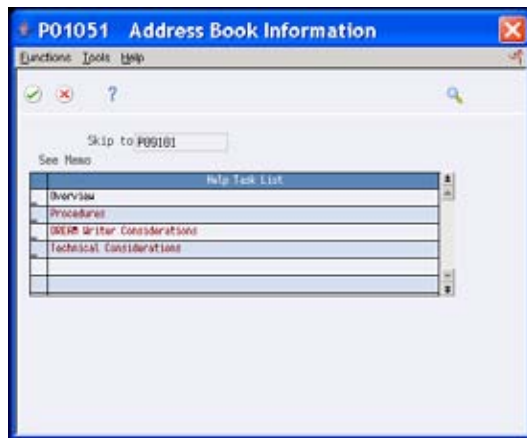
3. To scroll through the information, click the Page Up and Page Down icons. Press Enter to go to the next task.

## What You Should Know About

Function Exits	Description
<b>Navigation Bar</b>	You can use any selection on the navigation bar to perform commands or access other information that is also available using the function keys. For example, instead of pressing F3, you can select Exit Program (F3) from the navigation bar or instead of pressing F8 you can select Menu Word Search (F8).
<b>Function Keys</b>	<p>You can use the following function keys in the character-based presentation of JD Edwards World software:</p> <ul style="list-style-type: none"> <li>▪ F2 - Expanding the Display. To display a full screen version of a screen. Alternatively, you can use the Toggle Full/Half Screen function.</li> <li>▪ F 10 - Displaying Source Code. To display the source code. If you have an understanding of coded commands, the source code reveals the inner workings of a program</li> <li>▪ F 15 - Listing Input/Output Files. To access the Cross Reference screen for a list of the files defined by a program.</li> </ul>

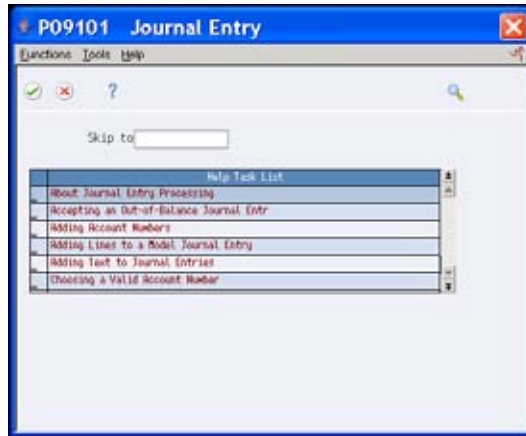
### To access program level help from the Skip To field

1. From the Help Task Window, position the cursor in the Skip To field.
2. Either enter the program ID or press F1 to identify and select a program ID.



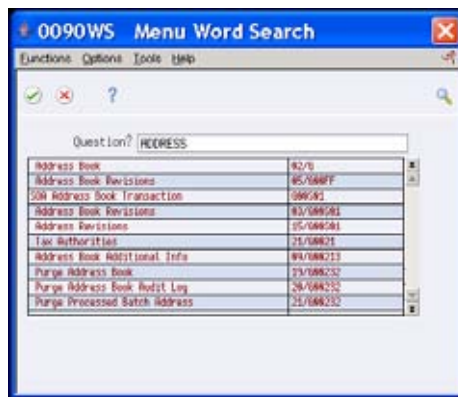
The Help Task Window displays the tasks associated with that program. For example, the tasks associated with P09101.

3. To display a task from the Help Task List for P09101, select a topic or enter 1 next to the item.



To access program level help from the Menu Word Search screen

1. On any menu, choose Menu Word Search (F8) to access the Menu Word Search screen.
2. Enter a search topic in the Question? field:



3. Select the help option or select an option from the Options menu.

## See Also

- *Working with Menu Traveling* for further information on using the Menu Word Search window.

## Displaying User Defined Instructions

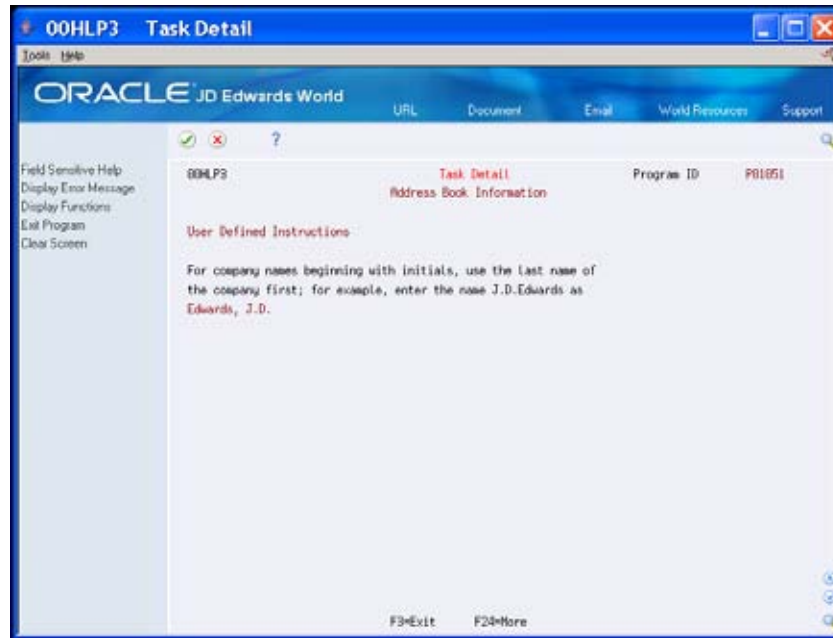
Depending on your version of JD Edwards World software, F5 displays below the Skip To field or User Defined Instructions is available on the Functions menu if you have written your own program-level instructions. You can access the instructions using the User Defined Instructions function in the Data Dictionary. The instructions you create are specific to your company or job responsibilities.

## See Also

- *Data Dictionary* for further information on using the User Defined Instructions function.

## To display user defined instructions

On the Help Task List window select User Defined Instructions from the Functions menu or press F5 to access User Defined Instructions.

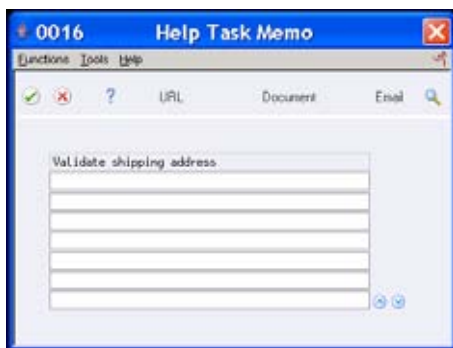


## Adding User Defined Text

You can add your own text for any current topic that displays in the Task List window. For example, attach a memo to explain brief details about the task. However, anyone can access and change the memos you attach to an item.

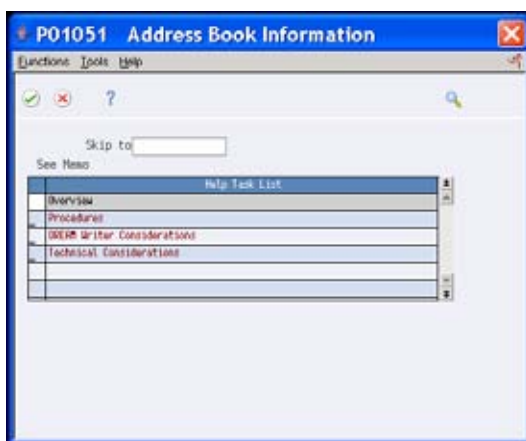
### To add user defined text

1. From any Help Task List, choose User Defined Text (F14) from the Functions menu.
2. Enter the memo information in the Help Task Memo window.  
A successful memo entry highlights the line of text.



3. Exit (F3) the Help Task Memo window.

The system highlights the line and displays “See Memo” in the Help Task List screen to indicate that a memo exists for the item.



## What You Should Know About

Help Task Memo Window	Description
<b>Memo Notes and Text Models</b>	<p>On the Help Task Memo window, you can:</p> <ul style="list-style-type: none"> <li>Enter up to 32,000 characters of notes on a single screen. The small text window holds 800 lines of text, 40 characters per line. The large screen holds 400 lines of text, 80 characters per line.</li> <li>Use this electronic note capability to accommodate brief reminders or messages about the field or screen. For more detailed help text, use the Data Dictionary Repository to create detailed Glossary entries for the specific data item.</li> <li>Change the size of a screen, choose Toggle Window Size (F2). The system opens a screen that is either 40 or 80 characters wide.</li> <li>Open the User information screen that displays details about the text entry on the screen. Choose Display User &amp; Date of Entry &amp; Update (F6) from the Functions menu. You can also open this window from the Text Model Selection screen by choosing Display User Information Window from the Options window. The system automatically records this information.</li> <li>Use the options on the Functions menu to insert (F8) and delete (F9) lines. Choose Delete this Entire Memo from the Functions menu to delete all of the text.</li> </ul>

## Files for User Defined Text

The system stores the data for user defined text in the following tables:

File Number	File Title	Type
F98163	Data Dictionary Generic Text Key Index File	(Header)
F9816	Data Dictionary Generic Text File	(Detail)
F98163LA	DD Generic Text Key Index File - LF by Key Serial Number	Logical view over F9816/F98163

The Keys in the F98163 file relate to the Category Codes in the Help Instructions Master File (F98HELP) as follows:

Window Application	Composite Key	Serial Number
*TASK-MEMO	P4311 HELP110	90,714
*TASK-MEMO	P4311 HELP5033	90,715

Window Application	Composite Key	Serial Number
*TASK-MEMO	P4311 HELP5015	90,718

The following are categories in F98HELP – Production Help Master for the Purchase Order Entry – Detail program (P4311). (\* indicates additional user text.)

Category	Description
HELP110	Overview *
HELP120	Procedures
HELP160	Multi-Currency
HELP180	Technical Considerations
HELP5001	About Purchase Order Entry
HELP5002	About Rebate Processing
HELP5003	About Special Orders Processing
HELP5004	Adding a Freeze Code to a Purchase Order
HELP5005	Assigning Agreements Manually
HELP5006	Creating Change Orders
HELP5007	Distributing an Expense to Multiple Accounts
HELP5008	Duplicating a Purchase Order
HELP5009	Duplicating a Requisition to Create a Purchase Ord
HELP5010	Entering a Kit on a Detail Line
HELP5011	Entering Blanket Orders
HELP5012	Entering Detail Lines by Account Number
HELP5013	Entering Detail Lines by Item Number
HELP5014	Entering Discount Terms for a Detail Line
HELP5015	Entering Items for which to Request Quotes *
HELP5016	Entering Items Using Item Search
HELP5017	Entering Items Using Order Templates
HELP5018	Entering Items Using Supplier Catalogs
HELP5019	Entering Purchase Order Detail Information
HELP5020	Entering Purchase Order Holds
HELP5021	Entering Reporting Codes for a Detail Line

Category	Description
HELP5022	Entering Requisitions
HELP5023	Entering Substitute or Replacement Items
HELP5024	Entering Suppliers to Provide Quotes
HELP5025	Entering Tax Information for a Detail Line
HELP5026	Printing Purchase Orders
HELP5027	Releasing Blanket Orders during Purchase Order Ent
HELP5028	Setting Up Purchasing Commitments
HELP5029	Understanding Budget Checking
HELP5030	What You Should Know About Processing Options
HELP5031	Working with Blanket Orders
HELP5032	Working with Change Orders
HELP5033	Working with Commitments and Encumbrances for Purc *
HELP5034	Working with Quote Orders
HELP5035	Working with Requisitions
HELP5036	PC Import
HELP5037	Summary of Recent Enhancements

## Printing Program Level Help

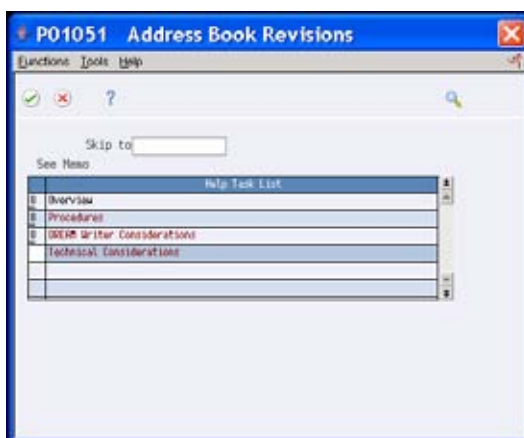
If you frequently use a certain program feature, it is useful to have a printed copy of help instructions on hand for quick reference. The Help Task List screen features a print option for specific tasks.

### To print program level help instructions

1. From any Help Task List, click the Help icon or press the Help key to access the Help Task List.
2. To print a task, choose Print Task from the Functions menu or enter 8 in the Option field next to the task line.

Alternatively, you can press F21 to access DREAM Writer for further printing options.





## What You Should Know About

Printing Help Instructions	Description
<b>Printing</b>	<ul style="list-style-type: none"> <li>You can enter up to 10 tasks to print at one time from the Help Task window.</li> <li>You can also access the DREAM Writer list when you select Instructions from the Documentation Services menu (G91).</li> </ul>

## See Also

- DREAM Writer*
- Create Your Own Version in Common Foundation* for additional information on DREAM Writer version processing

## Reviewing Online Field Help

To understand field level help, complete the following tasks:

- Access field level help
- Display field explanation help
- Display valid values
- Search for records

## Accessing Field level help

To access field level help

- On any JD Edwards World screen, position the cursor in a field.
- Click the Help icon (F1) to display the help information.

The system displays one of the following, depending on the particular field:

- Field explanation
- List of valid values
- Search window

## Displaying Field Explanation Help

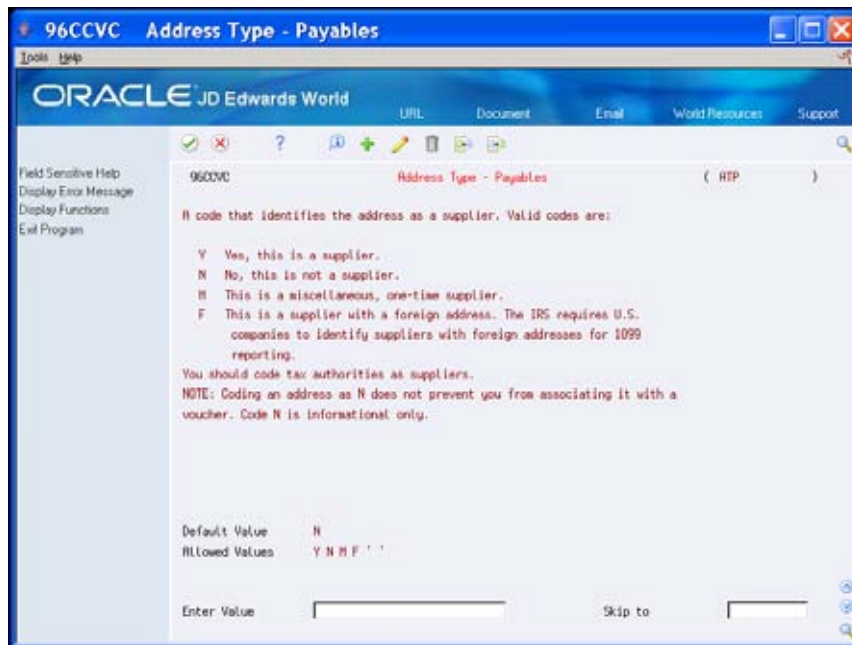
Field explanation help provides:

- A description of the purpose of the field
- A list of allowed values for a field
- The default value if the field is left blank, where applicable

### To display field explanation help

For example, on Address Book Revisions:

1. Position the cursor in the following field:
  - Payables Y/N/M
2. Click the Help icon (F1) to display the information.



3. To return a specific value to the Payables Y/N/M field on the Address Book Revisions screen, enter a valid value in the Enter Value field.

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**Note:** The field explanation can be either generic — the glossary definition is shared by other JD Edwards World systems — or specific to a system. Program specific information displays for those field definitions that are unique to a screen.

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## Displaying Valid Values

Use valid values to customize the information on a screen. The User Defined Codes screen lists the valid values available for a particular field.

### To display valid values

For example, on Address Book Revisions:

1. Position the cursor in the following field:
  - Search Type
2. Click Field Sensitive Help (F1) to display the information.



3. Select a specific value or enter 4 in the Option field next to the item.

For a description of the UDC, choose Show Fields Glossary (F9) from the Functions menu to access the Glossary window.

## See Also

- *Customize Your Data* in *Common Foundation* for more information on user defined codes

## Searching for Records in the Address Book

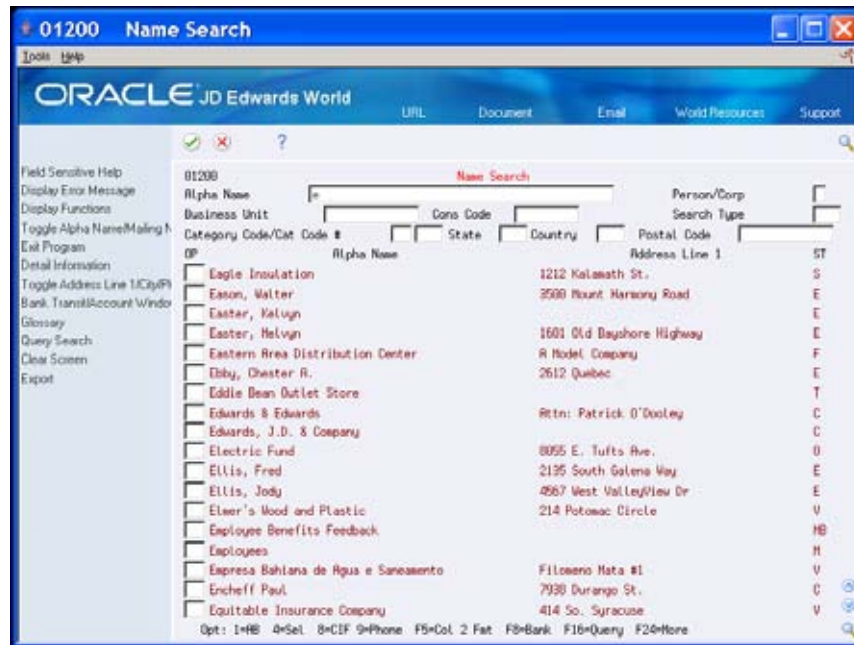
### To search for a record in the Address Book

From any program, for example, on Address Book Revisions:

1. Position the cursor in the Address Number field.
2. Click Field Sensitive Help (F1) to access the Name Search screen.
3. In the Alpha Name field, do one of the following:
  - Enter all or part of a name in the Alpha Name field.
  - Enter a valid value in the Search Type field.

- Enter a combination of Alpha Name and Search Type information.
- Type the search criteria and choose Query Search (F16).

If any names match your search they display in the screen.



4. Enter 4 in the Option field next to the name you want to return to the program field.

Position the cursor in the option field and choose Glossary (F9) to access the Data Dictionary Glossary window for a description of a field.

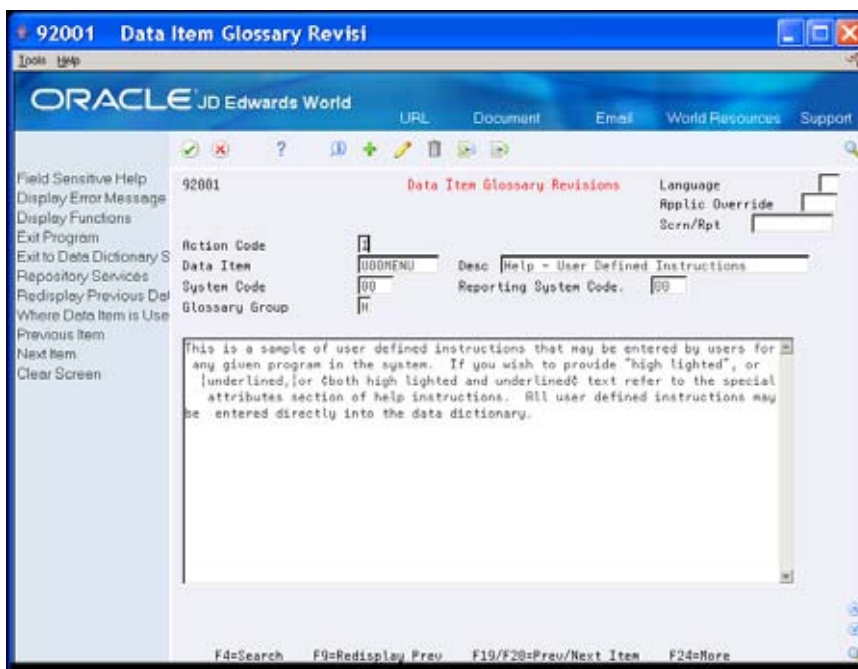
## What You Should Know About

Error Messages and Printing	Description
<b>Displaying Error Messages</b>	If at any time an error is made while entering information into a field, choose Display Error Message (F7) to display a description of the error. To display further information about the field, enter 4 in the Option field.
<b>Printing Field Information</b>	<ul style="list-style-type: none"> <li>▪ To print information about a specific screen, use Video Illustrations from the Documentation Services menu (G91).</li> <li>▪ To print information about all fields in a system, use Glossary of Terms from the same menu.</li> </ul>

## Create User Defined Instructions for Program Help

You can create help text and attach it to any program using the Data Dictionary. User Defined Instructions (F5) is available only after you perform these steps.

1. On the command line, enter DD.
2. On Data Dictionary, locate the U00MENU menu.



3. On Data Item Glossary Revisions, enter the program number in the Data Item field.  
Substitute the P for a U. For example, enter U09101 if the program ID is P09101.
4. Enter the text.
5. On Data Item Glossary Revisions, locate the program ID record (beginning with a U) to verify that the system accepts the program.
6. Click the Help icon (F5) to display the Help Task List window.

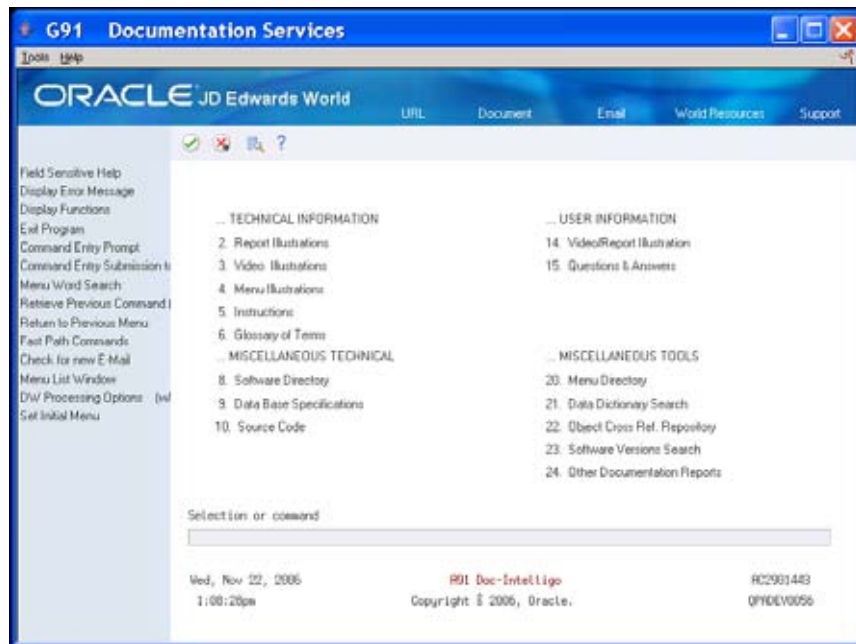


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# Understand Documentation Services

## About the Documentation Services Menu

The following menu accesses additional documentation you may find useful.



## What You Should Know About

Illustrations	Description
<b>Report Illustrations</b>	Prints an illustration of reports in the software. The system requires the JDFSRC library.
<b>Video Illustrations</b>	Prints an illustration of videos in the software. The system requires the JDFSRC library.
<b>Menu Illustrations</b>	Prints all menus. Each page represents one menu and prints how the menu looks to the user, the job to execute for each option, and other pertinent information.
<b>Instructions</b>	Prints any or all help instructions for each program.

Illustrations	Description
<b>Glossary of Terms</b>	Prints the glossary of terms from the Data Dictionary. Set it up to print by system, glossary group, or any other criteria you might require.
<b>Software Directory</b>	Prints directory of software. You may print information by system code, member name or function code.
<b>Database Specifications</b>	Prints database specifications for any or all files in a system. <ul style="list-style-type: none"><li>▪ The file name, format name, field description, field name, field length size, type of field</li><li>▪ The system requires the JDFSRC library</li></ul>
<b>Source Code</b>	A processing option lets you print nesting procedures within the program. The system requires the JDFSRC library.



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# Contact Response Line

## Contacting JD Edwards World Customer Support

If you are unable to resolve errors, you can call the JD Edwards World Customer Support for assistance. Customers subscribe to the support services by paying an annual fee.

### JD Edwards World Customer Support

JD Edwards World maintains three response lines:

- For service to North, Central, and South America, call 1-800-289-2999
- For more information about the other response lines, access the Oracle Customer Connection. Under Find What You Need, select Global Customer Care Directory.

### What Type of Questions Does JD Edwards World Customer Support Answer?

JD Edwards World consultants can assist in resolving issues in the standard JD Edwards World software, including:

- Clarification of program functions
- Questions regarding system capabilities and features
- Understanding error messages
- Questions related to system documentation and reference guides
- Assistance in researching suspected program problems
- Software Action Request (SAR) status inquiries
- Clarification of instructions for the install, reinstall, and software enhancement processes
- Assistance in ordering software enhancements
- Coordination with product development for product enhancements and corrections

### Additional Help Information

Consultants in our regional offices and business partners are available to help you with the following issues:

- Setup questions

- Training
- Custom modifications
- File conversion questions
- Balancing and integrity issue resolution

## **Before Calling**

Have you tried to find the answer using:

- Training materials
- Online help
- User guides

## **What Happens When You Contact JD Edwards World Customer Support?**

When you contact JD Edwards World Customer Support, your call is logged into the call tracking system.

Tell the Client Services Coordinator or Product Consultant:

- Your client number
- Your first and last name
- The system about which you are calling, such as:
  - Program ID (P01051 for example)
  - System Code (01 for Address Book)
  - Menu (G01 for the Address Book menu)
- Your phone number and extension
- Whether you consider the call urgent

If a Product Consultant is readily available, your call is transferred immediately. However, if there is a high volume of calls, a consultant will return your call as soon as possible.

For prompt resolution, be prepared to provide the following information available for the Product Consultant:

- Your client number
- Your call number, if already assigned
- Which software release you are using
- What cumulative updates have been loaded
- The error message text and number, if applicable
- Whether this is the first time you have attempted this process
- Whether any software has been customized





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## 4 System Naming Conventions



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# Overview to System Naming Conventions

## Objectives

- To understand how to name repository members
- To understand how to name menus
- To understand what the system codes are
- To understand the major technical files and how the system groups them
- To understand the Software Versions Repository
- To understand how to find the location of all members

## About the System Naming Conventions

Think what it would be like if there were no system naming conventions. It would be chaos for you and the database. You would not be able to look at a menu name and know it's a menu. The database could overwrite a file or program with another file with the same name.

It is important to have a standardized naming convention for repository members and menus. Every file, report, program, or menu must have its own unique name.

To understand the naming conventions, complete the following tasks:

- Understand object naming conventions
- Understand menu naming conventions
- Review the major technical files
- Work with the Software Versions Repository





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# Understand Object Naming Conventions

## About Object Naming Conventions

It is important to understand how JD Edwards World names its files, programs, subroutines, and servers. You should understand the following:

- How you name objects
- How you name files

This section contains the following:

- [The Naming Conventions for Objects](#)
- [The Naming Conventions for Files](#)
- [The JD Edwards World System Codes](#)
- [Examples of Program and File Names](#)

## The Naming Conventions for Objects

Use the following as your guide when naming objects. For a complete list of system codes, see User Defined Codes, system 98, record type SY.

First digit – Component	Second and third digits - System Code	Fourth, Fifth, and Sixth Digits - Group Type
C - Common subroutine	00 – World Foundation Environment	000 – 099 File maintenance
I – Data Structure	01 – Address Book	100 – 199 Transaction processing
J - CL program	03 – Accounts Receivable	200 – 299 Inquiry only
P - RPG program	55 – Reserved for clients	300 – 399 Input registers and journals
R – Report		400 – 499 Operating reports
S - Special form		500 – 599 Special purpose reports
T - Temporary work files		600 – 799 Standard management reports
V - Video screen display file		800 – 999 Housekeeping
X - Scrub and Edit Server		DS – Data structure
XF - Input/Output File Server		Other – Window designations
XS - Input only/Caching Server		

The CL program, RPG program and Display/Printer file may have identical names with different prefixes. For example: J01051, P01051, V01051 (Address Book Revisions)

## The Naming Conventions for Files

The following chart lists the naming conventions for files:

First digit – Component	Second and third digits – System code	Fourth and Fifth digits – Group type	*Sixth through Tenth digits – Identifying Suffixes
F – Data file (physical or logical)	00 – World Foundation Environment 01 – Address Book 03 – Accounts Receivable	01 – Master 02 – Balance 1X - Transaction	WF – Work file LA thru LZ – Logical file JA thru JZ – Join logical file Version ID – 3 digit number appended to saved DREAM Writer logical file name

\* These digits differentiate component versions. For example, programs that perform similar functions but vary distinctly in specific processing.

The following identifies the names for different types of programs and files.

Programs and Files	Description
Maintenance program	Occasionally, the maintenance program for a file has the same name with a different prefix.  For example, F9220 is P9220 or F9601 is P9601.
Logical files	For logical files over one physical file, the logical file has the same name as the physical followed by an L, followed by sequential letters starting with A.  For example, F0101 has logicals F0101LA, F0101LB, F0101LC, and F0101LD.
Join logical files	Join logical files have the same name as the principal based-on file, a suffix of J followed by A thru Z.  For example, the system names the join of F0006 and F0911 as F0006JA
Temporary files	Batch jobs use T files doing a CRTDUPOBJ. The job then removes the object after completion. <ul style="list-style-type: none"><li>▪ Usually Physical Files</li><li>▪ Begin with T</li><li>▪ Found in JDFOBJ</li></ul>

Programs and Files	Description
Dynamic work files	<p>Dynamic work files are usually FASTR processing requirements. Dynamic work files create and delete after the job is complete.</p> <ul style="list-style-type: none"> <li>▪ Usually logical files</li> <li>▪ Have same name as program</li> </ul>

## The JD Edwards World System Codes

The system code follows the G in the menu name. Shown below are the system codes for the standard AS/400 systems:

System Number	System
00	General Back Office
01	Address Book
02	Electronic Mail
03	Accounts Receivable
03B	Enhanced Accounts Receivable
03C	Customer Issue Tracking
04	Accounts Payable
05	Standalone Time Accounting
06	Old Payroll
07	New Payroll
08	Human Resources
08A	Application Tracking
08B	Benefits Administration
08C	Canadian Specific HR Functions
08H	Health and Safety
08P	Position Control
08R	Requisitions
08U	US Specific HR Functions
08W	Wage and Salary
09	General Accounting

System Number	System
09E	Expense Reimbursement Reporting System Only
10	Financial Reporting
10C	Multi-Site Consolidations
11	Foreign Currency/Cash Basis
11C	Cash Basis Accounting
12	Fixed Assets
13	Equipment/Plant Management
14	Modeling, Planning, and Budgeting
15	Commercial Property Management
16	Residential Property Management
17	Customer Service Management
17A	Ariba Integration Reporting Purposes Only
17C	Call Management Reporting Purposes Only
18	Resource Scheduling Reporting Purposes Only
19	Utility CIS
20	Energy Data Base
21	Lease Management
22	Production System
23	Revenue Distribution
24	Contracts
25	Joint Interest Billing
26	Gas Balancing
27	Investor Services
28	Projects on Hold – Energy
29	AFE Accounting
30	Product Data Management
30A	Product Costing Reporting Only

<b>System Number</b>	<b>System</b>
31	Shop Floor Control
31A	Manufacturing Accounting
3110	Process Control
32	Configuration Processing
32C	Custom Works
33	Capacity Requirements Planning
34	DRP/MPS/MRP
34A	Advanced Planning & Scheduling
35	Enterprise Facility Planning
36	Forecasting
37	Quality Management
38	Distribution Contracts
39	Bulk Stock Control
40	Inventory/OP Base
4010	Advanced Price Adjustments
41	Inventory Management
41B	Bulk Stock Control
42	Sales Order Processing
42A	Sales Force Automation Reporting Purposes Only
42B	Enterprise One Sales Order Entry
42E	ECS Sales Order Processing
43	Purchase Order Processing
44	Contract Administration
44H	Homebuilder Management
4401	Homebuilder Management
45	Advanced Price Analysis
46	Warehouse Management
47	Electronic Data Interchange

System Number	System
48	Work Order Processing
48S	Service Billing
49	Transportation
50	Job Cost Accounting
51	Job Cost Accounting
52	Job Cost Billing
53	Change Management
55-59	Reserved for Clients
60-69	Reserved for JD Edwards World Custom
70	Multi-National Products
71	Client Server Applications
72	CS - WorldVision
73	M&D Complimentary Products
74	EMEA Localizations
74G	Greece
74H	Hungary
74I	Ireland
74L	Portugal
74N	Nordics
74P	Poland
74R	CIBS
74S	Spain
74T	Turkey
74Z	Czech Republic
75	Asia Pacific Localizations
75H	Thailand
75I	India
75K	South Korea
7T	Taiwan

<b>System Number</b>	<b>System</b>
76	Latin American Localization
76A	Argentinean Localization
76C	Columbia
76H	Chile
77	Canadian Payroll
77Y	Canadian Payroll Year End Programs Reporting System Only
78	OBSOLETE CS Travel Expense Management
79	OBSOLETE Foreign Translation
80	Business Intelligence
81	DREAM Writer
82	World Writer
83	Finance Report Writer-FASTR
84	Distributed Data Processing
85	Custom Programming
86	Foreign Language Translation
87	JD Edwards World Internal
88	Cautious Purge System
89	Conversion Programs
91	Documentation
92	Computer Assisted Design
93	Computer Assisted Programming
94	Security Officer
95	Unattended Night Operations
96	Computer Operations
97	Software Load & Install
98	Technical Aids
98e	Electronic Burst & Bind
98FT	Form Type

System Number	System
98SA	Sample Application
99	Technical Aids – Internal
99D	Technical Tools – DASD Sizer Reporting Purposes Only
99M	Technical Tools - Masters/Update Reporting Purposes Only

## Examples of Program and File Names

The following shows examples of the naming conventions for files, screens, and programs:

Naming Conventions	Description
Data Files	Account Master File Component (file) F System Code (General Accounting) 09 Component Group Type (master) 01 Account Master Alternate Logical Component (file) F System Code (General Accounting) 09 Component Group Type (master) 01 Version Identification (logical) LA
Videos (Screens)	Component (video) V System Code (General Accounting) 09 Component Group Type (file maintenance) 01
RPG Programs	Component (RPG program) P System Code (General Accounting) 09 Component Group Type (file maintenance) 01
CL Programs	Component (CL program) J System Code (General Accounting) 09 Component Group Type (file maintenance) 01



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# Understand Menu Naming Conventions

## About Menu Naming Conventions

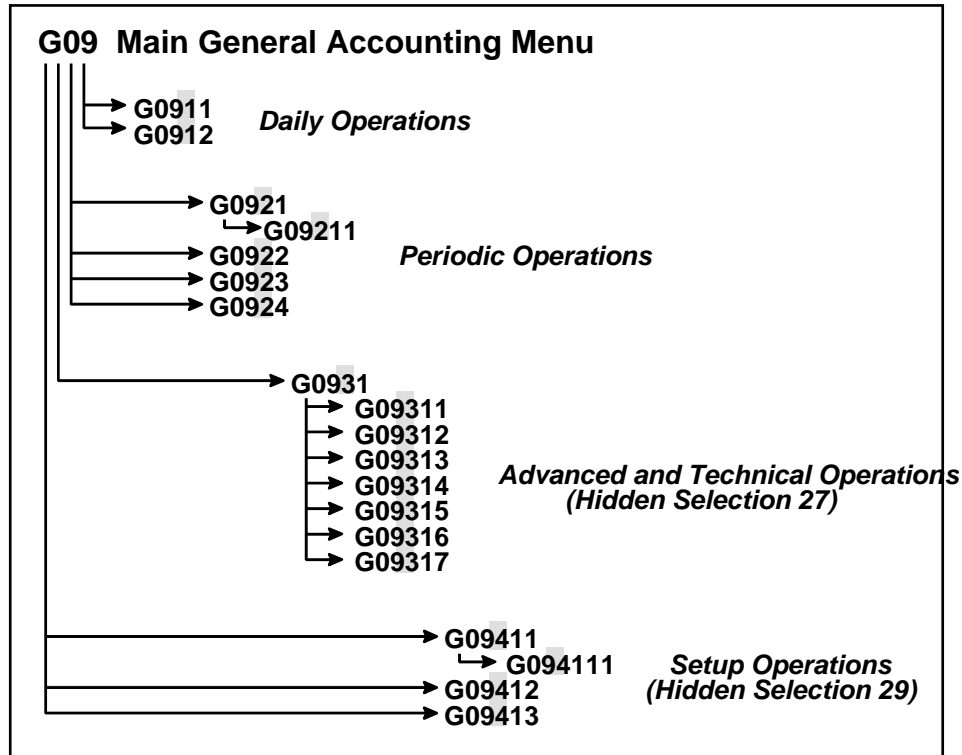
As with programs and files, menus have their own naming standard. JD Edwards World prefaces the menus with the letter G followed by the system number.

For example, G0911 is the Journal Entry, Reports, and Inquiries menu.



## How Does JD Edwards World Number the Menus?

The numbering scheme for the 'G' menus reflects the level-of-complexity format, which is illustrated below.



Shaded areas in the menu names indicate the level of menu complexity. For example, menu name G092xx indicates:

Menu Level	Description
G	G menu
09	General Accounting
2	Periodic operations menu
xx	Differentiates the menu from other periodic operations menus

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# Review the Major Technical Files

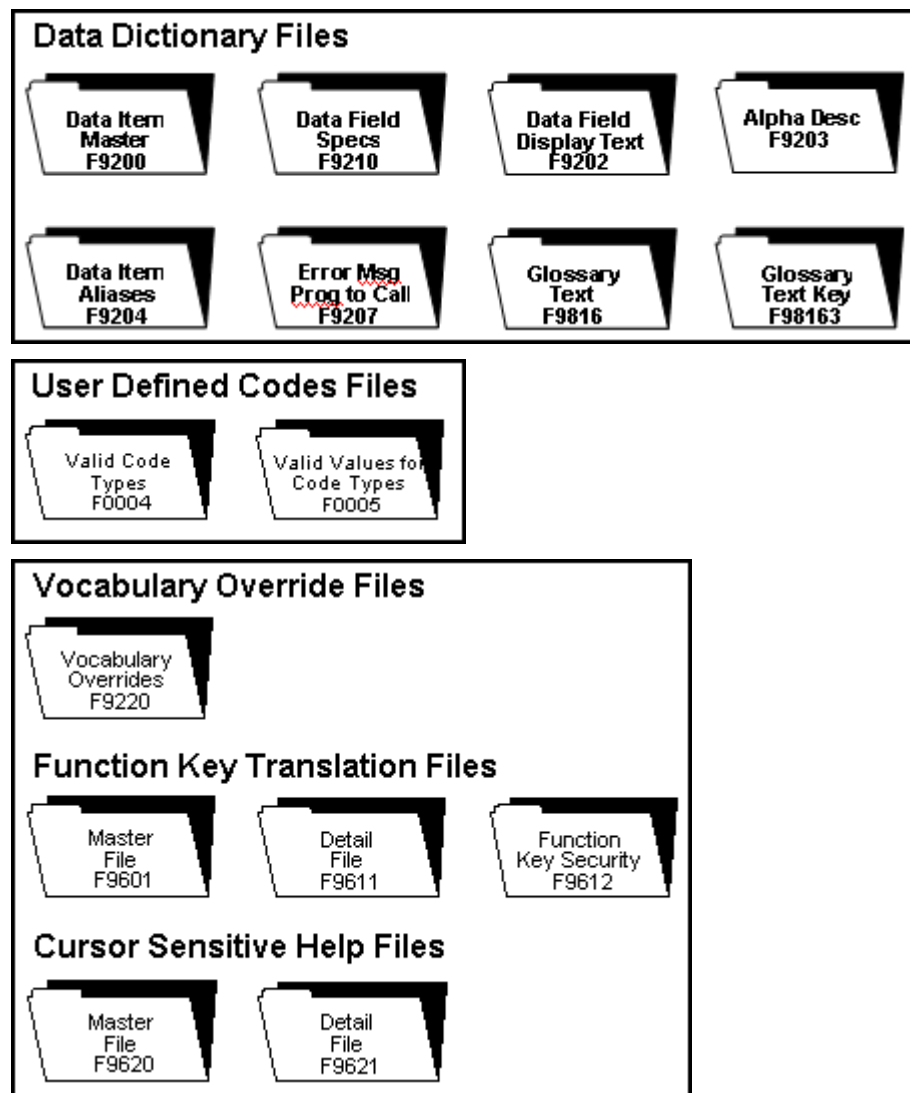
## Reviewing the Major Technical Files

The following illustrates the major master technical files that you should become familiar with.

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**Note:** The box indicates that those files must be in the same library.

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### Software Versions Repository Files

Master  
File  
F9801

Detail  
File  
F9802

### User Control Files

User Library  
List Control  
F0092

User Library  
List Member  
F0093

Library List  
Master  
F0094

User Display  
Preferences  
F00921

### Pre-Open Files

Pre-Open  
File F0095

### Generic Messages/Rates Files

Types  
F0019

Records  
F00191

Detail  
F00192

### Generic Text Files

Generic  
Text  
F0016

Window  
Definition  
F00161


Key  
Definition  
F00162

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# Work with the Software Versions Repository

## About the Software Versions Repository (SVR)

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Computer Assisted Design</b> From Computer Assisted Design (G92), choose <b>Software Versions Repository</b>
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The SVR indicates what environments a requested member is located in and whether the environment is production or development. The SVR is used extensively for documentation and plays an important role in the JD Edwards World Design and Development tools.

- The Software Versions Repository Master (F9801) file is a master directory of all programs, files, screens, reports and copy modules.
- The Software Versions Repository Detail (F9802) file stores the member locations for each member master record.

The SVR is the natural starting point for all programming and software inquiry functions. It provides access to all programming tools.

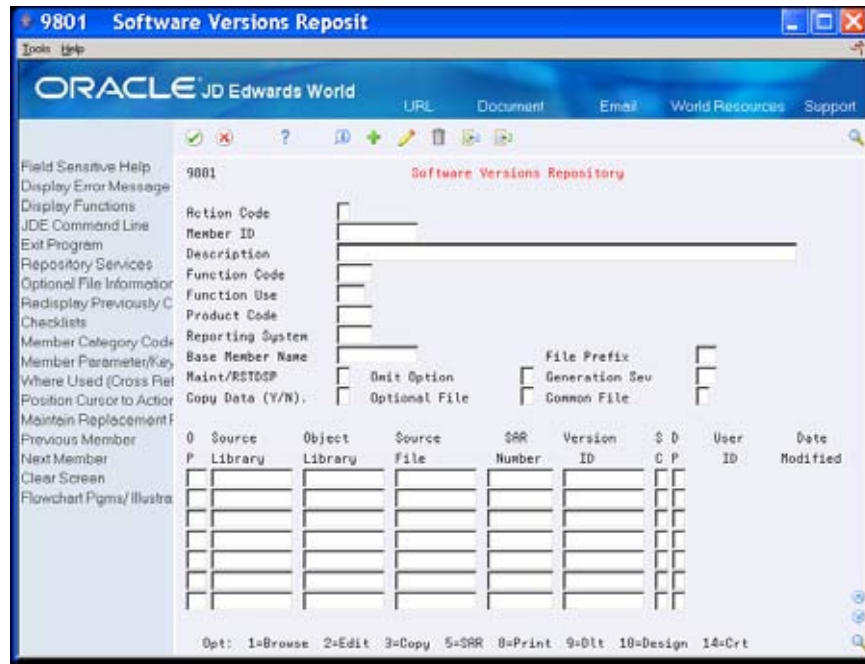
This section contains the following:

- [About the SVR Screen](#)
- [Working with Repository Services](#)
- [Accessing Cross Reference](#)

## About the SVR Screen

The upper fields of SVR identify the member and display the associated configuration items. The system stores this information in the Software Versions Repository Master (F9801) file.

The lower fields of SVR list the libraries in which the member is maintained. The system stores this information in the Software Versions Repository Detail (F9802) file.



Field	Explanation
Member ID	<p>The identification such as program number, table number, and report number that is assigned to an element of software.</p> <p><i>Screen-specific information</i></p> <p>The source file containing the source member. At JD Edwards World software, three source files reside inside the JDFSRC library.</p> <p>They are:</p> <ul style="list-style-type: none"> <li>JDECPY for copy modules</li> <li>JDESRC for other source code</li> <li>F98CRTCMD for precompiler commands</li> </ul>
Description	<p>The description of a record in the Software Versions Repository file. The member description is consistent with the base member description.</p>
Function Code	<p>Designates the type of object being defined. See User Defined Codes, system code '98', record type 'FN' for a list of valid values.</p>
Function Use	<p>Designates the use of the object. For example, the object may be used to create a program, a master file, or a transaction journal.</p> <p><i>Screen-specific information</i></p> <p>Indicates how the member is being used.</p>

Field	Explanation
System Code	<p>A user defined code (98/SY) that identifies a JD Edwards World system.</p> <p><i>Screen-specific information</i></p> <p>Designates the system number associated with the member. The configuration of installation media and the install process itself are driven by this install system code. Use F1 in the field to view valid codes.</p>
Reporting System	<p>A code that designates the system number for reporting and jargon purposes.</p> <p>See UDC 98/SY.</p>
Base Member Name	<p>The RPG name associated with the particular object. For data files, enter the based on physical file. For physical and logical files, the name is the same as the physical file name. For join files, use the name of one of the physical files. For file servers the Base Member is always X98SRV with an install system code of 98.</p> <p><i>Screen-specific information</i></p> <p>This field simply allows for logical grouping of members.</p> <p>For screens, reports, RPG programs, and CL jobs, this name is usually the RPG program name associated with a particular member.</p> <p>For logical files, this name is the physical file upon which it is based and is required.</p>
File Prefix	<p>A prefix associated with a particular system. The prefix is placed before the data dictionary data item name to give the field a unique name across J.D. Edward's World systems.</p>
Maint/RSTDSP	<p>A designation of the type of maintenance on a logical view. These codes are as follows:</p> <p>0     No maintenance; or the logical is created dynamically</p> <p>1     Immediate maintenance</p> <p>2     Delayed maintenance -- USE WITH CAUTION</p> <p>Also used for RSTDSP and DFRWRT on Display Files</p> <p>1     RSTDSP = *NO -- Use with OVERLAY. Do not use with PUTOVR/OVRDTA DFRWRT = *YES</p> <p>A     RSTDSP = *NO -- Same as above DFRWRT = *NO</p> <p>B     RSTDSP = *YES DFRWRT = *NO</p> <p>S     For Compiling SQL RPG and PLI programs</p>

Field	Explanation
Omit Option	Designates records in Software Versions Repository file which are not included on new releases. These codes are as follows:  H     Held from all releases X     Omit from all releases S     Omit Source from all releases O     Omit Execution Object from all releases
Generation Sev	Allows you to override the error severity level that determines when a compile will be terminated without completion. For example, if you enter 20, the compile will complete normally even though you have received errors of severity 19 or lower. If left blank, the command default is used for the type of program being compiled.
Copy Data (Y/N)	Indicates if a file and its data is copied into production. A value of N moves the file without data. When creating a production data library from JDFDATA, this field is used primarily by program P98102, Create Production Library.
Optional File	Valid codes are:  Y     Designates a file as an Optional Data File if there are some situations where the file may not be needed at a client installation. The explanation of these situations can be found in the Generic Rate/Message information for that file for Generic Rate/Message Type 96/OF. All of these files that exist in a specified library can be listed in the Optional File Report on menu G9645.  O     Designates that the file is designated for omission. Examples are compile files or special files like JD Edwards World User Profiles file.  <i>Screen-specific information</i>  Designates if the file may not be needed at a client installation. The explanation of these situations can be found in the Generic Rate/Message information for that file for Generic Rate/Message Type 96/OF. All of these files that exist in a specified library can be listed in the Optional File Report on menu G9645.
Common File	A file with a value of Y copied into the user's designated common library when the Create User Production Library job, P98102, is run.

## What are the Navigation Functions?

The following functions facilitate navigating within the SVR.



## Command Line

To display an IBM command line on a screen that currently does not display one, choose JD Edwards World Command Line (F2).

## Repository Services

To display information about repository services, choose Repository Services (F6).

## Optional File Information

To access a listing of optional files for a specific system, choose Optional File Information (F8).

## Automatic Reinquiry

Once the system accepts the changes you make to a member and clears the screen, you can inquire on that member by choosing Redisplay Previously Changed Member (F9).

## Checklists

To display checklists, choose Checklists (F10). Use this table to create rate or message codes for certain JD Edwards World systems, including benefits, work orders, and product costing. Each system uses the Generic Rates/Messages table differently. Consult the system documentation for information about Generic Rates/Messages.

## Member Category Codes

To use member category codes when developing custom code and using the SVR to track development, choose Member Category Codes (F13).

## Member Parameters/Key List

To display information about member parameters/key list, choose Member Parameters/Key List (F14). This was developed to document file access paths. It is currently used only in the World Writer conversion process during upgrade, where the F98013 file must contain file keys.

## Cross Reference

To cross reference information, choose Where Used (Cross Reference) (F15).

## Position Cursor to Action Code

When you inquire on a member, the system positions the cursor in the subfile for the screen. To reposition your cursor in the Action Code field, choose Position Cursor to Action Code (F17).

## Maintain Replacement Program Information

To display information about programs that replace obsolete programs, choose Maintain Replacement Program Information (F18).

### Previous Member

To access the member stored before the current member, choose Previous Member (F19).

### Next Member

To access the member stored after the currently displayed member, choose Next Member (F20).

## Flowchart Programs

To graphically display the program flow of systems, choose Flowchart Programs/Illustrate File Models (F23).

## Working with Repository Services

The SVR provides access to the other repository services within JD Edwards World. Additionally, you can use the Edit function (Option 2) to modify ILE copy members.

### To work with Repository Services

1. On SVR, choose Repository Services (F6).

The Repository Services screen displays.



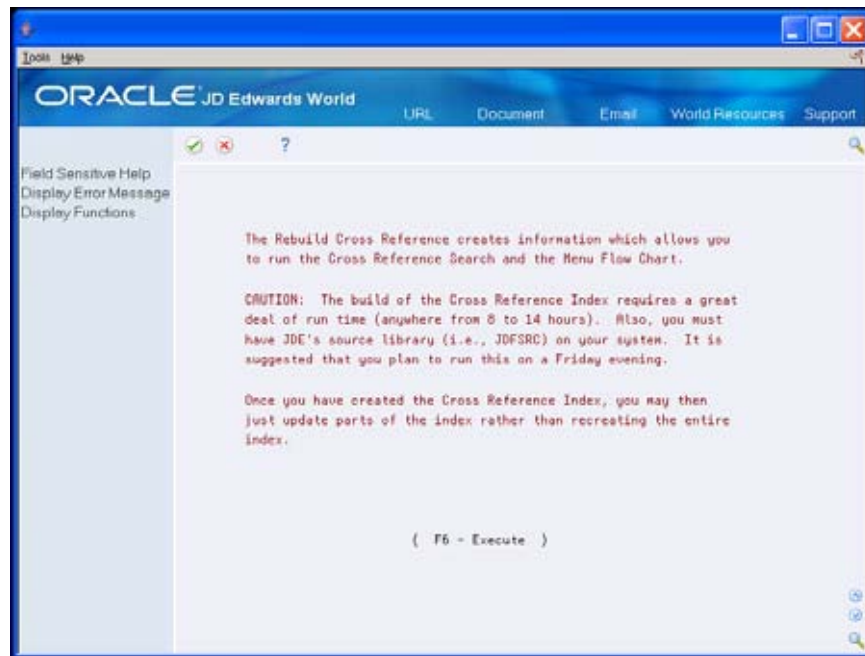
2. Enter 1 in the field to the left of your selection.
3. Exit (F3) Repository Services without making a selection.



through RPG IV. Additionally, in the SVR you can access the cross reference for RPG IV using F15.

The Rebuild Cross-Reference Index procedure updates information necessary to use the cross reference search and menu flow chart (F23) facility. It shows relationships between programs and files, commands, and User Defined Code tables.

- Rebuild the cross reference if you want the system to reflect your custom work in the cross reference and flow chart.
- Before submitting the Rebuild Cross-Reference Index, you must ensure that the Cross Reference files, F98001, F98002, and F98003 exist on your system.
  - Clear F98001/F98002/F98003 before a reinstall for quicker processing.
- If parameters are left blank in processing options, it reads the record from the SVR file for object and source library.
- If parameters are \*LIBL it will pick up the current library list.
- If parameters are specified with libraries, it will only read those libraries.
- Rebuild of the Cross-Reference Index can take many hours (estimate 8 to 14). It is not necessary to perform the procedure so that your JD Edwards World software runs normally, therefore, run the procedure during off-hours of operation.
- JD Edwards World source library (JDFSRC) must exist on your system to run this rebuild.



## What You Should Know About

Cross-Reference	Description
<b>Cross Reference screen is blank</b>	You must run the Rebuild Cross-Reference Index program. The Rebuild Cross-Reference Index program does not clear the files, it adds to the file. If you have old data in the cross reference, you must clear the cross reference files first then run the Rebuild Cross-Reference Index program.
<b>Disk space requirements for the Cross-Reference files</b>	<p>To locate the size of each file, enter the following command against the cross-reference files and their attached logical files: DSPOBJD and *SERVICE for Detail and *PRINT for output. Add the figures together.</p> <p>The files are approximately 500 MB or ½ Gig. The file size varies depending on the number of custom program entries in the SVR and the release of JD Edwards World software over which the system builds the cross-reference.</p>



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## **5 Environment Creation**





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# Overview to Environment Creation

## Objectives

- To understand what libraries appear on what library lists
- To understand how to create a production environment
- To understand the importance of the initial program (J98INITA)
- To understand how to set up pre-open files

## About Environment Creation

To use JD Edwards World software you must create the environment for you and your users. Creating an environment involves:

- Installing the JD Edwards World software
- Updating the IBM system to work with the JD Edwards World software
- Setting up the JD Edwards World system

For information about installing JD Edwards World software, see the *A91 Install Workbook* and the *Upgrade Reference* guides.

Complete the following tasks:

- Understand JD Edwards World Libraries
- Create a production environment
- Work with user profiles
- Review release level and install history



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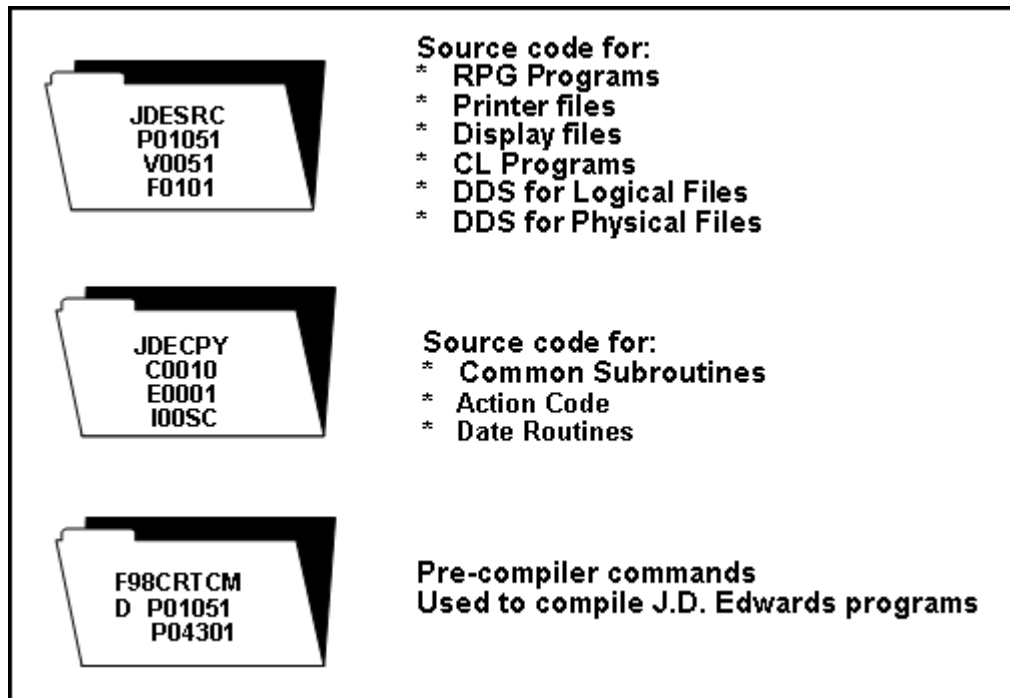
# Understand JD Edwards World Libraries

## What Libraries Does JD Edwards World Install?

After the software restore, the following three libraries exist. They are:

### The Source Library (JDFSRC)

The source library contains source code. Within the JDFSRC library, JD Edwards World has three multi-member source files.



JD Edwards World specifies the source library (JDFSRC) with a library type of SRC.

### The Object Library (JDFOBJ)

The object library that contains executable objects for your JD Edwards World software include:

- RPG programs (contain a prefix of P)
- CL programs (contain a prefix of J)
- Display files (contain a prefix of V)
- Reports (contain a prefix of R)

JD Edwards World specifies an object library with a library type of OBJ.

### The Data Library (JDFDATA)

This is a pristine data library that contains test data files for your JD Edwards World software.

## About Your Library Environments

After installation of the software is complete, you must create an environment for the software. An environment is a named collection of libraries that contain files, programs, screens, and reports, all under a specific software release level. An environment also includes all attributes that determine how that environment is set up, such as printer overrides and JD Edwards World users.

The library types are:

Library Types	Description
Production Library	A library (also referred to as a data library) you create to contain your live JD Edwards World data files. A special JD Edwards World program facilitates this process by creating all of the necessary data files that belong in your production library.
Common Library	A library you create to contain your live JD Edwards World data files that are common to more than one environment. These are data files such as your Data Dictionary or help files. They are also referred to as control files. By maintaining these types of files in one location, you facilitate standardization and conserve on disk space.
Security Library	A library you create to contain your live JD Edwards World user profile files: F0092, F00921, F0093, F0094, F00944, and F0095. Sharing the user profiles between environments can minimize user profile maintenance. If you are setting up multiple environments that have separate object libraries you must have separate sets of security libraries. For example: if you have two versions of JD Edwards World software such as A9.1 and A7.3 you will probably need more than one security library. See the Security Library Considerations section for more information.

How many environments, production, or common libraries you choose to maintain depends on your database and company philosophy.

## Security Library Considerations

You should consider the following when setting up libraries for your system:

- Single security libraries are advantageous when J98INITA is the Initial Program on the IBM user profile. IBM object security might be necessary in addition to the JD Edwards World security options to complete the user security requirements.

- Multiple security libraries require you to perform maintenance and security tasks for each environment. If each environment has a different security scenario, you should not use a single security library. If separate security libraries are necessary, you must have a matching object library with the QJDF data area naming the security library in the User Profile Library field.
- Environments that are not all at the same release level, for example, A7.3, A8.1, and A9.1, require that the sign-on programs, the menu program, and the control files must all exist in the most recent release level.
- Environments that are at the same release level, allow you to store other files in the security library for maintenance or control purposes. For example, the Software Versions Repository, Function Key Security, and Action Code Security files can be in the security library. Any files in the security library should apply to all environments and should not be in any other user data library. The pristine JDFDATA library should contain all of the JD Edwards World files.
- Security libraries should be set as an SEC type on an upgrade plan. Ensure that you do not have duplicate files in multiple libraries in your upgrade plan. You must maintain the Control File Sets in the Control File Dependencies appendix of the *JD Edwards PTF Install Workbook*.

## Examples of Library Lists for Environments

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**Caution:** Never use JDFDATA in a production library list. When you upgrade, the JD Edwards World software would delete JDFDATA from your production library.

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Never put custom code in the JDFOBJ or JDFSRC libraries, or your own data in the JDFDATA library. Upgrades of JD Edwards World software remove and replace objects and data from these libraries, which could cause you to lose customized software or data. Do not put objects in the JDFINS library, which is replaced when you upgrade to future releases. Your custom upgrade plans in the JDFINS library are preserved.

### Production Environment — No Custom Code

Library	Description
QTEMP	IBM Temporary Library
JDFOBJ	JD Edwards World Object Library
CLTCOM	Client's Common Library
CLTDTA	Client's Data Library
CLTSEC	Security Library
JDFSRC	JD Edwards World Source Library (Optional)
QGPL	IBM General Purpose Library

**Production Environment — With Custom Code**

<b>Library</b>	<b>Description</b>
QTEMP	IBM Temporary Library
CLTOBJ	Client's Custom Object Library
JDFOBJ	JD Edwards World Object Library
CLTCOM	Client's Common Library
CLTDTA	Client's Data Library
CLTSEC	Security Library
CLTSRC	Client's Custom Source Library
JDFSRC	JD Edwards World Source Library (Optional)
QGPL	IBM General Purpose Library

**Development Environment**

<b>Library</b>	<b>Description</b>
QTEMP	IBM Temporary Library
DEVOBJ	Client's Custom Objects in Development
TSTOBJ	Test Objects
CLTOBJ	Client's Custom Object Library
JDFOBJ	JD Edwards World Object Library
DEVCOM	Client's Common Library for development
DEVDTA	Client's Data Library for development
CLTSEC	Security Library
DEVSRC	Client's Custom Source in Development
CLTSRC	Client's Custom Source Library
JDFSRC	JD Edwards World Source Library (Optional)
QGPL	IBM General Purpose Library

## Test Environment

Library	Description
QTEMP	IBM Temporary Library
TSTOBJ	Test Objects
CLTOBJ	Client's Custom Object Library
DEVCOM	Client's Common Library for development
JDFOBJ	JD Edwards World Object Library
DEVDTA	Client's Data Library for testing
CLTSEC	Security Library
QGPL	IBM General Purpose Library





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# Working with Software License Manager

The Software License Manager (SLM) provides a way to manage the license agreements based on the number of users rather than the size of your machine's central processing unit. It enables you to make decisions about adjusting your license agreement based on your company's growth and changing software usage.

This section contains the following:

- [About SLM](#)
- [Monitoring the Licensed Users](#)
- [Implementing SLM](#)
- [Inquiries and Reports](#)

## About SLM

JD Edwards World issues licenses for machines that run JD Edwards World software. If you choose to pay license fees based on the number of concurrent users, the license agreement indicates the number of users who can access the software at any particular time on that machine. SLM records the number of users at any particular time.

Specifically, the SLM does the following:

- Tracks the number of users who concurrently access JD Edwards World software on one machine over a period of time, which helps you determine your licensing needs.
- Keeps a log of the number of concurrent users who access JD Edwards World software for each day in a given month. You can print a report of this information.

You do not need to activate the SLM in order to run JD Edwards World World software. You do not need software protection codes and the SLM does not function in an enforcement mode. Audit mode is available for recording usage activity to aid licensing requirements.

## Monitoring the Licensed Users

When the SLM runs in audit mode, it monitors the number of concurrent users. JD Edwards World licenses the software for an individual machine. The SLM includes in the total count all users who access various environments on that machine regardless of the environment they use. The SLM counts users who access JD Edwards World software on multiple machines, but only on the machine on which

they are running. SLM identifies and tracks concurrent users by profile name, device (location), and job.

The SLM counts users as follows:

- Counts a user who accesses a JD Edwards World program through a menu selection, fast path, or hidden selection
- Counts a user until the user signs off of JD Edwards World software or enters hidden selection 30 to return to the Library List Selection screen
- Counts a user once if the user signs on multiple times on a single device
- Counts a user twice if a user is signed on to two devices
- Counts two users who are signed on to the same device as two users

For Multi-session terminals, counts a user once if the user is signed on to each device at the same time.

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**Note:** Multi-session terminal devices are either dual or quad session. The multi-session terminals types that the SLM supports are: 3153, 3197, 3476, 3477, 3486, 3487, 3488, 3489, 5291, and 8292. For PCs, the manner the SLM counts users is dependent on the configuration you use. System Network Architecture (SNA) with Advanced Peer to Peer Connection (APPC) devices counts users similar to the method that the SLM counts dumb terminal workstations. Additionally, the SLM identifies PCs on Transmission Control Protocol/Internet Protocol (TCP/IP) configurations by the virtual device and IP address, providing more accurate license counts. Note that as of IBM release V5R1, Client Access supports only TCP/IP configurations.

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The SLM counts group jobs as one user, and it counts a user who starts alternate sessions as one user. It only counts a user who is signed on to JD Edwards World software and who is executing a menu selection that runs a JD Edwards World program.

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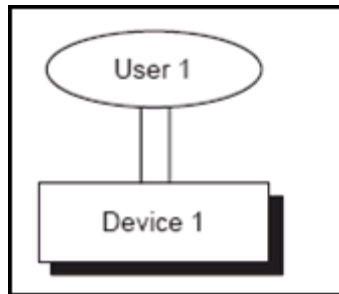
**Note:** The SLM does not count users who access an environment where SLM is not installed or not active (running a model-based SPC).

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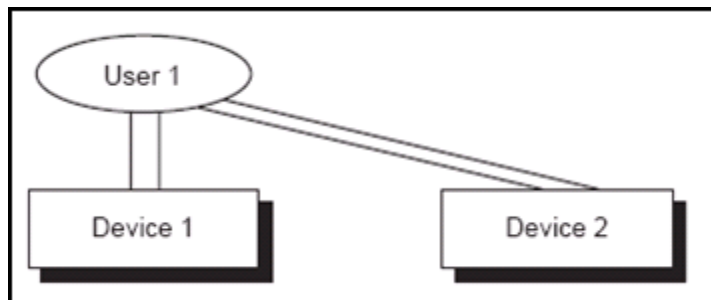
## Examples

The examples below assume dumb terminal workstation devices, or PCs that you configure under SNA support. Client Access Express dropped support for SDLC configurations and run native TCP/IP. PCs configured with TCP/IP are tracked by the IP address.

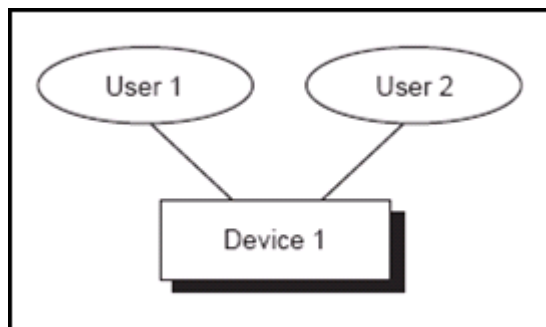
A user signs on to the same device twice with the same signon, and SLM counts one user.



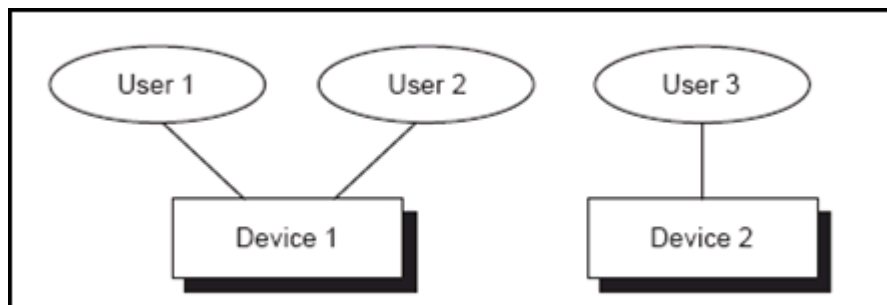
The same user signs on to another device, and SLM counts the user twice. The user signs on to the second device again, and SLM continues to count the user twice.



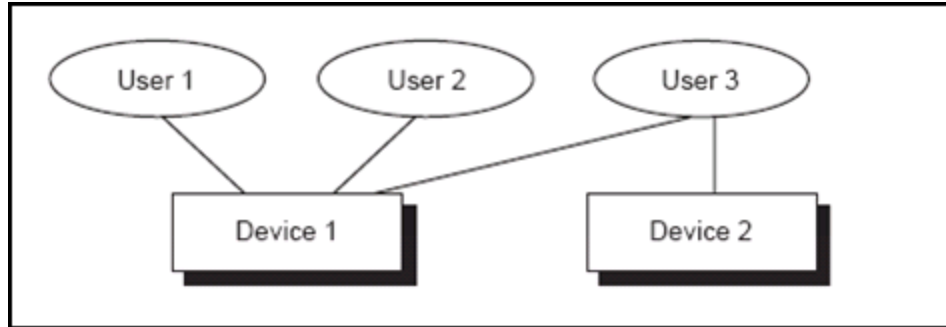
Two users sign on to the same device with different signons, and the SLM counts two separate users.



A third user signs on to a second device and the SLM counts three users.



The third user signs on to the first device also and the SLM counts four users.



## Implementing SLM

This section contains the following:

- Setting up SLM to run in audit mode
- Initializing or reinitializing SLM
- Setting up SLM to automatically reinitialize
- Setting up job control authority

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**Caution:** If a prior release of JD Edwards World software, for example A7.3, resides on your system and SLM is in use with licensed users, do *not* set up SLM to run in audit mode. If you do so, you will be unable to execute menu options in the prior release.

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## Setting up the SLM to Run in Audit Mode

In order to run the SLM in audit mode you must set up your system values.

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>JD Edwards World System Values</b>
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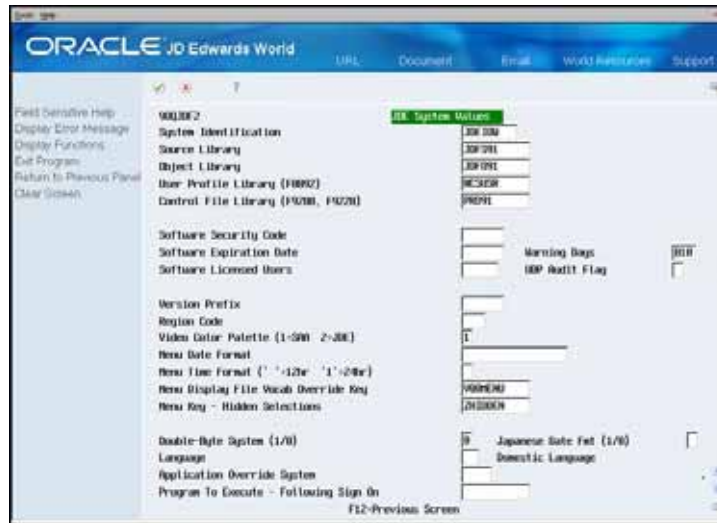
### Before You Begin

You must be signed on to the production environment of your system.

### To set up SLM to run in audit mode

1. Press F6 to bypass the menu message.
2. On the JD Edwards World System Values, verify that your object library is in the following field and press Enter:
  - QJDF Library Name

If your object library is not in this field, enter the object library name in the field and press Enter.



3. On the JD Edwards World System Values, enter 1 in the following field:
  - UBP Audit Flag

## Initializing or Reinitializing SLM

You must initialize the SLM in order for the software to monitor your license usage count.

You can initialize or reinitialize SLM while batch jobs are running, but not while users are active on the system.

### Before You Begin

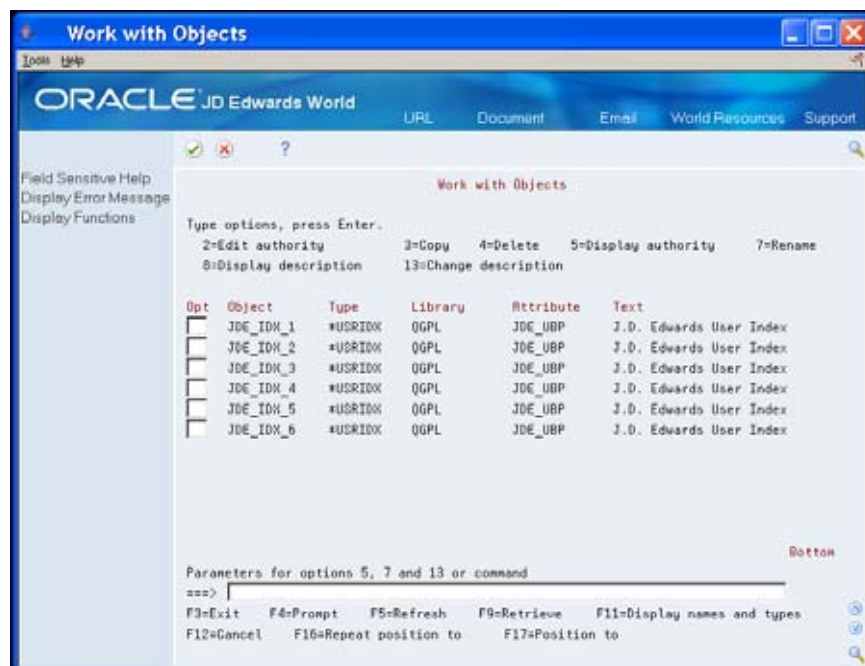
- Ensure that all users are signed off of the JD Edwards World software.
- Ensure the QSECOFR user profile does not access JD Edwards World software directly.
- Sign on as QSECOFR.
- Ensure that QTEMP, your JD Edwards World, and QGPL libraries are in your library list. Additionally, ensure that QTEMP is at the beginning of the library list, followed by your JD Edwards World object, common, production, and security libraries (in any order), and then the QGPL library. See *Creating Libraries* for more information about adding libraries.

### To reinitialize SLM

1. On the Command Line, enter WRKOBJLCK  
OBJ(QGPL/JD Edwards World\_IDX\_1) OBJTYPE(\*USRIDX).

If locks exist, instruct users locking the indexes to sign off. Alternatively, you may terminate their jobs.

2. On the Command Line, enter WRKOBJ QGPL/JD Edwards World\_IDX\_\*

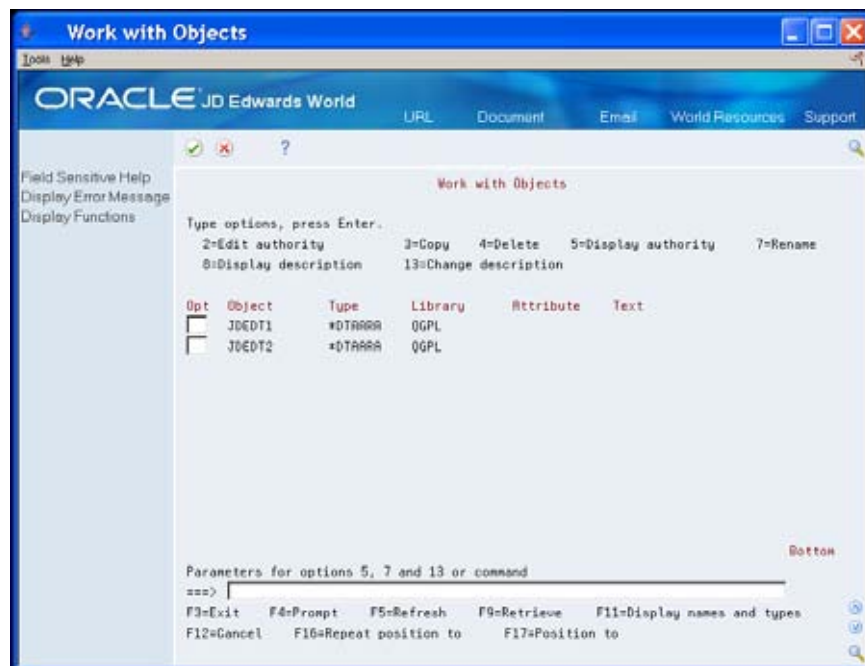


3. On Work with Objects, enter 4 in the following field to delete indexes JD Edwards World\_IDX\_1 through JD Edwards World\_IDX\_4:

- Option

Do *not* delete indexes 5 and 6 as they contain history information.

4. On the Command Line, enter WRKOBJ QGPL/JDEDT\*.



5. On Work with Objects, enter 4 in the following field to delete the data areas JDEDT1 and JDEDT2:

- Option

Continue to reinitialize SLM by completing the steps to initialize the SLM.

## To initialize SLM

1. On the Command Line, enter SBMJOB CMD(CALL J98802JQ).

The User Based Pricing program (J98802JQ) creates and initializes the SLM objects.

2. On the Command Line, enter WRKSBMJOB \*JOB

The User Based Pricing program (J98802JQ) should run without critical errors, and you should not receive a joblog. If an issue arises, refer to the joblog to troubleshoot the issue.

3. Sign off the system.
4. Sign on to the production environment in the system.
5. Access several different programs on different menus.

The ability to access different programs signifies that the SLM initialization was successful. The SLM runs in audit mode.

## Set Up SLM to Automatically Reinitialize

To ensure continual, accurate counting of users who access JD Edwards World software, you must set up the User Based Pricing program (J98802JQ) to run as an autostart job during an Initial Program Load (IPL). This ensures that the SLM will reinitialize properly. After completing this task, JD Edwards World recommends that you also run this program as a batch job at night or when users are not signed on to JD Edwards World software.

You can either set up the program to run as a sleeper job or in the IBM job scheduler. See *Set Up Sleeper* to set up the job as a sleeper.

### Before You Begin

- Ensure the QSECOFR user profile does not access JD Edwards World software directly.
- Select a subsystem that automatically starts during an IPL, such as QBATCH. You do not need to end this subsystem to make the following changes.

## To set up SLM to automatically reinitialize

1. Sign on as QSECOFR.
2. On the Command Line, enter CRTJOB JOB(CALL J98802JQ/JD Edwards World\_SLM) JOBQ(subsystem) OUTQ(outq) USER(jdeuser) RQSDTA('CALL objlib/J98802JQ') INLLIBL(QTEMP seclib comlib prodlb objlib QGPL)

Change the command as follows:

Subsystem is the name of the subsystem that automatically starts during an IPL

Outq is the name of your output queue

Jdeuser is the name of your user profile with security officer authority

Seclib is the name of your security library, if you have one

Comlib is the name of your common library

Prodlb is the name of your production data library

Objlib is the name of your JD Edwards World object library

This creates a job description for J98802JQ.

3. On the Command Line, enter ADDAJE SBSDB(subsystem)  
JOB(JD Edwards World\_SLM) JOBD(JD Edwards World\_SLM)

Change the subsystem in the command to the name of the subsystem that automatically starts during an IPL.

## Set Up Job Control Authority

The SLM contains a server program, User Based Pricing (X98UBP), which verifies jobs and adjusts user counts automatically. This program requires job control authority.

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**Note:** SLM verifies all active jobs, re-adjusts license counts in intervals of no less than five minutes, and this also occurs when a user requests a license. Job control authority verifies other user's jobs. If users, or the User Based Pricing program, do not have job control authority, then the SLM does not verify active jobs and does not release licenses of abnormally terminated jobs. This adversely affects the accuracy of the SLM license count, thus making SLM re-initialization an important, necessary, and more frequent task.

---

To set up job control authority, you can either set up users with job control authority or change the ownership of X98UBP and use adopted authority. This enables the server program to verify jobs and release or activate user licenses.

## Set Up Users with Job Control Authority

To set up each user with job control authority, you must set the special authority parameter in their IBM user profile to \*JOBCTL.

## Change Ownership of X98UBP

If your security implementation requires that individual users cannot have job control authority, you can change the ownership of the server program to an IBM profile that has job control authority. The user profile for the server program (X98UBP) is set to \*OWNER, which allows you to assign an owner which has job control authority.



## To change ownership of X98UBP

1. On the Command Line, enter `CHGOBJOWN jdfobj/X98UBP *PGM owner`  
Change `jdfobj` to the name of your JD Edwards World object library, and owner to the name of an IBM profile that has job control authority (\*JOBCTL).
2. On the Command Line, enter `CHGPGM jdfobj/X98UBP USEADPAUT(*YES)`  
This command ensures that X98UBP is set to use adopted authority. JD Edwards World programs are normally compiled to use the adopted authority of the owner.

---

**Note:** You must change all X98UBP programs in all your environments.

---

## Mirroring From One AS/400 Machine to Another

When mirroring from one AS/400 to another, you must exclude the following JD Edwards World objects from the mirroring process:

- Data Areas:
  - JDEDT1
  - JDEDT2
  - QJDF
- User Indexes:
  - JD Edwards World\_IDX\_1
  - JD Edwards World\_IDX\_2
  - JD Edwards World\_IDX\_3
  - JD Edwards World\_IDX\_4
  - JD Edwards World\_IDX\_5
  - JD Edwards World\_IDX\_6
- Programs:
  - X98UBP
  - X0001M

If you mirror from one AS/400 to another and are unable to sign on to the JD Edwards World software environment on the second AS/400 it might be due to a Software Protection Environment error. The indexes and data areas from the first machine might be locked by the mirroring program and the system cannot reinitialize the J98802JQ in an autostart job after the machine performs an IPL. This usually occurs after in IPL, or similar event, of the second machine.

## To resolve the Software Protection Environment error

1. Turn off mirroring.
2. On the Command Line, enter `WRKOBJ QGPL/JD Edwards World_IDX_*`

3. On Work with Objects, enter 4 in the following field to delete JD Edwards World\_IDX\_1 through JD Edwards World\_IDX\_6:
  - Option

These indexes reside in the QGPL library.
4. On the Command Line, enter WRKOBJ QGPL/JDEDT\*.
5. On Work with Objects, enter 4 in the following field to delete the data areas JDEDT1 and JDEDT2:
  - Option

These data areas reside in the QGPL library.

---

**Note:** The indexes and data areas should not exist in any library other than QGPL.

---

6. Reinitialize SLM. See *To reinitialize SLM* for more information.

## Inquiries and Reports

You can locate information and produce reports from the SLM.

This section contains the following:

- Verifying usage
- Locating audit and error messages

### Verifying Usage

The SLM automatically monitors the use of JD Edwards World software and checks for compliance with your license agreement when the UBP Audit Flag field is set to 1 on the JD Edwards World System Values screen and you initialize SLM.

You also can verify this information by:

- Locating interactive usage
- Creating the License Usage Report

### To locate interactive usage

You can display a list of users that the SLM counts when it checks for compliance. You also can refresh this information.



<p>From Master Directory (G), choose <b>Hidden Selection 27</b></p> <p>From Advanced &amp; Technical Operations (G9), choose <b>Security Officer</b></p> <p>From Security Officer (G94), choose <b>Software License Manager</b></p> <p>From Software License Manager (G943), choose <b>Job Information</b></p>
--


1. On Job Information, choose Verify All UPB Jobs (F5) to refresh all the information on this screen.

User ID	Device	JobNo	Session	Counted	Date	Time	Program
005479524	OPN00V00020	261225	1	1	12-08-06	09:03:35	J02900
007181104	OPN00V00024	261215	1	1	12-08-06	08:57:40	J060160
005479839	OPN00V00017	261204	1	1	12-08-06	08:45:41	J02900
005696259	OPN00V00006	261120	1	1	12-08-06	09:02:07	J00054
J25077004	OPN00V00079	261121	1	1	12-08-06	08:34:09	J060121
J26832101	OPN00V00020	261247	1	1	12-08-06	09:34:51	J42011
J25557473	OPN00V00051	261226	1	1	12-08-06	09:06:13	J29001
	OPN00V00051	261228	1	0	*****	*****	J29001
	OPN00V00051	261244	1	0	*****	*****	J52210
	OPN00V00072	261249	1	0	*****	*****	J5202
K05000621	K05000621	261250	1	1	12-08-06	09:45:23	J00053
L05027006	OPN00V00018	261151	1	1	12-08-06	09:35:13	J045000F
006574961	OPN00V00034	261216	1	1	12-08-06	09:23:54	J07703

- 2. Enter 5 (Verify Job) in the O (Option field) next to the User ID to refresh the information for a specific user.

To create the license usage report

The License Usage Report (R98808) provides usage information for the time period you specify in the processing options with the DREAM Writer version. You also can set up your own versions. For example, set up versions for separate months.



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **Software License Manager**  
From Software License Manager (G943), choose **License Usage Report**

- 1. On License Usage Report, a DREAM Writer versions list displays.
- 2. Enter 1 in the Option field next to version ZJDE0001.
- 3. On Processing Options Revisions, enter the starting and ending dates (MM/DD/YY format) for which you want to run the report.

98312 Processing Options Revisions

Oracle JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Return to Versions List  
Exit to Printer Overrides  
Return to Version Identif

90312 Processing Options Revisions Form ID P90000  
Version X3DE0001  
Display Level.

Print User License Usage History

This job has various options described below. Enter the desired values and press ENTER to continue.

Message Starting Date ( Blank = First )

Message Ending Date ( Blank = Last )

F5=Printer Overrides

An example of the report follows:

98808 J.D. Edwards & Company Page - . . . 1  
Print User License Usage History Date - . . . 6/16/97

April - 96

Date	Users
04/04	134
04/05	165
04/07	4
04/08	188
04/09	137
04/10	119
04/11	138
04/12	128
04/13	13
04/14	8
04/15	182
04/16	63

User Software license. . . . . 120 Times License Exceeded . . . . 7

## Locating Audit and Error Messages

The SLM enables you to locate information about license non-compliances (number of users who exceed the license agreement) and error messages you receive from the SLM.

You can retrieve this information by:

- Locating job information interactively
- Locating audit error messages interactively
- Creating the Audit/Error Message Report

## To locate job information interactively

You use the Job Information program (P98805), to display detailed job information for a specific user.



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Security Officer**  
 From Security Officer (G94), choose **Software License Manager**  
 From Software License Manager (G943), choose **Job Information**

On Job Information, complete the following field:


- Skip to User

## To locate audit error messages interactively

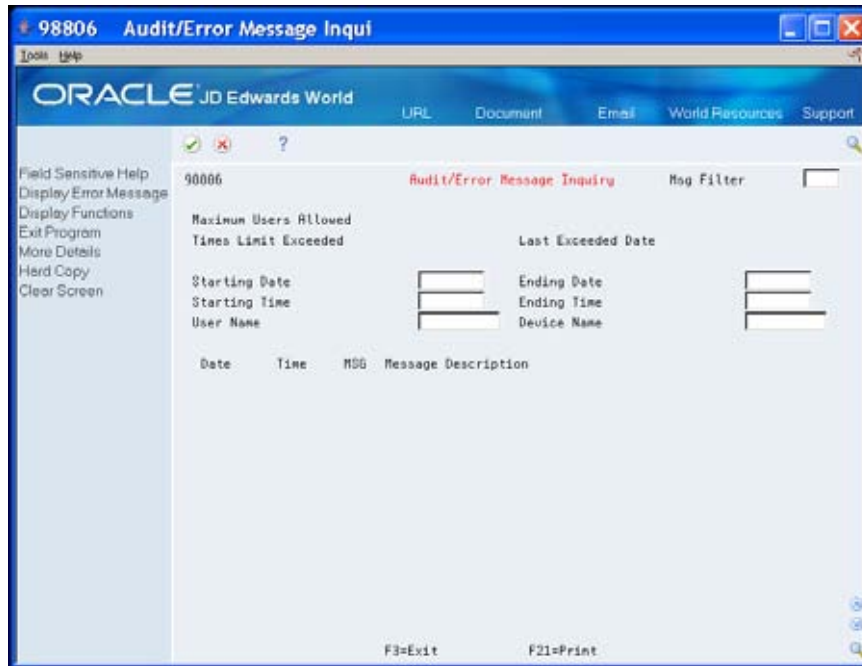
You use the Audit/Error Message Inquiry program (P98806), to display the following information:

- Maximum number of users for which you have a license.
- Number of times users exceed the license count.
- Last date users exceeded the license count.
- Dates and times of error messages.
- Error message IDs and descriptions.

In this program, you can also reduce the range of information the system displays. Additionally, you can print the information (F21) on the screen.

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>Software License Manager</b> From Software License Manager (G943), choose <b>Audit/Error Message Inquiry</b>
---	---


On Audit/Error Message Inquiry, complete any of the fields.



## To create the audit/error message report

The Audit/Error Message Report (R98807) provides you with audit and error message information that the license management server gathers. It provides slightly more detail than the Audit/Error Message Inquiry program (P98806).

You also can set up your own versions. For example, set up versions for separate months.

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>Software License Manager</b> From Software License Manager (G943), choose <b>Audit/Error Message Report</b>
---	--

1. On Audit/Error Message Report, a DREAM Writer versions list displays.
2. Enter 1 in the Option field next to version XJDE0001.
3. On Processing Options Revisions, enter the starting and ending dates (MM/DD/YY format) for which you want to run the report.

If you leave the processing options blank, the report prints all records.

An example of the report follows:

08807		J.D. Edwards & Company				Page - - - 1
		Print User License Messages				Data - - - 6/16/97
Date	Time	ID	Device	Msg ID	Code	Message Description
*****						
04/11/97		MOE11401	V3197DHF20	JDE0458	3203	Maximum user count reached was 00003.
04/12/97		LG1837857	V3197DHF14	JDE0458	3203	Maximum user count reached was 00002.
04/13/97		NO5559815	V3197DHF12	JDE0458	3203	Maximum user count reached was 00003.
04/14/97		JMS552851	Q9ACSV0014	JDE0458	3203	Maximum user count reached was 00053.
05/08/97	21:24:39	*JDE	4	USPJOB	JDE0451	1002 Object JDEUT1 type *CTANNA not found.
		*JDE	4	USPJOB	JDE0451	1003 Object JDEUT2 type *CTANNA not found.
		*JDE	4	USPJOB	JDE0451	1004 Object JDE_IDX_1 type *USRIDE not found.
		*JDE	4	USPJOB	JDE0451	1005 Object JDE_IDX_3 type *USRIDE not found.
		*JDE	4	USPJOB	JDE0451	1006 Object JDE_IDX_3 type *USRIDE not found.
		*JDE	4	USPJOB	JDE0451	1007 Object JDE_IDX_4 type *USRIDE not found.
		*JDE	4	USPJOB	JDE0452	2102 Object JDEUT1 type *CTANNA created.
		*JDE	4	USPJOB	JDE0452	2103 Object JDEUT1 type *CTANNA created.





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# Create a Production Environment

## Creating a Production Environment

This section contains the following:

- [Creating Libraries](#)
- [Updating the QJDF Data Area](#)

## Creating Libraries

	From Advanced & Technical Operations (G9), choose <b>Computer Operations</b> From Computer Operations (G96), choose <b>Data Base Management</b> From Data Base Management (G9645), choose <b>Data Libraries</b>
---	---

When you complete this task, the program automatically does the following:

- Creates your libraries.
- Creates the physical and logical files that should be maintained in your common library.
- Creates the physical and logical files necessary for operations control in your production library.
- Creates the physical and logical files for your various applications in your production library.
- Generates reports to identify all the physical, logical and join files created and to identify where they were created.
- Generates a report to identify all the optional files. The report explains why the files are optional so that you can determine if they should be deleted.

If you create a common library, be sure to specify it each time you create the other production libraries. If you do not, the system creates the files in your production library.

You can also use the IBM command CPYLIB to copy production libraries to alternate environments. CPYLIB requires access paths to be rebuilt and skips files that are in use.

### To create libraries

1. On Data Libraries, enter the appropriate information.

When you press Enter, the system submits the job (P98102) to batch.

2. Repeat the above steps for each production data library that you have.

---

**Note:** If you do not enter a common library name, the system creates all of the common files in the production data library.

---

Field	Explanation
Selection value	<p>The data selection value. A special facility has been provided to allow selection of multiple specific values. By entering '*VALUES' in the selection field, a special display screen will be displayed allowing the entry of up to 45 specific values. If you specify '*VALUES' in multiple selections of the original display, you will be prompted for multiple values lists.</p> <p>Enter the value '*BLANKS' if you are searching on a blank value. You cannot leave the values field blank to search on blanks, it will default to '*ALL'. Enter the value '*ZEROS' when searching for amounts equal to zero.</p> <p>The '*RANGE' keyword will display a special display screen which will allow the entry of a range of values (i.e., from 1 to 50). The first value MUST be LESS than the second value. If it is equal or greater than, it will not work.</p> <p>If you want to select all values for a field, enter '*ALL'.</p>

## Updating the QJDF Data Area



From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **JD Edwards World System Values**

QJDF is a data area within the JDFOBJ library. It controls system features of the JD Edwards World software. A menu option named JD Edwards World System Values lets your JD Edwards World Security Officer update this area with values pertinent to your organization.

To facilitate error recovery, JD Edwards World recommends that you print a copy of these values before you make any changes to this data area.

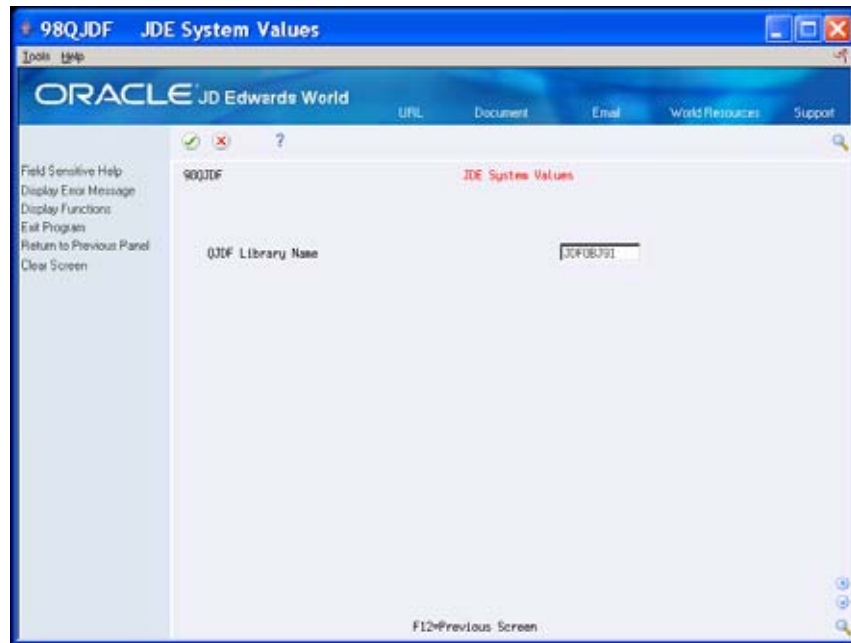
### To update the QJDF Data Area

1. After reading the Caution Message, press F6.

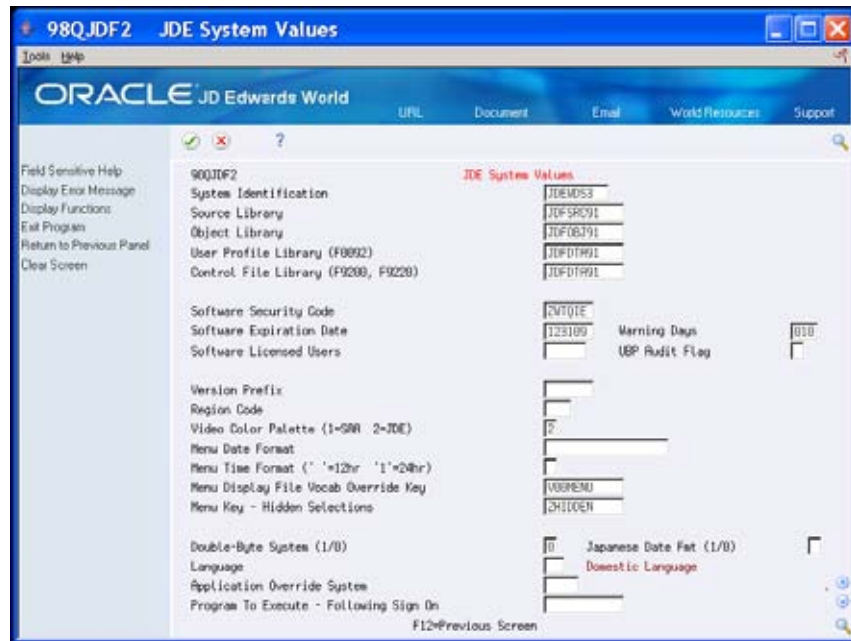


The JD Edwards World System Values screen displays and indicates the library where QJDF Data Area resides.

The QJDF Data Area resides in the object library (JDFOBJ).



2. Press Enter. The JD Edwards World System Values changes to display details of the QJDF Data Area.



Field	Explanation
System Identification	Used by the Master Menu program to display the system ID in the upper right corner of each menu. The contents of this field should match the IBM System Identification Value.

Field	Explanation
Source Library	Used by JD Edwards World and Company utility programs as the last default library location for software source code. If you do not designate a source library name when using some JD Edwards World utilities, the system searches for the source in the library found in this field. The default is JDFSRC and should not be changed.
Object Library	Designates the library containing the execution objects required by the initial sign-on program. This field is also used by JD Edwards World's PTF procedures to know where to replace the object code. The default is JDFOBJ and should not be changed.
User Profile Library	Specifies the name of the library that contains the user profile master file (F0092). When a user signs on, the initial sign-on program uses this field to find the F0092.
Control File Library	Contains all control files required at the time of sign-on. These files include the Vocabulary Override and Data Dictionary files.
Software Security Code	A special protection code used to determine client authorization to all JD Edwards World software and the duration of that authorization. It is a unique, encrypted code. When signing on to the JD Edwards World software, this code is checked for validity and if it is not valid, or expired, the user is notified by the authorization error screen.
Software Expiration Date	Displays the software expiration date. <b>Note:</b> Any attempt to change the expiration date in this field results in disabling the software.
Warning Days	Specifies the number of days in advance a visual warning of the expiration of the software is displayed.
Software Licensed Users	The number of users allowed to concurrently access JD Edwards World software when running a "User Based License". This number is used in conjunction with the software expiration date and your system serial number to validate the Software Security Code for your system. If you need authorization for more users, contact JD Edwards World to increase your software license and get a new Security Code. If you are running a "Model Based" license, this field MUST be blank.
UBP Audit Flag	Designates the running mode of JD Edwards Software License Management. You may run the software in audit mode only when you have a "Model Based" Software Security Code. Once you have been issued and have entered a "User Based" Security Code, this flag must be blank or 0. Trying to run License Management in audit mode with a "User Based" Security Code will render the software inaccessible.

Field	Explanation
Version Prefix	Identifies a default prefix to assign when creating DREAM Writer versions. Versions can then be suffixed with a number between 0001 and 9999.
Region Code	The Menu Country/Region Codes field contains the region code (3 bytes) for all 24 menu selections for each menu record. This region code is used to mask those international selections that are country specific; i.e. 1099 processing in the US and VAT tax processing in Europe.
Video Color Palette	<p>The Video Color Palette field is used by all JD Edwards World and Company programs to determine which color palette to display on color terminals.</p> <p>1     SAA Color Palette</p> <p>Video Id — Blue</p> <p>Video Title — White</p> <p>Error Emphasis — White</p> <p>Input/Output fields — Green</p> <p>Window Borders —Blue</p> <p>2     JD Edwards World Color Palette</p> <p>Video Id — Green</p> <p>Video Title — Yellow</p> <p>Error Emphasis — Red</p> <p>Input/Output Fields — Turquoise</p> <p>Window Borders — Turquoise</p>
Menu Date Format	<p>The Menu Date Format field lets the user specify the exact format to display on the menu. If left blank the format defaults to the standard format of day of week, month of year, day of month, year. The components of this free-form date format are as follows</p> <p>DD    2 digit day of week (01-31)</p> <p>MM    2 digit month of year (01-12)</p> <p>YY    2 digit year</p> <p>YYYY 4 digit year</p> <p>AM    alpha month of year (Jan, Feb etc.)</p> <p>AD    alpha day of week (Mon, Tue etc)</p> <p>You can separate each of these components with a blank, a comma, a slash, a period, or a dash (minus sign).</p>
Menu Time Format	<p>The Menu Time Format field lets the user specify the format the menu program displays the time of day. Valid codes are:</p> <p>blank 12 hour clock. This is the default.</p> <p>1     24 hour clock.</p>

Field	Explanation
Menu Display File Vocab Override Key	Specifies the record key of the soft-coding record in file F9220 for the menu driver. Do not change the default value V00MENU.
Menu Key - Hidden Selections	Specifies the menu record that contains the security masking for all hidden selections. The hidden menu selections are checked against this special menu record which contains the security masks for each hidden selection. Do not change the default entry, ZHIDDEN.
Double Byte System	<p>The Double-Byte System flag is the system value which is based on the operating system you have. It determines how textual information will be displayed and stored.</p> <p>1      Double-Byte</p> <p>0      Single-Byte</p>
Japanese Date Fmt (1/0)	<p>Used to designate that dates will be in Japanese format.</p> <p>Values are:</p> <p>1      Use Japanese format</p> <p>0 or blank      Use standard format</p>
Language	<p>A user defined code (system 01/type LP) that specifies a language to use in screens and printed reports. If you leave the Language field blank, the system uses the language you specify in your user profile. If you do not specify a language in your user profile, the system uses the default language for the system.</p> <p>Before any translations can appear, a language code must exist at either the system level or in your user profile.</p>
Application Override System	A code used to designate the reporting system number for entering specific help text. See User Defined Codes, system code 98, record type SY for a list of valid values.
Program to Execute - Following Sign On	<p>The Program Execution field designates to the Master Menu program a job or message that is to be executed by all terminals signing on or already signed on to the JD Edwards World and Company software. If this field contains a program name, the Master Menu program forces the execution of this program at the time each user returns to a menu. As users sign on, the designated program executes immediately. This program executes once for each user.</p> <p>You may also specify a special menu message to execute. Designate a message key by the "*" prefix. The message key without the prefix is the record key of a record in the Data Dictionary Master file. This provides the capability to issue a message of up to 1200 characters to all users on the system.</p>

## Resolving Production Library Environment Issues

Some common errors occur after the set up of your Production Libraries. The following will help you to avoid these problems.

Common Errors	Description
Library List problems	Importance of the QJDF Data Area. Library does not exist on system. The user is not authorized to access the existing library.
Library List not set properly	<ul style="list-style-type: none"> <li>Review the interactive joblog to locate the cause or error.</li> <li>Check the QJDF data area. Offset 150 should contain the common or security library where the system stores the F0092.</li> <li>Verify a record exists in the F0092 for the user attempting to sign on. If no record exists in the F0092 for the user, you must add a record in the User Information program (P0092) on the Security Office menu (G94).</li> <li>Change the IBM profile and remove the Initial Program and Library. This change allows the user to sign on to an IBM menu. After you sign on, change the job to second level message logging. Add JDFOBJ to the library list and call JDFOBJ/J98INIT or J98INITA. You will receive the Library List Not Set Properly error message and you should be able to review the joblog for more information on the cause or error.</li> </ul>
File not created in Production — uses JDFDATA	Keep JDFDATA out of a user's production library list to avoid this problem.
Logical files over incorrect physical files	Use the Print DB Relations report to help identify these errors.

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**Note:** You can also update or have the system display the QJDF Data Area using the IBM commands CHGDTAARA or DSPDTAARA.

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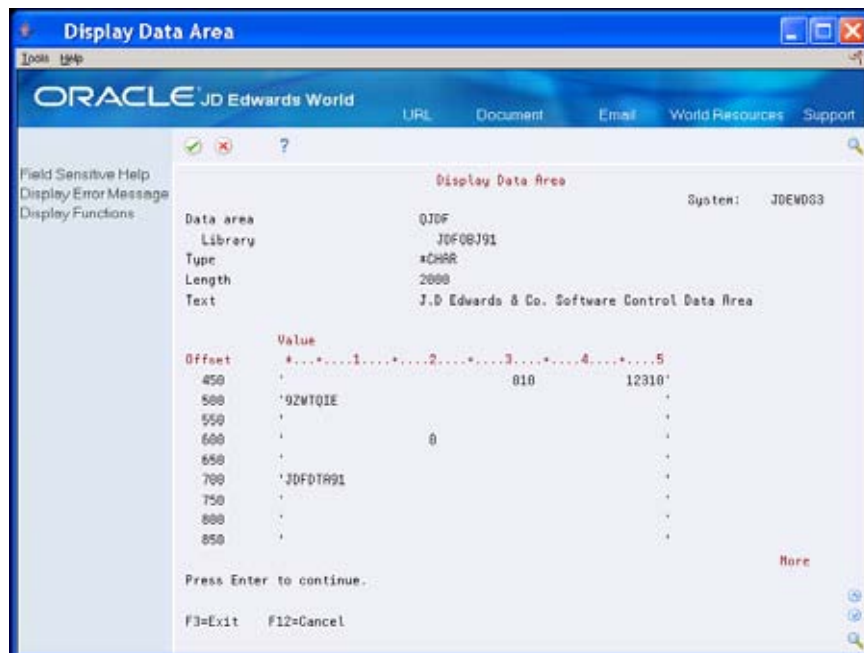
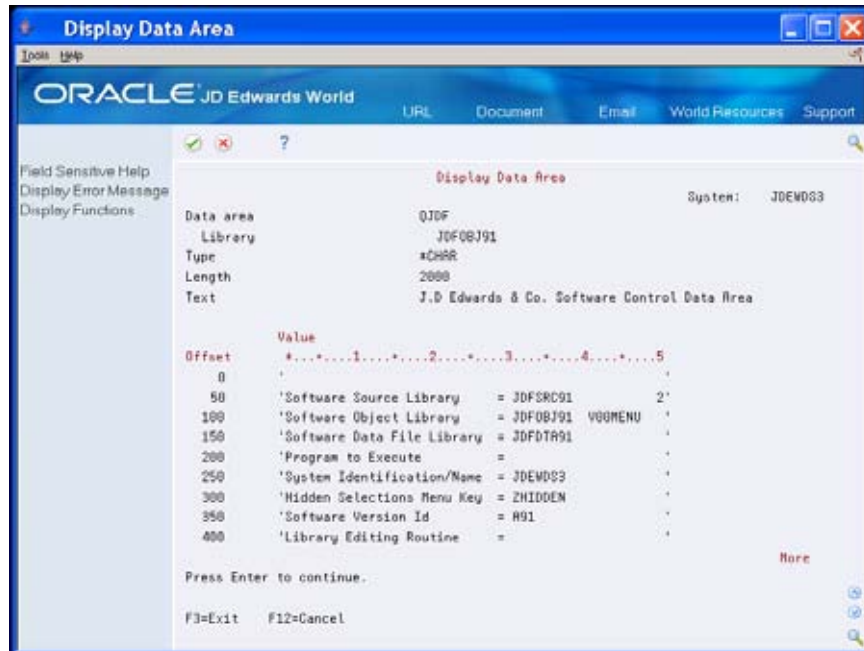
The following contains the characters in this data area:

Starting position	Substring length	Description
81	10	JD Edwards World Source Library
131	10	JD Edwards World Object Library
181	10	F0092 File Library
496	6	Expiration Date
502	6	SPC Code



Starting position	Substring length	Description
508	5	Maximum Number of Users
520	1	UBP Audit Flag
701	10	Control File Library – F9200, F9220

Following are examples of the QJDF Display Data Area:





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# Work with User Profiles

This section contains the following:

- [Defining User Profiles](#)
- [Setting Up Your Initial Program \(J98INITA\)](#)
- [Setting Up Pre-Open Files](#)

## Defining User Profiles

To properly define your user profiles for the JD Edwards World software, complete the following tasks:

- Review the IBM user profile
- Define JD Edwards World user profiles

### To review the IBM User Profile

1. On the command line, enter DSPUSRPRF USRPRF(xxx), where xxx is a user profile. The Display User Profile screen displays.



2. Ensure that the Group profile field is JD Edwards World.

You must use \*JOBCTL in the Special authority field if the user is compiling programs or manipulating the distribution or human resource subsystems. If the user has no need to use distribution or human resource subsystems, \*NONE is acceptable.

3. Page down to view the next portion of Display User Profile.



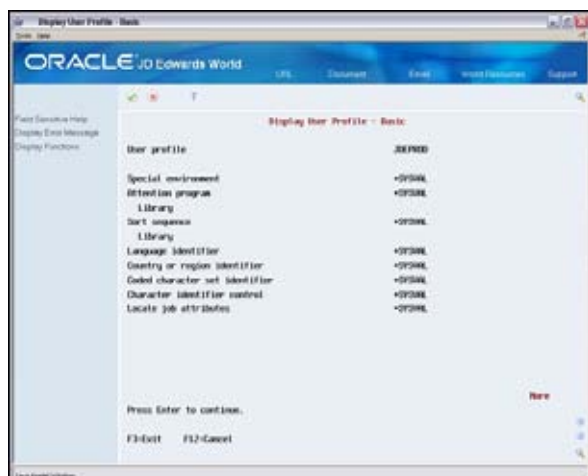
4. Ensure that the Initial Program field is J98INITA, using the JDFOBJ library.

When the Limit Capabilities field is set to \*YES on the IBM User Profile it overrides a Y setting in the Allow Command Entry field in the User Information program (P0092) on the Security Office menu (G94). This restricts the use of commands on the Command Line, Group Jobs, and in Software Versions Repository (SVR). It is recommended that you review all IBM user profiles that access JD Edwards World software. Set the Limit Capabilities field to \*NO or \*PARTIAL to allow the user to run commands from these options. If some users' profiles have the Limit Capabilities field set to \*YES, then you can set up the system to allow them to execute certain commands by entering CHGCMD on the Command Line. For example, to allow users to execute the CHGOBJ command, enter CHGCMD CHGOBJ on the Command Line and then set the Allow Limit Users (ALWLMTUSR) field to \*YES.

5. Page down to view the next portion of Display User Profile.



6. Page down to view the next portion of Display User Profile.



## Required IBM Object Authority for Users

All users must have the following authority to function properly within JD Edwards World. One way to accomplish this is to grant the authority to the Group Profile, usually JD Edwards World, and attach it to each IBM user profile.

Use the DSPOBJAUT command to view the object authority.

The following commands need \*USE authority:

IBM Commands A - C	IBM Commands D - O	IBM Commands R - W
ALCOBJ	DLCOBJ	RGZPFM
ADDJOBQE	DLTF	RMVBKP
ADDLIBLE	DLTPGM	RMVLIBLE
ADDMSGE	DSPBKP	RSTLIB
ADDRTGE	DSPDBG	RSTOBJ
CHGJOB	DSPDBR	RTVJOBA
CHGLIBL	DSPDEVD	RTVMSG
CHGOBJOWN	DSPFD	SAVLIB
CHGPGMVAR	DSPFFD	SAVOBJ
CRTDTAARA	DSPNETA	SAVSYS
CRTJOB	DSPPGMVAR	SBMJOB
CRTJOBQ	DSPSYSVAL	SNDBRKMSG
CRTCLPGM	DUPDKT	SNDMSG
CRTCLS	ENDDBG	SNDPGMMSG
CRTDSPF	INZDKT	STRDBG
CRTDTAQ	MONMSG	STRSBS
CRTL	MOVOBJ	STRSEU
CRTL	OVRDBF	WRKCFGSTS
CRTMSGF	OVRDKTF	
CRTMSGQ	OVRDSPF	
CRTPF	OVRPRTF	
CRTPRTF		
CRTRPGPGM		
CRTRPTPGM		
CRTSBS		
CRTSRCPF		

Other objects include:

Object	Type	Authority Required
QWCCLFEC	*PGM	*USE
QGPL	*LIB	*USE, *OBJMGT, and *ADD
QADSP	*FILE	*ALL
QAFDM	*FILE	*ALL

## To define User Profiles



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Security Officer**  
 From Security Officer (G94), choose **Library List Control**  
 From Library List Control (G944), choose **User Information Revisions**

Use the User Information screen to establish profile defaults for each user and their library list and establish JD Edwards World security at the user level.

1. After reading the message, press F6.

User Information Revisions displays.

Field	Explanation
User ID	The IBM-defined user profile.
Authorization Mask	<p>Complete with a user-defined value. This field exists in the JD Edwards World user profile and within each menu and menu selection. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. Comparison of the values in the user profile and the menu lock is hierarchical.</p> <p>A blank represents the highest level of authority. A through Z are the next levels, then 0 through 9. The user's value must be greater than or equal to that of the menu lock in the corresponding menu field to access the menu.</p>

Field	Explanation
Job Mask	Complete with a user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.
Knowledge Mask	<p>Complete with a user-defined value. This field exists in the JD Edwards World user profile and within each menu and menu selection. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. Comparison of the values in the user profile and the menu lock is hierarchical.</p> <p>A blank represents the highest level of authority. A through Z are the next levels, then 0 through 9. The user's value must be greater than or equal to that of the menu lock in the corresponding menu field to access the menu.</p>
Department Mask	Complete with a two-character, user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.
Future Use Mask	Complete with a user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.



Field	Explanation
Menu Identification	<p>The menu name. up to 9 characters. JD Edwards World Standards are: Menu numbers are preceded with a G prefix. The two characters following the prefix are the system code. The next characters further identify the menu. The 4th character specifies a specific skill level. The 5th character is used to distinguish between two menus of the same system with the same skill level.</p> <p>For example: G0911</p> <p>G      Prefix</p> <p>09     System Code</p> <p>1      Display Level/Skill Level</p> <p>1      First menu</p>
Initial Program	<p>The name of a program that will be called when the user signs on to JD Edwards World software. This program should never be J98INIT or J98INITA.</p>
Menu Travel Flag	<p>Used to control menu traveling within the JD Edwards World menu program for an individual user.</p> <p>This data field allows the values of blank, "Y" or "N".</p> <p>blank Indicates the user is allowed to menu travel.</p> <p>Y      Indicates the user is allowed to menu travel.</p> <p>N      Indicates the user is NOT allowed to menu travel.</p>
Command Entry Flag	<p>Used to control use of command entry in the JD Edwards World menu program for an individual user. You must also alter the IBM User Profile and Hidden Selections to eliminate a Command Line.</p> <p>This data field allows the values of blank, Y or N.</p> <p>Y      indicates the user has command entry.</p> <p>N      indicates the user does NOT have authority to command entry.</p>
Fast Path Security Flag	<p>The Fast Path flag is used to specify whether individual users may use the "Fast Path" method of processing within the JD Edwards World menu program.</p> <p>This data field allows the values of blank, Y or N.</p> <p>blank user is allowed to use fast paths</p> <p>Y      user is allowed to use fast paths</p> <p>N      user is NOT allowed to use fast paths.</p>

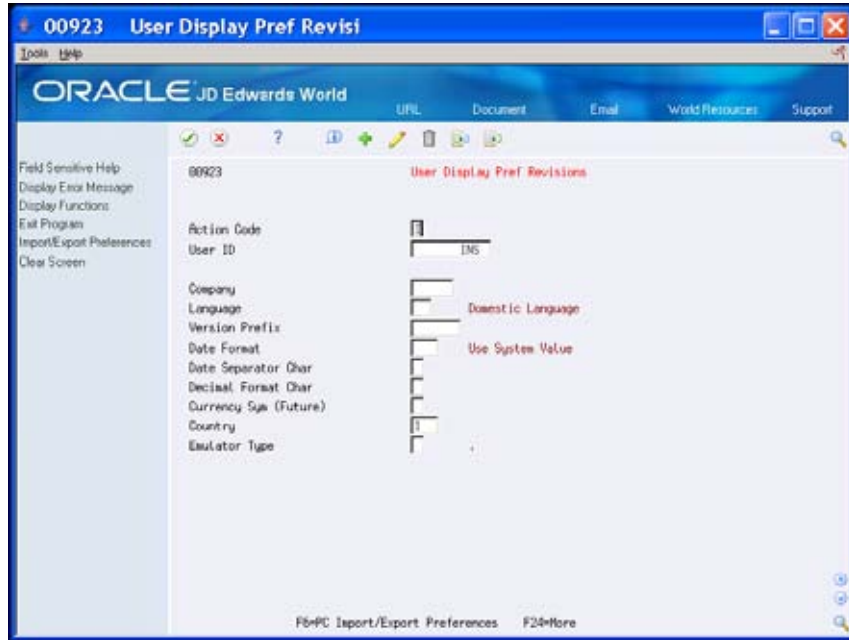
Field	Explanation
Level of Display	<p>The Level of Display field contains a number or letter identifying the level at which menus and processing options are displayed. The levels of display are as follows:</p> <ul style="list-style-type: none"><li>A Product Groups (e.g. Job Cost, Manufacturing)</li><li>B Major Products (e.g. GL, AP)</li><li>1 Basic Operations</li><li>2 Intermediate Operations</li><li>3 Advanced Operations</li><li>4 Computer Operations</li><li>5 Programmers</li><li>6 Sr. Programmers Use F16 on any menu and skip to menu A09 (Level 9) for an illustrative example.</li></ul>
User Type	<p>Defines the list of data files that are to be pre-opened at sign-on time. JD Edwards World provides 14 model user types.</p>
User Class/Group	<p>A profile used to classify users into groups for security purposes. Some rules for creating a User Class/Group are as follows:</p> <ul style="list-style-type: none"><li>▪ The 'Class/Group' profile must begin with * so that it does not conflict with any IBM profiles.</li><li>▪ The 'User Class/Group' field must be blank when entering a new group profile.</li></ul>
Batch Job Queue	<p>The computer waiting line that a particular job passes through. If blank, it defaults to the job queue specified in the user's job description.</p>
Job Scheduling Priority	<p>The scheduling priority parameters specify the priority values to be used by the system to determine the order in which the jobs are selected for processing. Each job is given a scheduling priority that is used for both job selection and spooled file output. The job scheduling priority is specified by the JOBPTY parameter in commands like CHGJOB and CRTJOB. The priority value may range from 1 - 9 with 1 being the highest priority and 9 being the lowest priority. You cannot schedule a job with authority greater than your own.</p>
Logging Level	<p>Specifies one of five logging levels (0 - 4) that specifies the message logging level used for job messages produced when this job description is used.</p> <p>(See CL Manual for detailed explanations of each logging level)</p>

Field	Explanation
Output Priority	The scheduling priority parameters specify the priority values to be used by the system to determine the order in which spool files will be selected for processing. Each job is given a scheduling priority that is used for both job selection and spooled file output. The job scheduling priority is specified by the JOBPTY parameter in commands like CHGJOB and CRTJOB. The priority value may range from 1 - 9 with 1 being the highest priority and 9 being the lowest priority. You cannot schedule a job with authority greater than your own.
Output Queue	The waiting area a job goes to after it has processed. Output Queues are sometimes attached to printers. If an OUTQ is not specified, it will default from the user's job description. You can use *WKSTN, *USRPRF, and *DEVICE
Current Library	Name of the library to be assigned to the user's job as the current library. A library which is searched immediately before the users' library. JD Edwards World does not use Current libraries.
Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, special mailing addresses, and so on.
Set Attention Program	Specifies the name of an executable program that can be set to execute a job or go to a menu when you press the attention key (Esc key on a PC keyboard). This name must follow the standard AS/400 naming conventions and all of JD Edwards World standards for program names (that is, the beginning character must be a J, P, or X). <p style="text-align: center;"><i>Screen-specific information</i></p> <ul style="list-style-type: none"> <li>▪ The program ID must be for an interactive program. You cannot use this for a batch job. You must also ensure that the program is able to run with no parameters, as that is how the system calls the program.</li> <li>▪ The menu ID you enter in this field must be preceded by an *, for example *G82.</li> <li>▪ The limitation on Group Job menus is 15 selections, therefore, the first 15 interactive menus selections appear.</li> <li>▪ A Command Line is at the bottom of the Group Jobs window (J98GRP) to use for commands, Fast Path commands, and Hidden Selections.</li> <li>▪ You must sign off and sign on to the JD Edwards World environment after changing the user profile.</li> </ul>

You can choose Library List (F9) to access the Library List Control Inquiry screen. Use this screen to view all of the libraries associated with a particular

User Profile. You can also access this screen from the Library List Control menu (G944), choose Library List Users.

2. Choose User Display Preferences (F6) to display language. The User Display Pref Revisions screen displays.



Field	Explanation
User ID	The IBM-defined user profile.
Company	<p>A code that identifies a specific organization, fund, entity, and so on. This code must already exist in the Company Constants table (F0010). It must identify a reporting entity that has a complete balance sheet. At this level, you can have intercompany transactions.</p> <p>NOTE: You can use company 00000 for default values, such as dates and automatic accounting instructions (AAIs). You cannot use it for transaction entries.</p>
Language	<p>A user defined code (system 01/type LP) that specifies a language to use in screens and printed reports. If you leave the Language field blank, the system uses the language you specify in your user profile. If you do not specify a language in your user profile, the system uses the default language for the system.</p> <p>Before any translations can appear, a language code must exist at either the system level or in your user profile.</p>
Version Prefix	Identifies a default prefix to assign when creating DREAM Writer versions. Versions can then be suffixed with a number between 0001 and 9999.
Date Format	This is the format of a date as stored in the database.

Field	Explanation
Date Separator Character	<p>The character entered in this field will be used to separate the month, day, and year of a given date.</p> <p>NOTE:</p> <ul style="list-style-type: none"> <li>If an asterisk is entered (*), a blank will be used for the date separator.</li> <li>If left blank, the system value will be used for the date separator.</li> </ul>
Decimal Format Character	<p>The character entered in this field will be used to signify the fractions from whole numbers - the positions to the left of the decimal.</p> <p>If left blank, the system value will be used as the default.</p>
Currency Symbol	<p>The character entered in this field will be used to signify the currency symbol that will be attached to certain numeric values.</p> <p>*** This field will be implemented later ***</p>

3. Press Enter to create your JD Edwards World user profile.

**Note:** The program creates the user's job description.

- If the user who is entering the profiles does not have authority for the CRTJOB, CHGJOB or DLTJOB commands, you are given a warning. However, the program adds the record to the User Information (F0092) file, but does not create a job description for this user.
- The program also creates the Inquiry Message Reply parameter for the user's job description to \*SYSRPLY, to instruct the system to use the reply list entries.
- When using the JD Edwards World training environment, you do not have the authority to create job descriptions, yet you do have the authority to add a record to the User Information (F0092) file.
- Additionally, you can access the User Information program (P0092) on the Security Office menu (G94). This screen contains the same information, and you should only use this program if your initial program is J98INIT. Do not use if your initial program is J98INITA.

## Setting Up Your Initial Program (J98INITA)



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Security Officer**  
 From Security Officer (G94), choose **Library List Control**  
 From Library List Control (G944), choose **Library List Revisions**

The J98INITA program is your access to the JD Edwards World software. Your users receive a multiple environment list where they have a choice of which library list they want to set for the JD Edwards World software.

When using J98INITA, it allows you to:

- Establish a library list once and then attach multiple users to it.
- Create multiple environments where one user profile has a choice of multiple environments.
- Transfer easily among your software environments.

For example, you can create a custom master menu to access JD Edwards World software, your company software, and other purchased software. You then exit JD Edwards World software and return to your custom master menu without redefining your environment.

The Library List Selection screen shows a sample selection of environments:

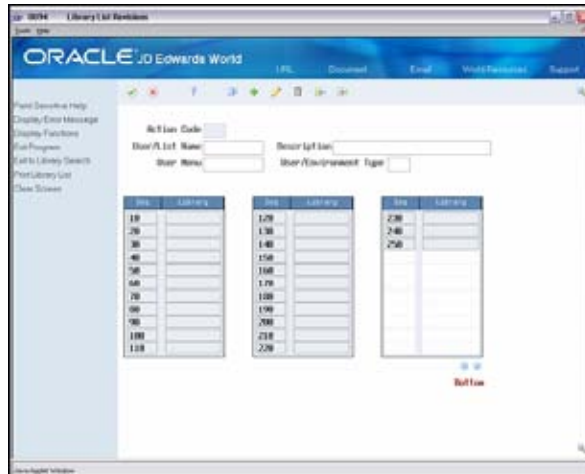


The Library List Selection screen displays immediately after sign-on or when the user takes hidden selection 30 from any JD Edwards World menu.

The IBM Operating System V5R1 contains a new data area, QLILMTLIBL, which resides in QUSRSYS library. The existence of this data area limits the number of libraries in the user part of the library list to 25 for all jobs on the system. Deleting or renaming this data area allows users to have up to 250 libraries in their user portion of the library list.

The IBM Operating System V5R2 contains an additional data area, QLMTUSRLIB, exists with a 0 (zero) in the first position set, allowing up to 250 libraries in the user portion of the library list. Changing this value to a 1 restricts the number of libraries to 25.

The Library List Revisions program (P0094) searches the system to determine if the QLILMTLIBL data area exists. If it exists, the program then displays a maximum of 25 entry fields for libraries as shown in the following example:



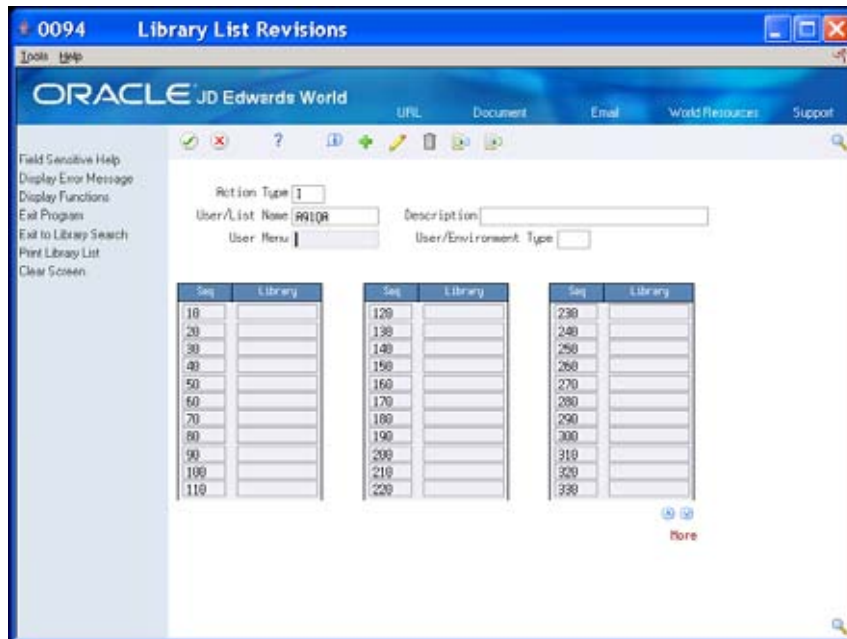
If this data area does not exist, a maximum of 250 entry fields for libraries displays (as shown in the steps below).

If you intend to change the mode to 250 users you need to delete or rename the data area QLILMTLIBL. If you are on V5R2 or above also verify that the first position in data area QLMTUSRLIB is set to '0' (zero).

### To set up the J98INITA program

1. On Library List Revisions, confirm that specific files are in the same library.

If you established a Security Library when creating your environments, this step should already be complete. If not, verify that F0092, F00921, F0093, F0094, F00944, F0095, and all associated logicals are in the same library.



2. Add each library list and establish the proper order of libraries for each library list. Ensure that QTEMP comes before QGPL in your library list.

3. After you make the appropriate entries, press Enter. Exit (F3) the program.

Field	Explanation
Library List Name	The name associated with a specific list of libraries. The J98INITA initial program uses the library list names to control environments that a user can sign on to. These configurations of library lists are maintained in the Library List Master table (F0094).
Description	A user defined name or remark that describes a field.
Program ID	The RPG program name defined in the Software Versions Repository Master table.  See also JD Edwards Standards.  T SS XXX T      Specific member ID number SS     System number, for example, 01 for Address Book XXX   Member type, for example, P for Program, R for Report, and so on
Library List	Enter up to 25 or up to 250 library names depending on your settings. The libraries are numbered sequentially by 10. You can resequence the display, add libraries, and delete libraries by changing the sequence numbers or clearing the fields.

4. To assign the appropriate library list to each user, choose User Signon List Revisions from the Library List Control menu (G944).

0093 User Signon List Revisio

Oracle JD Edwards World

Tools Help

URL Document Email World Resources Support

0093 User Signon List Revisions

Action Code [1]

User ID [ ]

Display Seq	Library List	Sign-on Menu	Description
1.00			
2.00			
3.00			
4.00			
5.00			
6.00			
7.00			
8.00			
9.00			
10.00			
11.00			
12.00			
13.00			
14.00			
15.00			

F3=Exit F0=Previous F15=Resequence



5. Enter the library lists you want to allow the user to access and press Enter. Exit (F3) the program.

Field	Explanation
Sequence Number	A number that the system uses to sequence information.
Library List Name	The name associated with a specific list of libraries. The J98INITA initial program uses the library list names to control environments that a user can sign on to. These configurations of library lists are maintained in the Library List Master table (F0094).
Menu Identification	<p>The menu name. up to 9 characters. JD Edwards World Standards are: Menu numbers are preceded with a G prefix. The two characters following the prefix are the system code. The next characters further identify the menu. The 4th character specifies a specific skill level. The 5th character is used to distinguish between two menus of the same system with the same skill level.</p> <p>For example: G0911</p> <p>G      Prefix</p> <p>09     System Code</p> <p>1      Display Level/Skill Level</p> <p>1      First menu</p>
Description	A user defined name or remark that describes a field.

## What You Should Know About

Initial Programs	Description
<b>J98INITA</b>	<p>Because J98INITA duplicates and changes the job description from QGPL to QTEMP, you must first authorize all users to the CRTDUPOBJ and the CHGJOB commands.</p> <p>For information regarding custom initial programs, see <i>Appendix A</i>.</p>
<b>J98INIT</b>	<p>The system directs users right into the JD Edwards World software.</p> <p>When using J98INIT, you must use option 2 from menu G94 to set up users. Each user needs an IBM profile using the following parameters:</p> <ul style="list-style-type: none"> <li>▪ Initial Program To Call — J98INIT</li> <li>▪ Library JDFOBJ</li> </ul>

## Working with Library Lists

Based on your user setup, the JD Edwards World sign on process determines which libraries the system assigns to you during your user session. This set of libraries is known as a library list. The library list specifies which files, programs, videos, and so forth the system accesses first.

It is possible for two objects with the same name to exist in different libraries in the library list. The system searches the libraries in the order set in the library list (top to bottom). You can control which objects the system uses by changing the order of the libraries in the list or by deleting or adding libraries to the list.

For example, the library list can contain two versions of a program, the standard JD Edwards World program and a custom version. These programs have the same name, such as P42565, but the custom version resides in a custom object library. The custom object library is higher in the library list than the JDFOBJ object library containing the standard program from JD Edwards World. When you select the program, the system searches the library list and retrieves the first occurrence, which is the custom program because it is higher in the list.

You can use the following commands to work with library lists:

**DSPLIBL** - Display Library List: Use this command to determine a user's library list and/or to investigate whether there is a custom library in the list. On the Command Line, enter DSPLIBL. Hidden Selection 38 also executes this command.

**ADDLIBL** - Add Library List Entry: Use this command to add a library to the user portion of the library list. On the Command Line, enter ADDLIBL *libname*, where *libname* is the name of the library you want to add. The system adds the library at the top of the list and it remains here until you remove it or until you sign off. Using F4, the List Position field allows you to set the library in the first or last position of your library list.

**RMVLIBLE** - Remove Library List Entry: Use this command to remove a library from the user portion of the library list. You can also use this command to temporarily remove a library, such as a custom object library, that is normally in the library list when a user logs on. On the Command Line, enter RMVLIBLE *libname*, where *libname* is the name of the library you want to remove. Your changes are only effective for the current session and the libraries are available the next time you sign on to the system.

**EDTLIBL** - Edit Library List: Use this command to edit the current user portion of the library list. You can move, add, or delete libraries from the list. On the Command Line, enter EDTLIBL. All the libraries and their sequence numbers display. To change the position of a library in the list, enter a new sequence number over the current number. To add a library, enter the library name and the sequence number. To remove a library, clear the library name. Your changes are only effective for the current session and do not exist the next time you sign on to the system.

## Objects to Exclude from the Mirroring Process

When mirroring from one IBM iSeries to another, you must exclude the following JD Edwards World objects. Failure to do so will result in issues after you sign on to the mirroring machine.

Area	Objects
Data Areas	JDEDT1 JDEDT2 QJDF
User Indexes	JD Edwards World_IDX_1 JD Edwards World_IDX_2 JD Edwards World_IDX_3 JD Edwards World_IDX_4 JD Edwards World_IDX_5 JD Edwards World_IDX_6
Programs	X98UBP X0001M
Libraries	SEALMS
Files	F99LSF

## Troubleshooting Invalid Library List or Library List Not Set Properly Error Messages

To troubleshooting invalid library list or library list not set correctly error messages

1. On the Command Line, enter DSPUSRPRF and a user profile, to display the IBM user profile.
2. Page down and verify the Initial Program field contains either J98INIT or J98INITA.

If the Initial Program field does not display either of these programs, determine which program the system is using.

3. Identify the name of the library in the Library field from which the system is calling the J98INIT or J98INITA program.

The library name is in the Library field below the Initial Program field. This is the library from which the system reads the QJDF data area.

4. On the Command Line, enter DSPDTAARA and the press F4.
5. On Display Data Area, enter QJDF in the following field:
  - Data area
6. Enter the name of the library in the Library field that you identified in the previous step and press Enter.

The Display Data Area screen redisplay with QJDF data area.

7. Identify the name of the library at the end of Offset line 150 Software Data File Library.
8. Verify this is the correct library for the User Information (F0092) file.  
This library is usually the Security library or the Common library if you do not have a Security library.

9. On the Command Line, enter DSPPFM and the press F4.
10. On Display Physical File Member, enter F0092 in the following field.
  - File

11. Enter the name of the library in the Library field that you identified in the previous step.

12. On Display Physical File Member, enter the user profile in the Find field to locate the user profile and press F4.

If the system does not find the user profile in the F0092 file, add the record to the file. You can use Hidden Selection 40 to verify the file layout.

13. Verify that there is an IBM Job Description for the user profile.

If no Job Description exists for the user profile, you must create one.

14. On the Command Line, enter CHGJOB and press F4.

On Change Job Description, the value in the Job description field is the user name of the profile you are confirming. The library is QGPL.

15. On Change Job Description, press Enter to display the job description.

16. Press F10 for Additional Parameters.

17. Page down and locate the value in the Initial library list field.

- For J98INITA, the value should be \*NONE or the library list in this field should not contain access JD Edwards World Software.
- For J98INIT, verify that the library list is correct.

18. Verify the following:

- For J98INIT, access the User Information program from the Security Office menu (G94), to confirm the library list for the user in the specific environment.
- For J98INITA access the User Signon List Revisions program on the Library List Control menu (G944) to confirm the sign on list for the user. Access the Library List Revisions program on the Library List Control menu (G944) to identify the library list for the sign on list.

If using J98INITA for multiple environments at different release levels, for example A7.3 and A9.1, the system must call J98INITA from the object library at the higher release level. In this case, the system calls J98INITA from the A9.1 object library.

## J98INITA Sign On Messages

When J98INITA is the initial program, you might receive either of the following messages when you attempt to sign on to a JD Edwards World environment:

Message	Description
Conversion did not occur message	The user's Coded Character Set Identifier might be set to 65535 (do not translate) or *SYSVAL. If this field is set to *SYSVAL and you receive this message, then the QCCSID system value is set to 65535. This message generally does not cause a problem.
F0005 cannot be found message	The J98INITVL program adds the libraries in the QJDF data area to the user's IBM profile. The J98INITVL program then opens the F0005, F9220, and F9200 files for shared processing. If the F0005 is not in one of the libraries which were added to the user's library list, the system generates this message.

## Setting Up Pre-Open Files

The pre-open of database files for users at time of sign-on is a performance consideration. How often do your users sign-on and -off? Will this process of pre-opens be utilized in such a nature to help or hinder performance?

You need to look at pre-opens like a house full of doors. You open the front door and that opens all the doors in the house, so as when you go room to room, you don't have to stop to open each of the doors. However, if you leave all the doors opened in the house and you don't go into those rooms, you are losing energy. The pre-open data base files and the computer are similar in nature to the doors in the house.

Different categories of users use different groups of files. To assist you in determining these common user categories, a sample list of User Types has been provided in the F0095 file in JD FDATA. This includes the following profiles:


Profile	Description
ABENTRY	Maintains People, Places, and Things (Address Book)
ABUSER	ABENTRY plus DREAM Writer reporting
APREVV	Accounts Payable Review, Name Search, Supplier Inquiry, DREAM Writer
APENTRY	Accounts Payable Entry, Name Search, Inquiry, Voucher Entry

Profile	Description
APSUPR	Accounts Payable Supervisor, APENTRY plus Speed Release, Checks, and DW
ARREVV	Accounts Receivable Review, Name Search, Customer Inquiry, DREAM Writer
ARENTRY	Accounts Receivable Entry, Name Search, Inquiry, Invoice Entry, Cash Rcpts
ARSUPR	Accounts Receivable Supervisor, ARENTRY plus Online Journal Review
GLREVV	General Ledger Review, Online T/Bs, G/Ls, Budget Compare, DREAM Writer
GLENTRY	General Ledger Entry, Journal Entry functions
GLSUPR	General Ledger Supervisor, GLENTRY plus Business Unit, Acct Master, and DW
INVENTORY	Inventory system profile
SALES	Order processing profile
PURCHASING	Purchasing system profile

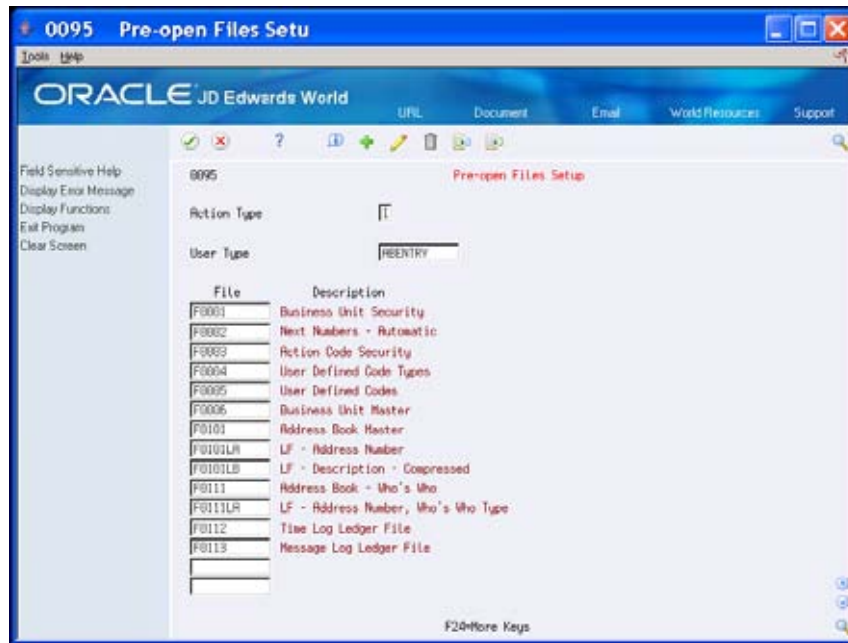
From Library List Control menu, you can also access:

- Valid Library Lists, which provides an inquiry, list of currently defined library lists, and their descriptions.
- Library List Users, which lets you view all users for a particular library.
- Library List Global Update, which provides a program to allow mass changes to library lists in both the User Profile (F0092) file and the Master Library List (F0094) file.

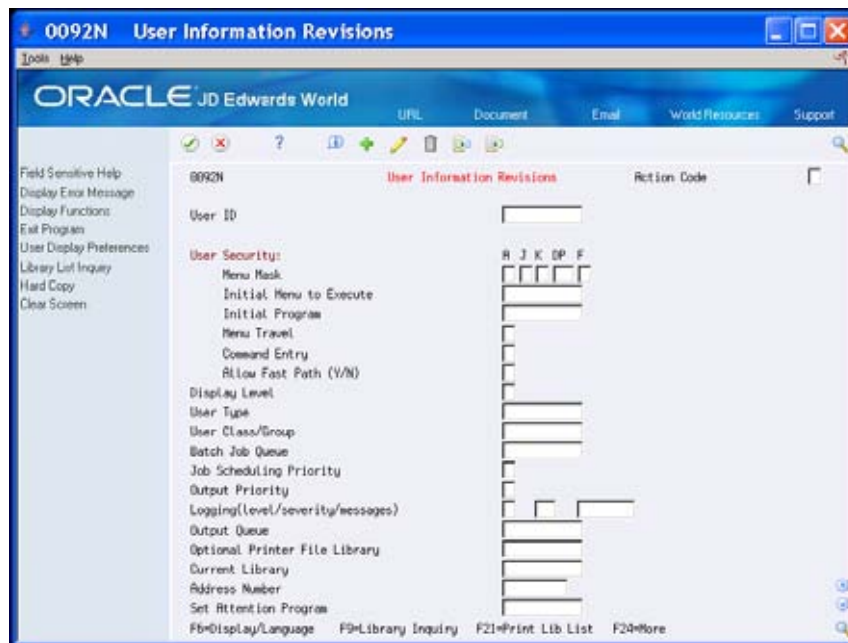
## To set up pre-open files

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>Library List Control</b> From Library List Control (G944), choose <b>Pre-open Files Setup</b>
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1. On Pre-open Files Setup, set up the lists of files you want the system to open.



2. Enter the name of the list on the User Information screen.
3. Exit (F3) the program.
4. From Library List Control (G944), choose User Information Revisions.



5. For each end user, enter the name of the list in the User Type field.
6. Exit (F3) the program.

JD Edwards World also gives you a set of pre-defined files for use in the pre-opens. If you press your HELP key, you see the ones identified for your use.

Use these lists as starting points for creating your own lists.

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**Note:** Use a user type of \*SYS to set up files opened for every user.

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# Set up Approval Management

Businesses are being forced to apply tighter controls to all of their data; either to ensure that their business processes are under control or that they can pass regulatory compliance audits.

The JD Edwards World Approvals Management system provides a powerful, highly configurable way to monitor activity within your system. Managers can define conditions such as a change in credit limit or security tax that trigger the creation of an approval request. The approval request contains a set of approvers responsible for monitoring the condition. In some cases, the approver may only need notification of the condition. In other cases, the system might require the approver to approve or reject the condition.

The Approvals Management system refers to conditions as rules. A rule is a condition that the system interprets as either true or false. For example, you create a rule that states when a customer's credit limit changes to a value greater than 10,000, the credit limit change must be approved. If a user changes the Credit Limit field to 25,000 then the system submits the change for approval.

Multiple conditions can be grouped together into one statement. For example, if a customer's credit limit increases above 10,000 then the approver in human resources must approve it. This statement contains two conditions, did the credit limit increase, and is it above 10,000? Both conditions must be true before the approver must approve it.

Rules are grouped together into rule sets by system. You customize rule sets to cover any field in any file within a specific system. The approval type distinguishes which system the rule set applies to. For example, approval type AB refers to the Address Book system.

The Approvals Management system creates an approval request whenever a rule is true. The creation of an approval request triggers email notifications to one or more people who will approve or reject the request. The approval request contains audit information that remains in the system after the request is approved or rejected, providing an audit trail tracking changes over time.

A rule contains an assignee. The assignee is the person who receives notification of the condition. An assignee can be setup as the person to notify or an approver. An assignee setup as the person to notify receives email notification but is not required to approve the approval request. An assignee setup as an approver receives email notification and is required to approve or reject the approval request.

You can assign one or more assignees to a rule set using approver groups or routes. An approver group is a group of assignees that you can assign to multiple rules. For example, an approver group name HR Managers contains all of the HR managers responsible for approving changes to employee records. You can assign approver group HR Managers to all rules dealing with employee records.

Approver routes are hierarchal groups of approvers. You assign each assignee to a level on the route. Assignees must approve the approval request in the order they appear on the route. You use routes to define a hierarchy of assignees based on job function. For example, a department consists of line level employees, supervisors, managers, and a vice president. You create the route with the supervisor on the first level, manager on the second level, and vice president on the third level. The manager is not able to approve or reject the request until the supervisor approves the request. The vice president is not able to approve or reject the request until the manager approves the request.

The Approvals Management system includes approver substitution functionality. One approver can be setup as a substitute for another approver. The approver substitution file contains effective dates you use to define the beginning and end dates of the substitution. You can also make substitutions permanent. Permanent substitution replaces one user for another in the assigned approver list and all other setup files in the approvals management system.

Actions that users perform on records in the system are referred to as transactions. For example, creating a new Address Book entry is part of an Address Book add transaction. Changing a category code on an existing Address Book record is part of an Address Book change transaction.

You assign rule sets to transaction types using the approval schedule. The approval process interprets the approval schedule and determines which rules to apply to the transaction. Whenever a user submits a transaction, the approval process retrieves the appropriate rule sets from the approver schedule using the transaction type. The system compares the transaction to the rule sets. If a rule is true, the system creates an approval request. If none of the rule sets equate to true, the system enters the transaction into the production environment.

## Address Book Approval Process Files

Approvals Management for Address Book includes the following files:

- F0101 - Address Book Master
- F0111 - Who's Who
- F0115 - Contact Phone Numbers
- F0116 - Address by Date
- F0301 - Customer Master
- F03015 - Customer Master - Company/Business Unit Defaults
- F0401 - Supplier Master
- F04015 - Supplier Master - Company/Business Unit Defaults
- F0030 - Bank Transit Number Master File
- F01014 - Address Book - Diversity Status
- F01017 - Address Book - Related Addresses
- F01018 - Address Book - Email / URL addresses

Any change to these files, including additions, deletions, or changes to existing records, triggers the creation of a transaction. The type of transaction the system creates has to do with the type of the change.

The system creates Address Book add transactions whenever a user creates a new address book number. The system adds other related records in the Address Book files, such as Who's Who, Addresses by Date, Contact Phone Numbers, and so forth to the open transaction until the user submits it.

The system creates Address Book change transactions whenever a user changes an existing Address Book number, including the addition or deletion of any of the records in related Address Book files. For example, adding additional who's who records or address records to an existing Address Book record is part of an Address Book change transaction.

The system creates Address Book delete transactions when a user deletes an existing address book record.

## Proof Mode

Approving each and every change in a system can be cumbersome. Setting Proof Mode in the Approval Constants allows the system to logically group changes to transactions. The system saves the changes within a transaction to workfiles. Other users cannot view or use the changes in a transaction until the originator of the change submits it to the system for processing.

Users can view transactions using the Transaction Workbench program (P00A11). The Transaction Workbench allows the originating user to view the transaction detail, submit the transaction, or cancel the transaction. In some cases, the user who created the transaction might decide the changes are not necessary and cancel the transaction. If the user submits the transaction, the system moves the changes within the transaction from the workfile to the production file. You can run the Approval Management system in proof mode with approval processing deactivated. However, you must activate Proof Mode if the Approval Management system is activated.

## Approvals Processing

After you activate approvals processing, the system compares data in transactions you submit to the appropriate rule sets before moving the transactions to production. The system creates an approval request when it evaluates a rule to be true. The system does not move changes in a transaction to production until the appropriate person (approver) approves the approval request. If the approver rejects the request, the system rejects the transaction and the data does not move to production. Approvers you assign to an approval request can view and approve or reject approval requests using the Approvals Workbench program (P00A12). The system automatically moves the transaction data from the workfiles to production once the last approver approves the approval request.

To define the JD Edwards World Approvals Management system, complete the following tasks:

- [Setting up Approval Management](#)

- [Configuring Approval Management](#)

## Before You Begin

- You *must* install JD Edwards World Service Enablement. See the *A9.1 Service Enablement Install and Configuration Guide* for more information.

## Setting up Approval Management

To set up JD Edwards World Approvals Management system, complete the following tasks:

- [To set up user information](#)
- [To set an e-mail address](#)
- [To set up constants](#)
- [To set up proxy user](#)
- [To create an output queue for approvals](#)
- [To create a job description](#)

### To set up user information



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **User Information**

To include users in the approvals process, they must have a unique employee address number (PPAT). Verify that each user has this unique employee address number, and if not, you must assign each user a unique employee address number. The employee address number must first exist in the Address Book system. Unexpected results can occur if you assign an employee address number to multiple users.

You use the User Information program (P0092) to assign the unique employee address number to the user ID.

1. On User Information, locate the user.
2. Complete the following field:
  - Employee Address Number (PPAT)

Field	Explanation
User ID	The IBM-defined user profile.
Employee Address Number	A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, special mailing addresses, and so on.

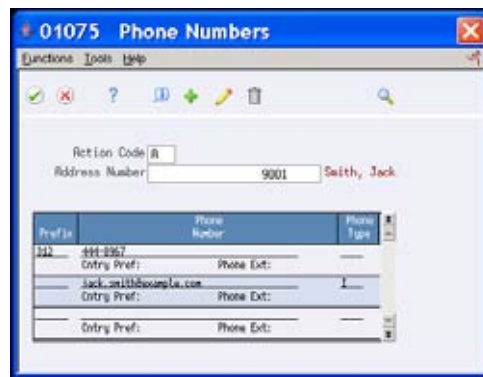
## To set an e-mail address



From Master Directory (G), choose **Address Book**  
 From Address Book (G01), choose **Address Book Revision**

All users in the approvals process must have an e-mail address in the Address Book system. Verify that each user has an e-mail address, and if not, you must set up an e-mail address.

1. On Address Book Revisions, locate the user.
2. Access Phone Numbers (F12).
3. Enter the e-mail address in the following field:
  - Phone Number
4. Enter I (internet address) in the following field:
  - Phone Type



## To set up constants

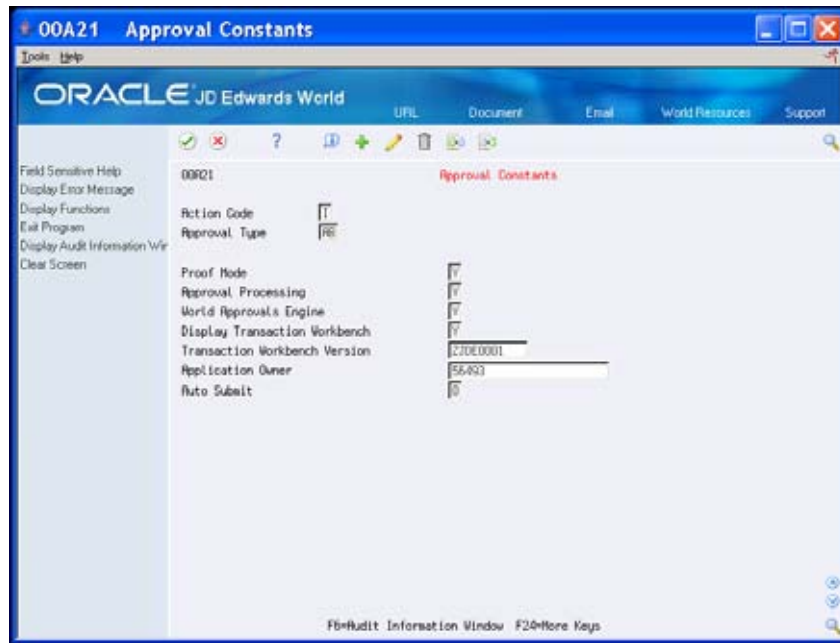


From Approvals Management (G00A), choose **Hidden Selection 29**  
 From Approvals Management Setup(G00A41), choose **Approval Constants**

You must set up the way the system processes approvals for the Address Book system. You use the Approvals Constants program (P00A21) to do so. The system stores the constants in the Approvals Management Constants file (F00A21).

On Approvals Constants, complete the following fields:

- Approval Type
- Proof Mode
- Approval Processing
- World Approvals Engine
- Display Transaction Workbench
- Transaction Workbench Version
- Application Owner
- Auto Submit



Field	Explanation
Approval Type	<p>Select a UDC (81QM), for the Address Book system.</p> <p><i>Screen-specific information</i></p> <p>The approval type specifies to which system this set of approval constants applies. JD Edwards World currently only supports approvals for the Address Book system.</p>
Proof Mode	<p>A code that determines if proof mode is turned on for a given approval type. In proof mode, all master file information is written to work files. The information stays in the work files until the transaction is submitted. Once submitted, the information is committed to the master files.</p> <p><i>Screen-specific information</i></p> <p>Set this field to Y to activate proof mode. Activating proof mode allows users to change records in the system without affecting production data. Changes do not appear in production until the originating user submits the changes to production. JD Edwards World does not recommend that users activate and deactivate this setting frequently. All users accessing the Approvals Management system must sign off and sign on whenever this flag is changes.</p>

Field	Explanation
Approval Processing	<p>A code that determines if approval processing is turned on for a given approval type. Proof mode must be turned on if approval processing is turned on.</p> <p><i>Screen-specific information</i></p> <p>Set this field to Y to activate approval processing for a given system. When you activate Approval Processing field, you must also activate the Proof Mode field. JD Edwards World does not recommend that users activate and deactivate this setting frequently. All users accessing the Approvals Management system must sign off and sign on whenever this flag changes.</p>
World Approvals Engine	<p>A code that determines if the World Approvals Engine is used to process approvals. *** FUTURE USE ***</p> <p><i>Screen-specific information</i></p> <p>You must set this field to Y if Approval Processing is set to Y.</p>
Display Transaction Workbench	<p>A code that determines if the transaction workbench is displayed after the user exits a maintenance program.</p> <p><i>Screen-specific information</i></p> <p>Set this field to Y to automatically display the Transaction Workbench program (P00A11) when exiting a Maintenance program, version ZJDE0001</p>
Transaction Workbench Version	<p>Identifies a specific set of data selection and sequencing settings for the application. Versions may be named using any combination of alpha and numeric characters. Versions that begin with 'XJDE' or 'ZJDE' are set up by JD Edwards World.</p> <p><i>Screen-specific information</i></p> <p>Enter the version of the Transaction Workbench program (P00A11) the system displays.</p>
Application Owner	<p>The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.</p> <p><i>Screen-specific information</i></p> <p>Enter the employee address number of the application owner. The application owner has special privileges to resolve any issues that might occur during the approval process.</p>



Field	Explanation
Auto Submit	<p>A code that controls when a transaction gets submitted. Valid values are:</p> <p>0 The transaction is not submitted until the user manually submits it from the transaction workbench.</p> <p>1 All open transactions for the user currently accessing the system are automatically submitted whenever the user exits out of a maintenance program and back to the menu.</p> <p><i>Screen-specific information</i></p> <p>Enter 1 to automatically submit all open transactions for a user whenever the user exits a maintenance program.</p>

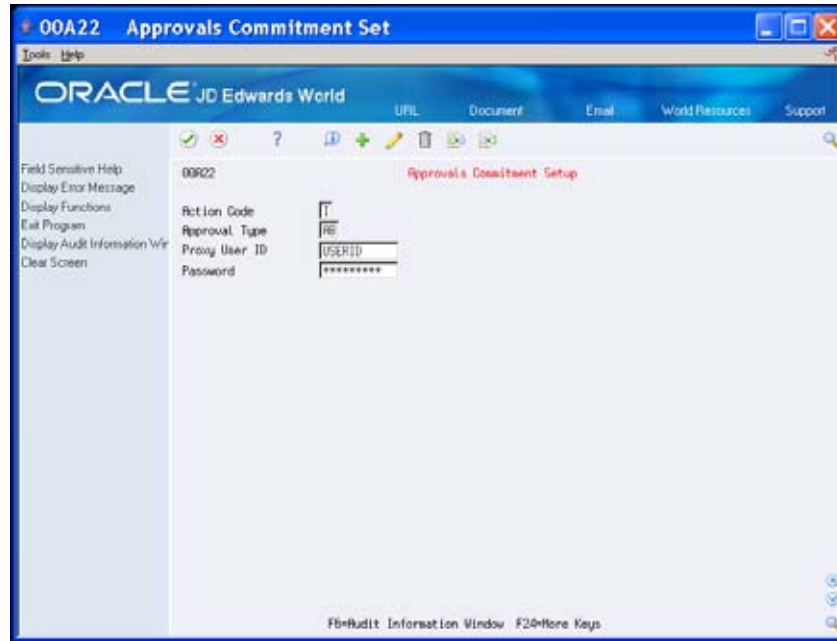
## To set up proxy user



From Approvals Management (G00A), choose **Hidden Selection 27**  
 From Approvals Advanced & Technical Operations(G00A31), choose **Approvals Commitment Setup**

The system moves data in proof mode to production using the JD Edwards World Service Enablement system. The JD Edwards World Service Enablement system requires a valid user ID and password to access the JD Edwards World system. This user ID is referred to as the proxy user id. You specify the proxy user id and password using the Approvals Commitment Setup program (P00A22)

- On Approvals Commitment Setup, complete the following fields:
  - Approval Type
  - Proxy User ID
  - Password



Field	Explanation
Approval Type	<p>Select a UDC (81QM), for the Address Book system.</p> <p><i>Screen-specific information</i></p> <p>Enter the approval type to specify to which system the user ID and password apply.</p>
Proxy User ID	<p>The user ID used by the system to sign on during the commitment phase of Approvals Management.</p> <p><i>Screen-specific information</i></p> <p>The User ID the World Service Enablement system uses.</p>
Password	<p>The password used by the system to sign on during the commitment phase of Approval Management.</p> <p><i>Screen-specific information</i></p> <p>Enter the Proxy User's password.</p>

## To create an output queue for approvals

During daily processing, any errors the World Service Enablement system encounters are written to the APPROVALS output queue. You must create the APPROVALS output queue.

1. Enter CRTOUTQ on the command line and press F4.
2. On Create Output Queue, enter APPROVALS in the following field:
  - Output queue

**Create Output Queue (CRTOUTQ)**

Field Sensitive Help  
Display ErrorMessage  
Display Functions

Type choices, press Enter.

Output queue	Approvals	Name	
Library	*CURLIB	Name	*CURLIB
Maximum spooled file size:		Number	*NONE
Number of pages	*NONE	Time	
Starting time		Time	
Ending time			
* for more values			
Order of files on queue	*FIFO	*FIFO, *JOBNSR	
Remote system	*NONE		

F3=Exit F4=Prompt F5=Refresh F10=Additional parameters F12=Cancel  
F13=How to use this display F24=More keys

## To create a job description

The Approvals Management system calls the Word Service Enablement system in batch mode. The system executes the batch job using the JDEAPPRVL job description. You must create the JDEAPPRVL job description.

1. Enter CRTJOBDD on the command line and press F4.
2. On Create Job Description, access Additional Parameters (F10).

**Create Job Description (CRTJOBDD)**

Field Sensitive Help  
Display ErrorMessage  
Display Functions

Type choices, press Enter.

Job description	JDEAPPRVL	Name	
Library	*CURLIB	Name	*CURLIB
Job queue	*JOBNSR	Name	
Library	*LIBL	Name	*LIBL, *CURLIB
Job priority (on JOBQ)	5	1-9	
Output priority (on OUTQ)	5	1-9	
Print device	*USRPRF	Name	*USRPRF, *SYSVAL
Output queue	Approvals	Name	*USRPRF, *DEV, *WRKSTN
Library	*CURLIB	Name	*LIBL, *CURLIB
Text 'description'			

F3=Exit F4=Prompt F5=Refresh F10=Additional parameters F12=Cancel  
F13=How to use this display F24=More keys

3. Enter JDEAPPRLV in the following field:
  - Job description
4. Enter QGPL in the following field:
  - Library
5. Enter Approvals in the following field:
  - Output queue
6. Enter QGPL in the following field:
  - Library
7. Page down and enter \*NO in the following field:
  - Allow multiple threads

**Create Job Description (CRTJOB)**

Type choices, press Enter.

Inquiry message reply	*NO	*NO, *YFT, *SYSRPL
Hold on job queue	*NO	*NO, *YES
Job date	*SYSWIL	Date, *SYSWIL
Job switches	00000000	Character value
Device recovery action	*SYSWIL	
Time slice end pool	*SYSWIL	*SYSWIL, *NONE, *BASE
Authority	*LIBORTRUT	Name, *LIBORTRUT, *CHANGE
Job message queue maximum size	*SYSWIL	2-64, *SYSWIL
Job message queue full action	*SYSWIL	*SYSWIL, *NOWRAP, *WRAP
Allow multiple threads	*NO	*NO, *YES
Initial RSP group	*NONE	Name, *NONE
Spooled file action	*SYSWIL	*SYSWIL, *KEEP, *DETACH
DDM conversation	*KEEP	*KEEP, *DROP

F3=Exit F4=Prompt F5=Refresh F12=Cancel F13=How to use this display  
F24=More keys  
Messages pending on other displays.

8. Set the balance of the fields to meet your business requirements.

## Configuring Approval Management

You must configure Approval Management system to meet your business requirements. You must configure the groups for approval processing as well as the routes each approval takes in the Approval Management system. You must also set up rules for each approval request and the schedules, which are the rules for each transaction type.

Complete the following tasks:

- [To configure approver groups](#)
- [To configure approver routes](#)
- [To configure approval rule sets](#)

- [To configure approval schedule](#)

## To configure approver groups



From Approvals Management (G00A), choose **Hidden Selection 29**  
 From Approvals Management Setup(G00A41), choose **Approver Groups**

You must configure approver groups for the Address Book system. You use the Approver Groups program (P00A18) to do so. The system stores the approver groups in the Approver Group file (F00A18).

1. On Approver Groups, complete the following fields:

- Approver Group Name
- Description
- And/Or
- Responsible Person
- Role

2. Complete the following optional fields:

- As of
- Option
- Effective From
- Effective Thru

Field	Explanation
Approver Group	Enter the approver group name.
Description	A 30-digit, free-form, user defined description or remark.
As of	Select a date that this approver group becomes effective.
And/Or	<p>A code that determines whether compound data selection logic is based on an A = AND condition or an O = OR condition. Valid values are:</p> <p>I – If</p> <p>A – And</p> <p>O – Or</p> <p>* - Then</p> <p>E – Else (catch all)</p> <p><i>Screen-specific information</i></p> <p>I, *, and E are not valid values for approver groups.</p> <p>You cannot use 'If then' selection logic in approver groups.</p> <p>Use A and O to group approvers. For example, you can require Sue and Frank or Bob and Sally to approve the approval request.</p>
Responsible Person	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.
Role	<p>A code that determines whether an approver is required to approve an approval request. Valid values are:</p> <p>A = Approver must approve or reject an approval request.</p> <p>N = Approver only receives e-mail notification of an approval request. The user is not required to approve or reject the approval request.</p> <p>R = Designates that the value entered into the Responsible Person field is an approver route.</p>
Option	<p>Enter a value. Valid values are:</p> <p>1 – Insert line</p> <p>2 – Audit Information window</p> <p>9 – Delete/Cancel</p>

## To configure approver routes



From Approvals Management (G00A), choose **Hidden Selection 29**  
From Approvals Management Setup(G00A41), choose **Approver Routes**

An approver route is a list of approvers that can add a level on an approver rule set. Approver routes include levels that allow approvers to reside in a hierarchy. Using levels on an approver route enforces the order in which approvers can approve an approval request. For example, you want approver A to approve the request before approver B. You create an Approver Route with two levels. Assign approver A to the first level and approver B to the second level.

You must configure approver routes for the Address Book system. You use the Approver Routes program (P00A19) to do so. The system stores the approver routes in the Approver Route file (F00A19).

1. On Approver Routes, complete the following fields:

- Route Name
- Description
- And/Or
- Level
- Role
- Assignee

2. Complete the following optional fields:

- As of
- Option
- Effective From
- Effective Thru

Field	Explanation
Route Name	Enter the route name.
Description	A 30-digit, free-form, user defined description or remark.
As of	Select a date that this approver group becomes effective.
And/Or	<p>A code that determines whether compound data selection logic is based on an A = AND condition or an O = OR condition. Valid values are:</p> <p>I – If</p> <p>A – And</p> <p>O – Or</p> <p>* - Then</p> <p>E – Else (catch all)</p> <p><i>Screen-specific information</i></p> <p>I, *, and E are not valid values for approver routes.</p> <p>You cannot use 'If then' selection logic in approver routes.</p> <p>Use A and O to group approvers. For example, you can require Sue and Frank or Bob and Sally to approve the approval request</p>
Level	The current level of the approval request. The assigned approver list on an approval request can be setup using levels. Levels allow for a hierarchy of approvers to be setup for an approval request. All approvers on one level are sent e-mail notification at the same time. The next level of approvers will be e-mailed after all approvers on the current level approve the approval request.
Role	<p>A code that determines whether an approver is required to approve an approval request. Valid values are:</p> <p>A = Approver must approve or reject an approval request.</p> <p>N = Approver only receives e-mail notification of an approval request. The user is not required to approve or reject the approval request.</p> <p>G = Designates that the value entered into the Assignee field is an approver group.</p>
Assignee	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.
Option	<p>Enter a value. Valid values are:</p> <p>1 – Insert line</p> <p>2 – Audit Information window</p> <p>9 – Delete/Cancel</p>



## To configure approval rule sets



From Approvals Management (G00A), choose **Hidden Selection 29**  
 From Approvals Management Setup(G00A41), choose **Approval Rule Set**

The approval rule set defines the conditions that you require for the system to create an approval request. For example, you have a new employee and want to generate an approval request each time the new employee makes changes in the Address Book system.

You must configure approval rule set for the Address Book system. You use the Approver Rule Set program (P00A17) to do so. The system stores the approval rules in the Approvals Rule Set file (F00A17).

1. On Approval Rule Set, complete the following fields:

- Rule Set Name
- Description
- Approval Type
- Sel (And/Or selection)
- File
- Field
- Rel (relationship)
- Value
- R (role)
- Assignee

2. Complete the following optional fields:


- As of
- Option
- Effective From
- Effective Thru
- Skip To

Field	Explanation
Rule Set Name	Enter the rule set name.
Description	A 30-digit, free-form, user defined description or remark.
Approval Type	Select a UDC (00/AT), for the Address Book system. <i>Screen-specific information</i> The approval type specifies to which system this set of approval constants applies. JD Edwards World currently only supports approvals for the Address Book system.
As of	Select a date that this approver group becomes effective.
Sel	A code that determines whether compound data selection logic is based on an A = AND condition or an O = OR condition. Valid values are: I – If A – And O – Or * - Then E – Else (catch all) <i>Screen-specific information</i> O, is not a valid value for approval rule sets. You can set up an equivalent Or selection. Add another rule immediately following the rule this utilized the Or logic.

Field	Explanation
File	Select a UDC (00/BF), for the file in the rule. When a user makes changes to this file, the system generates an approval request.
Field	When you specify a file in the File field, the File Field Description window (98FFD) displays. This allows you to select a field to evaluate. The file in the File field determines which fields you can evaluate.
Rel	<p>A code that indicates the relationship in the approval rule set definition. Valid values are:</p> <p>EQ = Equal to</p> <p>LT = Less than</p> <p>LE = Less than or equal to</p> <p>GT = Greater than</p> <p>GE = Greater than or equal to</p> <p>NE = Not equal to</p>
Value	<p>A free-form, alphanumeric field used to store the approval rule value.</p> <p>There are a number of special values you may use in this field, as follows:</p> <p>*ADD = Any add transaction for the file will evaluate "true".</p> <p>*CHANGE = Any change transaction for the file will evaluate "true".</p> <p>*DELETE = Any delete transaction for the file will evaluate "true".</p> <p>*PRIOR = Compares a field to its pre-change value.</p> <p>*BLANK = Field is compared to a value of all blanks. Use this only with alphanumeric fields.</p> <p>*ZERO = Field is compared to a value of zero. Use this only with numeric fields.</p>
Role	<p>A code that determines whether an approver is required to approve an approval request. Valid values are:</p> <p>A = Approver must approve or reject an approval request.</p> <p>N = Approver only receives e-mail notification of an approval request. The user is not required to approve or reject the approval request.</p> <p>G = Designates that the value entered into the Person/Group/Route field is an approver group.</p> <p>R = Designates that the value entered into the Person/Group/Route field is an approver route.</p>

Field	Explanation
Assignee	The text that names or describes an address. This 40-character alphabetic field appears on a number of forms and reports. You can enter dashes, commas, and other special characters, but the system cannot search on them when you use this field to search for a name.
Option	Enter a value. Valid values are: 1 – Insert line 2 – Audit Information window 9 – Delete/Cancel

## To configure approval schedule

	From Approvals Management (G00A), choose <b>Hidden Selection 29</b> From Approvals Management Setup(G00A41), choose <b>Approval Schedule</b>
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You use the approval schedule to assign approval rule sets to a type of action a user performs, add, change, delete, and so forth. For example, you might only want to approve any records a user adds and changes and not the records that a user deletes. You assign the approval rule set to Address Book add and Address Book change schedules.

You must configure approval schedule for the Address Book system. You use the Approver Schedule program (P00A20) to do so. The system stores the approval rules in the Approval Schedule file (F00A20).

**1. On Approval Schedule, complete any the following fields:**

- Transaction Type
- Sequence Number
- Rule Set Name
- Option

00A20 Approval Schedule

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Clear Screen

00A20

Action Code

Transaction Type

Sequence Number	Rule Set Name	Rule Set Description	0

Opt: 1=Insert Line 2=Rule Set 3=Audit Information 9=Delete Line F24=More

Field	Explanation
Transaction Type	Select a UDC (00/TN), for the type of action a user performs in the Address Book.
Sequence Number	Used to store a record's sequence within a file.
Rule Set Name	Enter the rule set name.
Option	Enter a value. Valid values are: <ul style="list-style-type: none"> <li>1 – Insert line</li> <li>2 – Exit to Approval Rule Set</li> <li>3 – Audit Information window</li> <li>9 – Delete/Cancel</li> </ul>



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# Process Approvals

## Processing Approvals

As users make changes to records in the system, the system places those records into workfiles until the user submits changes. The approvals management system automatically creates a unique transaction number to track changes throughout the approvals process.

There are three types of transactions; Add, Change, and Delete. These transactions are an entity in the system, which consists of a group of records in multiple related files. Add transactions involve the addition of a new entity to the system. For example, when a user adds an Address Book entry it becomes a new record in the Address Book Master (F0101) file and might also contain information in a related record such as Address Book Who's Who (F0111). Change transactions involve any changes a user makes to the entity, including the addition and deletion of any records related to the entity. For example, in the Address Book system, a change transaction might include any changes a user makes to the F0101 record, any changes to a related record such as Address Book Who's Who (F0111) or Address Book - Contact Phone Numbers (F0115), or the addition or deletion of any other related record. Delete transactions involve the deletion of an entity in the system. For example, in the Address Book system, a delete transaction might involve deleting the Address Book entry itself, or the F0101 record.

The transaction number and type appear at the bottom of a revisions screen during inquiry. JD Edwards World determines which revisions programs are part of the approvals management process. Only one open transaction can exist per user (the user that originates the change) and entity. The system stores the entities from a revisions program in the approval work files. The system does not move the entities to production until a user submits the transaction and the appropriate individual approves the transaction. However, if the user accesses a revisions program from another program, not from the menu, the system enters the changes directly into production and these changes bypass all approval processing. For example, you can access the Address Book Addition window from Sales Order Entry (P4210). JD Edwards World recommends that you disable access to the revisions programs using function key security when approvals processing is active.

You can view transaction information in the Transaction Workbench (P00A11). You can also perform actions on transactions such as submit, close, reopen, and so forth. Only the user who originates the transaction or the application owner that you define in the Approval Constants can view or modify a transaction from the Transaction Workbench. You can view and maintain any type of transaction in the Transaction Workbench.

The approval management system integrates only with the Address Book system. The following programs are Address Book revision programs:

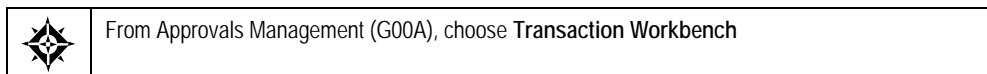
Bank Account Cross-Reference P0030  
Related Address Revisions P01017  
Address Book - Email / URL addresses P01018  
AB - Email / URL Selection P01018S  
Address Book Revisions P01051  
Address Book - Category Codes P010512  
Additional Address Book Information P010513  
Address Book - Socio-Economic Information P010514  
A/R Information P01053  
Accounts Payable Information P01054  
Phone Book Information P01075  
Who's Who Information P0111  
Who's Who Information Window P0111W  
Address Revisions P0116

## Processing Approvals

To process approvals in the JD Edwards World Approvals Management system, complete the following tasks:

- Process Approvals
- Review Approvals
- Review Assigned Approvers
- Substitute Approvers
- Permanently Replace Approvers
- Troubleshoot Approvals

### To process approvals



To locate transactions, you use the Transaction Workbench program (P00A11). The workbench allows you to view all types of transactions and the user that made the change.

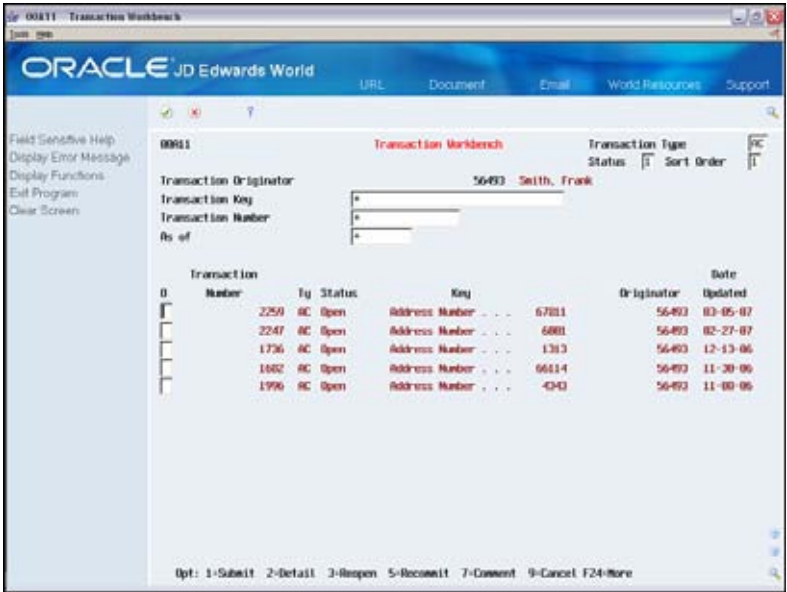
Your view of the Transaction Workbench screen might appear differently based on how you set the processing options.

1. On Transaction Workbench, complete any of the following fields:

- Transaction Type
- Status



- Sort Order
- Transaction Originator
- Transaction Key
- Transaction Number
- As of



Complete the following field:

- Option

Field	Explanation
Transaction Type	Enter a UDC (00/TN), for the type of transaction.

Field	Explanation
Status	<p>A code used to define the status of a transaction. Valid values include:</p> <ul style="list-style-type: none"><li>1 – Open. The initial status of a transaction. An open transaction can either be submitted to production, or canceled.</li><li>2 – Pending. Transaction is waiting for approval. A pending transaction can either be approved or rejected.</li><li>3 – Commit. Transaction is in the process of being posted to the production database. The system sets the status to commit right before calling the transaction post program. If the transaction stays at a commit status for a long time, or never advances past a commit status, the post program ends abnormally. If the post program ends abnormally, the status will stay at a commit status. If the post program ends normally, but an error occurred during post, the status will advance to 7 (Error). If the post program ends normally and no errors occurred during post, the status will advance to 4 (posted). If an error has occurred, and the status has not advanced beyond commit, the transaction can either be recommitted or canceled.</li><li>4 – Posted. Transaction has been posted to the production database. No further action required.</li><li>5 – Closed. Transaction has been canceled. No further action required. A closed transaction can be reopened. When a transaction is reopened, the system creates a new transaction number and copies the detail from the original transaction to the new transaction. The original transaction stays at a closed status. The new transaction is set to an open status.</li><li>6 – Rejected. Transaction has been rejected. No further action required. A rejected transaction can be reopened. When a transaction is reopened, the system creates a new transaction number and copies the detail from the original transaction to the new transaction. The original transaction stays at a rejected status. The new transaction is set to an open status.</li><li>7 – Error. An error occurred while processing the transaction. A transaction at an error status can be recommitted or canceled.</li><li>8 - System Reject - The system has rejected the transaction. This occurs whenever the transaction is in conflict with another transaction being committed. A transaction at a system reject status can be reopened. Transactions are in conflict if they both change the same files for the same key. Committing conflicting transactions can cause unexpected results. The system looks for conflicting transactions during the commit process. Any open or pending transactions found in the system that conflicts with the transactions being committed are set to system reject status. For example, transaction 10 and 20 both change Who's Who records for address book number 6001. When the system commits transaction 10, it detects that transaction 20 is in conflict with transaction 10 and sets transaction 20 to system reject status.</li></ul>

Field	Explanation
Sort Order	This controls the order in which records appear when they are sorted by the date last updated. Valid values are:  Blank - Sort the records in ascending order (earliest records first). '0' - Sort the records in ascending order '1' - Sort the records in descending order (most recent records first).
Transaction Originator	Enter the name of the user that initiated the change.
Transaction Key	Composite key used to store the object involved in a transaction. For example, the Address Book number appears in the transaction key for Address Book transactions.
Transaction Number	A number that identifies an original transaction.
As of	Enter a specific date to display documents (orders, bills of material, routings, as applicable) that are effective on or after that date. This field is used for effectivity checking. The current system date is the default, but you can enter any future or past date.

Field	Explanation
Option	<p>Enter a code to complete the transaction.</p> <p>1 – Submit. Enter 1 to submit the transaction. Submitting the transaction initiates the process of moving the transaction data from the workfiles to the production files. You can only submit a transaction if it is at an open (1) status. The transaction will advance to one of the following statuses:</p> <ul style="list-style-type: none"><li>▪ Pending (2): The transaction is pending approval. The system creates an approval request and it must be approved by all approvers before the system moves the data in the transaction from the workfiles to the production files.</li><li>▪ Commit (3): The transaction did not require approval, and the system moves the transaction data from the workfiles to the production files.</li></ul> <p>The transaction status will advance to posted (4) or error (7) once the system moves the transaction data to production. If the status is set to posted, the system moved all transaction data into production. If the status is set to error, an error occurred while moving the transaction data to production. Check error report R00A112 in the APPROVALS out queue for further instructions.</p> <p>Only the transaction originator or application owner can submit a transaction.</p> <p>2 – Detail. Enter 2 to view the transaction detail. The Transaction Workbench program displays a detailed listing of all changes that are part of the transaction. Only the transaction originator or application owner can view the transaction detail.</p> <p>3 – Reopen. Enter a 3 to reopen the transaction. You can only reopen a transaction if the transaction's current status is closed or rejected. Reopening a transaction does not change the original transaction's status to open. Instead, the system creates a new open transaction with all of the changes from the original transaction. Use caution when reopening a transaction. Some changes might not apply and can cause unexpected results. Only the transaction originator or application owner can reopen a transaction.</p> <p>5 – Recommit. Enter a 5 to recommit. You can recommit a transaction if the transaction status is at a commit status and an error occurred during the commit process, or the transaction status is set to error. Use caution when recommitting a transaction. Ensure the original batch job you initiated to commit the transaction has ended before trying to recommit a transaction. Only the transaction originator or application owner can recommit a transaction.</p> <p>7 – Comment. Enter a 7 to add comments to a transaction. The Generic Text Window program (P0016) displays. The text you enter is visible to the assigned approvers on the approval request. Only the transaction originator, application owner, and approvers assigned to the approval request can view the text.</p> <p>9 – Cancel the transaction. Enter a 9 to cancel the transaction. You can only cancel a transaction if it is at an open, error, or commit status. Only the transaction originator or application owner can cancel a transaction.</p>
Date Updated	The date of the last update to the record in the file.

## Processing Options

See [Approvals Transaction Workbench \(P00A11\)](#)

### To review approvals



From Approvals Management (G00A), choose **Approval Workbench**

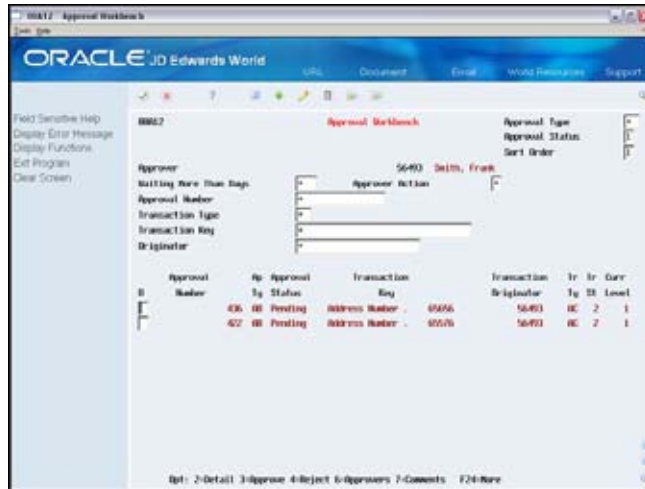
To review approval requests you use the Approval Workbench program (P00A12). The workbench allows you to view and maintain all types of requests.

Transactions and approval requests are separate entities. Depending on how your system is setup, you might not require all transactions to be approved. When a user submits a transaction, the system compares it to all the rules you have assigned to it. When the system determines that one of the rules is true, the system creates a new approval request. The system attaches an approval request to the transaction. When an approval request is approved, all the changes within the transaction are approved. The system attaches only one approval request to one transaction. Likewise, the system assigns only one transaction to one approval request.

Only users that you assign to the approval request or the application owner that you define in the Approval Constants can view or modify an approval request from the Approval Workbench.

1. On Approval Workbench, complete any of the following fields:

- Approval Type
- Approval Status
- Sort Order
- Approver
- Waiting More Than Days
- Approver Action
- Approver Number
- Transaction Type
- Transaction Key



Complete the following field:

- Option

Field	Explanation
Approval Type	Enter a UDC (00/AT), for the type of approval.
Approval Status	<p>Code indicating the status of the approval request. Values are:</p> <ul style="list-style-type: none"> <li>1 - Pending: The approval request is initially set to a pending status. The approval request stays at a pending status until it's approved, rejected, or closed.</li> <li>2 - Approved: The approval request status is set to approved once the final approver has approved the approval request.</li> <li>3 - Rejected: The approval request status is set to rejected once an approver rejects the approval request.</li> <li>4 - System Reject: The system has rejected the approval request. This occurs whenever the transaction associated with the approval request is in conflict with another transaction</li> </ul>
Approver	Enter the name of the individual that approves the transaction.
Waiting More Than Days	Enter a number in this field to limit the display of approval requests based on the number of days they have waited. If you enter a number in this field, the system displays only those approval requests waiting at least that number of days.

Field	Explanation
Approver Action	<p>Code indicating the action of an approver assigned to an approval request. Valid values are:</p> <ul style="list-style-type: none"> <li>1 - Pending: Approval request is waiting for a response from the approver.</li> <li>2 - Approved: Approver has approved the approval request.</li> <li>3 - Rejected: Approver has rejected the approval request.</li> <li>4 - Bypassed: The approval request has bypassed the approver. No further action is required by the approver. The approver can no longer approve or reject the approval request.</li> </ul>
Approval Number	A number that identifies an original approval request.
Option	<p>Enter a code to complete the transaction.</p> <ul style="list-style-type: none"> <li>2 – Detail. Enter a 2 to view the transaction detail. The Transaction Workbench (P00A111) displays with a detailed listing of all changes that are part of the transaction. Only assigned approvers or the application owner can view the transaction detail.</li> <li>3 – Approve. Enter a 3 to approve. The system sets your approver action to approved. If you are the last approver on the approval request, the system sets the approval request status to approved. You can not reject an approval request after you approve it. Only assigned approvers or the application owner can approve an approval request.</li> <li>4 – Reject. Enter a 4 to reject. The system sets your approver action to rejected. The system sets all other assigned approvers action from pending to bypassed. Only assigned approvers or the application owner can reject an approval request.</li> <li>6 – Approvers. Enter a 6 to view the assigned approver list for the request. The Assigned Approvers program (P00A13) displays with a list of all assigned approvers. Only assigned approvers or the application owner can view the assigned approver list.</li> <li>7 – Comments. Enter a 7 to add comments. The Generic Text Window program (P0016) displays. The text you enter is visible to the assigned approvers on the approval request. Only the application owner, and approvers assigned to the approval request can view the text.</li> </ul>

## To review assigned approvers



From Approvals Management (G00A), choose **Approval Workbench**

To review assigned approvers you use the Assigned Approvers program (P00A13). The workbench allows you to view and maintain all types of requests.

The assigned approver list includes all approvers assigned to the approval request. The system generates the assigned approver list based on the assignee that you assign to the rule. When you assign one user to the rule, the system generates the assigned approver list with only that user as the assigned approver. When you assign a group to the rule, the system generates the assigned approver list with all of the users in the group as assigned approvers. When you assign a route to the rule, the system generates the assigned approver list with all the users in the route. When you assign a user or a group to the rule, the system assigns all assigned approvers to level 1. When you assign a route to the rule, the system assigns the assigned approvers to the level they are assigned to on the route.

An approval request has at least one assigned approver. The approver can enter any of the following in the Action field: pending, approved, rejected, or bypassed. An approver's action is initially set to pending when the system creates the approval request. The approver action remains at pending until the approver approves or rejects the approval request. If the approver approves the approval request, the approver action is set to approved. If the approver is the last approver on the approval request, the approval request is set to approved. If the approver is the last approver on a level, the systems advanced the approval request to the next level. If the assigned approver rejects the approval request, the approver action and the approval request status are set to rejected. The system sets all other assigned approvers action from pending to bypassed.

Assigned approvers have roles that define their responsibility for the approval request. Assigned approvers with the role set to approve receive e-mail notification of the approval request and must approve or reject the approval request. Assigned approvers with a role set to notify only receive e-mail notification of the approval request and no action is required. Assigned approvers with a role set to notify have an approver action set to bypassed.

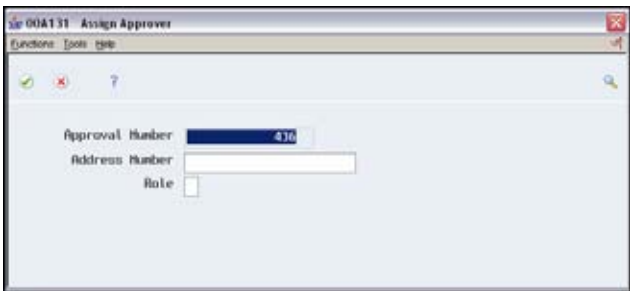
You can assign additional approvers to the approval request by accessing the Assign Approver window (F6) from the Assigned Approver screen. Only users who are on the approver list can assign additional approvers.

1. On Approval Workbench, locate approval requests.
2. Enter 6 in the following field:
  - Option






3. On Assigned Approver, access the Assign Approver window (F6).



4. On Assign Approver, complete the following fields:

- Address Number
- Name

### To substitute approvers

	From Approvals Management (G00A), choose <b>Hidden Selection 29</b> From Approvals Management Setup (G00A41), choose <b>Approver Substitution</b>
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You can substitute approvers for other approvers using the Approver Substitution program (P00A14). The system stores the substitutes in the Approver Substitute Cross Reference file (F00A14). This file includes effective dates that control the duration of the substitution. An approver can have only one substitute approver at any given time. Additionally, an approver can be a substitute for more than one approver.

Approver substitution is a dynamic process. The system does not add the substitute user the assigned approver list until the substitute approver approves or rejects the request. Any substitutes found in the F00A14 appear on the assigned approver list. The system cross references the F00A14 at the time the user inquires on the assigned approver list. In the following example, Wendy is a substitute for Miles and Wendy or Miles can approve the request. If Miles approves the request, his action will change to approved. Wendy no longer appears on the approver list. If Wendy approves the request, the system adds Wendy to the assigned approver list with her action set to approved. The system sets Miles's action to bypassed.

1. On Approver Substitution, locate an approver.


Ap	Substitute	Name	Effect From	Effect Thru	D
00	6-6514	Testaburger, Wendy	10/01/06	12/30/06	

2. Complete the following fields:
  - As of
  - Approver Type
  - Substitute User
  - Effective From
  - Effective Thru
3. Complete the following optional field:
  - Option

Substitute approvers appear directly below the user for which they are substituting on the approver list. The first four characters of the substitute's name include SUB-. The system highlights the address number of the approver and the substitute approver.



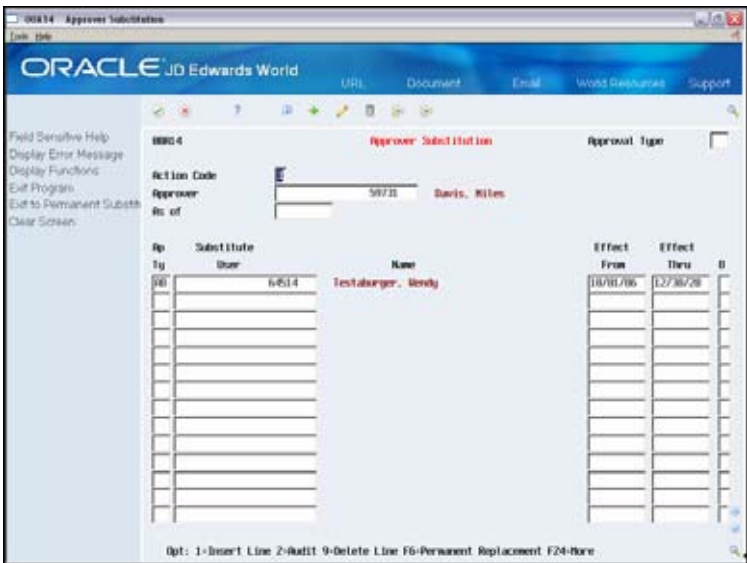
To permanently substitute approvers



From Approvals Management (G00A), choose **Hidden Selection 29**  
From Approvals Management Setup (G00A41), choose **Approver Substitution**

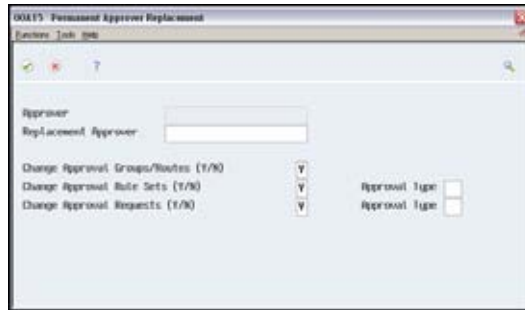
The Permanent Approver Replacement program (P00A15) allows you to permanently replace one approver for another approver. You can perform replacements on approver groups and routes, approval rule sets, and approval requests files. You can only perform the replacement on approval requests that are at a pending status.

1. On Approver Substitution, locate an approver.



2. Access the Permanent Approver Replacement window (F6) and complete the following fields:

- Approver
- Replacement Approver
- Change Approval Groups/Routes
- Change Approval Rule Sets
- Change Approval Requests
- Approval Type



## Troubleshoot Approvals

Issue	Resolve
Transactions are not being created when updates are made to Address Book records.	<ul style="list-style-type: none"><li>▪ Verify that Proof Mode is activated in the Approval Constants.</li><li>▪ If you must activate Proof Mode, you must then sign off and sign on to activate Proof Mode.</li><li>▪ Ensure the current user has a valid Employee Address Number (PPAT) in User Information. Ensure the Employee Address Number is only assigned to one user.</li></ul>
Transaction originator is blank in transaction workbench.	Ensure all users have a valid Employee Address Number (PPAT) in User Information. Ensure the Employee Address Number is only assigned to one user.
Approver does not receive an e-mail.	Ensure the Employee Address Number for the user has a valid e-mail address setup in the Address Book system.

Issue	Resolve
Approval request are not created when the transaction is submitted.	<ul style="list-style-type: none"><li>▪ Verify that Proof Mode and Approvals Processing are activated in the Approval Constants.</li><li>▪ If you must activate Proof Mode and Approvals Processing, you must then sign off and sign on to activate Proof Mode.</li><li>▪ Verify that you have defined the rule sets to create the desired approval request. Verify that you have assigned the rule sets to the correct approval schedule using the Approval Schedule program (P00A20).</li></ul>
Transaction status set to error	<ul style="list-style-type: none"><li>▪ View the R00A12 report in the APPROVALS output queue.</li></ul>



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# Review Release Level and Install History

## Reviewing the JD Edwards World Release Level

You can view all hidden selections by clicking on the Hidden Selection icon.

Hidden selection 25 displays information about the menu specifications.

For example, if you choose Menu Specifications from the Hidden Selection window on the Journal Entry, Reports, & Inquiries menu or enter 25 on the command line, the system displays the menu specifications for that menu.



You can also enter the DSPJDELVL command on a command line to display the JD Edwards World release level. Enter DSPJDELVL and press F4 to display an object release level.

## Reviewing the Install History

Choose Install History Display from the Hidden Selection window or enter 97 on the command line to display information about each cumulative update on your system.

97301 Install History Display

ORACLE JD Edwards World

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Clear Screen

Plan Name	Install Date	Begin Time	End Time	Release Level	PTF Level	OBJ	DATA/SRC	SRC
R07901	08/31/06	19:12:54	19:44:34	R0.1	00000	0	0	0
R07901	08/31/06	17:55:11	18:24:03	R0.1	00000	0	0	0
R01C0EP	08/31/06	0:54:59	10:10:12	R0.1	00000	1	1	1
R01UP05002	09/21/06	17:51:15	17:51:33	R0.1	PCOPY	1	1	1
R01UP05003	09/28/06	15:33:41	15:34:20	R0.1	PCOPY	1	1	1
R01UP05004	10/02/06	9:14:12	9:14:22	R0.1	PCOPY	1	1	1
R01UP05005	10/03/06	10:40:10	10:40:13	R0.1	PCOPY	1	1	1
R01UP05006	10/04/06	14:55:33	14:55:47	R0.1	PCOPY	1	1	1
R01UP05007	10/06/06	10:38:56	10:39:17	R0.1	PCOPY	1	1	1
R01UP05008	10/08/06	10:58:53	10:58:58	R0.1	PCOPY	1	1	1
R01UP05009	10/10/06	9:29:09	9:29:19	R0.1	PCOPY	1	1	1
R01UP05010	10/11/06	9:21:50	9:22:00	R0.1	PCOPY	1	1	1
R01UP05011	10/13/06	10:05:51	10:06:20	R0.1	PCOPY	1	1	1
R01UP05012	10/16/06	10:32:40	10:32:43	R0.1	PCOPY	1	1	1
R01UP05013	10/17/06	13:22:21	13:22:23	R0.1	PCOPY	1	1	1
R01UP05014	10/19/06	15:24:20	15:24:42	R0.1	PCOPY	1	1	1
R01UP05015	10/20/06	12:53:19	12:53:26	R0.1	PCOPY	1	1	1

F3=Exit F24=More

The system provides the following information about cumulative updates:

- Date and time applied
- PTF Level indicates name of cumulative update applied
- Object, data, and source indicates whether this was applied



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## 6 PC Import/Export



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# Work with Import/Export

Many businesses have a need to import data into their JD Edwards World system from programs such as a spreadsheet on a PC and export data from their JD Edwards World system into a spreadsheet or other programs on a PC. This includes Microsoft Excel and other Windows-based spreadsheets. You can import data into your JD Edwards World Software system using the CSV (Comma Separated Values) file format. You can export data from your JD Edwards World Software system to CSV, XML (eXtensible Markup Language), XSD (XML Schema Definition) and TXT (Text) file formats. The XML, XSD, and TXT file formats are available in the PCCPY A918619078 release. Files are imported and exported using the Integrated File System (IFS) on your AS/400, iSeries or System i5 server.

The following UDCs are available in the PCCPY A918619078 release:

- 00/IE
- 00/II
- 00/BE

When you import data from the IFS into your JD Edwards World system, the data *must* undergo the same rigorous editing and security that is inherent in the JD Edwards World Software system prior to entering your system's database. To maintain data integrity, JD Edwards World Software restricts the import to batch input files. After importing, you process records in the batch input files using existing batch updates.

In addition to other methods of importing and exporting data, JD Edwards World provides the following:

Two methods to import data:

- Interactive – from various application programs
- Batch – from an import program

Four methods to export data:

- Interactive – from various application programs
- Batch – from various DREAM Writer report programs
- World Writer – from a spooled World Writer report
- World Writer – directly from the database files

The JD Edwards World system imports the data from the IFS using CSV files. When importing data interactively, the system uses the features of JD Edwards World interactive software programs to control the data editing, security and update capabilities. When importing data in a batch mode, a new batch import program converts CSV file records into World Z file batch update records and thereby enters

data the CVS file into the database as a normal batch transaction. PC applications can access files in IFS directories through network drives you map on your Window PC.

JD Edwards World Software provides CSV files that you can use as spreadsheet templates when importing data into your system. The templates contain column headings and database field names for each column of data in the spreadsheet that you import. The database field name allows the import process to map data from the spreadsheet columns to the corresponding database field in the batch input file or interactive subfile.

Import/Export includes the following tasks:

- [Setting up Import/Export](#)
- [Restricting a User to an IFS Directory and Setting Default CCSID](#)
- [Exporting Data Interactively](#)
- [Importing Data Interactively](#)
- [Exporting Data by Batch](#)
- [Importing Data by Batch](#)
- [Exporting Data Using Spooled World Writer Reports](#)
- [Exporting Data from Database Files Using World Writer](#)
- [Exporting Data from a Locked World Writer or DREAM Writer](#)
- [Troubleshooting Spreadsheet Formatting](#)

## Before You Begin

- JD Edwards World recommends that you review Action Code Security and the security on the IFS before making Import/Export available to users.
- Ensure that you have proper authority before creating an IFS directory.
- You must have a User Display Preferences record before you can set up Import/Export preferences.

## Setting up Import/Export

In order to use Import/Export features, you must have access to a shared directory in the IFS on your AS/400, iSeries or System i5 server. You can then map a network drive to access the shared IFS directory from a Windows PC.

Additionally, there are settings for Import/Export that you access from the User Display Preferences program (P00923) which make Import/Export more convenient to use.

This section includes the following tasks:

- [To create an IFS directory](#)
- [To share an IFS directory using IBM iSeries Access for Windows](#)
- [To share an IFS directory using an IBM iSeries API](#)

- [To map a network drive on your Windows machine](#)
- [To set up Import/Export preferences](#)

## To create an IFS directory

JD Edwards World recommends that you create or use a user directory in the /home directory on the IFS. Each user should have a directory under the /home directory that matches their User Profile Name.

On the iSeries command line, enter CRTDIR DIR(<Directory Path>) DTAAUT(\*RWX) OBJAUT(\*ALL).

Replace <Directory Path> with the path and name of the IFS directory in single quotes. For example, you can enter CRTDIR replacing DIR(<Directory Path>) with DIR('/home/UserID').

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**Note:** The system creates the IFS directory with data using the Coded Character Set ID (CCSID) of the System i job. Usually this is an Extended Binary Coded Decimal Interchange Code (EBCDIC) CCSID such as 37. Because most computers, other than IBM System i and mainframes, use American Standard Code for Information Interchange (ASCII), you must specify a conversion from EBCDIC to ASCII. You can accomplish this by specifying Text Conversion on the properties of the IFS Directory you set up to share. See *To share an IFS directory using IBM iSeries Access for Windows* for more information. If you specify Text Conversion for the directory at the /root or the /root/home level, directories under this also perform the text conversion.

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**Note:** Users can create their own sub-directories within the part of the directory structure to which they have access. The system creates new sub-directories using the CCSID of the System i job, or you can specify the CCSID on DREAM Writer Version ZJDE0001 for Form ID P00923T.

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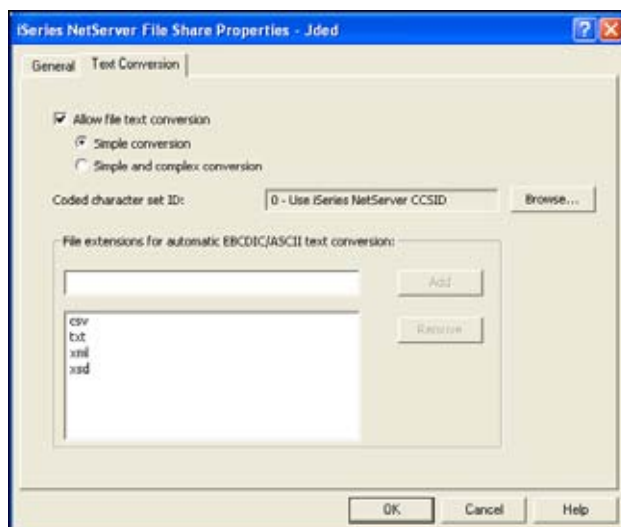
## To share an IFS directory using IBM iSeries Access for Windows

1. Use iSeries Navigator to allow sharing for the new directory. Under the /home directory, use the following path under My Connections:

<iSeries> | File Systems | Integrated File System | Root | Home | <UserID>

Replace <iSeries> with the name or IP address of your iSeries and <UserID> with the name of the IFS directory.

2. Right click on the <UserID>directory.
3. Choose New Share from the Sharing menu.
4. On the General tab, change the Access to Read/Write.
5. To define Text Conversion for a higher level directory, on the Text Conversion tab, choose Allow File Conversion and Simple Conversion.



6. In the File extensions for automatic EBCDIC/ASCII text conversion area, add the file extensions csv, txt, xml and xsd and click OK.

## To share an IFS directory using an IBM iSeries API

If you do not have IBM iSeries Access for Windows installed on your system, you can share an IFS directory using a call to the Add File Server Share (QZLSADFS) API. See the following IBM iSeries NetServer System API reference for more details:

<http://www-03.ibm.com/servers/eserver/iseries/netserver/apidoc.html#hdrzlsaddi>

1. On the iSeries command line, enter CALL QZLSADFS and choose Command Entry Prompt (F4).
2. Enter the following parameters:

Parameter	Explanation
<UserID>	Share name. Use the name of the directory.
<Directory Path>	Path name. Specify the directory path in single quotes, such as '/home/UserID'
<Length>	Length of path name. Enter as X'99999999' replacing the number nine with the actual length of the path name in hexadecimal.
<CCSID>	CCSID Encoding of path name. Enter X'00000000' to use the job default.
<Text Description>	Text description. Enter the directory name.
<Permissions>	Permissions. Enter X'00000002' to allow read/write access.
<Maximum Users>	Maximum users. Enter X'FFFFFFFF' to specify no maximum.

Parameter	Explanation
<Error Code>	Error Code. Enter X'00000000'

Using the UserIDTest sample directory, the format for the call with parameters is as follows:

```
CALL PGM(QZLSADFS) PARM(USERIDTEST '/HOME/USERIDTEST'
X'00000010' X'00000000' USERIDTEST X'00000002' X'FFFFFFFF' X'00000000')
```

You must have the IOSYSCFG special authority to perform this command.

## To map a network drive on your Windows machine

1. In Windows Explorer, from the Tools menu, choose Map Network Drive.

2. Enter or choose a letter in Drive field.

In the following example, the letter “Q” is the Drive letter.

3. Enter the directory path for the IFS directory in the Folder field and press Finish.

Use back slashes in Windows. In the following example, you can replace iSeries with the network machine name or IP Address of your AS/400, iSeries or System i5 server. \home\UserID is the directory path to your shared IFS directory.

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**Note:** You must share any directory that you specify in the directory path. You typically do not need to specify the Root directory in the directory path when mapping to a shared folder.

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4. The system might prompt you to enter your iSeries User ID and password. When doing so, you might need to enter the network Domain or IP address where the iSeries resides to qualify the User ID. Enter the password in lowercase.



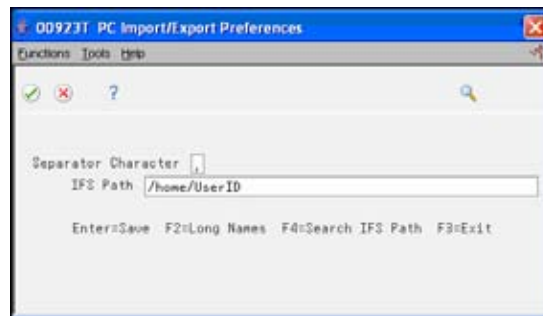
## To set up Import/Export preferences



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Security Officer**  
 From Security Officer (G94), choose **Library List Control**  
 From Library List Control (G944), choose **User Display Preferences**

Setting up User Display Preferences can make using Import/Export more convenient. If you do not set up preferences for Import/Export for a user, the system uses default values.

1. On User Display Preferences, enter your user ID in the following field:
  - User ID
2. Choose Import/Export Preferences (F6).



3. On Import/Export Preferences, complete the following fields:
  - Separator Character
  - IFS Path

For example, you can enter an IFS path as /home/UserID.

Field	Explanation
Separator Character	<p>The character that a spreadsheet, such as Excel will recognize as a data field separator when importing a Comma Separated Value's (CSV) file into a spreadsheet. The system imports each data field into a separate column.</p> <p>If left blank, the system enters a comma (,) as the default if the Decimal Format Character (ULDECF) Field on the User Display Preferences is a period (.). If the Decimal Format Character is comma, the system enters a semicolon (;).</p> <p><i>Screen-specific information</i></p> <p>The most common separator character in North America is comma (,). The Separator Character cannot be the same as the Decimal Format Character on User Display Preferences. For countries that use comma (,) as the Decimal Format Character, you can use a semicolon (;) for the Import/Export Separator Character.</p>



Field	Explanation
IFS Path	<p>The string defining the path to the import/export file on the Integrated File System. For Example: /home/UserID/</p> <p><i>Screen-specific information</i></p> <p>If you use your own IFS directory, enter the IFS Path. You do not need to specify the ROOT directory in this path string. The system enters this path as the default on all Import/Export parameter windows. You can set the IFS Directory Restriction processing option for program P00923T to restrict users to this IFS directory.</p>

## Restricting a User to an IFS Directory and Setting Default CCSID

The functionality for Import/Export uses the root (/) file system on the IFS. There can be many other products, such as Seagull Software or IBM WebSphere, on the IFS which you do not want users to access. IBM recommends general users access the default directory /home. JD Edwards World recommends that you restrict users to the /home directory or a sub-directory under /home.

To access a directory, users must have \*RX (read, execute) access to all directories in the directory path. In addition, you should set the properties to share each directory in the path. JD Edwards World recommends that you set the root (/) and /home directories for \*PUBLIC to \*RX access. Then, set up a sub-directory for each user under /home with full access (\*RWX – read, write, execute) and exclude \*PUBLIC. See the *IFS Security Example* for more information.

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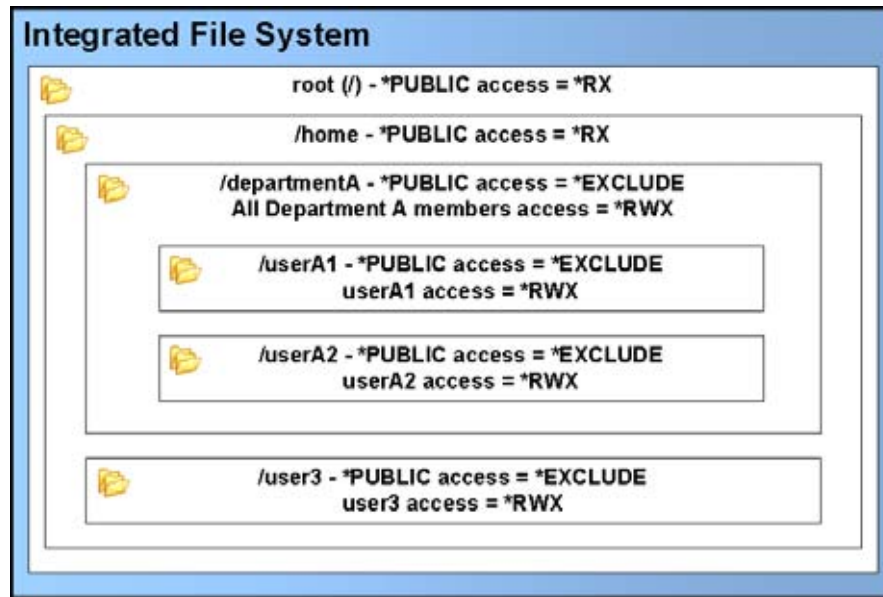
**Note:** You must test your system to ensure that \*RX access by \*PUBLIC to the root (/) and /home directories does not affect the function of other software that exists on the IFS.

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You can also set up directories that team members can share. In this case, you set up a sub-directory under /home with full access for all team members and exclude \*PUBLIC access. You then set up sub-directories under the team directory for each team member with full access. See the *IFS Security Example* for more information.

### IFS Security Example

In the following example, all users have personal directories under /home or a sub-directory under /home. The administrator has \*RWX access to all directories. You can restrict UserA1 and UserA2 to the /departmentA directory or the /home directory, depending on whether public access files reside in the /home directory. You can restrict User3, who is not part of a department, to the /user3 directory or the /home directory, depending on whether public access files reside in the /home directory.



### To restrict users to an IFS directory and set default CCSID

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Run Time Setup</b> From Run Time Setup (G90), choose <b>DREAM Writer</b> From DREAM Writer (G81), choose <b>Versions List</b>
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You can make the IFS directory more secure by restricting user's access to certain IFS directories. If you do not restrict users to a particular IFS directory, they have access through JD Edwards World screens to all directories under the root (/) directory for which they have authority. Setting the IFS Directory Restriction processing option for Import/Export Preferences restricts users to their default directory or sub-directories under their default directory, using JD Edwards World screens.

See *Work with DREAM Writer* for more information about setting up DREAM Writers.

1. On Versions List, enter P00923T in the Form field and click Enter:
2. Enter 2 in the Option field next to the ZJDE0001 Version and click Enter.
3. On the DREAM Writer Menu window, enter 1 in the Option field next to Processing Option Value(s) and click Enter.
4. On Processing Options Revisions, enter Y in IFS Directory Restriction processing option.
5. Optionally, enter a CCSID in the IFS Folder Creation processing option.

The system uses this folder when users create their own sub-directories. You can enter either an EBCDIC or an ASCII CCSID.

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**Note:** If you do not set the IFS Folder Creation processing option, the system creates the IFS directory with data using the CCSID of the System i job.

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**Note:** Restricting users to their default directory does not change the security settings on the IFS directories. Use this restriction in conjunction with secure IFS directories.

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## Exporting Data Interactively

You can use Interactive Export in many of JD Edwards World software programs. Interactive Export is available only in subfile programs because the program can export the entire subfile automatically and you do not need to page through the entire subfile. Interactive export is not available in programs that display one record at a time, as this can be a very time consuming method of exporting data.

You use either a value in the Action Code field or a function key to initiate the Interactive Export from interactive programs. If the program has an Action Code field, you use a T (To PC). If the program is an inquiry only program, the screen does not contain an Action Code field; you choose Export (F23) to initiate the export.

When you export from interactive programs, the system stores the parameter information in the Import/Export Parameters file (F00UDP). When you run an export again from the same interactive programs, you can edit the parameters that you save in the F00UDP.

The interactive subfile programs can display a maximum of 9,999 records at one time. If the system locates more records than the subfile can display, you cannot export all possible data in the database. In this case, you should consider using a batch export instead of an interactive export.

You can export to a CSV file which already includes Import template rows. The Export program recognizes and preserves the template rows. This is useful in situations when you want to create a turnaround document. A turnaround document is a document which you can export, modify the data, and then import the data you modify. When exporting to a template, the Field IDs must be in row 1 or row 4 of the template.

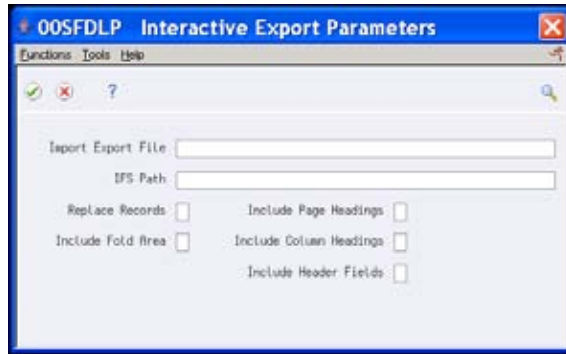
To view a list of programs in which you can use Interactive Export, you can access UDC 00/IE.

### To export data interactively

1. Locate the program from which you want to export data.
2. Complete the appropriate fields to display the data you want to export.

It is not necessary to scroll or position the cursor to a particular position on the screen.

3. Access Interactive Export Parameters (choose Export (F23) or enter T in the Action Code field).



4. Complete the following fields:

- Import Export File
- IFS Path
- Replace Records
- Include Fold Area
- Include Page Headings
- Include Column Headings
- Include Header Fields

You can press F4 to browse the IFS directories and select a file and path.

5. Press Enter to save the parameters.

6. Choose Export (F6) or Continue.

7. Access the IFS and locate the export file.

Field	Explanation
Import Export File	<p>The name of the import/export file located in an IFS directory. You can use the file extensions:</p> <ul style="list-style-type: none"> <li>▪ CSV (Comma Separated Values)</li> <li>▪ XML (eXtensible Markup Language)</li> <li>▪ XSD (XML Schema Definition)</li> <li>▪ TXT (Text)</li> </ul> <p><i>Screen-specific information</i></p> <p>When exporting, you can add to an existing file, replace an existing file or create a new file. If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.</p> <p>If you are exporting to a file with Import template rows, the system preserves these rows even if you enter Y in the replace Records field.</p> <p>Note: If you are exporting to an existing file, the file <i>cannot</i> be open on the PC or the export fails.</p>

Field	Explanation
IFS Path	<p>The string defining the path to the import/export file on the Integrated File System. For Example: /home/UserID.</p> <p><i>Screen-specific information</i></p> <p>You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read/write authority to the directory.</p> <p>If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.</p>
Replace Records	<p>The following are valid values for this field:</p> <p>Y Deletes the file and recreates it with the new set of records.</p> <p>N Appends the new set of records to the current set in the file.</p> <p>1 Deletes and recreates records for the first export, and appends records for subsequent exports, within the same transaction.</p> <p><i>Screen-specific information</i></p> <p>Returning to the menu starts a new transaction.</p>
Include Fold Area	<p>The following are valid values for this field:</p> <p>Y Export fields in the subfile fold area.(Default)</p> <p>N Do not export fields in the subfile fold area.</p> <p><i>Screen-specific information</i></p> <p>Determine if there is a fold area and whether fields in the fold area need to be in the export.</p> <p>Note: The system uses column headings for fields in the fold from Data Dictionary.</p>
Include Page Headings	<p>Determines which report headings are included in the export. Valid values are:</p> <p>Y Include all heading report lines.</p> <p>N Do not include heading report lines.</p> <p>1 Include only the heading report lines from the first page.</p> <p><i>Screen-specific information</i></p> <p>For interactive export, the system uses the fields from the header portion of the screen to generate page headings.</p>

Field	Explanation
Include Column Headings	Determines which column headings are included in the export. Values are:  Y Include all column heading lines.  N Do not include all column heading lines.  1 Include only the column heading lines from the first page.
Include Field Headings	Determines if Header fields should be included in all Detail Records.  Y Header Field values will be included in separate columns in all rows of Detail Records. (This is the default.)  N Header field values will not be included in Detail Records.  <i>Screen-specific information</i>  This field allows you to repeat values from the header portion of the screen on each detail line. This might be necessary if important identifying information displays only in the header portion of the screen.

## Importing Data Interactively

You can use Interactive Import in many of JD Edwards World software programs. Interactive Import is available in subfile programs and programs that display one record at a time. The subfile programs can import the entire subfile automatically and you do not need to page through the entire subfile.

You use an F (From PC) in the Action Code field to initiate the Interactive Import from interactive programs.

When you import to interactive programs, the system stores the parameter information in the Import/Export Parameters file (F00UDP). When you run an import again from the same interactive program, you can edit the parameters that you save in the F00UDP.

Import files must be CSV files. The files must have an Import template row containing data item names that identify the columns. The order of columns in an Import file is not important. Depending on the application program you are importing data to, not all columns require data.

The interactive subfile programs can display a maximum of 9,999 records at one time. If your import generates more than 9,999 records, the program will import to the subfile limit and then pause. You can then process the records in the subfile and run the import again, until you process all records.

If the heading information in your import CSV file changes, the import program will pause. You can then process the records in the subfile and run the import again, until you process all records.

To view a list of programs in which you can use Interactive Import, you can access UDC 00/II.

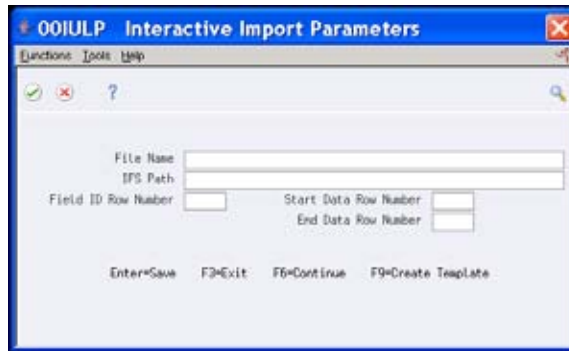
This section includes the following tasks:

- [To create an import template](#)
- [To import data interactively](#)

## To create an import template

You might find it helpful to create a template to use in preparing a CSV file for Import. The template contains the field headers, field names and descriptions to identify columns that the system imports. The system uses only the field names in the import process; the other information is to aid you in identifying columns and the data that you require.

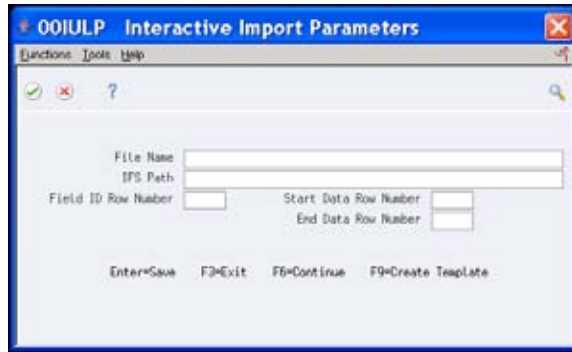
1. Locate the program from which you want to import data.
2. Access Interactive Import Parameters (enter F in the Action Code field).



3. On Interactive Import Parameters, complete the following fields
  - File Name
  - IFS Path
4. Choose Create Template (F9).
5. From your PC, access the CSV template file and add your own information to import.

## To import data interactively

1. Locate the program to which you want to import data.
2. Access Interactive Import Parameters (enter F in the Action Code field).



3. Complete the following fields:

- File Name
- IFS Path
- Field ID Row Number
- Start Data Row Number
- End Data Row Number

You can press F4 to browse the IFS directories and select a file and path.

4. Save (Enter) and Continue (F6).

The system enters the data in the appropriate fields from the spreadsheet.

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**Note:** The import might not load all of the data from the spreadsheet. If the system detects a change in header information, you receive a message stating Group of records imported (JDE0517). Add the first group of records and then run the import again. The import begins from the point in the spreadsheet where the import ceased. A similar situation occurs if you try to import more than 9,998 records at one time.

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5. Enter A in the following field:

- Action Code

The system validates and adds the import records. Some programs allow change as well as add.

Field	Explanation
File Name	The name of the import/export file located in an IFS directory. The file extension must be .CSV.
	<i>Screen-specific information</i>
	The file must exist in the IFS. If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.



Field	Explanation
IFS Path	<p>The string defining the path to the import/export file on the Integrated File System. For Example: /home/UserID.</p> <p><i>Screen-specific information</i></p> <p>You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read/write authority to the directory.</p> <p>If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.</p>
Field ID Row Number	Designates the row in an import file that contains field identifiers for each column of data. If field identifiers were in the first row, this value would be 1. The default value is 4.
Start Data Row Number	Designates the starting row number in an import file that contains column data to be imported. A value of 100 would indicate that data import would begin at row 100 in the import file. The default value is 5.
End Data Row Number	<p>Designates the ending row in an import file that contains column data to be imported. A value of 200 would indicate that data import would terminate after processing row 200 in the import file.</p> <p><i>Screen-specific information</i></p> <p>The default value is 65536, the maximum number of rows in an Excel spreadsheet in Microsoft Office 2003.</p> <p>The value 99999 instructs the program to import records to the end of the CSV file.</p>

## Exporting Data by Batch

Batch Export is available in many of the batch application report programs. Batch Export uses the report you create from a DREAM Writer to create or update an export file on the PC.

The Import/Export Parameters file (F00UDP) contains the parameters for spooled file export processing. The system stores the parameters for a particular report version with the DREAM Writer version. You can access these from the Additional Parameters screen in the DREAM Writer Version List.

The Enabled Y/N field on the Spooled File Export Parm's window allows you to export a DREAM Writer version. The system activates the Spooled File Export program (P00SPDL) at the end of the batch reporting application if the Enabled Y/N field is set to Y.


When you run a DREAM Writer version with the Enabled Y/N field set to Y for export, the system produces the report with export tags to the right of each report

line. The system uses the tags to produce the Export file. The export tags identify different types of report lines, such as page headings, column headings, summary, detail and total lines. You specify whether you want each type of line to export on the Spooled File Export Params window.

You might want to run a DREAM Writer version to produce only the report without exporting the data. If you are running the DREAM Writer Version for the report only without exporting the data, you can hide the export tags by setting the Enabled Y/N field to N and running the DREAM Writer version.

To view a list of programs in which you can use Batch Export, you can access UDC 00/BE.

## To export data by batch

	From DREAM Writer (G81), choose Version List
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1. On Version List, locate the version you want to export to a spreadsheet.
2. Change the version and access the Additional Parameters screen.
3. On Additional Parameters, choose Batch Export Parameters (F6).



4. On Spooled File Export Parameters, complete the following fields:
  - Import Export File
  - IFS Path
  - Enable Y/N
  - Replace Record
  - Include Underline
  - Include Text Lines
  - Include Blank Lines
  - Include Page Headings
  - Include Column Headings
  - Include Detail Lines

- Include Total Lines
- Include Header Fields

You can press F4 to browse the IFS directories and select a file and path.

5. Save (Enter) the parameters.
6. Run the version.
7. Access the IFS and locate the export file.

Field	Explanation
File Name	<p>The name of the import/export file located in an IFS directory. You can use the file extensions:</p> <ul style="list-style-type: none"> <li>▪ CSV (Comma Separated Values)</li> <li>▪ XML (eXtensible Markup Language)</li> <li>▪ XSD (XML Schema Definition)</li> <li>▪ TXT (Text)</li> </ul> <p style="text-align: right;"><i>Screen-specific information</i></p> <p>If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.</p> <p>When exporting, you can add to an existing file, replace an existing file or create a new file.</p>
IFS Path	<p>The string defining the path to the import/export file on the Integrated File System. For Example: /home/UserID.</p> <p style="text-align: right;"><i>Screen-specific information</i></p> <p>You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read/write authority to the directory.</p> <p>If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.</p>
Enable Y/N	<p>The system uses the value in this field to determine whether a process is enabled (Y) or disabled (N). Blank is also a valid value.</p> <p style="text-align: right;"><i>Screen-specific information</i></p> <p>Setting this field to N disables the export process. To run the export and include a printed copy of the report without the export tags, you must submit the version twice. Submit the version once with this field set to Y and again with this field set to N. The Maximum Form Width in the Printer Overrides must be set to the correct form width in order to print the report without the export tags. If the correct form width is not known, use blanks for the form width and the export process determines the correct value.</p>

Field	Explanation
Replace Records	<p>The following are valid values for this field:</p> <p>Y Deletes the file and recreates it with the new set of records.</p> <p>N Appends the new set of records to the current set in the file.</p> <p>1 In batch export, the system deletes the file and recreates it with the new set of records.</p>
Include Underline	<p>Determines whether underlines are included in the Export. Values are:</p> <p>Y Include underlines. (Default)</p> <p>N Do not include underlines.</p>
Include Text Lines	<p>Determines which text lines are included in the Export. Values are:</p> <p>Y Include text report lines. (Default)</p> <p>N Do not include text report lines.</p>
Include Blanks	<p>Determines whether blank lines are included in the Export. Values are:</p> <p>Y Include blank report lines from reports in the Export. (Default)</p> <p>N Do not include blank report lines.</p>
Include Page Headings	<p>Determines whether report headings are included in the export:</p> <p>Y Include all heading report lines.</p> <p>N Do not include heading report lines.</p> <p>1 Include only the heading report lines from the first page.</p>
Include Column Headings	<p>Determines whether column headings are included in the export. Values are:</p> <p>Y Include all column heading lines.</p> <p>N Do not include all column heading lines.</p> <p>1 Include only the column heading lines from the first page.</p>
Include Detail Lines	<p>Determines whether detail lines are included in the Export. The following are valid values for this field:</p> <p>Y Export detail print lines from the report (Default)</p> <p>N Do not export detail print lines from the report</p>
Include Total Lines	<p>Determines whether total lines are included in the Export. The following are valid values for this field:</p> <p>Y Export total print lines from the report (Default)</p> <p>N Do not export total print lines from the report</p>

Field	Explanation
Include Header Lines	Determines if header fields should be included in all detail rows.
	Y Header Field values will be included in separate columns in all rows of Detail Records. (This is the default.)
	N Header field values will not be included in Detail Records.

## Importing Data by Batch

Batch Import enables you to import data from a CSV file directly into a JD Edwards World database file. To preserve system integrity, the system controls which files it allows for Batch Import. These files are usually those which have a Z file, EDI or similar process in place to edit the information in a batch mode before updating other files in the database.

The Import/Export Parameters file (F00UDP) contains the parameters for Batch Import processing. There can be one Batch Import parameter record per user.

It is helpful to create a template to use in preparing a CSV file for Batch Import. The template contains the field headers, field names and descriptions to identify columns that the system imports. The system uses only the field names in the import process; the other information is to aid you in identifying columns and the data that you require.

This section includes the following tasks:

- [To create an import template](#)
- [To import data by batch](#)

### To create an import template

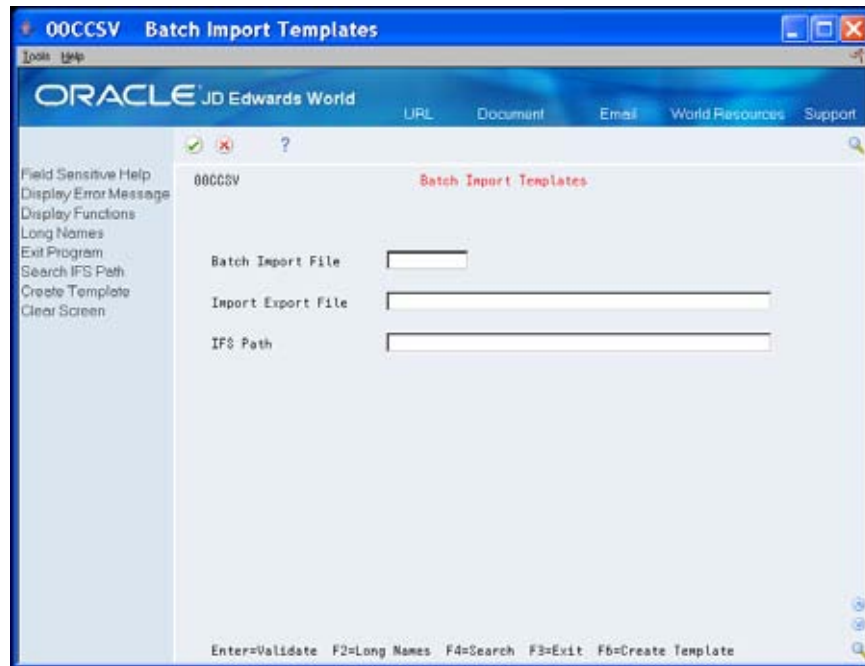


From Master Directory (G), choose **Import/Export**  
 From Import/Export (G00PCIE), choose **Batch Import Templates**

You can use the Batch Import Templates program (P00CRTCSV) to create a spreadsheet template. The system copies the data dictionary column headings, field size, field type, and field name into the template.

1. On Batch Import Templates, complete the following fields:
  - Batch Import File
  - Import Export File
  - IFS Path

You can press F4 to browse the IFS directories and select a file and path.



2. Choose Create Template (F6).
3. From your PC, access the CSV template file and add your own information to import.

Field	Explanation
Batch Import File	Enter a file name, UDC 00/BI, for the file which receives the data during the import process.
Import Export File	The name of the CSV file import template to be created in an IFS directory. The file extension must be '.CSV'. The file name cannot currently exist in the IFS directory. Press F2 to access the Long File/Path Names screen to add or edit long file names.
IFS Path	<p>The string that defines the path to the import template file on the Integrated File System. For Example: /home/UserID.</p> <p><i>Screen-specific information</i></p> <p>You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read/write authority to the directory.</p> <p>If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.</p>

## To import data by batch



From Master Directory (G), choose **Import/Export**  
From Import/Export (G00PCIE), choose **Batch Import from CSV File**

1. On Batch Import from CSV File, complete the following fields:

- Batch Import File
- Import Export File
- IFS Path
- Field ID Row Number
- Start Data Row Number
- End Data Row Number

2. Save (Enter) the parameters.

3. Choose Continue (F6) from the Functions menu.

Field	Explanation
Batch Import File	Enter a file name, UDC 00/BI, for the file which receives the data during the import process.
Import Export File	The name of the import file located in an IFS directory. The file extension must be '.CSV'.
	<i>Screen-specific information</i>
	If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.

Field	Explanation
IFS Path	<p>The string that defines the path to the import template file on the Integrated File System. For Example: /home/UserID.</p> <p><i>Screen-specific information</i></p> <p>You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read/write authority to the directory.</p> <p>If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File/Path Names screen to add or edit long file names.</p>
Field ID Row Number	<p>Designates the row in an import file that contains field identifiers for each column of data. If field identifiers were in the first row, this value would be 1. The default value is 4.</p> <p><i>Screen-specific information</i></p> <p>Enter the number of the CSV file row which contains the field names. These names are used by the import process to identify which columns from the CSV file are to be loaded into which fields in the JD Edwards World file.</p>
Start Data Row Number	<p>Designates the starting row number in an import file that contains column data to be imported. A value of 100 would indicate that data import would begin at row 100 in the import file. The default value is 5.</p>
End Data Row Number	<p>Designates the ending row in an import file that contains column data to be imported. A value of 200 would indicate that data import would terminate after processing row 200 in the import file.</p> <p><i>Screen-specific information</i></p> <p>The default value is 65536, the maximum number of rows in an Excel spreadsheet in Microsoft Office 2003.</p> <p>The value 99999 instructs the program to import records to the end of the CSV file.</p>

## Exporting Data Using Spooled World Writer Reports

You can export data to files on the IFS from a spooled report that you create in a World Writer version. World Writer creates a spooled file which the Export program reads to build an export file, if you enable export for the World Writer Version. World Writer does not require the export tags at the end of print lines. The query report specifications in World Writer allow the system to identify the location and attributes of fields in print lines in the spooled file. For this reason, a World Writer version can export data and produce a printable report simultaneously.



The Import/Export Parameters file (F00UDPW) contains the parameters for spooled file export processing, including World Writer reports.

The World Writer report cannot have text lines that wrap or detail report records which use more than one print line. You can use the entire World Writer report width of 378 characters.

## To export data using World Writer spooled reports

From the World Writer menu (G82), choose a World Writer query group from which you want to export data.

1. Choose or create a version from which you want to export data to a spreadsheet.
2. Change the version and access the Additional Parameters screen.
3. On Additional Parameters, choose Batch Export Parameters (F6).



4. On Spooled File Export Parameters, complete the following fields:

- Import Export File
- IFS Path
- Enable Y/N
- Replace Records
- Include Underlines
- Include Text Lines
- Include Blank Lines
- Include Page Headings
- Include Column Headings
- Include Detail Lines
- Include Total Lines
- Include Header Fields

You can press F4 to browse the IFS directories and select a file and path.

5. Save (Enter) the parameters.

6. Run the version.

## Exporting Data from Database Files Using World Writer

You can export data from database files to files on the IFS from a World Writer version without creating a spooled report. The system uses World Writer join files, data and column selection, and sequencing when building the export file.

The Import/Export Parameters file (F00UDPW) contains the parameters for database file export processing.

When exporting directly to an IFS export file, you can exceed the World Writer report width of 378 characters, because the system does not produce a spooled report.

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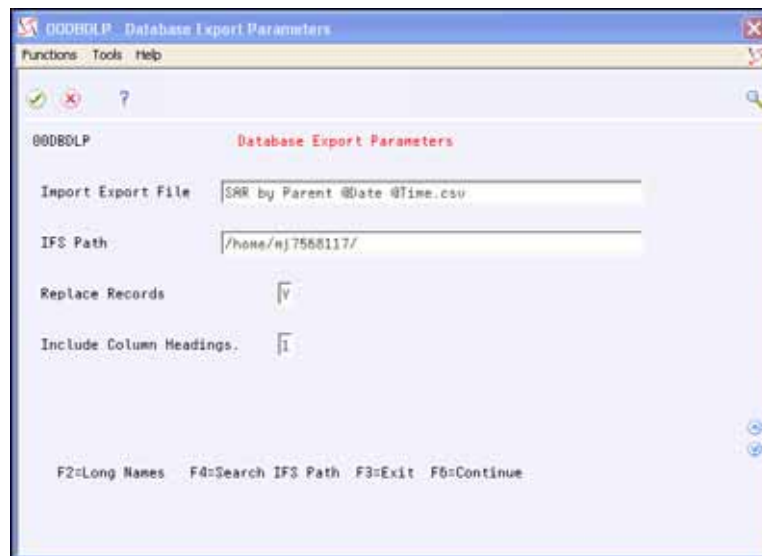
**Note:** The system does not provide for Calculation fields in World Writer when exporting data from database files using World Writer.

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### To export data from database files using World Writer

From the World Writer menu (G82), choose a World Writer query group from which you want to export data.

1. Choose or create the version from which you want to export data to a spreadsheet.
2. Enter 8 in the Option field.



3. On Database Export Parameters, complete the following fields:
  - Import Export File
  - IFS Path

- Replace Records
- Include Column Headings

To locate IFS directories, you can choose Search IFS Path (F4) to access the Directory Search screen and select an IFS directory.

4. Save (Enter) the parameters.
5. Choose Continue (F6) to run the export.

## Exporting Data from a Locked World Writer or DREAM Writer

You might have permission to run DREAM Writer or World Writer versions, but not have permission to change the version if the User Exclusive field in the version is set to restrict access. You can run an Export for these locked (restricted) versions by adding the Spooled File Export Parameters with these programs, instead of using the DREAM Writer Version List screen to add the parameters.

You can run a batch export from a locked World or DREAM Writer version using the World Writer Export Parameters program (P00MPEP) or Spooled File Export Parameters program (P00MPEP). You cannot make changes to the version you are exporting.

This section includes the following tasks:

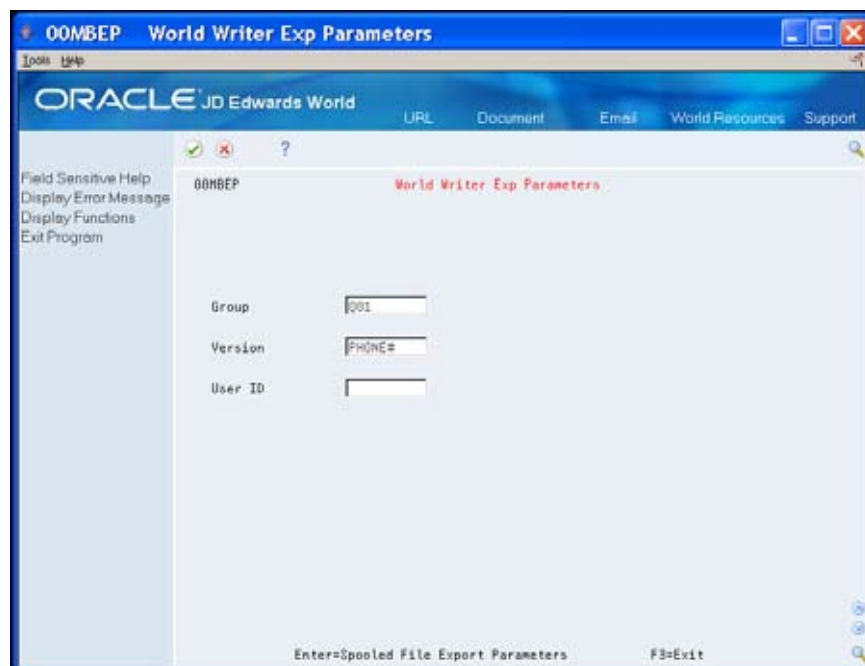
- [To export data from locked World Writer versions](#)
- [To export data from locked DREAM Writer versions](#)

### To export data from locked World Writer versions



From Master Directory (G), choose **Import/Export**  
From Import/Export (G00PCIE), choose **World Writer Export Parameters**

1. On World Writer Export Parameters, complete the following fields and press Enter:
  - Group
  - Version
  - User ID



2. On Spooled File Export Parameters, enter the export parameters.
3. Ensure that you set the Enabled Y/N field to Y.



4. Save (Enter) the parameters.
  5. Run the World Writer version.
- The system exports the data and produces a report.

Field	Explanation
Group	Enter the name of the World Writer query group (UDC 82/GR).
Version	Enter the World Writer version from which you are exporting data.
User ID	Enter the IBM-defined user profile to which you associate the Export parameters.

## To export data from locked DREAM Writer versions



From Master Directory (G), choose **Import/Export**  
 From Import/Export (G00PCIE), choose **Spooled File Export Parameters**

1. On Spooled File Export Parameters, complete the following fields and press Enter:

- Form Name
- Version Path
- User ID

2. On Spooled File Export Parameters, enter the export parameters.
3. Ensure that you set the Enabled Y/N field to Y.

4. Save (Enter) the parameters.
5. Run the DREAM Writer version.

The system exports the data and produces a report.

Field	Explanation
Form Name	Enter the DREAM Writer form name. <i>Screen-specific information</i> You can locate the DREAM Writer form name in the Form field on the Versions List screen.
Version	Enter the DREAM Writer version from which you are exporting data.
User ID	Enter the IBM-defined user profile to which you associate the export parameters.

## Troubleshooting Spreadsheet Formatting

CSV files contain only data and no formatting information. When you open a CSV file with a spreadsheet program, such as Microsoft Excel, the spreadsheet program might use an undesirable format to interpret the data. If the data contains account and business unit numbers, the spreadsheet program might format these with a numeric format rather than in a text format.

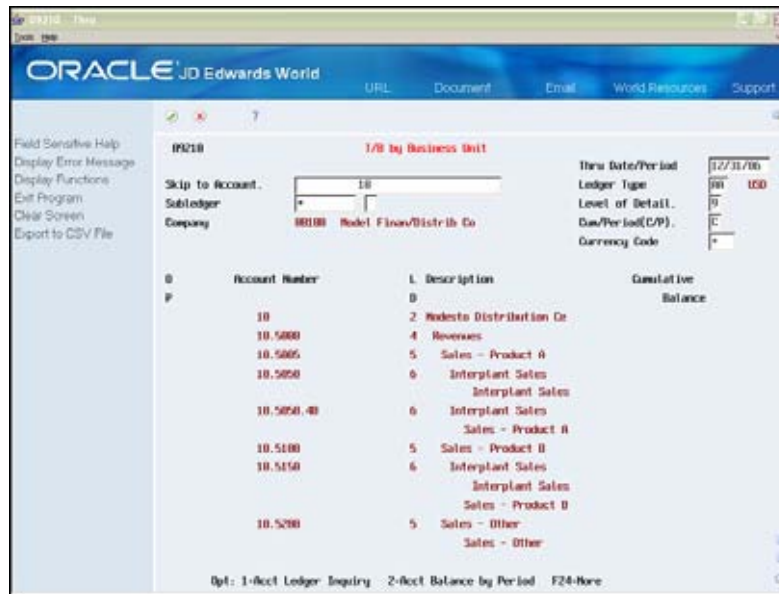
If the spreadsheet program does not interpret the data in a satisfactory manner, we recommend that you import the CSV file rather than opening the file by double clicking the file or using the spreadsheet program's file menu to open the file. Instead, open the spreadsheet program and use the Data Import function to specify the format of the data for the spreadsheet. An example follows.

### Example

Following is an example of an account number formatting issue and the steps you can take to avoid this issue when importing a CSV file into a spreadsheet program, such as Microsoft Excel.

Alternatively, you can export data as an XML file and import data from the XML file into the spreadsheet.

A CSV file contains the information you export from the following screen:

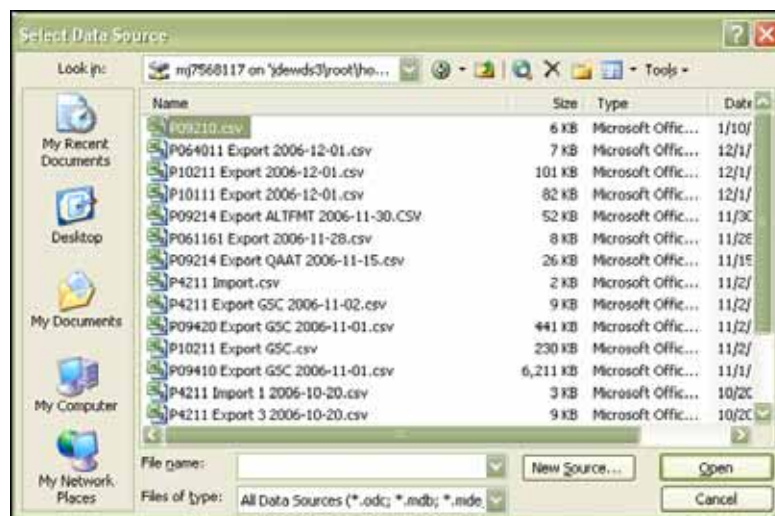


You open the CSV file containing the account information using a spreadsheet. The spreadsheet program processes the account number 10.5000 on the second detail line (line 10) in a numeric format as 10.5 and the account number 10.5050.40 (line 14) in a text format.

O	Account Number	L	Description	Cumulative Balance	Date Thru
P	10	2	Modesto Distribution Ce	0	12/31/06
	10.5	4	Revenues	0	12/31/06
	10.5005	5	Sales - Product A	0	12/31/06
	10.505	6	Interplant Sales	0	12/31/06
	10.5050.40	6	Interplant Sales	0	12/31/06
	10.51	5	Sales - Product B	0	12/31/06
	10.515	6	Interplant Sales	0	12/31/06
			Interplant Sales	0	12/31/06
			Sales - Product B	0	12/31/06

## To specify correct spreadsheet formatting

1. Open Excel and do not specify a file to open.
2. From the Data menu, choose Import External Data and then Import Data.  
The Select Data Source window displays.



- On the Select Data Source window, choose the CSV file to import and choose Open.

The Text Import Wizard displays.



- On Text Import Wizard – Step 1 of 3, choose the Delimited option and click Next.

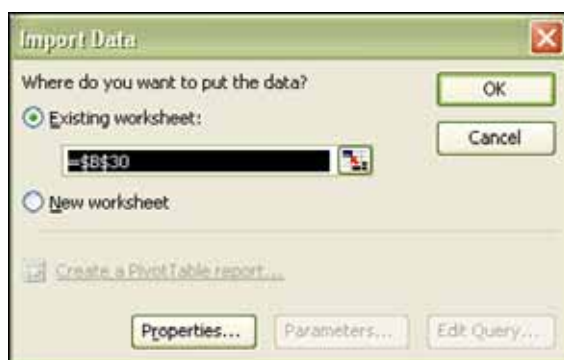




5. On Text Import Wizard – Step 2 of 3, if you are using a comma for the separator character, choose the Comma option under Delimiters. Ensure that the Tab option is clear and click Next.



6. On Text Import Wizard – Step 3 of 3, scroll down the Data preview area until Excel recognizes the columns.
7. Select the column containing Account Number, choose the Text option in the Column data format area and click Finish.



8. On Import Data, click OK.

Excel imports the CSV file data into a new spreadsheet where all of the account numbers appear as text, rather than a mixture of text and numbers.

	A	B	C	D	E	F	G
1		09210	T/B by Business Unit				
2					Thru Date/Period 12/31/06		
3		Skip to Account 10			Ledger Type... AA USD		
4		Subledger... '			Level of Detail: 0		
5		Company... 00100 Model Finan/Distrib Co			Cum/Period(C/P): C		
6					Currency Code: '		
7		O	Account Number	L Description		Cumulative Balance	Date
8		P		D			Thru
9			10	2 Modesto Distribution Ce		0	12/31/2006
10			10.5000	4 Revenues		0	12/31/2006
11			10.5005	5 Sales - Product A		0	12/31/2006
12			10.5050	6 Interplant Sales		0	12/31/2006
13				Interplant Sales		0	12/31/2006
14			10.5050.40	6 Interplant Sales		0	12/31/2006
15				Sales - Product A		0	12/31/2006
16			10.5100	5 Sales - Product B		0	12/31/2006
17			10.5150	6 Interplant Sales		0	12/31/2006
18				Interplant Sales		0	12/31/2006
19				Sales - Product B		0	12/31/2006
20			10.5200	5 Sales - Other		0	12/31/2006
21				Sales - Other		0	12/31/2006
22				Revenues		0	12/31/2006

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# Import/Export Informational Messages

## About Import/Export Informational Messages

During the import and export of data, the system displays informational messages at the bottom of the screen regarding the process. Following are the messages and the explanation for each message.

### Import Messages

Message	Explanation
JDE0502 Import Process Completed Normally	All requested records from the CSV file have been successfully imported.
JDE0503 <b>**ERROR**</b> Import Process Failed	The requested import failed as a result of opening or reading the CSV file.
JDE0504 <b>**WARNING**</b> Maximum subfile lines (9998) exceeded	The import process can process only 9998 lines in one attempt and that was exceeded. Change the Start Data Row Number parameter to resume importing after the last record imported.
JDE0507 Import process aborted but parameters were changed	User pressed F3 in the Import parameter window, aborting the import process but the import parameters were changed.
JDE0508 <b>**ERROR**</b> Import parameters not found	Import parameters were not found for Program/Version/User. Setup the parameters and rerun the import process.
JDE0509 <b>**ERROR**</b> Import Parameter Error	Either the Field ID Row Number is incorrect because invalid field names were found in the row or the Start Data Row Number is greater than the last row in the CSV file.
JDE0510 <b>** ERROR **</b> Separator Character Inconsistent	The separator character in the CSV file is not the same as the one in Import/Export user preferences. Change one of them to be consistent with the other.
JDE0511 Import process aborted and parameters are unchanged	F3 was pressed in the Import parameter window, aborting the import process. The import parameters are unchanged.

Message	Explanation
JDE0514 Template file created successfully	The template CSV file was created successfully in the location specified.
JDE0515 ** ERROR ** Template creation failed	For an interactive import template build, the File Name parameter is not a display file or for a batch import template build, the Batch Import File parameter is not a database file.
JDE0517 Group of records imported	A group of records have been imported. Import stopped at the end of the group because header information has changed. Continue to import without exiting the application to import the next group of records.
JDE0519 **ERROR** Attempt to insert invalid data	The batch import process attempted to insert invalid data into a numeric field. The process aborted.
JDE0520 *ERROR** Unsupported display format	An error was encountered during the import process. The system does not currently support importing of data into this display format.

## Export Messages

Message	Explanation
JDE0500 Export Process Completed Normally. Exit video to close export file	The requested export completed successfully. The file on the IFS remains open until you exit this video.
JDE0501 **Error** Export Process Failed	The requested export failed as a result of opening or writing to the export file. This is most commonly caused by having the file opened in Excel. The file should not be in use by another application when exporting data to it. Improper authority to the IFS directory path could also cause this error condition.
JDE0505 Export aborted but parameters were changed	Changes made to export parameter values in the parameter window were applied but the user pressed F3 to abort running the actual export process.
JDE0506 Export parameters not found	The user did not enter and save parameter values in the export parameter window before running the export.

Message	Explanation
JDE0512 Export process aborted and parameters are unchanged	F3 was pressed in the Export parameter window, aborting the export process. The export parameters are unchanged. To rerun the process, invoke the parameter window again and press F6 to continue with Export
JDE0513 Inquiry required before Export	An interactive application must have issued and inquiry and populated the subfile with data before the export process is initiated
JDE0518 Warning** Export	An interactive application attempted to export more than 9999 subfile records in a single export request. Only 9999 records are written to the export file. This is not a restriction of the export file. The export file can exceed this number by issuing multiple export requests in the application.
JDE0521 Batch Export Process Completed Normally	All data successfully exported to the IFS.
JDE0522 **ERROR** Export Process Failed	An error was encountered during the export process.



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## 7 User Defined Codes





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# Overview to User Defined Codes

## Objectives

- To understand how to locate User Defined Codes (UDCs) identifiers
- To understand how to display a table of UDC values
- To understand how to display a system's UDCs
- To understand how to attach a note to a UDC
- To understand how to translate UDCs

## About UDCs

To tailor a software system to your business needs, you need the capability of assigning your own set of unique codes to a data field.

UDCs are a method of using table values to define the allowed values for an input-capable field without having to recompile a program.

JD Edwards World uses UDCs to provide:

- A table of values used to validate entered data
- A uniform description for each valid value
- A method used in conversion programs

We provide a number of codes with each system, you might need to modify some of these and set up additional ones.

Many fields only accept UDCs. For example, if you enter a code in the Units of Measure field on the Journal Entries form, you can enter only a code that exists in the UDCs list for units of measure. When a JD Edwards World program encounters a UDC field, it checks the data the user enters against the field's table of values. If no match is found, the program issues an error message.



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# Work with User Defined Codes

## Working with User Defined Codes (UCDs)



From Master Directory (G), choose **Hidden Selection 29**  
From General Systems (G00), choose **General User Define Codes**

To work with UDCs, you need to know how to locate them for a field or a system. You'll also find out how to create notes for UDCs and translate them into another language.

This section contains the following:

- [Determining the UDCs Identifiers](#)
- [Working with UDC Values](#)
- [Working with UDC Types](#)
- [Attaching Memo Notes to UDCs](#)
- [Working with User Defined Code Models](#)
- [Translating UDCs](#)
- [Other Function Keys on the General UDCs Screen](#)

## Determining the UDCs Identifiers

Each UDC field is associated with a System Code and UDC Type. When revising UDCs, you will need to know these identifiers.

### To determine the UDCs identifiers

1. Place your cursor in a field on a program screen and click the Help icon (F1).

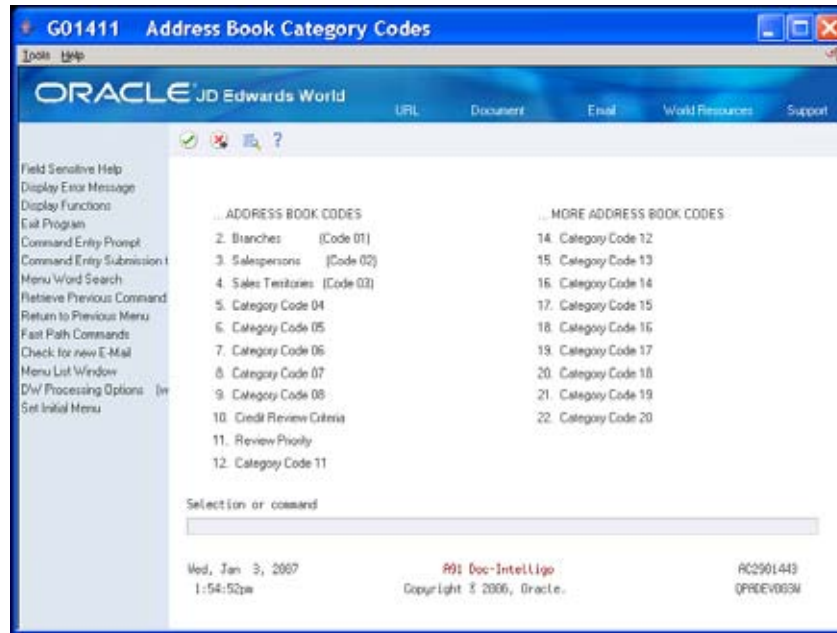
For example, to determine the UDC identifier for the Search Type field on the Address Book Revisions screen, move your cursor to the Search Type field, and click the Help icon (F1).



In the upper left corner of the User Defined Codes screen is the UDC identifier. In this example, the identifier is 01, ST.

- From the Functions menu, choose Sort order switch UDC Code/UDC Description (F6) to toggle the view of the UDC table from either an alphanumeric sequence by UDC code or by the description. To sort by description allows you to locate codes more easily.

In many cases, JD Edwards World assigns logical groupings of UDCs to a particular menu.



## Working with UDC Values

The User Defined Values file is F0005. You can not delete the entire table.

## To review UDC values

On General User Defined Codes, locate a table.

For example, for the Search Type field on Address Book, enter 01 in the System Code field and ST in the User Defined Codes field.

00051 General User Defined Codes

ORACLE JD Edwards World

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details  
User Defined Code Types  
Repository Services  
Redisplay Previously Change  
Memo (Cursor Sensitive)  
Where Used  
Alternate Lang Desc (Cursor  
Print User Defined Codes  
Clear Screen

00051 General User Defined Codes

Action Code: [ ] See Memo

03 Character

Code	Description
A	Applicants
C	Customers
CMQ	Call Management Queue
E	Employees
F	Facilities
I	Investors
J	Jobs
M	Mail Distribution List
MB	Bulletin Board
N	New Hire
O	Company
P	Prospects
Q	Dep/Ben Address
S	Subcontractors

System Code: 01  
User Defined Codes: ST  
Skip To Code: [ ]  
Search Type: [ ]

F5=Code Types F14=Memo F15=Where Used F18=Translate F21=Print F24=More

## To add UDC values

1. On General User Defined Codes, locate a table.

00051 General User Defined Codes

ORACLE JD Edwards World

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
More Details  
User Defined Code Types  
Repository Services  
Redisplay Previously Change  
Memo (Cursor Sensitive)  
Where Used  
Alternate Lang Desc (Cursor  
Print User Defined Codes  
Clear Screen

00051 General User Defined Codes

Action Code: [ ] See Memo

03 Character

Code	Description
A	Applicants
C	Customers
CMQ	Call Management Queue
E	Employees
F	Facilities
I	Investors
J	Jobs
M	Mail Distribution List
MB	Bulletin Board
N	New Hire
O	Company
P	Prospects
Q	Dep/Ben Address
S	Subcontractors

System Code: 01  
User Defined Codes: ST  
Skip To Code: [ ]  
Search Type: [ ]

F5=Code Types F14=Memo F15=Where Used F18=Translate F21=Print F24=More

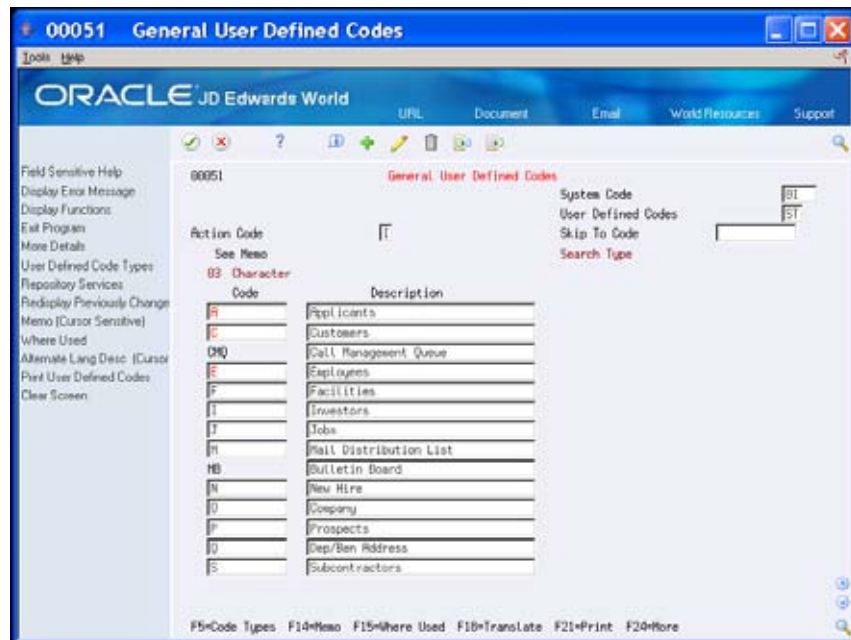
2. Do one of the following:
  - Type the new value and description over the top of one of the existing values—the existing value is still there and will re-display the next time you perform an inquiry
  - Type the new value and description on a blank line
3. Click the Add or Change icon, either action works the same in this case.

## See Also

*Restricting Access* to restrict maintenance and addition of code values.

## To delete UDC values

1. On General User Defined Codes locate a table.



2. Clear all of the information for the value you want to delete.
3. Click Change.

## Working with UDC Types

You can review the entire list of code types for a system. You can add and delete code types, also known as User Defined Codes tables, for a system. The User Defined Codes Types file is F0004.

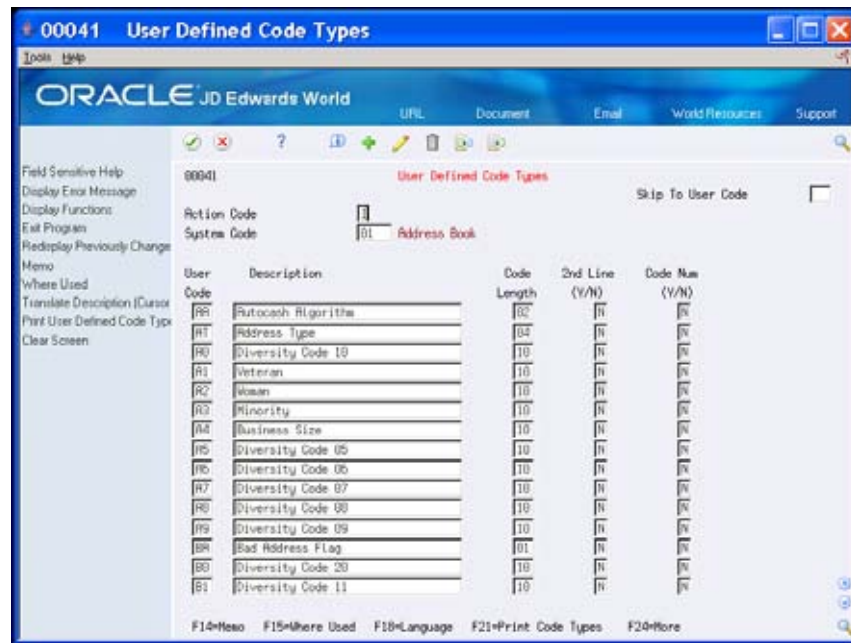
Do not delete the UDC Types that JD Edwards World provides. Deletions require Data Dictionary and programming changes.

The user needs to define the valid values for UDC types. You can print a list of UDCs to see which values you want to change and then revise the values to meet your needs.

## To review UDC types

1. On General User Defined Codes, choose User Defined Code Types (F5).

The User Defined Code Types screen displays.



2. Enter a system code.

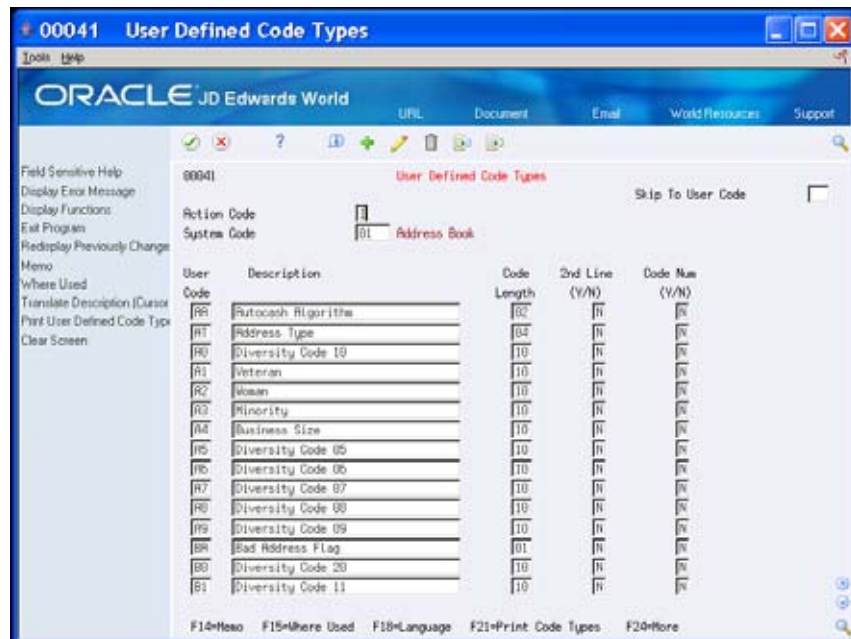
3. Click Inquire.

Field	Explanation
User Defined Codes	Identifies the table which contains user defined codes. The table is also referred to as a code type.
Description	A user defined name or remark that describes a field.
Code Length	The length of the user defined code. It cannot be greater than 10 characters.
Line 2 Desired (Y/N)	A response of Y or M will allow the entry of two lines of User Defined Codes in the revisions screen. A Y will also enable the User Defined Codes window to display a second line of description. M is for maintenance only for second line display. This capability is seldom used, but has applicability in areas such as inventory product codes. The M value will not display the second line of description in the User Defined Codes window.

Field	Explanation
Numeric (Y/N)	Determines whether a user defined code is numeric or alphanumeric.  Valid values are:  Y     Indicates that the code is numeric should be right-justified.  N     Indicates that the code is alphanumeric should be left-justified.

## To add UDC types

1. On General User Defined Codes, choose User Defined Code Types (F5).  
The User Defined Code Types screen displays.
2. Locate the system code that you want.



3. Do one of the following:
  - Type the new information over the top of one of the existing types—the existing type is still there and will re-display the next time you perform an inquiry
  - Type the new information on a blank line
4. Click Add or Change, either action works the same in this case.

## To delete UDC types

1. On General User Defined Codes, choose User Defined Code Types (F5).



The User Defined Code Types screen displays.

2. Locate the system code that you want.

User Code	Description	Code Length	2nd Line (Y/N)	Code Num (Y/N)
R01	Autocash Algorithm	02	N	N
R02	Address Type	04	N	N
R03	Diversity Code 10	10	N	N
R04	Veteran	10	N	N
R05	Woman	10	N	N
R06	Minority	10	N	N
R07	Business Size	10	N	N
R08	Diversity Code 05	10	N	N
R09	Diversity Code 06	10	N	N
R10	Diversity Code 07	10	N	N
R11	Diversity Code 08	10	N	N
R12	Diversity Code 09	10	N	N
R13	Bad Address Flag	01	N	N
R14	Diversity Code 20	10	N	N
R15	Diversity Code 11	10	N	N

3. Clear all of the information of the code type that you want to delete.
4. Click Change.

## Attaching Memo Notes to UDCs

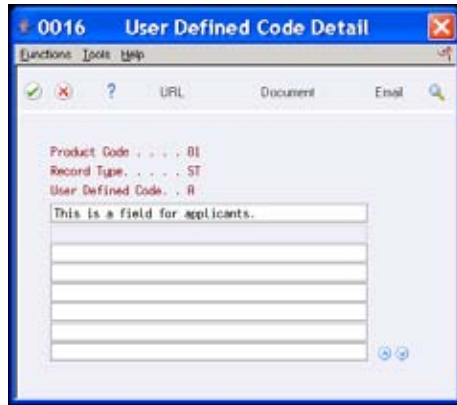
Whenever Memo (F14) displays in the navigation bar or at the bottom of a screen, you can attach electronic notes to provide details about a particular field.

To maintain extensive text, use the Data Dictionary.

### To attach Memo Notes

1. On General User Defined Codes, place the cursor on the appropriate field.
2. Choose Memo (F14).

The User Defined Code Detail window displays.



3. Enter text.

After you enter a note, the words See Memo display near the upper left corner of the General User Defined Codes screen.

4. Choose Memo (F14) to display a previously entered memo.

5. From the Functions menu on the User Defined Code Detail window, do the following:

- Choose Display User & Date of Entry & Update (F6) to see who entered or modified text.
- Choose Delete this Entire Note (F9) to delete the text.
- Choose Select Model Memo (F15) to select a text model.

## Working with User Defined Code Models

A text model is text that you enter and then can access from the User Defined Code Detail, the memo notes, screen of User Defined Codes. You would enter text that you would need for multiple UDCs. You select a model and it displays on the User Defined Code note that you are creating—thus saving you from repeatedly typing the same information.

You can enter up to 32,000 characters of notes in a single screen. The small text screen holds 800 lines of text, 40 characters per line. The large window holds 400 lines of text, 80 characters per line.

This electronic note capability accommodates brief reminders or messages about the field or screen. For more detailed help text, use the Data Dictionary Repository to create detailed Glossary entries for the specific data item.

To change the size of a screen, you choose Toggle Window Size (F2) from the Functions menu. The system opens a screen that is either 40 or 80 characters wide.

To open the User Information screen that displays details about the text entry in the screen, choose Display User & Date of Entry & Update (F6) from the Functions menu. You can also open this window from the Text Model Selection screen using option 6. The system automatically records this information.

Within the screen, you can insert and delete lines. Choose Insert Line at Cursor Location (F8) from the Functions menu to move the text in the screen down one line

from the cursor position. You can insert additional text on the new blank line. Choose Delete Line at Cursor Location (F9) from the Functions menu to delete all text on the same line as the cursor.

You can copy a model so that you can use its information in creating a new model.

To work with models on the User Defined Code Detail screen. See *Attaching Memo Notes to UDCs* for access information.

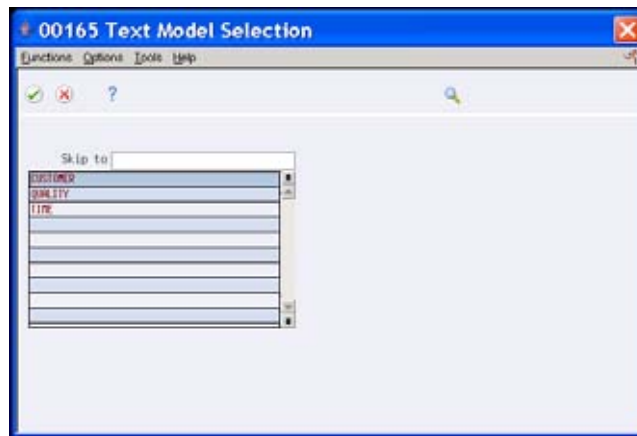
Complete the following tasks:

- Add a Model
- Copy a Model
- Delete a Model
- Select a Model

### To add a model

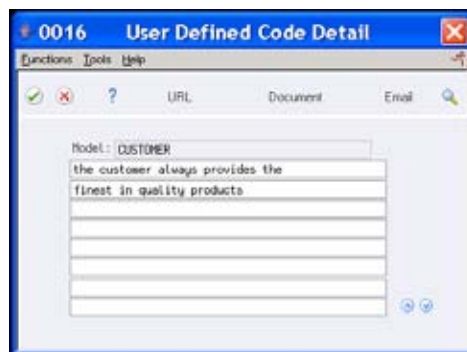
1. On User Defined Code Detail, choose Select Model Memo (F15) from the Functions menu.

The Text Model Selection window displays.



2. On a blank line, choose View/Change Model from the Options menu.

The User Defined Code Detail displays that you use to add the model.



3. Type the name of the model in the Model field. This is any name you want.

4. Type the associated text for the model on the lines below the Model field.
5. Click Enter and then click Exit (F3).
6. Exit (F3) the Text Model Selection screen and then choose Select Model Memo (F15) from the Functions menu to display the new model name.

### To copy a model

1. On User Defined Code Detail, choose Select Model Memo (F15) from the Functions menu.  
The Text Model Selection window displays.
2. Select the model you want to copy and choose View/Change Model from the Options menu.  
The User Defined Code Detail window displays with the model you selected.
3. Type a new name for the model in the Model field.
4. Change the associated text for the model on the lines below the Model field.
5. Click Enter and then click Exit (F3).
6. Exit (F3) the Text Model Selection screen and then choose Select Model Memo (F15) from the Functions menu to display the new model name.

### To delete a model

1. On User Defined Code Detail, choose Select Model Memo (F15) from the Functions menu.  
The Text Model Selection window displays.
2. Select the model you want to delete and choose View/Change Model from the Options menu.  
The User Defined Code Detail window displays with the model you selected.
3. Choose Delete this Entire Note from the Options menu.
4. Click Enter and then click Exit (F3).
5. Exit (F3) the Text Model Selection screen and then choose Select Model Memo (F15) from the Functions menu to ensure the model no longer exists.

### To select a model

1. On User Defined Code Detail, choose Select Model Memo (F15) from the Functions menu  
The Text Model Selection window displays.
2. Select the model you want and choose View/Change Model from the Options menu to display the information on the User Defined Code Detail screen.
3. Click Enter and then click Exit (F3).

## Translating UDCs

If your business is multi-national, you might want to translate the descriptions of your UDCs. The descriptions work in conjunction with the language specified for each person who uses the JD Edwards World system. For example, when someone who is set up as a French-speaking user accesses a User Defined Code with a French translation, the description appears in French.

The UDCs for languages are F0004D and F0005D.

### To translate UDCs

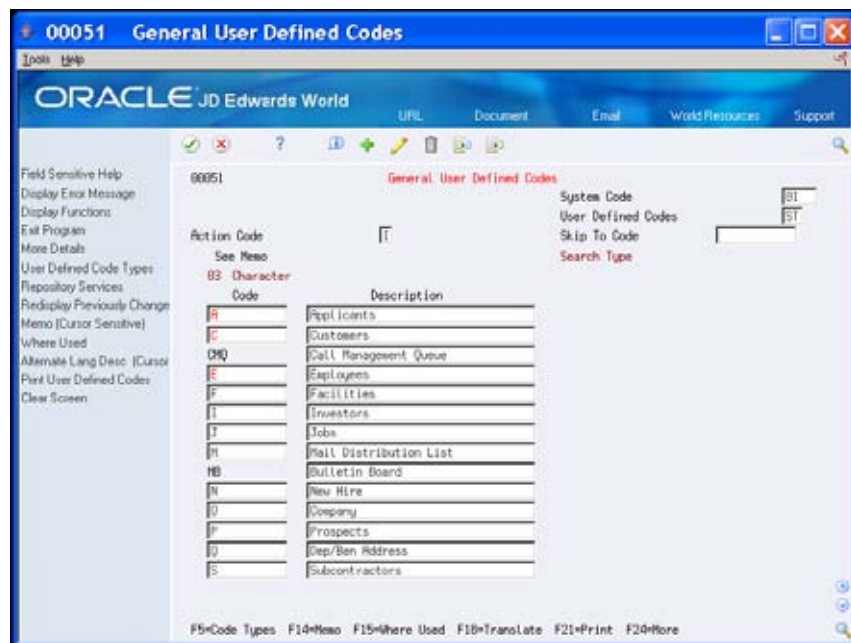
1. On General User Defined Codes, place the cursor on the appropriate field and choose Translate Description (F18).

The Translate User Defined Codes window displays.

Lang	Applicants Description
EN	Hireware
01	Substitution
P	Candidates
FN	Makijit
G	Bowarbor

2. Enter the language code and the description.

## Other Function Keys on the General UDCs Screen



### Repository Services

Repository Services (F6) accesses Data Dictionary, Menus, Vocabulary Overrides, and other Repository Service screens.

### Redisplay

Redisplay Previously Changed UDC Table (F9) to display a UDC table that was changed.

### Where Used

Where Used (F15) displays all data items that use the User Defined Code types you specify in the UDCs field

### Print

Print User Defined Codes (F21) to access a version of UDCs to print..

### Clear Screen

Clear Screen (F22) to clear the screen.

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## 8 DREAM Writer





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# Overview to DREAM Writer

## Objectives

- To understand how to locate DREAM Writer forms
- To understand working with DREAM Writer
- To understand how to format a report

## About DREAM Writer

DREAM stands for Data Record Extraction And Management.

DREAM Writer is an integral part of all JD Edwards World systems. With DREAM Writer, you can:

- Generate reports by address, person, and other categories
- Establish default data, form formats, and function for various interactive programs, such as Address Book Revisions
- Establish processing parameters for batch jobs and in many cases, update files. For example, annual closes, file purges, and postings

This section describes the following:

- Understand DREAM Writer
- Work with DREAM Writer
- Review version list options and functions
- Review possible errors and joblogs in DREAM Writer



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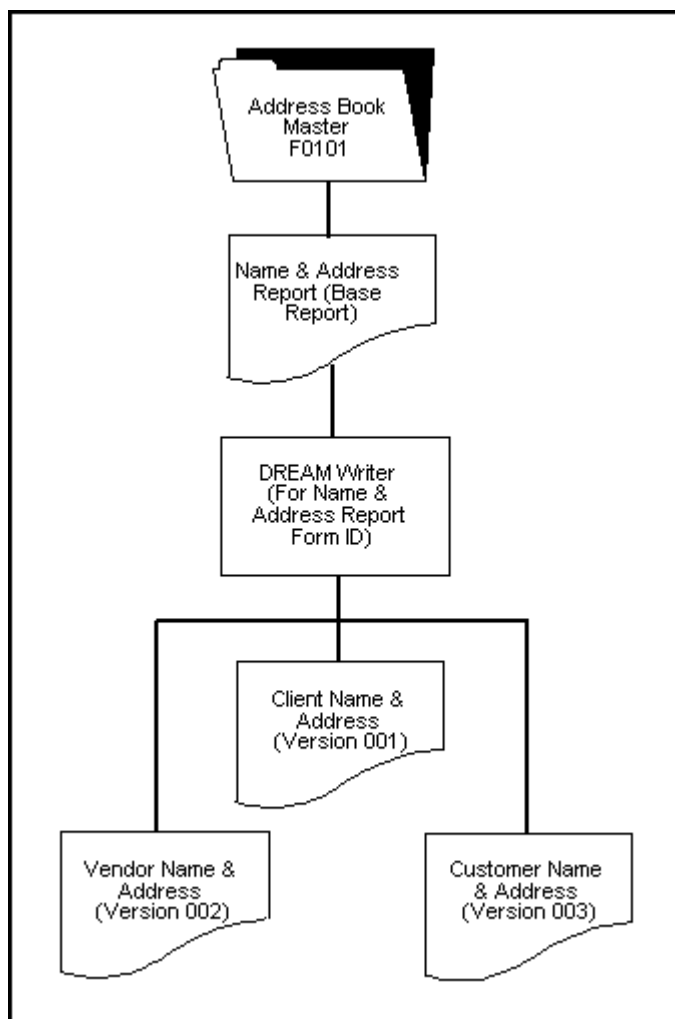
# Understand DREAM Writer

## Reviewing the DREAM Writer Flow

The following describes the DREAM Writer flow:

1. From a menu, select a report option.
2. From DREAM Writer, specify your report versions.
3. The system pulls information from a file as specified in DREAM Writer parameters.

For example, the Address Book Master (F0101) file provides data for the Reports by Address report.



## About DREAM Writer Formats

You define the format for a DREAM Writer report in a report template.

01421	J.D. Edwards & Company				Page -	3
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX				Date -	11/05/98
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX					
	XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX					
Address	Name	Phone	Line 2	Line 3	ST	
Number		Number				

- The Screen ID displays in the upper left corner
- The company name displays at the top, center with a default of 0000 Company
- User-defined titles, up to three lines, display below the company name
- The page number and date display in the upper right corner
- The columns of information display below the header information. You cannot add more columns of data or remove a column of data.

### What DREAM Writer Formats do You Control?

With DREAM Writer reports, you specify:

- The printing order of data. For example, displaying the data on the report in alphabetic order, beginning with A.
- Up to three lines of the title at the top of the report.
- Which records print on the report. For example, print only Colorado addresses.
- The printer parameters, such as paper size, printer type, etc., as long as your printer supports those options.

### What Are the DREAM Writer Processing Options?

DREAM Writer Processing Options for Reports:

- Control print and calculation functions
- Control which of multiple report formats print

### Where is DREAM Writer information Located?

- Definition, Parameters, and Processing Options (F98301)
- Processing Options — with a Language (F98302)
- Headings (Titles) — with a Language (F98303)
- Values and Ranges (F9831)
- Headings (Titles) (F98311)
- Printer File Overrides (F98312)

The JD Edwards World System Application Code for DREAM Writer is 81.

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# Work with DREAM Writer

Working with DREAM Writer includes the following:

- [Locating the DREAM Writer Versions List](#)
- [Reviewing the Five Steps of DREAM Writer](#)
- [Working with DREAM Writer Version Addition and Revision](#)
- [Working with DREAM Writer Version identification](#)
- [Entering DREAM Writer Additional Parameters](#)
- [Working with DREAM Writer Processing Options Revisions](#)
- [Working with DREAM Writer Data Selection](#)
- [Working with DREAM Writer Data Sequence Set-up](#)
- [Working with DREAM Writer Printer File Overrides](#)
- [Change the Date Format on DREAM Writer reports](#)

## Locating the DREAM Writer Versions List

You can use one of the following methods to locate the DREAM Writer Versions List.

- Locate Versions List using Method 1
- Locate Versions List using Method 2

JD Edwards World includes the following versions:

- ZJDE — These versions are defaults and are typically found as versions called from a menu.
- XJDE — These versions are examples. You can copy from these versions when creating your own versions. An upgrade replaces the XJDE versions.

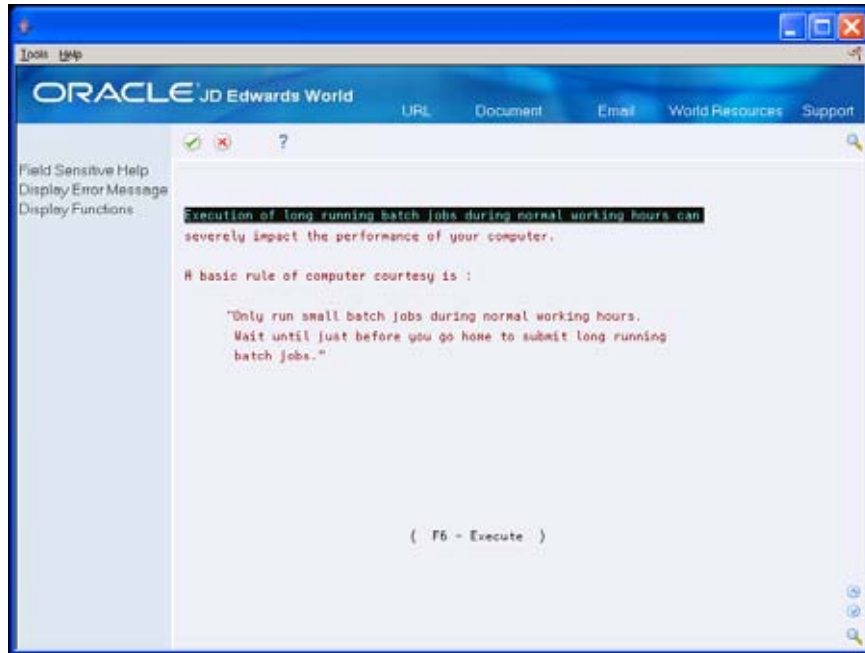
If you display a versions list from a menu, you cannot Skip To other form IDs.



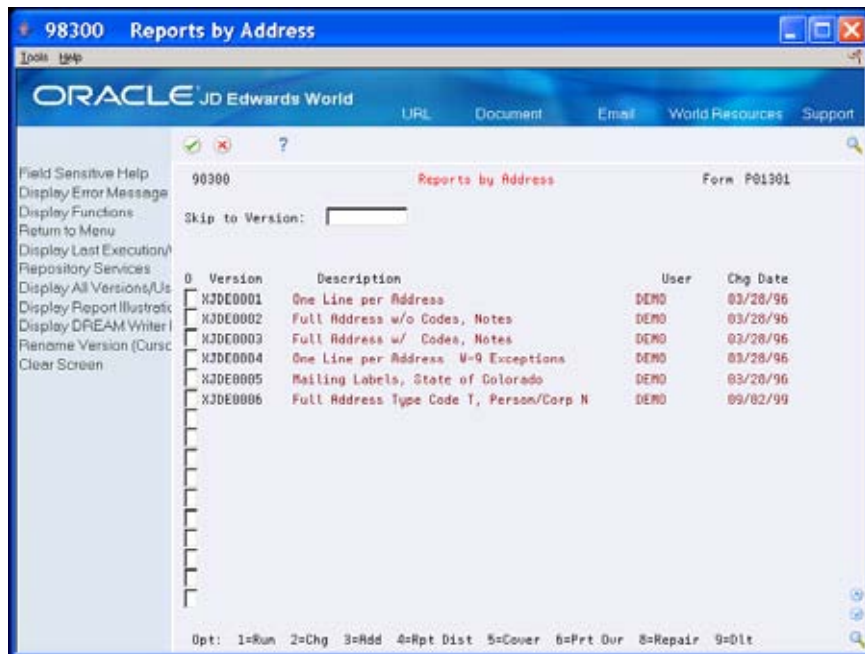
From Master Directory (G), choose **Address Book**  
From Address Book (G01), choose **Periodic Processing**  
From Periodic Processing (G0121), choose **Reports by Address**

### To locate Versions List using Method 1

Read the caution message and press F6.



To view a different report you must return to the Periodic Processes menu (G0121).



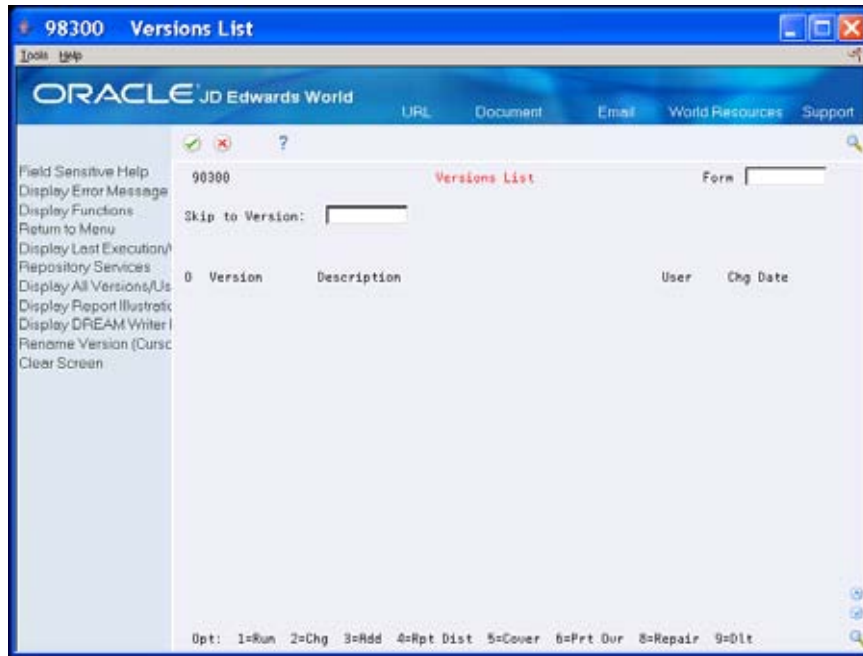
## To locate Versions List using Method 2



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **DREAM Writer**  
 From DREAM Writer (G81), choose **Versions List**

To restrict users from this option, use menu masking on the selection or the entire menu, or use custom menus.

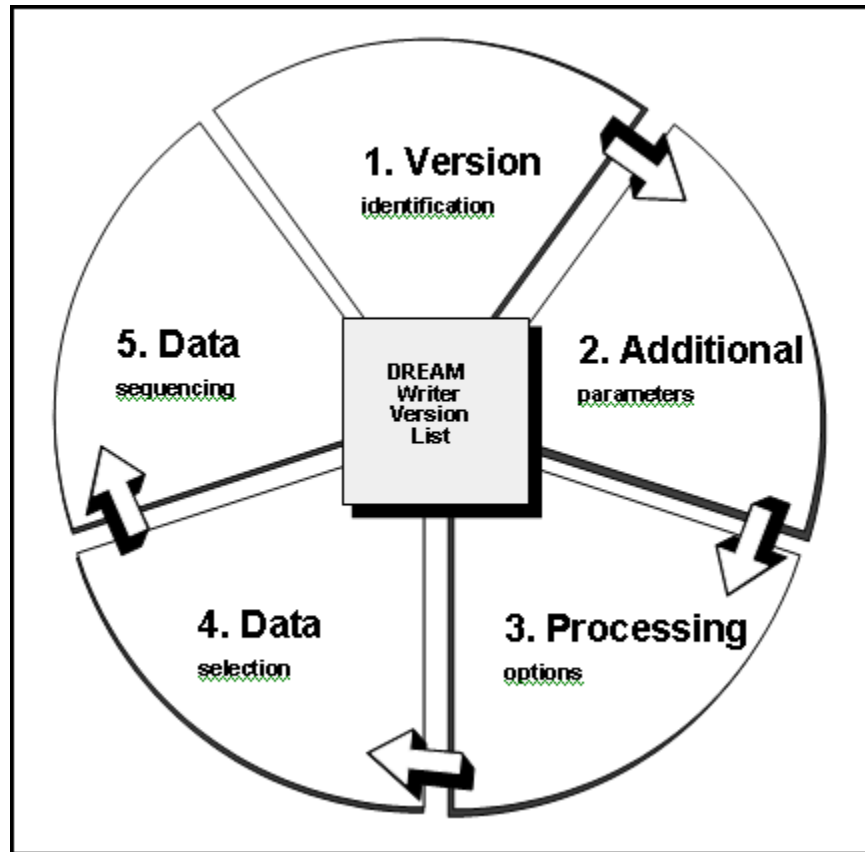
Enter a program name into the Form field.



Field	Explanation
Form	This form name is the name of the RPG program that controls the function format of this DREAM Writer report. For FASTR and P & E FASTR reports, the form name can normally be any name the users may create.
Version	Identifies a group of items that the system can process together, such as reports, business units, or subledgers. <i>Form-specific information</i> A specific set of parameters used to populate a DREAM Writer screen.
Description	A description of the version that appears next to the version number. The version title is different from the report title.
User	The IBM-defined user profile. <i>Form-specific information</i> The IBM-defined user profile of the last person to update that version.
Chg Date	The date of the last update to the file record.

## Reviewing the Five Steps of DREAM Writer

When you add a new report, you generally review five forms (steps).



When you change a version, the system displays a form from which you select the functions to which you want to make changes.

The functions you select determine what the system displays.

Function	Description
If you added or copied a version	The system displays the first DREAM Writer screen, the Version Identification screen, where you can start defining information for your version.
If you changed a version	The system displays a window in which it lists all DREAM writer function descriptions. You select the functions you want to display based on the information you want to change.

The DREAM Writer forms allow you to define or change information as follows:

Form	Description
1. Version Identification	You can display an internal description as well as up to three lines of report heading information.



Form	Description
2. Additional Parameters	You define parameters for the job, such as the based-on file, whether you want the cover page to print, and in which job queue you want to process the job.
3. Processing Options	Use processing options to control the type of report that the system prints. This information includes the format and print functions. Each screen ID has a unique set of processing options.
4. Data Selection	Data selection lets you select the information you want the system to print on the report. You can select records from any field in the based-on file. If you do not specify data, the system prints every record in the file on the report.
5. Data sequencing	Use data sequencing to specify how you want the system to sequence data, how the system totals the data, and how the system creates page breaks.

## Working with DREAM Writer Version Addition and Revision

Before walking through the DREAM Writer forms, there are two options called Revisions and Additions that give access to the five steps.

Complete the following tasks:

- Revise your own versions
- Add a version

### To revise your own versions

From (Versions List) Reports by Address

1. Enter 2 in the field to the left of the version you want to revise.  
The DREAM Writer menu displays.



2. Enter 1 in the field to the left of each screen you want to revise.  
Whichever functions you selected display in order.

## To add a version

To add a version, you need to copy a current version. Security may prevent you from copying certain versions.

From (Versions List) Reports by Address

1. Enter 3 in the option field of the version you want to copy.  
DREAM Writer Version Copy displays.



2. Do one of the following from DREAM Writer Version Copy:
  - If you designated a DREAM Writer user prefix in your JD Edwards World user preference, the new version displays the prefix followed by an asterisk (\*). Press Enter and the system assigns the next available version number.
  - If you designated a DREAM Writer version prefix at the system level in the QJDF data area, the new version displays this prefix followed by an asterisk (\*).

- If you did not assign a DREAM Writer user prefix in your JD Edwards World user profile or at the system level, a single asterisk (\*) displays. Press Enter and the system assigns the next available version number, with no prefix.
- If you want to assign a new prefix, type the prefix and an asterisk (\*). The system appends the next version number to your prefix.
- If you want to assign a version ID that does not contain any numbers or assign your own number, type the information desired and press Enter.

## Working with DREAM Writer Version identification

### To work with Version Identification

1. On Version Identification, specify a Version Title for the versions list. It is important to make these titles meaningful.

2. Specify up to three report titles for the hard-copy report.
3. If adding an alternative language record, identify a language by entering a user defined code. The system uses the language on screen displays and printed reports.

A total of four report headings can print:

- The first report heading is always the default company name
- Lines 2 through 4 are the DREAM Writer Optional Report titles

When you click Enter, the Additional Parameter screen displays. If you go too far, press F12 to return to the previous screen.

Field	Explanation
Language	<p>A user defined code (01/LP) that specifies a language to use when you display information or print reports. If you leave this field blank, the system uses the language you set up in your user profile. If there is no language in your user profile, the system uses the default, or base language, eg., English.</p> <p>Before any translations can appear, a language code must exist at either the system level or in your user profile. The language code at the system level or in your user profile must correspond to a language code assigned here to the version.</p> <p><i>Form-specific information</i></p> <p>A user defined code that specifies the language used for the title of this version. The allowed values are found in system 01, user defined code type LP.</p>
Version Title	<p>A description of the version that appears next to the version number, on the version list. The version title is different from the report title.</p>
Optional Report Title	<p>The title that appears at the top of the report. It can include up to three lines with 40 characters each. The lines are automatically centered on the report.</p>

## Entering DREAM Writer Additional Parameters

Additional Parameters contains job control parameters.

When creating a custom DREAM Writer you have greater flexibility using custom files and file record formats. DREAM Writer locates the file that you specify in the Based on File field and retrieves the file record formats on the Additional Parameters screen.

### To enter additional parameters

Click Enter from Version Identification to access the Additional Parameters screen.

If you go too far, press F12 to return to the previous screen.

The screenshot shows the '983011 Additional Parameters' window. At the top, it says 'ORACLE JD Edwards World'. Below that, there's a header with '983011 Additional Parameters', 'Form ID P01301', and 'Version/Histor 0001'. The main area contains several sections of parameters:

- Based on File:** F0101JC
- Based on Member:** \*ALL
- Processing Overrides:**
  - Print Cover Page (Y/N): Y
  - Mandatory Processing Option: Y
  - Job Queue: \*JOBQ
  - Format Name: F0101JC
  - Job to Execute: [blank]
  - Type Report Totalling: 1
- Open Query File Options:**
  - Optimize Option(1/2/3): 1
  - Sequential Only(Y/N): Y
  - Open for Output(Y/N): N
  - Open for Update(Y/N): N
  - Open for Delete(Y/N): N
- Print Instructions (Y/N):** N
- User Excl (0/1/2/3/4):** 0
- Hold on Job Queue (Y/N):** N
- Output Media:** RPT
- File Output Type:** 1
- Override Logical File:** [blank]

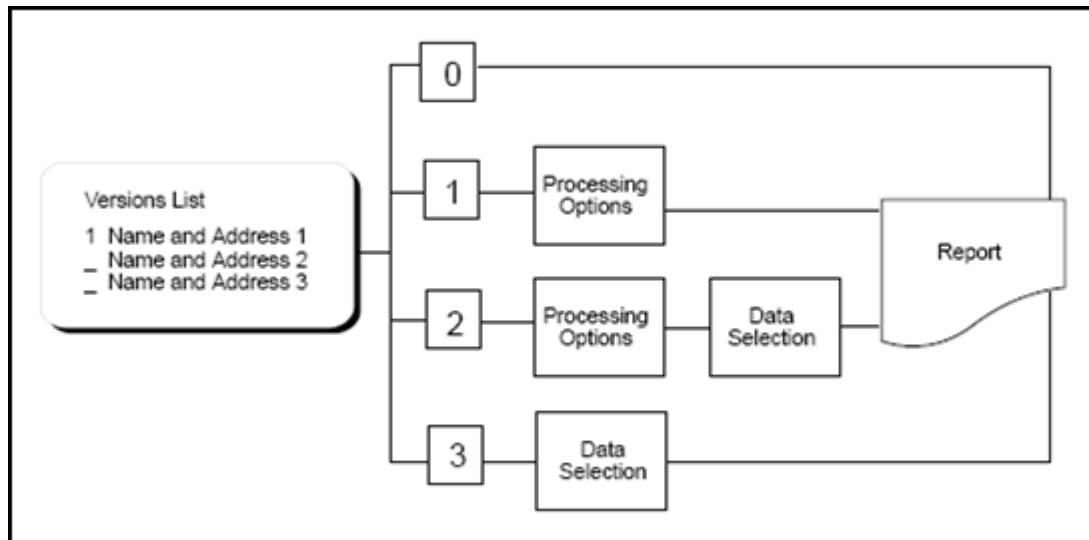
At the bottom, it says 'F6=Batch PC Export Parameters' and 'F24=More Keys'.

The system displays information about the fields. Once you press Enter, the Processing Options screen displays.

**Note:** Changing certain parameters on this screen can cause the report program to halt. Avoid changing Based on File, Based on Member, Format name, and any Open Query File Options without advice from JD Edwards World.

Field	Description
Based on File	Identifies the name of the physical file on which a logical file is based. In DREAM Writer, the based on file refers to the file on which all operations, such as Data Selection, Data Sequence, and so forth are to be done.  <i>Form-specific information</i> The file on which Data Selection and Data Sequence are done.
Based on Member	Specifies the name of a specific member of a physical or logical file. The standard default for all DREAM writer logicals is to be based upon all members of the physical file, member name = *ALL. You may also base the logical on a single member within the physical file by entering the name of the member in this field.

Field	Description
Print Cover Page (Y/N)	<p>A code that controls whether to print the cover page for the version.</p> <p>Y     Print cover page</p> <p>N     Do not print cover page</p> <p>For STAR reporting this code controls the printing of a separate specifications report.</p> <p><i>Form-specific information</i></p> <p>Note: You can use 1 for Y and 0 (zero) for N.</p>
Print Instructions (Y/N)	<p>Specifies whether to print the help instructions to accompany the requested report.</p> <p>Y     Print the help instructions</p> <p>N     Do not print the help instructions</p> <p>Note: You can use 1 for Y and 0 (zero) for N.</p>
Mandatory Processing Options	<p>A code used to designate whether a data item may optionally be selected by the user.</p> <p><i>Form-specific information</i></p> <p>A code to designate whether processing options or data selection appear before execution of the job. Values are:</p> <p>Y     Mandatory display of processing options screen at runtime.</p> <p>2     Displays both Processing Option and Data Selection forms at runtime.</p> <p>3     Mandatory displays Data Selection screen at runtime.</p> <p>N     Immediate submission to batch.</p> <p>Note: You can use 1 for Y and 0 (zero) for N.</p>



Field	Explanation
User Exclusive (0/1/2/3/4)	<p>This field allows you to restrict user access for a report version.</p> <p>Values are:</p> <p>0 No security. Anyone can change, copy, delete, and run the version. This is the default when adding a new version.</p> <p>1 Medium security. Only the user who created the version can change and delete it. All users can copy and run the version. This is how the JD Edwards World Demo versions are delivered.</p> <p>2 Medium to full security. Only the user who created the version can change, delete, and run it. All users can copy the version.</p> <p>3 Full security. Only the user who created the version can change, delete, copy, and run it.</p> <p>4 Medium security-extended. Only the "Last Modified By" user can design, change processing option values (including runtime processing options and data selection), change detail values, check in, check out, or delete the version. Anyone can install, copy, transfer, or run the version.</p>
Job Queue	The computer waiting line that a particular job passes through. If blank, it defaults to the job queue specified in the user's job description.
Hold on Job Queue (Y/N)	<p>A code used to indicate whether to hold the submitted job in the job queue. Values are:</p> <p>Y Yes</p> <p>N No</p>
Format Name	The RPG format name the system uses in the logical file or open query statement.

Field	Explanation
Output Media	Output values are specified as follows: RPT Reports, including special forms IFX Output to FAX distribution (future use).
Job to Execute	If specified, this job will be executed instead of the normal form ID.
File Output Type	The DREAM Writer File Type field specifies which type of file will be produced by the DREAM Writer. Valid values are: <ol style="list-style-type: none"><li>1 Open Query File (default value)</li><li>2 Standard Logical File. DREAM Writer creates this file, and then deletes it when processing is complete.</li><li>3 Future Use</li><li>4 Standard Logical file (Create &amp; Keep)</li></ol>
Type Report Totaling	This code defines the type of totaling to be used by DREAM Writer for this report version. The values are: <ol style="list-style-type: none"><li>1 Hard coded program totaling; you cannot specify any subtotaling;</li><li>2 Hierarchical totaling that can be specified in the data sequencing screen is supported by the application.</li></ol>
Override Logical File	The name of an existing logical file that the DREAM Writer uses when processing a version in place of a dynamically created logical view. You can also specify the version logical file that is created dynamically. Use when File Output type is 4.
Optimize Option (1/2/3)	The OPNQRYF Optimize Option specifies which option should be used for return of records from a DREAM Writer or FASTR open query file. The options are: <ol style="list-style-type: none"><li>1 *ALLIO. To improve the total time to read the whole query. This assumes that all query records are read from the file.</li><li>2 *FIRSTIO. To improve the time it takes to open the query file and get the first batch of records.</li><li>3 *MINWAIT. To improve the response time for reading records from this file.</li></ol> JD Edwards World recommends that you do not change this field.



Field	Explanation
Sequential Only (Y/N)	<p>This field is used in conjunction with the OPNQRYF function. This field specifies the use of sequential only Yes or No when opening the file. The use of sequential only Yes provides fastest processing of the file but does not allow random access or read prior options in the file. The use of sequential only No processes the file slightly slower but does allow random access and read prior options in the file.</p> <p>This option should not be changed; follow the examples on the DREAM Writer or FASTR versions provided with a User Id of DEMO.</p>
Open for Output (Y/N)	<p>This field is used in conjunction with the OPNQRYF function. It means that the program in this procedure writes new records to the Base File during processing.</p> <p>This option should not be changed; follow the examples on the DREAM Writer versions provided with a User Id of DEMO.</p>
Open for Update (Y/N)	<p>This field is used in conjunction with the OPNQRYF function. It means that the program in this procedure will update existing records in the Base File during processing.</p> <p>This option should not be changed; follow the examples on the DREAM Writer versions provided with a User Id of DEMO.</p>
Open for Delete (Y/N)	<p>This field is used in conjunction with the OPNQRYF function. It means that the program in this procedure will delete (remove) existing records from the Base File during processing.</p> <p>This option should not be changed; follow the examples on the DREAM Writer versions provided with a User Id of DEMO.</p>

## Working with DREAM Writer Processing Options Revisions

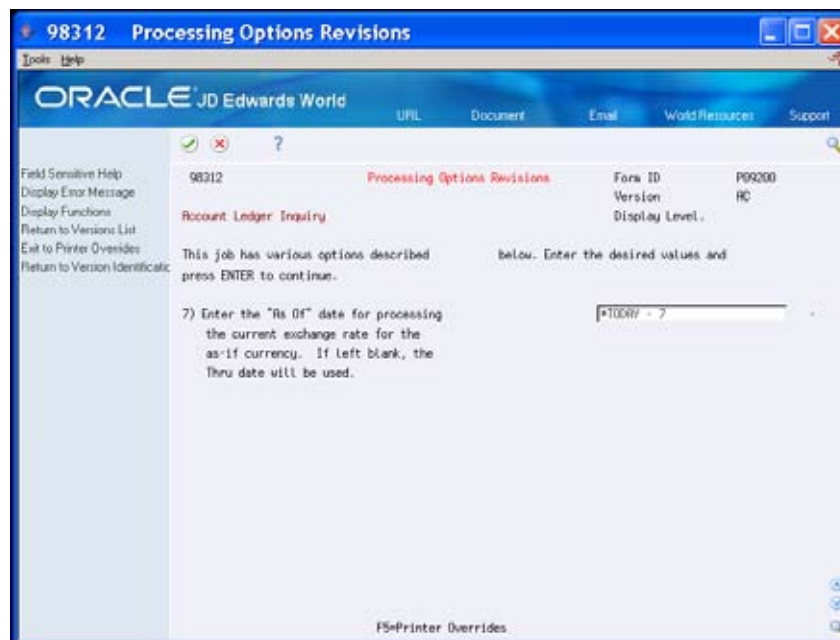
Processing Options Revisions can control the type of report that prints.

- Select report format
  - Decide which pre-defined template to print
  - Print summary or detail information
  - Print labels or lists
- Control other options
  - Page breaks
  - Totaling and other special calculations
  - Dates
  - Document Types

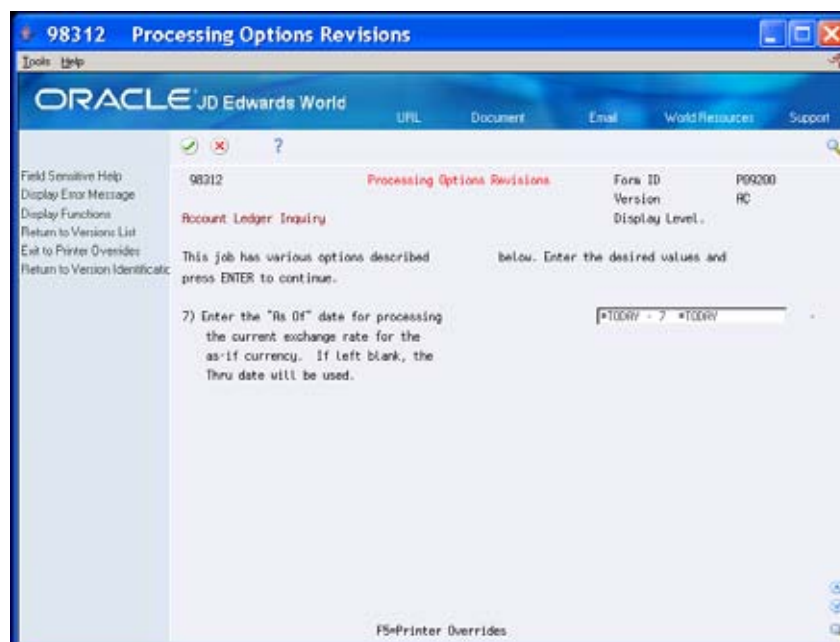
You can use \*TODAY with Processing Options date selection. \*TODAY with + (plus) or - (minus) will retrieve records with previous or future dates. You can only use + or - for a number of days.

Ranges or a list of values are not valid on a single selection value line.

The following illustrates an acceptable entry:



The following illustrates an unacceptable entry:



Each program has a unique set of Processing Options. A few programs contain no processing options.

## To work with Processing Options Revisions

Click Enter from Additional Parameters to access the Processing Options Revisions screen. If you go too far, press F12 to return to the previous screen.

98312 Processing Options Revisions

ORACLE JD Edwards World

Field Sensitive Help  
Display Error Message  
Display Functions  
Return to Versions List  
Exit to Printer Overrides  
Return to Version Identif

98312 Processing Options Revisions Form ID P01301  
Version 0001  
Display Level.

One Line per Address

This job has various options described below. Enter the desired values and press ENTER to continue.

ADDRESS BOOK REPORTS W/OUT WHO'S WHO

1. Select the format you wish to print.

1 - Mailing Labels  
1A - Mailing Labels/Bulk  
(Address Format 04 Only)  
2 - One Line per Address  
3 - Full Address w/o Codes and Notes  
4 - Full Address w/ Codes and Notes  
9 - Mailing Labels w/Address number  
and Phone number  
9A - Mailing Labels w/Address number  
9B - Mailing Labels w/Phone number

Note: When running Form 3 the based on file must be the F0101JB. All other forms must be based on the F0101JC.

F5=Printer Overrides

1. Type one of the report format templates numbers into the blank field on the right.
2. Page down to the next Processing Options Revisions screen.

98312 Processing Options Revisions

ORACLE JD Edwards World

Field Sensitive Help  
Display Error Message  
Display Functions  
Return to Versions List  
Exit to Printer Overrides  
Return to Version Identif

98312 Processing Options Revisions Form ID P01301  
Version 0001  
Display Level.

One Line per Address

This job has various options described below. Enter the desired values and press ENTER to continue.

PAGE BREAK:

2. Enter 1 to skip to a new page when the first alpha character changes. Default of blank will not page break.

GENERIC TEXT:

3. Enter a '1' to print the Address Book Generic Text in a 40 character width, a '2' to print text in an 80 character width. If left blank, Generic Text will not be printed.

F5=Printer Overrides

3. Type your selections into the blank fields on the right.

4. Page down to the next Processing Options Revisions screen.

5. Type your selections into the blank fields on the right.
6. Page down to the next Processing Options Revisions screen.  
The last Processing Options Revisions screen displays.
7. Type your selection into the blank field on the right.
8. Click Enter.

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**Note:** You can have Processing Options Revisions display every time you execute the report. Set this option up on the Additional Parameters screen in the Mandatory Processing Option field:

Y or 1 — Displays Processing Options Revisions when report is run  
 2 — Displays both Processing Options Revisions and Data Selection whenever the report is run

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Field	Explanation
Form ID	The RPG report program name that defines the report template.
Version	Identifies a group of items that the system can process together, such as reports, business units, or subledgers.
Display Level	The Level of Display field contains a number or letter identifying the level at which menus and processing options are displayed. The levels of display are found in UDC table 00/LD.

## What You Should Know About

Processing Options	Description
<b>Adding Processing Options</b>	The @OP array table allows you to enter up to 99 processing options.
<b>Adding Custom Processing Options</b>	When you create a custom Dream Writer, you can add custom processing options. Additionally, you can attach a UDC table to a processing option. If you create the UDC table and attach it to the data item in Data Dictionary but the default glossary, not the UDC table displays when you press F1 on the processing option you must verify the field name. To do so, enter the data item ensuring it is <i>right justified</i> in the Field Name field. Leave the first two spaces blank to specify the file prefix.

## Working with DREAM Writer Data Selection

Data Selection gives you the ability to select the information you want printed on a report. Select records from any field from the Based-On File. If you do not select any criteria, the report prints every record.

The following are examples of customers in the Address Book Master (F0101). The customers display by alpha name, search type, and location.

### Address Book Master (F0101)

Alpha Name	Search Type	Location or Branch
A&D Parts Co.	V	DEN
Dunlop Const.	C	NYC
Eason, Walter	E	DEN
EverReady	V	NYC
Goldwater's	C	DAL
MCI	V	DEN
Office Warehouse	V	DEN
Olson Payroll	C	DEN
Xavier Mrktg.	V	SFO

Examples	Alpha Name	Search Type	Location or Branch
Report of all customers Search Type = C	Dunlop Const.	C	NYC
	Goldwater's	C	DAL
	Olson Payroll	C	DEN
All addresses associated with the New York branch Location or Branch = NYC	Dunlop Const.	C	NYC
	EverReady	V	NYC
All customers associated with the New York branch Search Type = C Location or Branch = NYC	Dunlop Const	C	NYC

## To work with Data Selection

Click Enter from Processing Options Revisions to access the Data Selection screen. If you go too far, press F12 to return to the previous screen.

98302 Data Selection

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Return to Versions List  
More information  
Update with Redisplay  
Return to Previous Pane  
Display All Data Fields

98302 Data Selection Form ID P01301  
Version 0001

One Line per Address

I	Explanation	Rel.	Selection	Value
N				
Y	Category Code 01 . . . . .	EQ	ALL	
Y	User ID . . . . .	EQ	ALL	

F4=Extra Data F5=Updt u/Redisplay F16=Display All Data Fields

1. Enter Y in the field to the left of the selection that you want.

2. If necessary, enter a relationship in the Selection Rel field.

Field	Explanation
Selection Rel	A code that indicates the relationship between the range of variances that you display. Valid codes are:
EQ	Equal to
LT	Less than
LE	Less than or equal to
GT	Greater than
GE	Greater than or equal to
NE	Not equal to
NL	Not less than
NG	Not greater than
CT	Contains (only allowed in selection for Open Query File function)
CU	Same as "CT" but converts all input data to upper case letters
	<i>Form-specific information</i>
	For Configuration Management, you cannot use codes CT and CU.
	The NE operand must appear first in the selection criteria if you are using NE with the *RANGE or *VALUE parameters and File Output Type is a standard logical file.

The Selection Rel field uses Boolean logic. In conjunction with the data you enter in the Selection Value field, these two fields let you select the specific records to print on your report.

If you enter NE in the Selection Rel field:

- It must be first in your selection list if the Selection Value is \*VALUES or \*RANGE
- It should be first in your selection list unless you are using OPNQRYF

3. If necessary, enter a value in the Selection Value field.

Use the Selection Value field with the Boolean logic of the Selection Rel field. These two fields select the data you want to print on your report. The following list describes the possible values that you enter into the Selection Value field:

- Specific Value selects a record by a specific value. For example, the value could be NYC for New York City. Click Help (F1) from the Selection Value field to see the User Defined Codes screen of valid values.
- \*ALL selects all the records for that field. This is the default.
- \*ZERO or \*ZEROES selects null values. For example, used with a relationship of EQ, it would retrieve all records for that field that equal zero.
- \*BLANKS selects blank values. For example, used with a relationship of EQ (equal to), it would retrieve all records for that field that are blank.

- \*TODAY selects all records for that field that have the current day as their dates. The system date is used.
- \*TODAY blank to 9999 selects records based on a run-time calculation of a date by adding or subtracting a number from the current date.
- \*YEAR, \*MONTH, \*DAY uses the current system value.
- \*RANGE Displays another screen, once you have pressed Enter, from which you can select a single inclusive range of values:

The diagram illustrates the \*RANGE screen flow. The top screen shows a field 'Postal Code' followed by 'EQ' and a 'Value' field containing '\*RANGE'. An arrow points down to a second screen titled 'Example of \*RANGE'. This screen shows 'Ranges for: Postal Code' with two values, '80237' and '80245', indicating a range selection.

- Prompts you with the from and through set of values.
- Only use with the EQ and NE relationships.
- \*VALUE or \*VALUES displays another screen, once you've pressed Enter, from which you can select up to 45 individual values. Only use with the EQ and NE relationships.

The diagram illustrates the \*VALUE screen flow. The top screen shows a field 'Location or Branch' followed by 'EQ' and a 'Value' field containing '\*VALUE'. An arrow points down to a second screen titled 'Example of \*VALUE'. This screen shows 'Location or Branch' with two values, 'DEN' and 'NYC', indicating individual value selection.

- \*WILDCARD uses a "wildcard" search string:
    - Only use with the Open Query File.
    - An asterisk (\*) represents one or more character.
    - An underscore (\_) represents one character.
    - Place the search string in the second input field.
4. Choose Update with Redisplay (F5) to update the Data Selection and re-display the screen.
  5. Click Enter when you have finished. When using \*VALUE or \*RANGE, after you press Enter the Values for or Ranges for screen displays.
- Help (F1) will not work from either the \*VALUE or \*RANGE forms.



ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions

Values for : Category Code 01


6. Enter the values or range.
7. From Data Selection, choose More Information (F4) to display additional fields.

98302 Data Selection

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Return to Versions List  
More Information  
Update with Redisplay  
Return to Previous Panel  
Display All Data Fields

98302 Data Selection Form ID: P01801  
Version: XJDE0005

Full Address Type Code T, Person/Corp N

I	Explanation	Seq	And/Or	R Name	Optional	Rel.	Value
Y	Category Code 01	029	And/Or	ABRO01	Optional	EQ	*ALL
Y	Business Unit	095	And/Or	ABRO01	Optional	EQ	*ALL
Y	Person/Corporation Code	107	And/Or	ABRO01	Optional	EQ	*ALL
Y	Type Code	193	And/Or	WTYC	Optional	EQ	*ALL

F4=Extra Data F5=Update/Redisplay F18=Display All Data Fields

Field	Explanation
Sequence	<p>This number is used to control the sequence of Processing Options, DDS Selection values and DDS Key sequences.</p> <p>The sequence number is relative, meaning that the sequence need not start 001, 002, etc. A sequence of 003 and 005 sorts the report with the 003 field before the 005 field.</p> <p>For Financial Reports, company MUST be sequence 001 in order to access the specific company Automatic Accounting Instruction (AAI) records. If company is not sequence 001, company 00000 AAIs are used.</p>
And/Or	<p>A code that determines whether compound data selection logic is based on an A = AND condition or an O = OR condition.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>For valid codes for DREAM Writer Data Selection are:</p> <p>A    And</p> <p>O    Or</p>
Optional	<p>Designates a code that indicates whether a user can select a data item.</p> <p style="text-align: center;"><i>Form-specific information</i></p> <p>On both the DREAM Writer Data Selection and the Data Sequencing screens, this field is used to control whether the data item can be accessed from the data selection or sequencing screen.</p> <p>The values are as follows:</p> <p>Y    Yes, the data item can be accessed.</p> <p>N    No, access is not permitted.</p>
Allow *ALL	<p>This code is used to indicate to the DDS Generator whether or not a value of *ALL is allowed for this selection.</p>

---

**Note:** Display all Data Fields (F16) displays all Data Fields in the Base On File from which you can make selections. Specify fields you want the system to suppress when a user chooses Display all Data Fields (F16). Use User Defined Code Type FS for System Code 81.

---

## What is AND / OR Logic?

The following shows first an example of AND logic, followed by an example of OR logic.

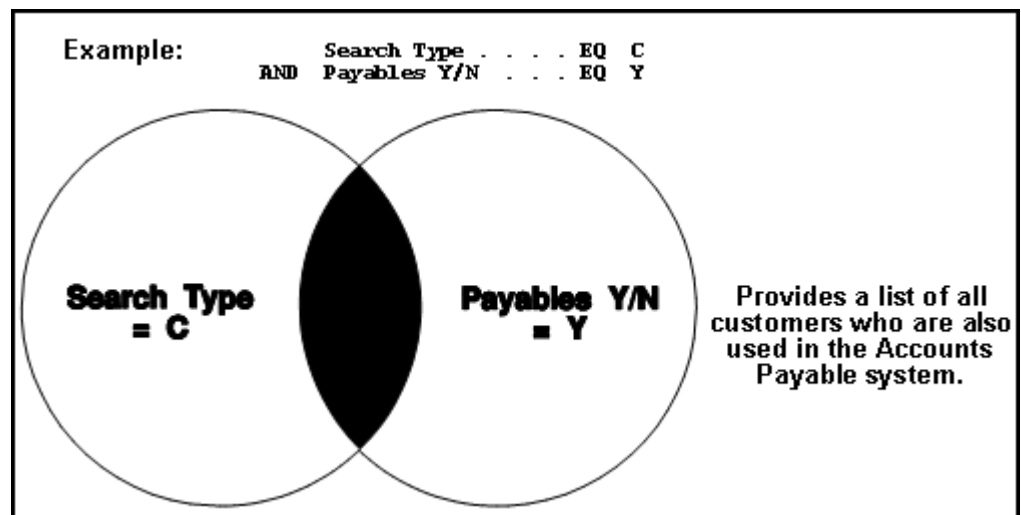
For both examples, the list of customers displays as they might appear in the Address Book Master (F0101). The customers are displayed by alpha name, search type, and payables:

## Address Book Master (F0101)

Alpha Name	Search Type	Payables (Y/N)
A&D Parts Co.	V	Y
Dunlop Const.	C	Y
Eason, Walter	E	N
EverReady	V	Y
Goldwater's	C	N
MCI	V	Y
Office Warehouse	V	Y
Olson Payroll	C	Y
Xavier Mrktg.	V	Y

## Example: AND Logic Example

AND Logic includes only the data that the two, or more, fields have in common as indicated by the shaded area.



In the example, you select Search Type EQ (equal to) C AND Payables Y/N EQ (equal to) Y.

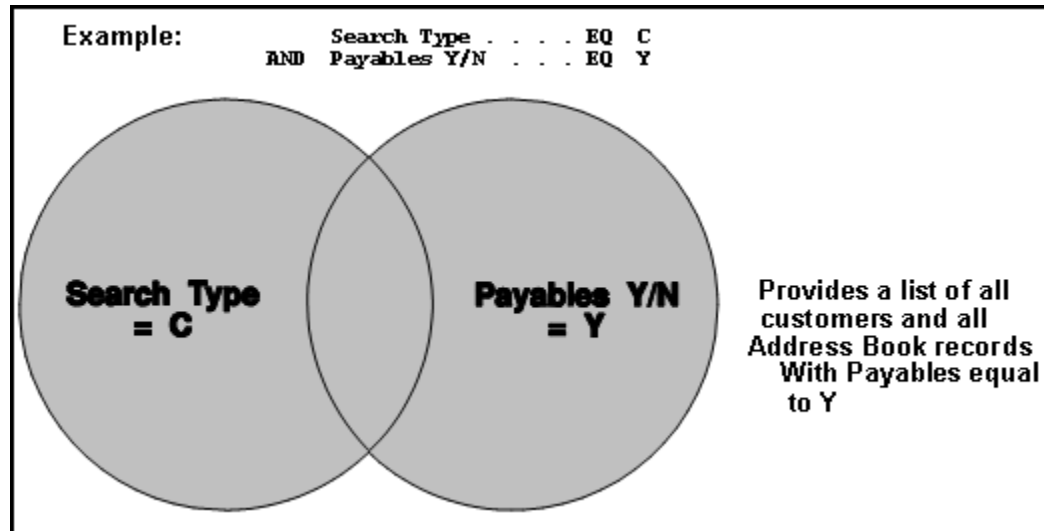
Report all customers with Search Type = C AND Payables Y/N = Y:

Alpha Name	Search Type	Payables (Y/N)
Dunlop Const.	C	Y

Alpha Name	Search Type	Payables (Y/N)
Olson Payroll	C	Y

### Example: OR Logic

OR Logic includes all data of both fields as indicated by the shaded areas.



In the example, the user selects Search Type EQ (equal to) C OR Payables Y/N EQ (equal to) Y.

Report all customers with Search Type = C OR Payables Y/N = Y:

Alpha Name	Search Type	Payables (Y/N)
A&D Parts Co.	V	Y
Dunlop Const.	C	Y
EverReady	V	Y
Goldwater's	C	N
MCI	V	Y
Office Warehouse	V	Y
Olson Payroll	C	Y

## Working with DREAM Writer Data Sequence Set-up

Data sequencing determines the order in which selected records display on the report.

In the following example, the system will list the report lines in alphabetic order by name.

If there are two lines with the same name, the lines are then listed in numeric order according to the address number.

## To work with Data Sequence Set-up

1. On Data Selection, press Enter to access the Data Sequence Set-up screen. If you go too far, press F12 to return to the previous screen.

Description	Seq
Alpha Name . . . . .	001
Address Number . . . . .	002

2. Change the sequence numbers to change how the system lists the report lines, but always check program helps to see if you can change sequencing. For example, the Help instructions from Job Billing Health & Welfare program are very explicit about not changing the sequence.
  - Changing sequencing can be dangerous to some reports.
  - Some reports have built in sequence assumptions called level breaks.
  - If you change sequencing, your results could be unpredictable. This is especially true when running batch jobs that update files.
3. Choose Display all data fields (F16) to display all Based-On File fields available for sequencing.
4. Choose More Details (F4), to display additional fields.

98303 Data Sequence Set-up

Form ID: P01301  
Version: 0001

One Line per Address

Description	Seq
Alpha Name	001
Address Number	002

Opt: Y Asc/Desc: A Name: ADDRPH

If you change the Type Report Totaling field in Additional Parameters to a value of 2, the system displays two additional columns on the Data Sequence Set-up screen.

98303 Data Sequence Set-up

Form ID: P01301  
Version: 0001

One Line per Address

Description	Seq	Total	Page
Alpha Name	001		N
Address Number	002		N

Opt: Y Asc/Desc: A Name: ADDRPH

Field	Explanation
Seq	<p>This number is used to control the sequence of Processing Options, DDS Selection values and DDS Key sequences.</p> <p>The sequence number is relative, meaning that the sequence need not start 001, 002, etc. A sequence of 003 and 005 will sort the report with the 003 field before the 005 field.</p> <p>For Financial Reports, company MUST be sequence 001 in order to access the specific company Automatic Accounting Instruction (AAI) records. If company is not sequence 001, company 00000 AAIs are used.</p>
Description	<p>Creates the title on text and reports. It is used in a manner similar to the column description in the query facility. It should be less than 35 characters. Use abbreviations whenever possible. For example:</p> <p>U/M Units of measure  YTD Year-to-date  MTD Month-to-date  PYE Prior year end  QTY Quantity  G/L General ledger  A/P Accounts payable  DEPR Depreciation</p>
Opt	<p>Designates a code that indicates whether a user can select a data item.</p> <p><i>Form-specific information</i></p> <p>On both the DREAM Writer Data Selection and the Data Sequencing screens, this field is used to control whether the data item can be accessed from the data selection or sequencing screen.</p> <p>The values are as follows:</p> <p>Y Yes, the data item can be accessed.  N No, access is not permitted.</p>
Asc/Desc	<p>A code to designate sorting sequence as ascending or descending. The following codes apply:</p> <p>A Ascending  D Descending</p> <p>Note: For use within OPNQRYF command to designate the UNIQUEKEY parameter. The number of key sequence fields specified with the following codes represent the number assigned to the UNIQUEKEY parameter. This parameter eliminates duplicate records for the specified keys.</p> <p>U Ascending  V Descending</p>

Field	Explanation
Name	The name of the field within the file. This name is constructed using the File Prefix specified in the SVR and the data item name in the data dictionary.
Total Level	<p>A level break, not to be confused with Account Master or Business Unit Master level of detail concept (see LDA and LDM respectively). You may specify the level of totaling that you wish to place on this field. Up to 9 levels of totals are permissible. If levels of totals are not specified in an order consistent with the sequence parameters, unpredictable results will occur.</p> <p>For example :</p> <ul style="list-style-type: none"><li>Level 01 - Department Totals - Sort Sequence 03</li><li>Level 02 - Branch Totals - Sort Sequence 02</li><li>Level 03 - Division Totals - Sort Sequence 01</li><li>Level 10 - Grand Totals</li></ul> <p>If you specify the same totaling level on more than one data field, you must enter a 1 in the 1st position of total level for all secondary fields.</p> <p>For example :</p> <ul style="list-style-type: none"><li>Level 01 - Business Unit (description comes from here)</li><li>Level 11 - Object (description ignored)</li><li>Level 11 - Subsidiary (description ignored)</li></ul>
Page Skip	<p>Valid codes are:</p> <p>Y     Indicates that a new page should be started when the value of this field changes.</p> <p>S     Indicates printing summarized information on this field level.</p> <p>When summarization is indicated, you must also enter the level of totaling (refer to the glossary for field "LTOT"). Summarization should only be specified at the lowest detail totaling level (total level = 01).</p>

## What You Should Know About

Field Values	Description
Using CT or CU	When using CT or CU in the Selection Rel field, you must specify a specific value in the Selection Value field. You cannot insert any of the special parameters, such as *VALUES. To search for multiple values using CT or CU, enter OR statements in the data selection. You can only use the CT values in an Open Query File function.



Field Values	Description
<b>Using * TODAY</b>	<p>You can use *TODAY in the Data Selection in any date field that is in the based-on file. Using *TODAY with + (plus) or - (minus) retrieves records with previous or future dates. You can only use + or - for a number of days. For example:</p> <ul style="list-style-type: none"><li>▪ *TODAY - 1: selects records where the date field is equal to yesterday's date.</li><li>▪ *TODAY through *TODAY + 7: use with *RANGE to select any record where the date field contains a value equal to today's date through a week from today.</li><li>▪ 12/31/15 *TODAY 01/01/16 *TODAY + 100: when using *VALUE, you can use a combination of date values and *TODAY values. In this example, the system selects records where the date field is equal to 12/31/2015, 01/01/2016, today's date, and today's date + 100 days.</li></ul>

Field Values	Description
Using *WILDCARD	<p>Consider the following when using *WILDCARD:</p> <ul style="list-style-type: none"><li>▪ Only use with the Open Query File (OPNQRYF) on alphanumeric data fields.</li><li>▪ On the Data Selection screen, you enter *WILDCARD in the Selection Value field on the line with a value in the Explanation field. A screen containing two fields displays for you to enter the search string.</li><li>▪ In the first field you enter the search string. For example, *LW5511* to find Alpha Names that include those characters. The default wildcard characters are the _ underline, which you use to denote only one character and the * asterisk which you use to denote one or more characters. The value in this field is similar to the CT value in the Selection Rel field, except you must specify multiple strings for the search rather than only one.</li><li>▪ In the second field you the change the default wildcard characters by entering two characters. The first character handles the single character search, representing one single position of any valid character. The second character handles multiple character searches, representing any number of positions of any valid characters. If you leave this field blank, the system enters the default _ or * character. You do not need to change the characters from the default unless your search string includes them. For example, you want to find all descriptions containing JD Edwards World. The string in each description can have variations of JD Edwards World World or JD Edwards World World. In order to find all of these variations, your wild card value is *J*D*Edwards* (assuming you use the default characters). The system interprets the string as any number of leading characters followed by J, followed by any number of characters, followed by D, followed by any number of characters, followed by Edwards, which is also followed by any number of characters. If you change the value to _J*D*Edwards*, the search is the same except the string can contain only one leading character, as denoted by the _ in front of the J.</li><li>▪ Use an override set of wild card characters, such as % for single character searches and @ for multiple character searches when the string contains one of the default characters. The meaning of each character does not change; it allows you to scan for the strings containing either the _ or the * characters. For example, to search for a string that begins with an * and has Edwards following the *, use *@Edwards@. The system interprets this as the first character is an *, followed by any number of characters, followed by Edwards, followed by any number of characters. The results might include alpha names such as *JD Edwards World or *A.G. Edwards or *Jim Edwards Smith.</li></ul>

## Working with DREAM Writer Printer File Overrides

The Printer File Overrides screen controls where and how the report prints. Other Printer File Overrides are set based upon your printer.

Two ways to locate Printer File Overrides:

- Exit to Printer Overrides (F5) from Processing Options
- Option 6 from the DREAM Writer Versions List

If you set the Print Queue field to \*JOB, the system defaults to the printer based on your user ID.

Field	Explanation
Form ID	The RPG report program name that defines the report template.
Version	Identifies a group of items that the system can process together, such as reports, business units, or subledgers.
Processing Option Text	The title that appears at the top of the report. It can include up to three lines with 40 characters each. The lines are automatically centered on the report.
Print Queue	A designation of a specific print queue (e.g. QPRINT). If left blank, it defaults to the Print Queue specified in your user profile

Field	Explanation
Hld in Prt Queue (Y/N)	<p>This flag is used to determine whether to hold the print file in the print queue rather than printing it.</p> <p>Valid values are:</p> <p>Y     hold on the print queue</p> <p>N     do not hold on the print queue</p> <p>S     same as Y but print file will be saved on the print queue</p> <p>T     same as N but print file will be saved on the print queue</p> <p>Note: You can use 1 for Y and 0 (zero) for N.</p> <p>UPGRADE PLANNER: If you are entering information into your Upgrade Plan, the following values are valid:</p> <p>1     hold on print queue</p> <p>0     do not hold on the print queue</p>
Number of Report Copies	The number of copies of this report to be printed. One copy is the default.
Save Spool File	Indicates whether the spool file should be set to a SAV status after printing.
Char./Inch (10/15)	The horizontal printing density. This should be entered as the number of characters per inch and must be supported by your printer.
Form Type	A field used in the definition of a report version used to indicate the special forms number to be used in the printing of a particular report.
Lines/Inch (4/6/8/9)	<p>The line spacing should be entered as the number of lines per inch and must be supported by your printer. The valid values are:</p> <p>4     IBM 5219, 5224, 5225, and 3287 printers only</p> <p>6     IBM 5224 printer only</p> <p>8     IBM 5224 printer only</p> <p>9     IBM 5225 printer only</p> <p>The standard computer print is 6 LPI and 10 CPI. If you are printing on 8 1/2" x 11" paper, you would specify 8 LPI and 15 CPI.</p>
Location of Page Overflow	A field used in the definition of a report version to indicate the number of lines to be printed on a specific screen before page overflow is detected.
Maximum Form Length	A field used in the definition of a report version to indicate the length of the form on which the requested report is to be printed. This is expressed in lines per page.

Field	Explanation
Maximum Form Width	<p>A field used in the definition of a report version to indicate the width of the form on which the requested report is to be printed.</p> <p>The standard form width is 132 characters. If more than 132 is specified, you must compress printing to 15 characters per inch.</p>
Align Page (Y.N)	The Align Page field specifies whether the forms must be aligned in the printer before printing is started.
Source Drawer (1/2/3)	The Source Drawer field specifies, for 3812, 4214, and 5219 printers, the source drawer (paper feed drawer) to be used when automatic cut sheet feed mode is used. Refer also to data item "FMFD".
Font ID	The Font Identification field specifies, for the 3812, 4224, and 5219 printers, the font identifier to be used with this printer device file. Refer to the IBM Control Language Reference Manual for the "FONT" keyword of the "CRTPRTF" command for the valid 3 or 4 character font identifiers.
Form Feed	<p>The Form Feed field specifies, for the 4214 and 5219 printers, the form feed attachment to be used by this printer device file. Valid values are:</p> <ul style="list-style-type: none"> <li>*DEV — Default from device description.</li> <li>*CONT — Continuous forms.</li> <li>*CUT — Single-cut sheets are used. Each sheet is manually loaded.</li> <li>*AUTOCUT — Single-cut sheets are semi-automatically fed into the printer. Forms alignment message WILL NOT be issued.</li> </ul>
Print Quality	<p>The Print Quality field specifies, for the 4214, 4224, 4234, and 5219 printers, the quality of print produced.</p> <p>The valid values are:</p> <ul style="list-style-type: none"> <li>*STD</li> </ul> <p>The output is printed with standard quality.</p> <ul style="list-style-type: none"> <li>*DRAFT</li> </ul> <p>The output is printed with draft quality.</p> <ul style="list-style-type: none"> <li>*NLQ</li> </ul> <p>The output is printed with near letter quality.</p>

Field	Explanation
Control Character	<p>The Control Character field specifies whether the printer device file will support input with print control characters. Any invalid control characters that are encountered will be ignored, and single spacing is assumed.</p> <p>The values are:</p> <p>NONE</p> <p>No print control characters will be passed in data to be printed.</p> <p>FCFC</p> <p>Specifies that the first character of every record will contain an ANSI forms-control character. This value is not valid for externally described printer files; that is, SRCFILE (NONE) was specified on the Create Printer File (CRTPRTF) command. This value is normally used when reprinting spooled files copied to disk using the CPYF command using *LIST.</p>
Graphic Character	<p>The Graphic Character Set field specifies the character identifier (graphic character set and code page) for the file. This parameter allows you to print text that is in different character identifier encodings. The value specified on this parameter is used to command the printer device to interpret the hexadecimal byte string by printing the same characters that were intended when the text was generated.</p>
Separator Pages	<p>The Separator Pages field specifies the number of system-printed separator pages to print prior to printing the report.</p>
Code Page	<p>The Code Page field specifies character identifier (graphic character set and code page) for the file. This parameter allows you to print text that is in different character identifier encodings. The value specified on this parameter is used to command the printer device to interpret the hexadecimal byte string by printing the same characters that were intended when the text was generated. Refer to Graphic Character Set field.</p>

Field	Explanation
Page Rotation	<p>The Page Rotation field specifies, for the 3812, 3816, 3820, 3825, 3827, and 3835 printers, the degree of rotation of the text on the page with respect to the way the form is loaded into the printer.</p> <p>Valid values are:</p> <p>*AUTO</p> <p>Computer Output Reduction is performed automatically if the output is too large to fit on the form.</p> <p>*DEVD</p> <p>Use hardware configuration switches to determine page rotation.</p> <p>*COR</p> <p>Computer Output Reduction is done.</p> <p>0</p> <p>No rotation is done.</p> <p>90</p> <p>Rotation of the text is done 90 degrees clockwise from 0.</p> <p>180</p> <p>Rotation of the text is done 180 degrees clockwise from 0.</p> <p>270</p> <p>Rotation of the text is done 270 degrees clockwise from 0.</p>
User Data	User specified data that describes the file.
Spool File Name	Report spool file name. For FASTR reports, the name will always be R83410 for reports without rows and R83500 for reports with rows. For World Writer, the name will always be QSYSPRT. For DREAM Writer, the name will default to the Form ID with the first character replaced by an R. This may be overridden. Any other type of report requires an entry in this field.
Output Priority	The scheduling priority parameters specify the priority values to be used by the system to determine the order in which spool files will be selected for processing. Each job is given a scheduling priority that is used for both job selection and spooled file output. The job scheduling priority is specified by the JOBPTY parameter in commands like CHGJOB and CRTJOB. The priority value may range from 1 - 9 with 1 being the highest priority and 9 being the lowest priority. You cannot schedule a job with authority greater than your own.

Field	Explanation
Justification	<p>The Justification field specifies hardware justification which controls the printing positions of the characters on a page so that the right-hand margin of printing is regular.</p> <p>Valid values are:</p> <p>0     No justification occurs.</p> <p>50    Spaces are added to the blanks in the text so that the right margin is more closely aligned but not flush.</p> <p>100   The text is expanded by spaces (added where the blanks already exist) until the right margin is flush.</p> <p>NOTE: This keyword applies only on the AS/400.</p>
Duplex Output	<p>A code that determines if and how duplex output printing is used. Valid values are:</p> <p>N     No duplex printing; print on only one side of the paper.</p> <p>Y     Yes, duplex print. Print on both sides of the paper with the top of each page at the same end of the paper.</p> <p>T     Yes, duplex print. Print on both sides of the paper with the top of one printed page at the opposite end from the top of the other printed page.</p>
Printer Device Name	<p>Specifies the name of the printer device description.</p> <p>*SYSVAL - Uses the name of the printer device from the system value QPRTDEV.</p> <p>*JOB - Uses the printer device associated with the job.</p>
Intelligent Printer (Y/N)	<p>Specifies the type of data stream created for a printer file.</p> <p>Y     Indicates an Intelligent Printer Data Stream.</p> <p>N     Indicates a SNA Character Stream.</p>
Print Text	<p>The Print Text field specifies a character string that will be printed at the bottom of each page of the specified report. A maximum of 30 characters are allowed. Refer to "PRTTXT" keyword of the "OVRPRTF" command on the AS/400.</p>

## Change the Date Format on DREAM Writer reports

The standard code for DREAM Writer reports uses a 6-digit date and EDTCDE(Y). If your date format is YMD, both leading 00s do not display on the report heading. For example, 9/01/04 displays rather than 09/01/04 for January 4, 2009. User either of the following to change the date format and then recompile the print file. Do *not* recompile the program.



Print a 4-position year, for example 2009/01/04, in IBM release V4R2 and higher:

In the source code, locate the source line for the report file with the key word DATE. Subtract 2 from the position value (to allow for the extra two digits) and enter (\*YY) immediately after the word DATE. For example, if the DATE key word displays as 117DATE, change it to 115DATE(\*YY). This retrieves the 4-digit year from OS/400. This fix is only available for IBM release V4R2 and higher and uses standard IBM RPG features.

Creating an IBM user defined edit code for dates:

You can use dashes or slashes in your user defined dates. You must complete this task *before* compiling the print files. Use the DSPEDTD command for each of the five EDTD codes (5-9) to determine if one exists.

1. On the command line, enter DSPEDTD 9.
2. In the Integer mask field, there are either dashes or slashes. Dates that display with dashes contain two spaces between the 0 (zero) and the first dash. If dashes are acceptable, proceed to step 5.
3. For slashes, enter DLTEDTD 9on the command line.
4. On the command line, enter CRTEDTD EDTD(9) INTMASK('0 / / ') AUT(\*ALL). There are 2 spaces between the 0 (zero) and the first slash, 2 spaces between the slashes, and two spaces after the last slash. If you enter this command by pressing F4, press F10 to access the Authority field. On the command line, enter DSPEDTD 9 to ensure the date format is acceptable.
5. On the command line, change the EDTCDE(Y) by entering EDTCDE(9) in the DDS source for your reports. Do not make changes to the DATE keyword. Compile the reports and ensure the date format is acceptable.



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# Review Version List Options and Functions Overview

## About DREAM Writer Versions List Options and Functions

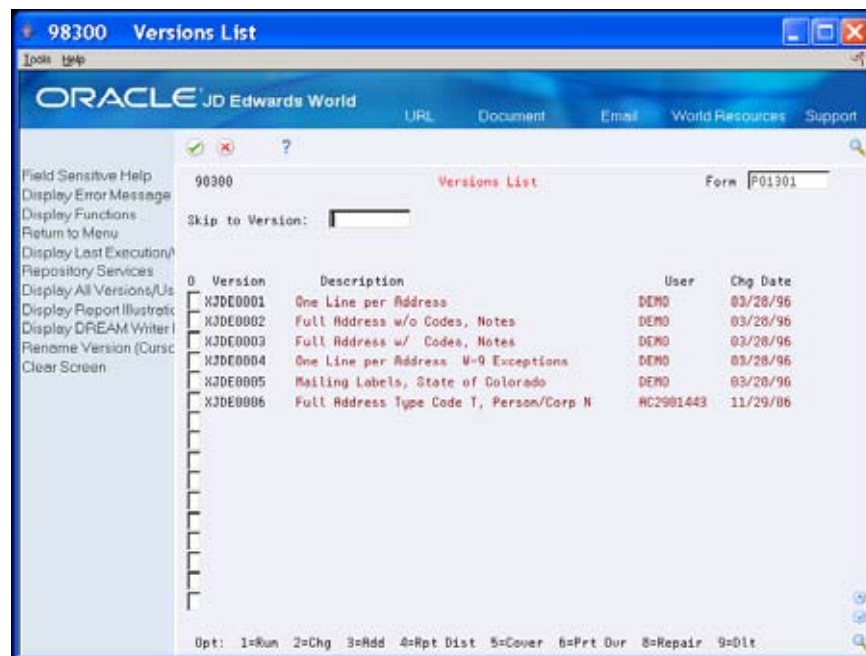
A version list presents a list of versions for a Screen ID and allows you to perform a number of options and functions on each version.

This section contains the following:

- [Reviewing DREAM Writer Version List Options](#)
- [Reviewing Version List Functions](#)

## Reviewing DREAM Writer Version List Options

The following nine options available for working with versions are as follows:



### Option 1 — Execute Version

Submits the version to the job queue after the report has been developed.

## Option 2 — Change Version

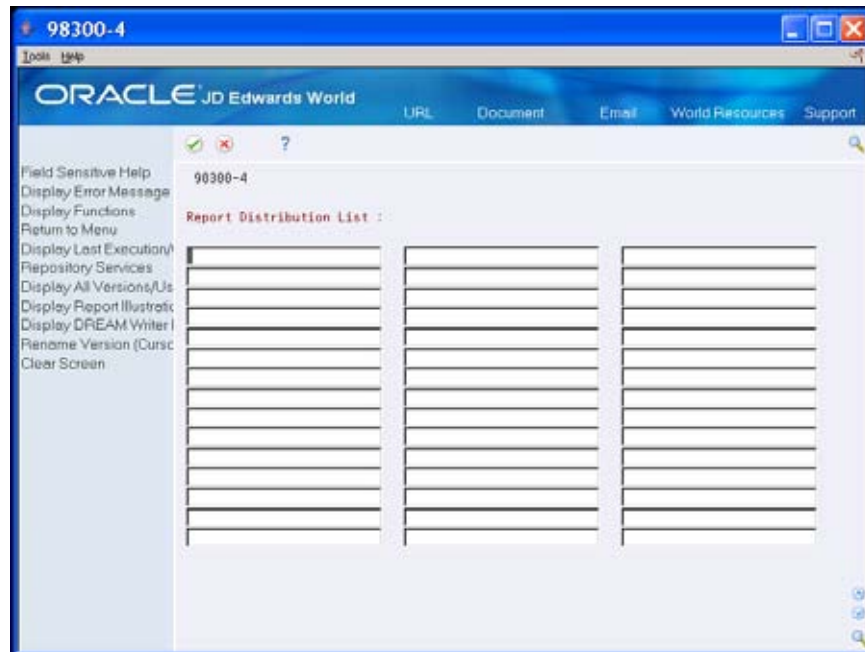
Revise any portion of the version.

## Option 3 — Copy/Add Version

Add a new version that has the same attributes as the existing version.

## Option 4 — Report Distribution

Displays the report distribution form and allows you to enter the names of persons to receive the report.



The distribution list prints on the report's cover page

- You must select to print the Cover Page in Additional Parameters
- You must enter the number of copies in Printer File Overrides because additional copies are not automatic.

## Option 5 — Online Cover Page

Allows you to review processing options, selections, and sequencing without having to use Option 2 to change the report.

## Option 6 — Printer Overrides

Changes printer file overrides without having to use option 2. Useful when having problems with printer or output.

### Option 7 — Display DDS/OPNQRYF Source

Shows the source for the DDS or Open Query file statement being created for the version. Use this option for troubleshooting a version.

### Option 8 — Version Repair

Delete any logical files created by a report version:

- You can use Version Repair to delete a DREAM Writer created logical file that was inadvertently left on the system when it should have been deleted.
- It is not usually necessary to use this for an Open Query style report.
  - File Output Type 1 on Additional Parameters screen.

### Option 9 — Remove Version

Deletes the version for that Form ID. The User Exclusive field allows you to secure against deletes.

## Reviewing Version List Functions

Use the following functions to work with version lists.

### Change Date

Display Last Execution/Change Date (F5) toggles Change Date column to Last Execution Date

### Versions

Display All Versions/User Versions Only (F9) to display your versions only

### Report Illustration

Display Report Illustrations (F13) to display report illustration from the source file. Source code must exist on the system

### Rename a Version

Rename Version (F16) to rename a Version

- Place cursor next to version you are renaming
- Choose Rename Version (F16).

The RENAME VERSION form displays.



You cannot assign a version number that already exists for the Form ID. Do not use an asterisk (\*) in the new version name because the system will use it literally.

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# Review Possible Errors and Joblogs in DREAM Writer

## Reviewing Possible Errors in DREAM Writer

### Error messages

Check for error messages sent to screen.

### Two people cannot be updating the same version at the same time

If you submit a version to execute, and it is waiting in the Job Queue, and you or someone else changes a processing option, selection, or sequence, in a copy of that version, your printed report reflects those changes.

- This is no longer the case in the G/L Post and the Print Source programs and will be changed in other programs with new releases of the software.
- Verify in User Defined Codes, System 00 and Record Type DW.

### Forcing JOBLOG

Normal and Abnormal Messages.

### DDS/OPNQRYP

Check the statement that DREAM Writer generates (selection 7 on DREAM Writer Version List) to make sure you have not requested the impossible.

### A processing option controlling which records are excluded for the report

Check processing options on the cover page.

### Mixing Select and Omit

If you are using a logical file, you cannot have a range of omit values in the middle of a select group. Open query can handle this.

## Check library list in Job Description

Verify the User is accessing the same DREAM Writer file in batch and online.

## File Prefix/Field Names changed since the DREAM Writer was set up

### Hard Coded Level Break logic

- If you change the sequencing, the results can be unpredictable.
- Look at the online help to verify.
- Try running the program in the same sequence as the DEMO Version.

## Reviewing Joblog Messages in DREAM Writer

### Example

CPF1015, Data Area X0028 in \*LIBL not found.

The system always issues this error message.

### Example

- CPF5815, Member F08345002 for file F00DDS in library QTEMP not found.
- CPF7310, Member F08345002 not removed from file F00DDS in QTEMP.
- CPF9999, Function check CPF7310 unmonitored by P8308 at statement \*N.

The system always issues these error messages for a logical file build.

### Example

- CPC4001, Member F0901 file F0901 in JDFDATA opened.
- CPF4123, Open options ignored for shared open of member F0901.

The system always issues these errors for an open query file statement.

### Example

JDE0025, DREAM Writer file (F08345001) specified for P083450 — Version 002 contains no records.

---

**Note:** This is a real error. The system could not find records matching your selection criteria.

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## Example

- CPD3105, Field ABAYPD on QRYSLT parameter not found.
- CPF9899, Error occurred during processing of command.
- CPF9999, Function check CPF9899 unmonitored by 98315 at statement \*N.
- JDE0026, File (F0911) specified for P01301 — Version 035 OPNQRYF command failed.

This is a real error. This was caused by changing the based-on file name.



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## **9 Additional DREAM Writer Options**



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# Overview to Additional DREAM Writer Options

## About Additional DREAM Writer Options

DREAM Writer has additional options that you can use to do the following:

- Customize the processing option form in DREAM Writer
- Print the cover page for all DREAM Writer Versions
- Copy a version to the same library with a different name, or to copy a version to another library
- Override DREAM Writer versions on a global basis
- Set up a table that defines versions that are recursive
- Remove recursive version parameters left in the DREAM Writer file
- Archive or delete DREAM Writer, FASTR, STAR, and World Writer report versions



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# Review the Additional DREAM Writer Options

## Reviewing the Additional DREAM Writer Options

This section contains the following:

- [Reviewing Processing Options Set-Up](#)
- [Reviewing Versions Print](#)
- [Reviewing Copy/Move DREAM Writer Parameters](#)
- [Reviewing the Global Versions Print Override](#)
- [Reviewing Recursive Versions Set Up for DREAM Writer](#)
- [Reviewing Recursive Versions Global Delete for DREAM Writer](#)
- [Reviewing the Report Manager](#)

## Reviewing Processing Options Set-Up



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **DREAM Writer**  
From DREAM Writer (G81), choose **Processing Option Set-up**

The Form ID's Processing Options Set-up option number and editing sequence are established with the program. DREAM Writer is then used to write the text for the processing option and to show how it will appear on the processing option form.

When adding custom or additional processing options, add 10 to the last processing option used. You need to code the program to handle any new processing options that you add.

F18 designates language-specific processing options. See *About Language and Jargon* for more information.

Seq	Text	Opt Date	R Text	D	O	Field
2	DEFAULT PROCESSING:	13	0	0	1	
3	1. To override standard journal entry	13	0	0	0	
4	processing (DREAM Writer KT091121,	13	0	0	1	
5	version ZJDE0001), enter an override	13	0	0	1	
6	version.	13	0	0	1	
7		13	0	0	1	
8	WARNING: This should only be	13	0	0	1	
9	changed by persons responsible for	13	0	0	1	
10	system wide setup.	13	0	0	1	
11		13	0	0	1	
17	2. Does the default ledger type from	14	0	0	0	
18	the journal entry processor version	14	0	0	1	
19	have to balance (1/0)? The default	14	0	0	1	
20	of 0 will require balancing.	14	0	0	1	
21		14	0	0	1	

Opt: 1=Insert Line 2=Resequence 9=Delete Line F10=Preview F18=Language

Field	Explanation
Seq	<p>This number is used to control the sequence of Processing Options, DDS Selection values and DDS Key sequences.</p> <p>The sequence number is relative, meaning that the sequence need not start 001, 002, etc. A sequence of 003 and 005 sorts the report with the 003 field before the 005 field.</p> <p>For Financial Reports, company MUST be sequence 001 in order to access the specific company Automatic Accounting Instruction (AAI) records. If company is not sequence 001, company 00000 AAIs are used.</p>
Text	<p>The title that appears at the top of the report. It can include up to three lines with 40 characters each. The lines are automatically centered on the report.</p> <p><i>Form-specific information</i></p> <p>The descriptive text for the processing option.</p>
Opt Nbr	<p>The Processing Option Number field specifies for DREAM Writer processing options the array index position for each processing option. This number should never change once assigned. The sequence number of processing options may be changed to allow for better presentation on the Processing Options Entry program but the processing option number should never be changed. This field is not input capable for existing lines of text.</p>



Field	Explanation
Date (1/0) (0/1/2)	<p>The Date Field specifies whether or not the processing option refers to a date.</p> <p>Valid values are:</p> <ul style="list-style-type: none"> <li>0 Indicates that the information is not a date.</li> <li>1 Indicates that a date is to be stored in the processing option as a Gregorian date in month, day and year format.</li> <li>2 Indicates that a date is to be stored in the processing option as a Julian date in century, year and day format.</li> <li>3 Indicates the same as a "2" with the exception that the display AND entry format is "YYYY/MM/DD" (full four digit year).</li> </ul> <p>NOTE: All data entry for date information is entered in SYSTEM FORMAT with the exception of the "3".</p>
R J	<p>Valid codes are:</p> <ul style="list-style-type: none"> <li>1 The processing option information to be entered is numeric and should be right justified.</li> <li>2 The processing option information to be entered is to be right justified and left-filled with blanks (e.g. business unit edit).</li> </ul>
Text Only	<p>The Text Only field is used to specify whether the text line is text only or a processing option value entry line. This allows you to specify multiple lines of text to document each processing option. The values for this field are</p> <ul style="list-style-type: none"> <li>1 For text only</li> <li>0 For a value entry line</li> </ul> <p>Each separate processing option can have only one input value, or "0" value.</p>
D L	<p>This field controls which processing options are displayed to a user based upon the user's Display Level value in the JD Edwards World User Information file. Display Levels are optional. If the processing option's Display Level value is greater than the user's Display Level, the processing option text does not appear.</p>
O P	<p>Selection exit codes are options and function keys that are used to perform a specific function for a selected line or form of data. The most commonly used selection exits for each program are displayed in highlighted text at the bottom of the screen. To display all available selection exits, press F24. Press F1 in the Option field to display all available Options for the program.</p>

## Reviewing Versions Print



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **DREAM Writer**  
 From DREAM Writer (G81), choose **Versions Print**

Use the versions print selection to print the Cover Page for all DREAM Writer Versions.

You can print a cover page for a specific screen and version.

### To review Versions Print

Add, Change, or Run a version.

**98300 Versions Print**

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
 Display Error Message  
 Display Functions  
 Return to Menu  
 Display Last Execution  
 Repository Services  
 Display All Versions/Us  
 Display Report Illustrat  
 Display DREAM Writer  
 Rename Version (Cursc  
 Clear Screen

98300 Versions Print Form P98320

Skip to Version:

Version	Description	User	Chg Date
XJDE0001	Print Cover Page - Complete	DEMO	11/14/91
XJDE0002	Print Cover Page - Specific Form	DEMO	11/14/91
XJDE0003	Print Cover Page - Specific Form/Version	DEMO	11/14/91
XJDE0004	Print Cover Page - Special (MCH)	DEMO	11/14/91
XJDE0006	Print Cover Page - Core Systems	DEMO	11/14/91
XJDE0008	Print Cover Page - Distribution	DEMO	11/14/91
XJDE0009	Print Cover Page - Financial/Budgeting	DEMO	11/14/91
XJDE0010	Print Cover Page - Job Cost	DEMO	11/14/91
XJDE0011	Print Cover Page - Specific Form	DEMO	11/14/91
XJDE0013	Print Cover Page - Payroll	DEMO	11/14/91
XJDE0014	Print Cover Page - Specific Form/Version	DEMO	11/14/91
XJDE0015	Print Cover Page - Distribution	DEMO	11/20/91

Opt: 1=Run 2=Chg 3=Add 4=Rpt Dist 5=Cover 6=Prt Our 8=Repair 9=Del

## What You Should Know About

Banner Page	Description
<b>Suppressing a banner page</b>	<p>In addition to a cover sheet, which lists the DREAM Writer parameters, a banner or header page may also print.</p> <p>To suppress this page from printing:</p> <ol style="list-style-type: none"> <li>1. On the Command Line, enter CHGPRTF (change print file) and press F4.</li> <li>2. Enter the name of the report at the File prompt (for example, R04423).</li> <li>3. Press F10 (for additional parameters) and page down until you locate the File Separators field.</li> <li>4. Change the value in this field to 0 and press Enter.</li> </ol> <p>If the system continues to print a banner or header page it might contain data similar to what is shown below:</p> <p>Job name : J04305____</p> <p>User name : JV5443249</p> <p>Job number : 455357</p> <p>Date : 08/01/95</p> <p>Time : 16:44:16</p> <p>John Vakoc</p> <p>If it looks similar, there is an IBM header page that is system wide. To turn off this option, you can enter STRPRTWTR for the printer and change the File Separators field to 0.</p> <p>If you want some reports to have the cover page, enter STRPRTWTR on a menu command line and change the number of separators to *FILE. Then enter CHGPRTF on the menu command line. Enter the report name and change the File Separator to 0. You can also enter the command CHGOUTQ to change the Job Separator to 0.</p>

## Reviewing Copy/Move DREAM Writer Parameters



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **DREAM Writer**  
 From DREAM Writer (G81), choose **Copy/Move DW Parameters**

You must create all DREAM Writer files in a custom library if you are copying an existing DREAM Writer to customize or use as a guide in creating a new version.

This option works with FASTR, but not with World Writer.

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**Note:** This is a copy, not a move.

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Use this option to retrieve a DREAM Writer from JDFDATA if it is accidentally deleted from your production file.


## To review Copy/Move DREAM Writer Parameters

Complete the fields and click Enter.

Field	Explanation
From Library	The Library Name field contains the name of a valid AS/400 library name.
To Library	The Library Name field contains the name of a valid AS/400 library name.
From Form ID	This screen name is the name of the RPG program which controls the function format of this DREAM Writer report. For FASTR and P & E FASTR reports, the screen name can normally be any name the users may create.

Field	Explanation
Version Range Start	<p>Determines the lowest version number to be copied from the From Form ID field to the To Form ID field. You must enter an appropriate Version Range Start, for example, ZJDE0001.</p> <p><i>Form-specific information</i></p> <p>If you are using either of the copy functions from ASI Work with Instructions programs, you can determine the available versions in the JDFDATA library by viewing the new version from the ASI Inquiry/Update form.</p> <p>If you are using the Copy/Move DW Parameters from G81, you need to know the beginning version number you want to copy.</p>
Version Range End	<p>Determines the highest version number to be copied from the From Form ID field to the To Form ID field. You must enter an appropriate Version Range End, for example, ZJDE9999.</p> <p><i>Form-specific information</i></p> <p>If you are using either of the copy functions from ASI Work with Instructions programs, you can determine the available versions in the JDFDATA library by viewing the new version from the ASI Inquiry/Update form.</p> <p>If you are using the Copy/Move DW Parameters from G81, you need to know the ending version number you want to copy.</p>
To Form ID	<p>This form name is the name of the RPG program that controls the function of this DREAM Writer selection. For FASTR and P &amp; E FASTR reports, the screen name can normally be just about any name the users may think up. The controlling program for these types of forms is always the same.</p>
Add or Replace	<p>Specifies whether the versions you copy replace the versions in the To Form ID or are added to the list of existing versions. Valid codes are:</p> <ul style="list-style-type: none"> <li>A Add the versions to the current versions list. This is the default value.</li> <li>R Delete all existing versions in the Screen ID being copied to and then copy the specified versions, keeping their current version numbers.</li> </ul>

## Reviewing the Global Versions Print Override

	<p>From Master Directory (G), choose <b>Hidden Selection 27</b></p> <p>From Advanced &amp; Technical Operations (G9), choose <b>Run Time Setup</b></p> <p>From Run Time Setup (G90), choose <b>DREAM Writer</b></p> <p>From DREAM Writer (G81), choose <b>Global Versions Print Override</b></p>
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Use this option to override DREAM Writer Versions on a global basis.

This job changes existing DREAM Writers in the DREAM Writer file. If you want to change the defaults so that all newly created DREAM Writers also have the new values, you must change the default values in the Data Dictionary. Press F1 on the field to obtain the data item name, then change the default value field in the Data Dictionary for that item.

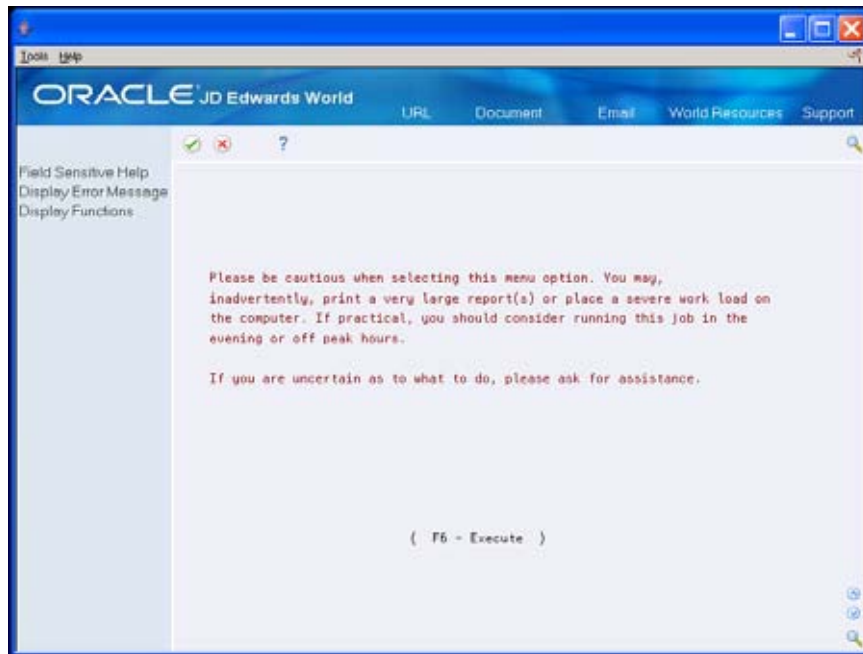
When changing the default value field for an item in Data Dictionary, be aware of the following:

- A blank means no change has occurred.
- An asterisk (\*) means that the default parameter for that field should be retrieved from the Data Dictionary.
- The field being changed is only changed for that Form ID.
- This utility does not work on special forms.
- This utility can be used if you get a new printer and the specifications need to be changed.

An alternative to this utility is to use the IBM command CHGPRTF\_R\*.

## To review the Global Versions Print Override

1. Press F6 to execute the program after reading the runtime message.



2. Complete any of the following fields and click Enter.

Field	Explanation
Form Id: From	The RPG report program name that defines the report template.
Print Queue	A designation of a specific print queue, such as QPRINT. If left blank, this field defaults to the print queue specified in your user profile.
Lines/Inch (4/6/8/9)	The line spacing should be entered as the number of lines per inch and must be supported by your printer. The valid values are: 4 IBM 5219, 5224, 5225, and 3287 printers only 6 IBM 5224 printer only 8 IBM 5224 printer only 9 IBM 5225 printer only The standard computer print is 6 LPI and 10 CPI. If you are printing on 8 1/2" x 11" paper, you would specify 8 LPI and 15 CPI.
Char./Inch (10/15)	The horizontal printing density. This should be entered as the number of characters per inch and must be supported by your printer.
Number of Report Copies	The number of copies of this report to be printed. One copy is the default.

Field	Explanation
Hld in Prt Queue(Y/N/S/T)	<p>This flag is used to determine whether to hold the print file in the print queue rather than printing it.</p> <p>Valid values are:</p> <p>Y     hold on the print queue</p> <p>N     do not hold on the print queue</p> <p>S     same as Y but print file will be saved on the print queue</p> <p>T     same as N but print file will be saved on the print queue</p> <p>Note: You can use 1 for Y and 0 (zero) for N.</p> <p>UPGRADE PLANNER: If you are entering information into your Upgrade Plan, the following values are valid:</p> <p>1     hold on print queue</p> <p>0     do not hold on the print queue</p>
Maximum Form Width	<p>A field used in the definition of a report version used to indicate the width of the form on which the requested report is to be printed.</p> <p>The standard form width is 132 characters. If more than 132 characters is specified, you must compress printing to 15 characters per inch.</p>
Maximum Form Length	<p>A field used in the definition of a report version to indicate the length of the form on which the requested report is to be printed. This is expressed in lines per page.</p>
Location of Page Overflow	<p>A field used in the definition of a report version to indicate the number of lines to be printed on a specific form before page overflow is detected.</p>
Form Type	<p>A field used in the definition of a report version used to indicate the special forms number to be used in the printing of a particular report.</p>

## Reviewing Recursive Versions Set Up for DREAM Writer



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **DREAM Writer**  
 From DREAM Writer (G81), choose **Recursive Versions – Set-up**

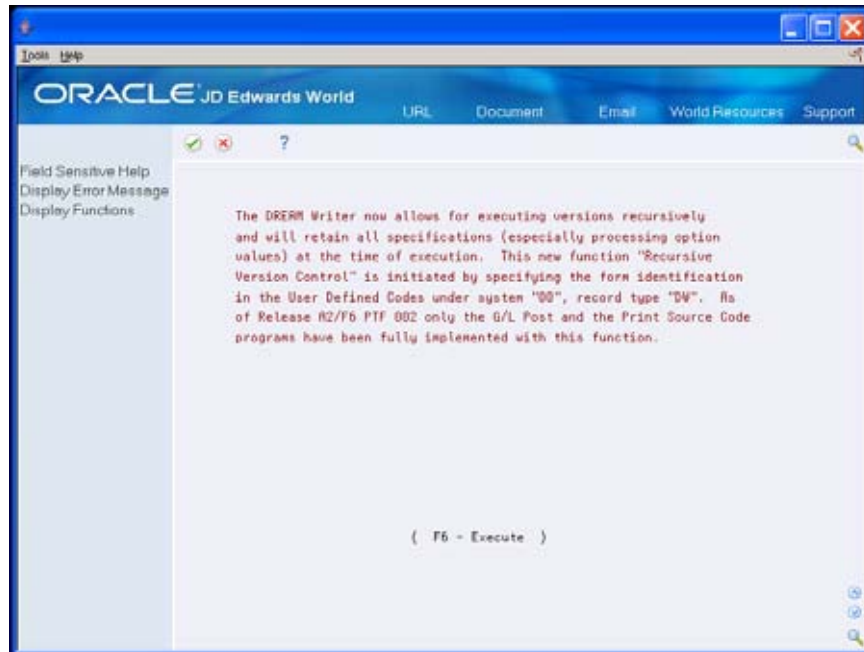
Use this utility when more than one user submits the same version at the same time. This allows you to maintain your own set of processing parameters, even when using the same version concurrently with another user. For example, there is only one version for GL Post. If more than one post is submitted at one time, the parameters for the last one submitted could be used for both.



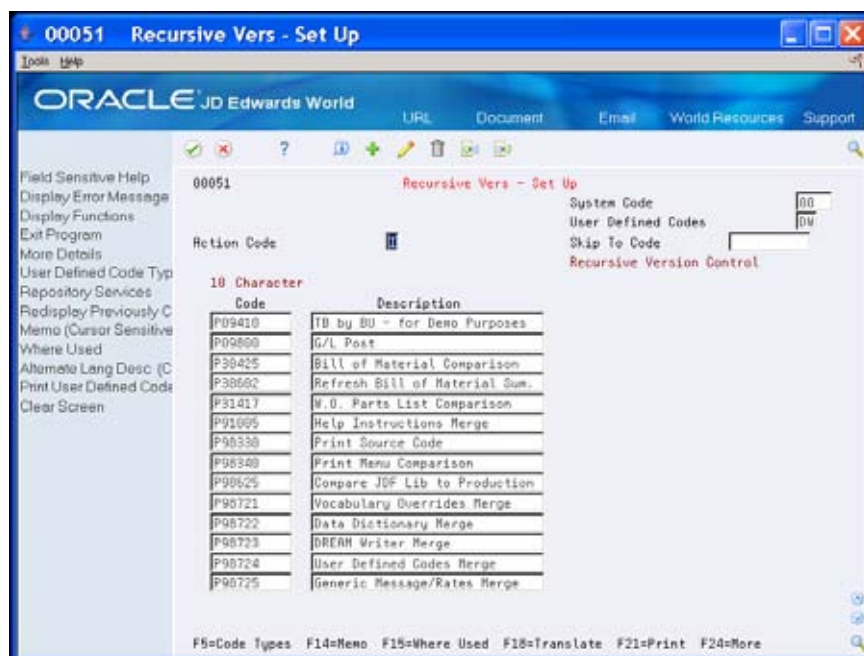
JD Edwards World has created a table of the versions that could cause problems. If you have a specific version that your users run often, you should add this version to the list.

## To review Recursive Versions Set Up for DREAM Writer

1. Press F6 to execute the program after reading the runtime message.



2. Complete any of the following fields and click Enter.



## What You Should Know About

Recursive Versions	Description
<b>Recursive Versions</b>	<p>If you add a version to the 00/DW list, your version leaves the +PXXXX objects behind after the job runs. To avoid this build up of versions, write a clean-up program.</p> <p>Duplicate parameters use a plus sign (+) preceding the form ID. To tie the job run with the version submitted, you must print the cover page.</p> <p>You can view the version changes by displaying a DREAM Writer Form ID processing option. For example, P09800, the post program.</p> <p>The recursive versions process is:</p> <ul style="list-style-type: none"> <li>Version 001 is submitted to JOBQ</li> <li>Version 001 is submitted again to JOBQ. The second version is given a unique name</li> <li>The system runs each version and then deletes it.</li> </ul>

## Reviewing Recursive Versions Global Delete for DREAM Writer



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **DREAM Writer**  
 From DREAM Writer (G81), choose **Recursive Versions – Global Dlt**

The operation does the following:

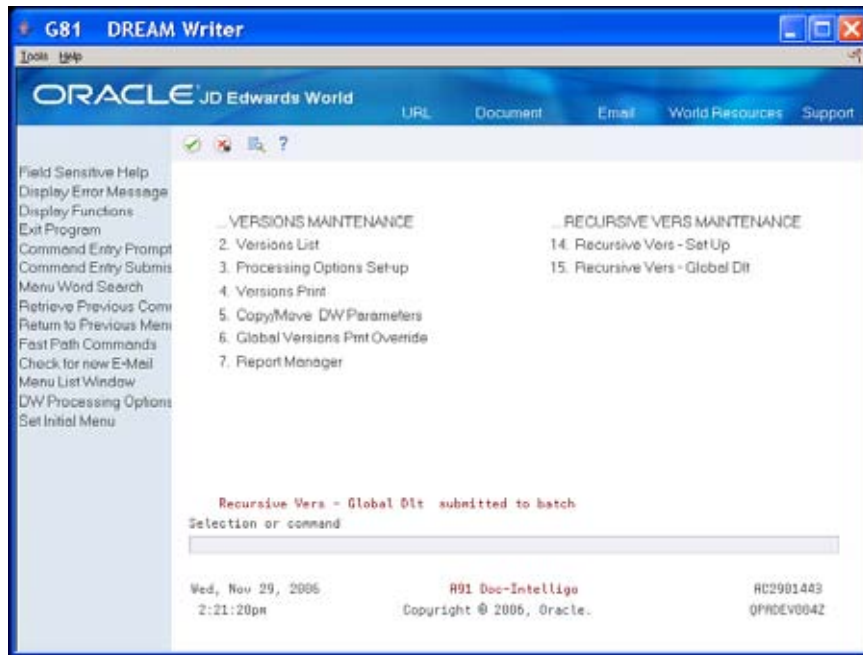
- Removes recursive version parameters left in the DREAM Writer file.
- Reads through the whole file, and deletes those records that are preceded with a plus sign (+).

P98310 numbers the DREAM Writer versions from 0001 through 9999. Once the job is run, the system deletes that recursive version. However, versions that never go through the JOBQ remain in the files. For this reason, it is possible that the files can eventually contain all the 9999 versions available. When this happens, you cannot submit the job.

Run the Recursive Versions Global Delete program (P98305G) to delete all DREAM Writer forms that are set up as recursive. This program deletes the records in the DREAM Writer files with the + sign in front of the form ID. You can set up this program to run periodically in sleeper mode.

### To review Recursive Versions Global Delete for DREAM Writer

Choose Recursive Versions Global Delete to run the program.



The system displays a line of text at the bottom of the DREAM Writer menu informing you that it submitted the recursive version's global delete to batch.

## Technical Considerations

### Recursive Versions Set Up

If a program is set up to run recursively, the processing options you select at the time you submit the version are maintained throughout the processing of the job. For example, you submit a version of the batch post program with a batch number specified in the processing options. The job has not yet run and is in the JOBQ. The same version of the program is submitted with a different batch number. It is also in the JOBQ waiting to run after the first one. Because the batch post program is set up to be recursive, both versions will run with the different batch numbers specified when submitted. If the program was not recursive, both versions would run with the batch number specified for the second submit.

When you submit a DREAM Writer, the system checks the UDC table 00/DW to determine if the DREAM Writer form ID is set up to be recursive. If the form ID is found, the program places a plus sign + in front of it. Then program P98310 copies the version and appends a 4-digit counter to the version name. For example, when you submit P42565 version POSTBATCH, the system creates +P42565 and submits version POSTBA0001.

P98310 creates version numbers by appending a 1 to the original version. If that version is in use, the system creates the next available number. For example, if recursive versions POSTBA0001, POSTBA0003 and POSTBA0005 exist, the system names and submits the next version POSTBA0002. The next one you submit after that will be POSTBA0004.

When the job ends, the system deletes the version from the DREAM Writer Master Parameter file (F98301). The versions remain in the file only if you delete the version from the JOBQ before you run the job.

JD Edwards World ships some form IDs set up to be recursive.

## What You Should Know About

OUTQ	Description
<b>Changing Default OUTQ Library</b>	<p>Locate the OUTQ library by pressing F1 in the Print Queue field on the Global Versions Print Override screen. The Object Search Window displays the objects.</p> <p>Change the default OUTQ library in the Object List Overrides program on the Security Officer menu (G94).</p> <p>On the Object List Overrides screen, enter *OUTQ in the Object Type field to locate the library. Place the cursor in the Library field for the *OUTQ object type and enter the default library name. To verify your change, access the Global Versions Print Override screen and press F1 in the Print Queue field to view the new default library in the Object List Window.</p> <p>If you do not have an *OUTQ on the Object List Overrides screen, you can add one. Enter *OUTQ on a blank line in the Object Type field and enter the desired library in the Library field.</p>
<b>Limiting changes to the OUTQ Library</b>	<p>Limit user changes to the default OUTQ library in the Object List Overrides program on the Security Officer menu (G94).</p> <p>To prevent changes to the OUTQ Library on the Object Search Window, use the Object List Overrides screen. Enter 0 in the Allow Changes field for the Object Type *OUTQ. A value of 1 in this field permits user to make changes.</p>

## Reviewing the Report Manager

You use the Report Manager programs to gather information about DREAM Writer, FASTR, STAR, and World Writer report versions. You can view the version information, determine how and where your company uses the versions, and then choose whether to keep, archive, or delete the versions. This functionality allows you to organize an environment before an upgrade and to maintain your report versions. You can use the Report Manager programs in the various environments on your system, such as test or production.

The Report Manager is a three-step process:

1. Build the workfile to capture data about all report versions, including information about how personnel use the versions.

2. Use the Report Manager Workbench to review information about the reports and determine whether to keep, delete, or archive the reports.
3. Run the Batch Archive to archive or delete the report versions.

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**Note:** The Report Manager Workbench and Batch Archive programs allow access to JD Edwards World system files. You should restrict access to these programs using menu security. You can use action code security on the Report Manager Workbench (P98600) to allow users view-only capability.

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## Before You Begin

Select READ ME FIRST on the Report Manager menu (G98RMGR) for information message about the Report Manager process.

## Building the Report Manager Workfile



From Report Manager (G98RMGR), choose **Build Report/Version Workfile**

The Build Report/Version Workfile program (P98570) is the initial program you use in this process. The program collects data about your report versions such as Form or Group ID, Version Name and Description, and User ID and stores the information in the Report Manager Parameter Work File (F98570). However, the Last Executed Date and Version Description fields are not stored in the workfile.

All report versions exist on a Version List screen. Versions can also exist on a Menu, in Sleeper, with a generic function key, or a program calls the version. The program indicates whether a version exists only on the Version List screen, or whether it exists on a Menu, in Sleeper, with a generic function key, or a program calls the version.

You create a version of the workfile as you create any other DREAM Writer version. Use the processing options to control the following:

- Include all reports or omit certain types of reports.
- Create a new workfile and the system stores the version statuses in the F98570 file or keep the statuses from a prior version of the workfile which the system stores in the F98570PRV file.
- Remove recursive versions as the system builds the workfile

## Processing Options

See [Scan Report/Version files \(P98570\)](#).

## Printing the Report Manager Workfile



From Report Manager (G98RMGR), choose **Print Report/Version Workfile**

After the system builds the workfile, you can use the Print Report/Version Workfile program (P98570P) to print the workfile.

Use Data Selection to choose what data appears on the report. Use the data sequence to sequence the report by the fields in the workfile, including Product Code, User ID, or Based On File. You can use this as a working copy for other users to review the detail in the workfile and determine the outcome of the versions in the workfile. For example, you can print a report for the Payroll department using 05, 07, and 08 for the Product Code.

The Last Executed Date and Version Description fields are not available in the report.

## Working with the Report Manager Workbench



From Report Manager (G98RMGR), choose Report Manager Workbench

The Report Manager Workbench program (P98600) displays the information the Build Report/Version Workfile program gathers. You use the Report Manager Workbench to review and manage the information the system gathers. You can use the workbench to locate reports by version name, user ID, use within the environment, and so forth. The Executed Date and Version Description fields contain the most recent execution date and description of each version. You can also enter various data on the Report Manager Workbench screen to view where you use versions in this environment. For example, you can view versions in Sleeper, on a Menu, and on the Version List screen.

As you review the information in the workbench, you determine whether to keep, delete, or archive a report. Additionally, you can enter a remark with a report on the Report Status Change window. For example, you might find that a version needs further review by an individual on your staff; you can enter a remark to indicate this.

When you choose to archive or delete a version, you enter a date in the Effective field in the Report Status Change window. You use the date to control when you delete a version. The system uses this date when you run the Batch Archive program and this allows you to retain versions in the system until you make a decision to keep, archive, or delete the version. You cannot delete report information from the workfile using the workbench.

You can only mark versions for the system to delete that are on the Versions List. If you attempt to delete versions that exist on a Menu, in Sleeper, from a Generic Function Key, or from a program, the system disregards the command. To delete a version on a Menu, in Sleeper, from a Generic Function Key, or from a program, access the appropriate screen, by entering 1 in the Option field, and remove the version.

If a user submits a version after you build the workfile, the system updates the Executed Date in the workbench. You view the most recent Executed Date each time you access the Report Manager Workbench. As you manage your reports, users should not submit versions except as part of your daily business processes. This helps ensure you use the date in the Executed Date field effectively to manage the report versions.

On the Report Manager Workbench screen, you can use the following functionality:

- \* (asterisk)
  - Enter an \* (asterisk) in the first position of any field to have the system disregard the data in that field when you perform a search.
  - Display all records by entering an \* (asterisk) in all fields.
  - Use F22 to enter an \* (asterisk) in the first position of all fields. This clears data in all fields.
- Choose data to view:
  - Review recent use of versions by entering the appropriate dates in the Execution Date - From and Thru fields.
  - Locate versions that have never been run by entering an \* (asterisk) in the From field and a 0 (zero) in the Thru field.
  - Determine which reports, either DREAM Writer or World Writer use a particular file, by entering the Based On File name in the Reference field. For World Writer, the system uses only the first file number on the Version Title & Files screen.
  - Review remarks and the date of the review, by pressing F4.
  - Enter any User ID to locate all reports that individual uses.
  - Enter a Form or Group ID to display only those versions.
  - Review reports at a particular status by entering that status in the Status field.
  - Use the System Use field to locate where versions are in the environment. For example, a DREAM Writer that is on a menu.
- F13
  - Repeats the entry in the Option field to mark many versions the same way. Using F13 marks all of the entries on one page. Page down until you view all of the items you want to mark. Page up to the first entry, complete the Option field, and press F13. The system enters the number in the Option field for all of the entries on the pages you viewed. If the system prompts you to enter data on the Report Status Change window, the system enters this data with each report version.
  - Clears the entries in the Option field where you have marked many versions the same way. Clear the entry in one Option field, place the cursor in an adjacent Option field and press F13.

## To work with the Report Manager Workbench

1. On Report Manager Workbench, do one of the following:

To view all data in the workfile, leave the default \* (asterisk) in all of the fields and press Enter.

To view select data in the workfile, complete any of the following fields and press Enter.

- Status
- Form/Group
- Version
- User
- System Use
- Reviewer
- Reference
- System Code
- Execution Date – From
- Execution Date – Thru

The screenshot shows the 'Report Manager Workbench' window in Oracle JD Edwards World. The title bar indicates the window ID is 98600. The interface includes a menu bar with 'Tools' and 'Help'. Below the menu bar is a navigation bar with 'ORACLE JD Edwards World' and links for 'URL', 'Document', 'Email', 'World Resources', and 'Support'. The main area is divided into a left sidebar with a tree view containing 'Field Sensitive Help', 'Display Error Message', 'Display Functions', 'Exit Program', 'Repeat Status Change', and 'Clear Screen'. The central pane displays the 'Report Manager Workbench' form. This form contains several input fields: 'Status', 'Form/Group', 'Version', 'Reviewer', 'Execution Date - From', 'User', 'Reference', 'System Use.', and 'System Code'. Below these fields is a table with columns: 'Form/Group', 'Version', 'User', 'Sys Use', 'Exc Date', 'Eff Date', and 'Status'. At the bottom of the window, a status bar provides options: 'Opt: 1=Detail Status: 2=Remarks, 4=Archive, 6=Keep, 8=Clr, 9=Delete #13=Repeat'.



Field	Explanation
Status	<p>Enter a user-defined code (98/BS) for the status of the version. For example, to review all reports with remarks, enter remarks.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>▪ Blank – No status</li> <li>▪ * - Ignore</li> <li>▪ Archive – Remove and save this version.</li> <li>▪ Archived – Version has been archived.</li> <li>▪ Delete – Remove this version.</li> <li>▪ Deleted – Version has been deleted.</li> <li>▪ Keep – Keep this version.</li> <li>▪ Remark – Remarks only.</li> <li>▪ See Pgm – Program calls this DW (DREAM Writer).</li> <li>▪ See Setup – Menu/Sleeper/Gen FK setup.</li> </ul>
Form/Group	Enter the name of the object. For DREAM Writer, FASTR, and STAR, enter the Form ID. For World Writer, enter the Group ID.
Version	Enter a version name.
User	Enter the IBM defined user profile. This is the user ID of the person that created or last modified a version.
System Use	<p>Enter a user-defined code (98/BU) for the location of the version. For example, enter menu to view all versions that you access from a menu.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>▪ * - Ignore</li> <li>▪ DWVL - DREAM Writer version list</li> <li>▪ FASTR – Financial Reporting Versions (FASTR)</li> <li>▪ GENFK – Generic Function Key versions, if you have localization software on your system, release A8.1 and beyond.</li> <li>▪ Menu – Menu versions</li> <li>▪ PGMREF - Program Reference entries</li> <li>▪ SLEEPER – Sleeper versions</li> <li>▪ STAR – Fixed Asset Reporting versions (STAR)</li> <li>▪ WWVL - World Writer versions list</li> </ul>
Reviewer	Enter the IBM defined user profile of the individual that reviewed the version.

Field	Explanation
Reference	Enter the name of the object. <i>Screen-specific information</i> Use this field locate reports within the environment. For: <ul style="list-style-type: none"> <li>Reports - enter the Based On File name.</li> <li>Menus - enter the menu name.</li> <li>Generic function keys - enter video (screen) name.</li> <li>Program reference - enter the calling program name.</li> <li>Sleeper - enter the frequency.</li> </ul>
System Code	Enter a user-defined code (98/SY) for the system code. For example, enter 09 for General Accounting.
Execution Date – From	Enter a date.
Execution Date – Thru	Enter a date.

**98600 Report Manager Workbench**

Oracle JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Repeat Status Change  
Clear Screen

98600  
Status  
Form/Group P09800  
Version  
Reviewer  
Execution Date - From Thru

**Report Manager Workbench**

Post General Ledger  
User System Use  
Reference System Code

Form/Group	Version	User	Sys Use	Exc Date	Eff Date	Status
P09800	Z70E0012	DEMO	DWVL	11/15/91		
P09800	Z70E0013	DEMO	DWVL	11/15/91		
P09800	Z70E0013		Menu			See Setup
P09800	Z70E0013		Menu			See Setup
P09800	Z70E0014	DEMO	DWVL	10/04/96		
P09800	Z70E0014		Menu			See Setup
P09800	Z70E0015	DEMO	DWVL	11/15/91		
P09800	Z70E0016	DEMO	DWVL	09/08/97		
P09800	Z70E0016		Menu			See Setup
P09800	Z70E0017	DEMO	DWVL	11/15/91		
P09800	Z70E0018	DEMO	DWVL	02/28/03		
P09800	Z70E0018		Menu			See Setup
P09800	Z70E0019	DEMO	DWVL	04/11/05		
P09800	Z70E0019		Menu			See Setup
P09800	Z70E0019		Menu			See Setup

Opt: 1=Detail Status :2=Remarks,4=Archive,6=Keep,8=Clr,9=Delete #13=Repeat

2. On Report Manager Workbench, press F4 to view details of a version.

Field	Explanation
Exec Date	Displays the most recent execution date.
Reviewer	User ID of the individual to last update the report version.
Review Date	Date the reviewer updated the report version data.
Remk	Remark entered by the reviewer.
Sys Code	System code of the report version.
Reference	Based on system Use. <ul style="list-style-type: none"> <li>DWVL - DREAM Writer version list</li> <li>FASTR – Financial Reporting Versions (FASTR)</li> <li>GENFK – Generic Function Key versions, if you have localization software on your system, release A8.1 and beyond.</li> <li>Menu – Menu versions</li> <li>PGMREF - Program Reference entries</li> <li>SLEEPER – Sleeper versions</li> <li>STAR – Fixed Asset Reporting versions (STAR)</li> <li>WWVL - World Writer versions list</li> </ul>
Description	This field displays the version title from the version list.

### 3. Complete the Option field and press Enter.

When you enter 2, 4, 6, or 9 in the Option field, the Report Status Change window displays.

Field	Explanation
Option	<p>Enter a number to indicate the action the system takes with the version.</p> <p>Values are:</p> <ul style="list-style-type: none"> <li>1 – Display. Use to view details of the version based on system use.</li> <li>2 – Add remark</li> <li>4 – Archive. You can enter any date, including a future date. Leave blank and the system enters today's date.</li> <li>6 – Keep</li> <li>8 – Clear. Use this to remove the status and restore this field to blank.</li> <li>9 – Delete. You can also enter a date, including a future date. Leave blank and the system enters today's date.</li> </ul>

4. On Report Status Change window, complete the appropriate fields.



5. Press F6 to complete your changes or F3 to cancel without updating the information.

## Archiving or Deleting a DREAM Writer version



From Report Manager (G98RMGR), choose Batch Archive

The Batch Archive (P98640) program is a batch process you use to archive (move versions) to a backup library and delete (remove) versions from the environment. You can use a backup library to store the versions and copy them back to the system if necessary. The system removes only those versions on a version list that you mark to archive and delete from the current environment.

When the program encounters a future date in the Effective Date field for a version, it does not delete or archive the version. You must run the program after the date in the Effective Date field to delete and archive those versions.

You can run this program in Proof mode to only produce a report for review. Run this program in Final mode to produce a report, archive and delete the versions.

To confirm that the system removed the versions from the system, you can either review the report the system produces from Final mode or review the current workfile in the Report Manager Workbench. The system changes the statuses from archive to archived and delete to deleted. Alternatively, build the workfile again and access the Report Manager Workbench to confirm that the versions are no longer in the system.

## Processing Options

See [Report Version Archive/Delete Report \(P98640\)](#).



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## 10 Menus





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# Overview to Menus

This section contains the following:

- [Objectives](#)
- [About Menus](#)

## Objectives

- To understand designing menus
- To understand working with the whole menu
- To understand working with menu selections

## About Menus

Menus provide pathways to functions users want to perform. JD Edwards World provides the functionality for you to design menus, customizing the system to meet your business needs.

Complete the following tasks:

- Understand menu design
- Work with menus
- Work with miscellaneous menu utilities



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# Understand Menu Design

This section contains the following:

- [Designing Menus](#)
- [Reviewing the System Flow of Menus](#)
- [Creating Menus](#)
- [Locating Menu Revisions](#)

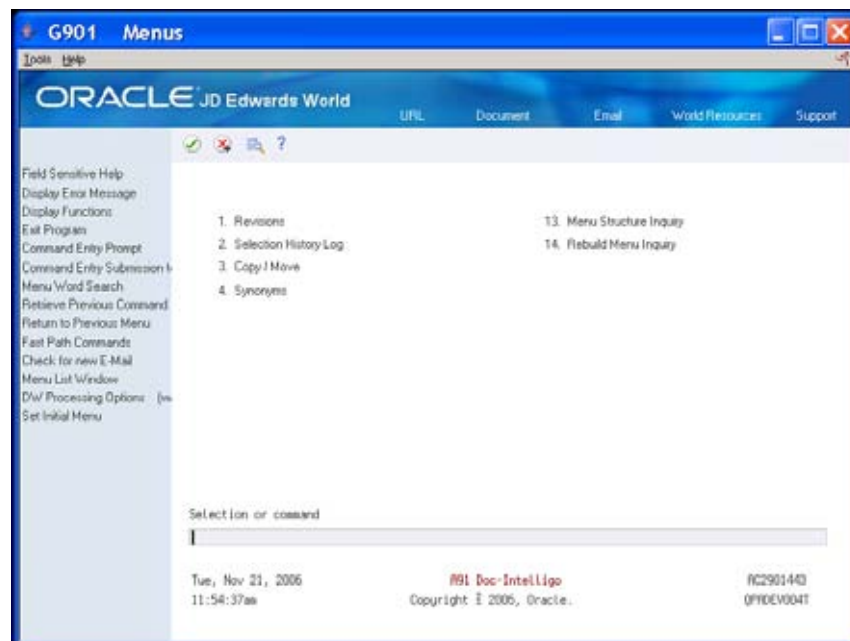
## About Menu Design

### What Does Menu Design Provide?

Menu Design provides you with the functions you need to efficiently design and manage your menus.

While JD Edwards World supplies you with a set of menus that reflects a logical arrangement of selections, you may tailor these menus to the needs and job descriptions of your users or create your own menus.

Use the Menus (G901) menu to design your menus.



## What are the Benefits of Menu Design?

With Menu Design, easily:

- Modify menus without involving programmers
- Tailor menu and menu selections to reflect an organizational culture or structure.

## What Are the Menu Files?

JD Edwards World sends the menu files with all applications. The following are the menu files:

- Menu Master (Header) File (F0082)
- Menu Selection Detail (F00821)
- Menu Selection Text (F0083)
- Menu Selection History (F0082H)

The Menu History File (F0082H) records a user's menu choices and logs related selection information.

View the Menu History Log from menu G901.

Remove the Menu History File (F0082H) if you do not want a menu selections logged. Replace the history file at any time to begin logging again.

## What are the Menu Specifications?

Specifications	Description
Menus	A selection that calls another menu. For example, G091 calls General Accounting Daily Operations Programs.
Programs	A selection that calls a program. For example, J09210 calls the 09210 RPG program.
Interactive programs with DREAM Writer	A selection that calls a particular version of a program. For example, ZJDE0001 calls DREAM Writer version ZJDE0001 of the J09101 program.
Batch programs with Processing Options	A program that sends a job to the queue. For example, J09800 * JOBQ * ZJDE0001 submits the job to the job queue.

You should understand the following about menu design:

- Design menus
- Review the system flow of menus
- Create menus
- Locate menu Revisions

## Designing Menus

Designing menus involves an analysis of organization security. Clients design menus to perform specific functions. For example, an accounts payable clerk enters vouchers. All the options this person needs is contained on that menu.

Clients enter all additions, changes, and deletions through the menu Revisions program. The menu driver (P00MENU) updates the parameter control file that contains all menu parameters.

## Reviewing the System Flow of Menus

The system processes a menu request the following way:

1. Client requests a program from a menu.
2. The menu driver (P00MENU) reads the menu file for information such as the job to execute, what help to present, etc.
3. The menu driver (P00MENU) calls the requested program.
4. The menu driver (P00MENU) updates the history file (F0082H), if the history file exists.

## Creating Menus

Menus provide pathways to functions users want to perform. JD Edwards World' Menu Revisions facility lets you logically group, order, and name functions on a menu so your users can easily access the software necessary to their jobs.

When creating a menu, you define:

- The menu's general information
- Each selection on the menu.

### When You Create the Menu

When creating a menu, you must include the following items:

- Identifying Information, such as ID, title, menu class, display level, and related system code
- Skill level you want to assign to the functions grouped on the menu

The next items are optional when you are creating a menu:

- The advanced/technical operations menu and set up menu to be accessed from this menu, when appropriate
- Security—excluding users from the menu or specific selections

### When You Define Menu Selections

Define each selection with:

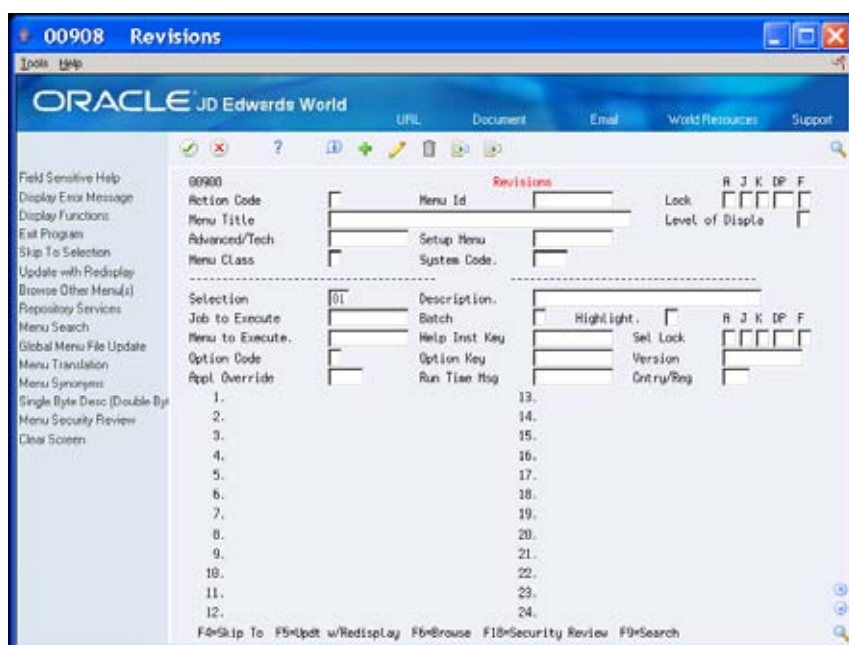
- Description of the selection using a selection title
- Placement of the selection on the menu and whether to highlight that selection
- What job or menu the selection calls
- Whether the function is to be batch or interactive
- Whether to restrict use of a selection to certain users
- How it presents DREAM Writer versions.

## Locating Menu Revisions

	From Master Directory (27), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Run Time Setup</b> From Run Time Setup (G90), choose <b>Menus</b> From Menus (G901), choose <b>Revisions</b>
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### To locate menu revisions

Locate the menu you want to review.



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# Work with Menus

## Working with Menus



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **Menus**  
From Menus (G901), choose **Revisions**

This section contains the following:

- [Creating a New Menu by Copying](#)
- [Copying a Selection \(Browse\)](#)
- [Swapping Selections](#)
- [Deleting Selections](#)
- [Translating Selections](#)
- [Adding a New Menu](#)
- [Deleting the Entire Menu](#)





Field	Explanation
Menu ID	<p>The menu name which can be up to 9 characters. JD Edwards World Standards are:</p> <ul style="list-style-type: none"> <li>Menu numbers are preceded with a G prefix.</li> <li>The two characters following the prefix are the system code.</li> <li>The next characters further identify the menu.</li> <li>The 4th character specifies a specific skill level.</li> <li>The 5th character is used to distinguish between two menus of the same system with the same skill level.</li> </ul> <p>For example, the menu identification G0911 specifies the following:</p> <p>G      Prefix  09      System Code  1      Display Level/Skill Level  1      First menu</p> <p style="text-align: right;"><i>Screen-specific information</i></p> <p>The percent menus are not required to follow the G naming convention but they are required to start with a %, for example %MONTHEND.</p>
Lock	<p>Complete with a user-defined value. This field exists in the JD Edwards user profile and within each menu and menu selection. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. Comparison of the values in the user profile and the menu lock is hierarchical.</p> <p>A blank represents the highest level of authority. A through Z are the next levels, then 0 through 9. The user's value must be greater than or equal to that of the menu lock in the corresponding menu field to access the menu.</p>
Menu Title	A text description of the menu.

Field	Explanation																
Level of Display	<p>Designates the menu skill level. The display level appears under the time in the upper left corner of the current menu only if the menu skill level is greater than that of the user. The display levels are as follows:</p> <table><tr><td>A</td><td>Product Groups (for example, Job Cost, Manufacturing)</td></tr><tr><td>B</td><td>Major Products (for example, GL, AP)</td></tr><tr><td>1</td><td>Basic Operations</td></tr><tr><td>2</td><td>Intermediate Operations</td></tr><tr><td>3</td><td>Advanced Operations</td></tr><tr><td>4</td><td>Computer Operations</td></tr><tr><td>5</td><td>Programmers</td></tr><tr><td>6</td><td>Sr. Programmers</td></tr></table>	A	Product Groups (for example, Job Cost, Manufacturing)	B	Major Products (for example, GL, AP)	1	Basic Operations	2	Intermediate Operations	3	Advanced Operations	4	Computer Operations	5	Programmers	6	Sr. Programmers
A	Product Groups (for example, Job Cost, Manufacturing)																
B	Major Products (for example, GL, AP)																
1	Basic Operations																
2	Intermediate Operations																
3	Advanced Operations																
4	Computer Operations																
5	Programmers																
6	Sr. Programmers																
Advanced/Tech	The advanced operation key is used to direct the menu selection '27' (Advanced Operations) to the appropriate menu.																
Setup Menu	The technical operations control key is used to direct the menu selection '29' (Technical Operations) to the appropriate menu.																
Menu Class	The menu classification indicates the type of a menu. For example, a JD Edwards World Master menu or Company Master menu.																
System Code	A user defined code (98/SY) that identifies a JD Edwards system.																

## Copying a Selection (Browse)

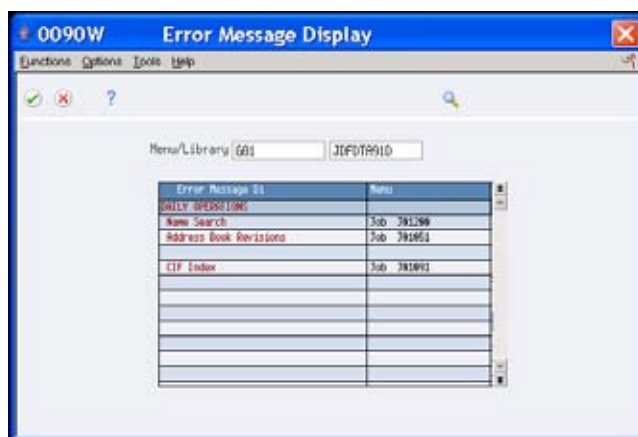
Use this procedure when creating custom menus to add new selections to existing menus in your menu file.

### Before You Begin

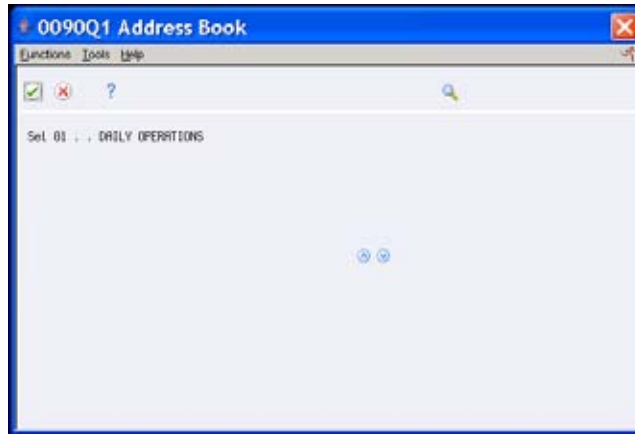
- Locate a menu or create a new menu.

### To copy a selection from another menu

1. On Revisions, enter a number in the Selection field and then choose Skip to Selection (F4) to advance to the selection you want the new selection copied into.



4. To verify the full detail for each menu option, place the cursor next to a selection, and choose Skip to Selection (F4).



5. Page up and page down to scroll through menu selections and detail.
6. Click Exit (F3) to exit this screen.
7. From Menu Information, enter 4 next to the selection you want to copy. The new parameters display for the selection on the Revisions screen.
8. Make any changes you want to the new selection.
9. Click Change.

Field	Explanation
Selection	Used to determine the order of menu items and allow them to be selected by this number.
Description	Contains menu titles and menu selection descriptions.
Job to Execute	The specific job or program number to run. JD Edwards never calls RPG programs directly from menus. Instead, all JD Edwards RPG programs are called through Control Language (CL) programs.  <i>Screen-specific information</i>  For column only versions, use J93410. For row versions, use J83500.

Field	Explanation
Batch	<p>This code designates the method of execution as follows:</p> <ul style="list-style-type: none"> <li>0     Interactive or Video</li> <li>1     Batch</li> <li>2     Delayed (Display a screen to gather information and submit to batch)</li> <li>3     Interactive with return value containing fast path menu instruction</li> </ul> <p>If your menu selection is using the DREAM Writer AND it is a report:</p> <ul style="list-style-type: none"> <li>▪     Enter a code of 0 if you are NOT specifying a DREAM Writer version number. If version number is blank, the DREAM Writer Versions List is displayed. You can then submit a job to batch from this list. In addition, enter 0 if your menu selection is for an online program because online displays cannot be submitted to the batch.</li> <li>▪     Enter 1 if you are specifying a DREAM Writer version number.</li> <li>▪     Enter 2 if your menu selection displays a screen and then submits it to batch. A 2 displays a submitted-to-batch message.</li> </ul>
Highlight	<p>Specifies whether the selection number or both the number and description are highlighted when entering menu selections. The selection number is normally set to high intensity when the selection is driven by processing options. The menu level field in User Information determines whether the menu selection highlights. The field values function as follows:</p> <ul style="list-style-type: none"> <li>0     Normal Intensity</li> <li>1     Selection number high intensity</li> <li>2     Selection number and description high intensity</li> </ul>
Menu to Execute	<p>The specific menu to call as a selection on a menu. To call an IBM menu, use an ampersand '&amp;' as a prefix; for example: &amp;SUPPORT.</p>
Help Inst Key	<p>The Help Start Key is used to cross-reference the menus to specific program help instructions. Typically, this key is simply the program number. It is always preceded with a P as in Program - never a J as in Job. This is the starting key for displaying help instructions for this item.</p>

Field	Explanation
Sel Lock	<p>Complete with a user-defined value. This field exists in the JD Edwards user profile and within each menu and menu selection. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. Comparison of the values in the user profile and the menu lock is hierarchical.</p> <p>A blank represents the highest level of authority. A through Z are the next levels, then 0 through 9. The user's value must be greater than or equal to that of the menu lock in the corresponding menu field to access the menu.</p>
Option Code	<p>This code specifies the function of a menu selection using the DREAM Writer when F18 is pressed. F18 may be locked out by simply replacing code 1 with 3 or code 2 with 4. This code, in conjunction with the version number and the option key, provide the following functions:</p> <p>Code</p> <ul style="list-style-type: none"> <li>1 version — mandatory; option key field — form ID. F18 displays processing options. Selection = blind DREAM Writer execution.</li> <li>2 version — blank option; option key field — form ID. F18 displays DREAM Writer versions list. Selection = DREAM Writer versions list.</li> <li>2 version — not blank; option key field — form ID. F18 displays DREAM Writer versions list. Selection = blind execution, batch.</li> </ul> <p>Review the HELP instructions for Menu Information (Menu Locks) (P0082) for a detailed explanation of codes related to job submission and control.</p>
Option Key	<p>The menu option key refers to the report version form ID. This ID is used either by this processing option or by the report version set up for the program being executed.</p> <p><i>Screen-specific information</i></p> <p>This field is form ID specific, such as GENERAL, JOB COST, and so on.</p>
Version	<p>Version identifies a specific set of data selection and sequencing settings for the application. Version may be named using any combination of alpha and numeric characters. Versions that begin with 'XIDE' or 'ZDE' are set by JD Edwards.</p>
Appl Override	<p>A code used to designate the reporting system number for entering specific text or "jargon". See User Defined Codes, system code '98', record type 'SY' for a list of valid values.</p>

Field	Explanation
Run Time Msg	Any run time message can be defined in the Data Dictionary. These messages serve as precautions to prevent the inadvertent execution of a job. Further, they can be used to draw correlations between one job and another. For example, a run time message might advise you of an excessively long run time, a particularly bulky report, or a prerequisite step to executing a job (for example, you must build the data cross reference file before you can do a Data Cross Reference Inquiry). An example of a run time message is "MENUMSG001", which has been defined in the Data Dictionary.
Cntry/Reg	The Menu Country/Region Codes field contains the region code (3 bytes) for all 24 menu selections for each menu record. This region code is used to mask those international selections that are country specific; i.e. 1099 processing in the US and VAT tax processing in Europe.

## What You Should Know About

Job to Execute field	Description
<b>Job to Execute field</b>	<ul style="list-style-type: none"> <li>JD Edwards World Jobs: All JD Edwards World jobs are CL programs that call an RPG program. CL programs begin with a J and are followed by the identifying ID of the program. For example, to call the Address Book Revisions P01051, enter J01051 in the Job to Execute field.</li> <li>RPG Jobs — Enter an RPG job if it is your custom program.</li> <li>IBM Menus — All IBM menu IDs must be preceded by the ampersand (&amp;) sign. Example: To call the IBM Support Menu, enter &amp;SUPPORT in the Job to Execute field.</li> <li>Blank — If the Job to Execute field is left blank and you enter a description, it is considered a heading. When the menu displays, the description is highlighted and preceded by three periods.</li> </ul>

## Shortcuts and Procedures with Menu Selections

You can perform several actions when working with menu selections:

- Advance to the appropriate menu selection
- Add/change/delete selection information
- Locate a Job ID for a menu or menu selection
- Copy a selection to another menu

- Rearrange selections
- Highlight a selection
- Delete a selection

## Swapping Selections

### To swap two selections

When swapping, always begin with the lowest menu option.

1. On Revisions, advance to the first option you wish to swap.
2. Key the selection number of the option you wish to swap with.
3. Perform a change.

## Deleting Selections

There are two ways to delete an individual menu selection. Complete the following tasks:

- Delete selections using Method 1
- Delete selections using Method 2

You can choose Menu Search (F9) to perform a menu search.

### To delete selections using Method 1

1. On Revisions, advance to the selection you want to delete.
2. Blank out each item in the selection information.
3. Perform a change.

### To delete selections using Method 2

1. On Revisions, advance to the selection you want to delete.
2. Enter two asterisks (\*\*) in the Selection field of the option you want to delete.
3. Perform a change.

## Translating Selections

You can translate any selections you need to. The system stores the translations individually in the Menu Selection Text (F0083) file.

### To translate selections

1. On Revisions, choose Menu Translation (F15).



2. If Menu Text Translation is not displaying the menu you want to translate, inquire on the menu ID that you want.
3. Enter the language value in the Language field.
4. If applicable, enter a title in the Title field.
5. Enter the translated descriptions in the Translated Description fields for each selection you want to translate.
6. Choose Other Selections (F5) to display the other twelve selections on the menu you are translating.
7. Click Add.
8. When you have finished translating the selections, choose Exit (F3) to return to Revisions.

## Adding a New Menu

Avoid creating menus from scratch. It is much more efficient to copy an existing menu.

### To add a new menu

1. On Revisions, enter information into the following fields:
  - Display Level
  - Menu Class
  - Menu ID
  - Title
  - System Code

2. If you want your menu to have selections, complete the selection information.
3. Click Add.

## Deleting the Entire Menu

### To delete the entire menu

1. On Revisions, locate the menu you want to delete.
2. Choose Delete.

There is no confirmation on a delete.

---

# Work with Miscellaneous Menu Utilities

## Working with Miscellaneous Menu Utilities



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **Menus**  
From Menus (G901), choose **Revisions**

This section contains the following:

- [Defining DREAM Writer Selections](#)
- [Defining the Role of DREAM Writer Processing Options \(F18\)](#)
- [Locating a Job ID](#)
- [Adding an IBM Command on a Menu](#)
- [Submitting an IBM Query from a JD Edwards World Menu](#)
- [Reviewing the Global Menu Update Utility](#)
- [Enabling the Menu Word Search function on double-byte machines](#)

## Defining DREAM Writer Selections

### What is a Blind DREAM Writer Version?

A blind DREAM Writer version is a menu selection that submits a specific report or version with no user input. Processing Options can appear for user input on a blind DREAM Writer version.

- Option Key specifies the Form ID to call
- Version specifies which version you call

For blind DREAM Writer Submissions:

- The Batch field must be 1.
- The Option Code field must be 2.
- You must have an active version in the Version field.
- On the Additional Parameters screen, the Mandatory Processing Option field must be N.

## Revisions Bypasses the Versions List for a Blind DREAM Writer

For example, the program ID for A/P to G/L Offset links directly to the Processing Options for user input and bypasses the Versions List screen, as it is a blind DREAM Writer.

**00908 Revisions**

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Skip To Selection  
Update with Redisplay  
Browse Other Menu(s)  
Repository Services  
Menu Search  
Global Menu File Update  
Menu Translation  
Menu Synonyms  
Single Byte Desc (Double Byte)  
Menu Security Review  
Clear Screen

00908  
Action Code: 1  
Menu Title: Periodic Processes  
Advanced/Tech: 00431  
Menu Class: 1  
Menu Id: 00421  
Setup Menu: 00441  
System Code: 04  
Lock: A J K DP F  
Level of Display: 2

Selection: 04  
Job to Execute: 7047001  
Menu to Execute:  
Option Code: 2  
Appl. Override: 04  
Description: A/P to G/L by Offset Account  
Batch: 1  
Highlight: 0  
Help Inst Key: P047001  
Option Key: P047001  
Run Time Msg:  
Sel Lock: A J K DP F  
Version: 230E0001  
Entry/Reg:

1. A/P INTEGRITY REPORTS
2. A/P Orig Doc to G/L by Batch
3. A/P Payments to G/L by Batch
4. A/P to G/L by Offset Account
5. A/P Payment Header to Detail
- 6.
- 7.
8. "RS OF" Reporting
9. Date File Generation
10. Open A/P Detail Reports
11. Open A/P Summary Reports
- 12.
13. MULTI-CURRENCY PROCESSING
14. Unrealized Gains & Losses
- 15.
- 16.
- 17.
- 18.
- 19.
- 20.
- 21.
- 22.
- 23.
- 24.

F4=Skip To F5=Updt w/Redisplay F6=Browse F10=Security Review F9=Search

**98312 A/P to G/L by Offset Account**

Field Sensitive Help  
Display Error Message  
Display Functions  
Return to Versions List  
Exit to Printer Overrides  
Return to Version Identification

98312  
A/P to G/L by Offset Account  
Form ID: P047001  
Version: 230E0001  
Display Level:

This job has various options described below. Enter the desired values and press ENTER to continue.

PRINT OPTIONS:

1. Enter a '1' to print only accounts that are out-of-balance. If left blank, all accounts will print.
2. Enter a '1' to print detail A/P Voucher and Payment data for any account that is out-of-balance. Enter a '2' to print detail for all accounts. If left blank, no detail will print.
- 2a. Enter a '1' to only print detail where the calculated gross is NOT equal to the ledger open amount. If left blank, all detail will print.

F5=Printer Overrides

## Defining the Role of DREAM Writer Processing Options (F18)

### Determining What DREAM Writer Processing Options (F18) Displays

You can determine what DREAM Writer Processing Options (F18) displays with each DREAM Writer job and what occurs when a selection is entered. On menus, set selections to display their processing options using DREAM Writer Processing Options (F18).

### How to Set Up Interactive DREAM Writer Jobs Using DREAM Writer Processing Options (F18)

In addition to specifying the Form ID in the Option Key field, use the Option Cntrl and Version fields to set up a selection as a DREAM Writer interactive job. Option Control 1 requires that you specify a version and Option control 2 does not require that you specify a version. The following shows the two ways of defining an interactive job:

Option Cntrl	Result of Selection	Result of F18
1	Execute job	Options
2	Execute job	DW List

### How to Set Up Batch Jobs Using DREAM Writer Processing Options (F18)

In addition to specifying the Form ID in the Option Key field, use the Option Cntrl, Batch, and Version fields on the Revisions screen to set up a selection as a DREAM Writer batch job.

These three fields work together with the Mandatory Processing Option field on the Additional Parameters (983011) screen of DREAM Writer to define the job.

Mandatory Option	Batch	Option Cntrl	Version	Result of Selection	Result of F18
1	1	2	Version #	Processing options then submit	DW List
0	1	2	Version #	Submit	DW List
1	1	1	Version #	Processing options then submit	Processing options
0	1	1	Version #	Submit	Processing options
1	0	2	blank	DW List	DW List
0	0	2	blank	DW List	DW List

---

**Note:** You can secure DREAM Writer Processing Options (F18) by setting up function key security for V00MENU, field #F03.

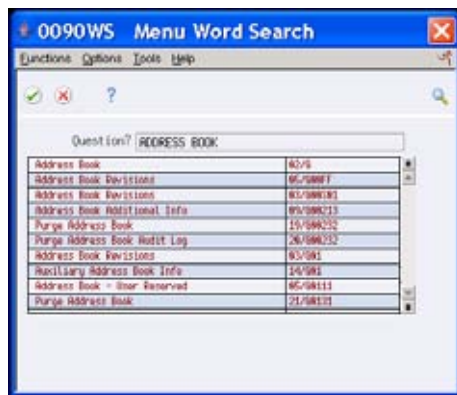
---

## Locating a Job ID

Use Menu Word Search to locate the job ID for a menu selection.

### To locate a job ID

1. On Revisions, choose Menu Word Search (F9). The Menu Word Search screen displays.



2. In the Question? field, enter the menu name or selection description. A list of menus and menu selections that meet the search criteria displays.
3. Choose (Option 6) the menu or menu selection for the Job ID you want to know. A second screen displays showing the menu specifications.
4. Click Exit (F3) to exit this screen.

## Adding an IBM Command on a Menu

### To add an IBM command on JD Edwards World menu selection

1. On Revisions, enter a description.
2. Set the execute job to J00CMD.
3. Enter 0 (zero) in the Batch field.
4. Enter 1 in the Option Code field.
5. Enter the IBM command you want to execute in the Option Key field.
6. Set Version to blank if you want to prompt the command (F4) or set Version to \*NOPROMPT if you want to execute the command without prompting.

## See Also

*About JD Edwards World Security* to verify or change menu security

## Submitting an IBM Query from a JD Edwards World Menu

You can create a CL to submit a query with and without prompting for selected records, and then add it to a JD Edwards World menu.

### To submit a query without prompting for selected records

1. On the Command Line, enter SVR.
2. On Software Versions Repository, enter J98MODEL1 in the following field:
  - Member ID

3. Copy J98MODEL1 using a similar object name. For example, you might enter JQUERY1.
4. Change the Product Code and Reporting System fields to a number between 55 and 60.
5. Ensure you change the Base Member Name. For example, change the Base Member Name to PQUERY1.
6. Edit the CL program as shown in the following example:

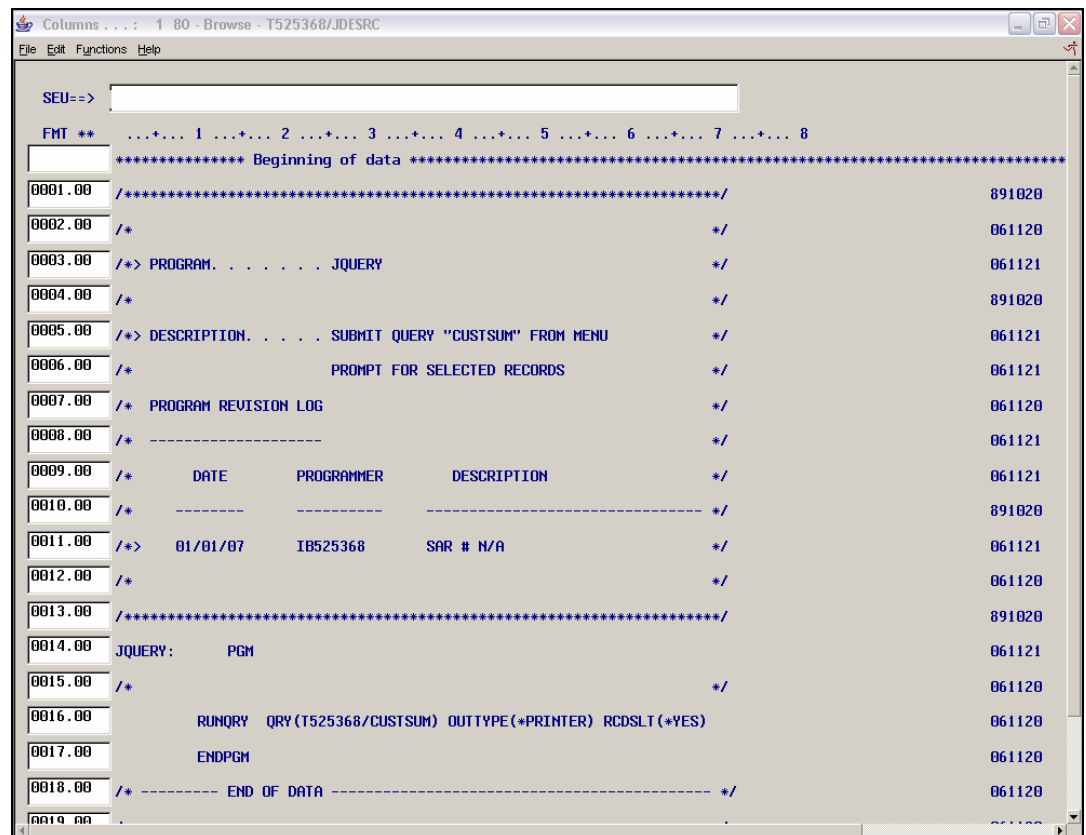


7. On Software Versions Repository, create the new object ensuring that the system places it in a custom object library in your library list.
8. Access Revisions and locate the new menu.
9. Using the change action, page down to locate an available selection and add the CLP as shown in the following example:



## To submit a query and prompt for selected records

1. On the Command Line, enter SVR.
2. On Software Versions Repository, enter J98MODEL1 in the following field:
  - Member ID
3. Copy J98MODEL1 using a similar object name. For example, you might enter JQUERY.
4. Change the Product Code and Reporting System to a number between 55 and 60.
5. Ensure you change the Base Member Name. For example, change the Base Member Name to PQUERY.
6. Edit the CL program as shown in the following example:



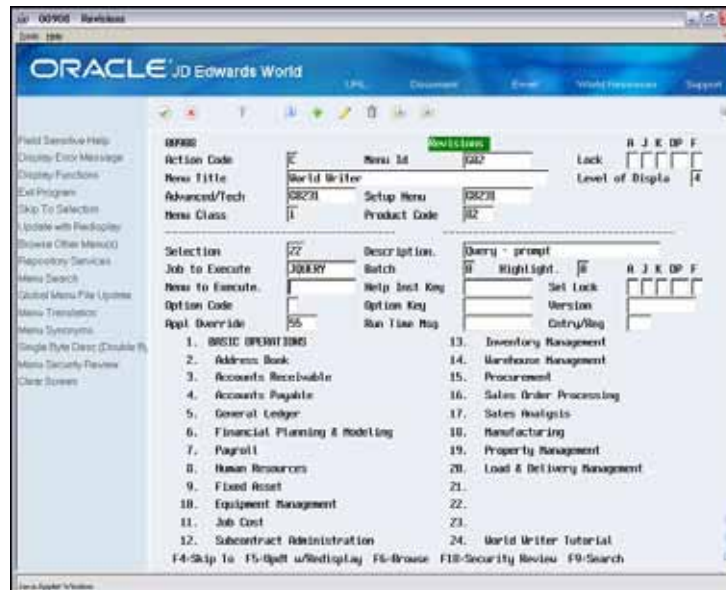
```

Columns...: 1 80 - Browse - T525368/JDESRC
File Edit Functions Help

SEU==>

FMT ** ...+... 1 ...+... 2 ...+... 3 ...+... 4 ...+... 5 ...+... 6 ...+... 7 ...+... 8
***** Beginning of data *****
0001.00 /*****/ 891020
0002.00 /* */ 061120
0003.00 /*> PROGRAM. . . . . JQUERY */ 061121
0004.00 /* */ 891020
0005.00 /*> DESCRIPTION. . . . . SUBMIT QUERY "CUSTSUM" FROM MENU */ 061121
0006.00 /* PROMPT FOR SELECTED RECORDS */ 061121
0007.00 /* PROGRAM REVISION LOG */ 061120
0008.00 /* ----- */ 061121
0009.00 /* DATE PROGRAMMER DESCRIPTION */ 061121
0010.00 /* ----- */ 891020
0011.00 /*> 01/01/07 IB525368 SAR # N/A */ 061121
0012.00 /* */ 061120
0013.00 /*****/ 891020
0014.00 JQUERY: PGM 061121
0015.00 /* */ 061120
0016.00 RUNQRY QRY(T525368/CUSTSUM) OUTTYPE(*PRINTER) RCDSLT(*YES) 061120
0017.00 ENDPGM 061120
0018.00 /* ----- END OF DATA ----- */ 061120
0019.00 .
  
```

7. On Software Versions Repository, create the new object ensuring that the system places it in a custom object library in your library list.
8. Access Revisions and locate the new menu.
9. Using the change action, page down to locate an available selection and add the CLP as follows:



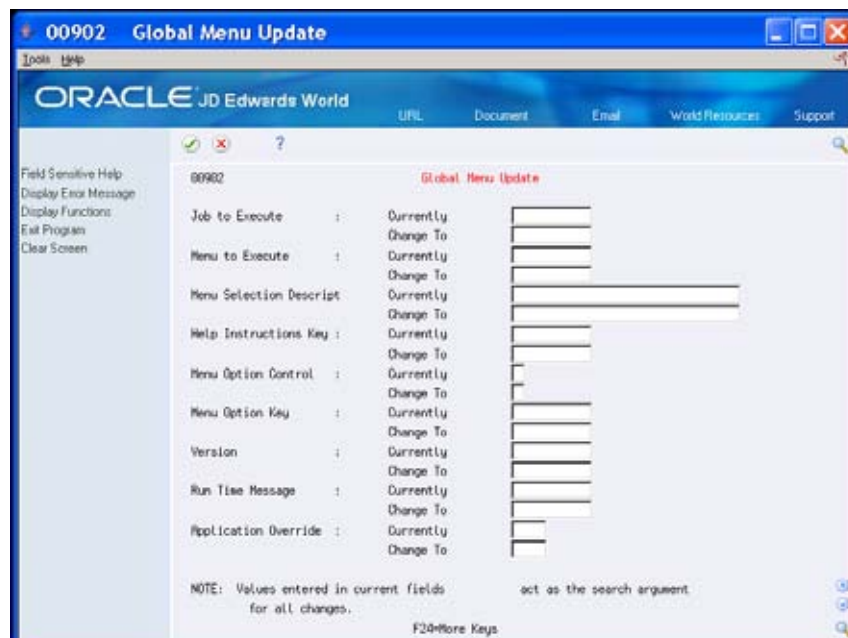
## Reviewing the Global Menu Update Utility

This utility is useful when replacing obsolete programs, versions, or messages. This reads every record in the file. There is no Boolean logic. This is an interactive job that reads the menu files (F0082, F00821, F0083).

### To review the global menu update utility

On Revisions, choose Global Menu File Update (F11) to display this utility.

If there is a value in the Currently field, the utility updates each record with the value in the Change To field.



## Enabling the Menu Word Search function on double-byte machines

To enable the Menu Word Search function on double-byte machines, you must enter single-byte menu titles and selection descriptions for menus you create or change.

### To enable the Menu Word Search function on double-byte machines

1. On Revisions, choose Single Byte Desc. (F17) to access the Single Byte Menu Revisions screen.

2. Locate an existing menu.
3. Complete the following fields:
  - Title (SBCS)
  - SBCS
4. To display additional menu selections, choose Other Selections (F5).
5. After you enter single-byte menu text, run the Menu Word Search program from the Rebuilds & Global Updates (G9642) menu.

Field	Explanation
Title (SBCS)	A text description of the menu.
SBCS	The Menu Selection Description field provides a 30-character description of each item on a menu. These descriptions should be descriptive of the function of the selection. These descriptions may be altered for a particular type of organization to provide more industry specific association.



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## **11 Additional Menu Design Tools**



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# Overview to Additional Menu Design Tools

## Objectives

- To understand the additional menu tools
- To understand the Hidden Selection design tools
- To understand setting up menus with jobs

## About Additional Menu Design Tools

Here we detail the additional menu design tools. Use these tools to:

- Maintain a running audit of a user's menu choices
- Copy menus from one library into another
- Add terms to the Menu and Word Search facility
- Display each menu that is called from a parent menu
- Rebuild the Menu Structure file (F9850)
- Modify Hidden Selections
- Submit several jobs to the job queue through one selection

Complete the following tasks:

- Review Additional Tools on Menus (G901)
- Review Hidden Selection Tools
- Set up job stream submissions
- Set up interactive and batch jobs





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# Review Additional Tools on Menus (G901)

## Reviewing Additional Tools on Menus (G901)



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **Menus**

You can use the Menus menu (G901) for additional tools that you can use to design and create your menus.

This section contains the following:

- [Reviewing the Selection History Log](#)
- [Reviewing the Copy / Move Tool](#)
- [Reviewing the Synonyms Tool](#)
- [Reviewing the Menu Structure Inquiry Tool](#)
- [Reviewing the Displaying Level Functions](#)

## Reviewing the Selection History Log

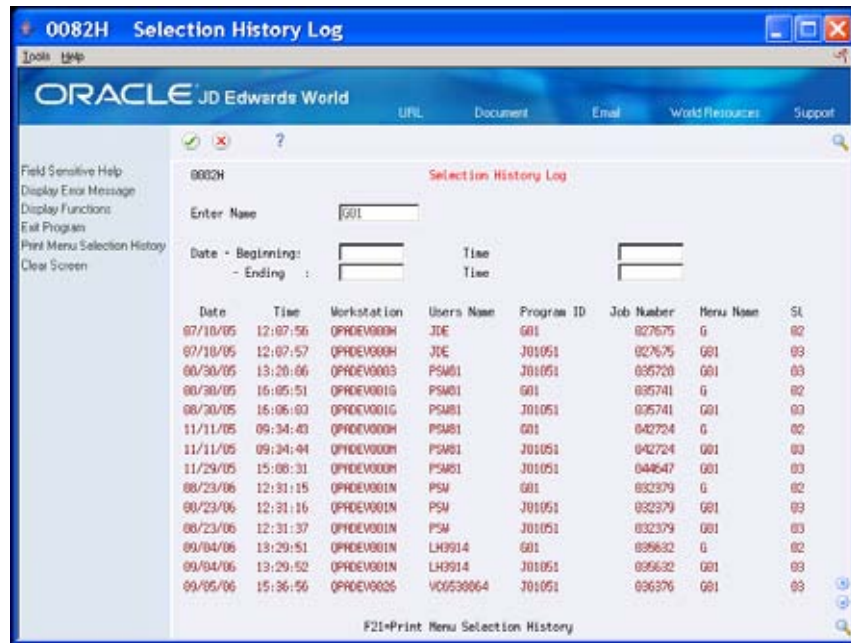


From Menus (G901), choose **Selection History Log**

The Selection History Log is an online inquiry into a history log of menu activity within JD Edwards World software. The system automatically logs each user's activity if the Selection History Log (F0082H) file exists.

### To locate the Selection History Log

1. On Selection History Log, enter a user ID, workstation, program, or menu ID.




2. Optionally, enter a beginning and ending date in the DDMMYY format.
3. Optionally, enter a beginning and ending time.

You should periodically save and clear the Selection History Log (F0082H), or delete the log file if you don't want to use it. If you use the history file you must maintain it yourself. There is no automatic clearing of this file, so you need to periodically clear it or save it to conserve disk space.

Field	Explanation
Date-Beginning	The beginning date in the date range. This is the date starting with which you want the system to display information.
Date-Ending	This identifies an ending date after which you do not want to include information.
Time - Beginning (HH/MM/SS)	The computer clock in hours:minutes:seconds.
Time - Ending (HH/MM/SS)	The computer clock in hours:minutes:seconds.

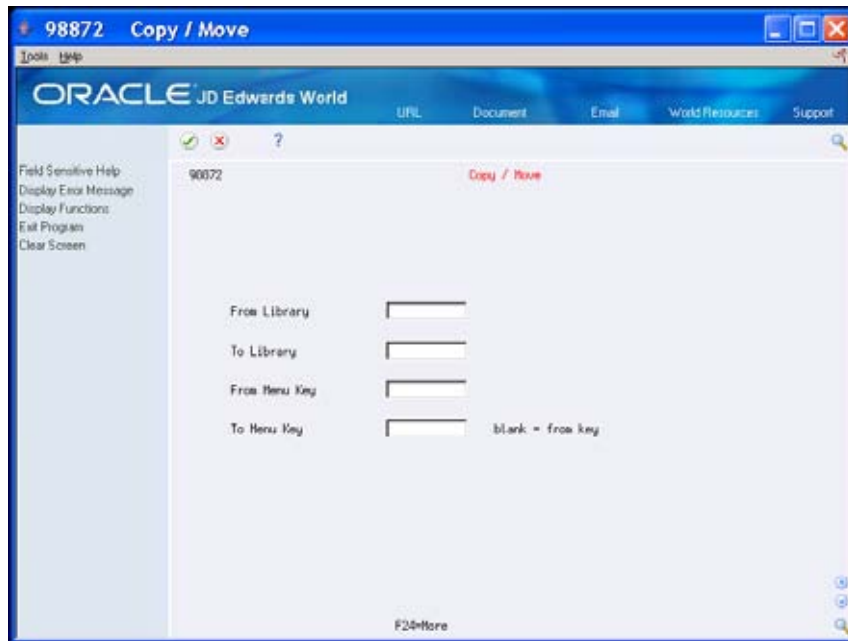
## Reviewing the Copy / Move Tool

	From Menus (G901), choose Copy/Move
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This utility copies a specific menu from one library to another. Use this to copy menus that have inadvertently been deleted. If the menu already exists in the To

library, this copy replaces it with the menu in the From library. If the library names are the same, the system renames the From menu to the To menu. Copy menus from JDFDATA.

If the menu exists in an alternate language, use the Language field to specify which version of the menu to copy.



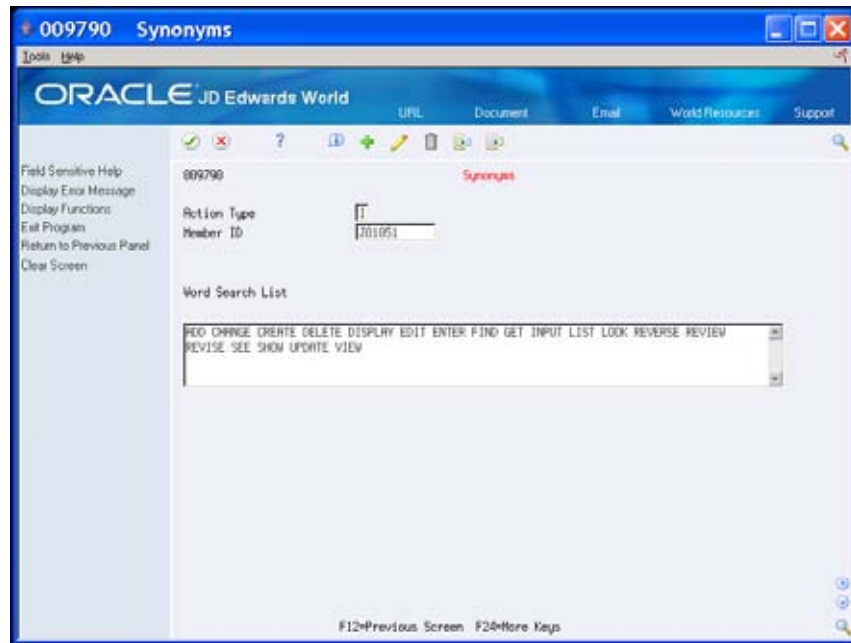
## Reviewing the Synonyms Tool



From Menus (G901), choose **Synonyms**

The Synonyms program is a tool that JD Edwards World utilizes to update verbs for the Menu Word Search program. JD Edwards World has included in the software a default list of verbs that a user can search online to find a JD Edwards World menu selection.

The system keys the synonyms file on the CL program.



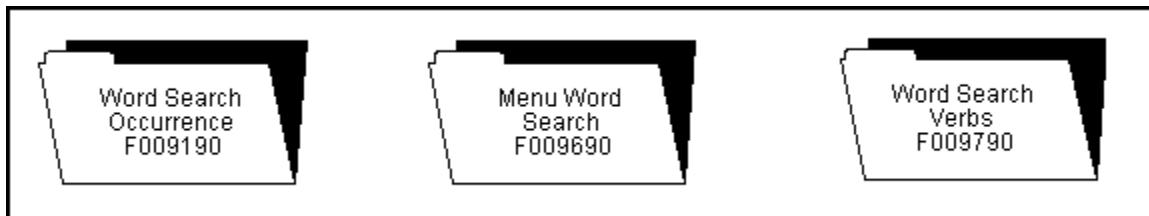
When you add a new menu option, using a custom CL program, the system does not place a record in the menu synonym file. Run the rebuild to create a record within Synonyms.

You can change any member ID's list of verbs to reference your business environment needs.

## What Are the Files for Menu Word Search?

The files for Menu Word Search are:

- Word Search Occurrence (F009190)
- Menu Word Search (F009690)
- Word Search Verbs (F009790)



## When to Rebuild the Menu Word Search Program

Anytime you change the Synonyms, User Defined Code 96/VB, or the Menu Files (F00821, F0083), you must rebuild the Menu Word Search Program.

Access the Rebuilds & Global Updates menu (G9642). To rebuild the synonyms, select Rebuild Menu Word Search.

**Caution:** Do not run this job when users are on the system. When this job begins, the system clears the Menu Word Search files. No one can access Menu Word Search until the system completes the rebuild. It can take several hours.



## Reviewing the Menu Structure Inquiry Tool

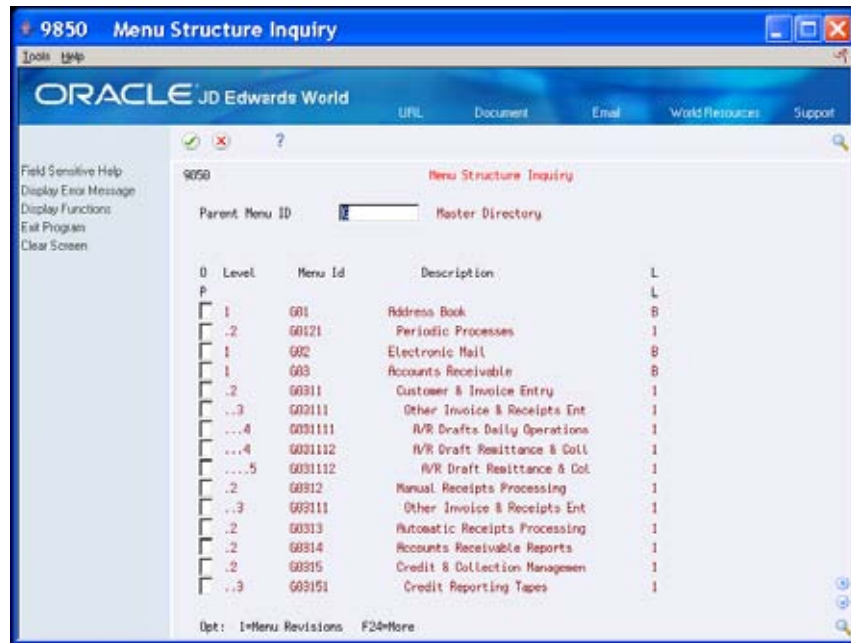


From Menus (G901), choose Menu Structure Inquiry

On Menu Structure Inquiry, the system displays each menu the parent menu calls, as well as the menu description and level of detail.

### To review the Menu Structure Inquiry tool

On Menu Structure Inquiry, rebuild the Menu Structure file after you add new menus or after a reinstallation.



Field	Explanation
Parent Menu ID	The parent menu ID usually has the same first few characters as the children menu ID. See data item MNI for details. For example, Parent Menu G09 has children menus G0923 and G0924.

## Reviewing the Displaying Level Functions

You use Display Level as an organizational feature for menus and as a security feature for masking DREAM Writer processing options. These are independent features and do not work together. For more information about the Display Level use in DREAM Writer processing options, see *Set Up Report Version Security for DREAM Writer*.

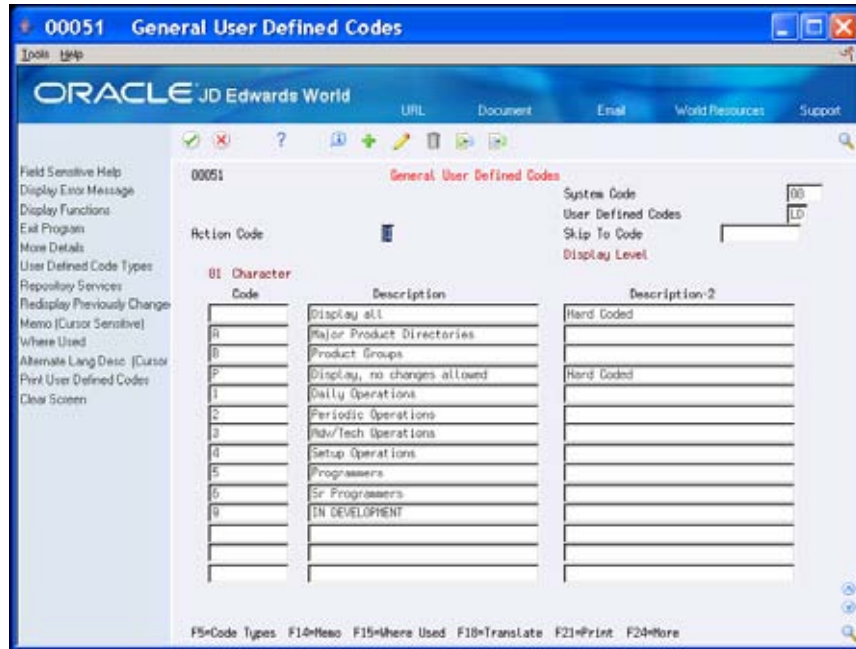
### Locating Display Level

You can find the Display Level field in several places. The most common places are:

- Revisions screen – from the Menus menu (G901), choose Revisions
- User Information screen – from the Security Office menu (G94), choose User Information or from the Library List Control menu (G944), choose User Information Revisions
- DREAM Writer Processing Options Setup screen - from the Library List Control menu (G81), choose Processing Options Setup
- Index of Menus screen – press F16 on any menu

## Standard Display Levels

Standard display levels are setup in User Defined Code (UDC) table 00/LD. Nine (9) is the highest level and 'blank' is the lowest level.



You can add additional custom display levels to this UDC table.

## Menu Organization

You can organize menus by level of user experience.

This organization is not a security feature, it is only informational.

### Examples

- If the display level in the JD Edwards World user profile is blank:  
Each menu displays text in the upper left corner that corresponds to the display level with which it is set up. If the menus are set up as 5 – Programmers, the text in the upper left corner displays as PROGRAMMERS. This denotes that the options on the menu might be higher level functions that end users do not need, but programmers and administrators use frequently.
- If the display level in the JD Edwards World user profile is lower than the display level set up for menus: User ID DL = 2 and Menu DL = 5.  
All menus with display levels higher than 2 display text in the upper left corner of the menu corresponding to the display level set in menu revisions.
- If the display level in the JD Edwards World user profile is higher than the display level set up for menus: User ID DL = 6 and Menu DL = 5.  
Any menu with display levels equal to or lower than 6 do not have text in the upper left corner. The highest level is 9 - In Development. If the user ID display


level is set at 9, no text appears in the upper left corner of any JD Edwards World menu.



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# Review Hidden Selection Tools

## Reviewing Hidden Selection Tools

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Run Time Setup</b> From Run Time Setup (G90), choose <b>Menus</b> From Menus (G901), choose <b>Revisions</b>
---	---

You can define and add your own Hidden Selections to execute a job or go to a menu. Hidden Selections must be a number from 25 to 99. Remember that JD Edwards World has preset Hidden Selections 25, 27, 29, and 97.

When you add or change a Hidden Selection, sign off and back onto the system to load the new Hidden Selections.

This section contains the following:

- [Locating the Hidden Selection Menus](#)
- [Adding Hidden Selections](#)
- [Troubleshooting Hidden Selection 60 \(Break Message\)](#)

## What are the ZHIDDEN User Tools?

The ZHIDDEN user tools are:

- Selection 33, display submitted jobs
- Selection 34, display user messages
- Selection 39, change user print queue
- Selection 42, display user job queue
- Selection 43, display user print queue
- Selection 50, calendar
- Selection 82, hold submitted jobs
- Selection 88, change your password
- Selection 85, display user defaults
- Selection 90, sign off

## What are the ZHIDDEN002 Operator Tools?

The ZHIDDEN002 operator tools are:

- Selection 27, advanced operations
- Selection 29, technical operations
- Selection 30, EOJ without sign off
- Selection 41, system operator messages
- Selection 44, display active jobs
- Selection 45, display print writer
- Selection 84, IBM queue and a data base
- Selection 97, install history display
- Selection 98, secondary job

## What are the ZHIDDEN003 Programmer Tools?

The ZHIDDEN003 programmer tools are:

- Selection 25, menu specifications
- Selection 35, global menu travel
- Selection 36, command entry screen
- Selection 38, display library list
- Selection 40, file field description
- Selection 46, display compile queue
- Selection 60, break message window
- Selection 99, display file overrides

Complete the following tasks:

- Locate the Hidden Selection menus
- Add Hidden Selections

## Locating the Hidden Selection Menus

To locate the Hidden Selections Menus

1. On Revisions, enter one of the hidden selection IDs, such as ZHIDDEN, in the Menu Id field.
2. Click Inquire.

## Adding Hidden Selections

Complete the following tasks:

- Add Hidden Selections that call a job
- Add Hidden Selections that call a menu

## To add Hidden Selections that calls a job

- On the Revisions screen, complete the following field:
  - Description  
A Hidden Selection description ends in '- Sel xx', where 'xx' is the Hidden Selection number, which you enter at the end of the Description field.
- Enter SELECTxx, where xx is the Hidden Selection number, in the Job to Execute field.
- Enter 1 in the Option Code field.
- Enter the name of the CL program in the Option Key field.

- Click Change.

## To add Hidden Selections that calls a menu

- On Revisions, describe the Hidden Selection.  
A Hidden Selection description ends in '- Sel xx', where 'xx' is the Hidden Selection number, which you position at the end of the Description field.

2. Enter SELECTxx, where xx is the Hidden Selection number, in the Job to Execute field.
3. Enter 2 in the Option Code field.
4. Enter the menu ID in the Option Key field.
5. Click Change.

---

**Note:** Use any open selections in the range of 1 through 12, then 13 to 24.

---

To use the new hidden selection, sign off and sign on to the system. The system loads hidden selections at signon.

### To add Hidden Selections to a menu

1. On Revisions, enter ZHIDDEN, ZHIDDEN002, or ZHIDDEN003 in the following field.
  - Menu ID
2. Locate a hidden selection.
3. For that hidden selection, note the information in the following fields:
  - Batch
  - Option Code
  - Option Key
  - Version (if applicable)

**00908 Revisions**

Oracle JD Edwards World

Menu Id: 00908  
Menu Title: Hidden Selection Masks  
Advanced/Tech: [Blank]  
Menu Class: 1  
System Code: 90

Selection: 09  
Job to Execute: SELECT50  
Menu to Execute: [Blank]  
Option Code: 1  
Appl Override: [Blank]

Description: Calendar  
Batch: 0  
Help Init Key: [Blank]  
Option Key: 000001  
Run Time Msg: [Blank]

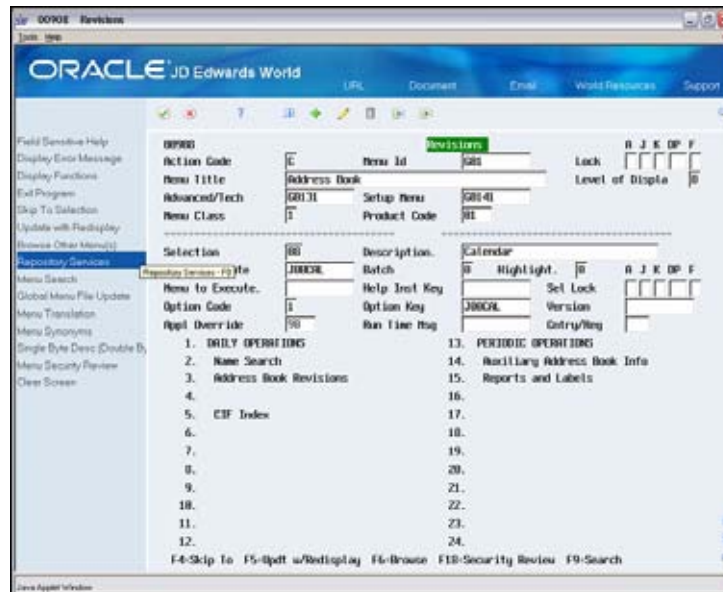
Calendar - Sel 50  
Highlight: 0  
Sel Lock: [Blank]  
Version: [Blank]  
Entry/Reg: [Blank]

1. User Tools  
2. Display Submitted Jobs - Sel 33  
3. Display User Messages - Sel 34  
4. Display User Job 0 - Sel 42  
5. Display User Print 0 - Sel 43  
6. Change User Print 0 - Sel 39  
7. Change Your Password - Sel 00  
8. Hold Submitted Jobs - Sel 02  
9. Calendar - Sel 50  
10. Display User Defaults - Sel 86  
11. Sign Off - Sel 90  
12. None

13.  
14.  
15.  
16.  
17.  
18.  
19.  
20.  
21.  
22.  
23.  
24.

F4=Skip To F5=Updt u/Redisplay F6=Browse F10=Security Review F9=Search

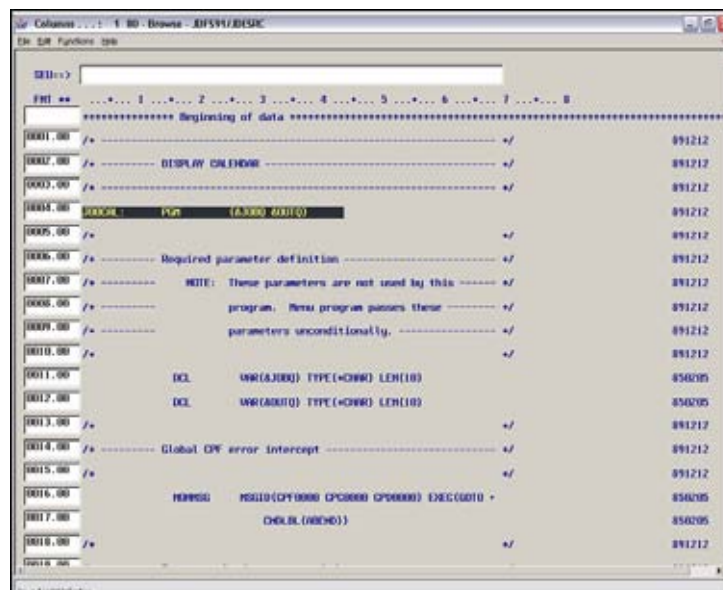
4. Locate the menu to which you want to add hidden selections and a blank Selection field.
5. Enter the data you noted from the hidden selection in the previous step in following fields and click Enter:
  - Job to execute  
Enter the same value you enter in the Option Key field.
  - Description
  - Batch
  - Option Code
  - Option Key
  - Version



**Note:** Some hidden selections have no Option Key and you cannot add these to a menu.

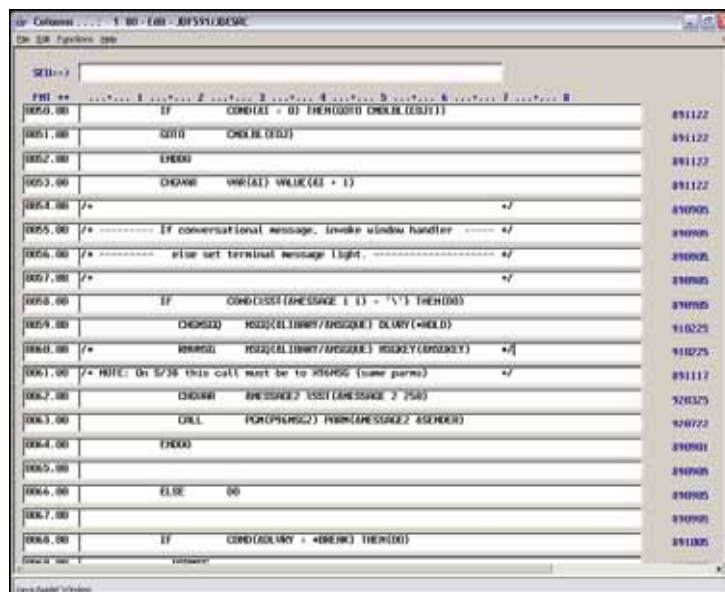
#### 6. Access the menu and test the hidden selection.

**Note:** JD Edwards World recommends that you browse the CL source prior to making changes and read the note in CL. As most hidden selection jobs receive two parameters, the program in the Job to Execute field must accept two parameters. The system issues the following error message if you customize your source without two parameters: ERROR: 'Cannot resolve to object SELECTxx. Type and Subtype X'0201' Authority X'0000.'



## Troubleshooting Hidden Selection 60 (Break Message)

Issue	Solution
Hidden Selection 60 Break Message Window does not display a Send Window Message window (V96MSG) at the message recipient's workstation	<p>This might occur when a user is not signed on. However, the workstation's message wait (MW) indicator is active.</p> <p>If the MW indicator does not appear on the Library List Control menu (G944), choose Pre-open Files Setup. Locate User Type *SYS. Ensure that it contains file J96MSGQ and it contains the description: Message Handling - Set Message Queue Win. If the file does not exist, add file J96MSGQ. Locate User Type: *SYS again to ensure that the change took place. As this is a pre-open file you must sign off and then sign on for the change to take effect.</p> <p>Note: If your IBM security level is set to 40, then the MW indicator does not activate due to restrictions of this security level:</p>
Retain Hidden Selection 60 messages in MSGQ	<p>To retain Hidden Selection 60 messages, you can modify the J96MSG program. On the Edit screen, remove the statement RMVMSG MSGQ(&amp;LIBRARY/&amp;MSGQUE) MSGKEY(&amp;MSGKEY) as shown below. Rename the existing object and recompile member J96MSG. This allows the user to utilize the IBM command DSPMSG to display all user messages that have not yet been deleted.</p>







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# Set Up Job Stream Submissions

This section contains the following:

- [Setting Up Job Stream Submissions](#)
- [Setting Up Interactive and Batch Jobs](#)



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **Menus**  
From Menus (G901), choose **Revisions**

## Setting Up Job Stream Submissions

JD Edwards World has set up a special job (J81900) that allows you to submit several jobs to the job queue or mix interactive and batch jobs together with a single selection from a menu. You can utilize this feature for:

- Setting up batch jobs that are run monthly
- Setting up interactive jobs to enter in some type of order

### To set up a job stream

1. On Revisions, create a “% menu” that has each of the jobs you want submitted entered as a selection.
2. Add the % menu to another JD Edwards World menu as a selection on that menu.

### To create a batch % menu

1. On Revisions, enter each job you want to submit as a selection. The jobs submit in the order in which they appear on the % menu.

For example, you can set up a menu called %MONTHEND. The % sign is the key to Job Stream Submission.

Field: 00900 Revisions

Menu Id: MONTHEND

Menu Title: Monthend Reports Job Stream Menu

Advanced/Tech: 1

Menu Class: 3

Product Code: 55

Selection: 01

Job to Execute: J04700

Batch: 1

Help Inst Key: P04700

Option Code: 2

Option Key: P04700

Run Time Key:

Version: 2200000

1. A/P Orig Doc to G/L by Batch

2. Date File Generation

3. Open A/P Detail Reports

4. Open A/P Summary Reports

5. Unrealized Gains & Losses

6. A/R to G/L by Batch

7. A/R to G/L by Offset Account

8.

9.

10.

11.

12.

13.

14.

15.

16.

17.

18.

19.

20.

21.

22.

23.

24.

F4-Skip To F5-Updt w/Redisplay F6-Browse F10-Security Review F9-Search

2. Enter the name of the desired batch job (a CL) in the Job to Execute field.
3. Enter 1 in the Batch field.
4. Enter 2 in the Option Code field.
5. Enter the DREAM Writer screen ID in the Option Key field.
6. Enter the versions number you want to execute in the Version field — you must have a version.

## To add the % menu to another menu

1. On Revisions, add the Job Stream Submission program (J81900) and the % menu to an existing menu or create a new menu.

Field: 00900 Revisions

Menu Id: 0250042

Menu Title: Periodic Processes

Advanced/Tech: 1

Menu Class: 1

Product Code: 55

Selection: 24

Job to Execute: J81900

Batch: 1

Help Inst Key: MONTHEND

Option Code: 2

Option Key: MONTHEND

Run Time Key:

Version: 2200000

1. A/P INTEGRITY REPORTS

2. A/P Orig Doc to G/L by Batch

3. A/P Payments to G/L by Batch

4. A/P to G/L by Offset Account

5. A/P Payment Header to Detail

6.

7.

8. "RG OF" Reporting

9. Date File Generation

10. Open A/P Detail Reports

11. Open A/P Summary Reports

12.

13. MULTI-CURRENCY PROCESSING

14. Unrealized Gains & Losses

15.

16.

17.

18.

19.

20.

21.

22.

23.

24. Monthend Report Run

F4-Skip To F5-Updt w/Redisplay F6-Browse F10-Security Review F9-Search

2. Enter J81900 in the Job to Execute field.
3. Enter 1 in the Batch field.
4. Enter 2 in the Option Code field.
5. Enter the name of the % menu in the Option Key field.
6. Enter ZJDE0001 in the Version field. This submits the job to batch J819000001 and if one job fails, the rest still execute.

The following are important to setting up a job stream:

- %menu selections should be continuous. Do not leave blank selections.
- DREAM Writer jobs must have the Mandatory Options field set to N. This field is in DREAM Writer.
- If you want to process more than 24 reports, create another %menu and place that in selection 24 on your original %menu.
- To submit a job through unattended night operations (Sleeper):  
Program = J81900, Screen = % menu name, Version = ZJDE0001

## Setting Up Interactive and Batch Jobs

Complete the following tasks:

- Set up a percent menu with interactive and batch processing
- Add the percent menu to another menu
- Submit a percent menu and job stream in a custom CL program

### To set up a percent menu with interactive and batch processing

On Revisions, add menu selections that call both interactive and batch jobs. Use F6 to copy in all selections for the jobs.

For example, you can set up a menu called %USERS.

Field Services Help  
Display Error Message  
Display Functions  
Exit Program  
Skip To Selection  
Update with Redisplay  
Browse Other Menu(s)  
Repository Services  
Menu Search  
Global Menu File Update  
Menu Translation  
Menu Synonyms  
Single Byte Desc (Double B)  
Menu Security Review  
Clear Screen

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00908 Revisions

Action Code 00908 Menu Id 00908 Lock A J K DP F  
Menu Title Add a New User Job Stream Menu Level of Displa 0  
Advanced/Tech 3 Setup Menu  
Menu Class 3 Product Code 55

Selection 01 Description Address Book Revisions  
Job to Execute 010000 Batch 0 Highlight 0 A J K DP F  
Menu to Execute Help Inst Key 000001 Sel Lock  
Option Code 1 Option Key 000001 Version 2.00.0001  
Appl Override 01 Run Time Key Entry/Key

1. Address Book Revisions 13.  
2. User Information Revisions 14.  
3. Library List Revisions 15.  
4. User Signon List Revisions 16.  
5. Reports by Address 17.  
6. 18.  
7. 19.  
8. 20.  
9. 21.  
10. 22.  
11. 23.  
12. 24.

F4-Skip To F5-Updt w/Redisplay F6-Browse F10-Security Review F9-Search

To add the percent menu to another menu

1. On Revisions, add the Job Stream Submission program (J81900) and the % menu to an existing menu or create a new menu.

Field Services Help  
Display Error Message  
Display Functions  
Exit Program  
Skip To Selection  
Update with Redisplay  
Browse Other Menu(s)  
Repository Services  
Menu Search  
Global Menu File Update  
Menu Translation  
Menu Synonyms  
Single Byte Desc (Double B)  
Menu Security Review  
Clear Screen

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00908 Revisions

Action Code 00908 Menu Id 00908 Lock A J K DP F  
Menu Title Security Officer Level of Displa 4  
Advanced/Tech 3 Setup Menu  
Menu Class 3 Product Code 55

Selection 24 Description Add a New User  
Job to Execute J81900 Batch 0 Highlight 0 A J K DP F  
Menu to Execute Help Inst Key 000001 Sel Lock  
Option Code 2 Option Key 000001 Version \*INTERACT  
Appl Override 01 Run Time Key Entry/Key

1. USER SECURITY 13. TECHNICAL SECURITY  
2. User Information 14. JOE System Values  
3. Menu Locks 15. Change User Profile Ownership  
4. Action Code 16. Library List Control  
5. Business Unit 17. Software License Manager  
6. Name Search Type 18. Object List Overrides  
7. Batch Approval/Post 19. Database Audit Manager  
8. Report Version 20. Auditing and Reporting  
9. Review User 21.  
10. Function Keys 22.  
11. User Defined Codes 23.  
12. User License Types 24.

F4-Skip To F5-Updt w/Redisplay F6-Browse F10-Security Review F9-Search

2. Enter J81900 in the Job to Execute field.
3. Enter 0 in the Batch field.
4. Enter 2 in the Option Code field.
5. Enter the name of the % menu in the Option Key field.
6. Enter \*INTERACT in the Version field.

## To initiate a job stream by custom CLP

Use the following to set up a percent menu and then set up a custom CL program to call the percent menu.

1. On Revisions, enter the batch job in the Job to Execute field.
2. Enter 1 in the Batch field.
3. Enter 2 in the Option Code field.
4. Enter the DREAM Writer form ID or the WorldWriter Group ID in the Option Key field.
5. Enter the version in the Version field and press Enter.
6. Repeat the previous steps for each batch job you want to add to the percent menu.
7. Create a CL program which includes the following command:

```
SBMJOB CMD(CALL PGM(J81900) PARM('%MIKETST' 'ZJDE0001'))  
JOB(JOBSTREAM)
```

The first parameter is the name of the percent menu (%MIKETST) and the second parameter is the version (ZJDE0001). You can include a job name to use while the job processes, otherwise the system uses QDFTJOB.



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## 12 Data Dictionary Design





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# Overview to Data Dictionary Repository

## Objectives

- To understand how the Data Dictionary works
- To understand the Glossary
- To understand the Next Numbers facility
- To understand the field reference file rebuild

## About the Data Dictionary Repository

The Data Dictionary is the most powerful element in all of JD Edwards World software offerings. We define all data items used by JD Edwards World programs in the Data Dictionary. By requiring this up-front definition, the Data Dictionary enforces uniformity, consistency, and accuracy across all JD Edwards World applications.

The Data Dictionary represents a centralized glossary of:

- Field definitions
- Program error messages, both interactive and batch
- Menu messages
- Work fields
- User Defined Help instructions
- Program and field descriptions accessed by the Help facility

This section describes the following:

- Understand the Data Dictionary structure
- Locate a data item name
- Work with the data dictionary
- Work with the Next Numbers facility
- Review the field reference file rebuild



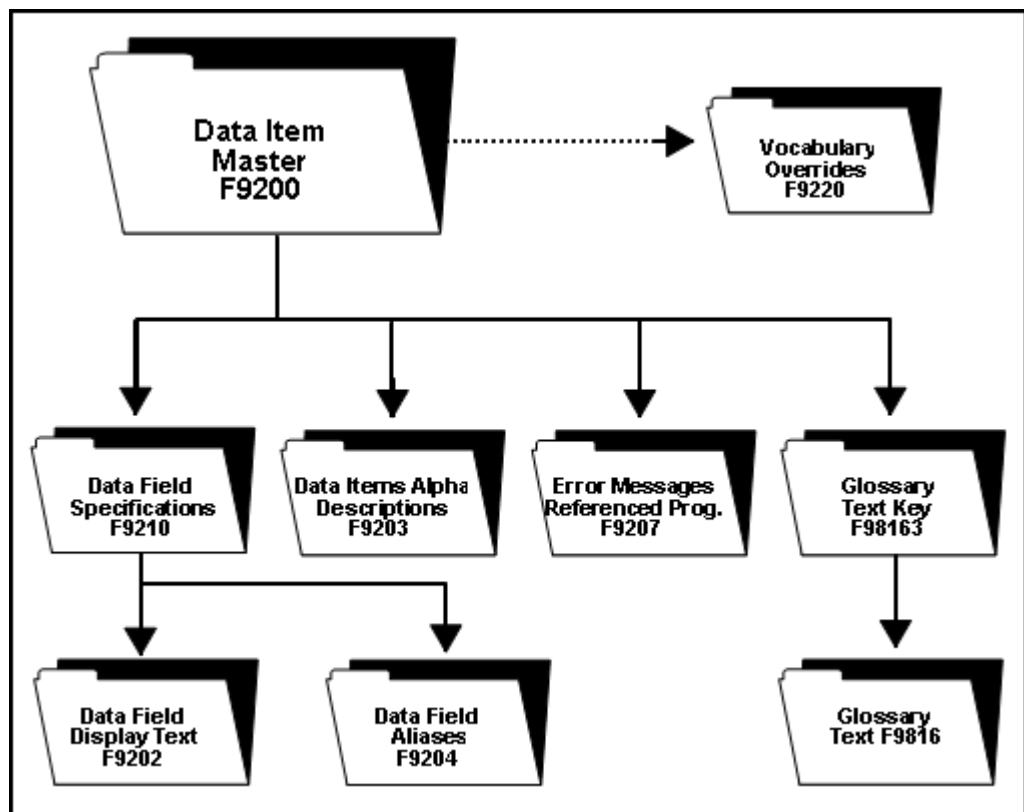
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# Understand the Data Dictionary Structure

## Understanding the Data Dictionary Structure

Eight separate files comprise the Data Dictionary Repository.

The following diagram illustrates the relationships between these files.



### Data Item Master (F9200)

This is the master file for the Data Dictionary. Every data item has a record in this file.

### Data Field Specifications (F9210)

This file contains database fields, which is a glossary group of “D” or “S,” work fields, glossary group “U,” and categories, glossary group “C.” This file contains the base display and validation rules for all file and data items. It also contains the “C” aliases.

### Data Field Display Text (F9202)

This file lets you define multiple row descriptions and column titles for each data item, based upon language, or reporting system, or both. You can add a language value for each language translation required for the row description and column title. The reporting system code allows the entry of jargon or company terminology.

### Data Item Alpha Descriptions (F9203)

This file contains the alpha and compressed descriptions for all data items. This allows you to perform a Data Dictionary search by description. You can also specify separate alpha descriptions by language preference and reporting system. Every data item has a record in this file.

### Data Item Aliases (F9204)

This file contains only database fields, which are in a glossary group of “D” or “S.” This file contains COBOL aliases for each data item.

### Error Message Program ID (F9207)

This file contains error messages that have a program, screen, or report ID attached to them. You exit to this program, screen, or report when you receive the error. For example, if you receive a user defined code error, you could exit to the User Defined Code Revisions program to modify a value.

### Glossary Text File (F9816)

This file contains the glossary text for every data item. Each line of text in the glossary is one record.

### Key Index File (F98163)

This file contains key information to link the data items to their glossary and to specific items.

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# Locate a Data Item Name

## Locating A Data Item Name

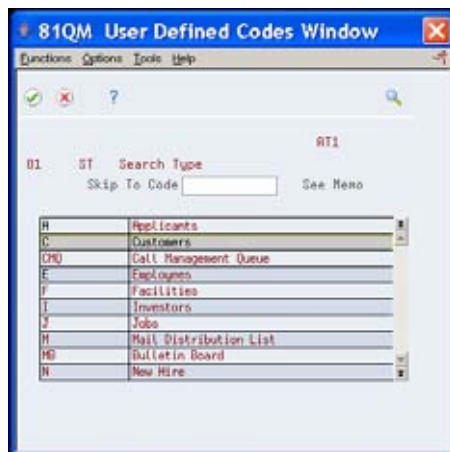
The system uses data items to define the parameters of a field or message. For example, AT1 defines the field Search Type. The system maintains each data item used in a file or retrieved for a screen or report based on a data item name, such as AT1. To work with the Data Dictionary functions you need to know this name.

The JD Edwards World field-level help displays data item names.

### To locate a data item name

Position the cursor on any field and click Help (F1).

For example, position the cursor in the Search Type field on the Address Book Revisions screen and press F1. The User Defined Codes screen displays for the Search Type field. In the upper right corner of this screen is the data item name for the Search Type field, which is AT1.



The data item name is usually in the upper right corner of the help screen, such as the User Defined Codes screen or the field explanation screen.



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# Work with the Data Dictionary

## About Working with the Data Dictionary



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Computer Assisted Design**  
From Computer Assisted Design (G92), choose **Data Dictionary**

Using the Data Dictionary, you can create data item aliases for other programming languages, work with the glossary, add or change user defined help instructions, and locate data field descriptions.

This section contains the following:

- [Working with the Data Dictionary](#)
- [Working with Data Item Alias Revisions](#)
- [Working with the Data Dictionary Glossary](#)
- [Working with User Defined Help Instructions](#)
- [Working with Data Field Descriptions](#)

## Working with the Data Dictionary

You will find the Data Dictionary selection on several JD Edwards World menus and repository services.

You can also display the Data Dictionary screen by entering the mnemonic DD in the Selection line of any JD Edwards World menu.

### To work with the Data Dictionary

On Data Dictionary, review the fields on the Data Dictionary screen.

Field	Explanation
Data Item	<p>The RPG data name. This data field has been set up as a 10-byte field for future use. Currently, it is restricted to 4 bytes so that, when preceded by a 2-byte file prefix, the RPG data name does not exceed 6 bytes.</p> <p>Within the Data Dictionary, all data items are referenced by this 4-byte data name. As they are used in database tables, a 2-character prefix is added to create unique data names in each table specification (DDS). Special characters are not allowed as part of the data item name, with the exception of #, @, \$.</p> <p>You can create protected data names by using \$xxx and @xxx, where you define xxx.</p> <p>Messages can contain up to 10 characters. Types of messages are further defined by glossary group.</p>
Rls Last Chg	The release number as defined in the Software Versions Repository file.
Glossary Group	<p>Differentiates data items into types. These types include primary and secondary types, error messages, and help text. See UDC 98/GG for a complete listing of Glossary Groups.</p> <p>See also What Are the Data Dictionary Glossary Groups? Within the Work with the Data Dictionary chapter.</p>
Item Parent	Display only. A data item which becomes the template from which other data items are created. For example: AC (Category Codes) is the parent to AC01.



Field	Explanation
Alpha Description	<p>Database text string that names the data item. Enter text in upper and lower case. The system uses this field to search for similar data items. To enter an alpha description, follow these conventions:</p> <ul style="list-style-type: none"> <li>▪ Dates - Begin all Date fields with Date</li> <li>▪ Amounts - Begin all Amount fields with Amount</li> <li>▪ Units - Begin all Unit, Quantity, and Volume fields with Units</li> <li>▪ Name - Begin all 30-byte description fields with Name</li> <li>▪ Prompt - Begin any Y/N prompting field with Prompt-</li> <li>▪ Address Number - Begin all address numbers (employee, customer, owner) with Address Number</li> </ul>
Reporting System Code	A code that designates the system number for reporting and jargon purposes. See UDC 98/SY.
System Code	A user defined code (98/SY) that identifies a JD Edwards World system.
Type	<p>This defines the type of data to be stored in the field. The data item types are defined in User Defined Codes, system code '98', record type 'DT'. Note: All amount fields should be entered as 15 bytes, 0 decimals, and data item type should be P (packed).</p> <p>Note: When using the "O" format, create the field as large as possible. This allows the use of ideographic languages such as Japanese.</p>
Size	<p>The field size of the data item.</p> <p>NOTE: All amount fields should be entered as 15 bytes, 0 decimals, and the data item type should be P (packed).</p>
Data File Decimals	The number of positions to the right of the decimal of the data item that are stored.
Data Item Class	Defines the essential attributes and characteristics of a data item.
Item Occurrences	<p>In setting up a data item in the data dictionary, you may specify a number of array elements. This will cause the automatic creation of one additional data item for each array element.</p> <p>The array data item names are restricted to certain lengths depending on the number of array elements:</p> <ul style="list-style-type: none"> <li>▪ 3 bytes - 1 to 9 elements</li> <li>▪ 2 bytes - 10 to 99 elements</li> <li>▪ 1 byte - 100 to 999 elements</li> </ul>

Field	Explanation
Display Decimals	Use this parameter to designate the number of decimals in the currency, amount, or quantity fields the system displays. For example, U.S. Dollars would be 2 decimals, Japanese Yen would be no decimals, and Cameroon Francs would be 3 decimals.
Row Description	<p>This is the default row description used in the Vocabulary Overrides for screens and reports. Creates the title on text and reports. It is used in a manner similar to the column description in the query facility. It should be less than 35 characters. Use abbreviations whenever possible. For example:</p> <p>U/M Units of measure YTD Year-to-date MTD Month-to-date PYE Prior year end QTY Quantity G/L General ledger A/P Accounts payable DEPR Depreciation</p>
Column Title	The first line of description that will be used in column headings on a report or screen. This description should be no larger than the data item size, if possible. If the column heading is only one line, it should be placed in this column. Use the second line of the Column Title when one is not clear.
Default Value	<p>Used as the initial value on the data entry screen for the associated data item. The value entered must be the exact same length as the data item size. Place single quotes around the value if it contains any embedded blanks. The keywords *BLANKS and *ZEROS can be used as the default value. When entering a numeric data item with default values, the redisplay of the data item suppresses all leading zeros.</p> <p>CAUTION: If a blank entry is allowed, default values should not be used.</p>
Data Display Rules	<p>Keywords which describe a formatting technique applied when data is displayed.</p> <p>The developer can override these rules at the time of program creation.</p> <p>The current list of these rules is kept in the User Defined Codes table 98/DR.</p>

Field	Explanation
Data Edit Rules	<p>Keywords which describe an editing technique applied when data is entered. Validation applied to the data after Enter is pressed.</p> <p>The rule will be applied as specified in the F9207 table at the screen/report and/or the action code as desired.</p> <p>The developer can override these rules at the time of program creation.</p> <p>The current list of these rules is kept in the User Defined Codes at SYSTEM = 98 and RECORD TYPE = ER.</p>
Search Program	<p>The Help Text Program field is used to call a program when the function key - F1 is pressed on its Data Item. When F1 is pressed, the program entered in this field will be executed. If this field is left blank, the glossary will be used. If you wish the User Defined Code window to appear when F1 is pressed, enter '*UDC' in this field (this is the default when 'UDC' is entered in the Data Edit Rules field). If you do not want the UDC window to appear and you have 'UDC' in the Data Edit Rules field, change this field to be blank.</p> <p>Program Requirements: For your text program to work correctly, you must allow it to accept three standard parameters:</p> <ul style="list-style-type: none"> <li>▪ PARM 1 Field Name, size 10, type alpha</li> <li>▪ PARM 2 Return Value, size 30, type alpha</li> <li>▪ PARM 3 Return Description, size 30, type alpha</li> </ul>
Justify	A code of R indicates that the numeric field is to be right justified and zero filled. A code of L indicates that the field defined is to be left justified.
Next Nbr System	Designates the system number for the Next Number retrieval. See User Defined Codes, system code '98', record type 'SY'.
Next Number Index	The array element number retrieved in the Next Number Revisions program. For example, the next voucher number is array element '02' of system '04'.

## Data Dictionary Security

Once a system is operational, you must be particularly careful to secure the integrity of the Data Dictionary. Two facilities are provided to aid you with the security:

- Operational systems coding: You define system numbers and names in User Defined Codes, system code 98, record type SY. If you place an X in the second line of description for a particular system, it is designated as

operational. Once a system is set up as operational, all data fields coded to this system are protected from modifications. However, you can violate this control by removing the X in User Defined Codes.

- **Action Code Security:** A more prudent form of control is for you to assign change and delete authority to only one individual, the database administrator. If you choose to use this control, you should restrict access to the Data Dictionary program (P9201) in Action Code Security. See *Working with Action Code Security*. All users must be set up with add authority only. The database administrator is set up with add/change/delete authority.

## The Functions for the Data Dictionary

The following functions are available from the Data Dictionary screen.

### Data Item Search

**Data Item Search (F4)** — A data item search facility. If you are a double-byte user, you must provide a search description for each data item you create or change in order for the search facility to function properly. Enter the search text in the Search Description field on the Data Dictionary screen.

### Data Item Alias Revisions

**Data Item Alias Revisions (F5)** — Data Item Alias Revisions

### User Defined Code Tables

**User Defined Code Tables (F8)** — User Defined Code Tables

## What are the Data Dictionary Glossary Groups?

The Data Dictionary consists of several glossary groupings that define the data item in the JD Edwards World software. All glossary groups typically have associated text that is stored in the glossary. The major glossary groups follow:

Glossary Group	Description
E	JD Edwards World interactive error messages <ul style="list-style-type: none"><li>▪ JD Edwards World defines interactive error messages with numbers less than 5000 and with numbers from 000A to 999Z. For example, 0001 or 595C</li><li>▪ Client defines interactive error messages with numbers from 5001 to 9999</li></ul>

Glossary Group	Description
M	<p>Menu Messages</p> <ul style="list-style-type: none"> <li>JD Edwards World defines menu message data items as MENUMSGxxx, where xxx represents a number. For example, MENUMSG044</li> <li>Client defines menu message data items as MENUCLTxxx, where xxx represents a number</li> </ul>
J	<p>JD Edwards World batch error messages</p> <ul style="list-style-type: none"> <li>JD Edwards World defines batch error messages with JDExxxx, where xxxx represents a number less than 7000. For example, JDE0001 or JDE5000</li> <li>Client defines batch error messages with JDExxxx, where xxxx represents a number greater than 7000 and less than 9000</li> <li>The QJDEMSG message file contains batch error messages</li> <li>A JD Edwards World program found on Rebuilds and Global Updates (G9642) must build the batch error messages files QJDEMSG</li> </ul>
C	<p>Data Item Functions Categories</p> <ul style="list-style-type: none"> <li>Groups common data elements</li> <li>For example, CURRENCY</li> </ul>
D or S	<p>Primary or Secondary Data Items</p> <ul style="list-style-type: none"> <li>Used for validations</li> <li>Text on Screens and Forms</li> <li>Text on Reports</li> <li>Field Reference Files - F98FRFA-Z \$ and @</li> <li>For example, AC for a D data item; AC01 for an S data item</li> </ul>
F	Files
G	<p>General Narrative: Use to add information about a specific data item, for example: G0094</p>
H	<p>User Defined program Helps</p> <ul style="list-style-type: none"> <li>Client use only for adding custom helps for JD Edwards World programs</li> <li>For example, U00MENU</li> </ul>

Glossary Group	Description
L	Report Messages: Messages or warnings for certain procedures, or letters written and produced through DREAM Writer, for example: AG30
N	<p>Program Notes</p> <ul style="list-style-type: none"><li>▪ Used by programmers to type notes about a program in the system</li><li>▪ Add the notes to the glossary in the Data Dictionary</li><li>▪ Create notes for a program, add a data item with an N as a prefix in front of the program name. For example, N01051 for program notes about Address Book Revisions</li><li>▪ View the notes using F9 off the Help Task List screen for the Address Book Revisions screen, for example: N00HELP</li></ul>
P	<p>Program Purposes</p> <ul style="list-style-type: none"><li>▪ Used in the general summary help instructions</li><li>▪ Used for the Program Generator Product</li><li>▪ For example, P01051</li></ul>
R	Report Data Elements: The majority of these data items are letters produced through DREAM Writer, for example: Letter1
T	<p>Terms</p> <ul style="list-style-type: none"><li>▪ These data items are definitions of commonly used terms</li><li>▪ The prefix of the data item name is TERM. For example, the AAI definition is in the glossary under the data item TERMAAI.</li></ul>
U	<p>For work fields that a program utilizes</p> <ul style="list-style-type: none"><li>▪ Begin with #</li><li>▪ For example, #AA</li></ul>

## Working with Data Item Alias Revisions

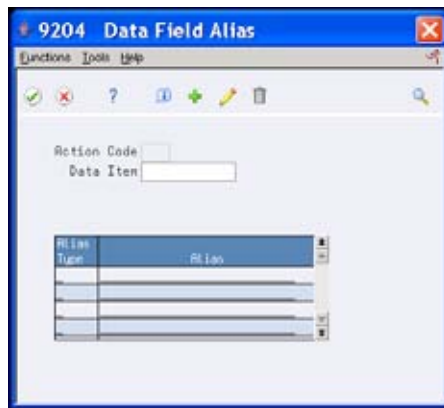
Use the Data Item Alias screen to assign alias names to a data item that other programming languages will use. When adding a data item of glossary group D or

S, you must enter an alias for that field. This window automatically appears on an Add function when the alias is not unique. The alias defaults from the alpha description.

When adding a data item, if the alias is not unique, the system adds 9 to the end of both the C and COBOL alias description to make it unique.

## To work with data item alias revisions

1. On Data Dictionary, choose Data Item Alias Revisions (F5). The Data Field Alias screen displays.



2. Enter an alias type and name.

An alias name must be unique to the system or the system will not let you exit from the Data Field Alias screen.

Current alias types required:

- 1 = PL1 or COBOL
- 2 = C language

An alias needs to adhere to JD Edwards World syntax rules of the C language.

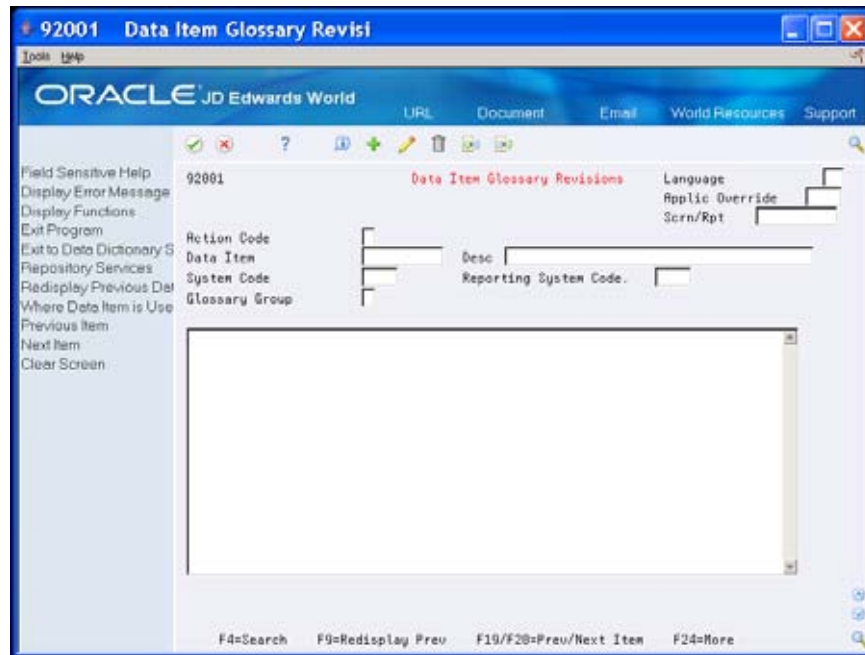
## Working with the Data Dictionary Glossary

### To work with the glossary

The Data Dictionary Glossary is a text editor for messages and help text.

1. On Data Dictionary, choose Exit to Glossary (F10). The Data Item Glossary Revisions screen displays.

If your glossary group is E, H, J, or M, this screen automatically displays when you press Enter on the main Data Dictionary screen.



2. Do the following as they apply:

- Use the Language, Applic Override, and Scrn/Rpt fields for jargon. See *About Language and Jargon* for details.
- Page up and page down to see additional text lines.
- When entering an E glossary group item, which is an interactive error message, use F5 to define a program, screen, or report to reference when the system displays the error message.
- On double-byte machines, this screen displays the Search Desc field. To ensure the data item search facility will function properly, you must enter a search description for each data item you create or change. You can enter it on this screen or on the Data Dictionary screen.

3. Always leave the last two character positions of each text line blank.

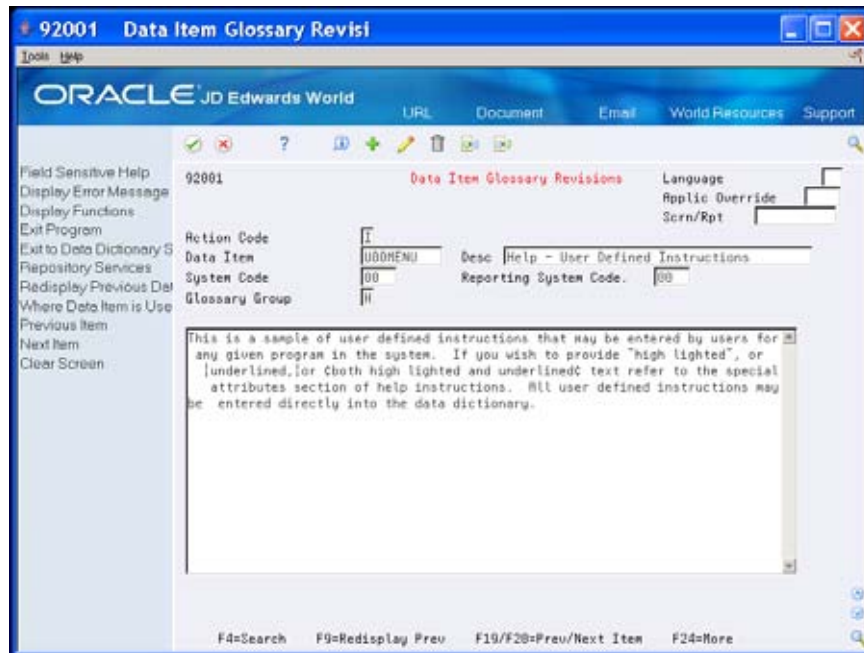
## Working with User Defined Help Instructions

The easiest way to modify help instructions is to utilize the User Defined Instructions in Data Dictionary.

### To work with user defined help instructions

1. On Data Dictionary, choose Exit to Glossary (F10). The Data Item Glossary Revisions screen displays.





JD Edwards World provides an example record (U00MENU) in your system.

2. Enter a program name in the Data Item field, replacing the P with U. For example, for program P01051, create a data item U01051.
3. Enter H in the Glossary Group field. The H Glossary Group defines user defined help instructions. JD Edwards World does not replace H Glossary Group data items during an upgrade.
4. Click Add or Change.

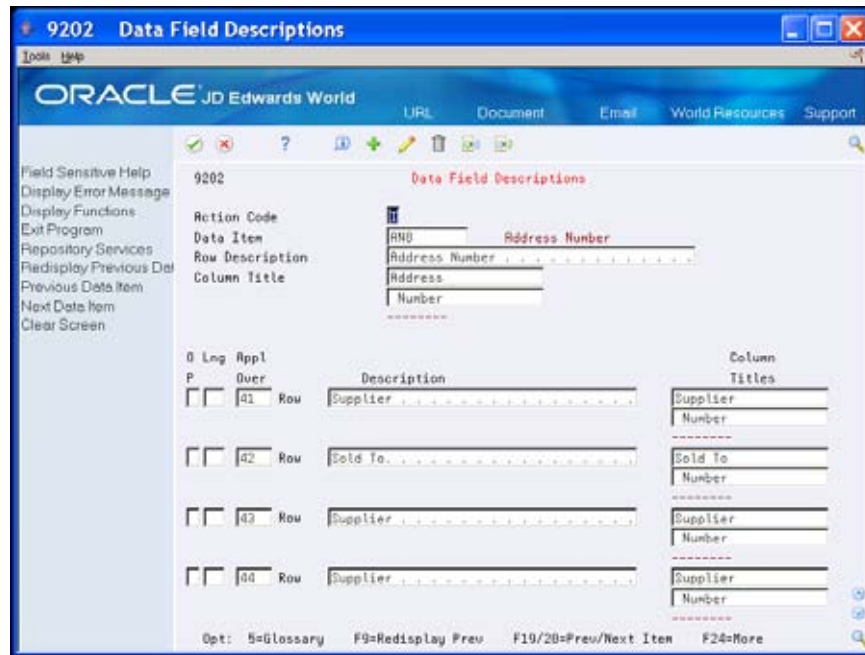
From the Help Task List screen, F5=User Inst displays if you wrote your own User Defined Help instructions

## Working with Data Field Descriptions

Use Data Field Descriptions for adding such information as alternate language translations and jargon.

### To work with data field descriptions

1. On Data Dictionary, choose Data Item Descriptions (F11). The Data Field Descriptions screen displays.



2. Enter specific jargon or language descriptions for each data item. See *About Language and Jargon* for details.

## Error Messages

Error messages found within the ranges reserved for customer defined batch and interactive error messages

- The customer defined interactive error ranges are 5001 to 9999. The customer defined batch error message ranges are JDE7001 to JDE8999
- Any JD Edwards World defined error messages in the Data Dictionary found within the customer reserved ranges can either be deleted or overwritten and reused by the customer.
- None of JD Edwards World programs reference any error messages that fall within the customer reserved ranges. For this reason it is safe for customers to delete or reuse any JD Edwards World defined error messages found in the customer reserved ranges.

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# Work with the Next Numbers Facility

## Working with the Next Numbers Facility

The Next Number facility controls the automatic numbering for such items as new G/L account numbers, voucher numbers, address numbers. It allows you to specify what numbering system you want to use and gives you a method of incrementing numbers to reduce transpositions and keying errors.

The next numbers file is F0002 and is designated “common”:

- 10 element array
- 1 record per system
- Modulus 11 check optional

Once set, do not change the next numbers file because it:

- Impacts system performance.
- Does not duplicate numbers. When it reaches a maximum, the Next Numbers starts over.
- Cannot change position of the user or add a new entry without programming modifications.

Next numbers ties in with the Data Dictionary. Data item in Data Dictionary points to the Next Number System. For example, System Code 09 AID Data Item.

This section contains the following:

- [Locating the Next Numbers Facility](#)
- [Working with Next Numbers by Company and Fiscal Year](#)



From Master Directory (G), choose <b>Hidden Selection 29</b> From General Systems (G00), choose <b>Next Numbers</b>
--

## Locating the Next Numbers Facility

### To locate the Next Numbers facility

On Next Numbers, complete the following field:

- Product Code



- On Next Numbers by Company/Fiscal, set the Next Number constant field to maintain next numbers by

- Company
- Company and Fiscal Year

Use Next Number by Company for these original documents:

- Journal Entries
- Accounts Payable Vouchers
- Accounts Receivable Invoices
- Sales Orders
- Purchase Orders



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# Review the Field Reference File Rebuild

## About the Field Reference File

The Field Reference File (FRF) contains the specifications for each data item in the JD Edwards World Data Dictionary. Because the JD Edwards World Data Dictionary is different from the standard IBM data dictionary, each data item record needs to be translated from the JD Edwards World standard to the IBM standard.

When building the FRF, JD Edwards World groups the data items alphabetically. For example, items that begin with the letter A are translated into the IBM-readable format and stored in file F98FRFA. Data items that begin with B are in F98FRFB.

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**Note:** Your custom Data Dictionary data items are stored in F98FRF\$ and F98FRF@.

---

You can rebuild one FRF at a time. It is also possible to build the JD Edwards World Message Files in alternate languages.

## What Happens When You Rebuild the File?

The system does the following:

- Rebuilds F98FRFA-Z, \$, and @
- Picks up Data Dictionary data item glossary groups D and S
- Rebuilds the message file (QJDEMSG) in QGPL. Uses a processing option (Form ID J98DDMSGF) to determine which library to build the QJDEMSG file. The default is QGPL
- Does not rebuild the JD Edwards World message file if entering a single field reference file to be built
- Builds a separate message file for each language installed. Enter \*\* for all languages installed on the system.
- Generates or rebuilds for every letter of the alphabet. Each file contains all the data dictionary items beginning with that letter. For example, file F98FRFA contains data items AALD, A2TR, A5TR.
- Reads the data dictionary file records with data item glossary groups of D and S and updates the FRF files with each data item name, size, type, row description and column title.
- Uses the FRF files (with references to certain data items within them) when creating and compiling physical files, e.g. F0101.

Always rebuild the files in the same library as previously built.

This section contains the following:

- [About the JD Edwards World Message File](#)
- [Locating the Rebuild FRF and JD Edwards World Msg File Screen](#)

## About the JD Edwards World Message File

The JD Edwards World Message (QJDEMSG) file contains all the messages that are coded Glossary Group J. The programs access the messages from this file. If you add messages with Glossary Group J, a rebuild is necessary to correctly add the new messages to the JD Edwards World Message (QJDEMSG) file.

### What Happens When Only Rebuilding the JD Edwards World Message File?

When building the JD Edwards World message file, the system does the following:

- Rebuilds the message file (QJDEMSG) in QGPL. Uses a processing option (Form ID J98DDMSGF) to determine which library to build the QJDEMSG file. The default is QGPL
- Picks up Data Dictionary data item glossary group J
- Builds the QJDEMSG file in QGPL. If you want to change this default, access Dream Writer Form ID J98DDMSGF and change the processing option for version ZIDE0001 to the library in which you want the message file built. Because the JD Edwards World message file resides in the QGPL library, it should be rebuilt in the latest release. If it is not, any messages included in the latest release will be lost.

Enter a value from UDC table 01/LP to generate a message file for a single language. Enter '\*\*' for all languages installed on the system.

## Locating the Rebuild FRF and JD Edwards World Msg File Screen

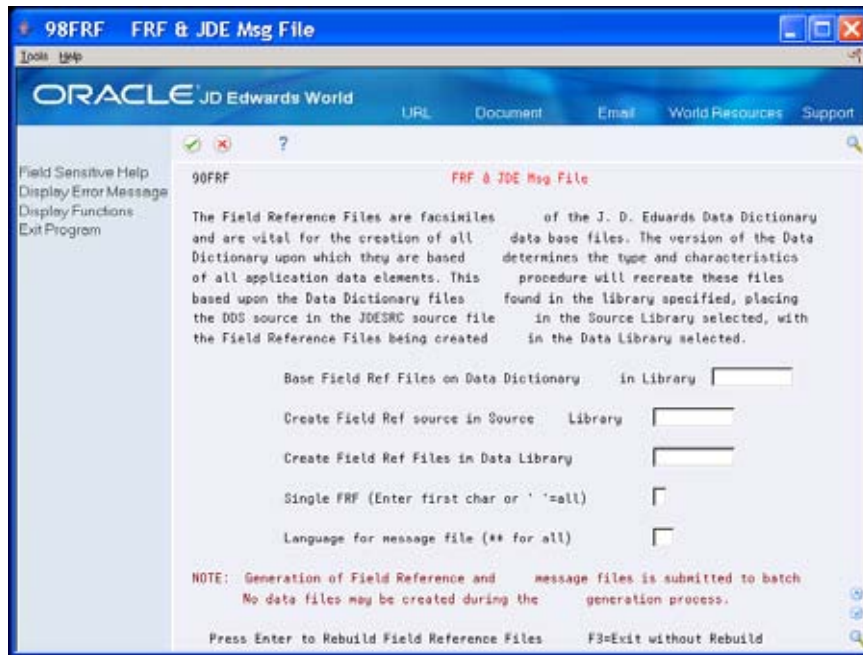


From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Computer Operations**  
 From Computer Operations (G96), choose **Rebuilds & Global Updates**  
 From Rebuilds & Global Updates (G9642), choose **FRF & JD Edwards World Msg File**

### To locate the Rebuild FRF & JD Edwards World Msg File screen

1. On FRF & JD Edwards World Msg File, enter the name of the library that contains the data dictionary file F9200 in the following field:
  - Base Field Ref Files on Data Dictionary in Library





2. Enter QTEMP in the Create Field Ref source in Source Library field.

The program will attempt to create the source for the FRFs in the library you specify regardless of whether the source existed before or not. If the program finds duplicate source it will end with an error.

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**Note:** You must enter QTEMP in this field. By specifying QTEMP, the program deletes the source when you sign off. It is not necessary to keep the source for these files on the system.

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3. Enter the name of the library that contains the FRF files in the following field:

- Create Field Ref Files in Data Library

If this is a new install, you do not have files. You specify the COM type library (or the DTA type if no common library). If these files exist on your system, enter WRKOBJ F98FRF\* on the command line to determine where they currently exist. Enter the library where they reside in this field.

4. Enter only one specific FRF file over which to run the rebuild in the following field:

- Single FRF (Enter first char or ' '=all)

\$, @, A-Z, or blank = all

---

**Note:** If you specify a value other than blank, the Rebuild JD Edwards World Message File does not run.

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5. Complete the following field:

- Language for Message file (\*\* for all)



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## 13 Vocabulary Overrides



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# Overview to Vocabulary Overrides

## Objectives

- To understand how Vocabulary Overrides work
- To understand the flow of displaying text on screens and reports
- To understand Vocabulary Override rebuilds

## About Vocabulary Overrides

A screen or report consists of two parts:

- Data
- Literal text

Literal text is usually hard-coded or imbedded into a given computer program. JD Edwards World flexibility has made all literal text soft-coded rather than hard-coded, making it easier for you to change the text on screens and reports.

This section describes the following:

- Work with Vocabulary Overrides
- Work with Vocabulary Override rebuilds



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# Work with Vocabulary Overrides

## Working with Vocabulary Overrides

Each screen and report in all JD Edwards World software products has a master file record containing all of the narrative text associated with that screen or report. You can update this master record using Vocabulary Overrides.

Vocabulary Overrides are known as soft coding because you can make changes to individual videos and reports without changing values in the Data Dictionary or having to use Screen Design Aid or Report Design Aid.

The Default Title field is for the screen title. The system uses the default title if users access the screen from another screen, rather than a menu. When accessing a screen from a menu, the system uses the selection title as the screen title. The Text Description field is for text as it is to display on the screen. The system displays Scr Fld and Fld Size fields for information only. These fields only change if there is a program change. The system might not display the fields in the order they display on the screen. This does not affect the screen display.

Change one screen or report at a time. You can run global update (G9642), Video/Report/DW Data. The system will not update fields that you override using a Y in the OR field.

The system stores the Vocabulary Override (soft-coding) data in the Screen/Report Text Master (F9220) file

This section contains the following:

- [Locating Vocabulary Overrides](#)
- [Displaying Text on Screens and Reports](#)
- [Reviewing the Function Key Definitions](#)
- [Working with Generic Exits](#)

## Locating Vocabulary Overrides



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **Vocabulary Overrides**

The Vocabulary Override feature of JD Edwards World systems allows you to make specific, rather than global, screen and report changes to the literal text. These changes take effect immediately.

You can also access Vocabulary Overrides from the Computer Assisted Design menu (G92), entering VO on a command entry line, or on the Other Documentation Reports menu (G9131).

## To locate Vocabulary Overrides

Complete the applicable fields.

**9220 Vocabulary Overrides**

Oracle JD Edwards World

Tools Help

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Repository Services  
Display Previous Record  
Browse SDA/RDA  
Function Key Translation  
Clear Screen

9220 Vocabulary Overrides

Language  
Applic. Override

Action Code: [F]  
Screen/Report: P01200  
Default Title: Name Search  
Skip to Field: [F01200]  
Help: Start: P01200  
Help: End: P01200

Error Text for Line 24  
[NAME]

Special Exit Message  
Opt: 1=AB 4=Sel 8=CIF 9=Phone F5=Col 2 Fmt F8=Bank F16=Query F24=More

Text Description	Item	R	H	+/-	Fld	Size
Alpha Name	ALPH				001	14
Search Type	AT1				002	16
Person/Corp	ITXC				003	16
OP	SELC				004	2
Alpha Name	ALPH				005	
Mailing Name	RLNR				006	
Address Line 1	ADD1				007	
City	CTY1				008	
Phone Number	PH1				009	
Alt #	RND				010	4
Alt Key	RLKY				011	8

F13=Browse SDA/RDA F16=Function Key Trans F9=Display Previous F24=More

Field	Explanation
Language	<p>A user defined code (01/ LP) that specifies a language to use in screens and printed reports.</p> <p>If you leave the Language field blank, the system uses the language you specify in your user preferences. If you do not specify a language in your user preferences, the system uses the default language for the system.</p> <p>Before any translations can become effective, a language code must exist at either the system level or in your user profile.</p> <p><i>Screen-specific information</i></p> <p>On this screen, use the Language code to indicate alternate languages for screens and reports.</p>
Applic. (application) Override	<p>A code that designates the system number for reporting and jargon purposes.</p> <p>See UDC 98/SY.</p>



Field	Explanation
Screen/Report	Screen or report file name (e.g., V01011 or R01402).
Skip to Field	Screen/report text data field name which ties directly to the name in the DDS specifications for the screen/report file. Do <i>not</i> change this field arbitrarily. If you change it here, you have to modify the DDS specs as well as the key lengths in the program.
Default Title	The vocabulary overrides title used on screens and on reports. On screens, the title is retrieved from the Menu file. If a record is not found, then the title is retrieved from the Vocabulary Overrides file. Report titles will be retrieved from the DREAM Writer Version ID (F98301).
Help:Start	The Help Start Key is used to reference the program to specific program help instructions. Typically, this key is simply the program number. It is always preceded with a P as in Program - never a J as in Job. This is the starting key for displaying help instructions for this item.
Help:End	The Help End Key is used to reference the program to specific program help instructions. Typically this key is simply the program number. It is always preceded with a P as in Program - never a J as in Job. This is the ending key for displaying help instructions for this item.
Error Text for Line 24	<p>A reserved data area on line 24 of each screen used to display function keys and options. The system standard and system default is *SAME. If the system detects an error on a screen, line 24 is highlighted.</p> <p>You can also enter specific text to appear.</p>
Special Exits Message	<p>The 24th line of each screen display is reserved to document:</p> <ol style="list-style-type: none"> <li>1. function key exits,</li> <li>2. selection exits,</li> <li>3. 2nd and 3rd page program exits,</li> <li>4. errors which are not related to a specific piece of data.</li> </ol>
Text Description	Soft coded text for all screen/report literals. If you want to override this description, verify that the override has a Y. Otherwise, whenever this screen/report changes or a batch rebuild is run, the screen or report is automatically updated from information in the data dictionary.
Data Item	<p>The data dictionary data item name (see DTAI) or if left blank, an override text field set up through Screen Design Aid.</p> <p>Note: Information in this field should only be modified through screen design aid. This is the key used in programs to retrieve the vocabulary overrides and field level helps.</p>

Field	Explanation
O R	A code of "Y" designates that the data dictionary row title is to be overridden in favor of the specified literal text. If there is a "Y" next to any description, it will be bypassed on a rebuild from the data dictionary (see Rebuild Video/Report/DW - J0021JQ). A value of "J" in this field designates the same as a "Y" but is allowed to be replaced in the Vocabulary Overrides Merge. The intent of the "J" is to differentiate between overrides originated by JD Edwards World and those overrides entered at the client site.
C H	A code of 1 indicates the system uses the first line of the Data Dictionary column title for the text description of this data item. A code of 2 indicates the system uses the second line of the Data Dictionary column title for the text description. If this field is blank, the system uses the Data Dictionary row description.
Pos (positon) +/-	Override the position in the VTX field where the text from the data dictionary will start. Usually a value of 0, you can also specify 'CTR' for centering and a value greater than 1 for indentation. A negative value may also be entered to shift the text to the left. This feature is available only when the Override field is blank; that is, only when you are not overriding the data dictionary text.
Screen Fld (field)	Screen/report text data field name which ties directly to the name in the DDS specifications for the screen/report file. Do <i>not</i> change this field arbitrarily. If you change it here, you have to modify the DDS specs as well as the key lengths in the program.
Fld (field) Size	The field size of the data item.  NOTE: All amount fields should be entered as 15 bytes, 0 decimals, and the data item type should be P (packed).

## What are the Function Keys for Vocabulary Overrides?

The following function keys are available for Vocabulary Overrides:

### Browse SDA/RDA

Browse SDA/RDA (F13). Allows you to display the source for the screen or report. You must have source installed on your system.

### Function Key Translations

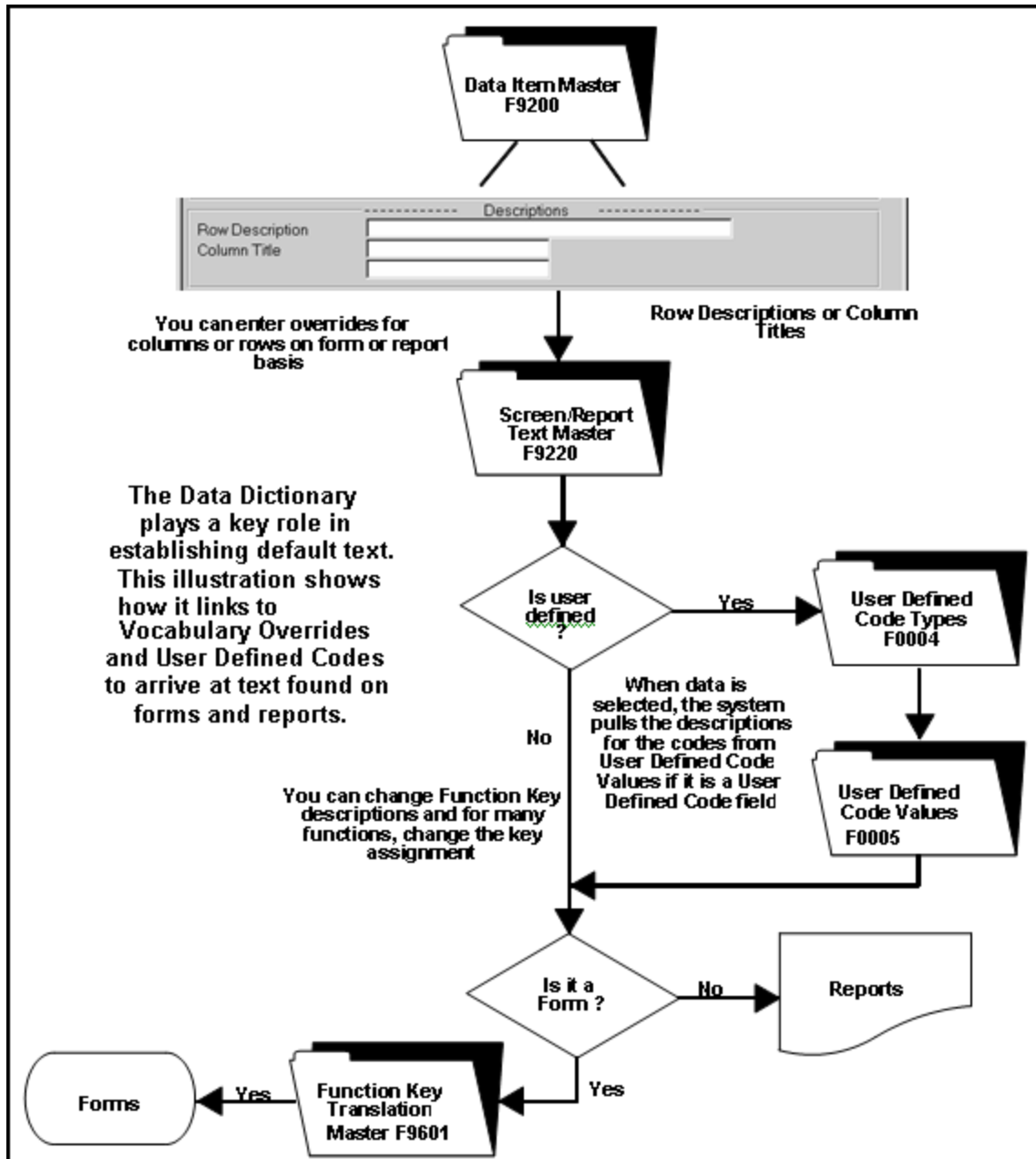
Function Key Translations (F16)

## Displaying Text on Screens and Reports

While the system stores the Column and Row Titles for a field in the Data Dictionary, you can override them using the Vocabulary Overrides facility. The following flow illustrates how the Data Dictionary works with User Defined Codes and Vocabulary Overrides to display text on a screen or report.

1. The system retrieves the default text from the Data Item Master (F9200).
2. The system retrieves any vocabulary overrides from the Screen/Report Text Master (F9220) file.
3. The system checks for user-defined information. If there are user-defined values, the system retrieves them from User Defined Code Types (F0004) and User Defined Codes (F0005)
4. If it's a report, the system produces the report
5. If it is a screen:
  - The system retrieves any function key translations from Function Key Translations Master(F9601)
  - The system displays the screen

The following illustrates the flow:



## Reviewing the Function Key Definitions



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **Function Key Definitions**

Use Function Key Definitions to change the value of a function key. For any screen, you can change a function key that is input capable. Simply change the Key/Opt field to the number you desire.

You can only change the value of a function key that is already included in the program. Adding new function keys to a program requires modification of the RPG code.

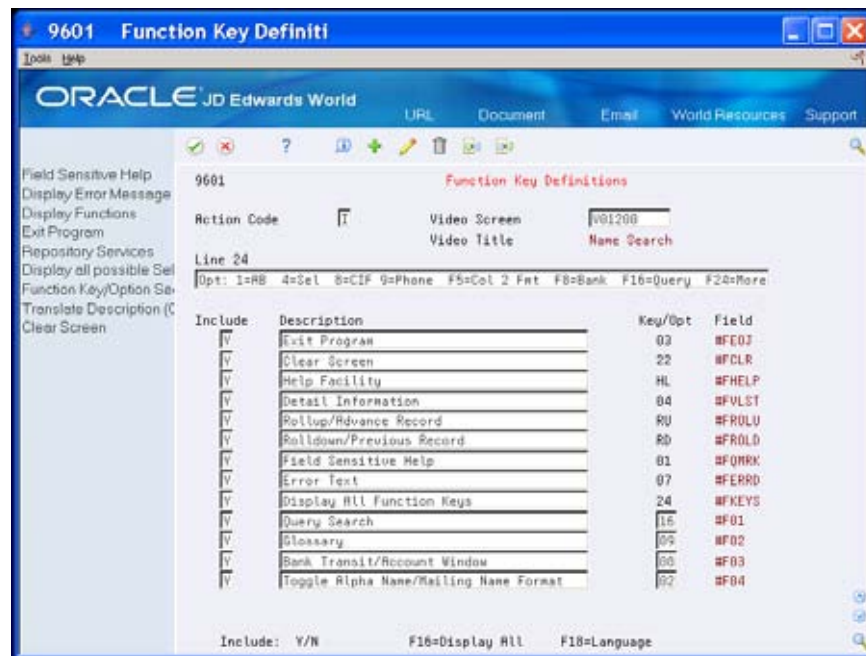
The standards functions for any screen are locked. You cannot reassign the function key number. To unlock the standard function use the following User Defined Codes table: System Code 96, Code Type FX, with the right margin of Description-2.

Use caution when changing functions. If you change a standard function, unpredictable results may occur.

The function translation files are: Function Key Translation Master (F9601), and Function Key Translation Detail (F9611).

The More Details (F4) function:

- The system enters information from the SVR field, Base Member Name, into the Program To Call field.
- You can use only your custom function key from the F24 menu. Press F24 to view the list of function keys. The description of your custom function key displays. From here, enter 4 next to the user defined function key.
- The file is the Generic Function Key Master (F96012).



The Function Key Security (F17) is the only function available on Function Key Definition:

## Defining Function Keys



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **Generic Exit Definition\**s

Occasionally there is a need to exit a program that is not already defined as an exit in the base software. Within JD Edwards World software, you can define specific function keys to call programs of your choice.

## To define the function keys

1. On Generic Exit Definition, complete the Country and Language fields if applicable. In the Video Name field, enter the name of the video from which to call the program from the new function key. The available function keys begin with #G. The available keys are #G01 - #G30 for each program.

[illegible]

2. Enter the new function key name in the Field Name field. For example, enter #G01.
3. Enter the name of the program being called in the Description field.
4. Enter the name of the program in the Program To Call field.  
This can be any type of program: CL, RPG, custom or JD Edwards World.
5. Complete the following fields if you are calling interactive programs that utilize processing options:
  - Form ID
  - Version ID

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**Note:** You can call only online programs. You cannot call any batch processing.

User defined function keys are included within security and are secured like any other function key.

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**Caution:** Some programs expect parameters to be passed when you call them. Press F4 (More Details) to display parameter fields. If you do not pass the correct parameters, the call to the program fails.

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## Working with Generic Exits



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **Generic Exit Definitions**

Generic exits provide the following features:

- Ability to run other programs from within an application without modifying program code
- Ability to maintain custom files
- Ability to inquire into new applications
- New functionality

Generic exits allow you to exit to custom programs without further modifications of the program code. For example, your company might use custom programs to provide localization solutions that comply with country specific legal requirements and business practices. After developing the programs, you must be able to access them from within an application. Generic exits provide that access. Before Generic Exits, the only way to provide access was to make additional modifications to the custom program. This meant increased maintenance of custom code, especially when upgrading to a new release.

This section includes the following tasks:

- Adding generic exit definitions
- Executing the generic exit

---

**Note:** These steps are recommended when calling an interactive program.

---

### To add generic exit definitions

1. On Generic Exit Definition, locate the video to which you want to attach generic exits.





- Language fields if applicable.

For example, you can define a Spanish G01 and a French G01. If you have S (Spanish) in the Language field, the Spanish G01 might take you to A/R Inquiry. If you have F (French) in the Language field, the French G01 might take you to A/P Inquiry for the same screen.

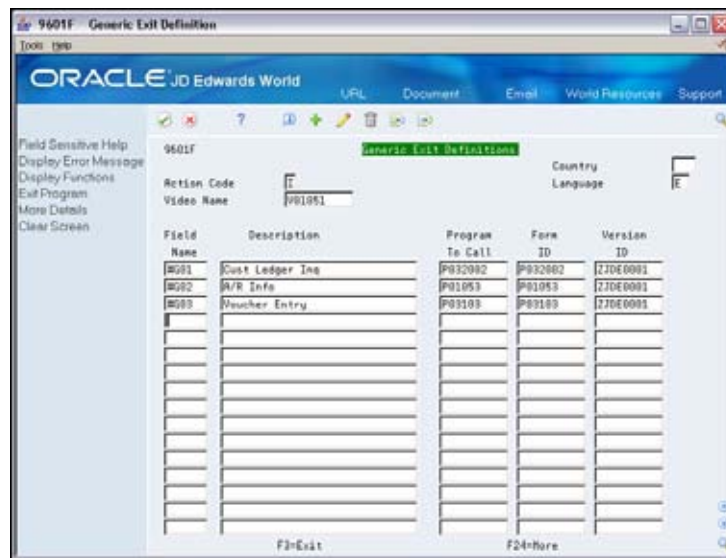
Field	Explanation
Action Code	<p>A code that indicates the activity you want to perform. Valid codes are:</p> <p>A     Add</p> <p>C     Change</p> <p>D     Delete</p> <p>I     Inquire</p> <p>.     End the program</p> <p>Blank Clear the screen</p> <p>If you enter a code that is not active, the system highlights the code and no action occurs.</p> <p>Depending on how your company has set up action code security, you might not be authorized to use all action codes.</p>
Country	A user defined code (00/CN) that identifies a country. The country code has not effect on currency conversion.
Language	<p>A user defined code (01/ LP) that specifies a language to use in screens and printed reports.</p> <p>Before any translations can become effective, a language code must exist at either the system level or in your user preferences.</p>
Field Name	The generic exit field (#G01 - #G30) used to control the sequence displayed on the generic function key window. Also used in Function Key Security to secure the generic exits. Field Name and the header fields are the unique key to the F96012 file.
Description	A user defined text which appears on the generic function key window.
Program To Call	The program to call when selected from Function Key window.
Form ID	<p>Enter the name of a variable already defined in the Calling Program (Parm 1 in a program this is not a DREAM Writer program).</p> <p>Or, if the Program To Call is a DREAM Writer, enter the form ID.</p>

Field	Explanation
Version ID	Enter the name of a variable already defined in the Calling Program (Parm 2 in a program this is not a DREAM Writer program).  Or, if the Program To Call is a DREAM Writer Writer, enter the form ID.
Parm 1 – Parm 10	Enter the variable name which contains the value for this parameter. Can also enter *BLANK (passes parameter with blanks), *ZERO (passes the parameter with zeros), a constant (must be enclosed in single quotes 'xxxxx'), or a variable (passes the parameter with the value retrieved from the variable) for this parameter. If you leave this field blank, no parameter will be passed.
Calling Program	The name of an executable program.

## To execute generic exits

1. Access the video to which you attach the generic exits.
2. Press F24.

This is the only way to access the generic exits.



3. Choose the generic exit.


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# Work with Vocabulary Override Rebuilds

This section contains the following:

- [Reviewing Cursor Sensitive Controls](#)
- [Reviewing the Video/Report Data](#)
- [Reviewing Copy DD, VO, DW, UDC, SVR, Menus](#)
- [Reviewing Vocabulary Override Field Lengths](#)

## Reviewing Cursor Sensitive Controls

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Computer Operations</b> From Computer Operations (G96), choose <b>Rebuilds &amp; Global Updates</b> From Rebuilds and Global Updates (G9642), choose <b>Cursor Control File</b>
---	--

If you do not use the JD Edwards World compiler within Software Versions Repository to compile a form, your cursor-sensitive help text may not function properly. For example, it may display the wrong glossary for a field. Correct this using the Cursor Control File program .

The cursor control file:

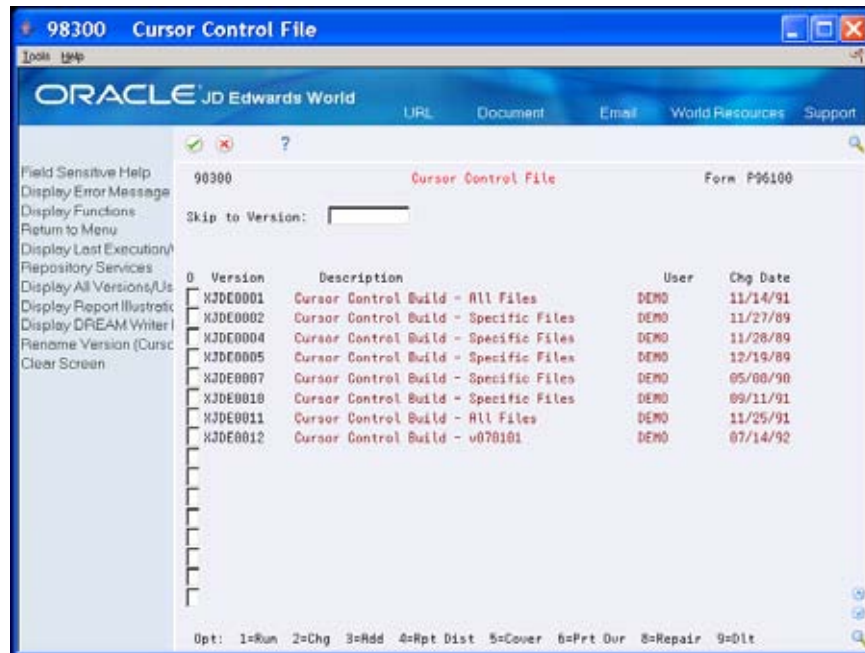
- Requires source code
- Only needs to be rebuilt if a program was modified outside of JD Edwards World software
- Can run for single programs if the cursor control helps are out of synchronization.
- The F9220, F9601, F9611, F9612, F9620, and F9621 files must reside in the same library
- When using JD Edwards World compiler to compile a form, it will automatically rebuild the cursor controls for that form

The cursor sensitive control files are:

- Cursor Sensitive Control Master (F9620)
- Cursor Control Format Master (F9621)

## To review cursor sensitive controls

On the Message screen, press F6.



## Reviewing the Video/Report Data



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Computer Operations**  
 From Computer Operations (G96), choose **Rebuilds & Global Updates**  
 From Rebuilds and Global Updates (G9642), choose **Video/Report Data**

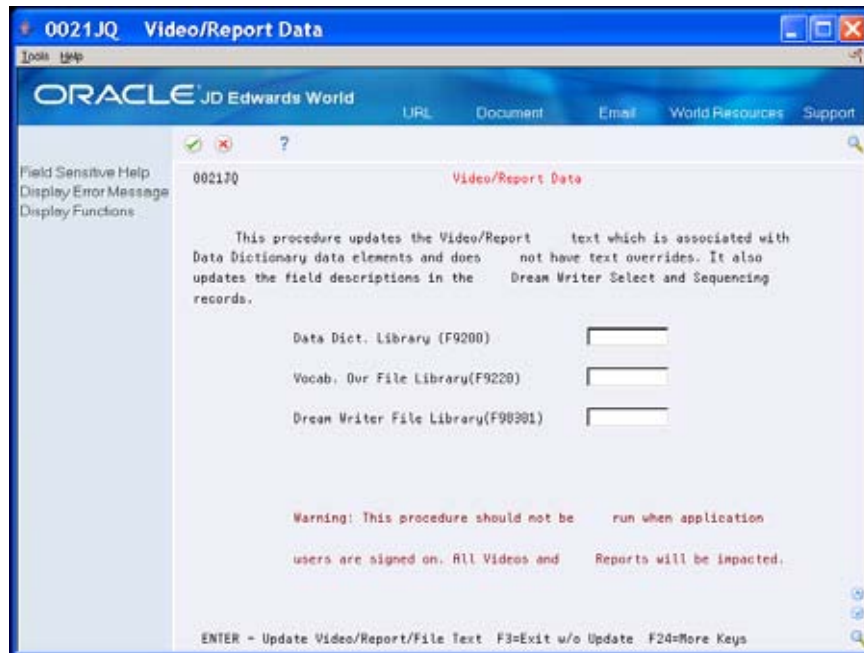
Use this rebuild to populate the Vocabulary Override records with the Data Dictionary row and column description. This is an easy way to update all your forms.

This program updates the Data Dictionary to:

- Vocabulary Overrides
- DREAM Writer

### To review the Video/Report Data

On the Message screen, press F6.



## Reviewing Copy DD, VO, DW, UDC, SVR, Menus



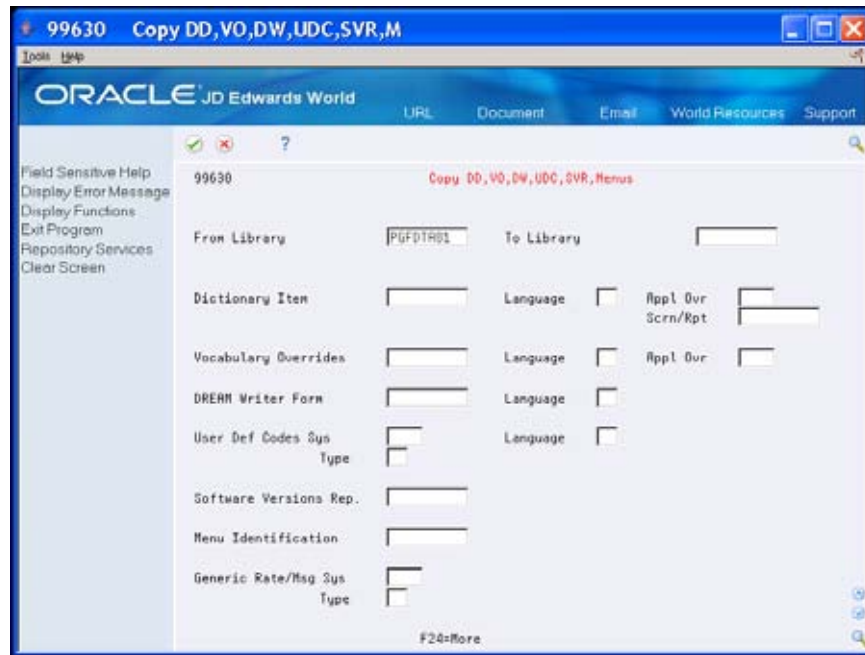
From Developer's Workbench (G9362), choose Copy DD, VO, DW, UDC, SVR, Menu

This selection is found on the Repository Services function key. Press F6 in any tool, for example Vocabulary Overrides, to display it.

This function allows you to copy members from one library to another. This is used most often when you have accidentally deleted something from your production environment and need to replace it from JDFDATA. It is also useful when creating an alternate environment to move selected members from the production environment to the alternate.

### To review copy DD, VO, DW, UDC, SVR, Menus

On Copy DD, VO, DW, UDC, SVR, Menus, copy the desired members from one library to another.



## Reviewing Vocabulary Override Field Lengths

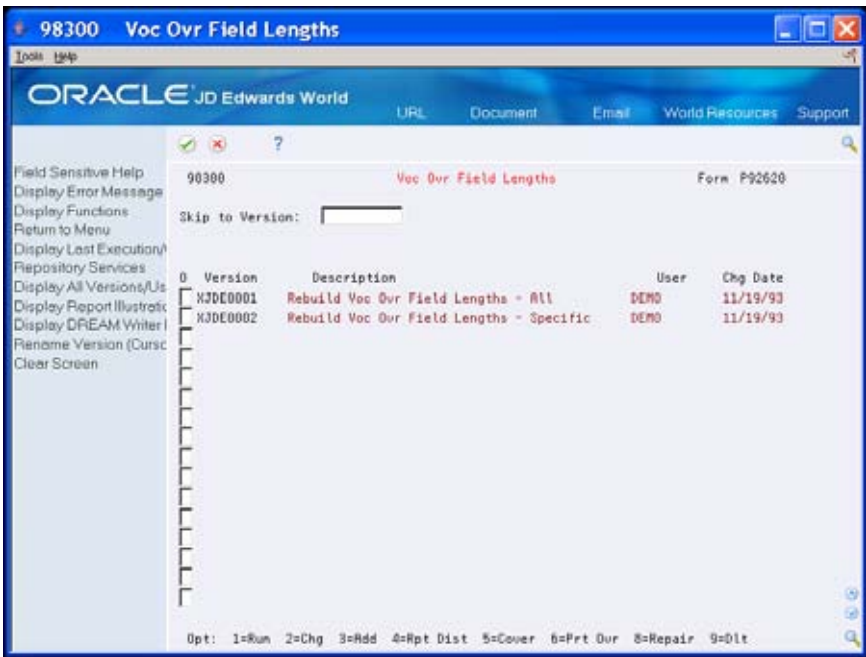
	<p>From Master Directory (G), choose <b>Hidden Selection 27</b></p> <p>From Advanced &amp; Technical Operations (G9), choose <b>Computer Operations</b></p> <p>From Computer Operations (G96), choose <b>Rebuilds &amp; Global Updates</b></p> <p>From Rebuilds and Global Updates (G9642), choose <b>Voc Ovr Field Lengths</b></p>
--	---

If you customize reports or forms through Report Design Aid or Screen Design Aid, run this update to update the field size.

Within the Vocabulary Overrides File (F9220), there is a Field Size field. This field represents how large the VTX field is that contains the description or text associated with a field.

Run this program for all Vocabulary Override records or a specific record.

You should make changes to field lengths carefully.







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## 14 Language and Jargon



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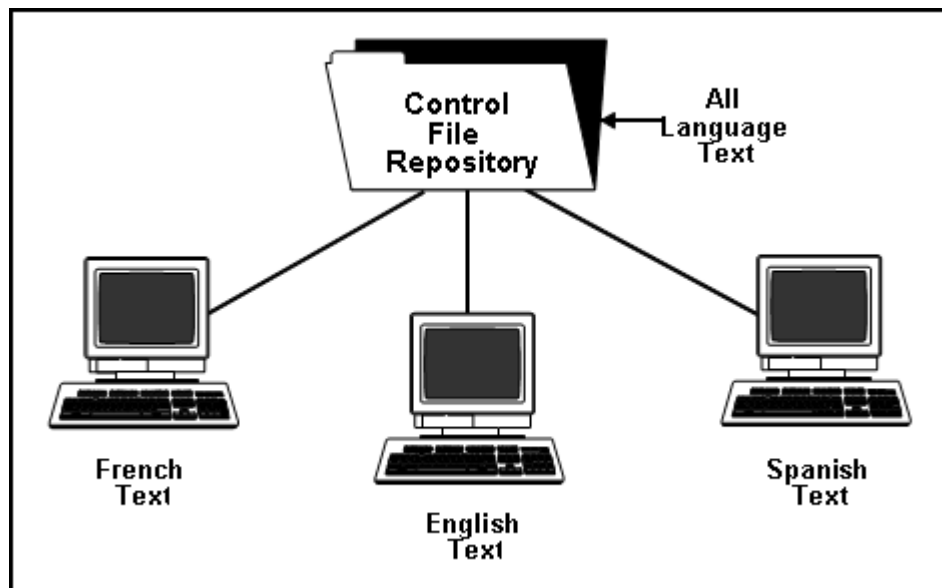
# Overview to Language and Jargon

## Objectives

- To understand how to change languages for screens, reports, function keys, and user defined codes
- To understand how to work with business jargon

## About Language and Jargon

JD Edwards systems can display forms from the same reporting code in different languages. You can view a form written in your preferred language. All language text is held in a central location. You can have multiple languages loaded into one environment.



Language codes are user defined and maintained in UDC table 01/LP. JD Edwards translates the software and documentation for the Tier 1 languages: Brazilian Portuguese, Chinese, French, German, Italian, Japanese, and Spanish. The software (only) is translated for the Tier 2 languages: Danish, Dutch, Norwegian, and Finnish. Business Partners are responsible for Tier 3 languages such as Russian, Arabic, Hungarian, Czech, Polish, and Greek.

All systems are shipped with a base language of English. You can install other languages using the language upgrade process. Refer to the *A9.1 Language Upgrade Guide* for details on installing an alternate language.

## Where is the Language Field?

You'll find the language fields on the following screens:

- QJDF Data Area
- User Display Preference
- Menus
- User Defined Codes
- Function Key Definition
- Data Dictionary
- Vocabulary Overrides
- DREAM Writer
  - Version titles
  - Processing options

Complete the following tasks:

- Set up a language for a system or user
- Change language descriptions and glossaries
- Add a translated title for DREAM Writer
- Work with DREAM Writer translate processing
- Work with business jargon
- Review the language and jargon search process

---

# Set Up a Language for a System or User

## Overview

### About Setting up a Language

This section contains the following:

- [Setting Up a System Language](#)
- [Setting Up a User Language](#)
- [Creating Language-Specific Menus](#)
- [Setting Language-Specific User Defined Codes](#)
- [Setting Language-Specific Function Keys](#)

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**Note:** In order to utilize alternate languages, other than English, you must first install the appropriate language tapes. Then proceed to set up a language on the system.

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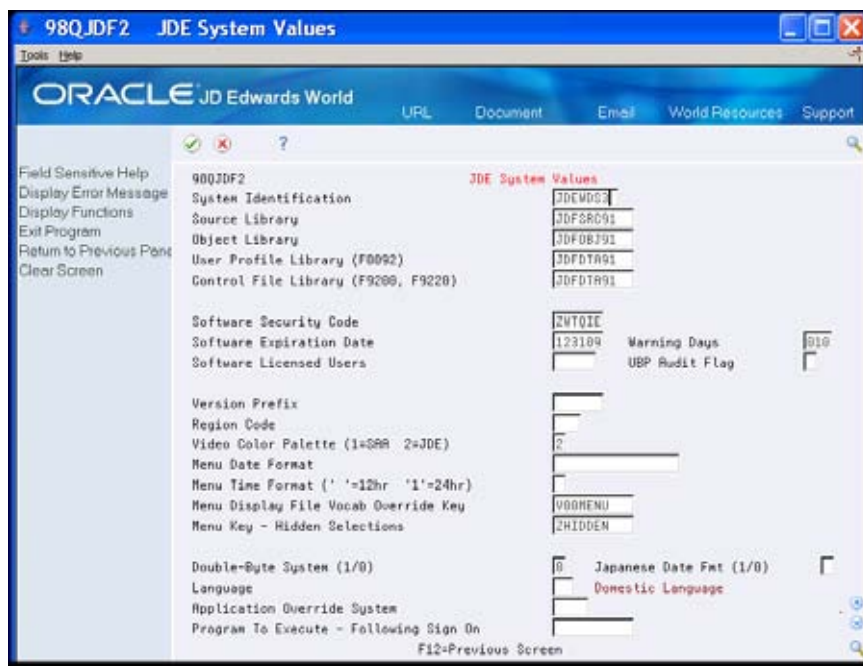
### Setting Up a System Language



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **JD Edwards World System Values**

#### To set up a system language

1. On the message screen, press F6.



2. On JD Edwards World System Values, in the QJDF data area, set up a system language. This language becomes your base language.

## Setting Up a User Language

	<p>From Master Directory (G), choose <b>Hidden Selection 27</b></p> <p>From Advanced &amp; Technical Operations (G9), choose <b>Security Officer</b></p> <p>From Security Officer (G94), choose <b>User Information</b></p>
--	---

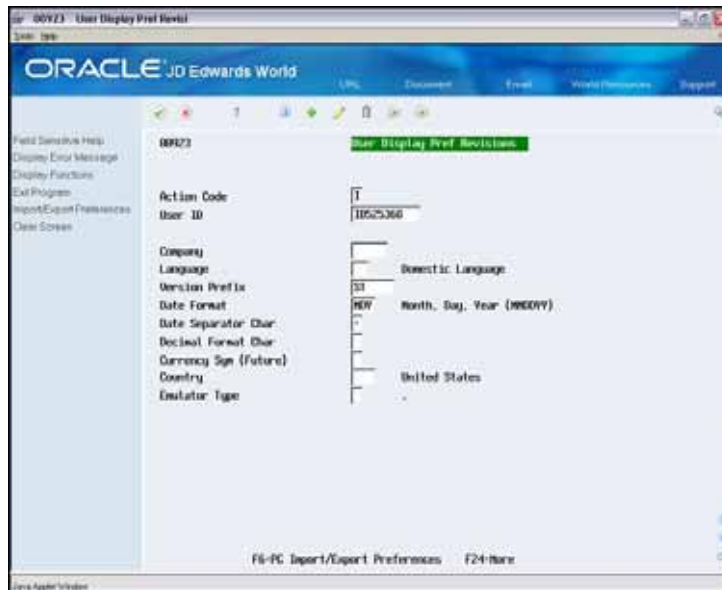
On User Display Preferences Revisions, you set up a language for each user. Either add a record for each user profile or change an existing record. Press F1 in the language field to view a list of available language codes. If available, menus and screens display in the user's preferred language. You must perform these steps in each environment where you need to change the language.

You must sign out of the environment and sign back in for the changes to take effect.

Hidden selection 85 will also display user defaults.

### To set up a user language

On User Information, access User Display Preferences Revisions (F6).



## Creating Language-Specific Menus



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **Menus**  
 From Menus (G901), choose **Revisions**

## To create language-specific menus

1. On Revisions, choose Menu Translation (F15) to display the Menu Text Translation screen.

2. If not displayed from Revisions, enter the menu ID of the menu you want to translate.

The base language displays on the left side of the screen and the alternate language displays on the right side of the screen.

3. Complete the following fields.

- Language
- Title

4. Customize the menu with the language.

Choose Other Selections (F5) to toggle between rows 1 through 12 and 13 through 24.

5. Add the menu.

## Setting Language-Specific User Defined Codes

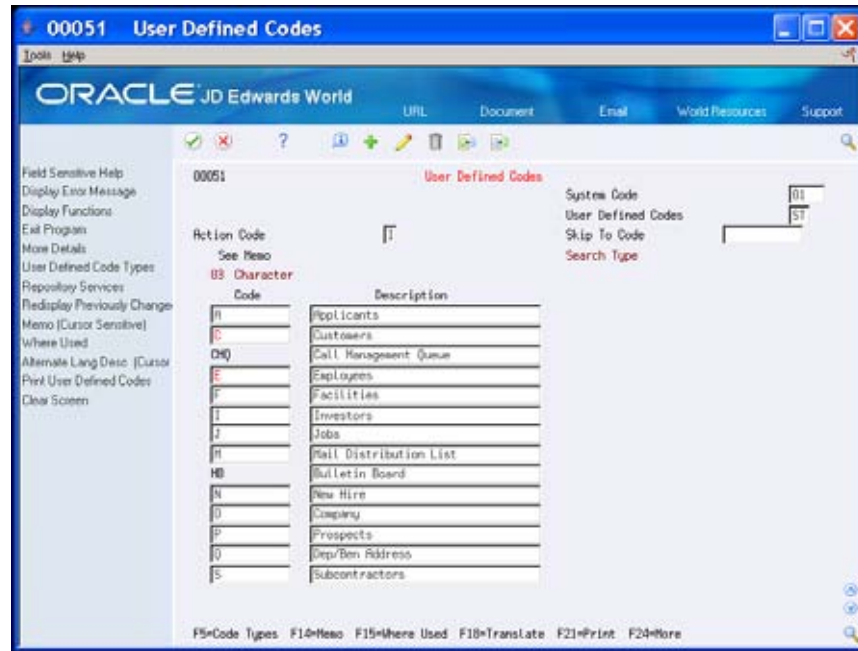


From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **User Defined Codes**

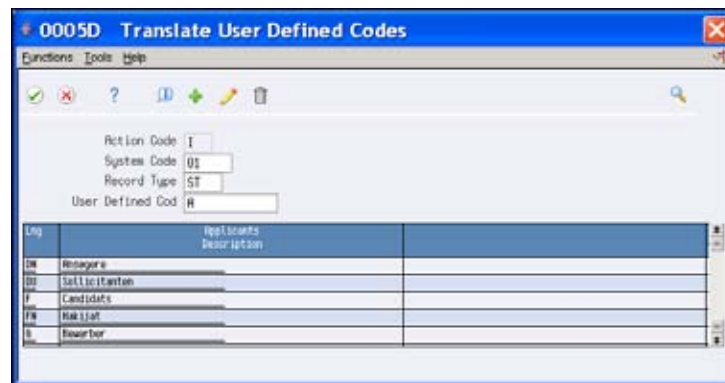


## To set language-specific user defined codes

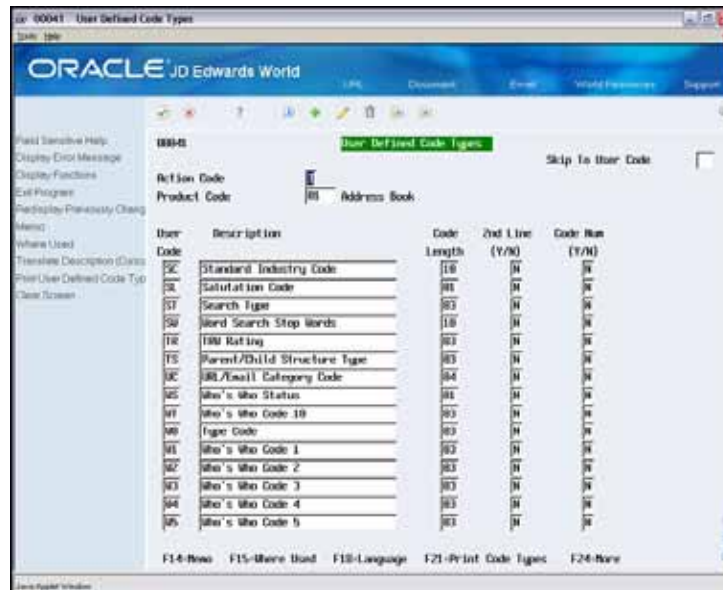
1. On User Defined Codes, locate the user defined codes for which you want to set as language specific.



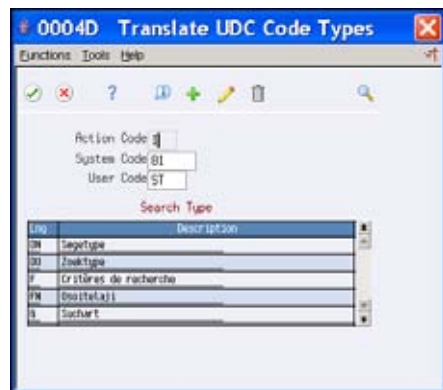
2. Place the cursor next to the code you want to translate and choose Alternate Language Description (F18).



3. On User Defined Codes, choose User Defined Codes Types (F5) to change descriptions on User Defined Codes Types.



4. To translate the description, place cursor on the appropriate code and choose Translate Description (F18).



5. Enter language code and translated description.

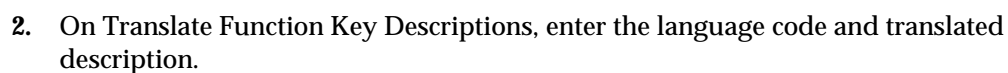
## Setting Language-Specific Function Keys

	<p>From Master Directory (G), choose <b>Hidden Selection 27</b></p> <p>From Advanced &amp; Technical Operations (G9), choose <b>Run Time Setup</b></p> <p>From Run Time Setup (G90), choose <b>Function Key Definitions</b></p>
--	---

Use the Translate Function Key Description functionality to change the language in the function key screen that displays when you press F24 from a screen.

### To set language-specific function keys

1. On Function Key Definitions, place the cursor next to the description you want to translate and choose Translate Description (F18).





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# Change Language Descriptions and Glossaries

## About Changing Language-Specific Descriptions and Glossaries

Through Data Dictionary, both descriptions and Glossary text can be changed to use appropriate language text.

- Descriptions for the data item in DREAM Writer reflect the appropriate language.
- F1 help is specific to the user preference.

You can also enter jargon or screen/report specific text, but not jargon and screen/report text.

When changing Glossary Text:

- The last two spaces on any text line must be left blank.
- You must also change the Description field to correspond with the glossary text you are using. For example, if you are adding a French version of the Business Unit field, you can translate the text in the Description field. This text displays in the upper left corner of the glossary text screen.
- If you fill an entire screen with text, page up and page down to display a blank screen.
- You can use F19 and F20 to scroll through the different glossary text entries. These function keys scroll through all glossary variations of one data item, then display the next data item.

This section contains the following:

- [Changing Data Dictionary Descriptions](#)
- [Changing Data Dictionary Glossary Text](#)
- [Setting Language-Specific Screens or Reports](#)

## Changing Data Dictionary Descriptions




From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **Data Dictionary**



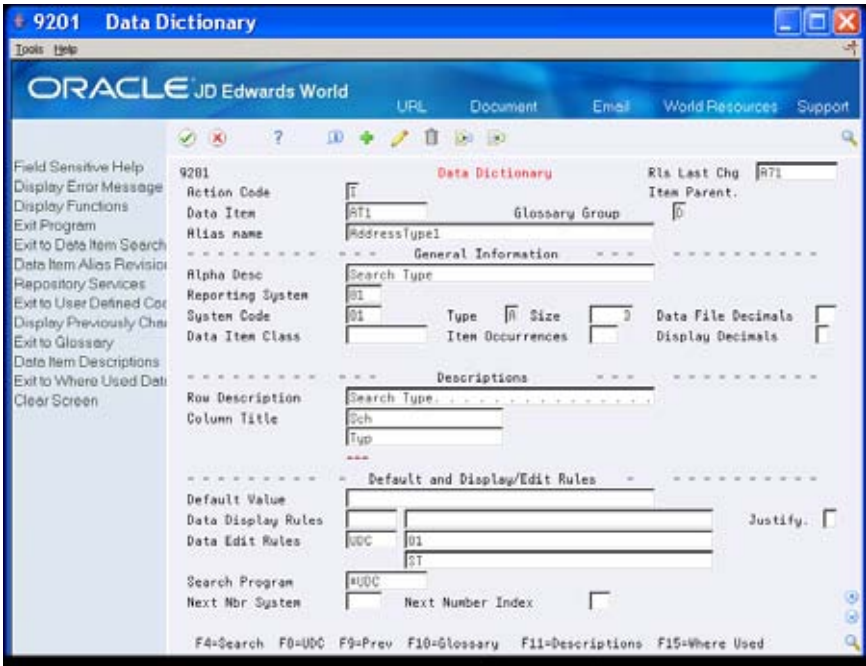
- Column Titles
4. Page down to locate additional language entries.

## Changing Data Dictionary Glossary Text

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Run Time Setup</b> From Run Time Setup (G90), choose <b>Data Dictionary</b>
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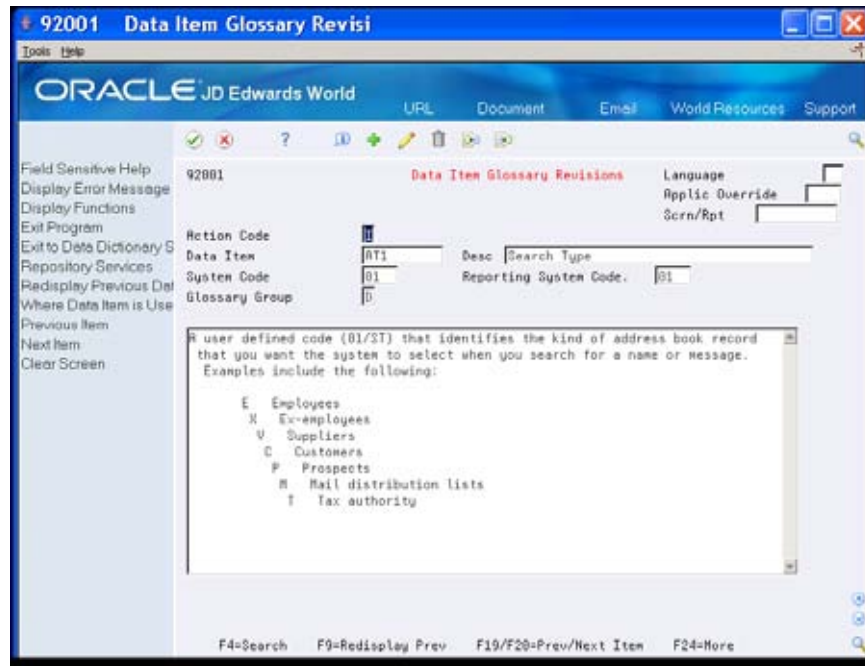
### To change Data Dictionary glossary text

1. On Data Dictionary, choose Exit to Glossary (F10) to change glossary.



2. On Data Item Glossary Revisions, enter the data item, language code and the text.





3. Click Add.

## Setting Language-Specific Screens or Reports



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **Vocabulary Overrides**

### To set language-specific screens or reports

1. On Vocabulary Overrides, enter a new Vocabulary Override record with the appropriate language code.
2. Before creating a new translated screen, you must do one of the following:
  - Create the translated equivalent in the Data Dictionary for each data item on the screen. For example, if you wish to translate the Name Search screen into French, each data item found on the Name Search screen must have a French translation in the Data Dictionary Repository.

If you go into the Data Dictionary Repository and translate each data item appearing on the screen, when you add a translated record the system automatically finds the data items and adds the new translated screen. No other action is necessary.

- Enter Y in the OR field on the Vocabulary Overrides screen of each data item on the screen to indicate your translation overrides the original screen.

If you do not translate the data items, and do not enter Y in the OR field, the system sends you an error and does not add the new screen.



When you translate a screen, the system creates an additional screen record, with the language as the key. For example, if you translate V01200, the Name Search screen, into French, you create a French V01200.

If you want to indicate your translation overrides the original screen, complete the following steps:

**9220 Vocabulary Overrides**

Oracle JD Edwards World

Tools Help

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Repository Services  
Display Previous Record  
Browse SDA/RDA  
Function Key Translation  
Clear Screen

9220 Vocabulary Overrides Language  
Applicable Override

Action Code: V01200  
Screen/Report: Name Search  
Default Title: Name Search

Skip to Field:   
Help: Start: P01200  
Help: End: P01200

Error Text for Line 24: [Blank]

Special Exits Message: [Blank]

Text Description	Data Item	U	C	Pos	Scr	Fld	Size
Alpha Name . . . . .	ALPH				001		14
Search Type . . . . .	RTI				002		16
Person/Corp. . . . .	PTXC				003		16
OP	SELC				004		2
Alpha Name	ALPH				005		
Mailing Name	MLNM				006		
Address Line 1	ADD1				007		
City	CTY1				008		
Phone Number	PH1				009		
RD #	RND				010		4
Alt Key	ALKY				011		8

F13-Browse SDA/RDA F16-Function Key Trans F9-Display Previous F24-More

3. On Vocabulary Overrides, enter the Language code in the upper right corner of the screen.
4. Enter Y in the OR field.
5. Click Add.



---

# Add a Translated Title for DREAM Writer

## Adding a Translated Title for DREAM Writer

In DREAM Writer, you can have language specific descriptions on the version ID screen and processing options. The system uses data item descriptions with the appropriate language on the Selection and Sequencing screens.

The Language field for DREAM Writer versions displays on the Version Identification screen.

### To add a translated language title for DREAM Writer

1. From the DREAM Writer Version list, select or add your version.
2. Access the Version Identification screen.

Version	Description	User	Chg Date
X3DE0001	One Line per Address	DEMO	03/28/96
X3DE0002	Full Address w/o Codes, Notes	DEMO	03/28/96
X3DE0003	Full Address w/ Codes, Notes	DEMO	03/28/96
X3DE0004	One Line per Address W-9 Exceptions	DEMO	03/28/96
X3DE0005	Mailing Labels, State of Colorado	DEMO	03/28/96
X3DE0006	Full Address Type Code T, Person/Corp N	DEMO	09/02/99

3. On Version Identification, in the Language field, enter the desired language code. Enter any changes to the text. The system adds a title record to the version.
4. Click Add.



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# Work with DREAM Writer Translate Processing

## Working with DREAM Writer Translate Processing



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **DREAM Writer**  
From DREAM Writer (G81), choose **Processing Options Set-up**

Translate DREAM Writer processing options into alternate languages through the Processing Options Setup screen. When you translate the processing options into another language, you add a record that relates the language code and the screen you are translating. For example, if you translate processing options for Screen ID P09101, Journal Entry, into French, you have two processing options text records, one in the default language and one in French.

The language of the processing options that display on a screen is dependent upon the language you specify either at the system level or the user level.

On Processing Options Set-up, you can:

- Put your cursor on the original option text and page up and page down to display additional text.
- View the translated processing options by choose Review Processing Options (F10).

### To work with the DREAM Writer translate processing options

1. On Processing Options Set-up, choose Language Preference Text (F18) to display Processing Options Setup.



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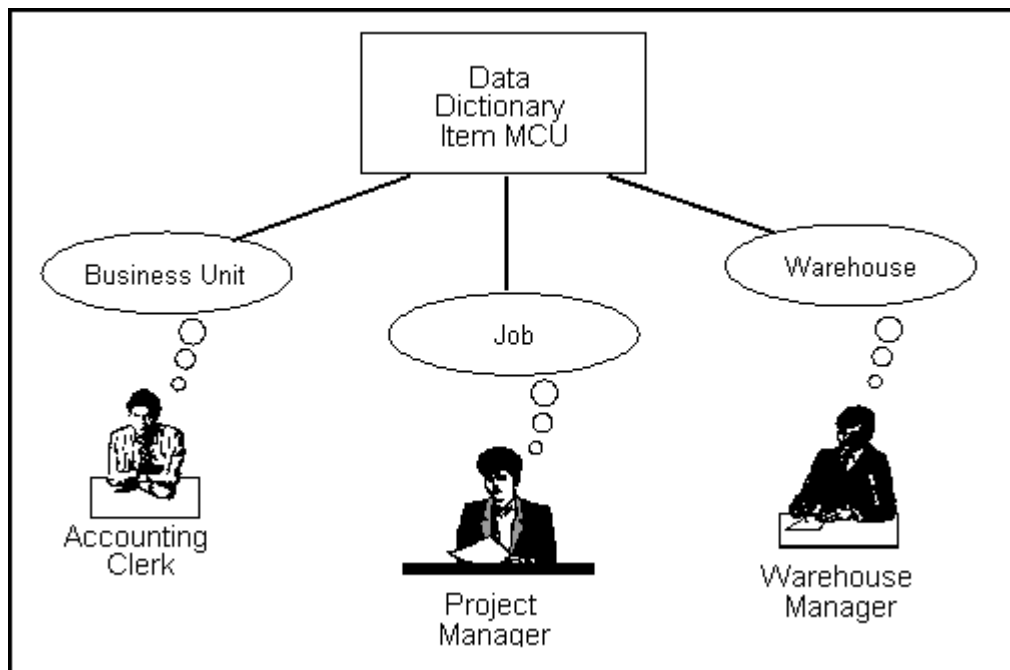
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# Work with Business Jargon

## About Business Jargon

JD Edwards World systems also have the capability to display many different views of the same data item (field). One data item may have different meanings in different applications. Business jargon makes it possible for a data item to have a specific description, based on the reporting system code.

Different views of the same item:



To identify the application system code to use in Jargon (the Application Override or Application Override System field), you use UDC table 98/SY.

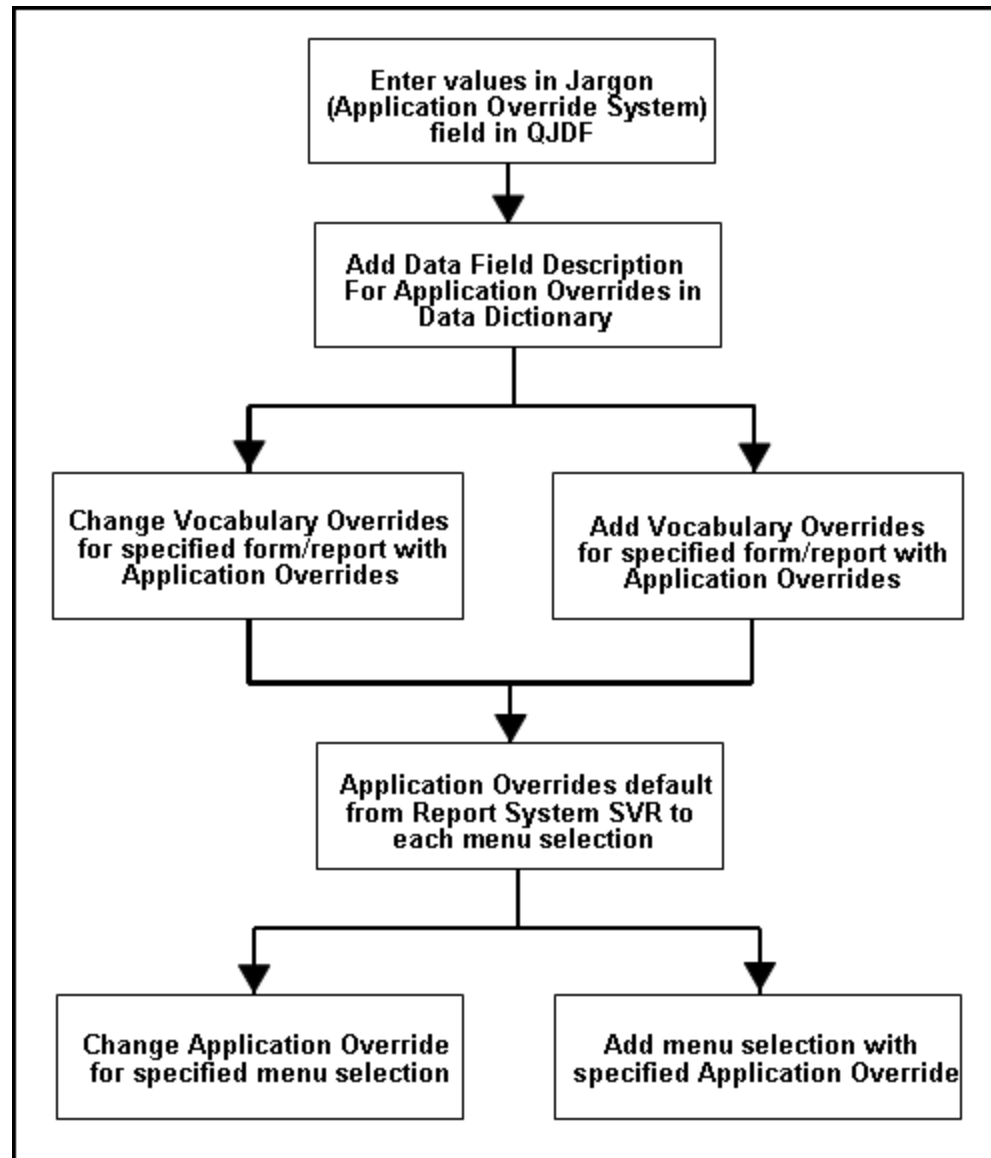
## Where is the Jargon field located?

Jargon (Application Override field) is found in the following:

- Menus
- Data Dictionary
- Vocabulary Overrides
- Software Versions Repository

## Working with Business Jargon on Screens and Reports

The following is a flow of using jargon on screens and reports:



To work with jargon on screens and reports



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Security Officer**  
 From Security Officer (G94), choose **JD Edwards World System Values**

1. Press F6 on the message screen.
2. On JD Edwards World System Values, press Enter.
3. On JD Edwards World System Values, complete the following field:



- Application Override System

Adding jargon to QJDF is optional. It is necessary when the organization plans on using one system's terminology throughout their entire software.

- Add data field descriptions for the application override in the Data Dictionary by choosing Data Dictionary from the Run Time Setup menu (G90).

- On Data Dictionary, choose Data item Descriptions (F11) to change descriptions.

**9202 Data Field Descriptions**

Oracle JD Edwards World

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Repository Services  
Redisplay Previous Data Item  
Previous Data Item  
Next Data Item  
Clear Screen

9202 Data Field Descriptions

Action Code: T  
Data Item: POU Business Unit  
Row Description: Business Unit  
Column Title: Business  
Unit

0	Lnq	Appl	Over	Description	Column Titles
			15	Row Property/Building	Property/Building
			30	Row Branch/Plant	Branch
			40	Row Branch/Plant	Plant
			41	Row Branch/Plant	Branch
					Plant

Opt: 5= Glossary F9= Redisplay Prev F10/20= Prev/Next Item F24= More

6. Enter an Application Override with description and column title.
7. From Run Time Setup (G90), choose Vocabulary Overrides.

**9220 Vocabulary Overrides**

Oracle JD Edwards World

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Repository Services  
Display Previous Record  
Browse SDA/DA  
Function Key Translations  
Clear Screen

9220 Vocabulary Overrides

Action Code: T  
Screen/Report: A03105  
Default Title: Accounts Receivable Entry  
Skip to Field: P03105  
Help: Start: P03105  
Help: End: P03105

Error Text for Line 24: \*SFE

Special Exit Message: F3=Detail F6=E-Mail F9=NS F11=Addr Book F16=Ldgr Inq F19=J.E. Inq F24=More

Text Description	Data Item	0	C	Pos	Scr	Fld	Size
Prev Invoice	#INV					001	13
Action Code	ACTION					002	10
Tax Amount	STAH					003	10
Account Number	#HS					004	18
Invoice Number	#OC					005	10
Business Unit	POU					006	10
Invoice Amount	#GRS					007	10
P.O. Number	PD					008	10
Invoice Date	DI					009	18
Serv/Tax Date	PSV					010	10
G/L Date	DG					011	10

F13=Browse SDA/PDR F16=Function Key Trans F9=Display Previous F24=More

8. On Vocabulary Overrides, add the appropriate Application Override.  
The system retrieves the repository system code from Software Versions Repository for the default Application Override for each menu selection.
9. From Menus (G901), choose Revisions.

**00908 Revisions**

Oracle JD Edwards World

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Skip To Selection  
Update with Redisplay  
Browse Other Menu(s)  
Repository Services  
Menu Search  
Global Menu File Update  
Menu Translation  
Menu Synonyms  
Single Byte Desc (Double Byte)  
Menu Security Review  
Clear Screen

00908  
Action Code  
Menu Id  
Menu Title  
Advanced/Tech  
Menu Class  
System Code  
Selection  
Job to Execute  
Menu to Execute  
Option Code  
Appl. Override  
Description  
Batch  
Help Init Key  
Option Key  
Run Time Msg  
Lock  
Level of Display  
Highlight  
Sel Lock  
Version  
Entry/Reg

1. MANUFACTURING  
2. Product Data Management  
3. Engineering Change Management  
4. Product Costing  
5. Shop Floor Management  
6. Repetitive Manufacturing  
7. Manufacturing Accounting  
8. Quality Management  
9.  
10. CONFIGURATION PROCESSING  
11. Configurator Operations  
12.

13. FORECASTING & PLANNING  
14. Resource & Capacity Planning  
15. Material Planning  
16.  
17. OTHER MENUS  
18. Inventory Management  
19. Warehouse Management  
20. Sales Order Processing  
21. Procurement  
22. Equipment/Plant Management  
23.  
24.

F4=Skip To F5=Updt u/Redisplay F6=Browse F10=Security Review F9=Search

10. On Revisions, change or add the menu selection with the specified application override.
11. Change the selection to reflect the Application Override to use.



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# Review the Language and Jargon Search Process

Define the Language field in the User Preference (F00921) file and in the QJDF data area. Define jargon (Application System Code) in the QJDF data area and in a menu selection.

When a user accesses a form, the program searches for a form with the appropriate keys, based on form name, language, and jargon.

## User

- Form ID, Language User (F00921), Jargon QJDF
- Form ID, Language User, Jargon Menu
- From ID, Language User, Jargon Blank

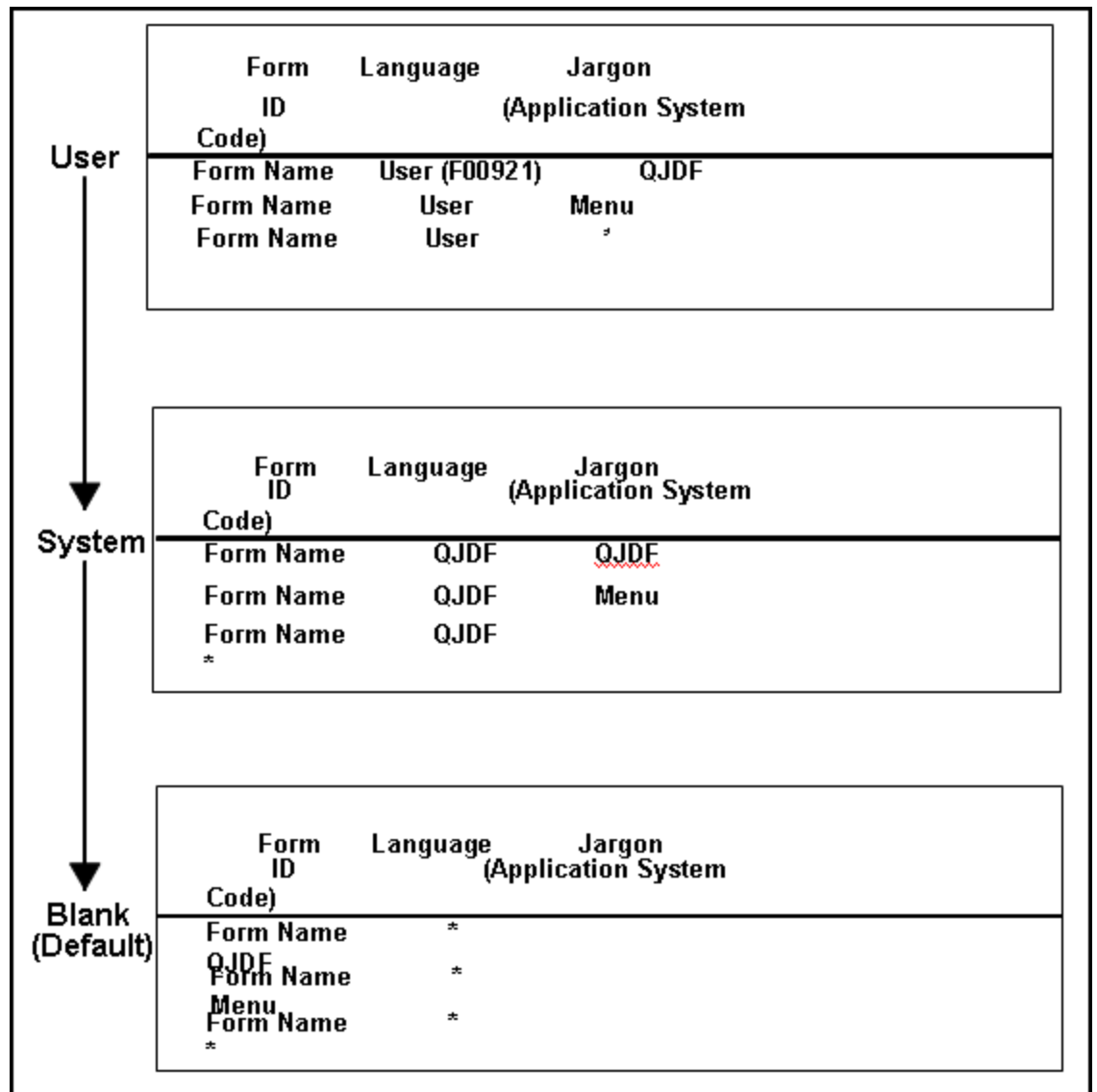
## System

- Form ID, Language QJDF, Jargon QJDF
- Form ID, Language QJDF, Jargon Menu
- From ID, Language QJDF, Jargon Blank

## Blank (Default)

- Form ID, Language Blank, Jargon QJDF
- Form ID, Language Blank, Jargon Menu
- From ID, Language Blank, Jargon Blank

The following is a chart of the order in which keys are selected:



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## **15 JD Edwards World Security**





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# Overview to JD Edwards World Security

## Objectives

- To understand how to set up security for users and groups
- To understand how to review user security

## About JD Edwards World Security

There are many types of security within JD Edwards World software. You can use security features to:

- Set up security by user ID
- Create groups based on similar job requirements
- Restrict users to access certain menus or menu selections
- Determine if users can add, change, or delete
- Secure records in master files by business unit
- Disable certain function keys or selection options
- Disable changes to User Defined Codes
- Restrict Address Book records by search type
- Restrict approval and posting of batches to certain users
- Assign DREAM Writer version security globally

Complete the following tasks:

- Set up user and group security
- Understand Menu Masking using menu locks
- Set up Action Code security
- Work with Business Unit security
- Work with Function Key security
- Set up User Defined Codes security
- Set up Name Search Type security
- Set up Batch Approval / Post security
- Set up Report Version security for DREAM Writer
- Change user profile ownership

- Review user security

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# Set Up User and Group Security

This section contains the following:

- [Setting Up User Security](#)
- [Securing Command Entry](#)
- [Setting Up Group Security](#)



From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>User Information</b>
--

## Setting Up User Security

Set up user security to restrict users from certain features. For example, an AP clerk might access an initial custom menu, but cannot use command entry, menu traveling, or fast path. User security offers the following:

- User keys used in conjunction with menu locks for menu masking
- Initial menu to execute
- Menu traveling
- Command entry
- Fast path
- User class/group

**0092 User Information**

Oracle JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
User Display Preferences  
Display Library List  
Library List Inquiry  
Hard Copy  
Clear Screen

0092 User Information Action Code

User ID: 0092 Group Profile

User Key: A J K DP F

Initial Menu to Execute: [ ]

Initial Program to Execute: [ ]

User Security: [ ]

User Type: [ ]

User Class/Group: [ ]

Batch Job Queue: [ ]

Job Scheduling Priority: [ ]

Logging (Level/severity/messages): [ ]

Output Queue: [ ]

Optional Printer File Library: [ ]

Current Library: [ ]

Employee Address Number (PPH): [ ]

Set Attention Program: [ ]

Allow Command Entry (Y/N): [ ]

Allow Menu Traveling (Y/N): [ ]

Allow Fast Path (Y/N): [ ]

FB=Display/Language F9=Library Inquiry F21=Print Lib List F24=More

Field	Explanation
Authorization Mask	<p>Complete with a user-defined value. This field exists in the JD Edwards World user profile and within each menu and menu selection. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. Comparison of the values in the user profile and the menu lock is hierarchical.</p> <p>A blank represents the highest level of authority. A through Z are the next levels, then 0 through 9. The user's value must be greater than or equal to that of the menu lock in the corresponding menu field to access the menu.</p>
Job Mask	<p>Complete with a user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.</p>
Knowledge Mask	<p>Complete with a user-defined value. This field exists in the JD Edwards World user profile and within each menu and menu selection. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. Comparison of the values in the user profile and the menu lock is hierarchical.</p> <p>A blank represents the highest level of authority. A through Z are the next levels, then 0 through 9. The user's value must be greater than or equal to that of the menu lock in the corresponding menu field to access the menu.</p>

Field	Explanation
Department Mask	Complete with a two-character, user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.
Future Use Mask	Complete with a user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.
Initial Menu to Execute	The specific menu to be executed as a selection on a menu.
Initial Program to Execute	<p>The specific job or program number to be executed. In the interest of consistency, all programs set up on a menu are executed via Control Language (CL). There are, therefore, only two types of jobs to execute - menus and jobs. Programs are never executed directly from the menu as they must be enclosed in CL. Job numbers always begin with a J followed by the job number. Menu numbers are always preceded with an asterisk (*). For example:</p> <p style="padding-left: 40px;">J01011 — Address Book Information</p> <p style="padding-left: 40px;">*A01 — Address Book Menu</p> <p>Never call a program directly such as: P01011 — Address Book Information</p>
Allow Command Entry	<p>Used to control use of command entry in the JD Edwards World menu program for an individual user. You must also alter the IBM User Profile and Hidden Selections to eliminate a command line.</p> <p>This data field allows the values of blank, Y or N.</p> <p>Y     indicates the user has command entry.</p> <p>N     indicates the user does NOT have authority to command entry.</p>
Allow Menu Traveling	<p>Used to control menu traveling within the JD Edwards World menu program for an individual user.</p> <p>This data field allows the values of blank, "Y" or "N".</p> <p>blank Indicates the user is allowed to menu travel.</p> <p>Y     Indicates the user is allowed to menu travel.</p> <p>N     Indicates the user is NOT allowed to menu travel.</p>

Field	Explanation
Allow Fast Path	<p>The Fast Path flag is used to specify whether individual users may use the “Fast Path” method of processing within the JD Edwards World menu program.</p> <p>This data field allows the values of blank, Y or N.</p> <p>blank user is allowed to use fast paths</p> <p>Y user is allowed to use fast paths</p> <p>N user is NOT allowed to use fast paths.</p>

## Securing Command Entry

Securing command entry on the User Information screen changes your display on JD Edwards World screens. The Command line changes to the Selection line.

---

**Note:** This does not secure Command Entry on IBM screens.

---

### To secure Command Entry on IBM screens

1. Use Menu masking to hide Hidden Selection 36 — Command Entry.
2. Set the Allow Command Entry field to 'N' on the User Information screen.
3. Set the Limit capabilities to \*YES in the IBM user profile.

---

**Note:** When the Limit Capabilities field is set to \*YES on the IBM User Profile it overrides a Y setting in the Allow Command Entry field in the User Information program (P0092) on the Security Office menu (G94). This restricts the use of commands on the Command Line, Group Jobs, and Software Versions Repository (SVR) (F2 in SVR). It is recommended that you review all IBM user profiles that access JD Edwards World software. Set the Limit Capabilities field to \*NO or \*PARTIAL to allow the user to run commands from these options. If some user's profiles have the Limit Capabilities field set to \*YES, then you can set up the system to allow them to execute certain commands by entering CHGCMD on the Command Line. For example, to allow users to execute the CHGOBJ command, enter CHGCMD CHGOBJ on the Command Line and then set the Allow Limit Users (ALWLMTUSR) field to \*YES.

---

## Setting Up Group Security

Group security is the ability to group users so that each individual takes on the characteristics of the group. Create groups based on similar job requirements. The name of the group must begin with an asterisk (\*). For example: If the group is \*AP assign each Accounts Payable clerk the group \*AP.

When you set up groups, certain security features are available that you can place on the group as a whole. You secure each member through the group.

Group security is active for:

- Business Unit
- Action Code
- Menu Locks
- Function Keys
- User Defined Codes

\*PUBLIC is considered a group profile. \*PUBLIC is not delivered with the system. Add \*PUBLIC to activate it. Once added, all users automatically are included.

## To set up group security

1. On User Information, add a group user profile with the following:

- User class/group field must be blank
- Name of group must begin with \*

The system does not require a corresponding IBM profile.

The screenshot shows the 'User Information' window for user 0092. The 'Group Profile' field is highlighted in red. The window includes a left-hand menu with options like 'Field Sensitive Help', 'Display Error Message', 'Display Functions', 'Exit Program', 'User Display Preferences', 'Display Library List', 'Library List Inquiry', 'Hard Copy', and 'Clear Screen'. The main area contains various fields for user configuration, including 'User ID', 'User Key', 'Initial Menu to Execute', 'Initial Program to Execute', 'User Security' (with sub-fields for User Type and User Class/Group), 'Batch Job Queue', 'Job Scheduling Priority', 'Logging (Level/Severity/Message)', 'Output Queue', 'Optional Printer File Library', 'Current Library', 'Employee Address Number (PPHT)', 'Set Attention Program', and a footer with function key shortcuts: F8=Display/Language, F9=Library Inquiry, F21=Print Lib List, and F24=More.

2. Add the following for the group profile:

- Menu Locks
- Action Code
- Business Unit
- Function Keys
- User Defined Codes

3. Add the group profile name to the User Class/Group field for each user ID in the group.

The screenshot shows the 'User Information' window for user ID 0092. The window has a blue title bar with '0092 User Information'. Below the title bar is a menu bar with 'Tools' and 'Help'. The main area is divided into two columns. The left column contains a list of functions: Field Sensitive Help, Display Error Message, Display Functions, Exit Program, User Display Preferences, Display Library List, Library List Inquiry, Hard Copy, and Clear Screen. The right column contains the user information fields. The 'User ID' field is set to 0092. The 'User Key' field is set to \*PCL390. The 'Initial Menu to Execute' field is set to R J K DP F. The 'Initial Program to Execute' field is set to \*JDEGROUP. The 'User Security' field is set to \*JDEGROUP. The 'User Type' field is set to \*JDEGROUP. The 'User Class/Group' field is set to \*JDEGROUP. The 'Batch Job Queue' field is set to \*JDEGROUP. The 'Job Scheduling Priority' field is set to 5. The 'Logging' field is set to 4. The 'Output Queue' field is set to \*JDEGROUP. The 'Optional Printer File Library' field is set to \*JDEGROUP. The 'Current Library' field is set to \*JDEGROUP. The 'Employee Address Number (PPHT)' field is set to \*JDEGROUP. The 'Set Attention Program' field is set to \*JDEGROUP. The 'FB=Display/Language' field is set to \*JDEGROUP. The 'F9=Library Inquiry' field is set to \*JDEGROUP. The 'F21=Print Lib List' field is set to \*JDEGROUP. The 'F24=More' field is set to \*JDEGROUP.

## How the System Checks User Security

The system checks security for each user in the following order:

1. System checks for the User ID in the security files.
2. If the system does not find the User ID, the system checks for the group profile.
3. If group profile is not defined for user or does not exist in the security file, \*PUBLIC is used.
4. If none of the above criteria are met, the user has total authority.



## 15-9

## What are the Types of Comparisons in Menu Masking?

There are two types of comparison in menu masking, they are:

Comparisons	Description
<b>Direct comparison</b>	This requires an exact match between the J, DP, or F fields both on the menu and in the user profile.
<b>Hierarchical comparison</b>	<p>This applies to the A and K fields. The comparison between the menu and user profile is based on the hierarchy of Blank, A-Z, and 0-9. The system evaluates the Blank being greater than A, which is greater than Z, which is greater than 0, which is greater than 9. 9 has the least authority.</p> <ul style="list-style-type: none"> <li>Blank in menu locks = no security on that menu or selection</li> <li>Blank in user key = all authority for the user</li> </ul>

The system compares each menu lock and user key field beginning with A, then J, K, DP, and F. The comparison must pass all five fields to allow access. If the system finds an instance that disallows access, the system stops the search and locks out the user.

When using fast path, the system checks both the menu and the menu selection for authority.

## An Example of Menu Masking

User/Menu Selection	A	J	K	DP	F
Student (user)	B			AR	
Menu Selection #1	B			AR	(Allowed)
Menu Selection #2	B	A			(Allowed)
Menu Selection #3	C		C		(Allowed)
Menu Selection #4	A				(Disallow)
Menu Selection #5	B			AP	(Disallow)
Menu Selection #6	D			AP	(Disallow)

## Using Group Profile or \*PUBLIC with Menu Masking

### To use group profile or \*PUBLIC with menu masking

1. Add a \*PUBLIC profile to the User Information file. Enter user keys for the profile.
2. Place user keys in the appropriate group profile record.
3. Place any user keys in each individual user profile.

When using individual keys, group profile, or \*PUBLIC, the system creates a composite key. This key is a summary of all three user keys. When creating a composite key, the system checks the user keys first, then group, then \*PUBLIC for A. Then the system checks all three for J, and so on. As it reads vertically through each key, the first character it reaches becomes the entry for the composite key. In the user, group, \*PUBLIC scenario, blanks are irrelevant. The system compares the composite key with the menu locks to determine if it will allow access.

Profile	A	J	K	DP	F
User	B				
*JDEGROUP				AR	
*PUBLIC		R	A		
Key Created	B	R	A	AR	

An entry in the User field overrides an entry in the group profile and \*PUBLIC.  
An entry in the group field overrides an entry in the \*PUBLIC record.

Profile	A	J	K	DP	F
User	B			PR	
*JDEGROUP		P		AR	
*PUBLIC		R	A		
Key Created	B	P	A	PR	

To maintain blanks as the most authority, use an asterisk in the “key” field. Since the system finds the asterisks first, the asterisks are accepted into the composite key, maintaining the blank. Use an asterisk (\*) to override what is in the group profile or in \*PUBLIC. Since the DP field is a two-character field, you must use two asterisks (\*\*).

**Note:** This type of setup can become complicated. If you use this method, create a written plan before implementation.

- Use the \*PUBLIC entry as the base.

- Place additional securities needed in group profiles.
- If the user has additional security needs, place entries in the user record.

## Securing Hidden Selections

Hidden selections are secured in the same way as menu selections. The Hidden Selection menus are ZHIDDEN, ZHIDDEN002, and ZHIDDEN003.

Hidden selections 27 and 29 allow you to access the Advanced & Technical and Setup Operations menus.

The Hidden Selection Masks screen does not display selections that the user cannot access. You cannot secure the ZHIDDEN menus in their entirety, only the selections.


### Securing Hidden Selection 60 (HS60)

HS 60 allows a user to send a message that displays in the Send Window Message on the recipient's screen, to which they either reply or press F3 to exit. HS 60 is also referred to as a break message. HS 60 uses the IBM command SNDMSG.

Following are two different methods to restrict the use of HS 60 and the IBM command SNDMSG. You can:

- Set up the authority you require for the IBM SNDMSG command using GRTOBJAUT.
- Use menu security on ZHIDDEN003 to prevent the use of this selection by those without the correct menu privileges. Alternatively, you can delete the menu entry for HS 60.

### Preventing Users from Receiving a Send Window Message

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>Library List Control</b> From Library List Control (G944), choose <b>Pre-open Files Setup</b>
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You can set up the system to prevent users from receiving a Send Window Message. Users continue to receive messages, but must access their message queue using HS 34 or the IBM command DSPMSG

#### Before You Begin

Determine whether the user is part of a specific User Type by accessing the User Information Revisions program (P0092N) on the Security Officer menu (G944). Alternatively, you can access the User Information program (P0092) on the Security Officer menu (G94).

#### To prevent a user from receiving a Send Window Message

1. On Pre-open Files Setup, if the user is part of a specific User Type, locate that User Type.

2. If the User Type contains the J96MSGQ or J96SETMSGQ files, delete those files.
3. Locate the \*SYS User Type.
4. If the User Type contains the J96MSGQ or J96SETMSGQ files, delete those files.

## Securing Hidden Selection 33 (HS33)



From Master Directory (G), choose **Hidden Selection 27**  
 From Advanced & Technical Operations (G9), choose **Run Time Setup**  
 From Run Time Setup (G90), choose **Menus**  
 From Menus (G901), choose **Revisions**

Hidden selection 33 allows a user to access the Work with Submitted Jobs screen and uses the IBM command WRKSBJOB. On the Work with Submitted Jobs screen, a user can enter the CHGJOB command to move jobs to a different queue or change priorities. You can have the WrkSbmJob Window (V00WSJ) screen display instead of the WRKSBJOB screen when you use the HS33 command. This allows you to enable Function Keys/Options security.

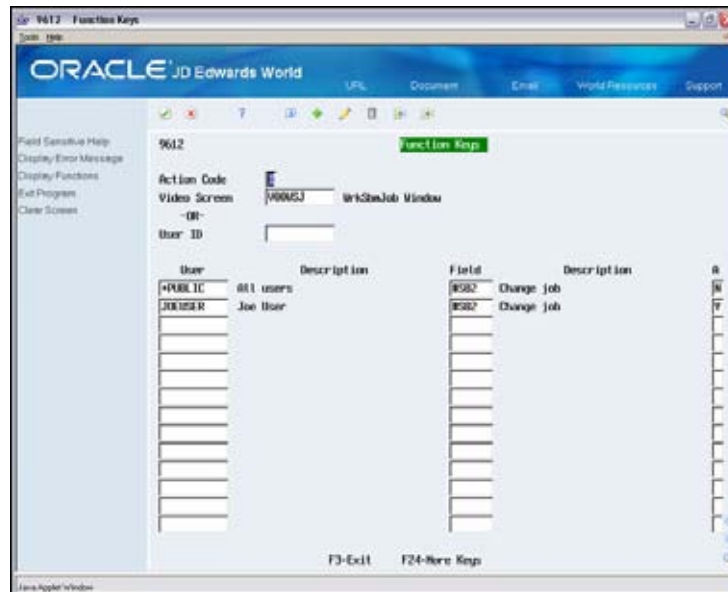
### Before You Begin

Ensure objects J00WSJ, P00WSJ, V00WSJ, and X00WSJ are in your JD Edwards World object library.

### To secure the use of HS 33

1. On Revisions, locate the ZHIDDEN menu ID with SELECT 33 (-Sel 33).
2. Enter J00WSJ in the following field:
  - Option Key
3. Sign out of the environment and sign in.  
 HS33 presents the WRKSBJOB information on V00WSJ.
4. From the Security Officer menu (G94), choose Function Keys.
5. On Function Keys, locate screen WrkSbmJob Window (V00WSJ) and set up security for the screen per your company requirements.

In the following example, no users can change jobs except Joe User.



## Considerations for Menu Masking

- Use menu illustrations as a worksheet.
- Use F8 word search or F18 security review to see menus that have a particular job or menu as a selection.
- Start with one or two fields.
- For users that have very limited access, create your own menu, make your menu the “Initial Menu to Execute” and set Allow Menu Traveling and Allow Fast Path fields to N in User Information.
- Restrict access to User Information, Menu Information and Command Entry.
  - Allow one user to have access: JD Edwards World Security Officer.
  - Where possible, create group profiles for users with similar job requirements.
- Avoid mixing both letters and numbers, particularly in hierarchical fields. Select either letters or numbers until it becomes necessary to use both. Mixing letters and numbers is very confusing.

## Troubleshooting Menu Security Setup

Use any of the following to troubleshoot a menu security issue:

- Use the Menu Locks program (P00908) on the Security Office menu (G94) to determine if the menu contains any locks in the header.
- Use the Menu Locks program (P00908) on the Security Office menu (G94) to determine if a menu option contains any locks.
- Use the User Information program (P0092) on the Security Office menu (G94) to determine if the user profile contains any user keys.

- Use the User Information program (P0092) on the Security Office menu (G94) to determine if the user profile contains a group profile. Locate the group profile to determine if it contains any user keys.
- Use the User Information program (P0092) on the Security Office menu (G94) to determine if the \*PUBLIC profile contains user keys.
- Determine if there is there more than one menu file (F0082).
- In a particular environment, determine if there is there more than one user profile file (F0092).
- Use the User Information program (P0092) on the Security Office menu (G94) to determine if the Allow Menu Traveling field is set to Y.





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# Set Up Action Code Security

## Setting Up Action Code Security



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **Action Code**

Action Code security allows you to secure any program that uses the field Action Code. You can restrict users from adding, changing and/or deleting on a Program ID basis. If Action Code security is not set up, users have access to all action codes. Enter either a User ID, specifying the programs and the authority that user has, or enter a Program ID, specifying the User ID and the authority.

When setting up Action Code Security for a new user, you can copy more than one page of an existing user's settings at a time. You must locate the existing user's Action Code Security settings and page down through the screens you want to copy. On the last screen, enter the new user ID. The new user's settings include all of the existing user's Action Code Security settings.

To determine which programs Action Code Security affects, you can use the SVR. To locate all programs, you must locate each of the following objects:

- C0001
- C0001A
- C0001T (A91)
- C0001L (ILE)
- C0001TL (ILE)

For each object, choose Where Used Cross Reference (F15) and enter / in the Type field and P in the To Display field to display the programs that use Action Codes.

To set up read only authority, you can use \*PUBLIC, \*ALL, N N N in the User ID field. Be aware that this changes all users to read only authority. In the Action Code program, first set up your user profile to \*ALL Y Y Y so that you do not lock yourself out of all of programs.

If you want to restrict a user profile from performing any specific action in all programs, you can use \*ALL in the program ID for that profile.

You cannot secure the CL program. You must use the RPG program, for example, P01051, P00201.

The Action Code security files are in the client data library.

## To set up Action Code security

1. Enter a user ID or program ID.

2. Complete the ID field.
3. In the Action Codes fields, enter Y to allow access, or an N to restrict access.

Field	Explanation
User ID	The JD Edwards World software user profile.
Program ID	The RPG program name defined in the Software Versions Repository Master table. See also JD Edwards Standards. T SS XXX T    Specific member ID number SS   System number, for example, 01 for Address Book XXX Member type, for example, P for Program, R for Report, and so on
ID	Enter the name of the user or file to secure. If a user was entered in the top half of the screen, enter a file name to secure for that user. If a file name was entered in the top half of the screen, enter a user name to secure for that file.
A (Add)	This code designates whether an operator has the authority to ADD records on revision screens that are using Action Code Security. The code is set up in Action Code Security Revisions (F0003). Enter Y or N.

Field	Explanation
C (Change)	This code designates whether an operator has the authority to CHANGE records on revision screens that are using Action Code Security. The code is set up in Action Code Security Revisions (F0003). Enter Y or N.
D (Delete)	This code designates whether an operator has the authority to 'DELETE' records on revision screens that are using Action Code Security. The code is set up in Action Code Security Revisions (F0003). Enter Y or N.
F (Import)	This code designates whether a user has the authority to import data using the PC Import process. This code is set up through Security Workbench by user or group for every table, application, or form requiring security. *ALL can be used to designate all tables or applications.
T (Export)	This code designates whether a user has the authority to export data using the PC Export process. This code is set up through Security Workbench by user or group for every table, application or form requiring security. *ALL can be used to designate all tables or applications.

## Troubleshooting Action Invalid Error Message

When a user attempts to add, change, or delete in a program where they do not have action code security set up they can receive the error message 0001- Action Invalid. Perform the following to resolve this issue:

Use the User Information program (P0092) on the Security Office menu (G94) to locate the user. Determine if the user profile contains a User Class/Group profile. Use the Action Code program (P00031) to locate the program number, for example, P0901. Determine the following:

- If the user profile appears in the User ID field, change the Action Codes A/C/D to reflect the security the user requires. You do not need to check the Group profile or \*PUBLIC.
- If the User Class/Group in this user profile appears in the User ID field, change the Action Codes A/C/D to reflect the security the users in this group require. If this affects only one user, add the user ID in the ID field and enter the appropriate security.
- If the \*PUBLIC profile appears in the User ID field, add the user with the appropriate security.
- If you cannot resolve the issue with any of the preceding scenarios, contact Oracle Global Support Services and request assistance from JD Edwards World Technical Support.



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# Work with Business Unit Security

## Working with Business Unit Security



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **Business Unit**

Business Unit security allows you to secure records in master files by Business Unit. You restrict users from viewing or entering information in Business Units.

## Setup Considerations for Business Unit Security

Consider the following before you set up Business Unit Security:

- This is a passive security mechanism. If you do nothing, there will be no business unit security. The level of security in all cases will check the user first, then group, and finally, \*PUBLIC. If none of these are specified, then it is assumed that the user has global authority to all files that contain Business Units.
- If you do not specify a particular file during setup, the system presumes the ranges of business units that you designate by User ID transcend all file boundaries. The same applies to group and \*PUBLIC records.
- Conversely, if you do specify a file, the ranges of business units listed are the only business units the user will be able to access. Anything that is not on their list the system secures.
- If user, group, and \*PUBLIC securities are setup on a particular file, the user ID record will override any security setup for a group. If a user record exists, the system never checks group security. However, if there is no user record for a particular file, the user does not necessarily have authority to that file. This person may be a member of a group or \*PUBLIC file with security for that file.
- Although JD Edwards does not recommend entering alphanumeric values, it is possible to use them for Business Units security. If you are setting up security for business units that are alphanumeric, you cannot mix the ranges with numeric data (AAA through 999). You must keep alphanumeric and numeric ranges separate (AAA through ZZZ and 1 through 999). However, you may include both types of ranges if you are trying to secure both numeric and alphanumeric business units. You may also enter alphanumeric ranges similar to A through ZZZZ. Each digit of the Business Unit on each side of the range must be the same character type. If the first digit on the From side is numeric, the first digit on the Thru side must also be numeric. If the second digit on the From side is

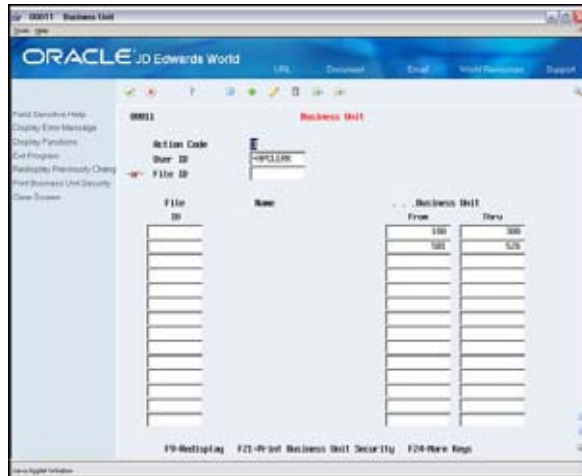
alpha, then the second digit on the Thru side must be alpha. The length of the Business Unit on each side must be the same.  
For example, a user can access Business Unit 72SP. You can enter security in two ways:

- Specify the exact business unit in both fields: From 72SP, Thru 72SP.
- Specify a range that includes that value: From 10AA, Thru 99ZZ.

72SP is not included in a range of 0000-ZZZZ.

72SP is not included in a range of AA-XX.

- The Business Unit security file is F0001 and is on the client data library.



- On Business Unit, in the Business Unit From and Thru fields, you can use a range of \*blanks to \*blanks.
- You cannot mix alphabetic and numeric ranges.

Field	Explanation
User ID	The JD Edwards World software defined user profile.
File ID	The member name of the file. All file names begin with F.
	Screen-specific information
ID	<p>The name of a specific table.</p> <p>Enter the name of the user or file that needs updating. If you enter a user in the top half of the screen, enter a file name to be updated for that user. If you enter a file name in the top half of the screen, enter a user name to be updated for that file.</p> <p><b>Note:</b> If inquiring on a specific ID, you must enter the Thru Business Unit number to retrieve the record since the system allows you to enter multiple Business Unit ranges.</p>
Name	The description of the member appearing in the ID field.

Field	Explanation
Business Unit From	The lowest value of the range a given user is authorized to view and process data. It is used in conjunction with the Business Unit Through Code which defines the highest value. If no record exists for a user and file, the user is completely authorized to the file. If the file name is blank for a given user, the Business Unit range setup applies to all users of the file.
Business Unit Thru	The highest value of the range a given user is authorized to view and process data. It is used in conjunction with the Business Unit From code which defines the lower range. If no record exists for a user and file, the user is completely authorized to the file. If the file name is blank for a given user, the Business Unit range setup applies to all files for the user.





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# Work with Function Key Security

## About Function Key Security



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **Function Keys**

Function Key security allows you to set up security on function keys and/or options by screen or user.

- Secured function keys/options do not display in Available Functions/Options screen F24 or F1.
- Secured function keys still display on Line 24. Use Vocabulary Overrides to remove them.
- Use Function Key security to restrict menu level function keys. Use screen V00MENU.
- Use Data Dictionary item #JDEFNC to modify run-time text on \*ALL security.

The function key security file is F9612 and is in the common library.

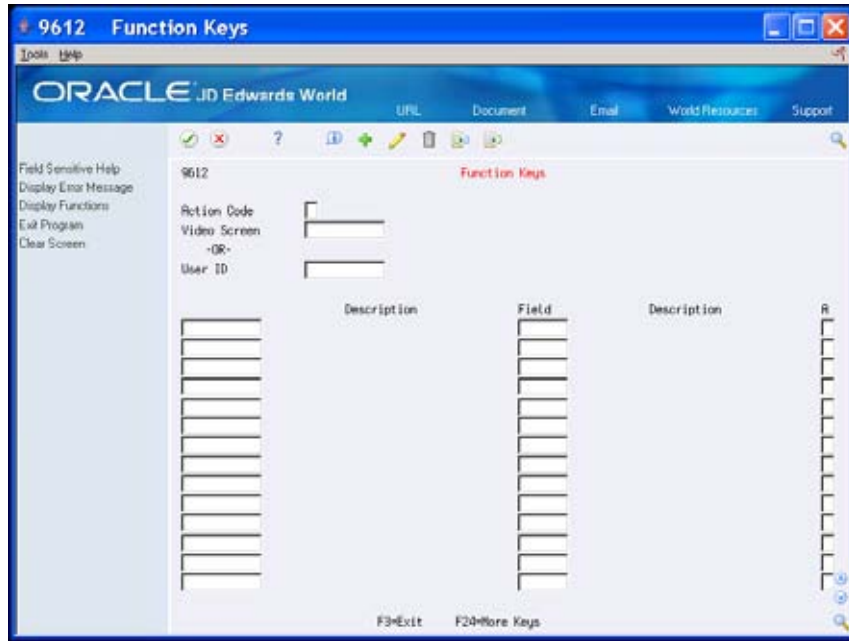
This section contains the following:

- [Working with Function Key Security](#)
- [Securing all but Standard Function Keys](#)

## Working with Function Key Security

### To work with Function Key security

1. On Function Keys, click Help (F1) in the Field field to get a list of all keys on a specific screen.



2. To restrict someone from an entire screen, enter the user or group name in the User ID field.

Field	Explanation
Video Screen	Screen or report file name (e.g., V01011 or R01402).
User ID	The JD Edwards World software defined user profile.
User or Screen	Enter the name of the user or video that needs updating. If you enter a user in the top half of the screen, enter a video name to be updated for that user. If you enter a video name in the top half of the screen, enter a user name to be updated for that file.
Description	The description of the selected video screen or user ID.
Field	<p>The name of the field within the file. This name is constructed using the File Prefix specified in the SVR and the data item name in the data dictionary.</p> <p><i>Screen-specific information</i></p> <p>The RPG field name of the function key or selection exit. Function keys exits are prefaced with #F, selection keys are prefaced with #S, and the user-defined function keys are prefaced with #G. Output only.</p>
Description	The PF01 field name of the function key or selection exits.
A	<p>A code that indicates whether a user is allowed access to the function key or selection. Valid codes are:</p> <ul style="list-style-type: none"> <li>Y Yes, allow access</li> <li>N No, prevent access</li> <li>Blank Yes, allow access (default)</li> </ul>

## Securing all but Standard Function Keys

### To secure all but standard function keys

The standard function keys are F1, F3, F7, F24, Help, and the roll keys.

1. On Function Keys, enter a screen ID in the Video Screen field, such as V01051 — Address Book Information.
2. Add \*PUBLIC or a group profile record with the Field field set to \*ALL and the A (allow) field set to N.
3. Add a user record with the Field field set to \*STD and the A (allow) field set to Y.



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# Set Up User Defined Codes Security

## Setting Up User Defined Codes Security



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **User Defined Codes**

This utility allows you to secure users from adding, changing, or deleting User Defined Codes values. You can place security by individual system codes, thereby securing a user from changing User Defined Codes in one system, yet allowing them to change values in another system. \

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**Note:** Users can always inquire on UDC tables and the values in the tables.

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On User Defined Codes, you can choose Toggle Display Mode (F16) to display all User Defined Codes.

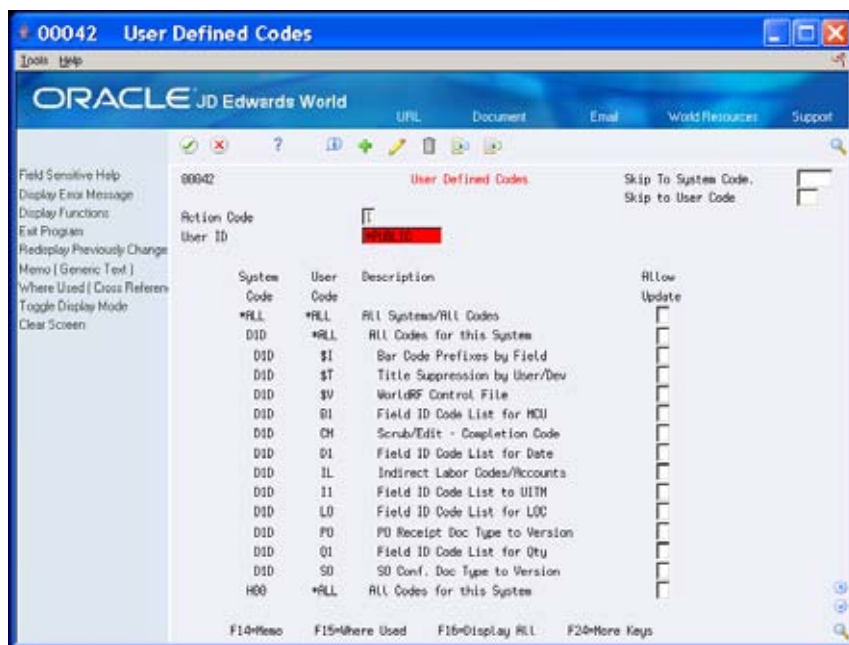
A user record overrides any group security. If the system finds a user record, the system never checks the group records for additional security within that code type. For example, if a user has a record in User Defined Codes security and is also part of a group, the system uses the user's security and it never checks the group security.

The User Defined Codes security file is F00042 and is in the client data files.

### To set User Defined Codes security

1. On User Defined Codes, enter a user ID in the User ID field.

A group profile and \*PUBLIC are valid values in the User ID field.



2. Enter N under the Allow Update field to secure a user from a code type or a specific table.
3. Perform a change.

Add memo notes here. There is also a function key exit to the cross reference.

## Troubleshooting User Defined Codes Security

Consider performing the following actions when troubleshooting user defined code security:

- Determine if a record exists for the user in the User Defined Codes program.
- Locate the user in the User Information program on the Security Officer menu (G94).
  - Determine if there is a group profile in the User Class/Group field.
  - If so, enter the group profile in the User ID field on the User Defined Codes screen.
- Determine if the \*PUBLIC user ID exists in the User Defined Codes program.
  - If so, determine if there is a Y or N in the Allow Update field for System Code \*ALL.
  - Determine if there is a Y or N in the Allow Update field for the UDC in question.

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# Set Up Name Search Type Security

## Setting Up Name Search Type Security



From Master Directory (G), choose **Hidden Selection 29**  
From General Systems (G00), choose **General User Defined Codes**

Search Type security restricts viewing Address Book records by Search Type in the Name Search and Address Book Information programs. Each Search Type is defined as a separate table within system code 94.

### To set up Name Search Type security

1. On General User Defined Codes, enter a user ID in the Code field to enable that Search Type. Each user ID that you enter here has access to only customers.

---

**Note:** If you do not add a User ID for any Search Type, this user cannot access any records.

---

2. Choose User Defined Code Types (F5) to view the User Defined Code Types screen, which displays all available Search Types.

**00041 User Defined Code Types**

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Redisplay Previously C  
Memo  
Where Used  
Translate Description (C  
Print User Defined Code  
Clear Screen

00041 User Defined Code Types Skip To User Code

Action Code   
System Code

User Code	Description	Code Length	2nd Line (Y/N)	Code Num (Y/N)
G	Search Type Security-Global	10	N	N
C	Search Type Security-Customers	10	N	N
E	Search Type Security-Employees	10	N	N
J	Search Type Security-Jobs	10	N	N
L	Search Type Security-Prop Rgmt	10	N	N
M	Search Type Security-Mail Dist	10	N	N
P	Search Type Security-Prospects	10	N	N
S	Search Type Security-States	10	N	N
T	Search Type Security-Tenants	10	N	N
V	Search Type Security-Vendors	10	N	N
X	Search Type Security-X-Emp	10	N	N
Z	Search Type Security-Comp Prop	10	N	N
99	Search Type Security-Global	10	N	N

F14=Memo F15=Where Used F10=Language F21=Print Code Types F24=More

3. Enter Search Type codes that you have defined as valid values. A Code Type = @ grants authority to search all.
4. From Security Officer (G94), choose Name Search Type.

**000901 Name Search Type**

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Search Type/ Action Co  
Clear Screen

000901 Name Search Type

Action Code   
Search Type Security (Y/N)

F5=Search Type/Action Code Setup F24=More Keys

5. Enter Y or N in the Search Type Security field. If set to Y, you must set up User Defined Codes to grant authority.



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**Note:** This security only works for programs P01051 and P01200. Name Search Type Security does not affect reporting.

Group profiles and the \*PUBLIC profile are not valid.

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# Set Up Batch Approval/Post Security

## Setting Up Batch Approval/Post Security



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **Batch Approval/Post**

Batch Approval/Post security restricts the approval and posting of batches to certain users. Security can be set up for General Ledger, Accounts Payable and Accounts Receivable systems. You set up a secured user and supervisor approval names:

---

**Note:** It is important to complete all of these steps. If you skip any of the steps, Batch Approval/Post Security does not work.

---

### To set up Batch Approval/Post Security

1. On Batch Approval/Post, choose Exit to User Group Authority (F5).

The screenshot shows the '00241 Batch Approval/Post' window in Oracle JD Edwards World. The window has a menu bar with 'Tools' and 'Help'. Below the menu bar is a toolbar with icons for help, back, forward, and other navigation functions. The main area is divided into two panes. The left pane contains a list of functions: 'Field Sensitive Help', 'Display Error Message', 'Display Functions', 'Exit Program', 'Exit to User Group Authority', and 'Clear Screen'. The right pane is titled 'Batch Approval/Post' and contains a table with the following fields:

Action Type	
G/L Batch Security (Y/N)	<input type="checkbox"/>
A/P Batch Security (Y/N)	<input type="checkbox"/>
A/R Batch Security (Y/N)	<input type="checkbox"/>
Batch Review Security (Y/N)	<input type="checkbox"/>

At the bottom of the window, there is a status bar that reads 'F5=Batch Security Setup F24=More Keys'.

2. On Batch Approval/Post Security, complete the following fields:

- **Approved by**  
Approved by user has authority to approve and post batches.
- **Secured User**  
Secured User does not have authority to approve or post batches.

The screenshot shows the '0024 Batch Approval/Post Security' window in the Oracle JD Edwards World application. The window has a blue title bar and a menu bar with 'Tools' and 'Help'. Below the menu bar is a toolbar with various icons. The main area is divided into two sections. The left section contains a list of functions: 'Field Sensitive Help', 'Display Error Message', 'Display Functions', 'Exit Program', 'Hard Copy', and 'Clear Screen'. The right section is titled 'Batch Approval/Post Security' and contains a form with the following fields: 'Action Type', 'Approved by', and 'Secured User'. Below these fields is a table with a header 'User' and several empty rows for data entry. At the bottom of the window, there is a status bar with the text 'F21=Print Batch Security F24=More Keys'.

3. Enter user IDs in the User fields for those batches that the Approved by user can approve and post.
  - \*ALL is valid if Approved By User has authority to all batches
  - Group profile or \*PUBLIC is not valid.
4. Exit (F3) to the Batch Approval/Post screen.

5. Enter a Y or N for each of the batch security approval/post programs.

00241 Batch Approval/Post	
Action Type	<input type="checkbox"/>
G/L Batch Security (Y/N)	<input checked="" type="checkbox"/>
R/P Batch Security (Y/N)	<input checked="" type="checkbox"/>
R/R Batch Security (Y/N)	<input checked="" type="checkbox"/>
Batch Review Security (Y/N)	<input checked="" type="checkbox"/>

F5=Batch Security Setup F24=More Keys

6. Access the Constants and enter Y in the Management Approval of Input field for each system.

You can locate the Constants for each system on the following Setup menus:

- General Accounting Constants (G0941)
- Accounts Receivable Constants (G0341)
- Accounts Payable Constants (G0441)

000909 General Accounting Constants	
Action Code	<input type="checkbox"/>
Batch Control Required (Y/N)	<input checked="" type="checkbox"/>
Management Approval of Input (Y/N)	<input checked="" type="checkbox"/>
Management Approval of Input F/R (Y/N)	<input checked="" type="checkbox"/>
Allow FBCD Postings (Y/N)	<input checked="" type="checkbox"/>
Allow Invalid Accounts (Y/N)	<input checked="" type="checkbox"/>
Symbol to Identify Short Number	<input type="checkbox"/>
Symbol to Identify BU Object Sub	<input type="checkbox"/>
Symbol to Identify 3rd G/L Account	<input type="checkbox"/>
Account Separator Character	<input type="checkbox"/>
Intercompany Settlement (Y/D/C/1/2/3/4/N)	<input type="checkbox"/>
Multi-Currency Conversion (Y/N/2)	<input checked="" type="checkbox"/>
Allow Multi-Currency Intercompany JE	<input checked="" type="checkbox"/>

F24=More Keys



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# Set Up Report Version Security for DREAM Writer

## DREAM Writer Security

As part of your security set up, you can restrict users from accessing DREAM Writer versions and the processing options for those reports.

This section contains the following:

- [Setting Up Report Version Security for DREAM Writer](#)
- [Masking DREAM Writer Processing Options](#)

## Setting Up Report Version Security for DREAM Writer



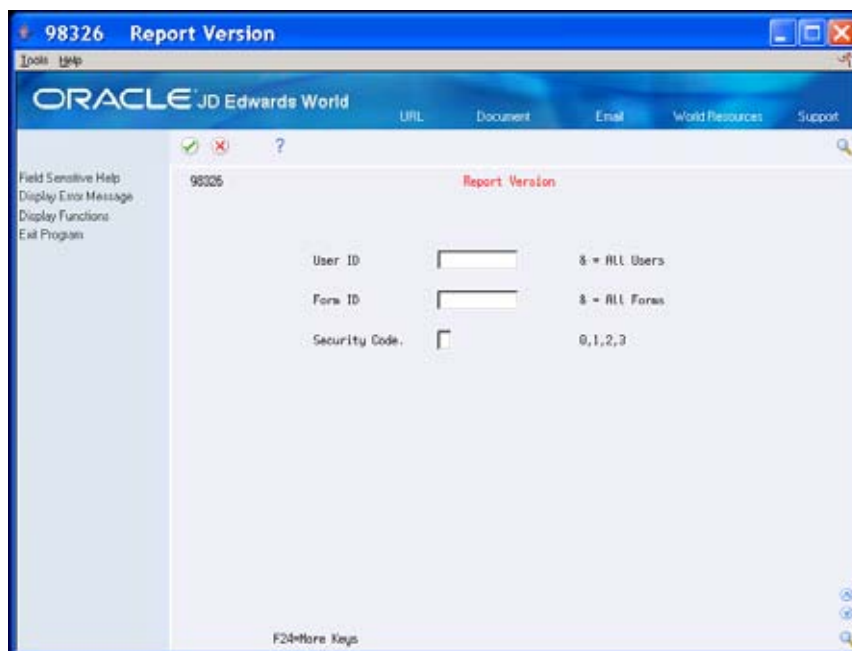
From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **Report Version**

Report Version security reassigns security for DREAM Writer versions. It restricts other users from executing, changing, deleting, and copying versions.

Initially, you should place security on DREAM Writer when you create the version. Use the Report Version utility to apply or remove DREAM Writer security.

### To set up Report Version security for DREAM Writer reports

1. On Report Version, complete the following fields:
  - User ID
  - Form ID



2. Complete the following field:

- Security Code

The Security Code field corresponds to the User Exclusive field in the DREAM Writer version. The values are:

- 0 – All users have all functions
- 1 – All users may execute the version, but only the user who created the version may change or delete it
- 2 – Only the user who created the version may execute, change, or delete the version. However, other users may copy from this version.
- 3 – Only the user who created the version may execute, change, delete, or copy the version.

Group security is not valid.

## Masking DREAM Writer Processing Options

As a security feature, you can mask DREAM Writer Processing Options from users by entering a value in the Display Level field next to each processing option that you need to hide. You must also enter a corresponding display level to the user profile. To mask the processing option you must:

- Enter a level higher in the DREAM Writer Processing Options than the level that you enter in the individual user profiles
- Enter a display level value only in the value entry lines (these are lines where the Text Only field contains a value of 0).



From DREAM Writer (G81), choose **Processing Options Set-up**



15-41

ORACLE JD Edwards World

File Database Email Window/Navigation Support

Tools

Print Purchase Order - Batch

Processing Options Set up

Action Code: 1 Form ID: P40000

Print Purchase Order - Batch

Seq	Seed	Opt	Bdr	R	Tool	B	Field	Mtr	10/1/1	J	D	Name
1	UNDEFINED CODES	13	00	00	1							
2	1. Enter the range of Status Codes to be selected for processing	13	00	00	1							
3	Next Status Code From (Optional)	13	00	00	1							
7	Next Status Code To (Required)	13	00	00	1							NOTE
8	Next Status Code Time (Required)	14	00	00	1							NOTE
13	1. Override Next Status (Optional)	14	00	00	1							
14	2. Override Next Status (Optional)	5	00	00	1							NOTE
15		5	00	00	1							
16		5	00	00	1							
17		5	00	00	1							
18		5	00	00	1							
19		5	00	00	1							
20		5	00	00	1							
21		5	00	00	1							
22		5	00	00	1							
23		5	00	00	1							
24		5	00	00	1							
25		5	00	00	1							
26		5	00	00	1							

Opt: 1-Insert Line 2-Dequeue 3-Delete Line F10-Previous F11-Language



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# Change User Profile Ownership

## Changing User Profile Ownership



From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>Change User Profile Ownership</b>
---

This utility transfers object ownership for *all* objects owned by one user to another user.

Additionally, using the IBM command CHGOBJOWN allows you to specify one object at a time. You must specify the object name in the command.

### To change the user profile ownership

On Change User Profile Ownership, complete the following fields:

- From User Id
- To User Id

---

**Note:** Use caution when using this option. It changes all objects, including IBM objects.

---

98CHGOWN Change User Profile Ownershi

Tools Help

ORACLE JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Return to Previous Panel  
Clear Screen

98CHGOWN Change User Profile Ownership

From User Id

To User Id

F12=Previous Screen

---

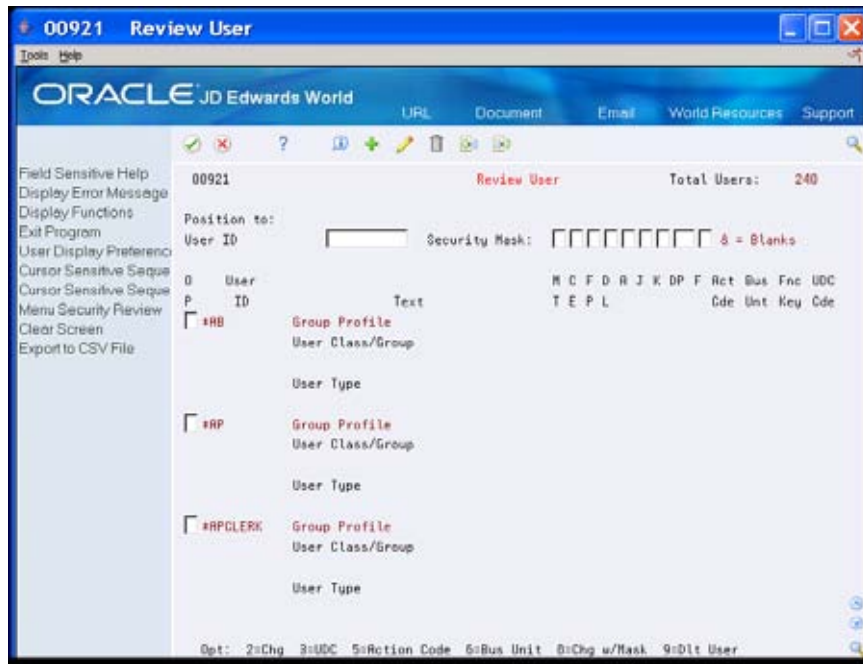
# Review User Security

## Reviewing User Security



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **Review User**

Review User facilitates the process of reviewing and maintaining JD Edwards World Security. The program displays user Ids and their associated security setup and provides exits to individual JD Edwards World security programs.



If security exists, a Y displays in the Act Cde, Bus Unt, Fnc Key, and UDC Cde fields.

Field	Explanation
User ID	The JD Edwards World software defined user profile
	<i>Screen-specific information</i>
	Position to: User ID – Positions selected user ID to the top of the display.

Field	Explanation
Menu Travel Flag (MT)	<p>Used to control menu traveling within the JD Edwards World menu program for an individual user. Values are:</p> <p>blank Indicates the user is allowed to menu travel.</p> <p>Y Indicates the user is allowed to menu travel.</p> <p>N Indicates the user is NOT allowed to menu travel.</p>
Command Entry Flag (CE)	<p>Used to control use of command entry in the JD Edwards World menu program for an individual user. You must also alter the IBM User Profile and Hidden Selections to eliminate a Command Line.</p> <p>This data field allows the values of blank, Y or N.</p> <p>Y Indicates the user has command entry.</p> <p>N Indicates the user does NOT have authority to command entry.</p> <p>blank Indicates the user has Command entry.</p>
Fast Path Security Flag (FP)	<p>The Fast Path flag is used to specify whether individual users may use the "Fast Path" method of processing within the JD Edwards World menu program.</p> <p>This data field allows the values of blank, Y or N.</p> <p>blank User is allowed to use fast paths</p> <p>Y User is allowed to use fast paths</p> <p>N User is NOT allowed to use fast paths.</p>
Level of Display (DL)	<p>The Level of Display field contains a number or letter identifying the level at which menus and processing options are displayed. The levels of display are as follows:</p> <p>A Product Groups (e.g. Job Cost, Manufacturing)</p> <p>B Major Products (e.g. GL, AP)</p> <p>1 Basic Operations</p> <p>2 Intermediate Operations</p> <p>3 Advanced Operations</p> <p>4 Computer Operations</p> <p>5 Programmers</p> <p>6 Sr. Programmers</p>

Field	Explanation
Authorization Mask (A)	<p>Complete with a user-defined value. This field exists in the JD Edwards World user profile and within each menu and menu selection. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. Comparison of the values in the user profile and the menu lock is hierarchical.</p> <p>A blank represents the highest level of authority. A through Z are the next levels, then 0 through 9. The user's value must be greater than or equal to that of the menu lock in the corresponding menu field to access the menu.</p>
Job Mask (J)	<p>Complete with a user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.</p>
Knowledge Mask (K)	<p>Complete with a user-defined value. This field exists in the JD Edwards World user profile and within each menu and menu selection. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. Comparison of the values in the user profile and the menu lock is hierarchical.</p> <p>A blank represents the highest level of authority. A through Z are the next levels, then 0 through 9. The user's value must be greater than or equal to that of the menu lock in the corresponding menu field to access the menu.</p>
Department Mask (DP)	<p>Complete with a two-character, user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.</p>
Future Use Mask (F)	<p>Complete with a user-defined, alphanumeric value. This field exists in the JD Edwards World user profile and within each menu and menu selection record. When security is active, the value of this field in the user profile is compared with the value in the corresponding menu lock. The values must be equal in the user profile and menu lock to access the menu. A blank in this field in the user profile gives the user all authority. A blank in this field in the menu record indicates no security exists on this menu.</p>

Field	Explanation
Act Cde (action code)	<p>The Yes or No Entry field is a common single character entry field for simple yes or no responses on prompt screens.</p> <p><i>Screen-specific information</i></p> <p>Specifies whether the user has action code security set up. Values are:</p> <p>Y     Yes, the user has action code security set up.</p> <p>N     No, the user does not have action code security set up.</p>
Bus Unt (business unit)	<p>The Yes or No Entry field is a common single character entry field for simple yes or no responses on prompt screens.</p> <p><i>Screen-specific information</i></p> <p>Specifies whether the user has business unit security set up. Values are:</p> <p>Y     Yes, the user has business unit security set up.</p> <p>N     No, the user does not have business unit security set up.</p>
Fnc Key (function key)	<p>The Yes or No Entry field is a common single character entry field for simple yes or no responses on prompt screens.</p> <p><i>Screen-specific information</i></p> <p>Specifies whether the user has business unit security set up. Values are:</p> <p>Y     Yes, the user has function key security set up.</p> <p>N     No, the user does not have function key security set up.</p>
UDC Cde (UDC code)	<p>The Yes or No Entry field is a common single character entry field for simple yes or no responses on prompt screens.</p> <p><i>Screen-specific information</i></p> <p>Specifies whether the user has UDC code security set up. Values are:</p> <p>Y     Yes, the user has UDC code security set up.</p> <p>N     No, the user does not have UDC code security set up.</p>
User Class/Group	<p>A profile used to classify users into groups for security purposes. Some rules for creating a User Class/Group are as follows:</p> <ul style="list-style-type: none"><li>▪ The 'Class/Group' profile must begin with * so that it does not conflict with any IBM profiles.</li><li>▪ The 'User Class/Group' field must be blank when entering a new group profile.</li></ul>



Field	Explanation
User Type	Defines the list of data files that are to be pre-opened at sign-on time. JD Edwards World provides 14 model user types.

## What are the Review User Options?

- 1 — work with IBM user profiles
- 2 — change; exits to User Information
- 3 — exits to User Defined Code Security
- 5 — exits to Action Code Security
- 6 — exits to Business Unit Security
- 7 — exits to Function Key Security
- 8 — modify using Security Mask
 

To use the security mask, place the character you want to add to the field in the Security Mask field. Enter 8 in the option field next to those user IDs you want to change.
- 9 — deletes user record from User Information
 

The delete option from Review User security is the cleanest way to delete a JD Edwards World user. Delete removes all user records from the following Security files:

  - User Information (F0092)
  - Action Code (F0003)
  - Business Unit (F0001)
  - Function Keys (F9612)
  - User Library List Control (F0093)

## What are the Review User Functions?

### User Display Preferences

#### User Display Preferences (F6)

### User Display Preferences

#### Cursor Sensitive Sequencing — Ascending (F16)

To view the screen in ascending order, place the cursor in the Security Mask field you want to sort by and press F16. To sort by User ID, move the cursor into the User ID column and press F16.

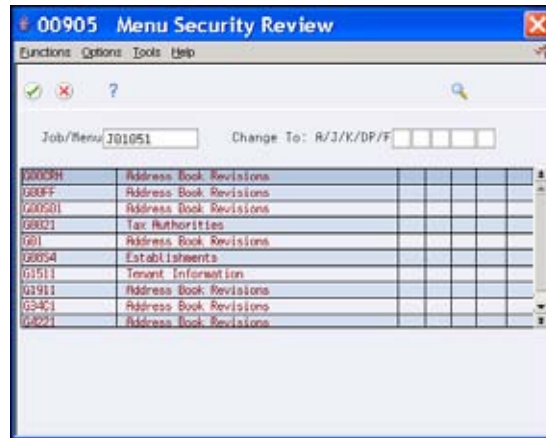
## Cursor Sensitive Sequencing — Descending

### Cursor Sensitive Sequencing — Descending (F17)

To view the screen in descending order, place the cursor in the field you want to sort by and press F17.

## Menu Security Review

### Menu Security Review (F18)



Menu Security Review allows you to view and update Menu Locks

## To update the menu locks

1. Complete the following fields:
  - Job/Menu
  - Change To A/J/K/DP/F
2. Choose the member you want to change.

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# Set Up Sarbanes-Oxley (SOX) Compliance

Thousands of companies face the task of ensuring their accounting operations are in compliance with the Sarbanes-Oxley (SOX) Act. After a comprehensive external audit by a SOX compliance specialist, which identifies areas of risk, you use several programs to set up and provide the "electronic paper trails" necessary to ensure SOX compliance. The reports you produce satisfy the requirement of an Internal Control Report stating that management is responsible for an adequate internal control structure, and an assessment by management of the effectiveness of the control structure.

Within JD Edwards World Software, action code security, processing options, menu masking, Database Audit Manager (DBAM), and imbedded iSeries security work well for managing security needs. JD Edwards World Software additionally provides an internal control report to satisfy the segregation of duties specified in section 404 of the SOX Act.

## Set Up SOX Compliance

To set up your system for SOX compliance, complete the following tasks:

- [To set up generic text information](#)
- [To set up process definitions](#)
- [To set up conflict definitions](#)

After you set up your system for SOX Compliance, you *must* verify your action code security and function key security are set up properly.

---

**Note:** The Action Code security for user ID \*PUBLIC for \*ALL programs *must* be set to N (no) for the Add, Change, and Delete fields.

The Function Key security for user ID \*PUBLIC and Field \*ALL for all critical videos must be set to N (no) to prevent access.

---

## Set Up Generic Text Information

You must set up new generic text information for the Process Conflicts file (F00712).

### To set up generic text information



From Developer's Workbench (G9362), choose Generic Text Definition

1. On Generic Text Definition, enter \*F00712 in the following field:
  - Application
2. Enter Process Conflict Definitions in the following field:
  - Description
3. Enter 2 in the following field:
  - Window Width
4. Enter 00 in the following fields:
  - Install System
  - Reporting System
5. Enter F00712 in the following field:
  - File ID
6. Enter J in the following field:
  - Ownership (JD Edwards World/User)
7. Enter RULN in the following field:
  - Data Item
8. Enter I in the following field:
  - Display (I/O)

**00161 Generic Text Definition**

Oracle JD Edwards World

URL Document Email World Resources Support

Field Sensitive Help  
Display Error Message  
Display Functions  
Exit Program  
Update and Redisplay  
Display Previous Window At  
Display Next Window Applc  
Clear Screen

00161 Generic Text Definition

Action Code: T  
Application: \*F00712  
Window Width: 2  
Install System: 00  
Reporting System: 00  
Process Conflict Definitions: Process Conflict Definitions  
Generic Text Key Length: 2  
File ID: F00712  
Ownership (JD Edwards World/User): J

..... Composite Key Definition .....

Key Seq	Data Item	Description	Ovr	Displ	Item	Ita	Data	Key	Size	Dec	Type	Size
10	RULN	Rule Name	1	1	15	2	5	6	15	6	6	6

Total Composite Key Length: 21  
Allowed: 999

F5=Update & Redisplay F19/20=Next/Previous Record F24=More Keys

Field	Explanation
Application	A name given to the particular application of the Generic Text Window. Various window definition data is stored based on this name.
Description	The name of a particular application of the Generic Text Window, as defined in the Generic Text Window Definition file (F00161).
Window Width	The size of the Generic Text Window. 1 Half screen (40 characters) 2 Full screen (80 characters)
Install System	Enter a UDC (98/SY) for the install system code.
Reporting System	Enter a UDC (98/SY) for the reporting system code.
File ID	Enter a number, such as the program number, table number or report number for the software element.
Ownership (JD Edwards World/User)	This flag indicates whether this information was set up by JD Edwards or by the user. If it is blank or "J", the information can be changed by JD Edwards World during PTFs and re-installs. If it is a "U", this indicates that the information was set up by the user, or that a JD Edwards World setup was modified by the user and it will NOT be changed during PTFs and re-installs. If this flag is set incorrectly, your custom modifications could be lost.
Data Item	Enter the name of the data item.
Display (I/O)	A flag indicating whether a key value is to be displayed in the Generic Text Window header when the window is displayed.

## Set Up Process Definitions

You use the Process Definitions program (P00711) to set up your processes. A process can be a single program, a combination of programs, or a combination of function key and subfile options that access multiple programs across the system. You can also set up a process that includes other processes. For example, you can set up your process for Accounts Payable (A/P) entry by entering all of the programs a user accesses during A/P entry. This might include the Address Book Revisions, Speed Voucher Entry, Standard Voucher Entry, and Recurring Voucher Inquiry programs.


The system stores all processes in the Process Definitions File (F00711).

You can use the F1 function key to access other screens containing data that you might use when creating a process. Use this function key in the following fields to access the various screens:

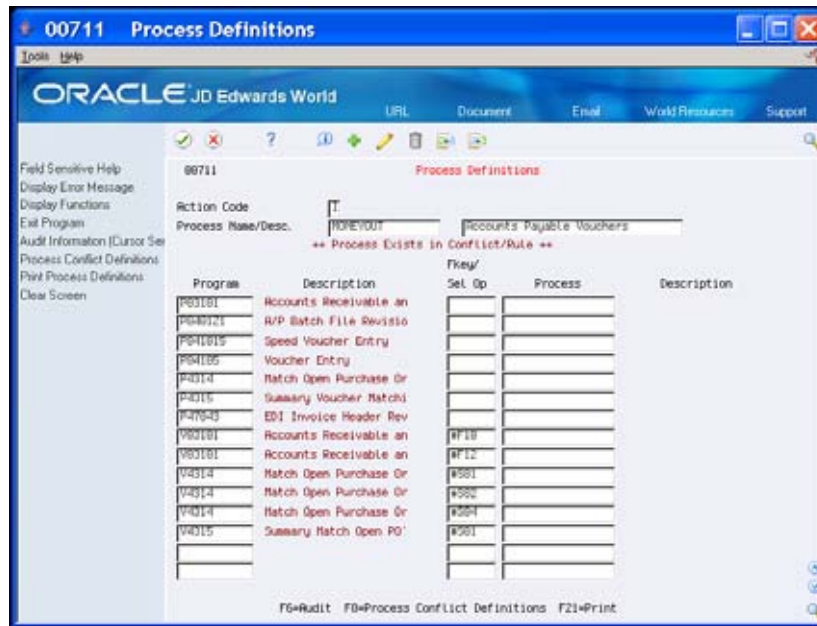
- **Process Name/Description**, accesses the **Process Definitions** window which contains all the process names and description that exist in F00711.
- **Program**, accesses the **Software Inventory** window that contains all programs in the system.
- **Function Key/Selection Option**, accesses the **Defined Function Key/Selection Option** window that contains all of the function keys (except F1, F7, F22, F24, Help, Page Up, and Page Down) as well as subfile options that exist within the video entered in the **Program** field.
- **Process**, accesses the **Process Definition Search** window that contains all processes in the system.

Additionally, you can access the **Process Conflict Definitions** program (P007121) by choosing **Process Conflict Definitions** (F8). Choose **Audit Information** (F6) to access the **Audit Information** window which contains system information such as, the user ID of the individual that last updated this process and the date and time in which the update occurred.

## To set up process definitions

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>Auditing and Reporting</b> From Auditing and Reporting (G947), choose <b>Process Definitions</b>
---	---

1. On **Process Definitions**, complete the following fields:
  - **Process Name**
  - **Description**
2. On **Process Definitions**, each detail line can contain a value in either of the following fields:
  - **Program**
  - **Process**
3. If you enter a value for a video in the **Program** field, then you must complete the following field:
  - **Function Key/Selection Option**



Field	Explanation
Process Name/Description	A process definition as defined for Sarbanes-Oxley compliance. A process definition can be a program or a function key/subfile option within a program, or a combination of different processes.
Program	The identification, such as program number, file number, and report number that is assigned to an element of software. If you use this field in conjunction with the Function Key/Selection Option field, the system requires this to be a video.  <i>Screen-specific information</i> You can also enter a video name in this field.
Function Key/Selection Option	The name of the field within the function key security file. This name is used in conjunction with a video name.
Process	A process definition as defined for Sarbanes-Oxley compliance. A process definition can be a program or a function key/subfile option within a video, or a combination of different processes.

## Set Up Conflict Definitions

You use the Process Conflict Definitions program (P007121) to set up all possible process conflicts. A process conflict can be between:

- Two processes
- A process and a program or vice versa
- A process and a function key/subfile option on a video or vice versa

- Two programs
- A program and a function key/subfile option on a video or vice versa
- Two function key/subfile options on a video

For example, you can set up a process conflict so that the system issues a violation if a user of the A/P entry process has access to any of the programs in the A/R entry process.


The system stores all processes in the Process Conflict Definitions File (F00712).

You can use the F1 function key to access other screens containing data that you might use when defining a conflict. Use this function key in the following fields to access the various screens:

- Rule Name, accesses the Conflicts Rule Search window which contains all the conflicts/rules.
- Program ID, accesses the Software Inventory window that contains all programs in the system.
- Function Key/Selection Option, accesses the Defined Function Key/Selection Option window that contains all of the function keys (except F1, F7, F22, F24, Help, Page Up, and Page Down) as well as subfile options that exist within the video entered in the Program field.
- Process Name, accesses the Process Definition Search window that contains all processes in the F00711 file.

Additionally, you can access the Process Definitions program (P00711) by choosing Process Definitions (F8). Choose Audit Information (F6) to access the Audit Information window which contains system information such as, the user ID of the individual that last updated this conflict/rule and the date and time in which the update occurred. Choose Memo (F14) to access the Generic Text window.

## To set up conflict definitions

	From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced & Technical Operations (G9), choose <b>Security Officer</b> From Security Officer (G94), choose <b>Auditing and Reporting</b> From Auditing and Reporting (G947), choose <b>Process Conflict Definitions</b>
---	--

1. On Process Conflict Definitions, complete the following fields:
  - Rule Name
  - Seq
2. On Process Conflict Definitions, each detail line can contain a value in either of the following fields:
  - Program ID
  - Process Name
3. If you complete the Program ID (video) field, additionally, you can complete the following field:
  - Function Key/Selection Option



4. Complete either of the following fields under the Conflicts With section:
  - Program ID
  - Process Name
5. If you complete the Program ID (video) field, additionally, you can complete the following field:
  - Function Key/Selection Option

Field	Explanation
Rule Name	A rule definition as defined for Sarbanes-Oxley compliance. A rule definition identifies conflicts between combinations of programs, function key/selection options, and/or processes. These rules help clarify segregation of duties.
Seq	A number that the system uses to sequence information.
Process Name	A process definition as defined for Sarbanes-Oxley compliance. A process definition can be a program or a function key/subfile option within a program, or a combination of different processes.
Program ID	The identification, such as program number, file number, and report number that is assigned to an element of software. If you use this field in conjunction with the Function Key/Selection Option field, the system requires this to be a video.
Function Key/Selection Option	The name of the field within the function key security file. This name is used in conjunction with a video name.



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# Work with SOX Reports

## Working with SOX Reports



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Security Officer**  
From Security Officer (G94), choose **Auditing and Reporting**

You use three reports to review and manage the information in your system about SOX definitions and processes.

- Use the Process Definitions Report (R007114) to review all process definitions in the system.
- Use the Process Conflict Definitions Report (R007124) to review all process conflict definitions in the system.
- Use the Process Conflict Violations Report (R00713) to review all process conflict violations in the system and during a SOX compliance audit.

## Running the Process Definitions Report



From Auditing and Reporting (G947), choose **Process Definitions**

You use the Process Definitions report (R007114) to review all of your processes. The system retrieves all processes in the Process Definitions File (F00711).

R007114 - Process Definitions Report							
007114		J.D. Edwards & Company Process Definitions Report			Page No. . . . 2 Date - . . . 12/26/06		
Process Name	Description	Program ID	Description	Fnc Key/ Sel Opt	Description	Process Name	Description
ADDRESSADVANCE	Address Book Advance	P0009011	Address Book Constan				
		P01016	Consolidate Code Rev				
		P01017	Related Address Revi				
		P010513	Address Book Control				
		P010514	Address Book - Soci				
		P01270	Organization Structu				
		P0150	Organization Structu				
		V01051	Address Book Informa	#F11	Address Book Control		
APPROVALREVIEW	Approval Reviews	P00A11	Approvals Transactio				
		P00A12	Approval Workbench				
		P00A13	Assigned Approvers				
		P00A131	Assign Approver				
		V00A11	Approvals Transaction	#S01	Submit Transaction		
		V00A11	Approvals Transaction	#S03	Reopen Transaction		
		V00A11	Approvals Transaction	#S05	Recommit Transaction		
		V00A11	Approvals Transaction	#S09	Cancel Transaction		
		V00A12	Approvals Workbench	#S02	Exit to Transaction		
		V00A12	Approvals Workbench	#S03	Approve		
		V00A12	Approvals Workbench	#S04	Reject		
		V00A13	Assigned Approvers	#F06	Assign Approver Wind		
APPROVALSETUP	Approvals Set UP	P00A14	Approver Substitutio				
		P00A15	Permanent Approver R				
		P00A17	Approval Rule Set				
		P00A18	Approver Groups				
		P00A19	Approver Routes				
		P00A20	Approval Schedule				
		P00A21	Approval Constants				
		V00A14	Approver Substitutio	#SDELT	Delete/Cancel		
		V00A14	Approver Substitutio	#S02	Exit to Audit Inform		
		V00A17	Approval Rule Set	#SDELT	Delete/Cancel		
		V00A18	Approver Groups	#SDELT	Delete/Cancel		
		V00A19	Approval Route	#SDELT	Delete/Cancel		
		V00A20	Approval Schedule	#SDELT	Delete/Cancel		

## Running the Process Conflict Definitions Report



From Auditing and Reporting (G947), choose Process Conflict Definitions

You use the Process Conflict Definitions report (R007124) to review all possible process conflicts. The system retrieves all process conflicts in the Process Conflict Definitions File (F007121).

R007124 - Process Conflict Definitions Report							
007124		J.D. Edwards & Company Process Conflict Definitions				Page - . . . . Date - . . . . 12/26/06	
Rule Name	Seq	Process Name	Description	Program ID	Description	Fkey/ Sel Op	Description
ABAPPROVALS	1.00	CUSTOMER	Adding A/B and Custo				
-- CONFLICTS WITH --		APPROVALREVIEW	Approval Reviews				
ABAPPROVALS	1.50	VENDOR	Adding A/B and Vendo				
-- CONFLICTS WITH --		APPROVALREVIEW	Approval Reviews				
ABAPPROVALS	1.75	ADDRESSADVANC	Address Book Advance				
-- CONFLICTS WITH --		APPROVALREVIEW	Approval Reviews				
ABAPPROVALSREV	1.00	APPROVALREVIEW	Approval Reviews				
-- CONFLICTS WITH --		CUSTOMER	Adding A/B and Custo				
ABAPPROVALSREV	1.50	APPROVALREVIEW	Approval Reviews				
-- CONFLICTS WITH --		VENDOR	Adding A/B and Vendo				
ABAPPROVALSREV	1.75	APPROVALREVIEW	Approval Reviews				
-- CONFLICTS WITH --		ADDRESSADVANC	Address Book Advance				
ADDRESSADVANC	1.00	ADDRESSADVANC	Address Book Advance				
-- CONFLICTS WITH --		CUSTOMER	Adding A/B and Custo				
ADDRESSADVANC	2.00	ADDRESSADVANC	Address Book Advance				
-- CONFLICTS WITH --		VENDOR	Adding A/B and Vendo				
APAPPROVALS	1.00	APPROVALREVIEW	Approval Reviews				
-- CONFLICTS WITH --		MONEYOUT	Accounts Payable Vou				
APAPPROVALS	2.00	APPROVALREVIEW	Approval Reviews				
-- CONFLICTS WITH --		MONEYOUTCHECKS	Accounts Payable Che				
APAPPROVALSREV	1.00	MONEYOUT	Accounts Payable Vou				
-- CONFLICTS WITH --		APPROVALREVIEW	Approval Reviews			80	
APAPPROVALSREV	2.00	MONEYOUTCHECKS	Accounts Payable Che				
-- CONFLICTS WITH --		APPROVALREVIEW	Approval Reviews				
CHECKSBANK	1.00	APPROVALSUB	Approval Substitutio	P0030	Bank Account Cross-R		
-- CONFLICTS WITH --							

## Running the Process Conflict Violations report



From Auditing and Reporting (G947), choose Process Conflict Violations

You use the Process Conflict Violations report (R00713) to review all possible conflict violations. Each time the system locates a conflict violation it enters it on the report and the reason why it is a violation. You can then use the information to adjust your security (action code and function key). Continue to run this report until there are no conflict violations or you are satisfied with the results of the report. You can use this report during a SOX compliance audit.

The system retrieves all of the security information for the processes, programs, and function key/selection options in the Conflicts Definition file (F00712), build a workfile of all the information, and then uses the information to build the Process Conflict Violations report. The system uses the following information in the following files to build the workfile:

- Group name for individual User ID from the Library Lists – User file (F0092)
- User/Group and action code security for every program within a process in the conflicts table from the Action Code Security file (F0003)
- User/Group and allow usage (Y/N) for every video/function key/selection opt within a process in the conflicts file from the Function Key security file (F9612)

The system also determines if the \*PUBLIC record is not setup for a program or function key/selection option. It creates a workfile record with \*PUBLIC = Y because without a \*PUBLIC record, it assumes that the users have full access. The system also creates all records in the workfile for every process/program/video even if the access is set to N because that can override the \*PUBLIC record, if it is set to Y.

## Data Selection

Ensure that the Rule Name is set to \*ALL.

## Data Sequence

Ensure that the Rule Name is set to Seq 001 and the Sequence Number is set to Seq 002. The Option field, in the fold, must be set to N.

R00713 - Process Conflict Violations Report							
00713		J.D. Edwards & Company Process Conflict Violations				Page - . . . 2 Date - . . . 6/08/06	
Rule Name. . . . TEST1		Seq #. . . . 2.00					
Process		Description		Process		Description	
-----		-----		-----		-----	
APCLERK		A/P Clerk		ARCLERK		A/R Clerk	
-----		-----		-----		-----	
Usr ID/Grp	Name	Conflict?	Conflict Information		Process	Program	Field
-----							
MR811401	Kreutz, Mark	Y	MR811401 has *ALL access for programs		ARCLERK	*ALL	
*PUBLIC		Y	*PUBLIC either not setup or has access		ARCLERK	P03105	
*PUBLIC		Y	*PUBLIC either not setup or has access		ARCLERK	P01053	
*PUBLIC		Y	*PUBLIC has *ALL access for video		ARCLERK	V03105	*ALL
*SOXAP		Y	*SOXAP has Change access		ARCLERK	P01053	
*PUBLIC		Y	*PUBLIC either not setup or has access		ARCLERK	P03105	
*PUBLIC		Y	*PUBLIC either not setup or has access		ARCLERK	P01053	
*PUBLIC		Y	*PUBLIC has *ALL access for video		ARCLERK	V03105	*ALL
*SOXAP		Y	*SOXAP has Change access		ARCLERK	P01053	
*PUBLIC		Y	*PUBLIC either not setup or has access		ARCLERK	P03105	
*PUBLIC		Y	*PUBLIC either not setup or has access		ARCLERK	P01053	
*PUBLIC		Y	*PUBLIC has *ALL access for video		ARCLERK	V03105	*ALL
*SOXAP		Y	*SOXAP has Change access		ARCLERK	P01053	
*SOXAB		Y	*SOXAB has Add, Chg, Del access		ARCLERK	P01053	
*SOXAR		Y	*SOXAR has Add, Chg, Del access		ARCLERK	P03105	
*SOXAR		Y	*SOXAR has Add, Chg, Del access		ARCLERK	P01053	
*SOXAR		Y	*SOXAR has *ALL access for video		ARCLERK	V03105	*ALL
-----							
Rule Name. . . . TEST1		Seq #. . . . 5.00					
-----		-----		-----		-----	
Program	Description		Process	Description			
-----		-----		-----		-----	
P9801	Software Versions Repository		ADDRBOOK	Address Book			
-----		-----		-----		-----	
Usr ID/Grp	Name	Conflict?	Conflict Information		Process	Program	Field
-----							
*PUBLIC		Y	*PUBLIC either not setup or has access		ADDRBOOK	P01051	
*PUBLIC		Y	*PUBLIC has *ALL access for video		ADDRBOOK	V01051	*ALL

Rule Name. . . . TEST1				Seq #. . . . 5.50			
Program		Description		Program		Description	
P9801		Software Versions Repository		P0092		Library List Control Revisions	
Utr ID/Grp	Name	Conflict?	Conflict Information		Process	Program	Field
*SOMTECH		Y	*SOMTECH has Add, Chg, Del access		TECH	P0092	
BS857151	Shuyler, Brian	Y	BS857151 has Add, Chg, Del access		TECH	P0092	
Rule Name. . . . TEST1				Seq #. . . . 7.00			
Video	Fkey/ Sel Op	Description	Process		Description		
V01051	#F02	A/R Information	APCLERNK		A/P Clerk		
Utr ID/Grp	Name	Conflict?	Conflict Information		Process	Program	Field
BS857151	Shuyler, Brian		No recs found with access to V01051 #F02			P9801	
Rule Name. . . . TEST1				Seq #. . . . 8.00			
Video	Fkey/ Sel Op	Description	Program		Description		
V01051	#F02	A/R Information	P0092		Library List Control Revisions		
Utr ID/Grp	Name	Conflict?	Conflict Information		Process	Program	Field
BS857151	Shuyler, Brian		No recs found with access to V01051		2	P9801	
Rule Name. . . . TEST1				Seq #. . . . 9.00			
Video	Fkey/ Sel Op	Description	Video	Fkey/ Sel Op	Description		
V01051	#F02	A/R Information	V9801	#F05	Checklists		
Utr ID/Grp	Name	Conflict?	Conflict Information		Process	Program	Field
BS857151	Shuyler, Brian		No recs found with access to V01051		2	P9801	





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## **16 Unattended Night Operations**



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# Overview to Unattended Night Operations (Sleeper)

## Objectives

- To understand how to set up Sleeper
- To understand how to schedule Sleeper
- To understand how to activate Sleeper

## About Unattended Night Operations (Sleeper)

Use Sleeper to run your jobs at a specified time. You generally do this with the following types of jobs:

- Lengthy jobs
- Jobs that take up a great deal of machine resources
- Jobs that require users to be signed off JD Edwards World software
- Jobs that need to run periodically

Sleeper is a dedicated subsystem that runs only one job - the Sleeper job. This job submits scheduled jobs and releases all the jobs that have been set for unattended release.

When you submit a job for unattended release, you must specify the date and time that you want the job released. Once the Sleeper subsystem is started, it will check the list of jobs every five minutes, or whatever time you decide, and release any jobs designated for release. If the Sleeper subsystem is not active at the release time for a given job, the job is released when the subsystem is started.

This section describes the following tasks:

- Set up Sleeper
- Schedule unattended operations
- Submit one-time jobs using Hidden Selection 82
- Activate Sleeper



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# Set Up Sleeper

## Setting Up Sleeper from the Version List

When you start Sleeper, you have a number of options to control the way the Sleeper job works.



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Run Time Setup**  
From Run Time Setup (G90), choose **DREAM Writer**  
From DREAM Writer (G81), choose **Versions List**

### To set up Sleeper from the Version List

1. On Versions List, enter P95901 in the Form field.

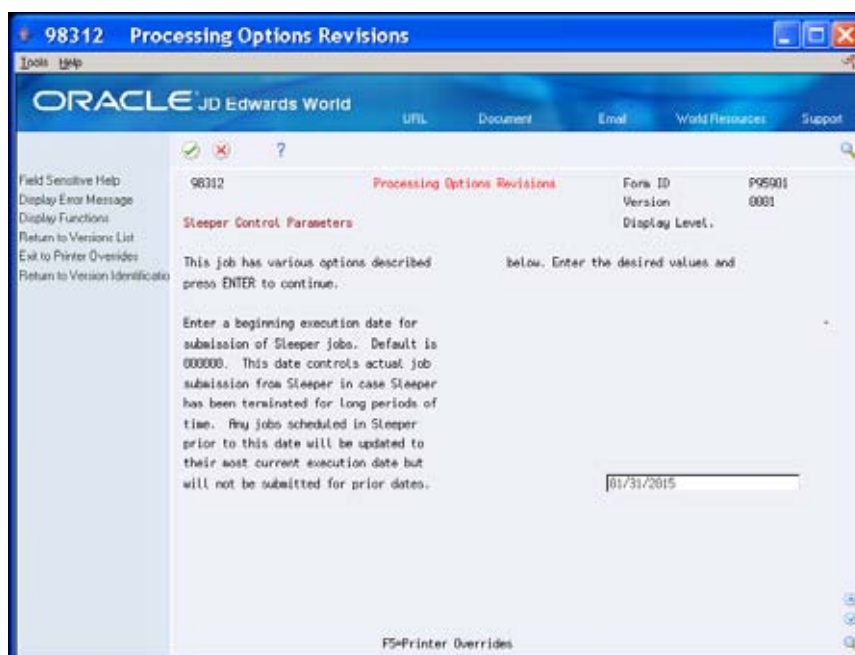
2. Enter 2 in the Option field for ZJDE0001.  
The DREAM Writer Menu window displays.
3. On the DREAM Writer Menu window, enter 1 for Processing Option Value[s].

Processing Options Revisions displays.

To change the parameters of version ZJDE001, you must sign on as DEMO. Alternatively, you can remove the security using Report Version Security for DREAM Writer. See *Set Up Report Version Security for DREAM Writer* for more information.

The screenshot shows a software window titled "98312 Processing Options Revisions". The window has a menu bar with "Oracle JD Edwards World" and several icons. On the left is a sidebar with a list of functions: "Field Sensitive Help", "Display Error Message", "Display Functions", "Return to Versions List", "Exit to Printer Overrides", and "Return to Version Identification". The main area displays the "Sleeper Control Parameters" form. It includes a header with "98312", "Processing Options Revisions", "Form ID P95901", and "Version 0001". Below the header, it says "This job has various options described below. Enter the desired values and press ENTER to continue." There are two input fields: one for "Sleeper wake up interval in seconds" with a default of "000300", and another for "normal beginning of work day in 24 hour clock format" with a default of "000000". The second field has a note: "(24:00:00 is NOT a valid value. Select values of 00:00:00 (midnight) through 23:59:59)". At the bottom, there is a button labeled "(Roll Up For Additional Options)" and a footer that says "FS=Printer Overrides".

4. Enter information into these processing options:
  - Sleeper Wake Up Interval — when Sleeper checks its queue for new jobs that users have submitted. The default is 300 seconds.
  - Beginning of Work Day — when the usual work day starts for users. Sleeper uses this time to determine when to shut down operations.
  - End of Work Day — when the usual work day ends for users. Sleeper uses this time to determine when to start operations.
5. Page up and down to view the continuation of the Sleeper Processing Options.



**6. Enter information into this processing option:**

**Beginning Execution Date** — the date that Sleeper should begin when submitting jobs. If the system finds any jobs with execution dates earlier than this, it will submit all older jobs at once.

## Set up Sleeper to Autostart in the Subsystem

You can set up Sleeper as an autostart job either when starting the Sleeper subsystem or after an Initial Power Load (IPL) of iSeries (AS/400).

### To set up Sleeper as an autostart job

1. Sign on as QSECOFR.
2. Create a Sleeper output queue by entering `CRTOUTQ QGPL/SLEEPER` on the command line.
3. Create a Sleeper user profile by entering `CRTUSRPRF USRPRF(SLEEPER) PASSWORD(*NONE) GRPPRF(QSECOFR) MSGQ(QGPL/SLEEPER) OUTQ(QGPL/SLEEPER)` on the command line.
4. Continue to set up Sleeper either by:
  - Setting up Sleeper to autostart when the subsystem starts
  - Setting up Sleeper to autostart after an IPL of iSeries (AS/400)

### To set up Sleeper to autostart when the subsystem starts

1. Create a Sleeper job description by entering `CRTJOB JOB(QGPL/SLEEPER) JOBQ(SLEEPER) OUTQ(QGPL/SLEEPER) USER(SLEEPER) RQSDTA('CALL`

JDFOBJ/J95901') INLLIBL (QTEMP \*sec \*common \*prod JDFOBJ QGPL) on the command line.

When entering the Initial Library List (INLLIBL) parameter in the CRTJOB command, enter the libraries as follows:

\*sec = the security library, if applicable

\*prod = the production library

\*common = the common library

JDFOBJ = the JD Edwards World object library

2. Add an autostart job entry to the Sleeper subsystem by entering the following commands on the command line:

ENDSBS SLEEPER \*IMMED

ADDAJE SBS(SLEEPER) JOB(SLEEPER) JOBD(SLEEPER)

STRSBS SLEEPER

3. Change the Sleeper user profile by entering CHGUSRPRF USRPRF(SLEEPER) JOBD(QGPL/SLEEPER) on the command line.

## To set up Sleeper to autostart after an IPL of iSeries (AS/400)

1. Create a Sleeper job description by entering CRTJOB JOB(QGPL/SLEEPER) JOBQ(SLEEPER) OUTQ(QGPL/SLEEPER) USER(SLEEPER) RQSDTA('CALL JDFOBJ/J95901JQ') INLLIBL (QTEMP \*sec \*common \*prod JDFOBJ QGPL) on the command line.

When entering the Initial Library List (INLLIBL) parameter in the CRTJOB command, enter the libraries as follows:

\*sec = the security library, if applicable

\*prod = the production library

\*common = the common library

JDFOBJ = the JD Edwards World object library

2. Add an autostart job entry to the QBATCH subsystem by entering the following commands on the command line:

ENDSBS QBATCH \*IMMED

ADDAJE SBS(QBATCH) JOB(SLEEPER) JOBD(SLEEPER)

STRSBS QBATCH

3. Change the Sleeper user profile by entering CHGUSRPRF USRPRF(SLEEPER) JOBD(QGPL/SLEEPER) on the command line.



## What You Should Know About

Sleeper	Description
<b>Allowing multiple Sleeper jobs to be active at one time</b>	<p>Entering the following command on the command line allows for 2 active jobs in the Sleeper subsystem. If you need more than two, you must change the 'maxjobs' value:</p> <pre>CHGSBSD SBSD(SLEEPER) MAXJOBS(2)</pre>
<b>Activating the new Sleeper job and testing the Sleeper auto-start job</b>	<p>Ensure no unattended jobs are currently being submitted and end the Sleeper subsystem.</p> <p>When the Sleeper subsystem ends, start the Sleeper subsystem by entering STRSBS SLEEPER on the command line.</p> <p>Enter WRKSBS on the command line and verify the Sleeper subsystem is active.</p> <p>On Work with Subsystems, view Sleeper subsystem jobs by entering 8 in the Option field to verify that both the original Sleeper job and the Sleeper autostart job are active.</p>
<b>To run multiple occurrences of Sleeper</b>	<p>You must create duplicate Sleeper objects for each environment. In this example, the second set of Sleeper objects is Sleeper2. Entering the following commands on the command line:</p> <pre>CRTOUTQ QGPL/SLEEPER2 CRTMSGQ QGPL/SLEEPER2 CRTJOBQ QGPL/SLEEPER2 ADDJOBQE SBSD(SLEEPER) JOBQ(SLEEPER2) MAXACT(1) SEQNBR(25)  CRTUSRPRF USRPRF(SLEEPER2) PASSWORD(*NONE) GRPPRF(QSECOFR) MSGQ(QGPL/SLEEPER2) OUTQ(QGPL/SLEEPER2)  CRTJOBQ JOBQ(QGPL/SLEEPER2) JOBQ(SLEEPER2) OUTQ(QGPL/SLEEPER2) USER(SLEEPER2) RQSDTA('CALL OBJLIB/J95901JQ') INNLIBL(QTEMP CLTSEC CLTCOM CLTDTA OBJLIB QGPL)</pre> <p><b>Note:</b> OBJLIB = The object library where J95901JQ resides. Typically JDFOBJ, CLTSEC = Security Library (if used), CLTCOM = Common library and CLTDTA = Data library</p>



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# Schedule Unattended Operations

## Scheduling Unattended Operations



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Computer Operations**  
From Computer Operations (G96), choose **Unattended Night Operations**  
From Unattended Night Operations (G9643), choose **Unattended Operations Setup**

You must schedule a job to run. If no jobs exist, the subsystem shuts down.

95101 Unattended Operations Set

Oracle JD Edwards World

Unattended Operations Setup

Job Type: ☐

System Code:

Job to Execute:

Obj Library:

User ID:

Run Date:

Run Time:

To Execute		Run						
Program	Description	Library	Date	Time	SMTWTFSS	F	O	Suspend

F0=Details F5=Software Inventory Search

The fields:

- In the upper portion of the screen categorize the jobs listed and you use them only for inquiry purposes
- In the bottom portion of the screen identify the individual jobs. These fields are divided into two categories: Execute and Run.
- Under the To Execute category information identifies and defines the job that is to be run.
- Under the Run category provide information about time and dates as well as frequency.

Field	Explanation
Job Type	<p>A type designation is assigned to each unattended or automatic job in the Unattended Operations Master Schedule. The allowed values are:</p> <p>blank Job is not run via the DREAM Writer nor does it have associated parameters.</p> <p>V Job is run under DREAM Writer control but has no parameters.</p> <p>P Job has associated parameters but does not use the DREAM Writer.</p> <p>R Job both has parameters and uses the DREAM Writer.</p> <p># Job has been suspended since the suspension date has expired.</p>
System Code	A user defined code (98/SY) that identifies a JD Edwards World system.
Job to Execute	The RPG or CL program name defined in the Software Versions Repository Master file. This is the program to run unattended.
Obj Library	The Object Library Name field designates the library location of the compiled object. For Program type objects, display file objects, and report file objects, the library name will be the same (i.e. "JDFOBJ"). For all physical and logical files, the object library name will be the test data file library name (i.e. "JDFDATA"). The object library name may be left blank for common subroutine copy members (these are source only objects).
Run Date	Enter the date an automated job is initiated.
User ID	The IBM-defined user profile.
Run Time	The time at which a job is to be submitted to the batch job queue for the assigned user. The format must be in hours:minutes:seconds and the value must be greater than or equal to 00:00:00 and less than 24:00:00.
Program To Execute	The RPG or CL program name defined in the Software Versions Repository Master file. This is the program to run unattended.
Description	The description of a record in the SVR file. The member description is consistent with the base member description.
Library	The name associated with a specific list of libraries. The J98INITA program uses these library list names to control environments that a user can sign on to. These configurations of library lists are maintained in the Library List Master table (F0094).
Date	The date an automated job is initiated.

Field	Explanation
Time	The time at which a job is to be submitted to the batch job queue for the assigned user. The format must be in hours:minutes:seconds and the value must be greater than or equal to 00:00:00 and less than 24:00:00.
SMTWTFS	<p>A brief description of a code or abbreviation.</p> <p><i>Screen-specific information</i></p> <p>Specifies the day or days of the week the job is to process. Each letter represents a day of the week, beginning with Sunday. Enter Y directly underneath each day of the week that the job is to process. If the Run Date occurs on a day of the week not specified here as Y, the Sleeper system postpones the job until the next day of the week specified. The program retains the actual Run Date and schedules future jobs accordingly.</p>
F (frequency)	<p>A code which is assigned to each unattended or automatic job in the Unattended Operations Master Schedule which defines the frequency that the job is to be automatically rescheduled. Allowed values are:</p> <p>D     Daily</p> <p>M     Monthly</p> <p>W     Weekly</p> <p>N     Monthly (last day of month)</p> <p>B     Bi-weekly</p> <p>Q     Quarterly</p> <p>S     Semi-monthly (1st &amp; 15th)</p> <p>A     Annual</p>
O (One Time Execution - Automated Job)	A code used to denote those jobs which are to be executed one time only and not rescheduled.
Suspend	The date a job is suspended from execution. Dates may be entered with or without imbedded slashes or dashes. If on entry the date is left blank, in most instances the system date will automatically be inserted. Exceptions to this rule will result in an error condition. Dates may be entered in MM/DD/YY format, or DD/MM/YY format, or YY/MM/DD format, based upon the configuration system value. The month must be 01 through 12. The days must be appropriate to the particular month.
System	A user defined code (98/SY) that identifies a JD Edwards World system.
Jobq	The computer waiting line that a particular job passes through. If blank, it defaults to the job queue specified in the user's job description.

Field	Explanation
Outq	The waiting area a job goes to after it has processed. Output Queues are sometimes attached to printers. If an OUTQ is not specified, it defaults from the user's job description.
Priority :Job/Output	The scheduling priority parameters specify the priority values to be used by the system to determine the order in which the jobs are selected for processing. Each job is given a scheduling priority that is used for both job selection and spooled file output. The job scheduling priority is specified by the JOBPTY parameter in commands like CHGJOB and CRTJOB. The priority value may range from 1 - 9 with 1 being the highest priority and 9 being the lowest priority. You cannot schedule a job with authority greater than your own.
User	The IBM-defined user profile.
Libl (Library List)	The name associated with a specific list of libraries. The J98INITA program uses these library list names to control environments that a user can sign on to. These configurations of library lists are maintained in the Library List Master table (F0094).
Form	The form name is the name of the RPG program which controls the function format of this DREAM Writer report. For FASTR and P & E FASTR reports, the form name can normally be any name the users may create.
Version	Identifies a group of items that the system can process together, such as reports, business units, or subledgers.
Program Parameter 1-8	These fields are used to pass specific values to the unattended job.

## Additional Sleeper Reports

Following are other reports that you can access from Sleeper:

- World Writer Report  
Program = J82001  
Parm1 = group ID, length = 10  
Parm2 = version, length = 10
- Column FASTR Report  
Program = P83410
- Row FASTR Report  
Program = P83500

---

# Submit One-Time Jobs

## Submitting One-Time Jobs

You can also use JD Edwards World Hidden Selection 82 to submit one-time jobs. This selection automatically sets up a record in the Unattended Operations Setup.

### To submit one-time jobs

1. On the command line, enter 82.



2. On Hold Submitted Jobs, enter Y in the following field:

- Hold on Job Queue.

3. Enter Y in the following field:

- Unattended Release.

The value in the Hold on Job Queue and Unattended Release fields remain Y until you change it.

When you sign off, the system resets the Hidden Selection 82 screen, but it does not reset the job description for the user. Be sure to turn the facility off by using Hidden Selection 82.

4. Submit the Job you want to run.

The screenshot shows a window titled '95902 Unattended Job Release Pro'. The window has a menu bar with 'Tools' and 'Help'. Below the menu bar is a header for 'ORACLE JD Edwards World' with links for 'URL', 'Document', 'Email', 'World Resources', and 'Support'. On the left side, there is a vertical menu with options: 'Field Sensitive Help', 'Display Error Message', 'Display Functions', 'Exit Program', 'Unattended Job Release', and 'Clear Screen'. The main area of the window displays '95902' and 'Unattended Job Release Prompt' in a green box. Below this, there are two input fields: 'Unattended Job Start Time' and 'Execution Date'. At the bottom of the window, it says 'F4-Unattended Job Release Inquiry'.

The system uses the information on this screen to submit your job on hold in the job queue:

- Sleeper releases job
- Look for J95RLSJB job in the Sleeper file (F9501)
- If you need to release the job early, you can go to the job queue and release it.



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# Activate Sleeper

## Activating Sleeper



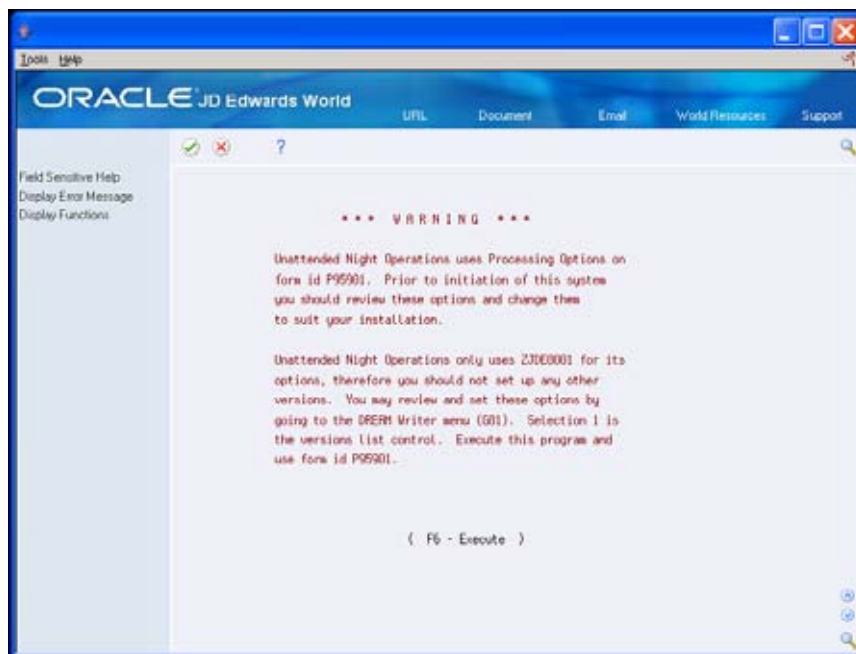
From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Computer Operations**  
From Computer Operations (G96), choose **Unattended Night Operations**  
From Unattended Night Operations (G9643), choose **Initiated Unattended Operations**

After you set up all of the processing options and schedule jobs for Sleeper to attend, you need to activate the Sleeper subsystem.

Must have QSECOFR authority to activate Sleeper. As QSECOFR, you can call JDFOBJ/J95901JQ.

### To activate sleeper

Press F6 after reading the warning message.



The following occurs:

- Job submits to batch
- Sleeper subsystem is automatically set up

- Sleeper subsystem automatically starts

If you do not schedule any jobs for Sleeper to run, the subsystem is automatically shut down. You need to restart the subsystem.

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## 17 Database Utilities



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# Overview to Database Utilities

## Objectives

- To understand the options available for data base management

## About Database Utilities

JD Edwards World provides the MIS Staff with tools to ensure that their production environments are set up properly to manage production libraries and to help them in solving problems that may arise in environments.

This section includes the following tasks:

- Create User Data Files
- Understand Other Data Base Options
- Understand the Video Disk Catalog
- Understand Other Documentation Services Options



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# Create User Data Files

## Creating User Data Files



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Computer Operations**  
From Computer Operations (G96), choose **Data Base Management**  
From Data Base Management (G9645), choose **Data Files**

### To create user data files

1. On Data File Creation enter information into the following fields:

- Enter System Code
- Create In Library
- FROM Library

The list of files displays.

Opt	File Name	Type	Description
	F00410	PHYSICL	PC A/B Batch Entry - Upload Request File
	F0070	PHYSICL	Country Constants Master File
	F009101	PHYSICL	Word Search Occurrence Master
	F01001	PHYSICL	Y 2000 date testing table1
	F01002	PHYSICL	Year 2000 date testing table2
	F0101	PHYSICL	Address Book Master
	F0101A	PHYSICL	Address Book Master File Audit Log
	F0101U	PHYSICL	Address Book Master - Updates
	F0101Z1	PHYSICL	Address Book - Batch File
	F0101Z2	PHYSICL	Address Book - Multi Mbr Batch File from
	F01090	PHYSICL	Supplemental Data Base - CORE
	F01092	PHYSICL	Supplemental Data Base - Code
	F010921	PHYSICL	Supplemental Data Base - Work File
	F01093	PHYSICL	Supplemental Data Base - Narrative

2. In the Option field, enter one of the following:


- 1 — Use source to create the file. You need to compile the file.

- 2 — Calls the IBM CL command, CRTDUPOBJ, to create a duplicate object without data. The system creates the file empty.
- 3 — Calls CRTDUPOBJ, but it creates the file with data. Use this option to create a new file from an old file or if an old file was accidentally deleted and you need to replace it.

## What You Should Know About

User Data Files	Description
<b>Creating User Data Files</b>	<ul style="list-style-type: none"><li>▪ Use to create new files from cumulative updates or reinstalls</li><li>▪ References the Software Versions Repository file</li><li>▪ Uses reporting system codes</li><li>▪ Create data files with or without data from an existing library</li><li>▪ Create data files from source</li></ul>

## About Copying Data Files

	<p>From Master Directory (G), choose <b>Hidden Selection 27</b> From Advanced &amp; Technical Operations (G9), choose <b>Computer Operations</b> From Computer Operations (G96), choose <b>Data Base Management</b> From Data Base Management (G9645), choose <b>Copy Data Files</b></p>
--	--

You can use the Copy Data Files screen to do the following:

- Create new files with data
- References the Software Versions Repository file
- Uses reporting system codes
- Create data files with data using the CPYF command

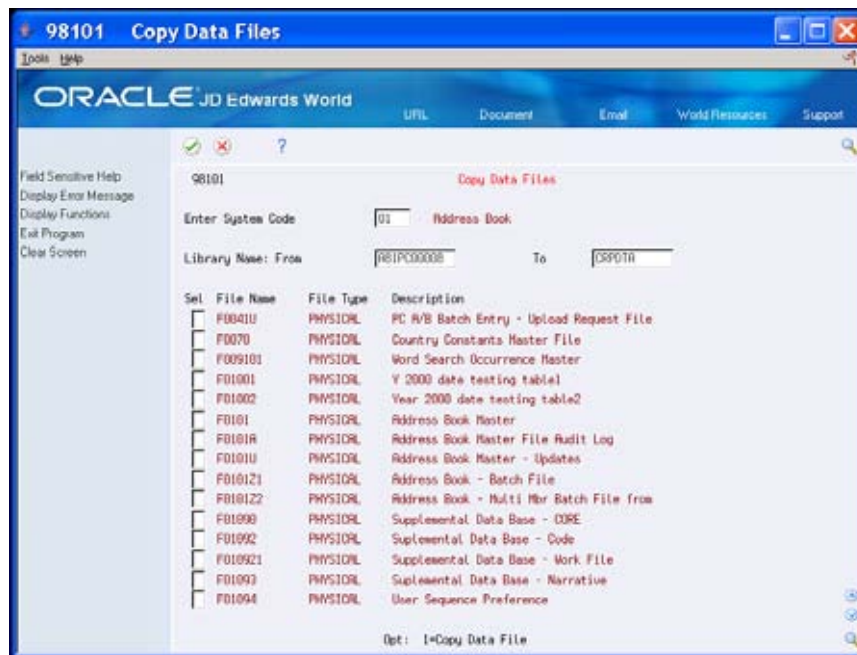
### To copy a data file

1. On Copy Data Files, complete the following fields:

- Enter System Code
- Library Name: From (From Library)
- To (Library)

The list of files displays.





## 2. Copy the files.



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# Understand Other Data Base Options

## About Other Options on the Data Base Management Menu



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Computer Operations**  
From Computer Operations (G96), choose **Data Base Management**  
From Data Base Management (G9645), choose **Optional Files Workbench**

Several other menu selections on the Data Base Management menu (G9645) are to help you with the setup and management of your database.

Menu Selection	Description
Reorganize Files	<ul style="list-style-type: none"><li>Reorganizes the major files in the JD Edwards World software.</li><li>DREAM Writer driven.</li><li>Do not change values on the Data Selection form.</li><li>Use the IBM Command RGZPFM to reorganize Dream Writer Files: F98301, F98302, F98303, F9831, F98311, and F98312.</li></ul>
Optional Files Report	<p>Produces a listing of all the files that have been designated as optional.</p> <ul style="list-style-type: none"><li>Has an expanded description that indicates what application or function requires the file.</li><li>Based on this information, you can elect to delete any of the files not relevant to your production environment.</li></ul>
G/L Disk Utilization Report	<ul style="list-style-type: none"><li>Used to help you summarize GL Files — F0911, F0901, and F0902</li><li>Used to help with Disk Utilization by Business Unit Summary report by Company</li></ul>
Journaling	Allows you to duplicate and monitor entries into the system.

## Working with Optional Files Workbench

The Optional Files Workbench provides access to optional files. With this utility, you access the SVR. You can also delete the optional files you do not need. The

system logs the deleted files. When you reinstall, the system does not install those files, but if you need them, you can recover them from the JDFDATA library.

Complete the following tasks:

- Work with Optional Files Workbench
- Review deleted files

## To work with Optional Files Workbench

1. On the message screen, press F6.
2. On Optional Files Workbench, enter a library name in the Library field.

The form displays the optional files.

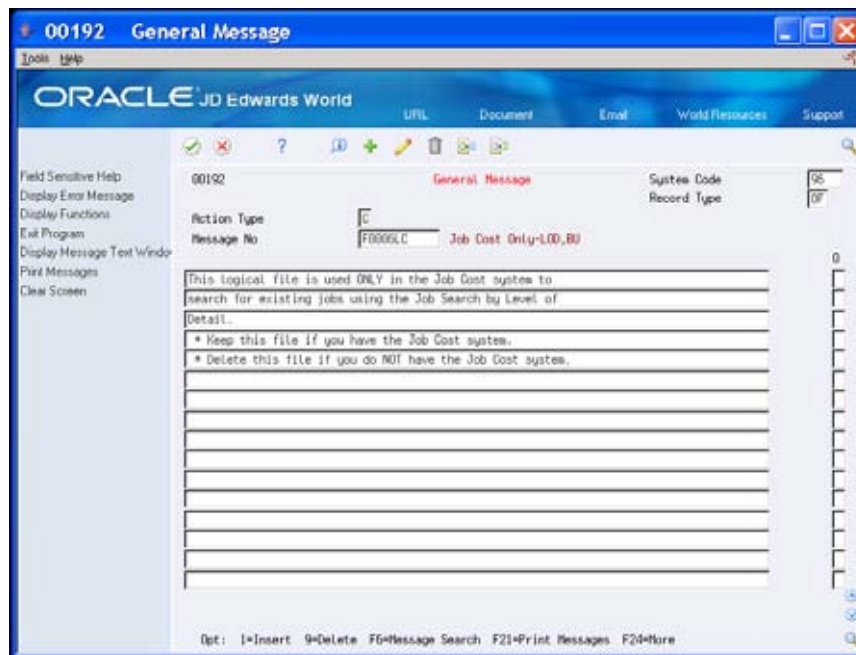
98290 Optional Files Workbench

Library: PSLFC00003

File ID	Description
F00063H	JF - BILLING ONLY - F0006/F0011 - Cost Center
F0006LC	LF - JOB COST ONLY - Level of Detail, Cost Center
F0006LG	Business Unit Master
F0006LH	LF - JOB COST ONLY - Company, Desc Compressed, Cost Center
F0006LT	LF - Type Business Unit/Company - One World only
F000721	Work Day Calendar Transaction File
F000721LR	LF - User, Batch, Transaction, Processed Flag
F000721LB	LF - User, Batch, Processed Flag
F000721LC	LF - User, Batch, Transaction
F000721LD	LF - User, Batch, Transaction, Line (descending)
F0010LD	LF - OneWorld - Document Typ, Document No, Key Co,
F0010LE	LF - OneWorld - Document Typ, Document No, sfx, Key Co, Ln ID
F00063H	Menu Selection History
F00063H	LF - Combined Sequences
F00063H	LF - A/R BALANCE INQ - Cat Code 1, Alpha Name, Address No

Opt: 1=Explanation 2=SVR 4=Delete F2=Add Entry F5=View Log F20=More

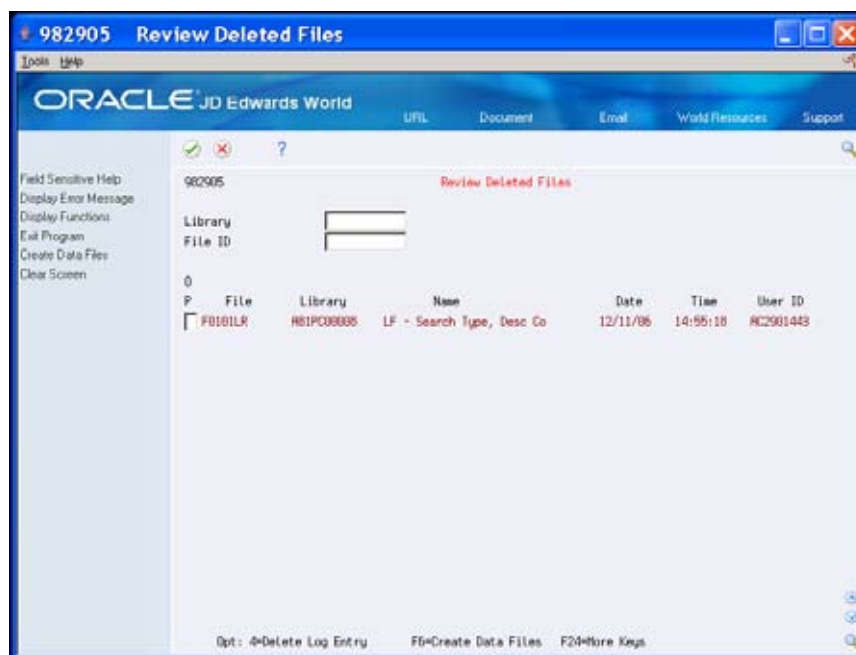
3. Enter 1 in the OP field next to the file you want to review.



## To review deleted files

The Review Deleted Files screen contains a list of the files you have deleted.

On Optional Files Workbench, choose Review Deleted File Log (F5) to access the Review Deleted Files screen.





# Understand the Video Disk Catalog

## Viewing the Video Disk Catalog



From Master Directory (G), choose **Hidden Selection 27**  
From Advanced & Technical Operations (G9), choose **Computer Operations**  
From Computer Operations (G96), choose **Video Disk Catalog**

The Video Disk Catalog allows you to review objects on your system at any specific point in time.

### To view the video disk catalog


On the message screen, press F6.

The Video Disk Catalog displays catalog information from the time of the last rebuild.

Object	Description	Size(KB)	No. Objects	Owner
QSYS	System Library	8,736,131	29,555	QSYS
SAVLIB	Save File for Interlas	7,636,220	206	HR011401
QIVS	*LIB	4,122,076	209	QSYS
QDOC	IBM Document Library	3,747,353	28,579	QSYS
SAVLIBR780	*LIB	3,635,024	183	QSECOFR
SAVLIBR7K1	*LIB	3,083,024	140	QSECOFR
PGFDT073	Work library for data conversi	2,812,848	5,121	QUSER
JDF00J01	J.D. Edwards R8.1 Object Librar	2,760,402	16,568	JDE
SAVLIBR6R2	*LIB	2,715,792	142	QSECOFR
JDF00J73	J.D. Edwards R7.3 Object Librar	2,605,740	16,429	JDE
SAVLIBR7.3	Masters save library	2,569,120	182	QSECOFR
JDFSR001	J.D. Edwards Production Source	2,396,396	6	JDE
SAVLIBR7R2	MASTER	2,240,060	139	TFRECTL
JDF00J71	J.D. Edwards R7.1 Object Librar	2,151,704	13,450	JDE
SAVLIBR0.1	Masters save library	2,125,244	180	QSECOFR
JDF00J62	JDE Object Library - R6.2	2,094,056	13,810	JDE
PGFDT001	Work library for data conversi	2,079,968	5,162	JDEPQMR
SAVLIBR7.2	R7.2 MASTERS LIBRARY	1,931,392	136	048278411

- Note “As of” Date. The Video Disk Catalog is not dynamic.
- Displays all objects on the system.
- Choose Toggle – Size Sequence for Library or Object (F13) to toggle between objects and libraries.

## Building the Video Disk Catalog

	<p>From Master Directory (G), choose <b>Hidden Selection 27</b></p> <p>From Advanced &amp; Technical Operations (G9), choose <b>Computer Operations</b></p> <p>From Computer Operations (G96), choose <b>Rebuilds and Global Updates</b></p> <p>From Rebuilds and Global Updates (G9642), choose <b>Disk Catalog</b></p>
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Use the Disk Catalog program to do the following:

- Build the Video Disk Catalog file (F98990).
- Create the file in QGPL if file is not found in library list.

The program builds files F98990, F98990LA, F98990LB, and F98990LC in library QGPL, only if these files do not reside in a library already in your library list.

### Before You Begin

Verify that you are signed on as QSECOFR or have the authority of QSECOFR.



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# Understand Other Documentation Services Options

## About Other Documentation Services Options

You can access the following JD Edwards World documentation services options from the Documentation Services menu (G91).

Options	Description
Video/Report Illustrations	View the layout of any screen that you can print using the Video Illustrations selection and any report that you can print using the Report Illustrations selection. The JDFSRC library is required.
Menu Directory	Displays a list of Menu IDs via that Index of Menus screen.
Data Dictionary Search	Displays the following via the Data Item Search screen: <ul style="list-style-type: none"><li>▪ 1 = Specifications</li><li>▪ 2 = Glossary</li><li>▪ 3 = Where Used</li></ul>
Object Cross Reference Repository	Cross reference of programs, data elements, data files, common subroutines, and device files for all systems: <ul style="list-style-type: none"><li>▪ Provides valid combinations of type and display</li><li>▪ Must be built, Menu G9642.</li></ul>
Software Versions Search	Look for specific programs within the Software Versions Repository.
Flow Charting	Must have cross reference built. Select Option and press F23.



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## 18 Processing Options



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# Additional DREAM Writer Options

## Processing Options

### Scan Report/Version files (P98570)

Processing Option	Processing Options Requiring Further Description
1. Include DREAM Writer reports Y/N? (This includes FASTR and STAR)	
2. Include World Writers Y/N?	
3. Should User = DEMO versions be included for either DW or WW Y/N?	
4. Include DW program calls from other programs. (This may take a few minutes to run because the IBM DSPPGMREF command will be used.)	
5. Keep Status entries from a previous run Y/N? (Refresh)	
6. Remove recursive versions (+) Y/N?	

### Report Version Archive/Delete Report (P98640)

Processing Option	Processing Options Requiring Further Description
1. Run in Final mode (F) or Proof mode (P)?	
2. Archive library name? Default = 'JDEARCHIVE'	



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# Environment Creation Processing Options

## Approvals Transaction Workbench (P00A11)

Processing Option	Processing Options Requiring Further Description
<p>DEFAULT VALUES:</p> <ol style="list-style-type: none"><li>1. Transaction Type (Optional)</li><li>2. Transaction Status (Optional)</li><li>3. Enter '1' to default the Transaction Originator from the User Profile.  If left blank, there will be no default value for Transaction Originator.</li></ol>	
<p>DISPLAY OPTIONS:</p> <ol style="list-style-type: none"><li>4. Enter '1' to sort transactions in descending order by date and time last updated (the most recent transactions first).  If left blank, the transactions will be sorted in ascending order (the earliest transactions first).</li></ol>	
<p>FIELD DISPLAY CONTROL:</p> <ol style="list-style-type: none"><li>5. Enter '1' to protect Transaction Originator.</li></ol>	





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## 19 Appendices



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# Appendix A – Custom Initial Programs

## For Those With Their Own Company Software or Purchased Software

For those of you who have your own company software or other purchased software in addition to JD Edwards World software, you can transfer easily among all of your software environments.

For example, you can create a custom master menu, call JD Edwards World software from that menu as well as call your company software and other purchased software. Then exit JD Edwards World software and return to your custom master menu without redefining your environment.

## Accessing JD Edwards World software

### Create a custom CL program

Create a custom CL program, where you must add the library containing the QJDF data area and then call either J98INIT or J98INITA.

### Create an IBM menu, using the STRSDA command

To establish this CL program as a call from your custom menu:

Both J98INIT and J98INITA saves your environment parameters. You no longer need to sign off to transfer among library lists or transfer among other software environments.

If using J98INIT and the user signs off with ..., hidden selection 90, hidden selection 30, or SIGNOFF, the user returns to the IBM menu.

If using J98INITA, hidden selection 30 takes the user back to the Multiple Library List Selection screen. From there, F3 returns the user to the IBM menu.

The system saves some parameters. They are:

- System library list (if the user is authorized to the commands)
- User library list
- Current library
- Output queue
- Local data area



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# Appendix B – Data Dictionary Changes

## Considerations When Changing the Data Dictionary

Be aware of the following considerations when making changes to the Data Dictionary.

- Do *not* change field sizes or decimal positions for fields that are currently used by existing systems.
- Do *not* change the Next Number Index without also changing the Next Number categories for that system. This might require a program change.
- Clone I vs Clone II Change Rules
  - Clone I programs require code changes because values are hard-coded
  - Clone II programs edit by using the Data Dictionary values. If a default value has been coded in the original data element, any change will be dynamic and reflects in all Clone II programs.

Use the following tables as guidelines when changing data items.

## General Data Items

Use the following chart to determine which types of edits require program changes.

ELEMENTS	CLONE I PROGRAMS	CLONE II PROGRAMS
Row Descriptions	Requires global rebuild	Requires global rebuild
Column Title	Requires global rebuild	Requires global rebuild
Install System Code	Do not change	Do not change
Data Item Type	Do not change	Do not change
Data Item Size	Do not change	Do not change
Data File Decimals	Do not change	Do not change
Data Display Decimals	Do not change	Do not change
Default Values	Real-time change if program is written to accept default	Real-time change
Help Program	Real-time change	Real-time change
Next Number System	Requires program change	Real-time change

ELEMENTS	CLONE I PROGRAMS	CLONE II PROGRAMS
Index Number	Requires program change	Real-time change

## Data Display Rules

The following table explains changes necessary for certain elements valid in the Data Display Rules field.

ELEMENT	CLONE I PROGRAMS	CLONE II PROGRAMS
CODE	Real-time change	Real-time change
MASK	Requires program change	Real-time change
JUSTIFY	Requires program change	Real-time change
*RAP	Requires program change	Real-time change
*RABN	Requires program change	Real-time change
*RAZ	Requires program change	Real-time change

## Data Edit Rules

The following table explains changes necessary for certain elements valid in the Data Edit Rules field.

ELEMENT	CLONE I PROGRAMS	CLONE II PROGRAMS
UDC	Requires program change	Real-time change
VALUE	Requires program change	Real-time change
RANGE	Requires program change	Real-time change
FILE	Requires program change	Requires program change

## Establishing this CL program as a call from your custom menu

Both J98INIT and J98INITA saves your environment parameters. You no longer need to sign off to transfer among library lists or transfer among other software environments.

If using J98INIT and the user signs off with .., hidden selection 90, hidden selection 30, or SIGNOFF, the user returns to the IBM menu.

If using J98INITA, hidden selection 30 takes the user back to the Multiple Library List Selection screen. From there, F3 returns the user to the IBM menu.

The system saves some parameters. They are:

- System library list (if the user is authorized to the commands)
- User library list
- Current library
- Output queue
- Local data area





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# Appendix C – Functional Servers

## About Functional Servers

Several JD Edwards World programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values
- Field edits and valid values
- Error processing
- Relationships between fields or applications

The advantages of a functional server are:

- It reduces maintenance of entry programs because edit rules reside in one central location.
- You can standardize documents across all applications because you create them using the same business rules.
- Generally, the user interface (appearance and interaction) of a form is now separate from how a program works.

### To set up business rules for an entry program

1. Create a DREAM Writer version for a specific functional server program (for example, XT0411Z1 for voucher entry).
2. Set the processing options within the version according to your company requirements.
3. Specify the version you want the entry program to use in the processing options for that entry program.

You can have all your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. JD Edwards World provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.

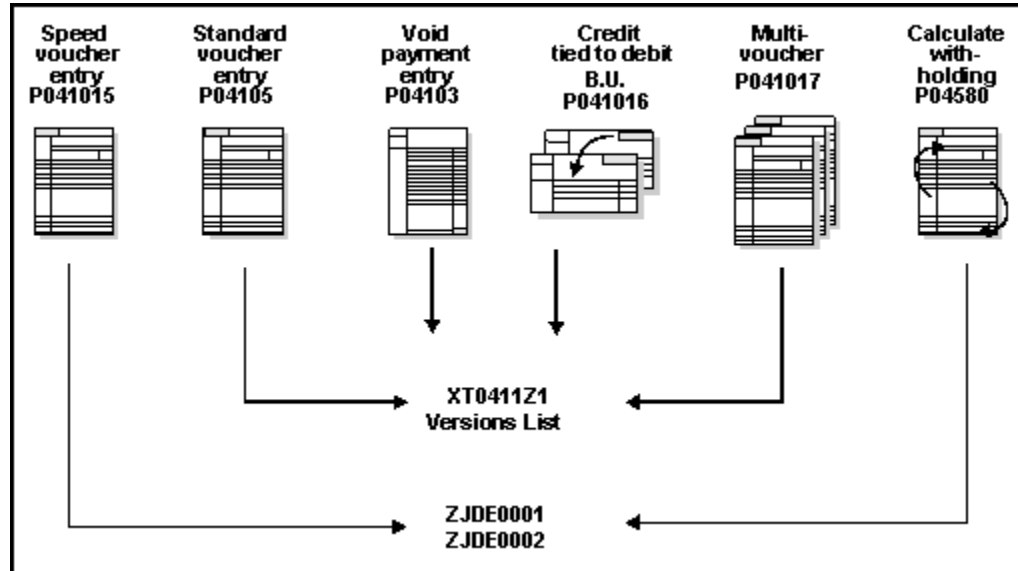
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**Caution:** Only the person responsible for system-wide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see the *Work with DREAM Writer*.

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## Example: Voucher Processing Functional Server

The following graphic shows the programs that use the voucher processing functional server. JD Edwards World provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.



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## Appendix D - Implementing Import/Export

You can implement Import/Export in a variety of JD Edwards World programs.

Although many JD Edwards World programs are similar, there are differences for which you might need to make some adjustments to the actions you perform while implementing Import/Export for a particular program. The following tasks outline the process for implementing Import/Export in JD Edwards World programs; however, each code line change and addition is not in this appendix.

JD Edwards World recommends that you refer to the code for a program in which Import / Export is active to become familiar with functionality of the software.

JD Edwards World does not provide customer support for programs you customize, including those in which you implement this functionality.

See *Working with Import/Export* for more information on setting up and using Import/Export.

This appendix includes the following:

- [Implementing Interactive Export](#)
- [Implementing Interactive Import](#)
- [Implementing Batch Export](#)
- [Programming Considerations](#)

### Implementing Interactive Export

You can implement Interactive Export in many of JD Edwards World interactive subfile programs. Interactive Export is not available in programs that display one record at a time, as this is a very time consuming method of exporting data. From subfile programs, Interactive Export exports the entire subfile and you do not need to page through the entire subfile.

Following is the flow for Interactive Export:

1. Users locate or enter data and then enter T (To PC) in the Action Code field or choose Export (F23) if the program is an inquiry only program.
2. The program executes subroutine C00E1, which:
  - Activates the Subfile Export Parameters program (P00SFDLP) and displays the Interactive Export Parameters window.
  - The user completes the fields and chooses Export (F6) on the Interactive Export Parameters window.

- The system saves the parameters in the Import/Export Parameters file (F00UDP).
  - Performs an inquiry and loads all records into the subfile.
3. The program:
- Displays the first page of the subfile.
  - Executes subroutine C00E2, which activates the Subfile Export Parameters program (P00SFDL) to export the data on the screen.
  - Displays the next page of the subfile.
  - Continues to display the subfile and execute C00E2 until it reaches the end of the subfile.
  - Executes subroutine C00IEM which sends a success or failure message to display on the workstation.
  - Executes subroutine C00IET, which ends the export process.

When the export is complete, the export process locks the file and it remains in the IFS, because the user can perform multiple exports. When the user exits the program, the system closes the file.

After you implement Interactive Export, you must add the program name to UDC 00/IE, Interactive Export Programs.

## Before You Begin

- For programs without an Action code field, Export (F23) is a standard function exit for Export. You must include this function key in the Function Key Definition (P9220) and Vocabulary Overrides (P9601) programs for the screens in the programs for which you implement Interactive Export.
- If the export file has multiple record formats (the starting-row-for-column-heading, record format names, and so forth) it can have multiple values and you must adjust the code accordingly.
- See the *Programming Considerations*.

## To implement interactive export

1. In the interactive program, include file F00UDP in input mode to section F.

F	FilenameIPEAF.....L..I.....Device+.....KExit++Entry+A....U1.
F	F00UDP IF E K DISK

2. Include copy modules C00IEM, C00IET, C00E1 and C00E2 at the end of the code.

```

C*
C*   Copy Common Subroutine - Interactive Export
C*
C/COPY JDECPY,C00E1
C/COPY JDECPY,C00E2
C*
C*   Copy Common Subroutine - Import/Export Message
C*
C/COPY JDECPY,C00IEM
C*
C*   Copy Common Subroutine - Import/Export Termination
C*
C/COPY JDECPY,C00IET
C*

```

**3. Call subroutine C00IEM after writing the video and just before reading the video in MAINLINE.**

```

C               ENDIF
C*
C*   Write video screen.
C*
C               WRITEV34601
C               #####MD   COMP '0'                      04
C               WRITEV3460C
C               MOVE '1'      @@AID
C               EXSR S001
C*               ----
C*
C*   Display result of Import/Export                      Insert
C*   EXSR C00IEM                                          Insert
C*   EXSR C00IEM                                          Insert
C*   EXSR C00IEM                                          Insert
C
C*   Load data field dictionary parameters (one cycle only).
C*
C               $998      CASEQ' '      S998
C               -----
C               ENDCS
C*
C*   Begin video screen read processing.
C*
C               SETOF                      999301
C               READ V3460                  9998

```

**4. Call subroutine C00IET, just before end of MAINLINE and after EOJ tag.**

```

C               EOJ      TAG
C*               ---      ---
C*
C*   Terminate the Import/Export process                      Insert
C*   EXSR C00IET                                          Insert
C*   EXSR C00IET                                          Insert
C*   EXSR C00IET                                          Insert
C
C*   END MAINLINE PROGRAM
C*   -----
C*****

```

**5. Perform one of the following:**

- If the video has an Action Code field, add the following code to MAINLINE, prior to S003 and then replace copy module C0001 with C0001T. For an example, see the Enter/Change Forecast (P3460) program.

```

C*
C*   IF clear screen requested, process and return.
C*
C*   @@AID      IFEQ #FCLR
C*           EXSR S001
C*           ----
C*           GOTO END
C*           ----
C*           ENDIF
C*
C*   If Exporting, process data and bypass subroutine
C*
C*   *IN27      IFEQ '1'
C*
C*   Set the starting row number for column headings
C*
C*           Z-ADD7      ##IESH  20
C*
C*   Number of lines in fold - zero if no fold
C*
C*           Z-ADD3      ##FDLN  20
C*
C*   Set the subfile record format name
C*
C*           MOVE'V3460S' ##IEF3  10
C*
C*   Set export parameters
C*
C*           EXSR C00E1
C*
C*   Write each subfile page and call export program
C*
C*           ##IERC      DOWEQ *BLANKS
C*           WRITEV3460C          99
C*           EXSR C00E2
C*           ----
C*           ENDDO
C*
C*           GOTO END
C*           ----
C*
C*   ENDIF
C*
C*   Load subfile records.
C*

```

- Replace copy module C0001 with C0001T as follows:

```

C*
C*   Copy Common Subroutine - Edit Action Code
C*
C/COPY JDECPY,C0001T

```

- If the video does not have an Action Code field, add the following code to Subroutine S00EX. For an example, see the Trial Balance by Company program (P09216).

```

C*
C*   If F7 pressed, exit to error messages and return.
C*
CSR   @@AID   IFEQ #FERRD
|
|
|
CSR   ENDIF
C*

C*
C*   If F23 is pressed, export subfile
C*   -----
C*
CSR   @@AID   IFEQ #F01
C*
C*   Set the starting row number for column headings
C*
Insert same code, as in export with Action Code
C*
C   EXSR C00E2
C*   ----
CSR   ENDDO
C*
CSR   GOTO ENDEXE
C*   ----
C*
CSR   ENDIF
C*

C*
C*   If F20 pressed, clear screen and return.
C*
CSR   @@AID   IFEQ #FCLR
CSR   EXSR S001

```

## Implementing Interactive Import

You can implement Interactive Import in subfile maintenance programs and programs that you use to maintain one record at a time. The subfile programs can import the entire subfile automatically and you do not need to page through the entire subfile.

In addition to this task, JD Edwards World recommends that you review the *Programming Considerations*.

Following is the flow of Interactive Import:

1. In the program, the user enters F (From PC) in the Action Code field.
2. The program executes subroutine C00I1, which:
  - Activates the Interactive Import Parameters program (P00IULP) and displays the Interactive Import Parameters window.
    - On the Interactive Import Parameters window, the user completes the fields and chooses Export (F6).
    - The system saves the parameters in the Import/Export Parameters file (F00UDP).
  - Activates the Interactive Import program (P00IUL), which brings the data into the program from the CVS files.
  - Loads the header information or a single record into the screen.
3. The program:
  - Loads records into one page of the subfile (if present).
  - Continues to import each subfile page, until it reaches the end of the subfile.
  - Displays the import records.

- Executes subroutine C00IEM, which sends a success or failure message to display on the workstation.
- Executes subroutine C00IET, which ends the export process.

After you implement Interactive Import, you must add the program name to UDC 00/II, Interactive Import Programs.

## To implement interactive import

1. Include the Import/Export Parameters file (F00UDP) in input mode to section F.

```
FilenameIPEAF.....L..I.....Device+.....KExit++Entry+A....U1.
FF00UDP IF E K DISK
```

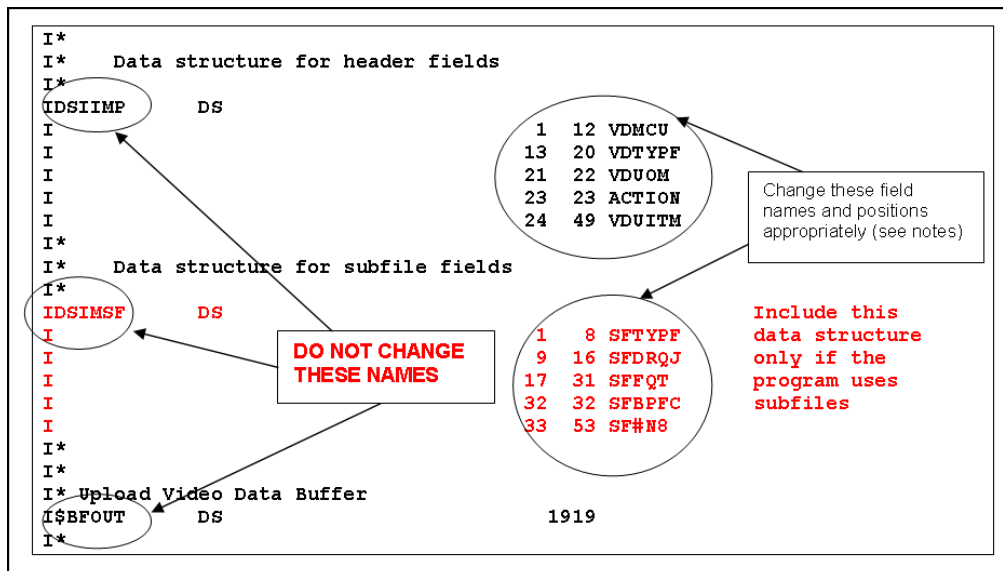
2. Include copy modules C00I1, C00I2, C00IEM and C00IET at the end.

```
C*
C*   Copy Common Subroutine - Import/Export Message
C*
C/COPY JDECPY,C00IEM
C*
C*   Copy Common Subroutine - Import/Export Termination
C*
C/COPY JDECPY,C00IET
C*
C*   Copy Common Subroutine - Interactive Import
C*
C/COPY JDECPY,C00I1
C*
C*   Copy Common Subroutine - Subfile Import           If required
C*                                                     If required
C/COPY JDECPY,C00I2                                   If required
C*                                                     If required
```

3. Copy C0001T.

```
C*
C*   Copy Common Subroutine - Edit Action Code
C*
C/COPY JDECPY,C0001T
```

4. Define a data structure (define two data structures if a subfile exists) with the fields in the exact order as they appear on the video. Then define a data structure for \$BFOUT





5. Call subroutine C00IEM after writing the video and just before reading the video in MAINLINE

C*	Write video screen.	
C*		
C	WRITEV34601	
C	####MD COMP '0'	04
C	WRITEV3460C	
C	MOVE '1'	@@AID
C	EXSR S001	
C*	----	
C*	Display result of Import/Export	Insert
C*		Insert
C*		Insert
C	EXSR C00IEM	Insert
C*	Load data field dictionary parameters (one cycle only).	
C*		
C	\$998 CASEQ' '	\$998
C*	-----	----
C	ENDCS	
C*		
C*	Begin video screen read processing.	
C*		
C	SETOF	999301
C	READ V3460	9998

6. Add the following code to MAINLINE, just before S003. For an example, see the Enter/Change Forecast (P3460) program.

C	@@AID	IFEQ #FCLR	
C		EXSR S001	
C		GOTO END	
C		ENDIF	
C*	If Importing, process data and redisplay screen		
C*			
CSR	*IN26	IFEQ '1'	
C*			
CSR		MOVE*BLANKS	##IEF1
CSR		MOVE'V3460C'	##IEF1
CSR		MOVE*BLANKS	##IEF2
CSR		MOVE'V3460S'	##IEF2
C*	Import values from CSV file		
C*			
CSR		EXSR C00I1	
C*			
CSR	##IERC	IFEQ ' '	
CSR		SETON	31
CSR		WRITEV3460C	99
CSR		SETOF	203193
CSR		ENDIF	
C*	If subfile exists, import values for subfile fields		
C*			
CSR	##IERC	DOWEQ*BLANKS	
CSR		EXSR C00I2	
CSR	##IERC	IFEQ ' '	
CSR		WRITEV3460S	81
CSR		ENDIF	
CSR		ENDDO	
C*			
CSR		GOTO END	
C*	----		
C*			
CSR		ENDIF	
C*	Load subfile records.		
C*			
C		EXSR S003	

7. Call subroutine C00IET, just before end of MAINLINE and after EOJ tag.

C	EOJ	TAG	
C*	---	---	
C*	Terminate the Import/Export process		Insert
C*			Insert
C*			Insert
C	EXSR C00IET		Insert
C*			
C*	END MAINLINE PROGRAM		

## Implementing Batch Export

JD Edwards World includes Batch Export in World Writer and certain DREAM Writers. You can implement Batch Export to work with additional DREAM Writers. The export runs when you run the DREAM Writer or World Writer. When the system creates the spool file, the Batch Export process reads the spooled file and exports the contents to the IFS file set up in the parameters. The batch export currently works only if the job generates only one spooled report file. The system cannot accommodate more than one generated report.

You access the Spooled File Export Parameters window from the Additional Parameters screen of the corresponding DREAM Writer or World Writer version by choosing Batch Export Parameters (F6).

Batch Export from a DREAM Writer uses literals, or Export Tags, that you add to the right-hand side of the report. These Export Tags should only print when you use the report for Export. You add six characters to the normal width of the report when you enable Export and run the report. The conditions for this logic to work correctly follow:

- The Export Tags must exist in the report Data Description Specifications (DDS)
- The system compiles the report DDS file with the new report width (the original width plus 6 characters)
- The system updates the F9805 Printer Overrides file record for the report to the new report width (the original width plus 6 characters)
- The program name exists for UDC 00/BE Batch Export Programs.

If the UDC record 00/BE) does not exist, the system bypasses all of the special logic for export capable reports and uses the Form Width in the Printer Override record. If the Form Width is blank or there is no Printer Override record then the system does not override the form width and the width remains as you set it in the printer file.

If the UDC record exists then the report should be capable of export. The system always uses the F9805 record as a starting point for the form width because this should be the true length of the printer file including the 6 bytes of export tag characters. If the Enabled export parameter is N, the system calculate form width as the width in the F9805 record minus six.

If a parameter record in the F00UDP file does not exist, the system also determines that the Enabled export parameter is N.

If a Print Override record exists and has a form width that is greater than the actual report width (the width in the F9805 record minus six), the system replaces the Print Override width with the correct width (the width in the F9805 record minus six). This prevents you from entering a longer width that would cause the tags to print when you disable the export function. You can enter a width that is shorter than the actual report width and this width remains in effect as long you do not set a processing option for the report to produce an export file. This produces a shortened report.

If you enable the report to produce an export file, the tags must be present so the Print Override width is always set to be the form width in the F9805 record.

In addition to this task, JD Edwards World recommends that you review the *Programming Considerations*.

## To implement batch export

1. In the CL program, declare the variables as shown.

DCL	VAR (&PRTFILE)	TYPE (*CHAR)	LEN (10)	VALUE ('R09410')
DCL	VAR (&PRTWIDTH)	TYPE (*DEC)	LEN (3 0)	VALUE (132)
DCL	VAR (&RETC)	TYPE (*CHAR)	LEN (1)	VALUE ('')

Replace with appropriate report and width (width before changes)

2. Immediately after the RPG program call, call the Spool File Export program and add error handler for export failure.

CALL PGM(P09410) PARM(&PSPID &PSVERS)		
CALL PGM(P00SPDL)	PARM(&PSPID &PSVERS &PRTFILE &PRTWIDTH &RETC)	Insert
IF	COND(&RETC *EQ 'F') THEN (DO)	Insert
GOTO	ABEND	Insert
ENDDO		Insert

3. Change the RPG program as necessary.

If you alter any field in the report, you might need to make corresponding changes in the RPG code. You might have to recompile the RPG program over the changes in the report file.

4. Change the report file by adding a blank 1 byte field at the end and then the 4 byte literal on each line on the DDS. Use the following convention where n can be 1 through 9:

PHDn – On all Page Heading lines

CHDn – On all Column Heading lines

DTLn – On all Detail lines

TOTn – On all Total lines

ULNn – On all Underlines

TXNn – On all Text lines

5. Add a prefix of “R@” for the one-byte field.

A	R	HEADING1							
A						2'09410'			
A						SKIPB(1)			
A		VCOCO	40A			46TEXT('Company Name			')
A		VTX019	12A			112TEXT('Page -			')
A						129PAGNBR			
A						EDTCDE(2)			
A		R@PHD1	1A			134			Insert
A						135' PHD1'			Insert
A		RRTTL0	40A			46TEXT('Trial Balance			')
A						SPACEB(1)			
A		VTX003	12A			112TEXT('Date -			')
A						125DATE			
A						EDTCDE(Y)			
A		R@PHD2	1A			134			Insert
A						135' PHD2'			Insert
A		RRTXT2	40A			46TEXT('Processing Option Text			')
A						SPACEB(1)			
A									
A									
A		VTX001	8A			103TEXT('Postings			')
A		VTX017	14A			116TEXT(' Current			')
A		R@CHD1	1A			134			Insert
A						135' CHD1'			Insert
A		VTX008	1A			36TEXT('D			')
A						SPACEB(1)			
A		VTX013	14A			66TEXT(' Balance			')
A		VTX015	14A			83TEXT(' This Period			')
A		VTX016	14A			100TEXT(' Year-to-Date			')
A		VTX018	14A			116TEXT(' Balance			')
A		R@CHD2	1A			134			Insert
A						135' CHD2'			Insert
A						1'-----'			
A						SPACEB(1)			
A									
A									
A		R DETAIL1							
A		RRCO	5A			1TEXT('Company			')
A						SPACEB(1)			
A									
A		RRAYTD	17A			99TEXT('Amount - YTD			')
A		RR#BAL	17A			116TEXT('Amount - Current Balance			')
A		R@DTL1	1A			134			Insert
A						135' DTL'			Insert
A		R DETAIL2							
A									
A									
A		R DETAIL3				65'-----'			
A						SPACEB(1)			
A						82'-----'			
A						99'-----'			
A						116'-----'			
A		R@ULN2	1A			134			Insert
A						135' ULN'			Insert

After you implement Interactive Export, you must add the program name to UDC 00/BE, Batch Export Programs.

## Programming Considerations

Correct the values in the following generic fields in the copy module:

Field	Value
##USER	User running the application program.
PSKEY	Display file.
SPGSZ	Number of subfile records in one page (with subfile folded).
SSVI1	Total records in the subfile.
#SFRNO	Number of first subfile record on display.

Field	Value
ACTION	Action Code.
SCYCLE	Used to indicate fresh screen to display.
*IN38	Used in video to indicate an empty subfile.

For all interactive programs, you must declare or change @NAC in S999 to allow or prohibit the values of F (From PC) and T (To PC) in the Action Code field. Extend the array from 5 to 7 bytes, with the 6th byte controlling import and 7th byte controlling export. A blank allows the corresponding action and any value prohibits the corresponding action. Leave the first 5 bytes as they are, otherwise you can compromise existing functionality. For example:

1234567

@NAC = '     '. Allows both import and export.

@NAC = '   N '. Prohibits import and allows export.

@NAC = '    N'. Allows import and prohibits export.

Remove copy module D0001 or D0001L from all programs with an Action Code field.

If you implement both Import and Export in a program, enter the call for subroutines C00IEM and C00IET only once.

You must define the Invite keyword on all control record formats in the video to export the fold area correctly. Review the videos for Enter/Change Forecast (V3460) and Trial Balance by Company (V09216) to determine where to define this.

The screen must use \*IN38 on the SFLDSP keyword for the export to function correctly. Also, turn this indicator on or off from the program RPG, depending on whether the subfile has records or not. Review the screens in the Enter/Change Forecast (P3460) and Trial Balance by Company (P09216) programs for details. If you do not set this indicator, the user receives an error message that they must perform an inquiry before the export (error message JDE0513), even if the user performs an inquiry.

Before declaring the data structures DSIIMP and DSIMSF for interactive import, run the command DSPFFD with the display file to view the order in which fields appear on the video. Include all fields that are input capable and have a valid value for Row and Column. If these fields contain blanks, the fields are hidden.

You can import data into a video with multiple record formats. However, different record formats might have different fields in a different order and you must declare separate data structures to match each record format. The import process always places data in DSIIMP/DSIMPSF. You must add code to move data from DSIIMP/DSIMPSF to the corresponding data structure.

You must decide whether to implement import in multiple formats. If you allow importing in only one format and you import in another format the system issues the 582O or JDE0520 results errors. For example, see the Transfer Order Entry program (P4242).

RPG programming does not allow a particular field to appear in multiple data structures. If you define a video field in multiple data structures, it must have different names and you must enter separate code to move data into the video field.

For example, VDTRDJ is currently defined in a data structure in the Transfer Order Entry program (P4242). It is defined as V@TRDJ in DSIIMP.

0121.40	IDSIIIMP	DS			
0121.50	I		1	8	V@TRDJ

```

C*
C*      Import values from CSV file
C*
C          EXSR C00I1
C*
C          ##IERC      IFEQ ' '
C          SETON
C          $SCRN      IFEQ ' '

```

The import process places data in DSIIMP. V@TRDJ contains the correct value. You must add code to move this to VDTRDJ.

```

C          EXSR S995

CSR      S995      BEGSR
C*      ----      -----
C*
CSR      MOVE V@TRDJ  VDTRDJ

```

After changing the printer file for batch export, update the form width accordingly before compiling to accommodate the data you add.

Before running the report for batch export, verify the printer overrides as the form width should be the same as the report width, before changes. The export program adds six characters to the width to accommodate the data you add.

If the video/report contains two header rows and if a heading on one row spans more than one column in the second row, you should split that header field into multiple fields. For example:

Forecast	Request	Quantity	
Type	Date	Adjusted	Original
BF	01/31/97	138	138
BF	02/28/97	164	164

**BEFORE IMAGE**

Forecast	Request	Quantity	Quantity
Type	Date	Adjusted	Original
BF	01/15/98	1000	1000
BF	01/15/98	100	100

**AFTER IMAGE**

---

---

## Appendix E – Attachment Links

If you use IBM iSeries Access for Windows, you can use the URL hotspot feature. This feature allows you to access URLs, documents, and e-mail addresses. You can also use Attachment Links in JD Edwards World using Web Enablement.

In Web Enablement, Attachment Links accommodate single embedded spaces in a text string and the system recognizes the subsequent text as part of an Attachment Link. You activate an Attachment Link by clicking on the links in the header portion of the screen or you can right-click on the text string.

In IBM iSeries Access for Windows, an Attachment Link does not accommodate embedded spaces and you must double-click on the text string to activate the link.

See *Working with Links* the *Web Enablement User Guide* for more information about links.

See the IBM iSeries Access for Windows Personal Communications Help for more information on URL hotspots. This information is also available on the following web site:

[http://publib.boulder.ibm.com/infocenter/pcomhelp/v5r9/index.jsp?topic=/com.ibm.pcomm.doc/books/html/quick\\_beginnings10.htm](http://publib.boulder.ibm.com/infocenter/pcomhelp/v5r9/index.jsp?topic=/com.ibm.pcomm.doc/books/html/quick_beginnings10.htm)





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