PeopleSoft

EnterpriseOne JDE5 Solution Explorer PeopleBook

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Solution Explorer

Solution Explorer provides you with a convenient window into J.D. Edwards software. The system is designed to be a flexible, customizable system that can adapt to your business needs and offer a permanent solution to the problem of adapting to changing conditions and requirements.

Key attributes that distinguish Solution Explorer include:

- Ease of navigation. Solution Explorer offers a convenient, web-browser-based, customizable gateway to all features and to any internal or external web site. Using task views, you can create and use shortcuts to further speed your navigation and shorten your work time. Find It! allows you to quickly search for the programs that you need to do your work.
- Flexibility. Reusable units of work, called tasks, are at the core of the Solution Explorer. You use these tasks as the basis to model and to create business and technical processes that can be modified without costly changes to the system.
- Configurability. You can set up the system so that it displays only the tasks and processes that you need for your daily work. You can enable and disable tasks and create variations on processes to reflect the needs of the system's users.
- Ease of use. Solution Explorer allows you to create special tasks, called activators, to build key business and technical processes without hard-coding form interconnections. Activators launch the Universal Director, which provides a graphical interface for the entire process you create and facilitates passing data between forms. The Universal Director also presents the steps included in a process in an easy-to-read format.
- Compatibility. The Solution Explorer architecture permits software developers and integration partners to produce custom activators that are compatible with both third-party software applications and with J.D. Edwards software.
- Accountability. Documentation exists for most tasks in Solution Explorer, which eliminates guesswork when you encounter a task. You can also create your own documentation for new tasks. Documentation means that information about tasks is readily accessible, even as people come and go within your organization.

How to Use This Guide

An important fact about Solution Explorer is that different users with different needs can use it in many different ways. An end user who is performing business tasks such as journal entry will be most concerned with finding easy access to the tasks necessary to complete the job. Such a user will access Solution Explorer through the Home Page. This user will not be concerned with customizing the Solution Explorer.

Users who want to quickly acquaint themselves with Solution Explorer's interface and understand in general terms the meaning of the content in the various components of the interface can review the *Solution Explorer* section in the *Foundations* guide.

System administrators will be most concerned with setting up and maintaining system security. These users will need to skim the various sections to acquaint themselves with the basic structure of Solution Explorer, and then review the *Security* section in the *System Administration* guide

Solution Explorer Terminology at a Glance

This guide explains in detail the concepts behind Solution Explorer. The following table briefly defines the most essential Solution Explorer terms.

Solution Explorer Term	Definition

Home Page	A URL whose contents first appear when the user launches the Solution Explorer. You can set the URL by configuring the jde.ini file as shown below. In this example, the home page is configured to display the J.D. Edwards Portal.
	`[EXPLORER]`
	`JASWebServer = "toolsjass1"`
	`JASPortalURL="http://toolsjass1/jdeowportal"`
	`JASForceEnv=`
	`ExplorerHomeURL="toolsjass1/jde/portal"`
	`ExplorerStart=home`
	You can also configure the home page to display the last task the user viewed by setting `ExplorerStart=`*task.* To define a specific task view, set `ExplorerStart=`*task:1234,* where *1234* is the task view identifier.

Solution Explorer	A configurable Explorer for J.D. Edwards software and related objects that includes task content, when available.
Tasks	Units of work that you use to build essential business processes. Tasks can be interactive applications, batch applications, constants, next numbers, Windows executables, and so on.
Task relationships	Series of tasks arranged in parent-child relationships that form business processes such as Procure to Pay.
Task views	Collections of related task relationships, which appear in Solution Explorer.
Task links	Shortcuts from one relationship to another. The linked task appears in a secondary window in Solution Explorer.
Activators	Special tasks that you use to launch the Universal Director. Activators link logically together series of tasks; they allow business and technical professionals to make "on-the-fly" system changes and avoid costly down time.
Universal Director	A graphic user interface that the system launches when you access a task activator. The Universal Director provides a coherent framework for work with activators as well as the mechanism for passing data between the J.D. Edwards software forms required for completing the activator.
Rough Cut	The process you use to create a high level task view configuration. Using Rough Cut, you establish criteria the system uses to enable or disable tasks and task relationships. Rough Cut question tasks are categories of tasks; Rough Cut answers are the allowable values for each category.
Qualifier rules	Qualifier rules are if-then statements that you create, apply and use in conjunction with Rough Cut as the basis for enabling or disabling tasks. The system compares answers to Rough Cut questions to the criteria of the qualifier rules for each task and generates a batch process to enable or disable tasks based on the comparison.

Fine Cut	The process you use to selectively enable or disable tasks in a task view after you have created a task view configuration using Rough Cut.
Task relationship variants	A variation on a task relationship that you create using Fine Cut. In creating the variant you selectively disable tasks in the relationship, then save the variant. The system stores the variant, which you can activate as an alternative to the default task relationship.

Setting Up the Home Page for the Solution Explorer

The Home Page is generally the first screen a users sees when logging into the Solution Explorer. This screen can be used to display information relevant to end users in the enterprise. It can be an external web site, an intranet site, or even HTML files stored on any server or network.

During the installation process, a directory called PortalLite is created when the deployment server is installed. This directory resides in the <*baseinstall*>\ActivEra™\ProtaLite directory and includes a set of html files that make up the default Home Page. Even thought this directory is on the deployment server, it can reside anywhere on the network – such as on a web server or even locally on a workstation.

When the OneWorld® client is installed, the system updates the client jde.ini to point to the location of the PortaLite directory. For example, if the name of the deployment server is "DepServer1" and the share name is "B7333", the [Explorer] section of the jde.ini is updated as follows:

```
[Explorer]

ExplorerHomeURL=”\\DepServer1\b7333\activEra\portallite\index.html

ExplorerStart=INTERNET
```

You can change the above parameters in the jde.ini file to display any html file or URL as the default Home Page. The table below describes these parameters:

[Explorer] Parameter	Description
ExplorerHomeURL=	URL or filename of the Home Page that is displayed when the user logs on. By default, the initial page is \\Depserver1\b7333\activera\portalite\index.html.
ExplorerStart=	Valid values are: INTERNET: This is the default value. When you start the Solution Explorer, it displays the internet view first. TASK: When you start the Solution Explorer, it displays the last task view the user viewed. To display a specific task view, set ExplorerStart=TASK:xx, where xx is the task view's task ID.

Task Views

Initial Configuration

After installing J.D. Edwards software, launch the Solution Explorer, and then access the Getting Started task view. This task view orients you to the Solution Explorer. Your next step is to access the Implementation Approach task view. This task view provides a detailed implementation strategy that guides you through the J.D. Edwards software configuration and implementation process. The Implementation Approach task view represents information gathered from numerous implementation experts. When using these task views, make sure the Documentation window is visible. Documentation on how to use these task views appear in the Documentation window when you launch each task view.

Note

The Application Set Up Tasks Tasks task view is closely related to the Implementation Approach task view. You will probably never work with the Application Set Up Tasks Tasks task view on its own; it contains numerous link target tasks from the Implementation Approach task view that can simplify the implementation software tasks you need to perform.

While implementing J.D. Edwards software, one of the first steps in setting up the Solution Explorer is defining your business within the system to help determine which OneWorld tasks will be available to your users. To do this, you use a utility called Rough Cut. Rough Cut contains a list of descriptors that can be applied to business systems. Choosing some values and not others helps you to configure Solution Explorer so that it will display only those tasks that users need to do their work.

For example, your system might be built purely around automotives. Consequently, you would select only *Automotive* from the Rough Cut category *Industry.* By doing so, you provide the system with information so that it can disable certain tasks that your automotive business would not use, such as pharmaceutical tracking processes.

The results generated by Rough Cut (enabling and disabling tasks) are reflected in all of the Solution Explorer task views. After using Rough Cut, you use another utility, Fine Cut, to refine the configuration. As your business changes over time, you will continue to use Fine Cut to enable and disable applicable tasks.

Rough Cut consists of lists of categories (also known as questions), arranged in a hierarchical menu structure. Each category contains multiple values.

Performing the Initial Configuration

You perform the initial configuration for your system using Rough Cut. Rough Cut displays information categories that broadly define a business system. You select which categories are applicable to your business system. Based on how you define your system in Rough Cut, the system enables certain tasks and disables others. Then you use Fine Cut to override the system's suggestions where necessary.

Defining your business system in OneWorld need not occur within a single session. You can save your work at any time and return to Rough Cut later to continue, if necessary. The system stores your selections in the Environment Setup Answers table (F9010).

See Also

- *Refining the Configuration* for information on using Fine Cut to refine Rough Cut results

► To perform the initial configuration

1. In the Solution Explorer, choose Rough Cut from the Tools menu.

   The Rough Cut task view appears.

2. Expand a Rough Cut category, such as Select Required Software Products, and choose the categories that apply to your business system.

   The default is that all of the categories are selected.

   Many categories have subcategories. Parent categories can be symbolized with a book icon or with a checkbox. Choosing a parent-level checkbox selects all of its children.

3. Continue through all of the categories, checking those items that are applicable to your system and leaving blank those that are not.
4. Click the Save Data button on the Toolbar.

   You can save your work at any time. However, you must save before performing the next step.

5. Click the Idea to Action button on the Toolbar.
6. On Apply Rough Cut Answers, click Yes.

   The system analyzes all of the tasks in the system and enables or disables them based on your input. This process might take a few minutes.

Configuration Refinement

One of the initial configuration tasks for the Solution Explorer is to use Rough Cut to define your business system. Based on your choices, Rough Cut processes all of the OneWorld tasks and disables several tasks. To refine the initial configuration you use the utility called Fine Cut. After refinement, all of the tasks are appropriately enabled or disabled.

After your initial configuration, as your business changes over time, you can continue to use Fine Cut to enable and disable tasks as appropriate.

In Fine Cut, you selectively enable and disable tasks by choosing them and clicking buttons on the Toolbar. Then, when you execute Fine Cut, the system changes the properties of the affected tasks, which are stored in the Task Master table (F9000).

You can choose to hide or show tasks that you have disabled using Fine Cut by turning on or off the Show/Hide Disabled Tasks button on the Toolbar. The system enables this button after you turn Fine Cut off. Turning off the Show/Hide Disabled Tasks button hides disabled tasks from the task view and simplifies navigation.

However, you might choose to show disabled tasks if you want to keep track of all the tasks in a particular task view and their relationships, particularly if you plan on using Fine Cut frequently. If you click the Show/Hide Disabled Tasks button, the system displays the disabled tasks with a red X.

Hiding and showing disabled tasks affects how you see your task views only. If you choose to show disabled tasks, other users will not see the disabled tasks in their task views.

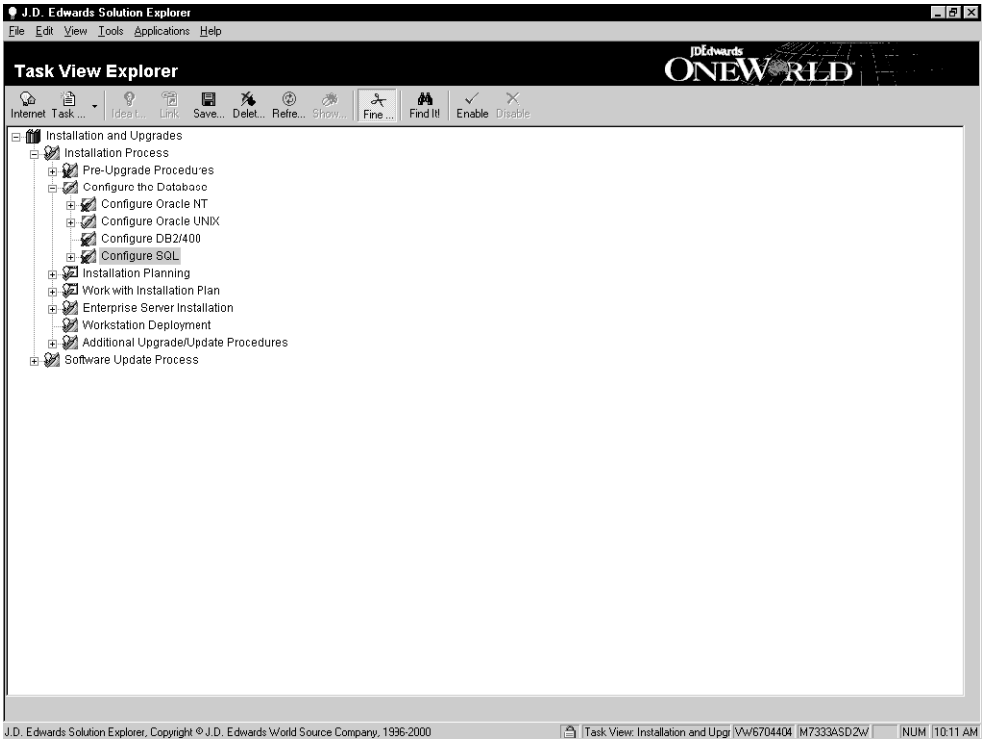
Refining the Configuration

You use Fine Cut to selectively enable or disable specific tasks in your implementation of the J.D. Edwards system.

► To refine the configuration

1. In the task view of Solution Explorer that you want to refine, click the Fine Cut button on the Toolbar.

   The system changes the task view menu to indicate enabled and disabled tasks. Enabled tasks are indicated by a green checkmark; disabled tasks are indicated by a red X.



2. Expand the task tree in the task view to find a task that you want to enable or disable.
3. 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 2-4 for each task you want to enable or disable.
6. When you have finished refining the task list, click the Save Data button.

If you fail to save the changes, the system cannot store the new parameters, and your changes will not remain if you exit the Solution Explorer and then launch it again later.

7. Click the Fine Cut button to exit Fine Cut mode.
8. Click the Show/Hide Disabled Tasks button to toggle between hiding and displaying disabled tasks in the current task view menu.

Task View Set Up

Tasks are the most discrete units in the Solution Explorer. Tasks are organized into hierarchical tree structures inside of task views. J.D. Edwards 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.

Instead of having only one task view in which all of the tasks in the system appear, the Solution Explorer allows you to have 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 make it easier for users to find the functions they need. You can further refine which tasks a user sees in a task view by designating a task view to be role based. Role based task views allow users to apply a role filter to the view that will display only those tasks associated with the role that the user applied. Users can only apply roles for which they have been granted access.

Additionally, you can prevent users who only have View access to the Solution Explorer from seeing task views you set as being secured.

See Also

- *Working with Task View Variants* for information about creating and modifying task menu variants
- *Task Set Up* for information about creating, working with, and documenting tasks
- *Working with Task Links* for information about creating links between tasks to aid navigation through task views

Working with Task Views

Task views are groups of tasks arranged in a hierarchical tree structure.

Creating a New Task View

Create a new task view if you want a new category of tasks to which you want to insert tasks and build task relationships.

See Also

- *Working with Tasks*
- *Creating a Task*

► **To create a new task view**

1. On Solution Explorer, choose Add a New Task View from the Tools menu.
2. On Task View Revisions, complete the following fields, and then click OK:

   - Task View

     Enter an internal ID for the Task View. The ID must be between two and five numbers long and cannot contain alpha characters. If you start the ID with more than one zero, the system will truncate it to a single zero. For example, if you input 005 as an ID, the system will change the number to 05.

   - Name

   - Description

     The name and the description do not have to be the same.

   - Secured Task View

   - Role Based Task View

     If you want users to be able to filter tasks in the task view based on their roles, select this option.

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.

See Also

- *Working with Task Views* for information about copying or moving task view menu nodes
- *Working with Task View Variants* for information about providing alternate views of task view menus and nodes
- *Working with Tasks* for information about copying, moving, and deleting tasks

► **To change a task view**

1. On Solution Explorer, choose 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 choose Task Revisions from the menu. Skip to step 5.

2. On Work with Tasks, choose Task Views from the Form menu.
3. On Work with Task Views, click Find.

   Use the QBE row to refine your search.

4. Choose the task view you want to change, and then click Select.
5. On Task View Revisions, change any of the following fields, and then click OK:

   - Name

- Description

  The name and the description do not have to be the same.

- Secured Task View

- Role Based Task View

  If you want users to be able to filter tasks in the task view based on their roles, select this option.

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.

See Also

- *Creating a New Task View* for information on securing task views from users who only have View access to the Solution Explorer
- *Deleting a Task* for information on removing tasks from the system

► To delete a task view

1. On Solution Explorer, choose Work With Tasks from the Tools menu.
2. On Work with Tasks, choose Task Views from the Form menu.
3. On Work with Task Views, click Find.

   Use the QBE row to refine your search.

4. Choose a task view, and then click Delete.
5. On Confirm Delete, click OK.

Working with Task View Variants

You might want to customize certain task views or parts of task views for specific user groups. The system allows you to do so with variants. A variant is a subset of the tasks in the original task view. Variants allow you to customize and simplify task views. You can create a variant of the entire task view by making a variant of the task view node (the first node at the top of the task view menu), or you can create a variant of any of the parent tasks in the task view.

You can use variants to make different versions of task objects available to users, and you can vary the descriptions of the tasks as well. Furthermore, when linking to a node that has one or more available variants, you can choose to link to the base view or to any of the variants instead. The variant does not replace the original task view menu; it is an alternate view which the user must apply and clear manually or that you can cause to be displayed as the target of a link. Note that if you create a variant of a specific node in the task view, the user must know which node to select to be able to apply the variant.

See Also

- *Working with Task Links* for information about linking tasks to help users move quickly from one task to another without searching for it
- *Working with Variant Task Views* in the *Foundation* guide for information about applying and clearing task view menu variants

Creating a Variant

To create a variant, you refine the task view using Fine Cut, then save the variant. You create the variant based on your needs analysis of the variant users.

► To create a variant

1. In a task view of Solution Explorer, click the Fine Cut 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 the tasks that you do not want to appear in the variant, select the parent task.
5. Right-click and choose Save Variant from the menu.
6. On Create New Variant, enter a name for the variant, and then click OK.

   The system saves your variant to the Variant Description (F9005) and the Variant Detail (F9006) tables. This operation might take a few minutes.

Changing a Variant

The ability to modify variants allows you an extra measure of control over the configuration of your Solution Explorer task view. Overriding the default task name and task version, for example, further differentiates a variant from the default version. Changing the name and version for the variant makes it easier for you and other users to understand the difference between the variant and the default view. You might want to work with a different application version than the default when you are in a variant view, and you can set that version with an override. After you have set the override, you do not have to change the version for the task in the variant again, unless you decide that you want to.

Keep in mind that the changes you make to the variant, such as assigning new task names, apply only to the variant. The system preserves the properties that define the default view. You are not replacing the original view; you are creating an alternative to be used in specific situations required by your business.

► To change a variant

1. In a task view of Solution Explorer, click the Fine Cut button on the Toolbar.
2. Select the parent task of the task relationship that has a variant.
3. Right-click the parent task, and then choose Manage Variants from the menu.
4. On Variant Name Search & Select, choose the variant you want to change, and then click Select.

   The Variant Definition form appears, displaying all of the child tasks under the current node.

Alternately, you can access the Variant Definition form from the Content Development Tools task view. Launch the Work With Variants task, and then find and select the variant you want to change.

5. Change the columns in the rows as desired, and then click OK:

   - Active
   - Override Task Name
   - Override Task Version

6. Close the Variant Name Search & Select form.
7. Click the Fine Cut button to exit Fine Cut Mode.

Deleting a Variant

You must use the Work with Variants application to delete a variant.

► To delete a variant

1. From the Content Development Tools task view, launch the Work With Variants task.
2. On Work with Variants, click Find.

   Use the QBE row to refine your search.

3. Choose the variant you want to delete, and then click Delete.
4. On Confirm Delete, click OK.

Task Set Up

To design and manage your system, you work with tasks—units of work that you use to build essential business processes. Tasks can be interactive applications, batch applications, constants, next numbers, Windows executables, and so on. You work with tasks in a Solution Explorer task view, which is a collection of related tasks hierarchically grouped in parent-child relationships, illustrated graphically by the task view menu. These task groups usually represent the steps in an essential business processes such as Procure to Pay.

J.D. Edwards provides a large selection of tasks which are already grouped in relationships within different task views. You can build on this base by modifying 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 to a task view as you deem necessary to build and enhance your business processes. The processes are fluid: 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 Solution Explorer task view, by launching interactive applications or using features and functions encompassed within Solution Explorer.

See Also

- *Task View Set Up* for information about creating and maintaining task views
- *Working with Task View Variants* for information about creating and modifying task view variants
- *Working with Task Links* for information about creating links between tasks to aid navigation through task views

Understanding Task Types

When you create a task, you will be able to classify it in one of several ways. Each type of task is represented in the task view menu with its own icon. The Solution Explorer task types are:

- Interactive
- Batch
- Windows
- Non-software
- Activity script
- User defined code
- Processing option
- AAI
- Constant
- Next number

Interactive

Use this category for interactive J.D. Edwards software applications (with the exceptions of AAI and Constant applications). When the user runs this task, the application launches. You can define which version and even which form you want the task to launch, if desired. You can also control whether the user is prompted for processing options and in what mode (default, add, update, delete) the form will open. This last parameter is typically used only when the task will be used in a Universal Director process.

Batch

Use this category for batch J.D. Edwards software applications (such as reports). When the user runs this task, the batch application is submitted for processing. You can define which version you want the task to launch. You can also control how the user is prompted to set processing options and data selection.

Windows

Use this category for Windows executable files. When the user executes this task, the system calls the Windows program. To use this option, you define the executable, its working directory, and the command-line parameters you want to pass to the program.

Non-Software

Use this category to create graphic placeholders in a task view. For example, you might want to group a number of procure to pay batch applications within the tree structure. You could create a non-software task called Procure to Pay Batch to act as the parent task and then place all of the batch-related tasks under it.

Activity Script

Use this category to define HTML-editable documents that are attached to Solution Modeler tasks.

User Defined Code

Define a task as a User Defined Code to access the Work with User Defined Codes form. The parameters you define for this task type (product code and UDC) are passed to the form so the user can work with the UDC set you specify.

Processing Option

Define a task as a processing option to bring up the processing options for the application you specify. You can also define the application version and the mode that the form appears in.

AAI

Use this category for interactive J.D. Edwards software applications affecting automatic accounting instructions. This type of task is identical to the Interactive task type except that its icon in the task view menu is different from the Interactive task type icon.

Constant

Use this category for interactive J.D. Edwards software applications affecting the constant values for a system. This type of task is identical to the Interactive task type except that its icon in the task view menu is different from the Interactive task type icon.

Next Number

Use this category to create a task that brings up the Set Up Next Numbers by System form when you execute it. This task type requires the product code of the system you want to affect.

Creating a Task

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

You can create a new task directly in the Solution Explorer by inserting a new task in a task view menu. You define the task with 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.

Before You Begin

- If you are creating a task to launch an object such as an application, the object must already exist in the system before you can create a task for it. For example, you might want to design a new report and then make it available for processing via a task in a task view. Before you create a task that launches a report, you must first design and check in the report.

► To create a task

1. In a task view, select the task that will be the parent of the task that you want to create.
2. Right-click the task and choose Insert New Task from the menu.
3. On Task Revisions, complete the following field.
   - Task Name
4. Click the Common tab, and then complete the following fields:
   - Product Code
   - Activator Type

     Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.
   - Client Platform

     Leave this field blank if the task you are creating runs on both Windows and Web clients. Otherwise, enter W to specify web client only, or C to specify Windows client only.
   - Country Code

     Leave this field blank if you want this task available for all users regardless of their country code. Otherwise, enter the country code users need assigned to access this task.
   - Required

     Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.
   - Active

Deactivating a task makes it unavailable to users in any task view. Generally, you will want to keep your new tasks active.

5. Click the Executable tab, and then choose a task type option.

Note

Many of the task type options require that you enter additional information. For example, if you choose Interactive as a task type, you must supply the object name for the application, the version, and form names, and set up processing options, if any.

- Interactive

  Select this option for a task that will launch an interactive J.D. Edwards software application.

- Application

  Enter the application's object name. Click the Visual Assist to search for an application.

- Version

  This is an optional field. To launch a specific version of an application, enter the version. Click the Visual Assist to search for a version.

- Form

  This is an optional field. To open a specific form in the application, enter the form ID. Click the Visual Assist to search for a form.

- Option Code

- Form Mode

  Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.

- Batch

  Select this option for a task that will launch a J.D. Edwards software batch application.

- Application

  Enter the batch application's object name. Click the Visual Assist to search for an application.

- Version

  This is an optional field. To launch a specific version of a batch application, enter the version. Click the Visual Assist to search for a version.

- No Processing Options

Select this option to execute the batch application without processing options.

- Blind Execution

  Select this option to execute the batch application 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 application 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.

- Windows

  Select this option for a task that will launch a Windows-based executable.

- Windows Executable

  Enter the executable name.

- Working Directory

  This is an optional field. Enter the directory where the executable resides.

- Executable Parameters

  This is an optional field. Enter any input commands, functions, or parameters you want to pass to the executable when it launches. Not all Windows executables accept parameters at launch.

- Non-Software

  Select this option for a task to be used as a placeholder in a task view. This task will not execute a function, but will be used to organize tasks in the tree.

- Activity Script

Select this option for a task to be used as HTML text to be attached to a modeler task.

- User Defined Code

  Select this option for a task that will launch the UDC application to allow a user to modify UDCs.

- Product Code
- User Defined Codes
- Processing Option

  Select this option for a task that will display processing options for an application.

- Application

  Enter the application's object name. Click the Visual Assist to search for an application.

- Version

  This is an optional field. To launch a specific version of an application, enter the version. Click the Visual Assist to search for a version.

- Option ID
- AAI

  Select this option for a task that will launch an automatic accounting instruction application.

- Application

  Enter the application's object name. Click the Visual Assist to search for an application.

- Version

  This is an optional field. To launch a specific version of an application, enter the version. Click the Visual Assist to search for a version.

- Form

  This is an optional field. To open a specific form in the application, enter the form ID. Click the Visual Assist to search for a form.

- Option Code
- Form Mode

Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.

- Constant

  Select this option for a task that will launch an application to allow the user to modify constants.

- Application

  Enter the application's object name. Click the Visual Assist to search for an application.

- Version

  This is an optional field. To launch a specific version of an application, enter the version. Click the Visual Assist to search for a version.

- Form

  This is an optional field. To open a specific form in the application, enter the form ID. Click the Visual Assist to search for a form.

- Option Code

- Form Mode

  Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.

- Next Number

  Use Next Number to launch the Set Up Next Numbers by System form.

- Product Code

6. Click the Resources tab, and then complete the following fields:

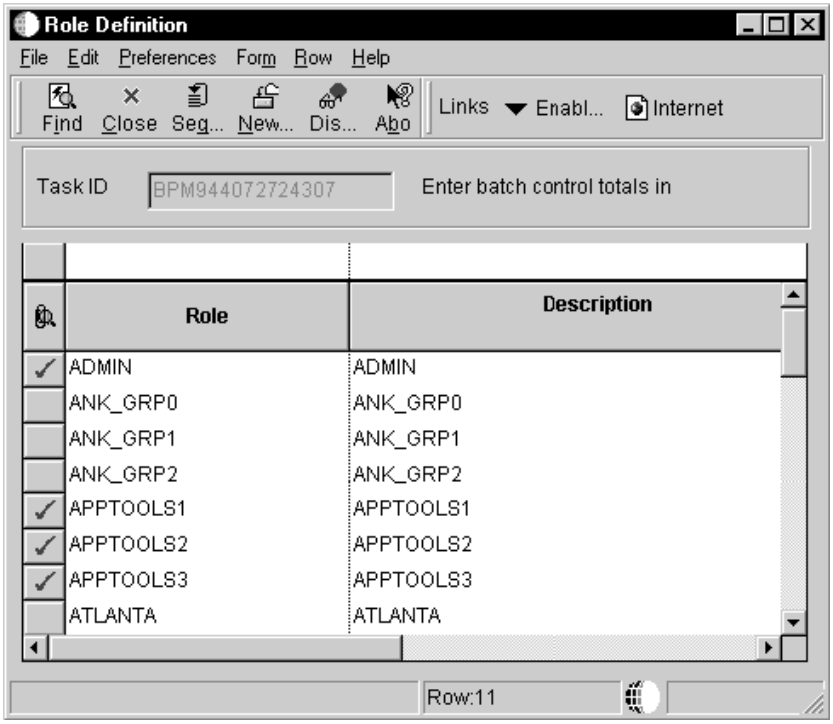
   - Base Resource

   - Base Units

   - Unit of Measure

7. To apply roles to the task, choose Roles from the Form menu.
8. On Role Definition, choose the role that you want to apply to the task, and then choose Change Status from the Row menu.

   A checkmark appears to indicate the role is applied to the task. To remove a checkmark, choose Change Status from the Row menu again. To apply all roles to the task, choose Enable All from the Form menu.



9. Click Close.
10. On Task Revisions, click OK.

Working with Tasks

The tasks in task views are reusable objects, which adds to the flexibility of the Solution Explorer. Not only can you create tasks and insert them into the appropriate task view; you can build tasks into task relationships that represent key business processes. You can also move tasks freely within a task view by dragging and dropping them into the appropriate task relationship. You can revise task properties, set processing options and interactive versions, and reuse the same task in as many different task relationships as necessary.

Tasks reside in the Task Master table (F9000).

Inserting an Existing Task

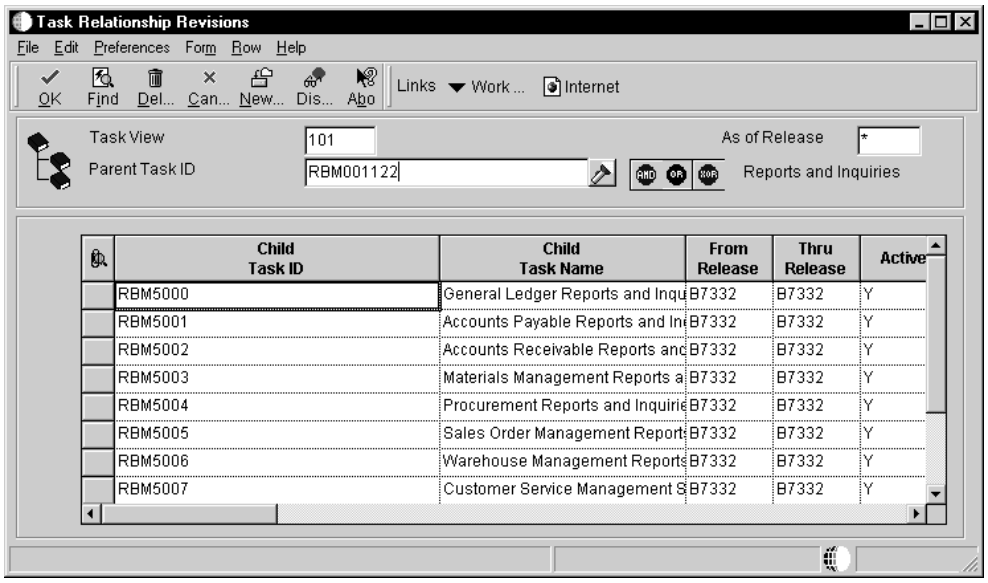
When you insert a task and thereby create a task relationship, the system stores the parent-child relationship that you create in the Task Relationships table (F9001). The system also stores the task view into which you inserted the task.

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

► To insert an existing task

1. In a task view of 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 choose 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 you selected.



3. Click a new line, and complete the following required fields:

   - Child Task ID

     Use the Search button to access the Task Search & Select form where you can find the task you want to insert.

   - Presentation Sequence

     If you want the task that you are inserting to appear in a position other than last in the presentation sequence, be sure to change the presentation sequence of the other tasks. For example, if the task you are inserting is in the eighth position, but you want it to appear second, you will have to change the presentation sequence of the task that is currently second to third, the third to fourth, and so on.

4. Complete any of the following fields:

   - Active

   - Required

     Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Working with Task Links* for more information.

   - Task View

   - Activator Type

     Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Linking Tasks To Create a Process* for more information.

- Override Resource
- Override Units
- Unit of Measure
- Auto Data Passing

  Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Linking Tasks To Create a Process* for more information.

- Override Form Mode

  Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Linking Tasks To Create a Process* for more information.

5. Click OK.

Setting Default Processing Options for a Task

You can set processing options, if they exist, for an interactive, AAI, constant, or batch application task. Even though you input the values, the user will still have an opportunity to change the values when he or she launches the task.

► To set processing options for a task

1. In a task view of Solution Explorer, select an interactive, AAI, constant, or batch application task.
2. Right-click the task, choose Prompt for, and then choose Values from the menu.

   The system launches the processing options form for the task. Note that if processing options for the application do not exist, the Prompt for Values option is disabled.

3. Enter processing options for the task, and then click OK.

Setting Versions for a Task

You can choose which version of an object a task will launch.

► To set versions for a task

1. In a task view of Solution Explorer, select an interactive, AAI, constant, or batch application task.
2. Right-click the task, choose Prompt for, and then choose Versions.

   The OneWorld Work With Versions form or Work With Batch Versions form appears.

3. Set up the interactive or batch version, and then click OK.

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 default role to the view. If the system administrator has applied other roles to that user, he or she can apply them to the task view to see a different set of tasks.

For example, a user might have two roles: General Accounting Clerk (the user's default 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 Auto-reconcile Void Payments, Auto-reconcile 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.

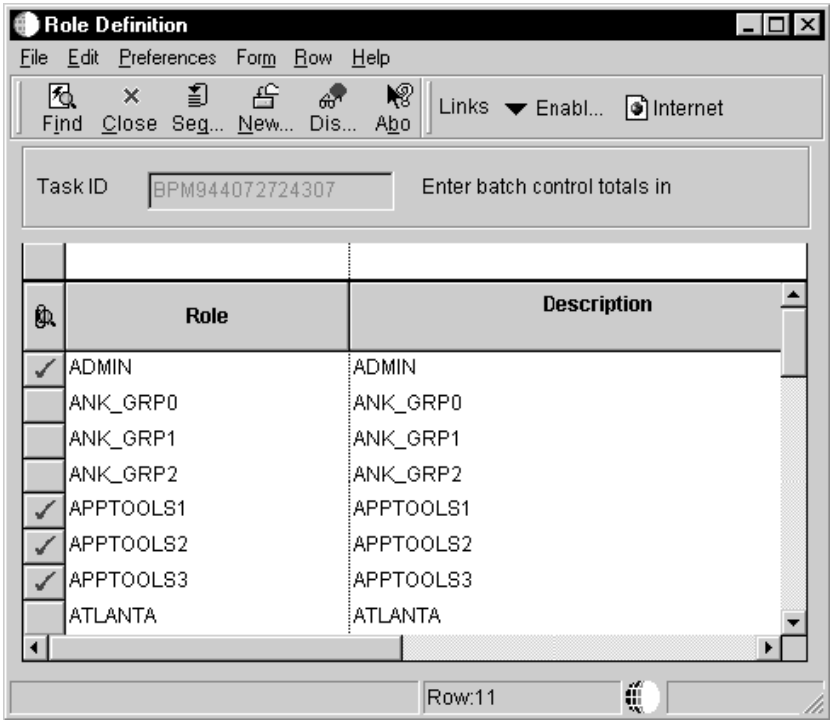
See Also

- *Creating a Task* for information about applying roles to a new task when you create it
- *Setting Up User Roles* in the *System Administration* guide for information on applying roles to users

► To apply roles to a task

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

   A checkmark appears to indicate that a role is applied to the task. To remove a checkmark, choose Change Status from the Row menu again. To apply all roles to the task, choose Enable All from the Form menu.



7. Click Close.
8. On Task Revisions, click OK.

Changing a Task

When you change a task using this process, you affect all instances of the task in the Solution Explorer. See *Setting Processing Options for a Task* and *Setting Versions for a Task* for information about affecting specific instances of tasks.

▶ To change a task

1. In a Solution Explorer task view, select the task that you want to change.
2. Right-click the task, and then choose Task Revisions from the pop-up menu.
3. On Task Revisions, complete any changes that you want to make to the task, and then click OK.

   See *Creating a Task* for more information about the available grid options.

Deleting a Task

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 relationship. To delete a task from the system, you must go into the Work With Tasks form, locate the Task, and then delete it from the Task Master table.

Deleting an Instance of a Task

You can delete a task from a relationship in a task view of Solution Explorer. Doing so deletes the task only from the task view; it still exists in the Task Master table and in any other relationship where it has been inserted. Furthermore, it can still be inserted into other task menus.

► To delete an instance of a task

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

Deleting a Task from the Task Master Table

If you want 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 task's relationships. This is equivalent to deleting the task in each task view menu where it appears. The process below describes deleting the relationships as well as deleting the task itself.

► To delete a task from the Task Master table

1. In Solution Explorer, choose Work With Tasks from the Tools menu.
2. Click Find.

   Use the QBE row to refine your search.

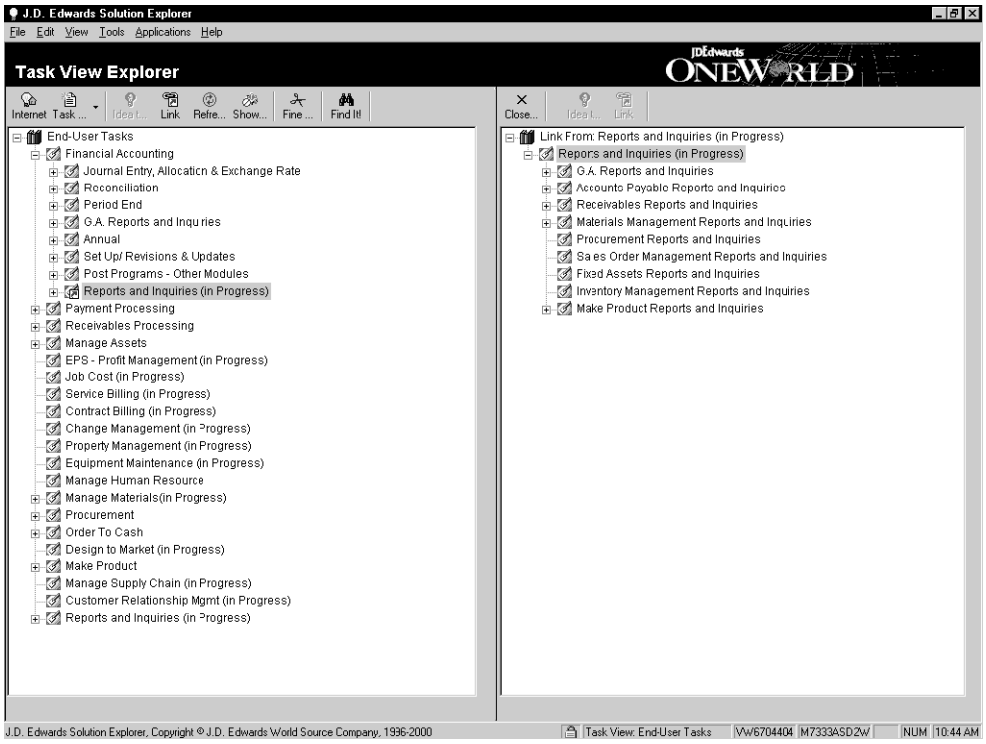
3. Select the task you want to delete, and then choose Where Used from the Row menu.
4. On Task where Used, search for the parent of the current task by clicking Find.

   The task might have more than one parent. If so, all of the parents appear.

5. Choose the parent of the task you want to delete, and then click Select.
6. On Task Relationship Revisions, select the task you want to delete, and then click Delete.
7. On Confirm Delete, click OK.
8. Click OK.
9. Repeat steps 5-8 for each parent of the task in the list.
10. When finished, on Task where Used, click Close.
11. On Work With Tasks, select the task you want to delete, and then click Delete.
12. On Confirm Delete, click OK.

Working with Task Links

A task link is a shortcut to another task. The linked task appears in an alternate window in the Solution Explorer, so you can still see your point of origin. Typically, links are made to tasks with children--nodes. When you link to a node, all of its children are visible in the new window.



You can link to any task in any task view except for the task view node itself. Optionally, you can link to a task view variant.

When you create links, you must identify the link's two members: the task that you are linking from and the task that you are linking to. The task you are linking from is called the link task. The link task displays the link indicator. The task you jump to, called the link target, appears in the second window.

You cannot link to a task view node.

Creating a Link to a Task

To create a task link, you revise the task relationships.

► To create a link to a task

1. In a task view of Solution Explorer, select the parent of the task that you want to make the link task.
2. Right-click the task you selected, and then choose Task Relationships.

   The Task Relationship Revisions form appears, listing the child tasks of the parent you selected.
3. From the list of tasks, click the task you want to set as the link task.
4. From the Row menu, choose Link To.
5. On the Link To form, click the Find Relationship button.

6. On the Find Relationship form, complete the following fields, and then click Find:

   - Task View

     Use the Visual Assist to bring up the Task View Search & Select form.

   - Parent Task ID

     Enter the parent of the task you want to set as the link target. Use the Visual Assist to bring up the Task Search & Select form.

   The Find Relationship form lists all of the child tasks of the parent you searched on.

7. Choose the task you want to set as the link target, and then click Select.

   The link target is the task that appears in the second window when the user invokes the link. The system uses the information you provided to complete the required fields in the Link To form.

8. Click OK.
9. On Task Relationship Revisions, click OK.

   The link task appears in the task view with a red arrow to indicate that it links to another task.

Creating a Link to a Variant Task View Menu

Creating a link to a variant is useful when you link task views as part of completing a business process. You might decide that users who link from one task view to another might need variants of a task relationship.

Before You Begin

- ❑ Apply the variant to the task link child.

► To create a link to a variant task view menu

1. In a task view of Solution Explorer, select the parent of the task that you want to make the link task
2. Right-click the task you selected, and then choose Task Relationships.

   The Task Relationship Revisions form appears, listing the child tasks of the parent you selected.

3. From the list of tasks, click the task you want to set as the link task.
4. From the Row menu, choose Link To.
5. On the Link To form, click the Find Relationship button.
6. On the Find Relationship form, complete the following fields, and then click Find:

   - Task View

     Use the Search button to bring up the Task View Search & Select form.

   - Parent Task ID

Enter the parent of the task you want to set as the link target. Use the Search button to bring up the Task Search & Select form.

The Find Relationship form lists all of the child tasks of the parent you searched on.

7. Choose the task you want to set as the link target, and then click Select.

   This is the base of the variant task view that appears in the second window when the user invokes the link. The system uses the information you provided to complete the required fields in the Link To form.

8. In the Link to Variant field, enter the Variant ID.

   This is the variant task view that users see in the second window when they activate the link. Use the Visual Assist in the Link to Variant control to locate the variant to which you want to link.

9. Click OK.
10. On Task Relationship Revisions, click OK.

    The link task appears in the task view with a red arrow to indicate that it links to another task.

Deleting a Link

To delete links, you revise the task relationships.

► To delete a link

1. In a task view of Solution Explorer, select the task link parent with the link you want to remove.
2. Right-click the task you selected, and then choose Task Relationships from the menu.
3. On Task Relationship Revisions, choose the task with the link you want to delete, and then choose Remove Link To from the Row menu.
4. Click OK.

   The system removes the link.

Documenting Tasks

Task documentation allows new system users to acquaint themselves with the purpose of a task, the steps required to complete it, and points to be aware of before beginning a task. Task documentation enables other users to create notes that clarify a business process and to provide links to other documents that result from completing a task, such as an invoice.

Many J. D. Edwards tasks already have documentation when you install the Solution Explorer. However, you can edit documentation using the Solution Explorer toolbar and an HTML editing tool, such as Microsoft Word. In addition, you can use your editing tool to write your own documentation.

Warning

Any modifications you make to J. D. Edwards-provided documentation will be lost when you update your system. Documentation you create yourself, however, will remain intact.

The Solution Explorer task view includes a documentation window, which displays task documentation in HTML format. When you categorize a piece of documentation for the Solution Explorer, you define it as being one of several instruction types, including Summary, Detail, Before You Begin, Notes, Deliverables, or Custom. These instruction types correspond to the names of the tabs that appear in the documentation window. For example, you might create two documents, defining one to be Summary and the other to be Detail. Consequently, users viewing documentation for that task would see two tabs in their documentation window: Summary and Detail. The documentation window is available both in the Solution Explorer and within the Universal Director.

Understanding Task Documentation Order of Precedence

To determine what to display in the task documentation window, the Solution Explorer performs the following steps. For each task, the system performs these steps for every documentation category in the system.

5. The system checks to see if documentation has been associated with the current task. If such documentation exists, the system displays that documentation. If not, the system proceeds with the second check.
6. If no documentation is available on the task level, the system checks to see if documentation has been associated with the task view. Task view documentation is actually associated with the task view node (the first task at the top of the task view). If such documentation exists, the system displays that documentation. If not, the system proceeds with the third check.
7. If no documentation is available on either the task or the task view levels, the system checks for global documentation that resides in the root of the documentation directory. If the file exists, then the system displays the file's contents in the documentation window. If the file does not exist, the system does not display a tab for that category.
8. You can create and edit global documentation, but you must do so outside of the Solution Explorer. Note that each category uses a different file for global text. For example, if you wanted global documentation for both the Detail and Consequence categories, you would create two files: detail.htm and consequence.htm.

The documentation associated with parent tasks is not checked as part of this order of precedence. For example, in a task view, you might have a parent task containing a child task. Even if the parent task has documentation associated with it, if the child task does not have documentation, the system displays the documentation associated with the task view and not the documentation associated with its parent.

Creating Documentation

You can write documentation of different types for any task in the Solution Explorer task view. Documentation might provide general information about a task, specific steps that you follow to complete a task, discussion of steps to take before you begin a task, or information that you customize for a particular task.

The documentation appears in the Solution Explorer documentation window each time you select a task in a task view, provided you have chosen Show from the View menu and clicked

Task Documentation. Tabs in the documentation window represent documentation instruction types that exist for a task. If you have not written documentation for the task, you can display a web site or HTML message for each task that does not have documentation.

To create the documentation, you click the arrow on the Edit button in the documentation window toolbar and choose the type of documentation you want to provide.

Before You Begin

- In the Solution Explorer, from the View menu, select Show and then select Task Documentation. This option displays the task documentation window.

► To create documentation for tasks

1. In a task view of Solution Explorer, select a task or task view.

   The documentation appears in the documentation window.

2. In the documentation window, click the arrow on the Edit button in the documentation pane.
3. Choose an instruction type from the drop-down menu.

   The Solution Explorer Documentation form appears.

   The Solution Explorer Documentation form contains the file name, which refers to the instruction type you chose and the full path to the documentation file you are writing.

4. Click Yes to continue.

   The system launches the editing tool that you use in your system, such as Microsoft Word.

5. Using the editing tool, write the documentation.
6. Save and close the document when you are finished.

   The system creates a tab that represents the documentation instruction type that you created. You might need to click Refresh to see the new documentation.

Revising Documentation

The system also allows you to revise documentation that you have already written. To revise documentation, click the Edit button in the documentation window, open the document, make changes, and save it.

Before You Begin

- In the Solution Explorer, from the View menu, select Show and then select Task Documentation. This option displays the task documentation window.

► To revise documentation

1. In a task view of Solution Explorer, select a task containing documentation you want to revise.

   The documentation appears in the documentation window.

2. Click the tab that represents a type of previously created documentation, such as Summary.

3. Click Edit.

   The system launches the editing tool that you used to create the documentation, and retrieves the HTML file you created.

4. Edit the existing document.

   If your HTML editor is Microsoft Word, the document might appear blank initially. In the Microsoft Word toolbar, click View, then choose HTML Source. You can now edit the HTML document.

   Note

   If the documentation's Special Handling parameter is blank, you cannot edit the file. When you click the pencil button, the Solution Explorer Documentation form informs you that the file cannot be edited. See *Adding an Instruction Type* for more information.

5. Save and close the document when you are finished.

   You might need to click Refresh to see the new documentation.

Adding a Documentation Category

Instruction types refer to the category of documentation for tasks in your system. For example, Summary is an instruction type that provides a high-level overview and definition of the task. The system allows you to create an instruction type for your system by adding a type to the UDC table that stores instruction types and information about them. Each documentation type is identified by its own tab in the documentation window.

When you add an instruction type, you can specify whether you want to allow the documentation files to be edited. If you want to control access to documentation, make sure that you apply a special handling parameter that prevents users from editing the documents.

► To add a documentation category

1. In System Administration Tools (GH9011), launch User Defined Codes (P0004A).
2. On Work With User Defined Codes, enter H90 in the Product Code field.
3. In the User Defined Codes field, enter IN for Instruction Types.
4. Click Find, and then click Add.
5. In the User Defined Codes form, enter data in the following fields and click OK:
   - Codes: The order in which the tabs in the documentation window will appear
   - Description 1: The instruction type, which is the tab title that will appear in the documentation window
   - Description 2: The file name, which is the name of the instruction type with an HTML extension
   - Special Handling: The display properties of the documentation. An E means that the file will be displayed and is editable. If you leave the column blank, the file displays, but it cannot be edited. An N means that the file will not be displayed.
6. Close the Work With User Defined Codes form.

Activators

To make the process of working through a series of tasks easier and less time consuming for end users, Solution Explorer provides a way to group tasks together. This group of tasks is called an activator. The system displays these tasks to the user with a tool called the Universal Director. With the Universal Director, users can work through tasks sequentially by clicking the Next button after they complete each task.

For example, you can create an activator containing the steps necessary to close out a quarter.

Understanding Activators

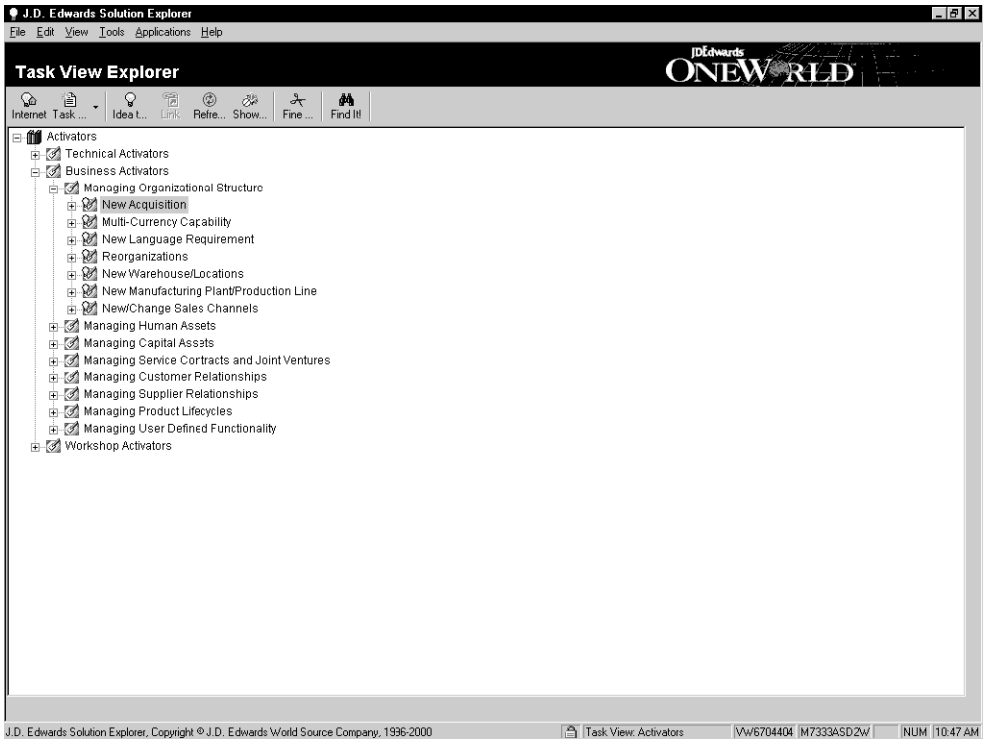
An activator is a sequential series of tasks that are required to perform a process that is integral to the functioning of your business.

The task that can launch an activator is always a parent task and is designated by an activator flag. Typically, the launching task is a non-software task under which the rest of the activator tasks reside. After you have created the activator, users executing the activator launch the Universal Director, a feature that provides a self-contained area in which you work with all the tasks in the relationship. While you are using the Universal Director to run activator tasks and task relationships, the system uses data mapping to pass data between tasks in the task relationship. The Universal Director guides you through each step of the process until you reach completion.

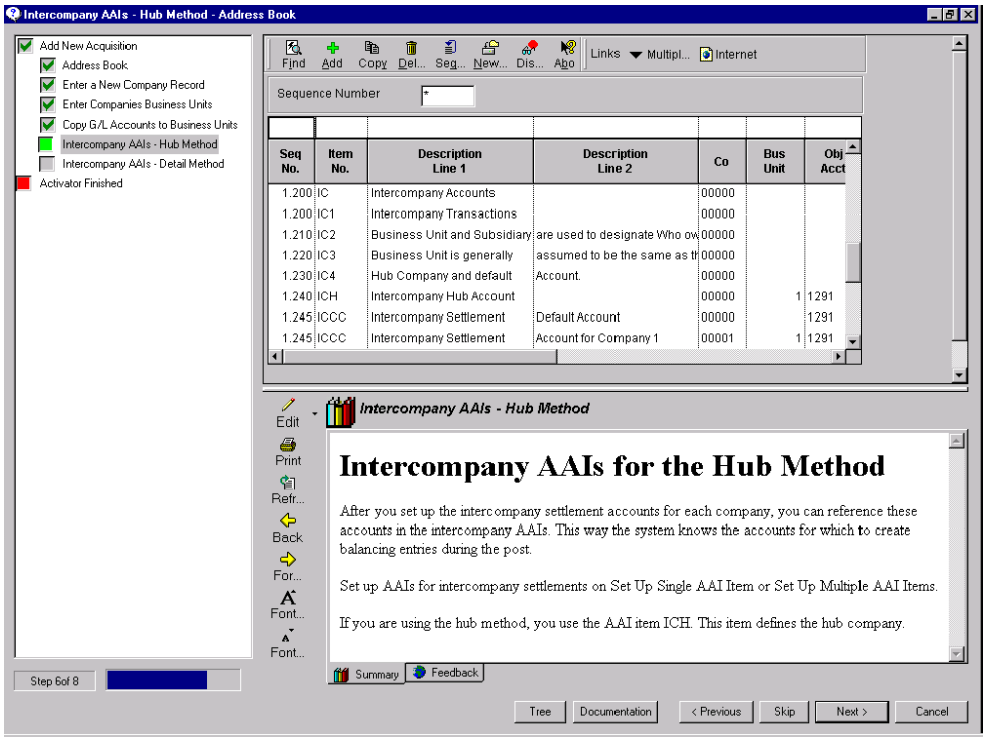
If you want to make changes to the activator, you make them in the Solution Explorer task view. Any changes that you make to the task relationship are automatically reflected when the Universal Director runs.

Activator Flags

An activator flag designates a task as a parent task under which the rest of the activator tasks reside. To enable an activator flag, you enter an activator type in the Task Revisions form. With the activator flag turned on, the task name displays a lightbulb symbol in the task view.



Double-clicking an activator or clicking the Idea to Action button in the Solution Explorer toolbar launches the Universal Director. The Universal Director presents each of the tasks in the process in sequential fashion. Within the Universal Director, users work with any interactive and batch applications necessary to complete the business process keyed by the activator.



Any sequence of tasks constitutes a task relationship in a broad sense. The tasks that you tie together might be tightly related. However, when you designate a parent task as an activator and launch the Universal Director, the system formally presents the tasks together in one unifying view. In addition, the system passes data between forms without hard-coded form interconnections. To alter a business process keyed by an activator, you change the task relationship in the Solution Explorer task view.

In addition, you can designate the type of activators you want to set up. Activator types include business and technical activators. Although the activator type does not affect how the activator works, by defining an activator as one type or another, you can more easily search for an activator.

You use business activators to implement rapid change to your system without having to consume development resources. You designate a task as a business activator if it is a part of the essential processes of your system. For example, a task such as New Company Acquisition would be a business activator. It triggers a process that ties together a sequence of related tasks, each of which you complete in a specified order to accomplish the goal. Other business activators might include adding a warehouse or creating customized reports and invoices.

You designate a task as a technical activator if it is part of the management and maintenance of your system infrastructure. Technical activators offer simplified system management in such areas as permissions, server administration, and component interfaces. For example, these activators allow information technologists to implement and maintain a package installation process. Technical activators, which automate processes such as these, free technical professionals to work on ensuring that the system performs to its maximum capability.

Universal Director

Activators enable you to create task relationships and pass data between forms without writing code that is embedded in Event Rules or in Workflow. The Universal Director creates a compact area in which users view and work with the tasks in your work process. The Universal Director presents the activator and all the tasks related to it in the sequence that you created in Solution Explorer.

The Universal Director allows you to move forward and backward within the task sequence, and it clearly displays your position within that sequence. You accomplish this movement within the view by using the director bar.

The Documentation view is also visible to you when you are working with the Universal Director. The system displays the documentation that corresponds to the particular task you are working on in the Universal Director view. You can manipulate and edit the documentation while you work in the Universal Director, just as you can from Solution Explorer.

In short, the Universal Director presents another view of the activator parent-child task relationships that exist in the Solution Explorer task view. However, it also provides the interface for you to execute the tasks in those relationships.

Data Mapping

The Universal Director provides data mapping, which passes data between forms as you work on the tasks in the sequence. This data mapping mechanism ensures that you can pass data between forms logically without hard-coding form interconnections.

During data mapping, the Universal Director validates that a value-containing header control or grid column in one form has a header control or grid column match in the next form. If the match exists, the Universal Director passes the value. If no match exists, data mapping fails and the Universal Director generates an error message. You activate data mapping by entering Y in the Auto Data Passing grid column in the Task Relationships Revision form for each task that is to pass data to another task within the task relationship.

Creating an Activator

To create an activator, you first need to create and designate a parent task as the launch task, and then you turn on the activator flag for that task. A launch task serves as the parent task of a relationship that constitutes a key business or technical activator. Typically, launch tasks are non-software tasks. You create them in the same way you create any other kind of task. A task that you have designated as an activator appears in the task view with a lightbulb symbol.

Once you have created the launch task, you can place as many child tasks under it as you require to complete the process. Then, when you select the launch task and click the Idea to Action button, the system launches the Universal Director. From the Universal Director, you can step through the entire sequence from beginning to end, working in any applications that are necessary to reach completion.

► To create an activator

1. In a Solution Explorer task view, create or select a non-software task.

   If you select a task, right-click the task, and then select Task Revisions.

2. On the Task Revisions form, complete the fields and options on the Common, Executable, and Resources tabs as required, making sure to enter either a 1 or a 2 in the Activator Type field, and then click OK.

   The system places a lightbulb symbol on the task icon to designate the task as being a launch point for an activator.

3. To finish creating the activator, insert as many tasks required to complete the transaction in the proper order.

   You can place tasks in the activator by creating them or by sending them to the task view from another task view and then dragging and dropping them in their proper locations.

See Also

- *Creating a Task*

Example: Creating an Activator

This example creates an activator for adding new users to the system. After completing the process, you can launch its activator and the Universal Director will automate the process of completing the steps.

► To create an activator

1. Determine the steps required to complete the process.

   Generally, you will need to decide what applications a user will need to run and in what order they have to be run.

   In the add user example, the following list identifies the steps to be completed and the application used to complete each step. Later, each step will be the basis for its own task in the process. Notice that the task name is not the same as the application name. Although you could use the application name as the task name, describing the action to be performed rather than listing the application to use makes the process clearer to the user. In this example, all of the applications are J.D. Edwards software applications.

   Observe that some applications have more than one step applied to them.

Add user profile	User Profile Revisions (P0092)
Add user profile environments	User Profile Revisions (P0092)
Add user profile security	OneWorld Security (P980WSEC)
Add user row security	Security Workbench (P00950)
Add user action security	Security Workbench (P00950)
Add user machine	Deployment Locations Application (P9654A)

2. Create the parent task.

   This task will serve as the launch task later in the example. The parent task should be a placeholder--a non-software task. When you create the task, complete the Task Revisions form as follows. If a field is not mentioned, then leave it blank.

   - Task ID: H95_ADD NEW USER
   - Task Name: Add New User
   - Common tab fields
     - Product Code: H95
     - Activator Type: 1
     - Active: (selected)
   - Executable tab fields: select the Non-Software option

   Putting a value in the Activator Type field is critical; if you do not, the system will not mark the task as a launch task and the user will not be able to access the Universal Director to automate the child tasks.

3. Add a task called Add User Profile as the first child of the Add New User task. When you create the task, complete the Task Revisions form as follows. If a field is not mentioned, then leave it blank.
   - Task ID: H95_ADD USER PROFILE
   - Task Name: Add User Profile
   - Common tab fields
     - Product Code: H95
     - Active: (selected)
   - Executable tab fields: select the Interactive option
     - Application: P0092
     - Version: ZJDE0001
     - Form: W0092A
     - Option Code : 1
4. Add the remaining tasks, in order, as children of Add New User following the Add User Profile task.

   In this example, you are creating all of the tasks for the process. However, you can insert already existing tasks into the process as well. You can also send tasks to the task view and then drag and drop them in the correct place.

   Set up each task similarly to how you were instructed to name the last two tasks. Use the following parameters on the Executable tab of the Task Revisions form:

   - Add User Profile Environments
     - Application: P0092
     - Version: ZJDE0001
     - Form: W0092C
     - Option Code : 1

- Add User Profile Security
  - Application: P98OWSEC
  - Version: ZJDE0001
  - Form: W98OWSEC
  - Option Code: 1
- Add User Row Security
  - Application: P00950
  - Version: ZJDE0001
  - Form: W00950F
  - Option Code: 1
- Add User Action Security
  - Application: P00950
  - Version: ZJDE0001
  - Form: W00950M
  - Option Code: 1
- Add User Machine
  - Application: P9654A
  - Form: W9654AB

5. To test the process, click the Add New User activator, and then click the Idea to Action button on the Toolbar.

   The steps in the tree on the left of the Universal Director mirror the tasks you added to create the process.