PeopleSoft®

EnterpriseOne Object Management Workbench 8.9 PeopleBook

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Object Management Workbench

Object Management Workbench (OMW) is the primary component of the change management system for J.D. Edwards software development. A change management system is vital to a productive development environment because it helps organize a myriad of development activities and helps prevent problems, such as when a developer intermixes components from different releases or when multiple developers simultaneously change an object. OMW automates many of these change management activities.

OMW has the following three componentss:

Graphical User Interface (GUI)	Unifies all development in an intuitive interface
Configuration System	Controls all development from a central location
Logging System	Tracks all program changes automatically

OMW Projects

Projects are composed of objects and owners. All development of objects within J.D. Edwards software must be performed within the context of a project. Usually, you must first create or choose a project, add an object to it, and then you can work with that object. Typically, objects are included in a project because they have been modified or created by a developer to complete a specific task.

In addition to objects, users can be associated with different projects. In fact, before you can add an object to a project, you must have been added to the project as a user in a role that has permission to add objects. A user can be assigned to the same project more than once with different roles. Projects may also contain other projects.

Default Projects in OMW

The default project is your personal project that you use for development and research. It holds any miscellaneous development objects that you want to work with but that you have not associated with a specific project. J.D. Edwards software creates a default project when you run OMW for the first time. Your J.D. Edwards software logon is the name of your default project.

Use your default project to do the following:

- Research, develop, and prototype objects
- Review objects that you do not need to modify or check in

The default project is similar to other projects; however, the status of a default project does not change. Therefore, you cannot use a default project to transfer objects.

Some objects, such as versions, workflow data, and reports can be created and edited outside of OMW. Nevertheless, any changes that you make to these objects must be tracked and managed. You use your default project to manage these objects. If you create or access such objects outside of OMW, these objects are added to your default project.

User Roles in OMW

Users must be assigned to a project before they can revise the project or the objects within that project. When you add a user to a project, you also identify the role of the user within the project. The user role defines the function of the user within the project organization and specifies the user's access to certain OMW functions, depending on the allowed actions associated with the role. User roles and their allowed actions are defined in the Object Management Configuration application.

Note

Do not confuse user roles in the OMW with the concept of user roles as applied to other components of J.D. Edwards software, such as Solution Explorer. OMW roles function independently of all other role-based systems in J.D. Edwards software.

Allowed Actions

Allowed actions are rules that define the actions that may be performed by a user who is assigned a specific user role. You set up these rules for each user role, object type, and project status by using the Object Management Workbench Configuration program.

Tokens

Some objects use tokens to minimize the possibility of one user overwriting another user's changes to an object. The token management system organizes application development by providing a single checkout environment. Tokens provide a change control solution in a system that does not support merging or multiple versions of object specifications.

Projects hold tokens for an object, and each object has only one token. You can check out an object only if your project holds the token for the object. In this way, an object can reside in several projects, but can be checked out and checked in only by qualified users of the project that holds the token. However, you can allow other projects to share an object's token, thereby allowing the object to be checked out and checked in by qualified users of one or more projects. Only one person can check out an object at a time.

Note

Only Object Librarian objects have tokens. See *Object Librarian and Non-Object Librarian Objects* in the *Object Management Workbench Guide* or more information about Object Librarian objects.

You can perform the following actions while your project holds the token:

Action	Description
Allow Another Project to Inherit the Token	This action forces both projects to be advanced together as if they were one project and allows multiple fixes to be applied to an object.
Switch the Token to Another Project	The project that donates the token returns to the queue as the first project waiting for the token when the new project inherits the token. This action allows an emergency fix to be applied immediately. Token switching should be restricted to a specific user role to ensure security of the objects.
Release the Token	You can release the token and allow the next project in the queue to inherit the token. The token can be released manually or configured to be released when a project advances to a new status. The token can be released when the project's status first changes or as late as when the project is closed. You must configure token release according to object type. Some object types, such as business functions, can hold their tokens longer, while other object types can give up their tokens earlier. You must also, set up tokens for release at a predefined object transfer point.

Your organization's change control procedures determine how you configure the object-transfer activity rules to release tokens. If you do not define object-transfer activity rules to release tokens, developers risk overwriting the changes of other developers.

Object Management Workbench Interface

From left to right, the initial OMW form displays the following:

- The project window, which displays your projects and their related objects and users. To view your current projects, click Find.

  The following information describes how the color of an Object Librarian Object icon indicates its status:

  - Gray Object Icon with Check Mark: Another project holds the token for this object.
  - Colored Object Icon (not gray): The project that contains the object holds the token for this object.
  - Colored Object Icon with Check Mark (not gray): The project that contains the object holds the token for the object, and the object is checked out.
  - Gray Object Icon: This object is not checked out and no project currently holds the object for the token.

  Non-Object Librarian Object icons do not vary in appearance.

  Objects to be deleted are marked in bold in this window.

- The center column, which contains action buttons that you use to perform actions on a selected object. Available buttons vary based on your roles in the current project and on the status of the project in which the selected object resides. When you first launch OMW, no buttons appear in the center column because you have not selected an object.

- The information window, which displays a Web site; project status and release information; object or user information; and search results. Initially, the window displays a Web site or HTML page. The contents change based on your tab and object selections. For example, when you select a project or an object in the project window, the information window displays information about the selected project or object. To return this window to its initial state, click News on the toolbar.

Object Librarian and Non-Object Librarian Objects

OMW provides control of J.D. Edwards objects in a simple, integrated, graphical user interface for software development. In J.D. Edwards software, an object is a reusable entity based on software specifications that are created by J.D. Edwards tools.

In OMW, this definition is expanded to include non-Object Librarian objects that are data source-based rather than path code-based.

J.D. Edwards objects include the following Object Librarian objects:

- Batch applications and versions (UBE)
- Business functions (BSFN)
- Business views (BSVW)
- Data structures (DSTR)
- Interactive applications (APPL)
- Media objects (GT)
- Tables (TBLE)

J.D. Edwards objects include the following non-Object Librarian objects:

- Data dictionary items
- User defined code items
- Workflow objects
- Menus

Working with Object Management Workbench

After your system administrator has configured Object Management Workbench (OMW), including setting up security and roles, you can start working with OMW.

Default Projects

When you run OMWfor the first time, the system creates a default project and tags it with your user ID. The default project is your personal project that you can use for development and research.

You can use default projects to do the following:

- Develop objects that are later moved into a regular project.
- Store objects to be added to a project later.
- Automatically store objects worked on outside of OMW.

A default project is similar to a project except that the project status of a default project never changes. Therefore, you cannot use a default project to transfer objects.

Non-Object Librarian objects can be accessed outside of OMW. If you access objects such as versions, user defined codes, menus, or the RDA outside of OMW, these objects are added to the default project. Any changes that you make to these objects must be tracked and managed through the default project. Modifications to non-Object Librarian objects are always logged.

If you want to advance the status of an object, use OMW to move the object from the default project to a project.

Using Your Default Project

Although your default project appears immediately, you have one role only (usually Originator), as configured by your system administrator. You might need to add yourself to your default project in another role, such as Developer.

See Also

- *Adding Users to Projects* in the *Object Management Workbench Guide* for information about adding yourself in additional roles to a project

Understanding the Life Cycle of a Project

This topic discusses a typical project life cycle from inception to completion. It includes steps required by a SAR-based (software action request) system. If you are not using a SAR-based system, some of the following steps might not apply to you. Furthermore, depending on your business's software development procedures, the steps that you follow and their order might vary from the following process.

1. Based on the task to be accomplished, create a new project.
2. Add users to the project.

When you add a user, you define the role of the user, based on the actions that you want that user to be able to perform within this project. You might need to add a user more than once if you want the user to be able to perform actions allowed by different roles. As the project progresses, you can continue to add (or remove) users as required.

When you create a project with SAR integration turned off, you are automatically added to that project in the role determined by your system administrator (usually, as the Originator). You might want to add yourself to the project in other roles as well.

When you create a project with SAR integration turned on, the person who entered the SAR is added to the project in the role of Originator.

3. Add objects to the project.

   Qualified users might be adding objects to the project throughout much of its life cycle.

   If you create a new object, drag and drop the object from your default project to the project as appropriate.

4. Check objects out and in.

   To be able to save your changes to an object, you must check the object out, apply your changes, and check the object in.

   You can check out an object only if no other projects hold the token for that object. If the token is available, it passes to your project when you check the object out. If another project already holds the token for the object, you can join a token queue to be notified when the token becomes available.

   After checking out an object and modifying it, you can save your changes without checking the object in.

   When you check an object in, the system might not release the token from the project, depending on how OMW is configured. As long as your project holds the token, another qualified user in your project can check the object out, but users in other projects cannot. You can allow users in other projects to check an object out by removing the object from the project.

5. Advance the project.

   As the project progresses through its life cycle, you must change its status. You do this by advancing the project. When you advance a project, the allowed actions for some roles might change and some objects might be transferred to other locations. Status-based role changes and transfers are configured by your system administrator.

6. Complete the project.

   Based on your processes, you might archive or delete the project when finished. In OMW, 01 (Complete) is a closed status.

Working with Projects

In Object Management Workbench (OMW), all development is performed within the context of a project.

By default, when you click Find on OMW, the project window displays all of the projects to which you are added in at least one role. The project list can become lengthy, and you might want to filter the list so that only certain projects appear. For example, if you have a Developer role on some projects, you might want to filter your list so that you view only those projects with a development status. You can filter by user, role, and status.

In addition to projects in which you have a role, you can also view any other projects in the system. You can search for projects based on a variety of criteria, including object. If you complete the filter fields in the project window before you perform a search, you can refine the search based on the information that you enter in the filter fields.

Note

Searches are case-sensitive. When you complete fields, verify that you entered your search criteria using the commonly accepted spelling and case. If you receive no search results, try different capitalization or spelling.

► To filter projects

1. On Object Management Workbench, complete the following fields in the project window:
   - User

     This field is required. When you launch the OMW, this field displays your ID. You can also enter other user IDs in this field.
   - Role
   - Status

     The range that you enter is inclusive. To search for projects with a specific status, enter the status code in both fields.
2. Click Find.

► To perform a project search

1. On Object Management Workbench, choose Advanced Search from the Form menu.
2. If you entered a user ID on the previous form, the OMW Project Search and Select by Project User form appears, and you can limit the search by completing the following fields:
   - User Role
   - Project Status

     To search for projects with a specific status, enter the status code in both fields. The range that you enter in these fields is inclusive.

The OMW Project Search and Select form appears if you did not complete any of the filter fields in the project window. These fields are unavailable on the OMW Project Search and Select form.

3. Enter the desired criteria in the Query by Example (QBE) columns, and then click Find.
4. Choose one or more projects, and then click Select.

   The projects that you chose appear in the project window.

► To search for projects by object

This search method places all of the selected projects in the project window.

1. On Object Management Workbench, choose Search by Object from the Form menu.
2. On OMW Project Search and Select by Object, enter the desired criteria in the Query by Example (QBE) columns, and then click Find.
3. Choose one or more projects, and then click Select.

Creating New Projects

You create new projects to use as containers for objects and users that are grouped for a specific purpose. For example, you can create separate projects for different system enhancements. Through logging, projects also allow you to track the evolution of objects within the project, as well as the project itself.

► To create new projects

1. On Object Management Workbench, click Add.
2. On Add J.D. Edwards Object to the Project, click OMW Project, and then click OK.
3. On Adding a Project, choose how you want to create the project, and then click OK.

   The option to create a project using a SAR is valid when SAR integration is enabled. This form is unavailable if your system is does not use the J.D. Edwards SAR system.

4. On Project Revisions, click the Summary tab, and then complete the following fields:
   - Project ID

     J.D. Edwards recommends that you use the following format when you name your projects:

     YYYzzzzz

Where *YYY* = a company-specific code (JDE is reserved for J.D. Edwards projects)

zzzzz = a unique five-digit number

For example, ABC00001 might be the name of a project.

   - Description
   - Type

- Severity
- Product System Code
- Release

5. Click the Dates tab, and then complete the following field:
   - Planned Completion Date
6. Click the Category Codes tab, and then complete the following optional fields:
   - Category Code 1 through Category Code 10
7. Click the Attachments tab, and then add optional text comments to document the new project.
8. Click OK.

► To add users to projects

1. On Object Management Workbench, click the project to which you want to add the users.
2. Set up a list of users to add to the destination project by performing a search using the Search tab in the information window.
3. On the search form, select the user to be added to the destination project.
4. Verify that the owner's node in the destination project in the project window is highlighted. If it is not highlighted, click it.
5. With the user to be added highlighted, click the Add Object or User to Project button in the center column.
6. On Add User to Project, complete the following fields, and then click OK:
   - Role
   - Lead

   Note
   To add a user in more than one user role, repeat the add user procedure and choose a second user role for the same user. Different functions are enabled for different user roles, according to their allowed (user) actions. These actions are configured by the administrator for your project using the configuration program of the OMW.

► To remove users from projects

Removing a user from a project does not delete the user from the system.

1. On Object Management Workbench, choose a user in the project window.
2. Click the Remove Object or User from Project button in the center column.

Changing Project Properties

You can view and modify the following properties of any project that you select:

- Description
- Type
- Severity
- Product system code
- Release information
- Start date
- Planned completion date
- Category codes
- Text attachments

► To change project properties

1. On Object Management Workbench, click a project, and then click Select.

   You can also click the Design button in the center column.

2. On Project Revisions, click the Summary tab, and then revise the information in the following fields:
   - Description
   - Type
   - Severity
   - Product System Code
   - Release
3. Click the Dates tab, and then revise the information in the following fields:
   - Date Started
   - Planned Completion Date
4. Click the Category Codes tab, and then revise the information in the following optional fields:
   - Category Code 1 through Category Code 10
5. Click the Attachments tab, and then add optional text comments to document the project.
6. Click OK.

Advancing Projects

After development is complete for all objects in a project, the status of the project must be advanced to send the project through the development cycle. Changing the status of a project might affect the allowed actions of certain roles.

OMW can be configured to allow users, based on their roles, to perform specific actions when a project is at a specific status. For example, a user who is assigned to a project in the role of developer might be able to perform the following actions before the project is advanced: check out, design, and check in. However, after the project is advanced to the next status, a developer might not be able to perform any actions at all.

Changing the status of a project can also initiate actions, such as transferring objects in the project and deleting from the system objects that have been marked for removal. You cannot advance a default project.

Before You Begin

- ❑ Ensure that all of the objects in a project are checked in, including objects in projects that will inherit a token.
- ❑ In SAR-based systems, ensure that you complete all required SAR fields.

► To advance projects

1. On Object Management Workbench, click the project to be advanced.
2. Click the Advance Project button in the center column.
3. Click the field labeled >>>, and then enter the desired project status.

   Your choices are limited, based on the current status of the project and on your company's specific procedures, which are defined in the Object Management Workbench Configuration application.

   > **Note**
   > Turn on the Validate Only option to validate the status change without actually advancing the status of the project. This option allows you to verify that the project is valid before attempting any object transfers. Any projects that are linked to it through token inheritance are validated at this time as well.

4. Check for dependencies, if applicable.

   When you advance a project, you can use the Check Dependency feature to determine whether the project contains objects that can be rolled up when an ESU is created. If the system finds a rule violation, the project is not transferred.

5. Click OK.

   If you did not turn on the Validate Only option, the system advances the project status and initiates any required object transfers and deletions. Otherwise, the system validates only the project status.

   Use the OMW logging system to view any errors that occurred during the status change. If you cannot advance the project, verify the following:

   - All of the objects in the project are checked in, including objects in projects that will inherit a token.
   - If you are using a SAR system, that you have completed all of the required fields in the SAR.

Adding Existing Projects to a Project

In addition to objects and users, projects can contain other projects. You can add a project to a project or, if the target project and the project to be added both appear in your project window, you can move the project to be added under the target project using drag-and-drop.

The methods for adding and moving projects are identical to the methods for adding and moving objects.

See Also

- *Adding Objects to Projects* in the *Object Management Workbench Guide*
- *Moving Objects* in the *Object Management Workbench Guide*

Deleting Projects

When you delete a project, the system removes all objects and owners from the project. The project is then completely deleted from the system.

If you delete a project that contains objects that are checked out, the system erases the check-out for each object before deleting the project. If the project holds any tokens, the system releases them as well.

► To delete projects

1. On Object Management Workbench, click a project, and then click Delete.

   The system confirms the deletion.

2. Click OK in the Confirm Delete query.

Working with Objects

OMW allows you to administer database objects in a tool that displays nodes, tables, business views, indexes, and programs hierarchically. Rather than have an administrator manage all of the objects and track what modifications went with which SAR/Project, you do it yourself. You can create and manage a variety of objects with OMW, including:

- Applications
- Business functions
- Data structures
- Tables
- Business views
- Data and menu items
- User defined codes (UDCs)
- Workflow processes

► **To create objects**

1. From the Object Management Workbench, click Add.
2. On Add J.D. Edwards Object to the Project, click the object type that you want to create, and then click OK.

   The Add Object form appears. The contents of this form vary based on the type of object that you are creating.

3. On Add Object, complete the fields as appropriate for the type of object you are creating, and then click OK.

   Depending on the object that you are creating, a design form, which provides the functions you need to design the object, might appear. For example, if you create an interactive application, the Interactive Application Design form appears. Click the Design Tools tab to access the buttons that launch Form Design Aid, Work with Vocabulary Overrides, Work with Interactive Versions, and so on.

Searching for Objects

Conducting an efficient search is preliminary to adding objects to a project. You can search for objects by category and type, or you can perform an advanced search and find objects based on other criteria.

Note

Searches are case-sensitive. When you enter your search criteria, enter the commonly accepted spelling in standard capitals and lower case. If you receive no search results, try different capitalization or spelling.

► To search for objects

1. On Object Management Workbench, click the Search tab.
2. Complete the following fields, and then click the button next to the Search field:
   - Category

     You can search a variety of categories. For example, to find a report, choose Object Librarian as the category because reports are Object Librarian objects. To find a project, choose OMW Project. To find a user, choose Owners.
   - Search Type

     Valid choices for this field vary based on the category that you choose.

     If you set the search type to Object Name|Version Name, you can use the | delimiter to specify a search suffix. For example, if the category is Object Librarian and the search type is object name, entering R0008P|XJDE* displays all XJDE versions of object R0008P (Date Patterns Report).
   - Search

     Entries in this field must match the Search Type that you choose.
3. To search for objects based on criteria other than category, search type, and name, click Advanced Search.
4. On Object Librarian Search and Select, enter the desired criteria in the Query by Example columns, and then click Find.
5. Choose one or more objects, and then click Choose.

   The objects that you chose appear in the information window.

See Also

- *Adding Objects to Projects* in the *Object Management Workbench Guide* for information about moving objects to the project window

Adding Objects to Projects

An object must exist within one of your projects before you can work with it. You can add an existing object to a project, or you can create a new object for a project. When you create a new object, the system places it in the current object that you have selected. If you did not select a project before creating the object, the system places it in your default project. Adding an object to a project neither checks out the object nor downloads the specifications of the object to your local environment.

Note

If you try to add an object to a project that already exists in that same project, the Release Search & Select form appears because the system allows you to modify the same object across multiple releases.

See Also

- *Moving Objects* in the *Object Management Workbench Guide* for instructions for moving an object from one project in your project window to another project in your project window
- *Checking Objects In and Out* in the *Object Management Workbench Guide* for instructions for checking objects out so that you can modify them
- *Getting Object Specifications* in the *Object Management Workbench Guide* for instructions for downloading the specifications of an object to your workstation without checking out the object

► To add an object

1. On Object Management Workbench, click the project to which the object will be added.
2. Find the object to add to the destination project by performing a search using the Search tab in the information window.
3. When the search completes, on the search form, choose the object to be added to the destination project.
4. Verify that the destination project is highlighted in the project window. If it is not highlighted, click it.
5. With the object to be added highlighted, click the Add Object or User to Project button in the center column.

► To add multiple objects

1. On Object Management Workbench, click the project to which the objects will be added.
2. Find the objects to add to the destination project by performing a search using the Search tab in the information window.
3. Verify that the destination project is highlighted in the project window. If it is not highlighted, click it.
4. From the Row menu, choose Advanced, and then choose Add All Objects.

   The system adds all of the objects that fit the search criteria to the project that you selected in step 1.

Moving Objects

You can move objects from one project to another by dragging and dropping them. Both projects and the object must be visible in your project window. This task can be used to move users from one project to another. You can also use this task to move a project to another project.

► To move an object

1. On Object Management Workbench, in the project window, click and hold the mouse button on the object that you want to move.
2. Drag the object over the target project and release the mouse button.

The system removes the object from the source project and adds it to the target project.

► To move multiple objects

1. On Object Management Workbench, in the project window, click the project that contains the objects that you want to move.
2. From the Row menu, choose Advanced, and then choose Move Objects.
3. On Move Multiple Objects Search & Select, in the To Project field, enter the project to which you want to move the selected objects.
4. In the detail area, click the objects that you want to move.
5. Click Select.

   The system moves the objects from the source project to the target project. This process might take several minutes, depending on the number of objects that you selected.

Removing Objects from Projects

This action removes the reference to the object from the project; it does not delete the object. This task also can be used to remove users from a project.

► To remove objects from projects

1. On Object Management Workbench, choose an object in the project window.
2. Click the Remove Object or User from Project button in the center column.

Deleting Objects

You can delete any object from the server that is at an open status. You can also mark an object for deletion from its transfer locations upon project advancement or from its current save location (the location where the system saves the object when you click the Save button in the center column of OMW).

You can also use this task to remove the specifications for Object Librarian object from your workstation.

When you choose Delete Object from Server for a non-Object Librarian object, the system deletes the object from locations that are defined in the transfer activity rules when you click OK. If you choose Mark Object to be Deleted from Transfer Locations, the system deletes the object from any other configured locations when the project advances.

For an Object Librarian object, you can delete the local and save specifications. If the Object Librarian object is checked in, you can delete the checked-in version of this object by choosing Delete Object from Server. If you choose Mark Object to be Deleted from Transfer Locations, the Object Librarian object is deleted from its transfer locations, which are defined in the transfer activity rules when the Project Status is advanced.

► To delete objects

1. On Object Management Workbench, choose an object in the project window.

2. Click Delete.

   A Delete form appears. Your available options vary depending on the object type and whether the object has been checked in.

3. Choose one or more of the following options, and then click OK:

   - Delete Object from Server

     Click View Locations for a list of locations from which the object is deleted when you choose this option. This action occurs as soon as you click OK.

   - Delete Object Locally

     This action occurs as soon as you click OK.

   - Delete Object from the SAVE location

     This action occurs as soon as you click OK.

   - Mark Object To Be Deleted From Transfer Locations

     Objects marked for deletion from transfer locations appear in bold letters in the project window. They are deleted from the transfer locations when the project status is advanced.

   - Remove Object from ALL locations

     This option selects all of the above options.

Getting Object Specifications

To download checked-in object specifications from the server that is defined for the current status, choose the object and click the Get button in the center column. Use this function when someone else has been working on the object and you want to see the changes, or when you have made changes to the object but want to abandon them in favor of another version of the object.

The Get button allows you to get the specifications for objects that reside in your path code only. However, you can download the specifications of an object that resides in other areas of the system. For example, you might want to get the specifications for an object as it existed in a previous software release. Use the advanced get feature to specify the location of the object that you want to download.

Note

If you want to review the object and not save any changes, use the Get button to copy the latest specifications to your local workstation instead of checking out the object and then erasing the checkout.

► **To use advanced get**

1. On Object Management Workbench, choose an object in the project window.
2. From the Row menu, choose Advanced, and then choose Advanced Get.

You are prompted to decide whether you want to overwrite local specifications.

3. Click one of the following options:
   - Yes

     If you choose Yes, go to step 5.
   - No

     If you choose No, continue with step 4.
4. On Path Code Search & Select, complete the following field, and then click Find.
   - Path Code
5. Choose the location of the object that you want to get, and then click Select.

Checking Objects In and Out

You can check out an Object Librarian object that resides in your projects provided that the token for the object is either available or held by the project in which the object currently resides. Only one user at a time can check out an object. Checkout fails if the object is already checked out or if the token is unavailable. If the token is unavailable, you can join the token queue for the desired object. If you join the token queue, you will be notified when the token is available and your project will receive the token.

Check in an object when you want to upload its specifications to the server and make it publicly available. When you check in an object, the system records the project in which the object resides and ensures that only changes made under the current project are transferred when the project is advanced to a status that triggers a transfer. If you move an object from one project to another using the drag-and-drop method, the system tracks the change and records the new project for the object. However, consider the following scenario:

7. You add an object to a project and check it out.
8. You change the object and check it in.
9. You use the right-facing arrow in the center column to remove the object from the project.
10. You later add the object to a different project.

In this scenario, the system cannot track the object because it passes out of a project completely. Therefore, when you advance the second project, if the system needs to transfer the object as part of the advance, the transfer will fail because the object's last known check-in project location and its current project location do not match.

When you drag-and-drop an object, the system updates its tables in such a way that the transfer can occur. This is not the case when you remove an object from a project and then add it to a different project later.

If an object is checked out, you can erase the checkout. When you erase a checkout, local changes are not uploaded to the server. Erasing the checkout for an object does not release its token, but it does allow other developers who are assigned to the same project to check out the object.

See Also

- *Working with Tokens* in the *Object Management Workbench Guide*

► To check objects out

1. On Object Management Workbench, choose an object in the project window.
2. Click the Checkout button in the center column.

   OMW indicates that an object is checked out by superimposing a check mark over the object's icon. Additionally, data about the object that appears in the information window is updated to reflect its checked out status.

   Note
   If the object is unavailable, the system asks if you want to be added to the token queue for the object. If you choose to join the queue, the system alerts you when the token is released and assigns the token to your project. To determine which project holds the token for an object, choose the object in the project window and click the News/Status tab in the information window. Additionally, if you have joined a token queue, your position in the queue appears here.

► To check objects in

1. On Object Management Workbench, choose a checked-out object in the project window.
2. Click the Check-in button in the center column.

   OMW indicates that an object is checked in by removing the check mark that was superimposed over the object's icon when it was checked out.

► To erase checkouts

1. On Object Management Workbench, choose a checked-out object in the project window.
2. Click the Erase Checkout button in the center column.

   OMW indicates that an object is no longer checked out by removing the check mark that was superimposed over the object's icon when it was checked out.

Changing Objects

When you create an object using Object Management Workbench (OMW), OMW allows you to define the properties of the object. OMW also provides access to design tools and system actions for the object. Similarly, after the object is created, you can use OMW to modify the object and its specifications.

Your system administrator can also specify a separate save location that is different from your local environment and from the location of the object on the server. Save objects to this location by selecting the object and clicking the Save button in the center column. Retrieve an object from its save location by selecting the object and clicking the Restore button in the center column. Note that the save location for the object must be different from its system location.

You must check out the object before you modify it to be able to check the object back in and upload the changes.

As users modify objects, the changes exist only in their local environments until they either save the object to its save location or check in the object to its system location.

► To change objects

1. On Object Management Workbench, choose an object in the project window.
2. Click the Design button in the center column.

   An appropriate design form for the object appears. The current properties of the object appear on the form.

3. Make the necessary changes to the object, and then click OK.

Maintaining Objects in Multiple Software Releases

Same-named objects in different software releases can be modified in OMW in the same project. After adding the objects to the project, you can maintain them independently or you can update one to match the other. When working on objects from separate releases, OMW handles save and check-in file paths for you, based on the Object Management Configuration. You perform the necessary modifications and use the OMW functions as you would normally.

Caution

Changing and maintaining objects in multiple releases can cause problems due to J.D. Edwards object interdependencies. Changing an object in one version and then updating the object in another version to match might cause dependent objects to malfunction.

Before You Begin

- ❑ Determine the paths of the objects that you want to modify.

► To add same-named objects to a project

1. On Object Management Workbench, add the first object to the project.

   Note
   The object is added to the project at the current release level of your J.D. Edwards software.

2. Add the same object to the project again.
3. On the Release Search and Select form, click Find.

   All available releases for which the object can be added to the project appear.

4. Click the release you want, and then click Select.

   The object is added to the project for the selected release level.

► To change the release level of an object on your project

1. On Object Management Workbench, choose Advanced from the Row menu, and then choose Change Release.
2. On the Release Search and Select form, click Find.

   All available releases for which the object can be added to the project appear.

3. Click the release that you want, and then click Select.

   The object is added to the project for the selected release level.

► To update an object to match another object

1. Check out the object A from release A.
2. Modify the object.
3. Check in the modified object A.
4. Check out the object B from release B.
5. Choose object B, choose Advanced from the Row menu, and then choose Advanced Get.
6. Click Yes to override local specifications.
7. On Path Code Search & Select, find and select the path code in which the release A version of the object was checked in, and then click Select.

   In your project, the release B version of the object is modified to match the release A version of the object.

1. Check in object B.

► To update different objects in different releases

1. Check out the object from release A.
2. Modify the object.
3. Check in the modified object.
4. Check out the object from release B.
5. Modify the object.
6. Check in the modified object.

Working with Tokens

In Object Management Workbench (OMW), Object Librarian objects use tokens to minimize the possibility of one user overwriting another user's changes. Each object has a single token, and it is associated with a project when the object is checked out. Checking in the object does not release the token; instead, the token is released when the status of the project changes to a level determined by your system administrator. At that time, another developer can check out the object and receive the token.

The following three actions are allowed while your project holds the token:

- Allow another project to inherit the token. This action forces both projects to be advanced together as if they were one project and allows multiple corrections to a project to be applied to a single object. No matter how many projects have inherited the token, however, only one user at a time can check out the object. For a project to successfully inherit a token, the target project must be at the same status as the source project.
- Switch the token to another project. After the token is switched, the project that loses the token will be placed in the token queue as the first project that is waiting for the token. When you configure OMW, token switching should be restricted to a specific user role so that you can maintain object security.
- Release the token. A project owner can give up the token and allow the next project in the queue to receive it.

OMW might have been configured to release tokens for different object types at different project status levels. Therefore, all object types might not give up their tokens during the same change in project status.

The Token Queue

OMW attempts to acquire a token for an object when you check out an object. If the token is unavailable, the information window displays information about the token, such as which project currently holds it, the user who checked it out, and when the user checked it out. You can join the token queue so that you are notified when the token is released and your project is assigned the token. Projects in the token queue are assigned the token in the order in which the users requested the token. After joining the token queue, you can choose to inherit the token.

When a project has a token, the token stays with that project until the project advances to a status that is configured in the activity rules for release of the token or until it is switched or released manually. When the token is released, the next project in the token queue is notified and assigned the token. Each Object Librarian object has one token per release.

If you join a token queue and then decide later that you do not need the token, remove the object from your project to relinquish your position in the queue.

► **To view the token queue**

1. On Object Management Workbench, click an object in the project window.
2. From the Row menu, choose Advanced, and then choose Token Queue.

   The View Object’s Token Queue form appears. The form shows which project currently holds the token and which projects, in order, are in the queue.

See Also

- *Inheriting Tokens* in the *Object Management Workbench Guide*

Inheriting Tokens

Token inheritance can be useful when developers have the same object in multiple projects for which they would like to implement changes simultaneously, without having to wait for other projects that are holding the token to progress through the project life cycle.

To inherit tokens, both the project holding the token and the inheriting project must be at the same project status. After a token is inherited, these projects will be linked and will automatically advance in project status together. Therefore, if the project status of one project is advanced, the project status of its linked project also advances. If one or more projects are linked through token inheritance, ensure that all development in the linked projects is complete before you advance the projects. The user who is attempting to advance the project must be assigned a role that permits this action in all of the linked projects, or the advance attempt will fail.

All project advancement requirements must be met for all projects that are linked through token inheritance; if one project fails to advance, OMW does not advance any of the other linked projects. If an advancement failure occurs, review the logs for all of the linked projects to determine where the errors occurred.

► To inherit tokens

1. Attempt to check out an object for which another project holds the token.

   The system asks you whether you wish to enter the token queue for the object or inherit the token.

2. Choose to inherit the token, and then click OK.

   Note
   If you have inherited the token but cannot check out the object, the object is already checked out by another user. You cannot check out the object until the other user checks it in or until checkout is erased. This action prevents you from overwriting changes when you inherit the token.

Switching Tokens

A project owner whose role allows switching tokens might take the token from the project that currently holds it and assign it to another project. Switching tokens might be necessary when you need to make an emergency change. If a change in another project needs to be implemented to an object in your project, you can switch the token to the other project to allow the change.

Note

After the token is returned, the user from whom the token was taken can save the object, check the object out, and then restore the object to return the object to its previous state before switching. However, the user must manually implement any changes made during the switch.

To switch a token, you must be an owner in both the holding and the requesting projects. Your role in both projects must be one that allows you to switch tokens at the current status of the project and for the object type.

Before You Begin

- The token requester should attempt to check out the object and then join the token queue.

► To switch a token

1. On Object Management Workbench, choose the object that has the token that you want to switch.
2. Click the Switch Token button on the central column.
3. On Project Token Queue Search and Select, click Find.

   A list of projects in the token queue appears.
4. Choose the project to which you want to give the token, and then click Select.

   The current token owner should save the object before you switch the token.

Releasing Tokens Manually

You can release a token manually if you decide you do not need to modify an object. Additionally, you can release the token if you want to allow the next person in the token queue to check out the object for development. If you have made changes to an object and checked it in, another developer in another project must refrain from checking in the object until after your project has been promoted to a status where the system transfers the object to the next path code, or your changes will not be transferred.

See Also

- *The Token Queue* in the *Object Management Workbench Guide*
- *Advancing Projects* in the *Object Management Workbench Guide*

► To release tokens manually

1. On Object Management Workbench, either erase the check out or check in the object that has the token that you want to release, if appropriate.
2. Choose the object, and then click the Release Token button in the center column.

Working with Users

To be able to perform Object Management Workbench (OMW) tasks, one must first exist as a user in the related J.D. Edwards ERP system. Then, when you add a user to a project, you assign that user at least one OMW role. You can control what actions each user can perform by assigning at least one role to that user. The user role defines the user's function within the project organization. Roles in the OMW system are separate from roles in J.D. Edwards ERP software. When you define user roles, you specify a user defined code value or job title for roles that can be played on a project. You can either assign predefined user roles or create your own user roles.

You can also remove a user from a project by removing all of the user's roles for that project.

Searching for Users

Conduct a search before you add users to a project. You can search for user names or IDs, or you can perform an advanced search and find users based on their class or group.

Note

Searches are case-sensitive. When entering your search criteria, enter the commonly accepted spelling in standard capitals and lower case. If you receive no search results, try different capitalization or spelling.

► To search for users by name or ID

1. On Object Management Workbench, click the Search tab.
2. Complete the following fields:
   - Category

     Enter Owners.
   - Search Type
   - Search

     Entries in this optional field must match the search type that you selected.

     You can use | to specify a search suffix. For example, if the category is Owners and the search type is Address Book#|Search Type, entering *|E displays all entries in the Address Book with a search type of E for employee.
3. Click the Search button next to the Search field.

► To search for users by class or group

1. On Object Management Workbench, click the Search tab.
2. Complete the following fields:
   - Category

Enter Owners.

- Search Type

3. Click Advanced Search.
4. On J.D. Edwards User ID Search and Select, complete one or more of the Query by Example columns and click Find.
5. Choose the users that you want, and then click Select.

Adding Users to Projects

To affect a project and the objects within that project, a user must be added to the project. When added to the project, a user is assigned a specific role. This role dictates the kind of actions that the user can perform. A user can be added to a project more than once with different roles. Additionally, some roles can be associated with several users. For instance, a project might include several developers.

► To add users to projects

1. On Object Management Workbench, click the project to which you want to add the users.
2. Set up a list of users to add to the destination project by performing a search using the Search tab in the information window.
3. On the search form, select the user to be added to the destination project.
4. Verify that the owner's node in the destination project in the project window is highlighted. If it is not highlighted, click it.
5. With the user to be added highlighted, click the Add Object or User to Project button in the center column.
6. On Add User to Project, complete the following fields, and then click OK:
   - Role
   - Lead

Note
To add a user in more than one user role, repeat the add user procedure and choose a second user role for the same user. Different functions are enabled for different user roles, according to their allowed (user) actions. These actions are configured by the administrator for your project using the configuration program of the OMW.

► To remove users from projects

Removing a user from a project does not delete the user from the system.

1. On Object Management Workbench, choose a user in the project window.
2. Click the Remove Object or User from Project button in the center column.

► To change user properties

1. On Object Management Workbench, choose a user (owner) in the project window, and then click Select.
2. On Project User Details, complete the following fields, and then click OK:
   - User Role
   - Project Lead
   - Estimated Hours

Working with Attachments

Object Management Workbench (OMW) allows you to add text, graphic, OLE, and file attachments to projects and to Object Librarian objects within projects. These attachments are available only through OMW; they neither affect the way in which the object functions nor are they available when a user employs the object. You use this feature to document the creation, purpose, and intended use of objects in the system.

See Also

- *Media Object Attachments* in the *Foundation Guide* for information about adding and working with attachments
- *Media Objects and Imaging* in the *System Administration Guide* for information about enabling media objects
- *Creating a Media Object Data Structure* in the *Development Tools Guide*

► To view attachments in Design view

1. On Object Management Workbench, create an object or project, or choose an existing object or project, and click the Design button in the center column.
2. On the design form, click the Attachments tab.

► To view attachments in Object Management Workbench

1. On Object Management Workbench, choose a project.
2. Click the News/Status tab.
3. From the Row menu, choose Attachments.

   If attachments exist, they appear in the information window.

Understanding Object Management Workbench Configuration

The Object Management Workbench (OMW) automates many of the object management tasks users performed manually in previous releases of the software. Much of this automation requires careful configuration by the system administrator through the Object Management Workbench Configuration program.

Use the Object Management Workbench Configuration program to configure the following optional features:

Option	Description
Constants	Enables you to set general constants pertaining to OMW projects.
SAR System Integration	Enables you to disable SAR system integration with OMW and, thus, ERP 9.0 development tools.
Logging System	Enables you to specify the project and object events to be logged. In the event that logging fails, you can also disable development or allow development but disable transfers.
Object Action Notification	Enables you to enable and disable Object Action Notification, which sends a notification message when an action such as checkin or checkout is performed on an object.
Notification Setup	Enables developers to be notified, via subscription, when actions are performed on an object.
Activity Rules	Enables you to add and modify project statuses and object transfer activity rules.
User Roles	Enables you to maintain user roles.
Allowed Actions	Enables you to assign to a user role the actions allowed for each object type during a specific project status.
Save Locations	Enables you to add, modify, and delete the locations where you save objects.

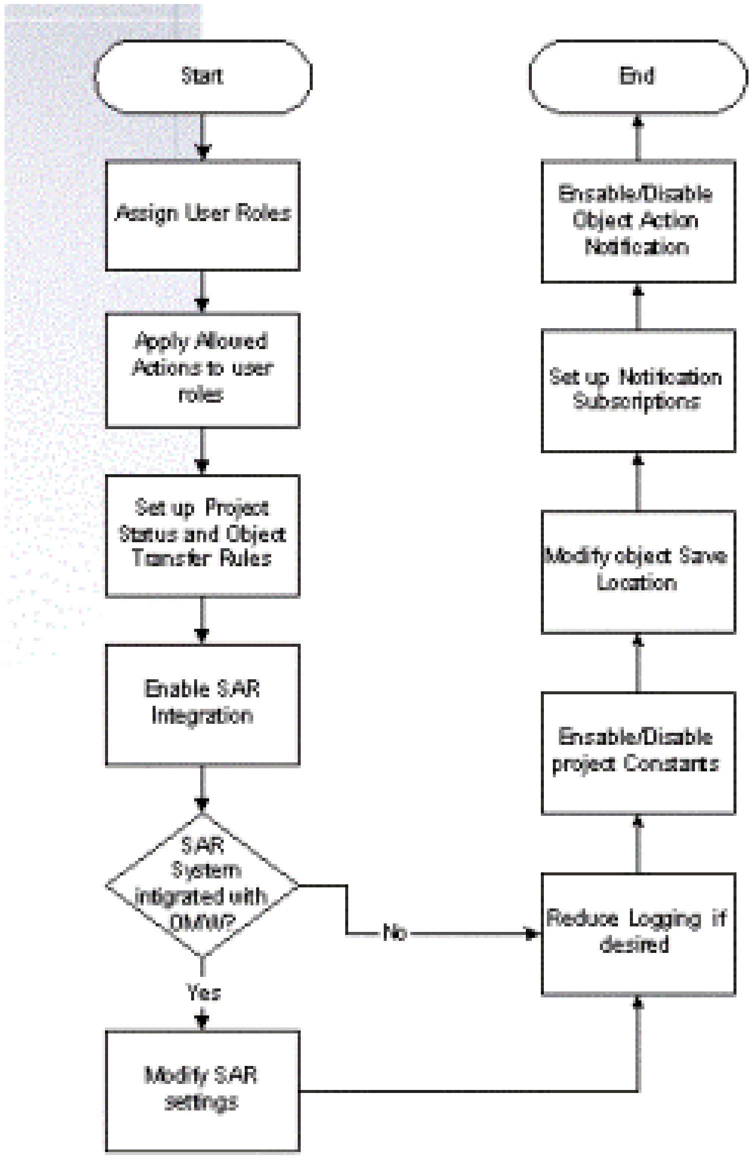
Configuration Process Flow

The recommended process flow for using all of the Object Management Workbench Configuration tools follows. The first three steps require advance preparation:

- Assigning user roles
- Applying allowed actions to users
- Setting up project status rules and object transfer rules

Before configuring these functions, make sure you understand user roles, allowed actions, project status rules, and object transfer rules.

The recommended process flow is as follows:



Activity Rules

The following two types of activity rules exist:

- Project Status Activity Rules
- Object Transfer Activity Rules

Project status activity rules define the possible paths for an Object Management Workbench project. For a given project status, these rules define the possible next project statuses to which the project can be advanced.

For each project status activity rule, one or more object transfer activity rules exist. Each object transfer activity rule defines a FROM and TO location, where objects of this type are moved from and to for a specific software release.

For example, one object transfer activity rule can specify that all APPL objects be transferred from the DV9 location to the PY9 location during a specified project status change.

Allowed Actions

The Allowed Actions form enables you to assign allowed actions to user roles for each object type during a specific project status. You must create the user role before configuring any allowed user actions.

Using allowed actions, administrators can restrict the actions that users with a specific role can perform.

Project and Object Logging

Object Management Workbench logging tracks information about projects and objects. A major log is created whenever:

- A project is created, copied, or deleted.
- The project status is changed.
- A new or existing object is added to or removed from a project.
- An object is created, copied, or deleted.
- An object is checked in, checked out, saved, restored, transferred, or retrieved.

For every significant step or event within these actions, a detail log is created and attached to the major log record.

Project Constants

The Object Management Constants form enables an administrator to set the following general constants pertaining to Object Management Workbench projects:

Type of Constant	Description
Project Status for Users' Personal Default Projects	The default status assigned to a default project within the Object Management Workbench. This project constant can be any one of the standard project status codes.
Project Status for All New Projects	The status assigned to a project when it is first created. This project constant can be any one of the standard project status codes, or you can create a status and code for this purpose.
User Role to be Assigned to the Project's Originator	When a project is created, the originator is added as a user on the project. This project constant defines the user role assigned to the originator.

Object Save Locations

The Object Save Locations form indicates the save location for Object Librarian (OL) objects. Defining the save location will allow users to transfer objects that are saved into the path code specified. Currently, only the save locations for Object Librarian objects may be defined.

Object Action Notifications

The Object Action Notifications form enables you to activate or deactivate object action notification. The Object Action Notification System sends you an e-mail each time an event occurs to one of your objects, such as checkin or checkout. Object action notification is enabled by default.

Notification Subscriptions

The notification system sends e-mail messages to users regarding changes to objects in the system, such as object checkin and checkout. The Notification Subscriptions form allows you to add, delete, and modify notification subscriptions, as well as to sort notification subscription records by criteria that you choose.

Application and User Role Security

You should secure the following applications using application security:

- P98230 - OMW Configuration System
- R98210B - Object Management Log Purge
- P98231 - OMW Transfer Activity Rules Director

Securing User Roles

You can prevent users from adding a user to a project by using row-level security on the F98221.puomwur field. This field contains the user role user defined code for each user in a specific project.

However, all users must be able to add the following user roles when setting up a new project:

- Originator
- Supervisor
- Manager
- Developer
- QA
- Product Support

The administrator role should be secured from all but a few users. Because manager and supervisor roles cannot be secured, consider creating a product manager or similar role that can be secured. This new user role can be granted security attributes, such as being allowed to switch a token from one project to another.

Securing Administrative Updates

You should secure all actions, including project status change, for project statuses 40 (Production Development), 41 (Transfer Production to Prototype), and 42 (Transfer Prototype to Development). These statuses allow administrators to apply fixes to objects in the Production path code and then to promote the objects back to development. The ability to do so should be limited to administrators only.

Choosing a Configuration Option

All configuration options are set up through the OMW Configuration System application (P98230). You choose the option that you want to configure by clicking the button that corresponds to the desired option.

► To choose a configuration option

From the Cross Application Development Tools menu (GH902), choose Object Management Configuration (P98230).

1. If necessary, click the General tab to display function options.
2. Click one of the following buttons to configure the corresponding function:
   - Constants
   - SAR System Integration
   - Logging System
   - Object Action Notification
   - Notification Setup
   - Activity Rules
   - User Roles
   - Allowed Actions
   - Save Locations

Configuration Settings Indicators

Some of the function buttons on the Object Management Setup Form have setting indicators next to them. Settings indicators describe the current setting for the SAR System Integration, Logging System, and Object Action Notification options. The purpose of each setting indicator is as follows:

Indicator	Description
SAR System Integration Indicator	Indicates whether the SAR (Software Action Request) system is integrated with the Object Management Workbench. SAR integration is enabled or disabled.
Logging System Indicator	Indicates whether full or reduced logging of project or object events is selected.
Object Action Notification Indicator	Indicates whether the object notification system is enabled or disabled.

Configuring User Roles and Allowed Actions

Configuring user roles and allowed actions is one of the most important Object Management Workbench (OMW) configuration tasks. OMW's automation relies on an administrator who carefully configures these areas.

The following table shows the allowed user actions that J.D. Edwards recommends for each user role, the project status at which these actions should be authorized, and the responsibility of the person in that user role:

Recommended Project Status	User Role	Recommended Allowed Action	Explanation
11 - New Project Pending Review	Originator	Status Change	Originator might need to advance the status to 91 - Cancelled Entered in Error
	Manager, Supervisor	Update Project	Change values for the project
		Update Users	Change values for the user
		Status Change	Advance project to the next status
21 - Programming	Developer	Add Objects	Add objects to project in order to fix or enhance
		Remove Objects	Remove objects that were incorrectly added
		Check out	Check out objects from the server
		Check in	Check in objects to the server
		Get	Get objects from the server
		Status Change	Advance project to the next status
25 - Rework-Same Issue	Developer	Status Change	Change project to 21 - Programming status
26 - QA Test/Review	Quality Analyst	Get	Get objects from the server
		Status Change	Advance project to next status
28 - QA Test/Review Complete	Manager, Supervisor	Update Project	Change values for the project
		Status Change	Advance project to the next status
38 – In Production	Manager, Supervisor	Status Change	Advance project to the next status

01 - Complete	Developer	Remove Objects	Remove objects from projects at status 91 that might have been added but not removed

Note

You might want to allow the Manager and Supervisor roles to perform the same actions as the Developer role, in case the Developer cannot perform assigned duties or needs to have work verified.

The default allowed actions listed in the following table cannot be changed. This information is provided for reference only:

Value	Description
02	Check In
03	Check Out
04	Delete
05	Add
06	Copy
08	Save
09	Restore
10	Design
11	Get
12	Remove object from project
13	Update a project
16	Add object to a project
21	Switch token
23	Force release from token queue
30	Erase check out

The default object types in the following table are provided for reference only:

Value	Description
01	Object Librarian objects
02	Data items
03	Versions
04	UDCs
05	Menus
06	Documentation record (SAR object)
11	Transfer record (SAR object)
12	History record (SAR object)

► To modify a user role

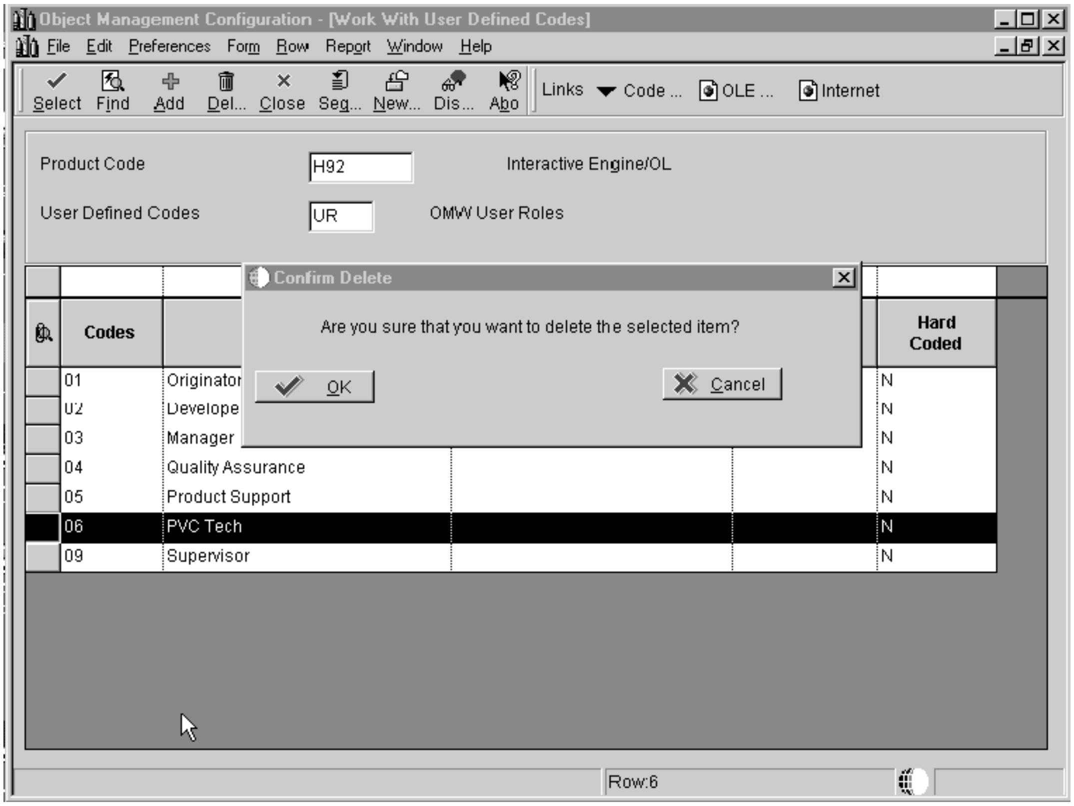
From the Object Management menu (GH9081), choose Object Management Setup (P98230).

1. From the Object Management Setup form, click User Roles.
2. Choose the user role you want to modify.
3. Double-click the first field that you want to change, and modify it.
4. Repeat step 3 to make all modifications required.
5. Click Find and verify that the modifications you made appear in the list.
6. Click OK.

► To delete a user role

From the Object Management menu (GH9081), choose Object Management Setup (P98230).

1. From the Object Management Setup form, click the User Roles button.
2. Click the cell to the left of the User Role you want to delete.
3. Click Delete.



4. In the Confirm Delete query, click OK.
5. Repeat steps 2 through 4 to delete all desired user roles.
6. Click Find to verify that the user roles have been deleted.
7. Click OK.

Setting Up Allowed User Actions

The Allowed Actions Form lets you assign allowed actions to user roles for each object type during a specific project status. The following user defined codes (UDCs) define allowed Object Management Workbench actions involving objects:

- 02 – Check in
- 03 – Check out
- 04 - Delete
- 05 - Add
- 06 - Copy
- 07 - Install
- 08 - Save
- 09 - Restore
- 10 - Design
- 11 - Get

- 12 - Remove object from project
- 13 - Update the project
- 16 - Add an object to the project
- 21 - Switch tokens
- 23 - Release from token queue
- 30 - Erase check out
- 38 - Status change

For example, if you want the developer to be allowed to check in all object types when the project is at project status 21, you would enter 02 - Developer in the User Role field, *ALL in the Object Type field, select 02 – Check in in the Allowed Action field, and 20 - Programming in the Project Status field.

Note

Before setting up allowed actions, you must add the user role to the User Roles UDC by using the User Defined Code form.

► To set up allowed user actions

1. From the Object Management Setup form, click the Allowed Actions button.
2. Click Find to display previously defined user actions.
3. To create a blank row in which to add a definition, sort on the allowed user action to be worked on.
4. Complete one or more of the query by example (QBE) columns and click Find.
5. Scroll to a blank row at the bottom of the sorted list.
6. Complete the following fields in the blank row:
    - User Role
    - Object Type
    - Project Status
    - Action

    Note
    You can enter *ALL in any field except User Role. Typing *ALL in a field indicates that the user role chosen can work with all object types, project statuses, or actions.

    After you complete a row, a new row appears.
7. Repeat this procedure until all allowed user actions are set up.
8. Click OK.

Configuring Object Management Workbench Functions

To configure Object Management Workbench (OMW) functions, you can disable the Software Action Request (SAR) system. This action is necessary if your company does not use SARs. You can also control logging detail and disable or limit development when logging fails. Finally, you can set up project constants to track the course of project development.

Disabling SAR Integration

Most companies do not have the SAR (Software Action Request) system. You can verify that SAR integration is disabled by checking the settings indicator to the right of the SAR System Integration button on the Object Management Setup Form.

If you do not have the SAR System installed and the SAR System Integration settings indicator shows that SAR integration is enabled, you must disable SAR integration.

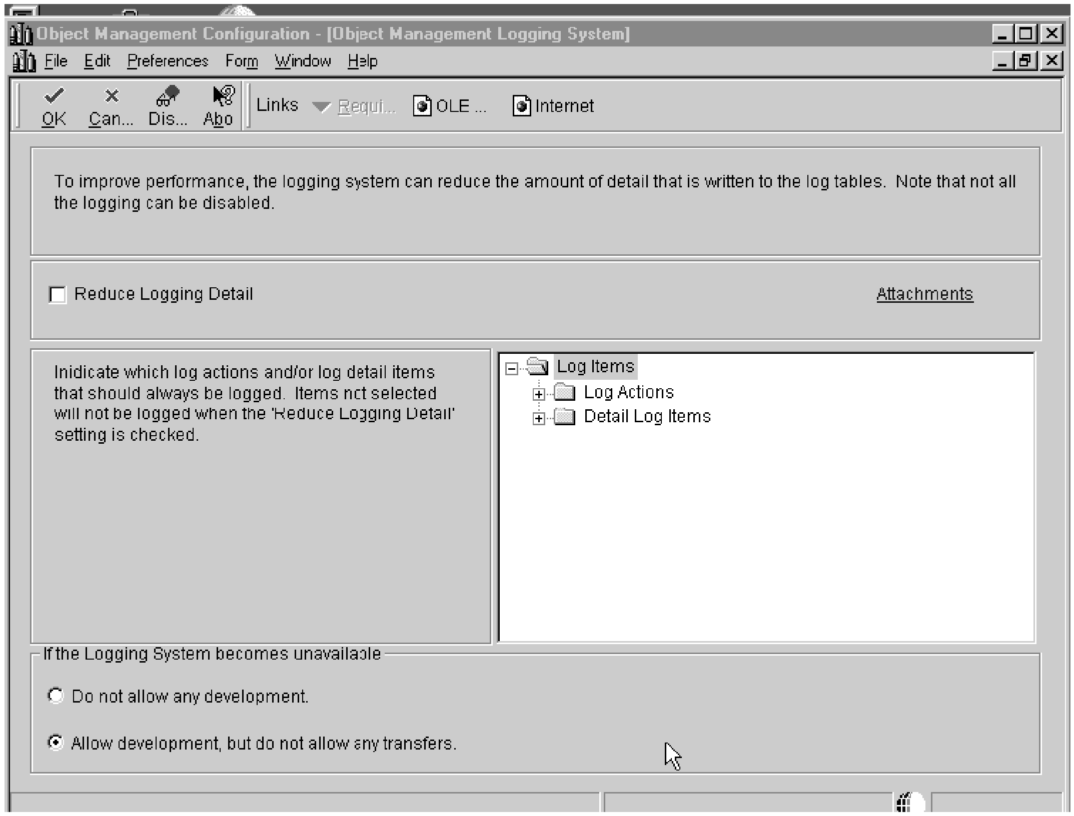
► To disable SAR system integration

1. Click the SAR System Integration button on the Object Management Setup form.
2. Make sure the Integrate SAR System option is blank.
3. Verify that all other fields are grayed out and deselected.
4. Click OK.

► To control logging detail

The Object Management Logging System form enables you to specify which project and object events you wish to have logged.

1. From the Object Management Setup form, click the Logging System button.

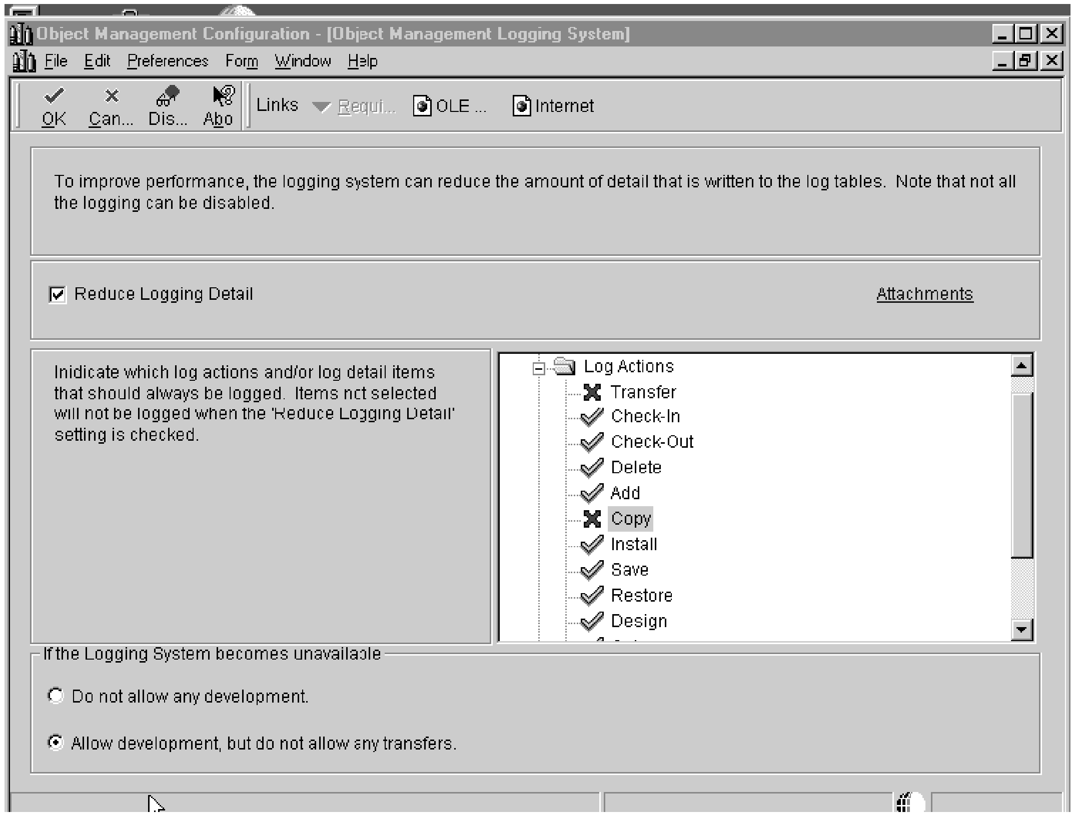


2. Click the Reduce Logging Detail option.

   A check mark appears next to the option chosen.

3. Double-click the Log Actions and Detail Log Items folders.
4. Double-click items for which you do not want to log details.

   A red X appears next to the deselected items.



5. Repeat step 3 to deselect all unwanted log detail items.
6. Click OK.

► To control development in the event of logging failure

The Object Management Logging System form also enables you to disable development or to allow development but disable transfers if logging fails.

1. On the Object Management Setup form, click the Logging System button.
2. To disable development if logging fails, choose the Do not allow any development option.
3. To permit development but disable object transfers in the event of a logging failure, choose the Allow development but do not allow any transfers option.

Note
The Allow development but do not allow any transfers option is chosen by default.

4. Click OK.

Setting Up Project Constants

The Object Management Constants form enables you to set general constants pertaining to OMW Projects. These project constants are:

- Project status for users' personal default projects

- Project status for all new projects
- User role to be assigned to the project originator

► To set up project constants

1. Click the Constants button on the Object Management Setup form.
2. To enter a project status for a user's personal default project, click the visual assist for the following field:
    - Enter the Project Status for user's personal default project
3. Double-click a project status.
4. To enter the initial project status for all new projects, click the visual assist of the following field:
    - Enter the initial Project Status for all new projects
5. Double-click a project status.
6. To enter the User Role to use when assigning the originator to a project, click the visual assist for the following field:
    - Enter the User Role to use when assigning the originator to a project
7. Double-click a project status.

Note
You can click the Attachments buttons next to the three fields to view their respective attachments.

Configuring Activity Rules

The Activity Rules button on the Object Management Setup form enables you to set up both project status activity rules and object transfer activity rules. Project status activity rules define the activities that occur during a project development cycle. Object transfer activity rules work in conjunction with project status activity rules, and define the From and To locations for moved objects.

Setting Up Project Status Activity Rules

You can set up statuses for a project as development progresses from one phase to the next. For example, the project might move from a programming phase to a manager review phase. For each of these transitions you will define the following:

- Whether this project status rule is active
- The System Role to which this project status transition applies
- The related “To” project status
- The related “From” and “To” SAR* statuses

  Complete the From and To SAR status only if you have SAR integration turned on.

The default project statuses and their definitions are:

01 - Complete

11 - New Project Pending Review

21 - Programming

25 - Rework-Same Issue

26 - QA Test/Review

28 - QA Test/Review Complete

38 - In Production

40 - Production Development

41 - Transfer Production to Prototype

42 - Transfer Prototype to Development

45 - Pristine Get

91 - Cancelled Entered in Error

► **To set up project status activity rules**

1. From the Object Management Setup form, click the Activity Rules button.
2. Click Find.

All available From project statuses appear.

3. Click the From Project Status for which you want to set up one or more To project statuses.
4. Click Select.

   Project Status Activity Rules lists all valid To project statuses for the From project status you chose.

   The current project status appears in the From Project Status field.

5. Scroll to the blank row at the bottom of the list and complete the following fields:
   - Active

     This field can be used to allow only specific users or only users who are members of a specified group to perform a status change. To make the rule available to everyone, enter *PUBLIC in this field.

   - User/Role
   - To Project Status
   - From SAR Status

     Complete for projects with SARs and only if you have SAR integration turned on. If SAR integration is disabled, these columns are disabled.

   - To SAR Status

     Complete for projects with SARs and only if you have SAR integration turned on. If SAR integration is disabled, this column is disabled.

   A blank row appears below the row you completed.

6. Repeat step 5 to set up or modify other To project status entries for this particular From Project Status.
7. Click OK when you are done.
8. Choose the next From Project Status and repeat steps 5 through 7 to set up project activity rules for each remaining From Project Status.
9. When all project activity rules are complete, click OK to return to the Work with Object Management Activity Rules Form.
10. Click Close.

Setting Up Object Transfer Activity Rules

You must configure object transfer activity rules for each object type used in a project that you want to perform an action on.

For each object type you want to perform an action on, you must define the following information:

- Determine project statuses when users can check in, check out, and get objects. Getting an object means copying its specifications to your work area without checking it out.

- Determine at which status change you would like objects to be transferred.
- Determine project statuses when object tokens are released.

The following object location tasks must be performed when setting up object transfer activity rules:

- Define FROM and TO transfer locations for each object type at each project status transition—for example, when project status 21 (development) changes to project status 26 (prototype). In this example, objects are transferred from DV9 to PY9.
- Define checkout and get locations for Object Librarian object types.
- Define checkin locations for Object Librarian objects.

Note

Transfer activity rules can occur in any order. For example, you might have one status change that will require more than one object transfer. If you expect an object to transfer from DV9 to PY9 and then to PD9, you will want to set up rules to transfer the object from DV9 to PY9 and from DV9 to PD9 because the object could be retrieved in any order.

► To set up object transfer activity rules

1. From the Object Management Setup form, click the Activity Rules button.
2. Click Find to display all available project statuses.
3. Double-click the From Project Status folder for which you want to set up object transfer activity rules.
4. Click one of the related To project statuses.

   This field defines the To Project Status, which completes the From and To Project Status transition for which you want to configure object transfer activity rules. For each From and To Project Status transition, you can create multiple object transfer activity rules for different object types.
5. Click Select.
6. Scroll to the blank row at the bottom of the list. Complete the following fields for the object type desired:
   - Active
   - User/Role

     This field can be used to allow the activity rule to apply only specific users or only users who are members of a specified group. To make the rule available to everyone, enter *PUBLIC in this field.
   - Object Type

   Note
   *ALL may not be used when defining transfer activity rules.

   - From Location

- To Location

Note
Object Librarian objects use path codes for the From Location and To Location values, whereas non-Object Librarian objects use data source values. For Versions, if a path code is entered, the F983051 record and the specs for the version are transferred (for batch versions), and if a data source is entered, just the F983051 record is transferred between the defined locations.

- From Release

  This field contains the release level of ERP 9.0 that you are currently working on. The From Release value should be the same as the To Release value.

- To Release

  Currently not used. This field is populated with the From Release value.

- Release Token
- Allowed Action

A blank row appears when you have finished. When you set up transfer activity rules for Workflow objects, an additional form appears. Use the form to provide From and To Data Source values for the F98811 (Activity Specifications table) records.

7. Repeat this procedure to set up or modify other object types for this project status transition.
8. Click OK to return to the Object Management Activity Rules form.
9. Choose the next From and To project status transition, and repeat this procedure to set up its object transfer activity rules.
10. Repeat step 9 until all object transfer activity rules are complete.
11. Click OK to return to the Object Management Activity Rules form.
12. Click Close.

Note
When you set up transfer activity rules for APPL objects, you must also define rules for User Override Object types so that OMW can transfer any *PUBLIC user overrides for the APPL objects. If you do not do so, APPL objects will not transfer successfully.

Project Promotion Life Cycle

The normal project promotion life cycle is as follows:

11 > 21 > 26 > 28 > 38 > 01

where

11 = New project pending review

21 = Programming

26 = QA test/review

28 = QA test/review complete

38 = In production

01 = Complete

During a normal project promotion cycle, developers check objects out of and into the Development path code; promote them to the prototype path code; and then promote them to the Production path code before declaring them complete.

Administrators can follow a different promotion cycle, as follows:

11 > 40 > 41 > 42 > 01

where

11 = New project pending review

40 = Production development

41 = Transfer from Production to Prototype

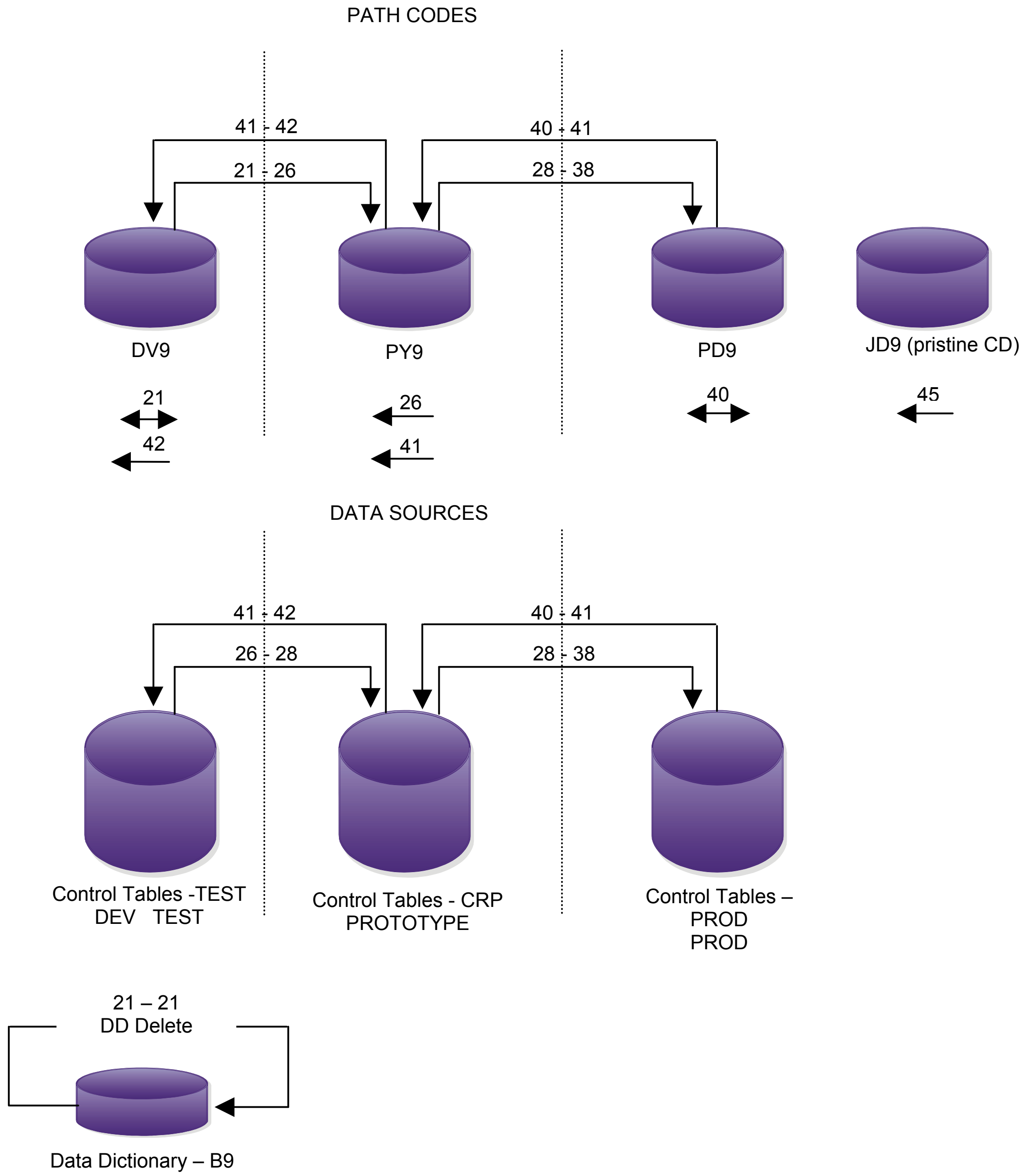
42 = Transfer from Prototype to Development

01 = Complete

During this promotion cycle, administrators check objects out of and into the Production path code to apply fixes, and then demote the objects to the Prototype path code and the Development path code. Developers should not use this promotion cycle; J.D. Edwards recommends that you apply status activity rules that limits this promotion cycle to a specific group -- those with the User ID for administrators.

The following illustration shows the project promotion life cycle:

Project Promotion Life Cycle



Configuring Object Save Locations

Using Object Management Workbench (OMW), you can create a save location, which is a path code developers use to save their objects. With the save location created, you add the path code to the system, allowing saved objects to be transferred. You can also modify or delete save locations.

Creating a Save Location

During the installation process, an additional path code might not have been created to use as your OMW save location. To use this feature, you must create a path code where developers can save their objects while they are in development. When users perform a Save, their objects are checked into the path code defined as the save location; when they perform a Restore, objects are retrieved from this location.

► To add an object's save location

The Object Save Locations form indicates the save-off location for Object Librarian (OL) objects. Defining the save location will transfer objects that are saved into the path code specified. Currently, only the save locations for Object Librarian objects may be defined.

1. Click the Save Locations button on the Object Management Setup form.

   The Location column contains the names of path code where your version of ERP 9.0 is installed.

2. To add a new save location, click a blank field in the Location column.
3. Click the visual assist button.
4. Locate and double-click the current location of the object.

   The Object Save Locations form reappears with your object's current location in the Location column.

5. In the same row, scroll to and double-click the Save Location field located to the right of the Location field clicked previously.
6. Click the visual assist button.
7. Scroll to and double-click the new save location of the object.

   The Object Path Save Locations form reappears with your object's new save location in the Save Location column.

8. Click OK.

► To modify an object's save location

The Object Save Locations form enables you to modify the save location for Object Librarian objects, which might be necessary during a project.

1. Click the Save Locations button on the Object Management Setup form.
2. Click the Save Location field.
3. Click the visual assist button.

4. Scroll and double-click the object's new save location.

   The Object Save Locations form reappears with the modified object save location in the Save Location column.

5. Click OK.

► To delete an object save location

If an Object Librarian object is deleted, you should also delete the object's save location in order to delete the save location completely from the system.

1. On the Object Management Setup form, click the Save Locations button.
2. On Object Save Locations, choose the record to be deleted.
3. Click Delete.
4. Click OK in the Confirm Delete box.
5. Click OK.

Configuring Notification Subscriptions

Notification subscriptions allow you to alert users via e-mail regarding changes to objects in the system, such as object checkins and checkouts. After you enable object notification, you can add, modify, delete, or sort notification subscriptions. The Object Action Notification System is initially enabled by default.

► To enable or disable object action notifications

1. On the Object Management Setup form, click the Object Action Notification button.
2. To enable object action notification, choose the Activate Object Action Notification option.
3. To disable object action notification, clear the Activate Object Action Notification option.
4. Click OK.

Note
Notification that users are added to or removed from projects always occurs, even when object action notification is disabled. In this situation, an e-mail message is sent to the user.

► To add a notification subscription

1. From the Object Management Setup form, click the Notification Setup button.
2. Click Find to display the current notification subscriptions.
3. Scroll to a blank row and complete the following mandatory fields:
   - User Class or Group
   - Action
4. Complete the following optional fields:
   - Object Type
   - Object Name
   - Reporting System Code
   - Path Code

   A new row appears when you are done.
5. Repeat steps 3 and 4 until all notification subscriptions are added.
6. Click OK.

Note
Notification Subscriptions can be created for an action performed on the following objects:

- All objects of the specified system code.

- All objects of a specified type.
- All objects of a combination of 1 and 2.
- A specific object name and type.

► To modify a notification subscription

1. From the Object Management Setup form, click the Notification Setup button.
2. On Notification Subscriptions, click Find to display the current notification subscriptions.
3. Choose the fields to be modified and make your changes.
4. Click OK.

► To delete a notification subscription

1. From the Object Management Setup form, click the Notification Setup button.
2. On Notification Subscriptions, choose the record to be deleted.
3. Click the Delete button.
4. Click OK in the Confirm Delete query.
5. Click OK.

► To sort notifications subscriptions

1. From the Object Management Setup form, click the Notification Setup button.
2. Above the rule headers, click the Query by Example column to be filtered.

   If a visual assist appears, click it and double-click your filter criteria. In other Query by Example columns, enter your filter criteria.

3. Click Find.

   The filtered notification subscriptions appear.

4. Click OK.

Working with Logs

Object Management Workbench (OMW) contains an object management logging application. Project and object logs provide an excellent way to review the development history of projects or objects. Furthermore, you can view log details for any log record currently appearing on your monitor. From the Work With Log Detail form, you can bring up the actual log entry in the View Full Log Text window.

This application also allows you to rearrange log fields to customize software development reporting. You can view all logs, view sorted logs, or show only the last logging action for an object or project. The following two tasks must be performed together to produce customized project and object development reports.

- Reorder log record fields
- Print logs.

► To view project or object logs

1. On Solution Explorer, type GH902 in the Fast Path field and press Enter.
2. From Cross Application Development Tools, choose Object Management Logging.
3. On Work With Object Management Log, perform one of the following actions:
   - Click Find to view logs for all projects and their objects in OMW.
   - Enter sorting criteria in the Query by Example cells to filter search results, and then click Find.
   - Turn on the Show Only Last Action option to show only the last logging action for a given project or object.
4. Click Close.

► To locate object logs

1. In Solution Explorer, type GH902 in the Fast Path field and press Enter.
2. From Cross Application Development Tools, choose Object Management Logging.
3. On Work With Object Management Log, click Form and then click Object Logs.
4. On Work With Object Logs, you can do the following:
   - Click Find to show all OMW object logs.
   - Enter data in the Query by Example cells to narrow your search and click Find.
   - Turn on the Show Only Last Action option to show only the last logging action.
   - Click the Check for Attachments button to check for object attachments.
5. Click Close.

► To locate project logs

1. On Solution Explorer, type GH902 in the Fast Path field and press Enter.
2. From Cross Application Development Tools, choose Object Management Logging.
3. On Work With Object Management Log, click Form and then click Project Logs.

4. On Work With Project Logs, you can perform the following functions:
   - Click Find to show all OMW project logs.
   - Enter data in the Query by Example cells to narrow your search, and then click Find.
   - Turn on the Show Only Last Action option to show only the last logged action for the selected project.
   - Click the Check for Attachments button to check for attachments.
5. Click Close.

► To view detail logs

1. Double-click any log record you wish to research. Or, click the desired log record row to highlight it, then click Select.
2. Click Find.

   The detail log record for the selected log appears. All sequence details for the selected Log record appear in ascending numerical order.

3. To view the full text of the Description field, click it, and then click Select.

   The View Full Log Text window appears, showing the actual log entry.

4. You can move between detail logs by clicking the Previous and Next buttons.
5. Click Close.

► To reorder log record fields

1. In Solution Explorer, type GH902 in the Fast Path field and press Enter.
2. From the Cross Application Development Tools, choose Object Management Logging.
3. On Work With Object Management Log, click Sequence.
4. Click the first column you want to sort in the Columns Available window.
5. Click the right-pointing arrow to move it to the Columns Sorted window on the right.
6. Repeat steps 3 and 4 as required until all the columns you wish to view are in the correct sort order.

   If you make an error, you can move columns back to the Columns Available window for resorting. Select the column to be resorted and the left-pointing arrow.

7. Click OK in the Select Grid Row Sort Order form to reorder the log columns.

► To print logs

From the Cross Application Development Tools menu (GH902), choose Object Management Logging (P98210).

1. On Work with Object Management Log, click File and then Print Screen.
2. Modify print settings as required.
3. Click OK in the Print form.