JD Edwards EnterpriseOne Tools

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Preface

Welcome to the JD Edwards EnterpriseOne Tools Solution Explorer Guide.

Audience

This guide is intended for system administrators who are responsible for setting up tasks, task views, and task view roles.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Computer desktop application usage and terminology.

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Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages. Access the main documentation overview page by searching for the document ID, which is 876932.1, or by using this link:

https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=876932.1

To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

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

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Indicates field values.
Italics	Indicates emphasis and JD Edwards EnterpriseOne or other book-length publication titles.
`Monospace`	Indicates a JD Edwards EnterpriseOne program, other code example, or URL.

1

Introduction to JD Edwards EnterpriseOne Solution Explorer

This chapter contains the following topics:

- Section 1.1, "JD Edwards EnterpriseOne Solution Explorer Overview"
- Section 1.2, "JD Edwards EnterpriseOne Solution Explorer Implementation"

1.1 JD Edwards EnterpriseOne Solution Explorer Overview

Oracle's JD Edwards EnterpriseOne Solution Explorer provides you with a convenient method for accessing Windows-based JD Edwards EnterpriseOne applications, and creating/maintaining JD Edwards EnterpriseOne task views for Web or Windows.

JD Edwards EnterpriseOne Solution Explorer is comprised of the following three modes:

- Menu Design Mode

  Use the Menu Design Mode to set up menus, tasks, task views, and task view roles.

- Menu Filtering Mode

  Use the Menu Filter Mode to enable and disable tasks users assigned a certain role can perform.

- Task Launching Mode

  Use the Task Launching Mode to navigate to development and administrative applications in JD Edwards EnterpriseOne using the Fast Path, or using the menu.

1.2 JD Edwards EnterpriseOne Solution Explorer Implementation

This section provides an overview of the steps that are required to implement JD Edwards EnterpriseOne Solution Explorer.

In the planning phase of your implementation, take advantage of all JD Edwards sources of information, including the installation guides and troubleshooting information.

1.2.1 JD Edwards EnterpriseOne Solution Explorer Implementation Steps

This list displays the steps for the JD Edwards EnterpriseOne Solution Explorer implementation.

- Set up task views.

See Understanding How to Set Up Task Views.

- Set up tasks.

  See Setting Up Tasks.

- Set up task view roles.

  See Applying Roles to a Task.

2

Using the Menu Design Mode

This chapter contains the following topics:

- Section 2.1, "Understanding the Menu Design Mode"
- Section 2.2, "Understanding How to Set Up Task Views"
- Section 2.3, "Working with Task Views"
- Section 2.4, "Setting Up Tasks"

2.1 Understanding the Menu Design Mode

Use the Menu Design Mode to set up menus, tasks, task views, and task view roles in JD Edwards EnterpriseOne Solution Explorer. Access Menu Design Mode by depressing the Menu Design Mode button located on the toolbar. Whether or not you have access to Menu Design Mode, and the type of access you have, depends on the permissions you have been assigned. You might be able to view Menu Design Mode, you might be able to make changes in Menu Design Mode, or you might not have access to it at all.

2.2 Understanding How to Set Up Task Views

Task views are groups of tasks arranged in a hierarchical tree structure. Tasks are the most discrete units in the JD Edwards EnterpriseOne Solution Explorer. Tasks are organized into hierarchical tree structures inside of task views. JD Edwards EnterpriseOne provides thousands of tasks, and you can add more of your own. When placed in a single task view, finding a specific task among thousands might be difficult and time-consuming.

JD Edwards EnterpriseOne Solution Explorer enables you to design many different task views, each displaying only some of the tasks in the system.

Typically, tasks are grouped in a task view because they relate to a common business system, process, or function. Logical selection and grouping of tasks in this way can help users find the functions that they need.

2.3 Working with Task Views

This section provides an overview of working with task views and describes how to:

- Create a new task view.
- Change a task view.
- Delete a task view.

2.3.1 Creating a New Task View

Create a new task view when you want to create a new category of tasks that you use to insert tasks and build task relationships. The tasks views that you create, design, and filter in JD Edwards EnterpriseOne Solution Explorer become part of the EnterpriseOne Menus in the JD Edwards EnterpriseOne Web Client.

Access JD Edwards EnterpriseOne Solution Explorer.

1. In JD Edwards EnterpriseOne Solution Explorer, select Add New Task View from the Tools menu.
2. In Task View Revisions, complete the following fields and options, and then click OK:
   - Task View

     Enter an internal ID for the task view. The ID must be between two and five digits and cannot contain alphabetic characters. If you start the ID with more than one zero, the system truncates it to a single zero. For example, if you type 005 as an ID, the system changes the ID to 05.
   - Name
   - Description

     The name and the description do not have to be the same.
   - Secured Task View

2.3.2 Changing a Task View

You can modify an existing task view. For example, you might want to change the name of a task view so that it more accurately reflects the category of tasks in that view.

Access JD Edwards EnterpriseOne Solution Explorer.

1. In JD Edwards EnterpriseOne Solution Explorer, select Work With Tasks from the Tools menu.

   Alternately, if you want to change the current task view, right-click the top task view node and select Task Revisions from the menu. Skip to step 5.
2. In Work with Tasks, select Task Views from the Form menu.
3. In Work with Task Views, click Find.

   Use the QBE row to refine your search.
4. Select the task view that you want to change, and then click Select.
5. In Task View Revisions, change any of the following fields and options, and then click OK:
   - Name
   - Description

     The name and the description do not have to be the same.
   - Secured Task View

2.3.3 Deleting a Task View

You can delete any task view from the system. Deleting a task view does not delete the tasks within the view from the system, however.

Access JD Edwards EnterpriseOne Solution Explorer.

1. In JD Edwards EnterpriseOne Solution Explorer, select Work With Tasks from the Tools menu.
2. In Work with Tasks, select Task Views from the Form menu.
3. In Work with Task Views, click Find.

   Use the QBE row to refine your search.
4. Select a task view, and then click Delete.
5. In Confirm Delete, click OK.

2.4 Setting Up Tasks

This section provides an overview of task setup and discusses how to:

- Create tasks.
- Insert existing tasks.
- Apply roles to tasks.
- Change tasks.
- Delete tasks.

2.4.1 Understanding Task Set Up

To design and manage your system, you work with *tasks*, which are units of work that you use to build essential business processes. Tasks can be interactive programs, batch programs, workflows UDSs, and so on. You work with tasks in a JD Edwards EnterpriseOne Solution Explorer task view, which is a collection of related tasks that are hierarchically grouped in parent-child relationships and illustrated graphically by the task view menu. These task groups usually represent the steps in an essential business process such as Procure to Pay.

JD Edwards EnterpriseOne provides a large selection of tasks that are already grouped in relationships within different task views. You can modify already existing tasks and their relationships. You can also create new tasks, task relationships, and views.

Within a task view, you insert new or existing tasks and arrange the tasks in logical sequences. You create or revise tasks on an ongoing basis, and then insert them in a task view as necessary to build and enhance your business processes. The processes are fluid; that is, you can drag and drop tasks and task relationships to change the relationships and the order in which you perform tasks.

The system stores each task in a task view in the Task Master table (F9000) and assigns a unique ID to each one. Each task is a reusable object that you can insert into an existing task relationship, or you can use as a basis for creating a new task relationship. After you have inserted a task in a task view, you can move it, revise it, write documentation for it, set up processing options, set up versions, and locate it. You can accomplish any of these functions in a JD Edwards EnterpriseOne Solution Explorer task view by launching interactive programs or using features and functions that are included in JD Edwards EnterpriseOne Solution Explorer.

2.4.2 Finding JD Edwards EnterpriseOne Solution Explorer Task and Task Relationship Changes in Object Management Workbench

When you change tasks or task relationships in JD Edwards EnterpriseOne Solution Explorer, the change is logged in Object Management Workbench (OMW). If you have added or deleted tasks or task relationships, the information is stored in OMW so that you and others can easily find the tasks and task relationships that have changed. If you changed task properties from within the Work With Tasks program (P9000), the task is logged in OMW.

Note: For your changes to be logged in OMW, your system administrator must have turned on OMW logging in the Security Workbench program (P00950) for your user ID. To determine whether your OMW logging is turned on, double-click the padlock button on the JD Edwards EnterpriseOne Solution Explorer status bar.

See Also:

- Creating a New Task View.
- Applying Roles to a Task.

2.4.3 Creating a Task

The tasks in task views are reusable objects that add to the flexibility of the JD Edwards EnterpriseOne Solution Explorer. Tasks reside in the Task Master table (F9000).

You can create a new task directly in the JD Edwards EnterpriseOne Solution Explorer by inserting a new task in a task view menu. You define the task using the Task Revisions form. When you create a task, you automatically create a relationship between the new child task and the parent task under which you inserted the new task.

Access JD Edwards EnterpriseOne Solution Explorer.

1. From Menu Design mode, right-click a folder and click Insert New Task from the menu.

   The Task Revisions application displays.

2. In Task Revisions, complete the Task Name field.

   If you accept upgrades or updates from JD EnterpriseOne, Solution Explorer will remove any custom tasks that you have created if you have named the tasks with a prefix JDE, BPM, or RMB. Make sure as you create new tasks that you use a prefix different than the ones listed here so that your custom tasks remain viable if an upgrade or update is performed on your system.

3. Select the Common tab, and then complete the following fields:
   - Product Code
   - Jargon
   - Country Code

Leave this field blank if you want this task to be available for all users, regardless of their country codes. Otherwise, enter the country code that must be assigned to users before they can access this task.

4. Select the Executable tab, and then select one of the following task type options:
   - Interactive

     Select this option for a task that launches an interactive JD Edwards EnterpriseOne program.
   - Batch

     Turn on this option for a task that launches a JD Edwards EnterpriseOne batch program.
   - URL

     Turn on this option for a task that launches a web page.
   - Folder

     Turn on this option for a task to be used as an activity or nonsoftware placeholder in a task view. This task does not execute a function, but might have accompanying documentation that describes the activity.
   - User Defined Code

     Turn on this option for a task that launches a program that enables a user to modify UDC tables.
   - EnterpriseOne Workflow

     Turn on this option for a task that displays workflow processes.
5. If you turned on the Interactive option, complete the following fields:
   - Application

     Enter the object name of the program.
   - Version

     Complete this field only if you want to launch a specific version of a program. Click the Visual Assist to search for a version.
   - Form

     This is an optional field. To open a specific form in the program, enter the form ID. Click the Visual Assist to search for a form.
   - Option Code
   - Form Mode
   - Application Type
6. If you turned on the Batch option, complete the following steps:
   - Application
   - Version

     This is an optional field. To launch a specific version of a batch program, enter the version.
7. Select one of the following options:
   - No Processing Options

Turn on this option to execute the batch program without processing options.

- Blind Execution

  Turn on this option to execute the batch program without displaying its processing options.

- Prompt for Version

  Select this option if you want to prompt the user to select which version of the batch program to run at execution.

- Prompt for Values

  Select this option if you want to prompt the user to enter processing option values at execution.

- Data Selection

  Select this option if you want to prompt the user to enter data selection at execution.

- Data Selection and Values

  Select this option if you want to prompt the user to enter data selection and processing option values at execution.

8. If you turned on the URL option, complete the URL fields.
9. If you turned on the User Defined Code option, complete the following fields:
   - Product Code
   - User Defined Codes
10. To apply roles to the task, select Roles from the Form menu.
11. In Task Where Used, select the role that you want to apply to the task, and then select Change Status from the Row menu.

    A check mark appears to indicate that the role is applied to the task. To remove a check mark, select Change Status from the Row menu again. To apply all roles to the task, select Enable All from the Form menu.
12. Click Close.
13. In Task Revisions, click OK.

2.4.4 Inserting an Existing Task

When you insert a task and thereby create a task relationship, the system stores the parent-child relationship that you create in the Task Relationships table (F9001). The system also stores the task view into which you inserted the task.

Because tasks are reusable objects, you can insert the same task into multiple task views.

Access a task view in JD Edwards EnterpriseOne Solution Explorer.

1. In a task view of JD Edwards EnterpriseOne Solution Explorer, select a task that will be the parent of the task that you want to insert.
2. Right-click the parent task, and then select Insert Existing Task from the menu.

   The Task Relationship Revisions form appears. The form displays the parent task ID and all tasks that are children of the parent task that you selected.

3. In Task Relationship Revisions, click a new line, and complete the following required fields:
   - Child Task ID
   - Presentation Sequence

     If you want the task that you are inserting to appear in a position other than last in the presentation sequence, change the number.
4. Complete any of the optional fields.

2.4.5 Applying Roles to a Task

You apply roles to tasks so that the tasks will be filtered properly in role-based task views. You can apply one or more roles to each task.

When a user launches a role-based task view, the system applies his or her login role to the view. If the system administrator has applied other roles to that user, he or she can view the task view by any of those roles to see a different set of tasks.

For example, a user might have two roles, General Accounting Clerk (the user's sign on role) and Accounts Payable Clerk. When the user launches a role-based task view, the system displays only those tasks to which the General Account Clerk role has been applied, such as Autoreconcile Void Payments, Autoreconcile Void Receipts, and Refresh Reconciliations File. The user can apply the Accounts Payable Clerk role to the task view, and the system displays only those tasks to which the Accounts Payable Clerk role has been applied, such as Speed Status Change, Create Payment Groups, and Work with Payments.

Users can switch roles only if they sign on to JD Edwards EnterpriseOne Solution Explorer with the *ALL role. If a user signs on with the *ALL role and then accesses a role-based task view, then the user can view all tasks that are visible to any of the roles assigned to the *ALL role.

For example, the *ALL role contains Role1 and Role2, but not Role3. When a user accesses a role-based task view, JD Edwards EnterpriseOne Solution Explorer displays all of the tasks that are available in Role1 or Role2. Tasks that are only available to Role 3 do not appear.

To apply roles to a task:

1. Select the task to which you want to apply roles.
2. Right-click the task, and then select Task Revisions.
3. In Task Revisions, select Roles from the Form menu.
4. In Task Where Used, click Find.
5. Select the parent of the task to which you want to apply roles, and then click Select.
6. In Role Definition, select the role to which you want to apply to the task, and then select Change Status from the Row menu.

   A check mark appears to indicate that a role is applied to the task. To remove a check mark, select Change Status from the Row menu again. To apply all roles to the task, select Enable All from the Form menu.
7. Click Close.
8. In Task Revisions, click OK.

2.4.6 Changing a Task

When you change a task using this process, you affect all instances of the task in all task views where it resides.

Access a task view in JD Edwards EnterpriseOne Solution Explorer.

1. In Menu Design Mode, select the task that you want to change.
2. Right-click the task, and then select Task Revisions from the popup menu.
3. In Task Revisions, complete any changes that you want to make to the task, and then click OK.

2.4.7 Deleting Tasks

You can delete an instance of a task from a task view menu. However, performing this action does not delete the task itself; it merely eliminates the task from the task view. To delete a task from the system entirely, you must use the Work With Tasks program (P9000) to locate the task and then delete it from the Task Master table (F9000). You can delete a task from a task view. Doing so deletes the task only from the task view; it still exists in the Task Master table (F9000) and in any other relationship in which it has been inserted. Furthermore, you can still insert it into other task menus.

2.4.7.1 Deleting an Instance of a Task

Access a task view in JD Edwards EnterpriseOne Solution Explorer.

1. In JD Edwards EnterpriseOne Solution Explorer, open the task view that contains the task relationship that you want to delete.
2. Right-click the task that you want to delete, and then select Delete Relationship from the menu.
3. In Delete Relationship, click OK.

2.4.7.2 Deleting a Task from the Task Master Table (F9000)

To delete a task from the system completely, you must delete it from the Task Master table. Before you can do so, however, you must first delete all of the relationships for the task. This is equivalent to deleting the task in each task view menu in which it appears.

Access JD Edwards EnterpriseOne Solution Explorer.

1. In JD Edwards EnterpriseOne Solution Explorer, select Work With Tasks from the Tools menu.
2. Click Find.

   Use the QBE row to refine your search.
3. Select the task that you want to delete, and then select Where Used from the Row menu.
4. In Task where Used, search for the parent of the current task by clicking Find.

   The task might have more than one parent. If so, all of the parents appear.
5. Select the parent of the task that you want to delete, and then click Delete.
6. In Task Relationship Revisions, select the task that you want to delete, and then click Delete.
7. In Confirm Delete, click OK.

8. Click OK.
9. Repeat steps 5-8 for each parent of the task in the list.
10. In Task where Used, click Close.
11. In Work With Tasks, select the task that you want to delete, and then click Delete.
12. In Confirm Delete, click OK.

2.4.8 Clearing Cache

When you create, delete, or modify menus in JD Edwards EnterpriseOne Solution Explorer, they are saved to the same database from which the web client retrieves them. The web client stores them in a cache directory and then displays them in the JD Edwards EnterpriseOne Menu. To display new or modified menus, you must clear the cache directory. You clear the cache directory through Server Administration Workbench (SAW).

Access Server Administration Workbench.

1. Access and sign in SAW for HTML Servers.
2. From the Views menu, click Config.
3. Click Clear JD Edwards EnterpriseOne Menu Cache.
4. Open the web client.
5. Click the Menu Refresh button located on the JD Edwards EnterpriseOne Menu title bar.

3

Using the Menu Filtering Mode

This chapter contains the following topics:

- Section 3.1, "Understanding Menu Filtering"

3.1 Understanding Menu Filtering

Menu Filtering is the process that you use to selectively enable or disable tasks by role in a task view.

Access JD Edwards EnterpriseOne Solution Explorer.

1. In JD Edwards EnterpriseOne Solution Explorer, depress the Menu Filtering button.
2. Select the task view that you want to refine.

   The system changes the task view menu display to indicate enabled and disabled tasks. Enabled tasks are indicated by a green check mark; disabled tasks are indicated by a red X
3. Expand the task tree in the task view to find a task that you want to enable or disable, and then select a task.
4. Click either the Enable or Disable button on the Toolbar.

   You can also double-click the task to toggle between the enabled and disabled conditions.
5. Repeat steps 2-3 for each task you want to enable or disable.
6. When you have finished refining the task list, click the Save button on the toolbar.

   Saving your configuration saves your changes to the Master Task Relationship table (F9001), so your changes will be available to all users who access that same database. JD Edwards EnterpriseOne Solution Explorer will prompt you to select the role to which your changes apply.

   If you fail to save the changes, your changes will not remain when you exit from the JD Edwards EnterpriseOne Solution Explorer and then launch it again later.
7. Click the Show All in Menu Design mode button to toggle between hiding and displaying disabled tasks in the current task view menu for the currently selected role. This role is displayed beside the root node of the task view.

3.1.1 Setting Up Menus with *ALL Role Filtering Considerations

The *ALL role enables users to view a concatenation of all tasks that are available in any role that is assigned to the *ALL role in a single menu tree. JD Edwards

recommends that you consider the information in this section as you design and plan your menus. These recommendations enable the filtering process to run more efficiently.

3.1.1.1 Understanding how *ALL Role Filters Tasks

When you set up menu filtering you can disable both single tasks and entire folders. If you disable a folder, all the tasks and subfolders within it are disabled. Any tasks that are disabled in every role included in the *ALL role will be filtered out of the menu tree in the web client when a user logs in using the *ALL role. If at least one role in the *ALL role has a task enabled, that task will display in the EnterpriseOne menu.

As the system processes each role during filtering, it stops processing and displays the task as soon as it finds a role in which the task is not disabled. Therefore, when you disable tasks, JD Edwards recommends that you sequence the roles in the order of the level of security, with the first role having the fewest disabled tasks (for example, the role that has the greatest access to functionality in the system). If you sequence your roles so that those with the least amount of disabled tasks are first, then the filtering process will take less time to complete.

3.1.1.2 Deciding How Many Roles to Assign Users

The system filters menus when users open a task view or expand a folder. If a user is assigned many roles and a depth of many imbedded tasks, they might want to sign into EnterpriseOne using the *ALL role, but switch to a specific role before opening a task view. This will decrease the amount of time for the filtering process.

When setting up menu filtering, consider the number of roles that each user requires. JD Edwards recommends that you keep the number of roles to a minimum. Increasing the number of roles increases the amount of time it takes to filter the tasks when users choose the *ALL (All My Roles) in the web client.

3.1.2 Understanding Task View Roles

You can use roles to customize certain task views or parts of task views for specific user groups. Roles define a subset of the tasks in the original task view. They enable you to customize and simplify task views for the end user.

Roles apply only to users who have access to those roles.

You can use roles to make different versions of task objects available to users, and you can vary the descriptions of the tasks, as well.

3.1.3 Filtering a Task View by Role

To filter a task view by role, you refine the task view using the Menu Filtering mode, and then save the results. You define the role or based on your needs analysis of the users.

Access a task view in JD Edwards EnterpriseOne Solution Explorer.

1. In a task view of JD Edwards EnterpriseOne Solution Explorer, click the Menu Filtering button on the Toolbar.
2. Select a parent task and expand the task tree to expose tasks that you want to disable.
3. Select each task that you want to disable, and then click the Disable button.
4. After you have disabled all of the tasks that you do not want to appear in the role, select the parent task.

5. Right-click and then select Save Role, or click the Save button on the tool bar.
6. In Save Role, select an existing role and then click Select, or create a new role.

See Also: ■"Adding Users to a Role" in the *JD Edwards EnterpriseOne Tools Security Administration Guide*.

3.1.4 Changing a Role's View of a Task View

By modifying roles, you can control users' task view. Changing the name and version for the role helps you and other users understand the difference between different roles. The changes that you make to the role, such as assigning new task names, apply only to that role. The system preserves the properties that define the default task view. You are not replacing the original view; you are creating an alternative view to be used in specific situations that your business requires.

Access JD Edwards EnterpriseOne Solution Explorer.

1. In a JD Edwards EnterpriseOne Solution Explorer task view, click the Menu Filtering button on the Toolbar.
2. Right-click any task in the task view, and then select View By Role from the menu.
3. In View by Role, select the role to which you want to change, and then click Select.
4. Double-click a task to make its relationship active or inactive, or right-click a task in the task view and select Override Name to change the task name.
5. Right-click any task and select Save Role.
6. Select the role, and then click Select.

4

Using the Task Launching Mode

The Task Launching Mode is the default mode for JD Edwards EnterpriseOne Solution Explorer. Use the Task launching mode to navigate to the windows applications either through the menu or through the Fast Path.

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