PeopleSoft

EnterpriseOne 8.93
Web Client
PeopleBook

May 2004

EnterpriseOne 8.93
Web Client PeopleBook
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Open Source Disclosure

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About These EnterpriseOne PeopleBooks Preface

EnterpriseOne PeopleBooks provide you with the information that you need to implement and use PeopleSoft EnterpriseOne applications.

This preface discusses:

- EnterpriseOne application prerequisites
- Obtaining documentation updates
- Typographical elements and visual cues
- Comments and suggestions

Note

EnterpriseOne PeopleBooks document only fields that require additional explanation. If a field is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line.

EnterpriseOne Application Prerequisites

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

See the *Foundation Guide*.

You might also want to complete at least one EnterpriseOne introductory training course.

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

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

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection Website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You can find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Note

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

See Also

PeopleSoft Customer Connection Website, *http://www.peoplesoft.com/corp/en/login.jsp*

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions
- Visual cues

Typographical Conventions

The following table contains the typographical conventions that are used in EnterpriseOne PeopleBooks:

Typographical Convention or Visual Cue	Description
Italics	Indicates emphasis, topic titles, and titles of PeopleSoft or other book-length publications. Also used in code to indicate variable values.
Key+Key	A plus sign (+) between keys means that you must hold down the first key while you press the second key. For example, Alt+W means hold down the Alt key while you press W.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicates an adjective that is used in a way that might not be readily understood without the quotation marks, for example "as of" date, “as if” currency, "from" date, and "thru" date.
Cross-references	EnterpriseOne PeopleBooks provide cross-references either below the heading “See Also” or preceded by the word See. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Visual Cues

EnterpriseOne PeopleBooks contain the following visual cues:

- Notes
- Cautions

Notes

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

Note

Example of a note.

Cautions

Text that is preceded by *Caution* is crucial and includes information that concerns what you must do for the system to function properly.

Caution

Example of a caution.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager, PeopleSoft Inc., 4460 Hacienda Drive, Pleasanton CA 94588

Or you can send e-mail comments to *doc@peoplesoft.com*.

While we cannot guarantee an answer to every e-mail message, we will pay careful attention to your comments and suggestions.

Using the PeopleBooks Online Library

This section provides an overview of the PeopleSoft Online Library and discusses:

- Navigating Through the PeopleSoft Online Library
- Searching Through the PeopleBooks Online Library

The PeopleSoft Online Library (PSOL) is an HTML-based tool that contains comprehensive documentation for PeopleSoft EnterpriseOne application and tools. Use this documentation as an online research library. The PeopleSoft Online Library is organized hierarchically, like a library of books. It provides standard navigation and search capabilities, including an expandable table of contents, a keyword index, and a full-text search feature.

Navigating Through the PeopleSoft Online Library

This section discusses:

- Accessing the PeopleBooks interface
- Enabling the Reference Pane
- Navigating Between Books and Chapters
- Navigating Within a Chapter
- Using the Table of Contents
- Using the Index

Accessing the PeopleBooks Interface

When you open the PeopleSoft Online Library home page, the PeopleBooks Online Library appears in your browser. When you click the PeopleBooks link, the PeopleBook interface appears in your browser with a list of available PeopleBooks.

After you choose a PeopleBook, the PeopleBook interface displays information in the following three panes:

- Document pane

  The pane on the right side of the window; displays the document HTML file, which corresponds to a chapter in the PeopleBook.

- Navigation pane

  The pane above the Document pane; contains display options, navigation controls, and the current PeopleBook and chapter titles.

- Reference pane

The pane on the left side of the window; contains three tabs: Contents, Index, and Search. Use these tabs to explore the PeopleBooks or to locate a specific topic. You can hide the Reference pane to maximize the size of the Document pane.

Enabling the Reference Pane

If the Reference pane (with the Contents, Index, and Search tabs) does not appear, click the Show Reference Pane button in the Navigation pane at the top of the browser. To hide the Reference pane, click the Hide Reference Pane button.

Navigating Between Books and Chapters

Use the Navigation pane to view information about the current PeopleBook, and to navigate between PeopleBooks or between chapters in the current PeopleBook.

Click the links at the bottom of the Navigation pane to access the PeopleSoft Online Library home page (Home), the PeopleBooks Library home page, and the first page of the current PeopleBook.

Use the following buttons in the Navigation pane to navigate through each PeopleBook:

Button	Description
Previous (left directional arrow)	Click Previous to go to the previous chapter in the book.
Next (right directional arrow)	Click Next to proceed to the next chapter in the book.
First	Click First to go to the first chapter in a book.
Last	Click Last to go to the last chapter in a book.

Note

These buttons move you to the previous or next file in the sequence in which the chapter files are organized in the book, not (as with a browser's Forward and Back buttons) in the sequence in which you opened the files.

Navigating Within a Chapter

Use the navigation features in the Document pane to navigate within a chapter. Click a cross-reference link to go to a related topic. These links appear in See Also headings.

Use the following buttons in the Document pane to navigate within a chapter:

Button	Description
Top (up arrow)	Click Top to go to the top of the current chapter.
Previous (double arrows)	Click Previous to go to the beginning of the parent section.

Using the Table of Contents

Click the Contents tab to display the table of contents for the current PeopleBook. Use the following functions in the Contents tab to navigate through the current PeopleBook:

Feature	Description
Closed folder (with plus symbol)	Click a closed folder icon to expand a chapter.
Open folder	Click an open folder icon to collapse a chapter.
Section (document symbol)	Click a section icon to open to the section.
Synchronize	Click the Synchronize button to open the Table of Contents to the topic that is currently displayed in the Document pane.
Expand All	Click Expand All to open all of the folders in the Table of Contents.
Collapse All	Click Collapse All to close all of the folders in the Table of Contents.
Keep TOC synchronized with document	Click this option to automatically synchronize the Table of Contents as you navigate through the chapters.

Using the Index

Click the Index tab to search through a keyword index of the current PeopleBook. To display an index topic, enter a keyword in the text box, or scroll to the keyword and click it. The document appears at the associated topic unless multiple topics exist.

Searching Through the PeopleBooks Online Library

This section discusses:

- Performing a Simple Search
- Performing an Advanced Search

Performing a Simple Search

To perform a simple search, enter the text for which you want to search, and then press Enter or click the Search button. The Search list box displays all of the topics that contain the text that you entered, along with the PeopleBook in which each topic belongs.

Note

When you use this tab on the PeopleSoft Online Library home page, the system only searches through the first group of guides, or the guides associated with the first link. To search through a different group of guides, click the appropriate link to display the list of guides, and then perform a simple search. The system searches through all the guides in the list.

The simple search form uses an *accrue* logic when searching. That is, it finds results that contain any or all of the terms which you entered, with priority given to documents that contain all or most of the keywords. The results appear sorted by book title and then by score.

When you search on multiple words, the system displays topics that contain any of the words in the search criteria. However, if you want the search to return topics that contain all of the words in the search criteria, surround the words with quotation marks, for example "Accounts Receivable Features."

Performing an Advanced Search

Use the Advanced Search options to expand your search. You can define the type of search to perform and refine your search results. Click the Advanced Search link on the Search tab to access the following Advanced Search options:

- Full Text

  Choose this option to perform a full text search. The Search list box displays all of the chapters with text that matches your search criteria, along with the PeopleBook wherein the chapters belong.

- Chapter Title

  Choose this option to search for text within chapter titles only. The Search list box displays all of the chapter titles that contain the text that you entered, along with the PeopleBook in which the chapters belong.

- Search Within Results

  Choose this option in combination with the Full Text or Chapter Title option to refine your search results.

EnterpriseOne Web Application User Interface

Most PeopleSoft EnterpriseOne applications are available on the Web. These applications provide the same functions as their Windows counterparts, although the interface differs somewhat due to differences between the two platforms.

EnterpriseOne Web-based applications are powered by the JAS server, which a system administrator configures when implementing the EnterpriseOne. However, Web and Windows applications both reference the same database tables for the most part, so Web and Windows users can use the same system simultaneously, and both can see all changes in real time, depending on the constraints of your system. Additionally, the JAS server can communicate with pervasive devices, so you can access certain EnterpriseOne from such devices as well.

A user can sign in to the Web client directly, or she can sign in through either the Collaborative Portal or Enterprise Portal, depending on how a system administrator configures the system. When signing in directly or through the Collaborative Portal, users access EnterpriseOne through EnterpriseOne Menu. Users who sign in to the Web client directly see EnterpriseOne Menu as a standalone interface, while users who sign in through the Collaborative Portal access EnterpriseOne Menu through a portlet. EnterpriseOne Menu is the Web counterpart of the Windows-based Solution Explorer, and it provides many of the same features.

Note

The standalone version of EnterpriseOne Menu differs slightly from the portlet version. Therefore, they are treated as separate entities in this document.

Through the Enterprise Portal, users access EnterpriseOne applications via hyperlinks in the Portal's menus.

Accessing the EnterpriseOne Web Client

Accessing PeopleSoft EnterpriseOne applications on the Web is similar to accessing files and applications on a company network. Typically, either when you start your computer or when you want to access company network directories, you must sign in to identify yourself to the system as an employee who has the right to access company resources. After you sign in, you can access files and applications on the network. Similarly, you must sign in the Web client—the gateway through which you access EnterpriseOne—before you can launch EnterpriseOne applications.

To sign in to the Web client, your computer must have access to your company’s intranet, you must have a Web browser installed on your computer, and your system administrator must create an account for you. If you are using a pervasive device, however, all you need is an account. When your system administrator sets up your account, he or she creates a user ID and assigns you a password.

Accessing the EnterpriseOne Web Client directly

Usually, you must enter your ID and password when you launch the Web client. However, your system administrator can configure your computer in such a way so that you appear to bypass the signin process. For security reasons, however, most system administrators want users to sign in manually.

When you sign in to the Web client, EnterpriseOne Menu appears. EnterpriseOne Menu allows you to access EnterpriseOne applications, reports, and other features.

Accessing the EnterpriseOne Web Client through the Collaborative Portal

When you sign in to the Collaborative Portal, the Portal can pass your signin information to EnterpriseOne. Therefore, all you must do is bring up a workspace containing the EnterpriseOne Menu portlet. The EnterpriseOne Menu portlet allows you to access EnterpriseOne applications, reports, and other features.

Accessing the EnterpriseOne Web Client through the Enterprise Portal

When you sign in to the Enterprise Portal, the Portal can pass your signin information to EnterpriseOne. To access specific EnterpriseOne applications, reports, or features, your system administrator must provide you with specific menu options. Choose a menu option to launch a specific EnterpriseOne object.

► To sign in to the EnterpriseOne Web client directly

Follow this task to sign in to the EnterpriseOne Web client if you do not use a portal.

1. Launch your Web browser and navigate to your company's EnterpriseOne Web signin.

   Depending on how your system administrator has configured your system, the Web signin might appear when you launch your browser, you might need to click a button or a hyperlink, or you might need to navigate to a particular page. If you do not know how to find the EnterpriseOne Web signin, contact your system administrator.

2. Complete the following fields:
   - User ID
   - Password
3. If your system administrator indicated that you must sign in to a particular environment, click Details and complete the following field:
   - Environment
4. If you have multiple roles and wish to sign in as one of them, click Details and complete the following field:
   - Role

     The default value is *ALL, which signs you in as a member of all of your roles.
5. If you want your computer to remember your settings for the future, choose Remember my sign in information.

Note

Do not use this option if other people have access to your computer.

6. Click Sign In.

   The EnterpriseOne Menu appears.

Using EnterpriseOne Menu (Stand-Alone Version)

PeopleSoft EnterpriseOne Menu is the Web-based application you run to access PeopleSoft EnterpriseOne applications. EnterpriseOne Menu requires the following software:

- EnterpriseOne, release 8.9.3
- Netscape 7 or greater or Internet Explorer 5.5 SP2 or greater

The left portion of EnterpriseOne Menu displays a tree structure that you can use to navigate to the specific application or report that you want to launch. The tree can contain objects other than applications; for this reason, all objects in the tree are called tasks. Nodes, applications (including reports), and shortcuts in the tree are all tasks. Each time you click a node, you expand the tree a level and the view of the tree changes.

Principal sets of tasks are called task views. Your system administrator configures your task view list; that is, the initial contents of the tree. The list might start or end with a special task view called Favorites. All your other task views appear above or below this one.

System administrators use PeopleSoft Solution Explorer and EnterpriseOne ERP security applications to manage user accounts and to configure EnterpriseOne Menu.

Prerequisites

- *Task View Setup* and related topics in *Solution Explorer Guide* for more information about configuring task views
- *Solution Explorer Security* in *System Administration Guide* for more information about configuring Task Explorer functions that are available to end users

► To navigate in EnterpriseOne Menu

1. In EnterpriseOne Menu, click a task (that is, a node) in the tree.

   The task node expands to show the tasks beneath it.

2. Continue to drill into the tree structure until you reach the object you want to launch.

   Hover over a non-node task to see more information about it. The system tells you what kind of object the task is (for example, application, report, and so on) and other information, such as its number and version.

   Depending on the object type, you might be able to choose a version or to set data selection or processing options. Click the triangle to the right of the object and make a choice from the resulting drop-down menu.

3. To launch the object, click it.

   You can launch multiple applications. Depending on how your system administrator has configured your system, additional applications launch in the same window or in a different window. Either way, the applications you have running appear at the top of the tree under Open Applications.

4. If you have multiple applications open, click the application name under Open Applications to bring a specific application to the forefront.

► To launch an application or report

1. In EnterpriseOne Menu, navigate to the application or report you want to launch.
2. To launch the application or report without defining processing options, version, and so forth, click the report or application.

   Applications launch immediately. If you launch a report without choosing a version, the system launches Work with Batch Versions so you can choose which version you want to run.

3. To select processing options or version for an application, click the arrow next to the task and choose Values or Versions, respectively.

   After you choose the processing options or version, the system launches the application. Depending on how your system administrator configured the system, the application launches either in the existing window or in a new one. Either way, you can run multiple applications simultaneously. All applications you have running are listed in the EnterpriseOne Menu toward the top, under Open Applications. You can switch among them by clicking the application you want in the list.

4. To select processing options or version or to designate data selection parameters for a report, click the arrow next to the task and choose one of the following options:

   - Values
   - Versions
   - Data Selection
   - Data Selection & Values

   After you set the options, the system might launch Work with Batch Versions so you can choose which version you want to run. Then, Version Prompting appears. Choose the prompting you want and click Submit to choose a printer and process the report.

Prerequisites

- *Interactive Versions for Applications* in *Foundation Guide* for more information about running PeopleSoft EnterpriseOne applications
- *Batch Versions for Reports* in *Foundation Guide* for more information about running EnterpriseOne reports
- *Processing Options* in *Foundation Guide* documentation for more information about processing options and how to use them

Fast Path

Fast Path is a field that allows you to access a specific task (that is, a folder, application, or report) directly. You use commands in Fast Path to move quickly among menus and applications. A Fast Path command can be any of the following:

- An abbreviation that is either shipped with PeopleSoft EnterpriseOne demo data or that you define to suit your business environment. For example, the code BV might access the Batch Versions application so that you can run a report.
- A task ID.
- A program name.

To use the Fast Path field, enter a Fast Path code and click the button to the right of the field.

Depending on how your system administrator configured your account, you might not be able to see or change your Fast Path security.

In EnterpriseOne Menu, you can use Fast Path codes to launch task views, PeopleSoft applications, and so on. To specify a task view, enter TV: followed by its internal task ID. For example, TV:98 accesses your Favorites task view.

You can also use the Fast Path field to access menus. Task views are composed of menus and individual tasks. Menus have no special format in EnterpriseOne Menu; they simply provide application developers with a convenient method of grouping applications. When you access a menu, you actually access a specific place in a task view. To access a menu, enter its ID. For example, G0 accesses the Foundation Systems menu. You can find a menu's ID by hovering over it.

To launch an application, enter the application's program number. To specify a form in the application, enter the application's program number followed by a |, and then enter the form ID. For example, when you enter P01012|W01012B, the system displays the Work with Addresses form in the Address Book application. You can specify a version of a form to open by adding a | and the version number after the form name; for example, P01012|W01012B|ZJDE0003.

Contact your system administrator for specific internal task, menu, and application IDs.

Note

Not all objects have Fast Path commands.

Task Documentation

Some tasks have documentation associated with them. To see the documentation, click the triangle next to the task and choose Documentation from the menu. A task might have multiple pages of documentation associated with it. If it does, two or more tabs appear at the top of the documentation frame. Click the different tabs to see all the documentation.

Note

System administrators must replicate the documentation files to every Web server to make the documentation available to all users.

See Also

- *Documenting Tasks* in *Solution Explorer Guide* for information about writing your own documentation

Favorites Task View

The Favorites task view is where you can save links to other tasks. If you frequently run a task, you can save that task in your favorites list. Then, you can access that task directly from your Favorites task view.

You have your own Favorites task view, and other users in your company have their own Favorites task views. No one else can see your Favorites task view or your changes. If you also use PeopleSoft Solution Explorer, the Windows version of Task Explorer, then you see the same favorites list in both applications, if you sign in to the same environment.

Depending on how your system administrator configured your account, you might not be able to see or change your Favorites task view.

► To access your Favorites task view

In PeopleSoft EnterpriseOne Menu, click Favorites.

► To add a task to your Favorites task view

1. In PeopleSoft EnterpriseOne Menu, navigate to the task that you want to add to your Favorites task view.
2. Click the arrow next to the task and choose Add To Favorites from the resulting menu.

Role-Based Task Views

Your system administrator can create task views that are available to users with specific roles. Roles are a way to categorize and group users. Your system administrator assigns you one or more roles when creating your account. Role-based task views can provide a convenient and succinct list of applications and reports necessary to perform a certain job.

► To access a role-based task view

In EnterpriseOne Menu, choose a role from the Roles drop-down menu and click the button to the right of the field.

The tree view changes to show the tasks that are available to the role that you chose.

Task Profiles

For each task, you can view profile information about the task itself. To display the profile for a task, click the triangle to the right of the task and choose Task Profile.

The Task Profiles window has three tabs: Basic, Intermediate, and Advanced. The information in the window varies based on the item currently selected. Some of the information on the tabs is described below:

- Version resides on the Intermediate tab.
- Object Name resides on the Intermediate tab.
- Task ID resides on the Advanced tab. If you know an object's task ID, you can launch it directly from the Fast Path toolbar.

User Options

When you click My System Options, the User Default Revisions form appears. The following list describes the associated action for each button on the User Default Revisions form:

Button	Description
User Profile Revisions	Launches the User Profile Revisions program (P0092). Only system administrators should change user profiles.
Change Password	Launches the EnterpriseOne Security program (P98OWSEC), which you use to change your password.
Submitted Reports	Launches the Work With Servers program (P986116), which you can use to review the status of a submitted report or job, change your report or job priority, work with the report output, and review errors.
View Local Output	Accesses the PrintQueue directory on the machine that is running EnterpriseOne.
Default Printer	Launches the Printer Application program (P98616). Only system administrators should change default printer settings.

See Also

- *User Profiles* in *System Administration Guide* for information about modifying user profiles
- *To View Report Output* in the *Foundation Guide* for information about accessing the PrintQueue directory
- *Submitting a Report* in *EnterpriseOne Report Writer Guide*
- *To change your password* in *EnterpriseOne Web Client Guide*
- *Working with the Printers Application* in *EnterpriseOne Report Writer Guide* for information about changing default printer settings

► To change your password

1. In PeopleSoft EnterpriseOne Menu, click User Options.
2. On User Default Revisions, click Change Password.
3. On User Password Revisions, complete the following fields and click OK:
   - Old Password
   - New Password
   - New Password - Verify

► To view report output

Before you can view the output of your reports online, you must run a report version.

1. In PeopleSoft EnterpriseOne Menu, click User Options.
2. On User Default Revisions, click View Local Output.
3. On the Open form, choose a file and click Open.

   A PDF version of the report appears. You can also view log files, such as error logs. To do so, choose UBE Log Files from the Files of Type field.

See Also

- *Submitting a Report* in the *EnterpriseOne Report Writer Guide* for information about how to run a report

EnterpriseOne Menu Configuration

As a system administrator, you must perform the following tasks to set up and maintain EnterpriseOne Menu:

- Set up Solution Explorer on a Windows workstation
- Create roles with Solution Explorer
- Create task views with Solution Explorer
- Set up security with Security Workbench

Role-based task views are one of the most powerful features of Solution Explorer and EnterpriseOne Menu. In fact, in EnterpriseOne Menu, all task views are role-based with the exception of Favorites. To set up role-based task views, you must first set up roles, and then you can create or modify task views tailored to your users' needs. You use Solution Explorer to set up roles and task views, including the Favorites task view. Refer to the Solution Explorer documentation for details about setting up roles and task views.

Security Workbench includes a form for Solution Explorer (and, therefore, EnterpriseOne Menu) security options, although only the Explorer and Favorites options affect EnterpriseOne Menu. You can allow users to view secured task views. You can apply different security configurations to roles or to individual users.

See Also

- *Solution Explorer Security* in the *System Administration Guide* for details about allowing users access to Task Explorer task views, the Favorites task view, and Fast Path
- *Setting Up User Roles* in the *System Administration Guide* for details about creating and administering roles
- *Task View Setup* in the *Solution Explorer Guide* for details about creating and modifying task views
- *Task Set Up* in the *Solution Explorer Guide* for details about creating and modifying tasks to include in task views and about applying roles to a task

Troubleshooting EnterpriseOne Menu

If you are an end user and are having problems with PeopleSoft EnterpriseOne Menu, contact your IT support professional or your system administrator.

As a system administrator, if EnterpriseOne Menu is not appearing, do the following:

- Examine the JAS.log. Ensure that all the drivers have been registered. Look for SQL (or equivalent) exceptions to track errors in database connectivity.
- Uncomment the jdelog.debug section in the jdelog.properties file and examine the JASDEBUG.log for errors in API activity.
- Examine STDOUT.log and STDERR.log. STDOUT.log in particular contains EnterpriseOne Menu-specific logging such as errors related to entry point form lookups.

Log location is determined by the JAS.ini file for STDOUT.log and STDERR.log. The JAS logging is specified in the jdelog.properties file. Both files are on the EnterpriseOne system.

Using EnterpriseOne Menu Portlet

PeopleSoft EnterpriseOne Menu Portlet runs in Collaborative Portal and allows you to access PeopleSoft EnterpriseOne applications, reports, and other features.

The left portion of EnterpriseOne Menu Portlet displays a tree structure that you can use to navigate to the specific application that you want to launch. The tree can contain other objects such as shortcuts and links, in addition to applications. For this reason, all objects in the tree are called tasks. Therefore, nodes, applications (including reports), links, and shortcuts in the tree are all tasks. Each time you click a node, you expand the tree one level and the view of the tree changes.

Principal sets of tasks are called task views. Your system administrator configures your task view list; that is, the initial contents of the tree. The list might start with a special task view called Favorites. All your other task views appear in alphabetical order below it.

System administrators use PeopleSoft Solution Explorer and EnterpriseOne ERP security applications to manage user accounts and to configure EnterpriseOne Menu Portlet.

See Also

- *Task View Setup* and related topics in the *Solution Explorer Guide* for more information about configuring task views
- *Solution Explorer Security* in the *System Administration Guide* for more information about configuring EnterpriseOne Menu functions that are available to end users

► To navigate in EnterpriseOne Menu Portlet

1. In EnterpriseOne Menu Portlet, click a task (a node) in the tree.

   The task node expands to show the tasks beneath it.

2. Continue to drill into the tree structure until you reach the object you want to launch.

   Hover over a non-node task to see more information about it. The system tells you what kind of object the task is (for example, application, report, and so on) and other information, such as its number and version.

   Depending on the object type, you might be able to choose a version or to set data selection or processing options. Click the triangle to the right of the object and make a choice from the resulting drop-down menu.

3. To launch the object, click it.

   Note

   You should only launch one application at a time.

► To launch an application or report

1. In EnterpriseOne Menu, navigate to the application or report you want to launch.
2. To launch the application or report without defining processing options, version, and so forth, click the report or application.

   Applications launch immediately. If you launch a report without choosing a version, the system launches Work with Batch Versions so you can choose which version you want to run.

3. To select processing options or version for an application, click the arrow next to the task and choose Values or Versions, respectively.

   After you choose the processing options or version, the system launches the application. Depending on how your system administrator configured the system, the application launches either in the existing window or in a new one. Either way, you can run multiple applications simultaneously. All applications you have running are listed in the EnterpriseOne Menu toward the top, under Open Applications. You can switch among them by clicking the application you want in the list.

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- Values
    - Versions
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    - Data Selection & Values

    After you set the options, the system might launch Work with Batch Versions so you can choose which version you want to run. Then, Version Prompting appears. Choose the prompting you want and click Submit to choose a printer and process the report.

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Fast Path

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- An abbreviation that is either shipped with PeopleSoft EnterpriseOne demo data or that you define to suit your business environment. For example, the code BV might access the Batch Versions application so that you can run a report.
- A task ID.
- A program name.

To use the Fast Path field, enter a Fast Path code and click the button to the right of the field.

Depending on how your system administrator configured your account, you might not be able to see or change your Fast Path security.

In EnterpriseOne Menu, you can use Fast Path codes to launch task views, PeopleSoft applications, and so on. To specify a task view, enter TV: followed by its internal task ID. For example, TV:98 accesses your Favorites task view.

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To launch an application, enter the application’s program number. To specify a form in the application, enter the application's program number followed by a |, and then enter the form

ID. For example, when you enter P01012|W01012B, the system displays the Work with Addresses form in the Address Book application. You can specify a version of a form to open by adding a | and the version number after the form name; for example, P01012|W01012B|ZJDE0003.

Contact your system administrator for specific internal task, menu, and application IDs.

Note

Not all objects have Fast Path commands.

Task Documentation

Some tasks have documentation associated with them. To see the documentation, click the triangle next to the task and choose Documentation from the menu. A task might have multiple pages of documentation associated with it. If it does, two or more tabs appear at the top of the documentation frame. Click the different tabs to see all the documentation.

Note

System administrators must replicate the documentation files to every Web server to make the documentation available to all users.

See Also

- *Documenting Tasks* in *Solution Explorer Guide* for information about writing your own documentation

Favorites Task View

The Favorites task view is where you can save links to other tasks. If you frequently run a task, you can save that task in your favorites list. Then, you can access that task directly from your Favorites task view.

You have your own Favorites task view, and other users in your company have their own Favorites task views. No one else can see your Favorites task view or your changes. If you also use PeopleSoft Solution Explorer, the Windows version of Task Explorer, then you see the same favorites list in both applications, if you sign in to the same environment.

Depending on how your system administrator configured your account, you might not be able to see or change your Favorites task view.

► **To access your Favorites task view**

In PeopleSoft EnterpriseOne Menu, click Favorites.

► To add a task to your Favorites task view

1. In PeopleSoft EnterpriseOne Menu, navigate to the task that you want to add to your Favorites task view.
2. Click the arrow next to the task and choose Add To Favorites from the resulting menu.

Role-Based Task Views

Your system administrator can create task views that are available to users with specific roles. Roles are a way to categorize and group users. Your system administrator assigns you one or more roles when creating your account. Role-based task views can provide a convenient and succinct list of applications and reports necessary to perform a certain job.

► To access a role-based task view

In EnterpriseOne Menu, choose a role from the Roles drop-down menu and click the button to the right of the field.

The tree view changes to show the tasks that are available to the role that you chose.

User Options

When you click My System Options, the User Default Revisions form appears. The following list describes the associated action for each button on the User Default Revisions form:

Button	Description
User Profile Revisions	Launches the User Profile Revisions program (P0092). Only system administrators should change user profiles.
Change Password	Launches the EnterpriseOne Security program (P98OWSEC), which you use to change your password.
Submitted Reports	Launches the Work With Servers program (P986116), which you can use to review the status of a submitted report or job, change your report or job priority, work with the report output, and review errors.
View Local Output	Accesses the PrintQueue directory on the machine that is running EnterpriseOne.
Default Printer	Launches the Printer Application program (P98616). Only system administrators should change default printer settings.

See Also

- *User Profiles* in *System Administration Guide* for information about modifying user profiles
- *To View Report Output* in the *Foundation Guide* for information about accessing the PrintQueue directory
- *Submitting a Report* in *EnterpriseOne Report Writer Guide*
- *To change your password* in *EnterpriseOne Web Client Guide*

- *Working with the Printers Application* in *EnterpriseOne Report Writer Guide* for information about changing default printer settings

► To change your password

1. In PeopleSoft EnterpriseOne Menu, click User Options.
2. On User Default Revisions, click Change Password.
3. On User Password Revisions, complete the following fields and click OK:
   - Old Password
   - New Password
   - New Password - Verify

► To view report output

Before you can view the output of your reports online, you must run a report version.

1. In PeopleSoft EnterpriseOne Menu, click User Options.
2. On User Default Revisions, click View Local Output.
3. On the Open form, choose a file and click Open.

   A PDF version of the report appears. You can also view log files, such as error logs. To do so, choose UBE Log Files from the Files of Type field.

See Also

- *Submitting a Report* in the *EnterpriseOne Report Writer Guide* for information about how to run a report

EnterpriseOne Menu Configuration

As a system administrator, you must perform the following tasks to set up and maintain EnterpriseOne Menu:

- Set up Solution Explorer on a Windows workstation
- Create roles with Solution Explorer
- Create task views with Solution Explorer
- Set up security with Security Workbench

Role-based task views are one of the most powerful features of Solution Explorer and EnterpriseOne Menu. In fact, in EnterpriseOne Menu, all task views are role-based with the exception of Favorites. To set up role-based task views, you must first set up roles, and then you can create or modify task views tailored to your users' needs. You use Solution Explorer to set up roles and task views, including the Favorites task view. Refer to the Solution Explorer documentation for details about setting up roles and task views.

Security Workbench includes a form for Solution Explorer (and, therefore, EnterpriseOne Menu) security options, although only the Explorer and Favorites options affect

EnterpriseOne Menu. You can allow users to view secured task views. You can apply different security configurations to roles or to individual users.

See Also

- *Solution Explorer Security* in the *System Administration Guide* for details about allowing users access to Task Explorer task views, the Favorites task view, and Fast Path
- *Setting Up User Roles* in the *System Administration Guide* for details about creating and administering roles
- *Task View Setup* in the *Solution Explorer Guide* for details about creating and modifying task views
- *Task Set Up* in the *Solution Explorer Guide* for details about creating and modifying tasks to include in task views and about applying roles to a task

Troubleshooting EnterpriseOne Menu Portlet

If you are an end user and are having problems with EnterpriseOne Menu Portlet, contact your IT support professional or your system administrator.

As a system administrator, if EnterpriseOne Menu Portlet is not appearing, review the following logs:

- Examine the JAS.log. Ensure that all the drivers have been registered. Look for SQL (or equivalent) exceptions to track errors in database connectivity.
- Uncomment the jdelog.debug section in the jdelog.properties file and examine the JASDEBUG.log for errors in API activity.
- Examine STDOUT.log and STDERR.log. STDOUT.log in particular contains EnterpriseOne Menu Portlet-specific logging such as errors related to entry point form lookups.
- Examine the Collaborative Portal logs (standard out, standard error, and "wps" timestamped logs).

Log location is determined by the JAS.ini file for STDOUT.log and STDERR.log. STDOUT. The JAS logging is specified in the jdelog.properties file. Both files are on the EnterpriseOne system.

The exact names of the Collaborative Portal standard out and standard error logs can vary because they are configuration options in the WebSphere Application Server. Example names of these logs are "appserver-out.log," "appserver-err.log," and "wps_2004.01.22-10.19.16.log."

Web Application Forms

You interact with EnterpriseOne applications through a series of forms. When you launch an application, its default form appears. The system displays other forms as required. Each form completely replaces the previous one, and you should use the buttons on the form to move through a series of forms instead of the back and forward buttons on your browser.

EnterpriseOne forms are composed of one or more of the following elements:

- Title bar
- Button
- Radio button/Check box
- Hyperlink
- Tab
- Field
- Detail area
- Tree control

Title Bar

The title bar appears across the top of the application. The title bar shows the name of the application on the left and contains three help buttons on the right. These buttons allow you to access application version information, online help for the form or application, and online help for individual form elements.

Buttons and Menus

Buttons reside on the both the toolbar and the title bar. Buttons might also appear in the main body of the form. When you click a button, the system performs an action such as closing a form, telling the system to process the information that you entered on the form, or launching another program.

An arrow in the lower-right corner of a button indicates that the button is a menu. When you click the button, the system displays the menu.

Usually, the system does not process the information that you have entered on a form until you click a button (such as OK or Submit).

Following is a list of the most common action buttons. Not all buttons appear on all forms.

- Select – After choosing a row in the detail area, click Select to perform an action particular to that record: open another form with more detailed information, launch a report, and so forth.
- Find – After completing one or more fields on the form with search criteria, click Find to fill in the detail area with the search results.
- Add – Click Add to add a new row to the table. Typically, a new form appears to facilitate your adding the record.
- Delete – Choose a record in the detail area to delete, and then click Delete to remove it from the table.

- Copy – Choose a record in the detail area to copy and then click Copy to create a new record based on the one that you chose.
- OK – After completing the fields on a form, click OK to process the information.
- Cancel – Click Cancel to close a form. If you click Cancel instead of another action button, such as OK or Find, the system disregards any data that you entered on the form.
- Close – Click Close to close a form. If you are on the default form for an application, clicking Close closes the application.

Following is a list of the most common menus. Not all menus appear on all forms.

- Row – This menu contains options that you can apply to a record in a detail area that you have selected.
- Form – This menu contains jumps to other forms within the application as well as form-specific options such as viewing attachments to the form.
- Tools – This menu contains options that are standard to most EnterpriseOne applications, such user options, the ability to submit jobs and reports, the ability to export the contents of a detail area to a spreadsheet, and so forth.

Field and Detail Area

You enter data in fields and detail areas, and the system can display data in fields and detail areas. A detail area looks like a table and displays information with a series of columns. Each row represents a different record. Fields, on the other hand, display only one piece of data at a time. A disabled (grayed-out) field does not allow you to change the data that it displays. Additionally, some fields have a down-pointing arrow in them. When you click the arrow, you see a range of options from which to choose.

Sometimes when you click in a field, a button appears to the right of it. The button might look like a flashlight, a calculator, or a calendar. This button is called a visual assist. If you click the visual assist, the system helps you find and enter a valid value for the field. The flashlight brings up a form on which you can search for system information. For example, when you sign in to the system, you might have several environments from which to choose. If you click the visual assist and choose an environment from the list, you do not need to worry about entering a valid environment and spelling it correctly. The calculator visual assist allows you to calculate a value and then enters the result in the field. The calendar visual assist allows you to pick a date visually from a calendar and then enters it into the field.

You might not need to enter a value in every field on a form. For example, many forms allow you to search for information, and they use the data that you enter in the fields to narrow the search. If you do not want to narrow the search based on a specific field, then enter a * in the field. A * is a wildcard character that tells the system that all values for that field are valid.

Tree Control

A tree control looks like two screens. One side displays a hierarchical structure of objects such as files, applications, and so forth. The contents of the other side change depending on the object in the hierarchy that you choose.

► To get help on a form

All help buttons appear in the upper-right corner of PeopleSoft Web forms. Hover over the buttons to see their names.

1. To see information about a form such as its ID, the application it belongs to, and the software version, click About.
2. To see general information about how to use the current application, click Help.
3. To see information about a specific field, click Item Help.

   A question mark appears next to your cursor.

4. Click in the field for information about it.

   You can click in any number of fields.

5. When finished, click Item Help again.

   The question mark next to your cursor disappears, and you can continue using the form normally.

Dragging and Dropping in Web Application Forms

A parent/child form provides the ability to rearrange items in a form using the drag-and-drop feature. For example, in the Business Unit Structure Tree View program (P0006A), you can revise an organizational structure by dragging and dropping business units into a different level of the organization.

► To drag and drop items in a Web parent/child form

1. In a parent/child form, such as the Business Unit Structure Tree View program (P0006A), click the node of the folder or item that you want to move.
2. Click the Drag button.

   The system places a cursor icon next to the node that you want to move.

3. Click the node of the folder or item in which you want to place the drag item.
4. Click the Move button.

   The system places the drag item in the destination folder.

See Also

- *Parent/Child Form* in the *Foundation Guide* for more information about the parent/child form features

Detail Areas

Many forms in EnterpriseOne software contain detail areas. Detail areas display data. Depending on the application, you might be able to add, change, or delete data in the detail area as well.

When you first launch an application with a detail area, the detail area is empty. You must perform a search to fill the detail area. To perform a search, click Find. In many cases, if you click Find without providing any search criteria, the system assumes that you want to see all of the data in the underlying business view, and it displays the first few rows. Sometimes the system does not allow you to perform a search without first specifying some criterion.

EnterpriseOne provides a variety of methods for defining search criteria. Most detail areas have a row of blank fields above the column headings. This row is called the QBE (Query By Example) row. By entering data in one or more of the fields in the QBE row before you click Find, you limit the search based on what you entered. For example, in an application that lists employee information, if you enter Abbot in the field over the Last Name column, the system returns only those employees whose last name is Abbot. You can limit searches even further by entering data for other columns. If the detail area in this example had a column for city, for instance, you could also enter a city name, and then the system would return only those employees whose last name is Abbot and who live in the indicated city.

In addition to the QBE row, many forms also include fields above the detail area. Enter data in one or more of these fields to limit the search as noted above. Additionally, some forms also include radio buttons or check boxes which can help you limit a search in a particular way. For example, if you were looking at sales orders, the form might contain a check box that allows you to exclude incomplete orders from the list.

In the QBE row and in fields, you can usually use a * as a wildcard character. To return to the initial example, if you wanted to view all employees whose last name started with the letter M, you would enter M* in the Last Name column. Furthermore, many fields include a visual assist: a flashlight, a calculator, or a calendar. Click the visual assist to help you find or calculate a valid value for the field.

In all cases, search criteria is additive. That is, if you enter search criteria in the QBE row and the fields above the detail area, and you select other options, the system returns values based on all of that criteria. If a field is inactive (grayed out), then you cannot limit the search based on it.

Depending on how your system administrator has configured it, the system might load only a few rows of data into the detail area at a time. If more data rows exist than currently appear, the system displays a row counter and up and down arrows at the top of the detail area. Use the up and down arrows to load more data or to return to a previously loaded detail area set. The counter tells you where in the list you are. For example, when you first load a detail area, the counter might say Records 1–10. When you click the down arrow, the system loads the next ten rows and the counter says: Records 11–20.

To work with a specific row in the detail area, click the radio button or check box to the left of the row. The system highlights the row in the detail area to show that you have selected it. Then click Row to view the list of options for working with that data, including viewing any attachments to the row. If the detail area uses check boxes instead of radio buttons, you can select several rows at once. However, when you select multiple rows, you might not be able to choose the same options in the Row menu as you do when you select only one row.

Some detail areas only display data. Others allow you to enter data, but with the aid of a separate form. However, smaller detail areas might allow you to enter data directly into the detail area. In this last case, you can load data into the detail area manually or by importing the contents of a Microsoft Excel spreadsheet. To do so, the range that you specify in the spreadsheet should exactly match the columns in the detail area. Most detail areas also allow you to export their contents to a Microsoft Excel or Word file as well.

Finally, you can customize how a detail area looks. You can maximize the detail area so that it takes up most of your screen. You can change a column's color, and you can apply color and formatting to a column's text. You can define which columns to display in what order, which columns to sort on, and how wide a column should be. You can create multiple detail area formats for a single form so that you can view the data in different ways.

► To export detail area contents to Microsoft Excel or Word

1. Launch an application with a detail area, and then use Find to load the detail area with records.
2. Perform one of the following tasks:
   - To export the detail area contents to Excel, click Tools and select Export To Excel.
   - To export the detail area contents to Word, click Tools and select Export To Word.
3. Using the Export Assistant, specify the range of data that you want to export by clicking the first and then the last cell in the range.

   For example, if the detail area has four columns and three rows of data, but you want to export only the first three columns and the first two rows, you click the first cell in the first row and then the third cell in the second row.

   Use the scroll bars in the detail area to bring cells into view. The system loads only a few rows at a time. Use the up and down arrows at the top of the detail area to load more rows or to return to a previously loaded row set.

   Click Reset Selection if you clicked in the wrong cell.

4. Click Continue.

   The system exports the detail area contents that you selected to the appropriate file type and displays it.

► To import a Microsoft Excel spreadsheet into a detail area

1. Launch an application with a detail area that allows you to enter data directly.
2. Click Tools and select Import from Excel.
3. On Import from Excel Assistant, click Browse and browse to the Excel spreadsheet that you want to import.
4. Complete the following fields:
   - Worksheet to import from

     Enter the name of the worksheet containing the data that you want to import.

- Starting Cell Col

  Enter the spreadsheet column letter containing the first cell in the range of data that you want to import.

- Starting Cell Row

  Enter the spreadsheet row number containing the first cell in the range of data that you want to import.

- Ending Cell Col

  Enter the spreadsheet column letter containing the last cell in the range of data that you want to import.

- Ending Cell Row

  Enter the spreadsheet row number containing the last cell in the range of data that you want to import.

5. Click Import.

   The system imports the data that you selected.

► To create a grid format

If you want to recall the default format, save the original grid format before you save a new format. Otherwise, you must remove the new format, exit the application, and then access the application again to view the default grid format.

1. Launch the application for which you want to create a new grid format and click Customize Grid.
2. On Select Grid Format, click Create.
3. Enter a name for the format in Grid Format Name.
4. Complete the rest of the options as desired, and click OK.
5. To use the grid format as the default format for pervasive devices, click the format that you created and choose Default for Mobile Device.
6. Click Close.

► To create a grid format for pervasive devices

1. Using the Web client, launch the application for which you want to create a grid format for pervasive devices.
2. Click Customize Grid and choose the format that you want to use for pervasive devices.

   If you haven't created the format, do so now. Follow the same steps for creating the format that you use for creating a Web-based format. However, keep in mind the limited space and color options offered by most pervasive devices when you decide about columns to display, column widths, column and text colors, and so forth.

3. Click Default for Mobile Device and click Close.

► To apply a grid format

On any form with a grid, choose a grid format from the drop-down list next to Customize Grid.

You must create one or more grid formats before you can apply a grid format.

► To change a grid format

1. Launch the application containing the grid format that you want to change and click Customize Grid.
2. On Select Grid Format, choose the grid format that you want to change and click Modify.
3. To change the name of the grid format, enter a new name in the Grid Format Name field.
4. Change other elements of the grid as desired and click OK.
5. Click Close.

► To delete a grid format

1. On any form with a grid, click Customize Grid.
2. On Select Grid Format, choose the grid format that you want to delete and click Delete.

   The grid format disappears from the list.

3. Click Close.

► To hide or show grid columns

1. Launch the application containing the grid that you want to change.
2. Click Customize Grid and either create a new format or select an existing one to modify.
3. On Customize Grid, scroll to the Display and Order section.
4. To prevent a column from showing on the grid, choose it in the Display and Order list, and then click the left arrow.
5. To make a column appear on the grid, choose it in the Available Columns list, and then click the right arrow.
6. Use the up and down arrows to change the order in which the system displays the columns on the grid.
7. When finished, click OK, and then click Close.

► To rearrange grid columns

1. Launch the application containing the grid that you want to change.
2. Click Customize Grid and either create a new format or select an existing one to modify.
3. On Customize Grid, scroll to the Display and Order section.

4. In the Display and Order list, click a column name and use the up and down arrows to move it up or down in the list.

   The system displays the columns in the list in the order in which they appear from top to bottom. In other words, the column at the top of the list appears first on the grid, the column second from the top appears second on the grid, and so forth.

5. Repeat step 4 for any other columns that you want to move.
6. When finished, click OK, and then click Close.

► To set grid color and font

1. Launch the application containing the grid that you want to change.
2. Click Customize Grid and either create a new format or select an existing one to modify.
3. On Customize Grid, scroll to the Display and Order section.
4. Click a column name in the Display and Order list.

   The column name appears in the Selected Column field.

5. To apply a background color to the column, click a color in the pallet under Column Color.

   The hexadecimal value for the color that you chose appears in the Column Color field.

6. To apply a color to the text in the column, click a color in the pallet under Text Color.

   The hexadecimal value for the color that you chose appears in the Text Color field.

7. To apply a font style such as bold or italics to the text in the column, click the styles that you want to apply in the Text Options list.
8. Click Update Style.

   The system updates the Selected Column field to show you how your choices will look. The system also places a plus sign next to the column name in the Display and Order list. This symbol indicates that user-defined formatting will be applied to the column.

9. Repeat steps 4–8 to apply formatting to additional columns in the grid.
10. When finished, click OK, and then click Close.

► To change grid column width

1. Launch the application containing the grid that you want to change.
2. Click Customize Grid and either create a new format or select an existing one to modify.
3. On Customize Grid, scroll to the Display and Order section.
4. Click a column name in the Display and Order list.

   The column name appears in the Selected Column field.

5. Enter a percentage value in the % Column Width field.

   This value is the percentage of the space that you want the system to allot to the column based on the width defined for the data item on which the column is based. You can enter a value between 25 and 400.

6. When finished, click OK, and then click Close.

► To change the sort sequence of a grid

1. Launch the application containing the grid that you want to change.
2. Click Customize Grid and either create a new format or select an existing one to modify.
3. On Customize Grid, scroll to the Data Sequencing section.
4. If you want to sort on a column, click the column name in the Available Columns list, and then click the right arrow.

   The system moves the column name from the Available Columns list to the Sequenced Columns list.

   A column must be included in the grid—that is, its name must appear in the Display and Order list—before you can sort on it.

5. If you do not want to sort on a column, click the column name in the Sequenced Columns list, and then click the left arrow.

   The system moves the column name from the Sequenced Columns list to the Available Columns list.

6. To rearrange the order of sort precedence, use the up and down arrows under the Sequenced Columns list to rearrange the column names.

   The system first sorts by the column at the top of the list, then by the column second from the top, and so forth.

7. To sort column values in ascending order, click the column name in the Sequenced Columns list and click Ascending.

   If you leave the Ascending box blank, the system sorts the column in descending order.

   An A appears next to the column names to be sorted in ascending order, and a D appears next to the column names to be sorted in descending order.

8. When finished, click OK, and then click Close.

Media Object Attachments

EnterpriseOne media object and imaging features allow you to attach information to a program, including information that might currently exist as a paper-based document. For example, you can use a text attachment to explain special circumstances regarding a journal entry. The media object feature allows you to attach the information to EnterpriseOne

software programs, forms and rows, and Object Librarian objects. The imaging feature, within Media Objects, provides flexibility for creating a more efficient method of information storage.

Use Media Objects to link information to programs, either to individual rows in a grid or to a form. The following list describes the types of information that you can attach to a detail area row or to a form:

Text

Media Objects provides a word processor that lets you create a text-only attachment. For example, you could use a text attachment to provide specific instructions for a form or additional information about a record.

Image

Images include files such as Windows bitmaps, GIF, and JPG files. These files might represent electronically created files as well as scanned images of paper-based documents. For an image to be available to be attached, your system administrator must first add it to an image queue.

Object Linking and Embedding (OLE)

Media objects can be files that conform to the OLE standard. OLE allows you to create links between different programs. Using these links, you can create and edit an object from one program in a different program. EnterpriseOne software provides the links that you need to attach OLE objects.

You attach OLE media objects at the base form level. Media objects attached at this level are attached to a form and not to any data that might appear on the form. You can attach media objects to a grid row or a form, but the files themselves exist in separate directories. The only file information included with the program to which the OLE links is the path to the supporting file.

You can use only OLE objects that you properly register and install as OLE objects through Windows.

Uniform Resource Locators (URL)/Files

Media objects can be links to web page URLs or other related files. When a developer attaches a URL media object to a control object on a form, the web page appears as part of the form. When a user attaches a URL to a form or Object Librarian object, the media object acts as a link to the URL. Files can reside in an image queue, or you can attach a local or networked file.

When you attach a media object to a form, the attachment might not be available if you access different data on the form. For example, if you attach a media object to a form that contains data for order number 2002, this attachment does not appear on the form that appears when you access data for order number 3003. The base form is the same for both order numbers, but the data associated with the form is specific to each order number. The order number represents the key to the location where an attachment is stored.

If attachments exist for a form, a paper clip icon appears at the right of the status bar when you open the form. For an OLE object attached at the base form level, a document icon appears at the right of the status bar.

When you first load a grid, grid rows do not indicate whether attachments exist for the corresponding records. To determine whether attachments exist for any of the records, you must search for the attachments. The system searches for attachments only on records currently loaded into the grid. When you click the Find button to refresh the records in the grid or to display new records, the form resets the attachment's view status. You must search again to display the attachments for the grid records.

You use the Media Object Viewer to examine media objects already attached to an object and to attach new media objects to it. The Media Object Viewer workspace is split into two panels. The left panel is the icon panel and the right panel is the viewer panel. Icons for any files previously attached to the record appear in the icon panel. To view an attachment, you click its icon, and the system displays its contents in the viewer panel. An object can have multiple attachments.

You can use templates to create a format for a frequently used media object. A template might include attachments of its own, such as images. For example, you can create a letterhead and a standard form for a memo. You system administrator creates templates.

See Also

- *Media Object Attachments* in the *EnterpriseOne Web Client Guide* for information on how to attach media objects in the Web client
- *Working with Templates* in the *Foundation Guide* for information about how to create text templates
- *Processing Media Objects* in the *Form Design Aid Guide* for information about how a software developer sets up a form to handle media objects
- *Media Objects and Imaging* in the *System Administration Guide* for information about how a system administrator configures EnterpriseOne software to enable media objects

► To view attachments

1. Launch an application with a grid and click Find to fill the grid with records.
2. Click the button with a magnifying glass and a paperclip on it (the button is left of the column headings).

   The system marks the rows that have attachments by displaying a paperclip on the buttons on the left of the grid.

   Each time you refresh, perform a search, or move back to view a previous record set, you must search for attachments again.
3. Click a button with a paperclip icon to view the attachments for that row.
4. On Media Object Viewer, click the object in the left column corresponding to the media object that you want to view.
5. When finished, click Cancel.

► To attach text

1. Launch an application with a detail area and click Find.
2. For the row to which you want to add an attachment, click the button left of the grid.
3. On Media Object Viewer, click Text.
4. In the viewer panel, type the desired text.

   You can use the formatting tools at the top of the viewer panel to format your text.
5. Click Back to return to the application.

► To attach text using a template

1. Launch an application with a detail area and click Find.
2. For the row to which you want to add an attachment, click the button left of the grid.
3. On Media Object Viewer, click Text.

   The system creates a new, blank text object.

4. Click Templates.
5. On Work With Media Object Templates, click Find to load the grid.
6. Find the template that you want to use and click Select.

   Media Object Viewer appears with the template contents pasted into the viewer panel.

7. In the viewer panel, type the desired text.

   You can use the formatting tools at the top of the viewer panel to format the text of your note.

8. To return to the application, click Back.

► To attach an image

1. Launch an application with a detail area and click Find.
2. For the row to which you want to add an attachment, click the button left of the grid.
3. On Media Object Viewer, click Image.
4. Choose an image queue from the drop-down list.
5. Click the image that you want to attach.

   To preview images, click Preview and then click the image.

6. Click Add.
7. To return to the application, click Back.

► To attach a URL or file

1. Launch an application with a detail area and click Find.
2. For the row to which you want to add an attachment, click the button left of the grid.
3. On Media Object Viewer, click URL/File.
4. To attach a file residing in an image queue, perform the following steps:
   a. Click Select Queue.
   b. Choose an image queue from the drop-down list.
   c. Click the file that you want to attach.

      To preview files, click Preview and then click the file.

5. To attach a file residing in another location or a URL, perform the following steps:
    a. Click Select URL/File.
    b. Enter the URL or File name and location or click Browse to browse for the file.
    c. To preview the file, click Preview URL/File.
6. Click Add.
7. To return to the application, click Back.

► To attach an OLE object

1. Launch an application with a detail area and click Find.
2. For the row to which you want to add an attachment, click the button left of the grid.
3. On Media Object Viewer, click OLE.
4. On Insert Object, to create a new object, choose an object type, and then click OK.

   Selections vary from system to system depending on what the system administrator installs on your workstation and on the network.

5. Create your object.
6. To attach an existing object, choose Create from File, locate the object on your system, and then click OK.

   Depending on whether you create an object or attach a preexisting object, the application associated with the object appears in the viewer panel to display either a blank workspace or the preexisting object.

   The menu bar displays the menus for the application from which you call the object. For example, if you select an Excel document, the menus for Excel appear on the menu bar.

7. To return to the application, click Back.

► To remove an attachment

Note

When you remove an attachment from an object, you break the connection between the object and the media object. The media object itself is not deleted as a result of your removing its attachment to an object.

1. Launch an application with a grid and click Find to fill the grid with records.
2. Click the button to the left of the column headings with a magnifying glass and a paperclip on it.

   The system marks those rows that have attachments by displaying a paperclip on the buttons on the left of the grid.

   Each time you refresh, perform another search, or move back to view a previous record set, you must search for attachments again.

3. Click a button with a paperclip icon to view the attachments for that row.
4. On Media Object Viewer, click the object in the left column corresponding to the media object that you want to delete.
5. Click Delete.

   The icon for the media object disappears.

6. When finished, click Cancel.

Designing Web Applications

This section describes how to design and produce EnterpriseOne software applications for use on a Web client with the EnterpriseOne Toolset. It provides information about similarities and differences between designing for Web clients and designing for Windows clients. It also provides valuable best-practices guidelines, tools, and techniques that will help you design more usable EnterpriseOne Web applications. This section is intended for application developers.

The guidelines in this section are suitable for EnterpriseOne employees, EnterpriseOne business partners, and EnterpriseOne clients.

See Also

- *EnterpriseOne Development Tools Guide*
- *EnterpriseOne Development Standards: Application Design Guide*
- *EnterpriseOne Collaborative Portal Guide*

User-Centered Design Guidelines

To create usable designs, you need to follow a user-centered design (UCD) technique. User-centered design means that you get early and frequent user interaction with the real user community to get feedback and input into the design of the application. Before beginning application development, you must clearly document and validate the goals and business objectives with users through conceptual and cognitive design reviews. All team members should understand who the application users are and what goals the users expect to achieve with the application.

User Analysis Checklist

- Define the users
- Define user and business goals
- Define user tasks
- Create use cases
- Perform usability evaluations

Define the Users

You must understand your audience before you can design an application that will enhance the user experience. Therefore, you must develop a user profile for each user type (end user, power user, and so forth) that you expect to use the application. You can gather information for a user profile from various sources such as Web surveys, interviews, task analyses, contextual inquiries, focus groups, and market and competitive analyses. The following questions are the key questions that you should ask:

- Who are the targeted users? (For example, B2B e-collaborative suppliers and buyers)
- What are the targeted users' job titles? (For example, e-Procurement Managers, Buyers)
- What are the targeted users' levels of expertise? (For example, novice Web users, experts in the supply chain business)
- What are their unique needs? (For example, do they need to use this application remotely, when they are mobile, and so forth)
- What types of computers do the targeted users use? (For example, desktops, handheld devices, screen resolutions and sizes, Web browsers)
- What is the targeted users' work environment like? (For example, shop floor, cubicle, office)

Define User and Business Goals

You must understand how users move from goals to tasks to actions. Some user goals might be as simple as "doing time entry quickly and accurately." The business goals might be to increase revenue or decrease the cost of providing support. Successful products are designed by understanding both user and business goals. You can define user goals through contextual inquiries, user interviews, and observations.

The following questions are the key questions that you should ask:

- What is the user's personal goal in using the applications? For example: Doing data entry as quickly as possible to meet incentive measures.
- What are the key goals for the targeted users to accomplish?
- What are the overall business goals? For example: To increase daily sales order entry.

Solutions for Different Users

In any given enterprise, only a fraction of the employees has access to the enterprise application suite. Most enterprises would like to achieve a better return on the technology investment and reap the benefits of consistent communication across the organization. However, they would like to meet these goals without equipping every desktop in the organization with a fully loaded desktop machine. Corporate intranets have achieved widespread popularity due, in part, to the low-cost, streamlined distribution of information that they provide. Outside of the constraints of traditional paper-based publishing, companies find they can dramatically improve the information flow within the organization.

However, most intranet-based information is relatively static. In contrast, information within the enterprise system tends to change with each new transaction. Companies would like to marry the ease of distribution afforded by the corporate Intranet with the real-time accuracy and processing capabilities of enterprise applications.

EnterpriseOne software allows businesses to leverage the corporate intranet to increase access to enterprise applications. Any browser-equipped device can provide a real-time window into the enterprise's information resources. Because of the low technology overhead, businesses can include more users in the information flow, thus achieving the following benefits:

- Quicker dissemination of information to a broader corporate audience
- The bringing together of disparate business operations and distributed sites
- Better communication of goals, priorities, and strategies
- Improved decision making through the increased availability of information at every organizational level

The User Spectrum

Not every user in an organization uses enterprise applications in the same way. Some need continual access and the full suite of capabilities and desktop tools afforded by a robust client environment. Others require only the ability to review statuses and enter straightforward transactions. The spectrum of needs presupposes different technology requirements throughout the enterprise, depending on the user's skills and job requirements.

User requirements from enterprise applications vary depending on their role in the organization. Analytic users leverage multiple desktop tools to interpret and package enterprise information. Action users rely on quickly available, easily accessed information.

Analytic Users

At one end of the spectrum are users who gather, analyze, repackage, and distribute information to the rest of the enterprise—the knowledge workers of the organization. These users rely on a range of desktop tools, including enterprise applications, spreadsheets, and publishing tools, to bring together the various islands of information in the organization and integrate them into a meaningful whole.

EnterpriseOne client and server modes provide these users with the OLE-based, fully integrated desktop they need to maintain the information flow within the organization. The Windows client unites the processing tools of personal productivity applications and enterprise applications, as well as their respective data resources. Action users can then integrate this information, analyze it from various departmental perspectives, and repackage it in a context relevant to multiple functional areas, for example, requirements planning, executive decision making, marketing, purchasing, and so on.

Action Users

At the other end of the spectrum are those users who review information so that they can perform a particular action. This class of users crosses organizational levels and, for example, might include order entry clerks, shop floor personnel, and executives. Action users often use the system to review order status and item availability, for example, but they do not repackage and publish information for subsequent distribution throughout the enterprise. In browser mode, EnterpriseOne software offers action users the access they need with a point-and-click interface that minimizes training. At the same time, the low-overhead client enables the business to extend access to those action users previously out of the information flow due to the cost of equipping them with a fully loaded client workstation. The enterprise can push applications out to these users over a standard TCP/IP network to any browser-equipped device. Because no EnterpriseOne code resides on the client, the business also gains the benefits of centralized software maintenance and upgrades for an entire class of users.

Enterprise Applications Considerations

Like users, enterprise applications tend to fit better with either client/server or browser mode, depending on the role that the application plays in the information flow. Applications that

provide the tools for analyzing and manipulating information from a variety of sources are well served by client/server implementations. EnterpriseOne client/server modes furnish the needed interactivity and graphical support, as well as the advantage of dedicated use of the client's processor. Specific examples include:

- Modeling and prototyping
- Budgeting and forecasting
- High-volume transactions requiring custom interfaces by transaction or customer type

Applications intended to communicate and distribute shared information and to support standard transaction entries work well in browser mode. The types of applications listed below display information to good advantage without hindering the client's resources, making them ideal candidates for EnterpriseOne browser mode:

- Information gathering and presentation applications
- Inquiry-based self-service applications
- Repetitive standard transactions applications

Even with the complementary fit between computing mode and application environment, business needs often dictate that both modes be available to adapt to real-time changes in the business. In the EnterpriseOne environment, both modes are inherent in the architecture, to be deployed when and as needed. The enterprise can use a combination of both modes, maintaining consistency in business data and processes. By offering both client/server and Web-based access to enterprise applications, EnterpriseOne software can meet the full spectrum of user needs within the enterprise.

Because client/server and browser modes exist in a single software solution, the business can implement EnterpriseOne software to match user needs or the information requirements of a given business process. With more users accessing the enterprise's information resources, the business realizes significant benefits:

Tighter integration of distributed business units	More users throughout the organization have access to a single, consistent source of information.
Streamlined processes	Traditional paper-based processes are more easily automated.
More efficient decision cycles	Decisions are not always pushed to the limited number of users who have access to enterprise applications.

Despite the differences between the two modes, enterprises are moving to combine client/server and browser solutions in a single computing solution, such as that provided with EnterpriseOne software. Where and how the enterprise deploys each mode depends on the business need and the built-in flexibility of the solution.

In considering the combined use of Internet and client/server technology in the enterprise, businesses face two fundamental challenges:

- They must identify those areas of the business best served by Web-based solutions and those areas best served by client/server solutions.

- They must implement solutions that accommodate both client/server and browser modes.

Define User Tasks

A user task analysis defines all the tasks that the users perform with the system to achieve their goals. Performing a task analysis allows you to:

- Generate ideas for new products
- Identify essential features to include in products
- Design the user interface for products that are already identified and for which the scope has been determined
- Improve the usability of products already in production

To drive a user-centered design approach rather than a function-centered design approach requires an understanding of the user's tasks and the context in which those tasks will be performed. As with goals, a user task analysis can be gathered using contextual inquiries, interviews, and observations. The following questions are the essential questions that you should ask:

- What tasks do the users need to perform using the system?
- What are the critical and important aspects of their tasks?
- In what sequence do they perform those tasks? In other words, what is the workflow of the task?
- What are their current environmental constraints and issues?
- How can their current work processes be improved by using the system?

Task Analysis Example

This example uses the E-procurement self-service application as a model for creating a task-based, user-centered design. The following is an example of the task analysis:

- The customer accesses the application to see customer alerts on changing market needs.
- The supplier responds to the alerts in a timely manner.
- The supplier receives critical data about the buyer/seller market just in time, such as data about shortages.
- The supplier searches for the specific order request.
- The supplier browses the current schedule for shipment tracking.

The example below lists all of the tasks that a user might perform in the system as a customer or a supplier.

#	Customer Task	Supplier Task
1.	Change a user profile	Change a user profile
2.	Request a new user ID or password	Request a new user ID or password

3.	Monitor daily alerts from enterprise (first)	Monitor daily alerts from enterprise
4.	View prioritized schedules and work	View prioritized requests, such as rejected orders
5.	View daily and delayed delivery schedules	Notify of daily and delayed shipment schedules
6.	Send requests for quotes to a supplier	View requests for quotes from buyers
7.	View responses from suppliers	Respond to requests for quotes from buyers
8.	Search a status of a specific order or item ordered from a supplier	Search for the status of a specific order or item for a buyer
9.	Track outstanding shipment statuses	Track deliveries
10.	Request an unfulfilled order shipment	Respond to a shipment request
11.	Review outstanding invoices to be paid	Review overdue invoices
12.	Create sales orders	View sales orders
13.	View sales order status	Respond to sales order status
14.	Review supplier inventory	Review buyer inventory

Create Use Cases

A *use case* is a method for modeling user tasks. The purpose of use-case design is to model user tasks in flowcharts to understand the navigational structure behind the Web application design. A use case describes the tasks that the user wants the system to do, such as querying the status of an existing order. A use-case approach helps define the boundaries of the system and prevents the growth of scope that can often happen without a clear model of use cases.

In the process of identifying and defining the participants and use cases, the designers define the application scope, or what can be done and what cannot be done within the application.

Use cases provide the following benefits:

- They provide an easily understood communication mechanism.
- They reduce the risk that requirements will be overlooked (when requirements are traced).
- They provide a concise summary of what the system should do at an abstract (low modification cost) level.
- The use the language of the customer.

Usability Engineering

You should design EnterpriseOne software applications using user-centered design principles. As application development progresses, you must validate and verify the designs

with the end users. Usability engineering includes conducting iterative usability evaluations of the designs during the design cycle. Incorporating user-centered design and usability engineering into the development cycle provides the following benefits:

- Increases user efficiency and performance
- Increases operational efficiencies and productivity
- Improves user experience
- Improves customer satisfaction
- Increases sales and builds customer loyalty
- Reduces the overall development costs
- Reduces training and support costs

The case study shows how and why designers changed a form after performing usability evaluations.

In response to the evaluation, designers sought to redesign the form to make it more usable. They decided to make the following changes:

- Emphasize the PeopleSoft branding
- Use graphical icons that are inoffensive to international audiences
- Incorporate more meaningful labels and headings
- Allow more user-defined layout of screen elements based on user task flow
- Reduce the amount of on-screen text by incorporating clear labels and headings
- Reduce clutter and visual noise
- Incorporate a better grouping of information

Information Architecture

You use the Form Design Aid (FDA) tool to create the presentation of most of the EnterpriseOne Web applications.

Create Wire Frames

One technique used in Web application design is the process of creating wire-frame diagrams to describe the initial Web-screen design mock-up. A wire-frame diagram provides a placeholder for your screen content and serves as a high-level architectural blueprint for the Web application. Incorporating wire frames into the development cycle helps speed up the process of creating the Web application.

Use cases allow you to::

- Conceptualize the navigational flow from one screen to another
- Identify the contents of the Web application
- Provide an overview of the Web application

- Develop a conceptual prototype of the design
- Reveal problems in how tasks are distributed over the interaction spaces
- Provide a rough overview of how complex the system will be for users (overly long chains of transitions invite review for possible consolidation and simplification)
- Serve as a powerful tool for understanding the overall organization of software
- Reveal lurking problems in the existing designs and help clarify possible solutions

Basic Design Guidelines

Observe the following guidelines to design Web applications while working within the constraints of the FDA tool:

- Organize the information based on the user's task needs. The layout must represent the user's task flow.
- Display critical and frequently used information first.
- Avoid horizontal scrolling—users dislike scrolling horizontally.
- Use subheadings to group information into sections.
- Avoid using long, wordy sentences or phrases in instructions or labels. Use action verbs and active voice to describe the actions needed. The user interface should be self-evident and require minimal instructions.

Define the Navigation

Based on use cases and wire-frame diagrams, you define the navigation model of the Web application. Currently, the EnterpriseOne navigation scheme is sequential: users can move only in one direction by closing a form and returning to the previous form. However, Web applications require greater flexibility in designing the navigation scheme because they include the Back button. If the users cannot achieve their goals in the Web application, they are likely to click the Back button on the browser to exit an application.

Basic Navigation Guidelines

The following list presents 10 guidelines for designing a successful navigation for Web applications and Web sites. Navigation should:

- Be easy to learn
- Remain consistent across the application
- Provide feedback to users
- Appear in the user's context (for example, error messages)
- Offer alternative navigations
- Be efficient for the user
- Provide clear visual messages
- Provide clear and understandable labels

- Be appropriate for the application
- Support the user's goals and behavior

Navigation Schemes

One important challenge for Web designers is how to organize information in the Web forms. The navigation scheme must provide users quick and easy access to the information they need. Depending on the purpose of your design, you should use one of the following types of navigation schemes:

- Task-based

  This navigation is based on the user's task flow. This scheme is the most effective for EnterpriseOne Web applications. The EnterpriseOne Menu is an example of a task-based navigation. Task-based navigation follows a browse path, but it should not be too deep. Users should not have to go through four to six levels of hierarchy to reach their tasks.

  EnterpriseOne Self-Service applications use a task-based navigation model. Users navigate through the Collaborative Portal to access the workspaces, where they can then access specific tasks.

- Sequential

  This navigation is based on one step at a time and is linear in structure. Use this type of navigation for a dialog-driven, tutorial style design.

- Informational

  This navigation is a nonlinear design by which users can jump and skip pages using a hypertext model and information is organized by category. The user does not have a specific path to follow and requires flexibility in browsing a variety of information. This type of navigation scheme is used in sites such as Yahoo!.

Links

If you are designing an application with an HTML appearance, such as a self-service application with a lot of customized HTML code, then you should use links as your navigation mechanism. If you are designing a Windows-based EnterpriseOne application with grids, tabs, and other EnterpriseOne controls, then it makes sense to use EnterpriseOne standard navigation schemes, such as the EnterpriseOne toolbar and menu bar.

The EnterpriseOne software menu items such as Find, Select, OK, Cancel, and Close are familiar to the end user and offer standard runtime processing. You should use these standard menu items instead of customized buttons whenever possible.

Observe the following guidelines when designing navigational links in EnterpriseOne Web applications:

- Use action verbs to describe the task; for example, View Account Information.
- Avoid making users take a different path when completing a task; for example, Browse Catalog.

- Provide a clearly marked and easy-to-see Close button to allow users to save and exit the application.
- Use hyperlinks to connect users to additional information. In an EnterpriseOne software grid, use hyperlinks instead of the two-step Select action.
- Make hyperlinks easy to understand. Avoid leaving the user guessing about what information will appear. For example, avoid providing a Travel hyperlink that displays information about travel agencies.
- Use a single word or a short phrase for links. At the most, use two to three words.
- Avoid making links for long sentences or paragraphs.
- Avoid using an underline for labels that are not links. Make sure users can distinguish between a link and other words that are only being emphasized.
- Show unvisited links in blue with an underline. An exception is the Portal navigation bar, where a color conflict might exist. In this case, use a contrasting color link. This contrasting color should be designed so that the link does not become invisible.

  Show visited links in purple with an underline.

  Show currently selected links in red where the cursor is positioned.
- Provide an email link in blue and underlined with correct email labels; for example, Email helpdesk.
- Avoid using “click here” for more information. Create the link on the most relevant word in the sentence.

Correct	Open Sales Orders
Incorrect	Open Sales Orders: Click here!

Define the Search Interface

For Web users, you must make the search function simple and fast to perform. The search function is one of the most important user interface elements for Web applications. Usability studies indicate that only 64 percent of users find what they need on the Web because of poorly designed search applications. Use the guidelines in the following topics to design searches.

Simple Search

A simple search is required for the novice user who knows what he or she is looking for. It must be easy to use. Typically, simple search functions include minimal filtering options. In J.D. Edwards Web applications, a simple search function should be provided in the Portal home page or in each workspace. Observe the following guidelines to design a simple search:

- The area to search should be clear, for example, J.D. Edwards Database or the World Wide Web.
- The search functions should be available from the home page or from the Portal.
- A simple search should not take the user to another page using a hyperlink.

- Provide a link to the Advanced Search function from Simple Search.

  Search for: 

  Advanced Search

  If the component or screen space is limited, move the words “Search for:” above the control. For example:

  Search for:

  Advanced Search

- Use the Go button label when space is limited, such as in a Portal component. Otherwise, use the Search button label.
- Map the Go button to the <Enter> key.

Advanced Search

The Advanced Search function is used to find specific information. Users can use the Advanced Search function to narrow the scope of their search by specifying one or more fields of information. Observe the following guidelines when designing an advanced search:

- For expert users, provide an advanced search option that replaces the current Query by Example (QBE) search function in EnterpriseOne software.
- Provide a hyperlink for the Advanced Search function on main forms and on the Simple Search form.
- Use the search default <contains> to replace the QBE function.
- Provide users with a way to navigate to the simple search from the Advanced Search page.
- Logically group the search criteria and clearly indicate the different options for searching.
- Allow users to refine the search on the same page that displays the results.
- Use Arial as the font for the text-entry text box because it is a narrow font and allows users to enter more characters.

Displaying Search Results

Observe the following guidelines to display search results:

- Display search results on the same page from which the search was performed.
- Allow users to refine the search further if required; add a Refresh button for a refined search.
- The title of the search results section should be clearly labeled **Results** in bold.

- The search results should be shown in batches of 10 records.
- The Search function should allow users to return to a specific section displaying.
- Provide “bread-crumb” navigation back to the visited pages or links, for example, 1 2 3 4.
- Provide <Next> and <Previous> links rather than <Forward> and <Back>.
- If no records are found, display a clearly visible *No Records found* message, for example, in the top left corner.

Search Error Recovery

Observe the following guidelines to facilitate the user’s ability to refine searches:

- Display the error message above the same form on which the user started the search so that the user can refine the search or correct the search parameters.
- Make all error messages clear, constructive, and specific.
- Allow users to begin a new search if no records are found.
- Offer the user tips to refine the search further.

Functional Differences between HTML and Windows

EnterpriseOne offers three distinct interactive client experiences:

- Microsoft Windows Full Client
- Windows Terminal Server Client
- Web Client

You can mix and match these clients in an EnterpriseOne implementation to support a full range of enterprise-wide solutions. The common component that is used by all client solutions is the EnterpriseOne software specification. Because all client solutions access the same EnterpriseOne software specifications, developers can employ the Write Once, Run Everywhere strategy for all EnterpriseOne applications and reports.

Nevertheless, a Web client functions somewhat differently than a Windows client. Anyone using the Form Design tool to produce HTML applications alone or in addition to Windows applications must understand these differences so that the same applications can be designed to function efficiently in both environments.

To create Web applications, you use the EnterpriseOne Development Toolset in the same manner as you would for Windows applications. To generate the application for the Web:

- Save the application in Form Design Aid.
- Generate the application to the Web server.

- Attach the application to a menu and designate in which mode the application should run.
- Execute the application.

Appearance Differences

The Windows client runs as a Windows application. It uses windows, frames, dialog boxes, menus, toolbars, and other GUI components provided by the windows platform.

Conversely, the Web client runs in a Web browser. It uses the common controls provided by the HTML standards implemented by the browser. These common controls appear and "feel" different than the Windows GUI components.

In the future, HTML rendering will use absolute positioning most of the time. Consequently, the system will render a control at the exact position as it is defined in Form Design Aid (FDA) and with the exact size as designed in FDA. Because the Browser and Microsoft Windows Application display fonts differently, the same font might appear bigger or smaller in one platform than in the other. It is the application developer's responsibility to ensure that a control is big enough for both Windows and Web clients.

The exception to the absolute positioning rule is the rendering of grid controls. To better use the browser's screen space, the HTML client usually renders the grid to be as wide as the form. In other words, the right boundary of the grid is stretched to the right boundary of the form. Controls to the right of the grid are rendered below the grid. Controls to the left side of the grid are rendered to the left.

PeopleSoft recommends that you do not put controls to the left or right of the grid control because the grid is usually the operation in the center of the form.

Behavior Differences

The Windows client is field-based; for example, when the user uses the Tab key to move out of a field, the data-validation routine is run immediately. The user immediately sees the associated description and the error status of the data field.

Conversely, a Web client is page-based; for example, when the user tabs out of a field, that piece of data typically is not processed immediately. The events for that field are not launched immediately, either. Rather, these events are queued. When the whole page is sent to the JAS server, all the queued events are run on the server and all the controls are processed in a fashion similar to the Windows client control processing. The process of sending the page to the server is called a post.

After the JAS server receives the page with input from the user, it processes all input in the sequence in which it was entered. During this process, the enterprise server is used to process business functions, carry out database queries, and so forth. In our example, the data validation routines will be processed and the associated description will be loaded from the enterprise server. Then the processed page is sent back to the browser. This whole process, from the post to the return to the browser, is called a round trip. At this point, the user can view the associated descriptions of all the data fields and the error status of each.

How the JAS Server Processes a Post

The Web Client runtime engine maintains virtual images of the open forms in the system. When the JAS server receives a new page posted by the browser, it first finds the correct virtual client image for that user session. Then it processes all data on the form in the order shown below. The following sequence does not necessarily include all server processing; rather, it outlines the sequence of events.

- Execute the Control is the entered event.
- If the control has changed, copy data sent from the browser into form controls of the virtual client that is running on the JAS server.
- Execute the following events if a control value has been changed:
  - Control is exited
  - Control is exited and changed inline
  - Control is exited and changed asynchronously
- Validate and format the control.
- Repeat steps **Error! Reference source not found.** through 4 for all controls that have been changed.
- Execute the following events and runtime logic if a QBE or grid cell value has been changed:
  - Column is entered
  - Column is exited
  - Column is exited and changed inline
  - Column is exited and changed asynchronously
  - The grid cell is validated and formatted
  - Row is entered
  - Row is exited
  - Row is exited and changed inline
  - Row is exited and changed asynchronously
- Repeat step 6 for all grid cells and rows that have been changed.
- Execute Button Clicked events, such as OK Button Clicked, that caused this page to be posted.

Actions That Trigger a Post and Input Processing

The following user actions will trigger the browser to post the Web server:

- Clicking a toolbar button such as OK or Cancel
- Clicking a form exit, row exit, or tools exit
- Clicking a radio button or check box that has event rules in the Selection Changed event

- Clicking a push button or bitmap
- Clicking a hyperlink such as clickable static text, a clickable grid cell, or clickable text block control
- Clicking visual assist for a text field or a grid cell
- Clicking the paper clip image of a grid row
- Changing tab pages
- Clicking the Previous/Next link for the grid
- Clicking the edit button on single line grid
- Clicking an editable grid for the first time
- Performing actions on a tree control or the tree in parent/child control such as:
    - Expanding a tree node
    - Collapsing a tree node
    - Dragging and dropping a tree node
    - Double-clicking a leaf node if it has event rules in the Double-Click Leaf Node event.
- Clicking the Tools/Refresh menu

The input processor manages input that triggers a post. These input processor events are separate from ER events; in fact, input process events do not necessarily require that ER events be attached. The input processor resolves posted inputs in a specific order, and it looks for specific cues to determine what changes occurred. The input processor processes events as it detects them; consequently, some programmatic changes to the grid can be interpreted as if the user had entered changes. The following list shows the order in which the input processor manages events, how it detects changes, and what actions it triggers:

1. If the Shortcut or Back button was clicked, the processor performs that action and exits (it performs no further processing).
2. The processor processes QBE events, if appropriate.
3. With the exception of the grid, PC events, and the tree, the processor processes the control events that the user visited or accessed. The system uses JavaScript to detect these conditions.
    - Text fields – The processor sends "entered" and "exited" events to all controls that the user visited. It also sends "changed" events to the controls that the user accessed.
    - Check box – The processor looks for a changed state and sends the "changed" event if appropriate.
    - Radio buttons – The processor sends a “clicked” event only (the control itself detects changes).
    - Combo box – The processor reviews the selection and sends an event if appropriate.

4. The processor processes grid events or parent-child events.
    - Grid events – JavaScript does not indicate where the user has visited, so it sends the entire contents of the grid. The processor compares the previous values in the grid to the current values. If any have changed, it sends a "cell edit" event to the grid. This event launches grid focus, row entered, column entered, and later column exited/change and row exited/changed events. When processed, these events occur in sequence, top-to-bottom and left-to-right. The system uses this same logic for silent posts, except that only a few rows are sent at a time.

      The processor also selects rows that the user has turned on using a check box.

    - Parent Child events – The system can send one of these mutually exclusive events for the PC control:
        - Cancel drag drop (drag was started, but next action was not drop)
        - Row selections
        - Next/Prev page
        - Expand/Collapse node
        - Drag
        - Move
        - Copy
5. Process tree events – The system can send one of the following mutually exclusive events for the tree control:
    - Row selections
    - Next/Prev page
    - Expand/Collapse node
    - Double-click node
6. Process click events – The system can send one of the following mutually exclusive events:
    - Customize Grid
    - Export/Import
    - Refresh
    - Load Form (opening from link or menu)
    - Grid Prev/Next page
    - Form/Row/Report/View Menu Exit
    - Clicked Hyper Link column on grid
    - Tab Page Clicked
    - Grid Tab Clicked
    - Grid Next Line (single line edit)
    - QBE/Cell Visual Assist

- Row double-clicked (select)
- Row Header double-clicked (MO)
- Embedded MO event
- Check attachments
- Textblock hyperlink clicked

7. Button clicked – These events include all the standard buttons.

Actions That Do Not Trigger a Post

The following events will not trigger a post automatically and, therefore, will not result in a round trip:

- Using the Tab key to move out of a text field
- Using the tab key to move out of a grid cell
- Using the tab key to move out of a QBE cell
- Selecting a tree node in a tree

Managing Round Trips

A round trip has an adverse impact on performance because it uses network resources. Too many round trips reduce the scalability and performance of the system. A round trip also has an adverse impact on user performance. When a round trip occurs, the user must wait for the server to process the page and return it to the browser. When the page does come back, it flashes on the browser. Although round trips can have a negative impact on performance, they are acceptable (even expected) when data accuracy is critical.

Because of these impacts, an important design principle for Web-based applications is to avoid unnecessary round trips. However, after carefully considering the performance impact of the post and eliminating alternative solutions, if an application still requires some events to occur immediately, you can use the following process to achieve this.

Set the event property HTML Post for the events that you want to trigger a post. This property is available for the following events:

- Using the Tab key to move out of the text editor: Control Is Exited, Control Is Exited and Changed Inline, Control Is Exited and Changed Asynch
- Using the Tab key to move out of the grid cell editor: Grid Column is Exited, Grid Column Is Exited and Changed Inline, Grid Column is Exited and Changed Asynch
- Selecting a tree node: Tree Node Is Selected, Tree Node Level Is Changed

The solution above is the recommended solution for EnterpriseOne applications.

Grid Selection

In a Windows client, the user selects a grid row by clicking the row. The client highlights the selected row in response. In a multiple-selection grid, when the user selects a different row,

the previously selected row is automatically deselected unless the user holds down the SHIFT or CTRL key.

In a Web client, a grid row is not highlighted when it is selected. For single-selection grids, the Web client shows a radio button next to each grid row. The user clicks the radio buttons to select different grid rows. For multiple-selection grids, the Web client displays a check box next to each grid row instead.

Note

The Web client does not automatically deselect the previous grid row if a new row is selected in multiple-selection grids.

Grid Row Attachments

In Windows, by default the grid row does not display the paper clip image, even if it has attachments. When the user hovers the cursor over the row header, the runtime batch program searches to see if an attachment exists for that row. If an attachment exists, the engine displays the paper clip. In a Web client, nothing is displayed for all grid rows initially, regardless of whether the row has an attachment. When the user clicks the paper clip image in the row header, the runtime batch program searches to see if an attachment exists for that row. If an attachment exists for a given row, the system displays the paper clip image.

Tab Sequence

The Web client supports tab sequences, with slight differences from the Windows client. Because the Web client is hosted within a browser, you cannot negate the browser's tabbing sequence. The browser starts tabbing in the page, but after you reach the end of the tab sequence it does not wrap back to the first control in the EnterpriseOne form. Instead, the browser makes a stop in its own URL Address box outside of the EnterpriseOne form.

Grid Functions

The Windows client supports Zoom, Maximize/Restore, Charting, and Print on the grid. These functions are unavailable in the Web client.

Type-Ahead Edit

The Web client uses the type-ahead feature provided by your browser.

Client-Only Business Functions

With one exception, client-only business functions are not supported on the Web. All business functions are mapped to the server. A client/server business function or server-only business function should not call client-only business functions.

The one exception is an NER marked client-only solely because it has a form interconnect (for example, it does not access the local hard disk or make Windows-only calls). This NER will function properly on the Web. You should keep these NERs as client-only. When these

NERs are generated, EnterpriseOne generates Java classes instead of C code for them. In this context, these types of NERs are called Interpretive NERs.

EnterpriseOne automatically uses Interpretive NERs when a client-only NER is executed on a server. Consider the following guidelines for Interpretive NERs:

- Interpretive NER can only be called from application ER or from another Interpretive NER.
- Interpretive NER should not be called from UBEs, client/server NERs, or server-only NERs.
- The NER must be designated client-only if it includes form interconnects. EnterpriseOne uses the client-only designation to determine if Interpretive NER should be used.

Multi-Line Edit and Silent Post

By default, the Web client displays only one editable grid line. You can display multiple edit lines for specific applications. This feature is recommended for high-volume data-entry applications. The multi-line edit feature is a form level feature. You can change it through Form Design.

When a form is set for multi-line edit, the EnterpriseOne run-time batch program also provides a silent post feature. As the user enters data in the grid, the first two lines that the user enters are posted automatically to the JAS server to be processed. The server processes events such as *Grid Row is Exited and Changed-Inline* and *Grid Row is Exited and Changed-Asynch*. Data calculated by the Web server is returned to the Web browser automatically. For example, the associated descriptions are updated to the first two grid lines. At the same time, the user can continue to enter data lines. This feature greatly improves the performance of data entry applications.

Note

The Row is Exited And Changed-Inline event is not processed before the user enters the next row.

Platform Compatibility

When you design Web applications, you should be aware of Web browser compatibility issues. Every browser interprets HTML tags a little differently. Table, form, link, and alignment tags work differently in each browser. Observe the following guidelines when designing your Web applications:

- Design for the appropriate Web browser version. EnterpriseOne Web applications currently run on Internet Explorer 5.5 and subsequent releases and Netscape 6.2 and subsequent releases.
- Avoid using tags supported by only one browser.
- Test designs on multiple browsers and platforms before release.

You should select the screen resolution appropriate to the needs of your target users. Most users with 15-inch monitors are using 800 x 600 screen resolution, and users with 17-inch monitors are using 1024 x 768 screen resolution. B2B users in the manufacturing and distribution industries often use 15-inch monitors with 800 x 600 screen resolution in their facilities.

If you are designing applications for Windows CE or pocket PC, you should select the 240 x 320 pixel option in the Forms Guide menu.

Designing EnterpriseOne Applications for Web Use

When using the EnterpriseOne Form Design Aid (FDA) tool to develop interactive applications targeted for the Web (HTML), you must consider several design strategies during the design and coding process. This topic discusses several of those strategies.

HTML Web applications often appear and function differently from Windows applications. The design requirements dictate how different they are and what the differences are. For example, in Employee, Customer, and Supplier Self-Service applications, one requirement was that non-EnterpriseOne users must be able to navigate between applications and forms. This requirement culminated in the removal of all menu and toolbar exits, which were considered an EnterpriseOne-specific navigation mechanism. To replace menu and toolbar exits, the design allows users to navigate between applications and forms using hyperlinks, which are commonly found in HTML-based applications.

When designing an application for use on both the Windows platform and the HTML platform, you might want to use form modes if you want them to look different. Refer to the *Development Tools Guide* for a detailed explanation of form modes.

When creating menus in EnterpriseOne to access your new applications, you can access the form in a specific form mode. If your application is Web only and if you did not use form modes in FDA, you can generate the application (HTML serialized objects) in any of these modes. However, if your Web-only application provides form interconnects to other applications that need to be processed in a specific mode, then you must design and generate your new application in that required mode. This is required because of the inheritance of execution modes when a form interconnect is processed. In other words, the mode of the child form is forced to be identical to the mode of the calling form.

Note

All forms accessed from a menu entry point must be generated in the same mode.

Just as when you are creating a Windows application, choosing the appropriate type of form to use is also an essential design consideration. Using the wrong form type causes inefficiencies during run time and user frustration. For example, if you use a form type that supports table updates (for example, headerless detail or header detail) for display-only purposes, the form will refresh (that is, a round trip to the Web server occurs) when the user clicks each grid row.

Performance is also an essential consideration in designing applications for Web use. In addition to the types of performance issues that a Windows environment presents, a Web

environment presents additional performance issues to be considered before you perform any coding. When designing applications for Web use, you need to:

- Reduce unnecessary round trips as much as you can by not using event rules with logic that requires immediate processing.
- Separate business logic from user interface logic. For example, you should use only event rules directly from your application to control the user interface on the form. However, you should create business logic components (business functions) that encapsulate business processes such as calculations, database access, and other types of business logic, and that access these components from the application. Doing so makes your application easier to maintain. Reducing the logic in the event rules also means that your application will be less processor-dependent, thus improving the performance of your application.
- Consider database access performance. *Always set up correct indexes for your tables. Use indexes as much as possible for database access.* Good design practices for three-tier architecture systems advocate separating the logic for database access into individual components (business functions) that are accessed from your application.
- Beware of designs that suppress the display of grid lines in the Grid Record is Fetched or the Write Grid Line – Before events. *If the form is suppressing most or almost all of the grid records that it fetches based on the search criterion, then you should devise a more focused search criterion to avoid having to suppress most grid records.*
- Do not turn off "Page At a Time" processing. If you need the total number of records fetched, you can achieve this by making a JDB call from business functions. "Page at a time" processing offers great performance benefits.
- Do not worry about the round trip from the Web server to the enterprise server. The link between the Web server and enterprise server is usually fast. Additionally, both servers perform smart caching.

Using Form Design Aid to Design Web Applications

Here are some tips and techniques for using the EnterpriseOne Form Design Aid (FDA) to create Web applications.

See Also

- *Generating EnterpriseOne Serialized Objects* in the *Web Server Installation Guide* for your platform for information about generating your forms after you have designed them

Designing Forms Using Multiple Modes

You can use control modes to develop an application with multiple interfaces, which reduces the need to maintain several different versions of the same application. You can create one base application and use modes to modify the application for different interfaces. You can enable or hide controls on forms for each mode. Only visibility and enable/disable properties for controls, columns, and menu exits are different for different modes. If you show hidden fields, they appear only for the current mode. All other properties are the same and are common for all modes. All fields are enabled and appear all forms.

The Windows runtime engine does not recognize control modes; only the HTML runtime engine recognizes them. Mode 1 is the default mode. You attach an application to a menu to run. This menu allows you to run an application in different modes. When you run an application over the Web, the application runs in mode 1 by default and another mode if you specify one. If you attach an application to a Windows menu, the Windows runtime engine ignores any modes that you specified and runs the application in mode 1. Use modes consistently throughout your applications. To create Web-enabled versions of your forms, you generate them in Java and HTML using eGenerator. The generator allows you to generate forms simultaneously for one or more modes.

Hiding Menu and Toolbar Exits

If you want to hide form and row exits and all other types of menu and toolbar exits (select, cancel, OK, or delete) in your application, you can do so by selecting the hidden option while you are in mode 2 or 3. If you choose the hidden option in mode 2, then the exit is hidden only in mode 2. In modes 1 and 3, the exit still appears.

► To hide menu and toolbar exits

1. In Form Design and while in mode 2 or 3, on the form with which you are working choose Menu/Toolbar Exits from the Form menu.
2. Choose the exit that you want to hide and click Select.
3. In the State group box, click Hidden, and then click OK.

   When generated in mode 2 or 3 (whichever you were in), the exit will not appear on the form.

Enabling In-Your-Face-Errors

The In-Your-Face-Errors property is a form-level property that is available only for the HTML platform. Typically, the system indicates an application error by highlighting the Errors and Warnings hyperlink in the upper right-hand area of the application. When enabled, however, the In-Your-Face-Errors property causes application errors to appear on the Web page.

► To enable In-Your-Face-Errors

1. In Form Design, do one of the following tasks:
   - Create a new form.
   - Choose an existing form and choose Form Properties from the Form menu.
2. On Form Properties, click Enable In-Your-Face-Errors Display, and then click OK.

Sizing Forms for Screen Sizes

Sometimes you want to size the form according to your target user's browser size. For example, most users of Customer Self-Service applications run in 640 x 480 screen resolutions only.

To create guides for sizing appropriately, you can choose to set the Form Guide value on the Form Properties dialog. Doing so adjusts the blue-line guide in FDA appropriately. FDA does

not enforce the size, but merely guides the designer to keep objects within the blue-line guides.

► **To size forms for screen sizes**

1. In Form Design, do one of the following tasks:
   - Create a new form.
   - Choose an existing form and choose Form Properties from the Form menu.
2. On Find/Browse Form Properties, choose the screen size that you want to use from the Form Guide drop-down menu, and then click OK.

Hiding the Grid Row Selector

The Hide Grid Row Selector property is a grid-level property that is available for the HTML platform. If you decide not to show grid row selectors on your grids, select the Hide Row Selector option on the grid properties dialog box.

► **To hide the grid row selector**

1. In Form Design, on the form with which you are working, click in the grid and then choose Item Properties from the Edit menu.
2. On Grid Properties, in the HTML Properties section, click Hide Row Selector, and then click OK.

Showing an Alternate Grid Row Format

The Use Alternate Grid Row Format property is a grid-level property that is available for the HTML platform. The property allows you to control the appearance of your grid.

To use this option, you must provide specific HTML tags by clicking the Row Format button. Follow the instructions in the HTML Alternative Grid Row Format dialog when creating your HTML tags for the grid rows. These HTML tags control the appearance of each grid row. You can also choose to output a Media Object Image or Text type object for the grid record and hyperlinks.

This option is supported only in non-updateable grids.

► **To show an alternate grid row format**

1. In Form Design, on the form with which you are working, click in the grid and then choose Item Properties from the Edit menu.
2. On Grid Properties, in the HTML Properties section, click Use Alternate Grid Row Format, and then click OK.
3. On HTML Alternative Grid Row Format, enter a character string with the HTML tags required to control the appearance of each grid row as required.
4. Click OK.
5. On Grid Properties, click OK.

Showing Multiple Currencies per Column

Note

The Support Multiple Currencies option is supported for HTML applications only.

When a column has the Support Multiple Currencies option enabled, the runtime engine assumes that each cell contains its own currency setting, and it formats each cell based on that cell's currency decimal setting. The runtime engine will not apply the currency settings to other grid rows, however. Therefore, the application needs to apply currency to each grid row individually. For example, the Amount column in row 1 might have a JPY currency type and be formatted with no decimals, while the Amount column in row 2 might have a USD currency type and be formatted with two decimals.

When a column has the Support Multiple Currencies option disabled, the runtime engine assumes that all of the cells in that column share the same currency setting, and so it applies that currency setting to other grid rows. Therefore, if you specify the currency setting in one row, the system overwrites the currency setting for all the other rows in the grid to match. This feature offers a performance benefit for those grids that contain only one currency because the application needs to specify a currency setting to one grid row only to affect the entire grid.

The following currency rules apply:

- When assigning values using conventions such as target = source, if the source object does not have any currency information (currency code = null or empty string), then the target object keeps its own currency.
- When a GB object is cleared, the currency code and currency decimal information for that column is not cleared.

► **To show multiple currencies per column**

1. In Form Design, on the form with which you are working, click in the grid and then choose Item Properties from the Edit menu.
2. On Grid Properties, click the Columns tab.
3. Choose the column for which you want to show multiple currencies and click Column Properties.
4. On Grid Column Properties, click the General tab.
5. Choose Support Multiple Currencies and click OK.
6. On Grid Properties, click OK.
7. Use event rules to set the currency type for each row during runtime.

Using Multi-Line Edit to Control Page Refresh

The Allow Multi-line Edit property is a grid-level property that is available for the HTML platform. This property is applicable only to grids that allow users to edit the grid records. Turning on this option causes the run-time batch program for HTML to show grid rows that contain Editable Text Box controls in each cell (all rows) instead of only in the active grid

row. It also prevents the system from refreshing the page every time the user exits a grid row. Instead, the system delays the processing of the Grid Row is Exited events and only processes them in groups of 3 to 5 rows using a silent post.

► To use multi-line edit to control page refresh

1. In Form Design, on the form with which you are working, click in the grid and then choose Item Properties from the Edit menu.
2. On Grid Properties, in the HTML Properties section, click Allow Multi-Line Edit, and then click OK.

Controlling the Number of Grid Rows for Each Page of Grid Records

The Grid Row Count property is a grid-level property that is available for the HTML platform. A non-zero value for this option causes the run-time batch program for HTML to show the number of grid rows specified. By default (a value of 0), the run-time batch program displays 10 records in the grid per page.

► To control the number of grid rows for each page of grid records

1. In Form Design, on the form with which you are working, click in the grid and then choose Item Properties from the Edit menu.
2. On Grid Properties, in the HTML Properties section, enter the number of grid rows that you want to appear per page in the Grid Row Count field, and then click OK.

Showing Check Boxes in Grid Cells

The Check Box property is a grid column-level property that is available for the HTML platform. It displays check boxes in grid cells for a specific column that provides on/off state information.

To use this option, you must provide specific values that specify the Checked and Un-Checked state value. During run time, the system detects the value of the GC variable for the column and cross-references the value with the settings that you specified to render a checked or unchecked check box.

► To show check boxes in grid cells

1. In Form Design, on the form with which you are working, click in the grid and then choose Item Properties from the Edit menu.
2. On Grid Properties, in the Grid Columns section, choose a grid column, and then click Grid Column Properties.
3. On Grid Column Properties, in the Display Style section, click Check Box.
4. Click Values.
5. On Grid Column CheckBox Values, enter numerical values in the Checked and Un-Checked fields, and then click OK.

   The values that you enter should correspond to the values that you set in the GC variable.

6. On Grid Column Properties, click OK.
7. On Grid Properties, click OK.

Showing Hyperlinks in Grid Cells

The Clickable property is a grid column-level property that is available for the HTML and Windows platforms. It allows you to display text in grid cells for a specific column as hyperlinks (clickable text). Any non-blank value in the grid cell for that column appears as a hyperlink.

Enter the logic to process when the hyperlink is clicked in the Grid Column Clicked event. GC values are available for the grid row that was clicked.

► To show hyperlinks in grid cells

1. In Form Design, on the form with which you are working, click in the grid and then choose Item Properties from the Edit menu.
2. On Grid Properties, in the Grid Columns section, choose a grid column and then click Grid Column Properties.
3. On Grid Column Properties, in the Attributes section, click Clickable and then click OK.

   Use the Grid Column Clicked event to define what should occur when the user clicks a hyperlink in this grid column.

4. On Grid Properties, click OK.

Showing Hyperlinks in the Form, Group Box, or Tab Control

To create hyperlinks that are placed in the form, group box, or tab control, you can use either the text block control or static text control. Usually, the text block control is used whenever more control over the text format for the hyperlink is needed; otherwise, the static text control is used due to reduced overhead.

To use a text block control to display its text contents as hyperlinks, you add a segment to hold the text of your hyperlink, and then select the Clickable option in the text block control properties dialog. The logic to process when the hyperlink is clicked should be entered in the Text Clicked event.

To use a static text control to display its text contents as hyperlinks, you assign the hyperlink text that you want to show, and then select the Clickable option in the Static Text properties dialog. The logic to process when the hyperlink is clicked should be entered in the Text Clicked event. You cannot override the font and color for clickable text segments.

► To use the text block control to show a hyperlink

1. In Form Design, on the form with which you are working, select the text box control that you want to affect, and then choose Item Properties from the Edit menu.
2. On Text Block Control Properties, click Add Segment, and enter the text that you want to use as your hyperlink.

Use the Text Clicked event to define what should occur when the user clicks this hyperlink.

3. In the Segment Information section, click Clickable, and then click OK.

► To use the static text control to show a hyperlink

1. In Form Design, on the form with which you are working, select the static text control that you want to affect, and then choose Item Properties from the Edit menu.
2. On Static Text Properties, enter the text in the Static Text field.

   Use the Text Clicked event to define what should occur when the user clicks this hyperlink.

3. In the Attributes section, click Clickable, and then click OK.

Inserting Custom HTML Tags into a Form

You might want to insert your own HTML into the form to produce a more customized HTML appearance. To do this, use Text Block Control.

The text block control can be used to extend the functionality already provided by the EnterpriseOne HTML platform. The HTML platform adds any text contained in the platform to the HTML of the form as it is generated. In addition, you can add, delete, and update the text within the control at runtime. Taken together, this control can greatly extend the functionality of the Web client.

You can enter text in the text block control either by defining text segments in the text block control in FDA or by inserting text segments at runtime via system functions.

Inserting Custom HTML with FDA

Place the Text Control Block on the form, and insert segments as needed to hold the tags. You should segregate segments that are data-driven and segments that contain static HTML tags. Segments that are data-driven can be set during the Dialog is Initialized, Grid Record is Fetched, or other appropriate events by using the Update Segment() system function call.

► To insert custom HTML with FDA

1. In Form Design, choose Text Control Block from the Insert menu.
2. Click in the form in which to place the control.
3. Click the new control, and then choose Item Properties from the Edit menu.
4. Click Add Segment and then enter the HTML text that you want to add to the form.
5. To make the segment clickable by the user, click Clickable.

   This option causes the system to generate the segment as a hyperlink that runs a Text Clicked event when the user clicks it.

6. To override the cascading style sheet (CSS) setting for the segment, perform the following steps:

   a. Turn off Use Default Font and Color.

b. Click Font and Color.

c. On Font, specify the typeface, font characteristics, and color that you want to use, and then click OK.

PeopleSoft recommends that you use this option sparingly.

7. Click OK.

Inserting Custom HTML at Run Time

You can use the following system functions to manipulate the text block control from ER:

Function	Parameters	Comments
Add Segment	Text Control Text Font Clickable (true/false) SegmentId – Returned unique segment ID for the added segment	
Get Last Clicked Segment	Text Control SegmentId – Returned segment ID of the segment that was last clicked by the user	Use this on the Text Clicked event of the text control to determine what segment was clicked.
Get Segment Information	Text Control Text – Returned text of the passed in segment ID Clickable – Returned clickable flag of the passed in segment ID SegmentId – Segment ID of the segment being inquired about	
Remove Segment	Text Control SegmentId – Segment ID of the segment to be deleted	
Update Segment	Text Control Text Font Clickable SegmentId – Segment ID of the segment to be updated	

The parameters Clickable and SegmentId expect variables of Integer data type.

Advanced Functionality

Except for applying font and color (if specified) and adding the necessary tags for processing the clickable event, the text entered into this control is added unfiltered to the HTML of the form as it is generated. Therefore, you must be familiar with the CSS (Cascading Style Sheet) scheme that EnterpriseOne uses to generate its HTML. By using the appropriate class names in the HTML tags in the text block control, you ensure that the text block control will have the same appearance as the form, and the appearance will change with the rest of the form if the customer changes the controlling CSS forms. This also means that the developer should never define the font and color of text segments unless necessary. The font and color for a text segment ignores the CSS definition of the form and, thus, will always look different from the rest of the form.

Note

The system will not format the text block control correctly in FDA because FDA currently does not communicate with the Web server to determine the correct CSS settings. To see the control correctly formatted, generate the form and then view it on the HTML platform.

The following table lists the common EnterpriseOne CSS tags:

Class Name	Apply to…	Comment
Padded	TABLE	Creates a padded table the width of the page.
Border	Generic	
NoBorder	Generic	
WideTable	Generic	Width = 100%
TallTable	Generic	Height = 100%
TallAndWideTable	Generic	Width = Height = 100%
Grid	TABLE	
MainHeading	Generic	
SectionHeading	Generic	
GroupHeading	Generic	
SubHeading	Generic	
FieldLabel	Generic	
RaisedBorders	Generic	
BlackBorders	Generic	
ClearBorders	Generic	
QBECell	Generic	
GridHeaderCell	Generic	

Class Name	Apply to…	Comment
GridCell	Generic	
InYourFaceError	Generic	
InYourFaceWarning	Generic	
ToolbarText	Generic	
GroupBox	Generic	
GroupBoxHeader	Generic	
FormLabel	Generic	
FormAboveGrid	Generic	

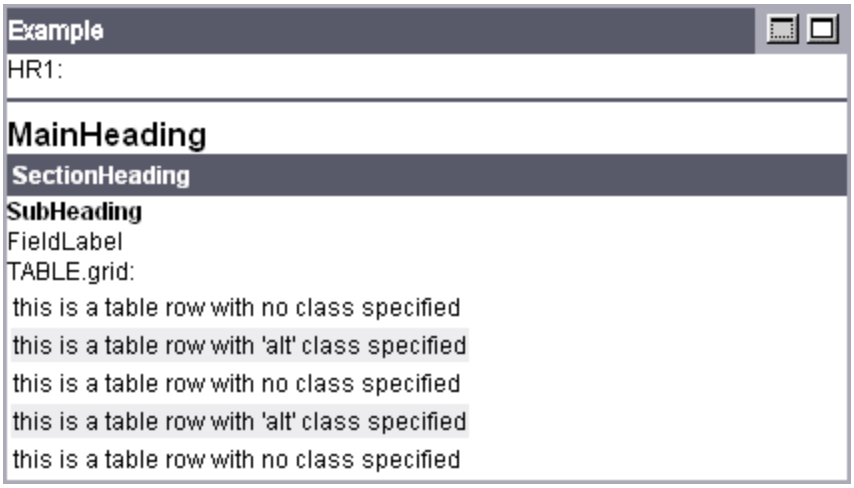
The following HTML tags have been specified with custom style tags so that they can be used with the assurance that their text will be formatted correctly:

Tag	Comment
HR1	
HR2	
BODY	Nonformatted text without any enclosing tags, classes, or both entered by the text block control will have a base style to rely on.
INPUT	
SELECT	
A	
TABLE	
TABLE TD	

The following sample HTML code produces the figure that immediately follows it:

```
Text in text block control :

<HR1>

HR1:

</HR1>

<HR class=MainHeading>

MainHeading

</HR>

<HR class=SectionHeading>

SectionHeading

</HR>
```

```
<HR class=SubHeading>
SubHeading
</HR>
<span class=FieldLabel>
SubHeading
TABLE.grid:
</span>
<TABLE class=Grid>
<TR><TD >
this is a table row with no class specified
</TD></TR>
<TR class=alt><TD >
this is a table row with no class specified
</TD></TR>
<TR><TD >
this is a table row with no class specified
</TD></TR>
<TR class=alt><TD >
this is a table row with no class specified
</TD></TR>
<TR><TD >
this is a table row with no class specified
</TD></TR>
```



Inserting Images into a Form

You can place a variety of images on a form with the Bitmap Control. The image can be static, or you can make it clickable. Use the Button Clicked event to define what should occur when the user clicks the image.

► To insert images into a form

1. In Form Design, choose Bitmap from the Insert menu.
2. Click in the form in which to place the control.
3. On Bitmap Properties, click Find to find the file that you want to use for your bitmap control.

   The Bitmap Properties form displays the bitmap that you have chosen.

4. Complete the following field:
   - Tool Tip Text

     This text, like Hover Helps, appears if the user makes the mouse pointer hover over the bitmap.

5. Click one or more of the following attributes:
   - Clickable

     If you turn on the Clickable option, a Button Clicked event is enabled for the bitmap.

   - Maintain Aspect Ratio

     If you turn on the Maintain Aspect Ratio option, the bitmap will maintain its dimensions if you resize it. This ensures that your image does not become distorted if you resize it.

Inserting Drop-Down Lists into a Form

To display drop-down lists in a form, you should place the combo box control on the form. Then, drag and drop a data dictionary item right on the combo box control. When correctly done, your Combo Box Properties dialog will state the data dictionary item to which it is connected.

The content of the drop-down list is derived from (and only from) the UDC values and descriptions with which the data dictionary item is associated. The list is based on the edit rule properties of the data dictionary item. Allowing only a UDC to complete a combo box ensures that all the combo box values can be translated correctly.

► To insert drop-down lists into a form

1. In Form Design, choose Combo Box from the Insert menu.
2. Click in the form in which to place the control.
3. From the View menu, choose Data Dictionary Browser.

4. In Data Dictionary Browser, find the data dictionary item that you want to use for the combo box control.
5. Select the combo box control, and then drag the data dictionary item from the Data Dictionary Browser and drop it directly on top of the combo box control.
6. Select the combo box control, and then choose Item Properties from the Edit menu.
7. Verify that the data dictionary item has been associated with the combo box and click OK.

Performing Custom Selects and Sorts for the Grid

Within the Button Clicked event of the Find menu exit, you can customize your grid selection criterion by using the Clear Select() system function and then performing the Set Selection() system function. You can also choose to perform Clear Sequencing() and then the Set Sequencing() system function to customize the grid sequencing settings of the grid.

By using Set Selection() or Set Sequencing() system functions, you do not have to use hidden filter fields on the form to perform custom grid-selection criteria. Furthermore, the Set Selection() function can support "Or" and "And" statements in the resulting SQL statements.

Finally, the Set Selection() system function does not depend on fields that exist in the business view of the form. Consequently, you can actually perform selects on fields that are outside of the business view, so long as they belong to the same table as the business view.

EnterpriseOne Software Events on a Web Client

Two EnterpriseOne software events do not work well in an HTML environment because of posting. PeopleSoft recommends that you do not use the Control Is Exited event to hide or show controls or to enable or disable grids. If you do use Hide/Show or Enable/Disable Grid system functions in the Control Is Exited event, the system automatically generates JavaScript to refresh the page so that the event can be processed immediately. Note that this solution causes a round trip.

The following table shows how a Web client responds to all EnterpriseOne software events, including which ones trigger a post:

Object Type	Event	Triggers Post	Delayed
Bitmap	Button Clicked	Yes	No
Checkbox	Selection Changed	No, but will trigger post if ER is present.	—
Combo Box	Control is Exited	No	Yes
ComboBox	Control is Entered	No	Yes; will run against state of form prior to post.
Document Object	Media Objects — Form def	— (Triggered on server during form initialization.)	—
Document Object	Media Objects — Row def	— (Triggered on server during Find button processing.)	—

Object Type	Event	Triggers Post	Delayed
Edit	Control Exited/Changed—Asynch	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes
Edit	Control Exited/Changed—Inline	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes
Edit	Control is Entered	No	Yes; will run against state of form prior to post.
Edit	Control is Exited	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes
Edit	Post Visual Assist Clicked	— (Triggered on server immediately after the event, Visual Assist Button Clicked, is finished.)	—
Edit	Visual Assist Button Clicked	Yes	No
Form	Add Record to DB — After	— (Triggered on server during OK button processing.)	—
Form	Add Record to DB – Before	— (Triggered on server during OK button processing.)	—
Form	Clear Screen After Add	— (Triggered on server during form initialization.)	—
Form	Clear Screen Before Add	— (Triggered on server during form initialization.)	—
Form	Dialog is Initialized	— (Triggered on server during form initialization.)	—
Form	Director Back Button Clicked	N/A (Not valid on the Web client.)	N/A
Form	Director Cancel Button Clicked	N/A (Not valid on the Web client.)	N/A
Form	Director Next Button Clicked	N/A (Not valid on the Web client.)	N/A
Form	End Dialog	— (Triggered on server during form closing.)	—
Form	Grid Record is Fetched	— (Triggered on server during Find button processing.)	—
Form	Last Grid Record Has Been Read	— (Triggered on server during Find button processing.)	—
Form	Post Commit	— (Triggered on server during Find button processing.)	—
Form	Post Dialog is Initialized	— (Triggered on server during form initialization.)	—
Form	Update Record to DB — After	— (Triggered on server during OK button processing.)	—

Object Type	Event	Triggers Post	Delayed
Form	Update Record to DB — Before	— (Triggered on server during OK button processing.)	—
Form	Write Grid Line—After	— (Triggered on server during OK button processing.)	—
Form	Write Grid Line—Before	— (Triggered on server during OK button processing.)	—
Grid	Add Grid Rec to DB — After	— (Triggered on server during OK button processing.)	—
Grid	Add Grid Rec to DB — Before	— (Triggered on server during OK button processing.)	—
Grid	Add Last Entry Row to Grid	— (Triggered on server during Find button processing.)	—
Grid	All Grid Recs Added to DB	— (Triggered on server during OK button processing.)	—
Grid	All Grid Recs Deleted from DB	— (Triggered on server during OK button processing.)	—
Grid	All Grid Recs Updated to DB	— (Triggered on server during OK button processing.)	—
Grid	Delete Grid Rec from DB—After	— (Triggered on server during OK button processing.)	—
Grid	Delete Grid Rec from DB—Before	— (Triggered on server during OK button processing.)	—
Grid	Delete Grid Rec Verify—After	— (Triggered on server during Delete button processing.)	—
Grid	Delete Grid Rec Verify—Before	— (Triggered on server during Delete button processing.)	—
Grid	Double Click on Row Header	Yes	No
Grid	Get Custom Grid Row	— (Triggered on server during Find button processing.)	—
Grid	Kill Focus on Grid	No	Yes
Grid	Row Exit & Changed — Asynch	Yes. If the grid has the flag, Allow Multi-line Edit, turned on, the post occurs in the background without refreshing the form, making it appear that the post did not happen when it actually did.	No

Object Type	Event	Triggers Post	Delayed
Grid	Row Exit & Changed – Inline	Yes. If the grid has the flag, Allow Multi-line Edit, turned on, the post occurs in the background without refreshing the form, making it appear that the post did not happen when it actually did.	No
Grid	Row is Entered	No	Yes; will run against state of form prior to post.
Grid	Row is Exited	Yes. If the grid has the flag, Allow Multi-line Edit, turned on, the post occurs in the background without refreshing the form, making it appear that the post did not happen when it actually did.	No
Grid	Set Focus on Grid	Sometimes. A post occurs if the user clicks a cell in an editable grid. The event is delayed if the user tabs into the editable grid.	Sometimes. A post occurs if the user clicks a cell in an editable grid. The event is delayed if the user tabs into the editable grid.
Grid	Update Grid Rec to DB—After	— (Triggered on server during OK button processing.)	—
Grid	Update Grid Rec to DB—Before	— (Triggered on server during OK button processing.)	—
Grid Column	Col Exited & Changed – Asynch	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes
Grid Column	Col Exited & Changed — Inline	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes
Grid Column	Col is Exited	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes
Grid Column	Grid Column Clicked	Yes	No
Grid Column	Post Visual Assist Clicked	— (Triggered on server immediately after the event, Visual Assist Button Clicked, is finished.)	—
Grid Column	Visual Assist Button Clicked	Yes	No
Hyper Item	Button Clicked	Yes	No
Hyper Item	Post Button Click — Asynch	—— (Triggered on server immediately after the hyper item's event, Button Clicked, occurs.)	—
Hyper Item	Post Button Clicked	— (Triggered on server immediately after the hyper item's event, Button Clicked, occurs.)	—

Object Type	Event	Triggers Post	Delayed
Parent/Child	Kill Focus On Control	No	Yes
Parent/Child	Set Focus on Control	No	Yes
Parent/Child	Tree — Begin Drag Operation	Yes	No
Parent/Child	Tree — Cancel Drag Drop	Yes	No
Parent/Child	Tree — Drag Over Node	Yes	No
Parent/Child	Tree — End Drag Drop Operation	Yes	No
Parent/Child	Tree Node Is Collapsing	Yes	No
Parent/Child	Tree Node Is Deleted	Yes	No
Parent/Child	Tree Node Is Expanding	Yes	No
Parent/Child	Tree Node Selection Change	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes
Parent/Child	Tree—Node Level Changed	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes
Parent/Child — Grid	All Grid Recs Deleted from DB	— (Triggered on server during OK button processing.)	—
Parent/Child — Grid	Delete Grid Rec from DB—After	— (Triggered on server during OK button processing.)	—
Parent/Child — Grid	Delete Grid Rec from DB—Before	— (Triggered on server during OK button processing.)	—
Parent/Child — Grid	Delete Grid Rec Verify—After	— (Triggered on server during Delete button processing.)	—
Parent/Child — Grid	Delete Grid Rec Verify—Before	— (Triggered on server during Delete button processing.)	—
Parent/Child — Grid	Double Click on Row Header	Yes	No
Parent/Child — Grid	Get Custom Tree Node	— (Triggered on server during Find button processing.)	—
Pushbutton	Button Clicked	Yes	No
Pushbutton	Post Button Clicked	— (Triggered on server immediately after the push button's event, Button Clicked, occurs.)	—
Radio button	Selection Changed	No, but will trigger post if ER is present.	—
Static Control	Text Clicked	Yes	No

Object Type	Event	Triggers Post	Delayed
Tab Page	Tab Page is Initialized	— (Triggered on server before the event, Tab Page is Selected, is processed, provided that the tab page is selected for the first time.)	—
Tab Page	Tab Page is Selected	Yes	No
Text Block	Text Clicked	Yes	No
Tree Control	Double Click on Leaf Node	No, but will trigger post if ER is present.	—
Tree Control	Get Custom Tree Node	— (Triggered on server during the tree control's event, Tree Node Is Expanding.)	—
Tree Control	Kill Focus On Tree	No	Yes
Tree Control	Set Focus On Tree	No	Yes
Tree Control	Tree Node Is Collapsing	Yes	No
Tree Control	Tree Node Is Deleted	Yes	No
Tree Control	Tree Node Is Expanding	Yes	No
Tree Control	Tree Node Selected	No, but will trigger post if the event flag, HTML Post, is turned on.	Yes

Designing EnterpriseOne Applications for Mobile Use

From SP15 onwards, the EnterpriseOne Web client provides full support for mobile devices based on the Windows CE platform, which is highly compatible with the Web client architecture. Currently, all of the Window CE devices have a good support for HTML through various versions of Internet Explorer (IE) browser.

EnterpriseOne Application support for mobile devices includes the following applications:

- Windows CE 3.0 devices running IE 4.x Browser

  These devices include HP Jornada 720, NEC Mobile Pro™ 790, and so forth. Version 3.0 represents the latest version of Windows CE, and the devices based on it are recommended over Windows CE 2.11 because Version 3.0 provides support for the HTML4 specification by the IE 4.x Browser. IE 4.x is the richest browser currently available on mobile devices and includes good support for DTML and JavaScript.

- Windows CE 2.11 SP1 and above running IE 3.01

  EnterpriseOne Web Client supports these devices. However, these devices are not recommended because they represent the older technology that has been superceded by Windows CE 3.0.

- Windows CE 3.0 running Pocket PC 2000

  These devices include Compaq IPAQ, HP Jornada 540, Casio Cassiopeia, and so forth. These devices also provide Web access based on the IE3.01 browser. The EnterpriseOne Web Client fully supports these devices.

The EnterpriseOne Mobile Device architecture supports all EnterpriseOne interactive applications that are run on the supported platforms. It leverages the existing architecture and requires that you make no application development changes to your applications. Currently, EnterpriseOne Mobile support is available for connected users only; that is, users who are not connected to the network via a browser are not supported. Support for the Palm Computing platform is also unavailable because of its lack of good browser support.

Mobile Device Runtime Architecture

The architecture providing support for mobile devices in the EnterpriseOne Web client is the same as the one for desktop. The output generation for the HTML4-compliant browsers remains essentially the same. However, output is generated for Windows CE browsers running IE3.01.

When the user first signs onto EnterpriseOne JAS server, a session is established between the client browser and the Web server. The session then holds information about the client platform and the browser. The system generates HTML output based on this information.

Mobile Device Design Strategies

When you develop applications for mobile devices, use the same design strategies as for regular Web-based applications. However, remember that the form factors are limiting on these devices. The form factor on Window CE 3.0 devices is limited to 640 x 480, while the form factor on Pocket PC is limited to 240 x 320. The following list presents additional design strategies to consider:

- In browser-based applications, vertical scrolling is generally more acceptable than horizontal scrolling.
- Try stacking controls top-to-bottom for the Pocket PC interface to make the applications more useful. You can limit the number of grid columns to prevent the user from scrolling too much.
- From SP16.1 forward, EnterpriseOne HTML supports grid tabs on HTML4 compliant browsers. However, grid tabs are not supported on Pocket PCs. Grid tabs support a feature called Default for Pervasive Device. You can use this feature to limit the number of grid columns displayed on Pocket PC for existing applications.

► **To use a specific grid format for mobile devices**

1. On any form in HTML showing an editable grid, click Customize Grid.
2. On Customize Grid, choose a format from the Available Formats list.
3. To make a grid format the default format for mobile devices, click Default for Pervasive Devise.
4. Click Close.

Functional Differences between HTML and Mobile Devices

Mobile devices manage errors differently than HTML. Also, the user interacts with a mobile device differently from the way he or she interacts with a Web browser displayed on a terminal.

Event Handling

The EnterpriseOne Web Client and Mobile Device manage form events similarly. However, on the Pocket PC, the Control Is Exited event is never processed for a control until the user changes the data in the associated field. In HTML 4-compliant browsers such as IE 5.x on a desktop and IE 4.x on Windows CE 3.0, JavaScript is used to keep track of all the controls that the user has used the Tab key to move out of. This information is posted to the Web server and used to run the Control Is Exited event. However, on the IE 3.01 browser on Pocket PC, the virtual client keeps a virtual image of the Form, and this image is used to compare the fields that are changed. Therefore, Control Is Exited and its associated events (such as Control is Entered, Control is Exited, and Changed) are processed only if a field is modified. The logic of your application should not depend on Control Is Exited to be processed even if a particular field is not modified.

Usability

The appearance of applications running on mobile devices is not as rich as the one on Desktop IE 5.x browser because the DHTML and JavaScript support on the browsers for these devices is limited. The following is a list of the most important differences:

- Grid scrollbar support does not exist on any mobile device.
- The Web client on a Pocket PC has limited keyboard support.
- Multi-line Grid Editing functionality does not exist on the Pocket PC. Therefore, these devices are not suitable for high-volume data entry.
- Support for Media Object RTF Editing and OLE Objects does not exist.
- No Export/Import functionality is supported on any mobile device.
- Support for text block controls is limited by the mobile device. If an application has a text block control that relies heavily on DHTML/JavaScript, it might not work correctly on Pocket PC platforms.
- Support for Viewing PDF files for submitted reports does not exist.

Multiple Application Framework

Frequently, end users need to be able to work in several applications simultaneously. If this is true of your Web client users, then you should use the EnterpriseOne Multiple Application Framework (MAF) to launch applications. MAF enables multiple, simultaneous browser sessions, and it matches runtime data to the correct application.

MAF acts as the coordinator between the calling source (such as EnterpriseOne Menu or the Collaborative Portal) and the target application. Through the use of the MAF Launcher, MAF is able to facilitate the transfer of data from the source to the target, despite language mismatches or other operational hurdles. PeopleSoft provides an MAF Launcher that already matches anchors for Portal and Task Explorer sources to Java objects containing resource bundles for EnterpriseOne application targets.

If you launch an application through MAF, the MAF facilitates the exchange of data between source and target. Additionally, if the user closes the browser containing the source, then the user can later launch a new browser containing the source from the target browser. Finally, if a user terminates a target by closing the browser, MAF removes the corresponding pointer to the source object in the queue that it maintains to link sources to targets.

To take advantage of the system, you must launch your application through MAF.

Note

Applications are referred to as components in the MAF code structure.

Implementing an MAF component

Implementing an MAF component is done by extending two abstract classes: MAFComponent and JASMAFComponentInstance. You can allow your implementation of MAFComponent to contain your implementation of the JASMAFComponentInstance as an inner class because the Component Instance will never be created outside of the context of the MAFComponent. Additionally, you can keep all of your code for a particular component in one place.

Extending the MAFComponent

The following code extends the MAFComponentObject. The example is not aware of language. (The newMAFComponent method is documented later.)

```
import com.jdedwards.base.maf.*;

import com.jdedwards.base.maf.jas.*;

import java.util.*;


public class MyMAFComponent extends MAFComponent

{
```

```
public String getId()


{
    return "JDE_MAF_EXAMPLE";
}
public String getDescription(Locale locale)
{
    //This is not language aware but is just an example
    return "MAF Example Component";
}
…
}
```

The first method is the unique ID for this component type. The second returns a description. Notice that the second method provides a locale, which can be used to provide either ISO-compatible language codes or to retrieve information from a resource bundle. If you are looking for an EnterpriseOne Language Preference, you must look up the ISO code and translate it to the EnterpriseOne language code.

Extending JASMAFComponentInstance

The following code is an implementation of the JASMAFComponentInstance class as well as the newComponentInstance method from the example above. The JASMAFComponentInstance implementation is an inner-class of the MAFComponent implementation in this example.

```
import com.jdedwards.base.maf.*;
import com.jdedwards.base.maf.jas.*;
import java.util.*;


public class MyMAFComponent extends MAFComponent
{
…
public MAFComponentInstance newMAFComponentInstance(HttpSession session,
String uniqueId, String launcher)
{
    return new MyMAFComponentInstance(uniqueId, launcher, this);
}


private class MyMAFComponentInstance extends JASMAFComponentInstance
{
public MyMAFComponentInstance(String uniqueId, String launcher, MAFComponent
component)
```

```
{
    super (uniqueId, launcher, component);

}
public String getData(HttpServletRequest req, HttpServletResponse resp)
{
    return "This is my component's data";
}
public String getDescription (Locale locale)
{
    return "My component instance: "+getUniqueId();
}
}
}
```

Registering the MAFComponent

Before an MAF Component can be used, it must be registered with the dynamic MAFComponentFactory class. Because the MAFComponent in question might be needed before the component actually is processed, you should register the component during initialization of the WebApp. The following lines of code will instantiate and register the MAFComponent above:

```
MAFComponent comp = new MyMAFComponent();
MAFComponentFactory.register(comp);
```

Obtaining and Using the MAFComponentInfo

The MAFComponentInfo must be provided to your object from the MAF launcher except during initialization and destruction of the instance. MAFComponentInfo will be on the HttpServletRequest object in the attributes. You obtain this object by using the following code:

```
MAFComponentInfo info =
request.getAttribute(MAFConstants.ATTRIB_COMPONENT_INFO);
```

Generating a MAF Close link

MAF provides a link that is used to close everything in the instance, which includes removing your component from the Open Components Map and processing the MAFComponentInstance destroy method. To generate this link, which could be a javascript, use the following code:

```
out.println("<a href=\""+info.getCloseAnchor()+"\">Close</a>");
```

If you need to add extra functionality to the close, then you should implement the destroy method.

Reconnecting with a Closed Launcher

Your component can provide a link back to its launcher based on information in the associated MAFComponentInfo object. This ability is optional and your component should search for an active link before generating the tag. The following code establishes a Launcher reconnect link:

```
out.println("<a href=\"" + info.getLauncherAnchor() + "\">Goto " +
info.getLauncherDesc(locale) + "</a>");
```

Obtaining Your Unique ID

The backbone of the MAF system is in the MAF Unique ID. For any given session, this ID will allow you to determine which instance of your component is actually being processed. You can obtain:

```
String uid = info.getUniqueId();
```

Performing a Loop-Through

MAF needs to monitor the component after it has started to facilitate external windows. You can perform this loop-through in one of two ways. The first and simplest technique is to use the wrapURL method on the MAFComponentInfo object. This technique is flexible enough to handle static links only, however. Use the wrapURL method as shown below:

```
Map params = new HashMap();

params.add("myParam", {"oh me", "oh my"});

out.println("<a href=\"" + info.wrapURL(params) + "\">my url</a>");
```

The above code generates a tag similar to the following example:

```
<a
href="http://jde.com/jde/servlet/com.jdedwards.base.maf.jas.JA
SMAFServlet?…&myParam=oh+me&myParam=oh+my">my url</a>
```

Notice that the specified parameters appear at the end of the URL in the anchor. Those parameters are sent back to your component using the getData method in your MAFComponentInstance.

The second technique is to use the getMAFLauncherParameterBean provided by the MAFComponentInfo. This technique provides the URL and parameters for the component in object form. Although you can construct a static URL with this object, its strength lies in the ability to generate links for form submissions. Consider the following code:

```
MAFLauncherParameterBean mlpb = info.getMAFLauncherParameter(new HashMap());

out.println("<FORM action=\"+launcherParamBean.getURL()+"\">");


Map m = launcherParamBean.getParameterMap();

Iterator iterator = m.keySet().iterator();

while(iterator.hasNext())

{
```

```
  String paramName = (String)iterator.next();
  String[] paramValues = (String[])m.get(paramName);
  for (int x = 0; x < paramValues.length; x++)
  {
     out.println("<INPUT type=\"hidden\" name=\""+paramName+"\"
value=\""+paramValues[x]+"\">");
  }
 }
 out.println("Name: <input type=\"text\" name=\"name\">");
 out.println("</FORM>");
```

This code generates a form with all of the parameters required by the MAF as hidden fields, as well as a Name property that the user could type.

Although more work than the wrapURL method, the getMAFLauncherParameterBean method provides increased flexibility. These parameters will be on the request when your MAFComponentInstances' getData method is accessed. MAF uses a simple parameter pass-through system to forward the proper request on to the component.

Web Client Configuration

When you set up the JAS server, you performed most of the configuration work that you need to do for the Web client. See your JAS documentation for information about settings for .ini files and for performance tuning your system.

Additionally, you have several choices about how you configure system signin. If you are also using the Collaborative Portal, any signin configuration you do will affect both systems.

Configuring Signin

After establishing access to the system and its features with Security Workbench, users with access rights signin using their EnterpriseOne ID and password. You can define the language to use for the signin forms (assuming translated versions of the forms exist). In the JAS.ini file, in the OWWEB section, set InitialLanguageCode to the ISO code representing the initial language you want to use. This setting overrides any local language preferences until the user is signed in.

You can make use of cookies to allow a local workstation to record the details of a user's signin (including password). Doing so streamlines the signin process for the user. You can also create an anonymous user account to allow users to signin anonymously.

If desired, you can configure the system so that instead of using the standard signin feature, you can use a simplified basic authentication procedure instead.

In addition to indicating when a user's password has expired, the system can notify users of an impending expiration, depending on the user's signin method. A user can elect to change his or her password at the time of notification or can ignore the warning. If the user changes his or her password at the time of notification, then the system signs the user out and back in again with the new password.

The following signin methods do not support password condition notification:

- Anonymous
- Parameter-based
- Direct (via cookie)

Notification of impending password expiration occurs automatically by default. If you want to suppress this notification, set the JAS.ini parameter, DisablePasswordAboutToExpire (in the [LOGIN] section), to TRUE.

Anonymous Users

EnterpriseOne accepts an anonymous user signin if the JAS server running the system instance has been configured to accept it and if the local JAS.ini file has been configured properly. You establish access rights to workspaces and components for the anonymous signin as a separate user. The anonymous user is not a part of the *PUBLIC group. If you choose to establish an anonymous user, you must explicitly grant it access to system objects.

An instance that has been configured to accept anonymous users behaves differently from a regular instance. When a user browses to it, the system displays the initial Welcome form instead of requiring a signin. The user can view objects to which the anonymous user account has been granted access. The user cannot perform any command actions such as changing user options, although if the user has an account, the user can choose to sign in normally. After signing in, the user has access to all objects and command functions to which his or her account is entitled.

The anonymous user account is a valid account, and a user can use it to sign in to the system in the same way that a user can sign in using a regular account. You can grant the anonymous user account access to command functions and other features just as you can a normal account. A user who signs in using the anonymous account can then access the command actions and features you granted the account.

► To configure an instance of the system on the JAS server to accept an anonymous user signin

1. Create a specific, unique user account in EnterpriseOne to be used as the anonymous user account.
2. Add the settings to the command line parameters appropriate to your environment:
   - For the JVM for Tomcat/WebSphere 3.5, add these settings:
     - Danon.user.ouid=*USR12345*

       where *USR12345* is a specific, unique user ID that you set up expressly to be the anonymous user account
     - Danon.user.pwd=*PASS12345*

       where *PASS12345* is the password that you want to use for the anonymous user account
     - Danon.user.env=*ENV12345*

       where *ENV12345* is the instance of the system for which you want to allow anonymous signins

     If you are using Tomcat, add these parameters to Project|Project Properties|Run|VM Parameters.
   - For WebSphere 4.0, add the following runtime variables for the Web server:

Name	Value
anon.user.ouid	A specific, unique user ID that you set up expressly to be the anonymous user account.
anon.user.pwd	The password that you want to use for the anonymous user account.
anon.user.env	The instance of the system for which you want to allow anonymous signins.

3. Update the command line arguments as appropriate to your environment:
   a. If you are using WebSphere 3.5, use the WebSphere Administrative Console and go to the Application Server menu level to update the Command Line Arguments under the General tab as follows:

```
-Danon.user.ouid=[USR] -Danon.user.pwd=[PWD] -
Danon.user.env=[ENV]
```

b. If you are using WebSphere 4, complete these steps:

i. Navigate to the JVM Settings tab of the Application Server.

ii. Add the `anon.user.ouid`, `anon.user.pwd` and `anon.user.env` entries with their respective values in the System Properties section.

iii. Click Add, and then click Apply.

The system updates the command line arguments.

4. Add the following line to the [OWWEB] section of the JAS.ini file:

```
AnonAccess=true
```

5. To create a hyperlink that allows the user to launch a regular Collaborative Portal signin process, add the following line to the [PORTALCONFIGURATION] section of the JAS.ini file:

```
ShowSignin=TRUE
```

When you enable this feature, the signin hyperlink appears on the Workspace Navigation Bar. A user signging in anonymously can use it to launch the regular Collaborative Portal signin process. In this way, a user with a Portal account who signs in anonymously can then sign in as a regular user.

6. Restart the application server instance on the server for the changes to take effect.

Direct Signin

You can use cookies to record a user's user name, environment, role, language, and even password to streamline the signin process the next time the user signs in.

To configure the system to record user name, environment, role, and language (but not password), add or edit the following line in the JAS.ini file in the SECURITY section:

```
UseLogonCookie=TRUE
```

If the user signs in before the cookie expires, he or she is prompted only for a password.

To configure the system to record all user-related information, including password, add or edit the following line in the JAS.ini file in the SECURITY section:

```
UseLogonCookie=DIRECT
```

If the user signs in before the cookie expires, the signin process is transparent to the user, and the system appears to launch directly. With this setting, a standard encryption key is used when the system records the password. However, you can use your own encryption key when writing passwords. To set an encryption key, add or edit the following line in the JAS.ini file in the LOGIN section:

```
PassKey=[alphanumeric key]
```

You can also set cookie expiration time. When the cookie expires, its information is deleted. If a user signs in after his or cookie has expired, the user must provide signin information again. To set cookie expiration time, add or edit the following line in the JAS.ini file in the SECURITY section:

```
CookieLifeTime=[time in days]
```

Basic Authentication

You can configure the system to use a generic Web signin process instead of the default signin process. Although basic authentication streamlines the signin process, the user cannot specify role or environment. Consequently, when enabled, all users sign in to the default environment with the default role.

Typically, basic authentication is used by third-party products to sign in to the Collaborative Portal. For a third-party product to use basic authentication, the product must submit a basic authentication header to the Portal.

To enable basic authentication, add or edit the following lines to the specified sections of the server's JAS.ini file:

Section	Setting
SECURITY	SSOEnabled=TRUE
OWWEB	DefaultEnvironment=[an environment]
OWWEB	DefaultRole=[a role]

EnterpriseOne PeopleBooks Glossary

“as of” processing	A process that is run at a specific point in time to summarize item transactions.
52 period accounting	A method of accounting that uses each week as a separate accounting period.
account site	In the invoice process, the address to which invoices are mailed. Invoices can go to a different location or account site from the statement.
active window	The window that contains the document or display that will be affected by current cursor movements, commands, and data entry in environments that are capable of displaying multiple on-screen windows.
ActiveX	A technology and set of programming tools developed by Microsoft Corporation that enable software components written in different languages to interact with each another in a network environment or on a web page. The technology, based on object linking and embedding, enables Java applet-style functionality for Web browsers as well as other applications (Java is limited to Web browsers at this time). The ActiveX equivalent of a Java applet is an ActiveX control. These controls bring computational, communications, and data manipulation power to programs that can “contain” them—for example, certain Web browsers, Microsoft Office programs, and anything developed with Visual Basic or Visual C++.
activity	In Advanced Cost Accounting, an aggregation of actions performed within an organization that is used in activity-based costing.
activity driver	A measure of the frequency and intensity of the demands that are placed on activities by cost objects. An activity driver is used to assign costs to cost objects. It represents a line item on the bill of activities for a product or customer. An example is the number of part numbers, which is used to measure the consumption of material-related activities by each product, material type, or component. The number of customer orders measures the consumption of order-entry activities by each customer. Sometimes an activity driver is used as an indicator of the output of an activity, such as the number of purchase orders that are prepared by the purchasing activity. See also cost object.
activity rule	The criteria by which an object progresses from a given point to the next in a flow.
actual cost	Actual costing uses predetermined cost components, but the costs are accumulated at the time that they occur throughout the production process.
adapter	A component that connects two devices or systems, physically or electronically, and enables them to work together.
add mode	The condition of a form where a user can enter data into it.
advanced interactive executive	An open IBM operating system that is based on UNIX.
agent	A program that searches through archives or other repositories of information on a topic that is specified by the user.

aging	A classification of accounts by the time elapsed since the billing date or due date. Aging is divided into schedules or accounting periods, such as 0-30 days, 31-60 days, and so on.
aging schedule	A schedule that is used to determine whether a payment is delinquent and the number of days which the payment is delinquent.
allegato IVA clienti	In Italy, the term for the A/R Annual VAT report.
allegato IVA fornitori	In Italy, the term for the A/P Annual VAT report.
application layer	The seventh layer of the Open Systems Interconnection Reference Model, which defines standards for interaction at the user or application program level.
application programming interface (API)	A set of routines that is used by an application program to direct the performance of procedures by the computer's operating system.
AS/400 Common	A data source that resides on an AS/400 and holds data that is common to the co-existent library, allowing PeopleSoft EnterpriseOne to share information with PeopleSoft World.
assembly inclusion rule	A logic statement that specifies the conditions for using a part, adjusting the price or cost, performing a calculation, or using a routing operation for configured items.
audit trail	The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records and usually concludes with a report.
automatic return	A feature that allows a user to move to the next entry line in a detail area or to the first cell in the next row in several applications.
availability	The expression of the inventory amount that can be used for sales orders or manufacturing orders.
available inventory	The quantity of product that can be promised for sale or transfer at a particular time, considering current on-hand quantities, replenishments in process, and anticipated demand.
back office	The set of enterprise software applications that supports the internal business functions of a company.
backhaul	The return trip of a vehicle after delivering a load to a specified destination. The vehicle can be empty or the backhaul can produce less revenue than the original trip. For example, the state of Florida is considered a backhaul for many other states—that is, many trucking companies ship products into the state of Florida, but most of them cannot fill a load coming out of Florida or they charge less. Hence, trucks coming out of Florida are either empty or produce less revenue than the original trip.
balance forward	The cumulative total of inventory transactions that is used in the Running Balance program. The system does not store this total. You must run this program each time that you want to review the cumulative inventory transactions total.
balance forward receipt application method	A receipt application method in which the receipt is applied to the oldest or newest invoices in chronological order according to the net due date.

bank tape (lock box) processing	The receipt of payments directly from a customer's bank via customer tapes for automatic receipt application.
base location	[In package management] The topmost location that is displayed when a user launches the Machine Identification application.
basket discount	A reduction in price that applies to a group or "basket" of products within a sales order.
basket repricing	A rule that specifies how to calculate and display discounts for a group of products on a sales order. The system can calculate and display the discount as a separate sales order detail line, or it can discount the price of each item on a line-by-line basis within the sales order.
batch job	A job submitted to a system and processed as a single unit with no user interaction.
batch override	An instruction that causes a batch process to produce output other than what it normally would produce for the current execution only.
batch process	A type of process that runs to completion without user intervention after it has been started.
batch program	A program that executes without interacting with the user.
batch version	A version of a report or application that includes a set of user-defined specifications, which control how a batch process runs.
batch/lot tracking	The act of identifying where a component from a specific lot is used in the production of goods.
batch/mix	A manufacturing process that primarily schedules short production runs of products.
batch-of-one processing	A transaction method that allows a client application to perform work on a client workstation, and then submit the work all at once to a server application for further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect, store-and-forward.
binary large object (BLOB)	A collection of binary data stored as a single entity in a [file].
binder clip	See paper clip.
black products	Products that are derived from the low or heavy end of the distillation process—for example, diesel oils and fuel oils. See also white products.
blend note	Document that authorizes a blending activity, and describes both the ingredients for the blend and the blending steps that occur.
blend off	Reworking off-specification material by introducing a small percentage back into another run of the same product.
blind execution	The mode of execution of a program that does not require the user to review or change the processing options set for the program, and does not require user intervention after the program has been launched.

boleto	In Brazil, the document requesting payment by a supplier or a bank on behalf of a supplier.
bolla doganale	VAT-Only Vouchers for Customs. In Italy, a document issued by the customs authority to charge VAT and duties on extra-EU purchasing.
bookmark	A shortcut to a location in a document or a specific place in an application or application suite.
bordero & cheque	In Brazil, bank payment reports.
broker	A program that acts as an intermediary between clients and servers to coordinate and manage requests.
BTL91	In the Netherlands, the ABN/AMRO electronic banking file format that enables batches with foreign automatic payment instructions to be delivered.
budgeted volume	A statement of planned volumes (capacity utilization) upon which budgets for the period have been set.
bunkering	A rate per ton or a sum of money that is charged for placing fuel on board; can also mean the operation itself.
business function	An encapsulated set of business rules and logic that can normally be re-used by multiple applications. Business functions can execute a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the APIs that allow them to be called from a form, a database trigger, or a non-EnterpriseOne application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.
business function event rule	Encapsulated, reusable business logic that is created by using through event rules rather than C programming. Contrast with embedded event rule. See also event rule.
business object library	[In interoperability] The repository that stores EnterpriseOne business objects, which consist of Java or CORBA objects.
business unit	A financial entity that is used to track the costs, revenue, or both, of an organization. A business unit can also be defined as a branch/plant in which distribution and manufacturing activities occur. Additionally, in manufacturing setup, work centers and production lines must be defined as business units; but these business unit types do not have profit/loss capability.
business view	Used by EnterpriseOne applications to access data from database tables. A business view is a means for selecting specific columns from one or more tables with data that will be used in an application or report. It does not select specific rows and does not contain any physical data. It is strictly a view through which data can be handled.
business view design aid (BDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing business views. The tool uses a graphical user interface.

buy-back crude	In foreign producing oil countries, that portion of the host government's share of "participation crude" which it permits the company holding a concession to "buy back."
CAB	In Italy, the bank branch code or branch ID. A five-digit number that identifies any agency of a specific bank company in Italy.
cadastro de pessoas físicas	Cadastro de pessoas físicas. In Brazil, the federal tax ID for a person.
category code	A code that identifies a collection of objects sharing at least one common attribute.
central object	A software component that resides on a central server.
central objects merge	A process that blends a customer's modifications with the objects in a current release with objects in a new release.
central server	A computer that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers.
certificate input	See direct input.
certificate of analysis (COA)	A document that is a record of all of the testing which has been performed against an item, lot, or both, plus the test results for that item and lot.
change management	[In software development] A process that aids in controlling and tracking the evolution of software components.
change order	In PeopleSoft, an addendum to the original purchase order that reflects changes in quantities, dates, or specifications in subcontract-based purchasing. A change order is typically accompanied by a formal notification.
chargeback	A receipt application method that generates an invoice for a disputed amount or for the difference of an unpaid receipt.
chart	EnterpriseOne term for tables of information that appear on forms in the software. See forms.
check-in location	The directory structure location for the package and its set of replicated objects. This location is usually \\deploymentserver\release\path_code\ package\packagename. The subdirectories under this path are where the central C components (source, include, object, library, and DLL file) for business functions are stored.
checksum value	A computed value that depends on the contents of a block of data, and that is transmitted or stored with the data to detect whether errors have occurred in the transmission or storage.
class	[In object-oriented programming] A category of objects that share the same characteristics.
clean cargo	Term that refers to cargoes of gasoline and other refined products. See also dirty cargo.
client access	The ability to access data on a server from a client machine.
client machine	Any machine that is connected to a network and that exchanges data with a server.

client workstation	A network computer that runs user application software and is able to request data from a server.
ClieOp03	In the Netherlands, the euro-compliant uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
ClieOp2	In the Netherlands, the uniform electronic banking file format that enables batches with domestic automatic direct debit instructions and batches with domestic payment instructions to be delivered.
cluster	Two or more computers that are grouped together in such a way that they behave like a single computer.
co-existence	A condition where two or more applications or application suites access one or more of the same database tables within the same enterprise.
cold test	The temperature at which oil becomes solid. Generally considered to be 5 degrees F lower than the pour point.
commitment	The number of items that are reserved to fill demand.
common object request broker architecture	An object request broker standard that is endorsed by the Object Management Group.
compa-ratio	An employee's salary divided by the midpoint amount for the employee's pay grade.
component changeout	See component swap.
component object model (COM)	A specification developed by Microsoft for building software components that can be assembled into programs or add functionality to existing programs running on Microsoft Windows platforms. COM components can be written in a variety of languages, although most are written in C++, and can be unplugged from a program at runtime without having to recompile the program.
component swap	In Equipment/Plant Management, the substitution of an operable component for one that requires maintenance. Typically, you swap components to minimize equipment downtime while servicing one of the components. A component swap can also mean the substitution of one parent or component item for another in its associated bill of material.
conference room pilot environment	An EnterpriseOne environment that is used as a staging environment for production data, which includes constants and masters tables such as company constants, fiscal date patterns, and item master. Use this environment along with the test environment to verify that your configuration works before you release changes to end-users.
configurable network computing (CNC)	An application architecture that allows interactive and batch applications that are composed of a single code base to run across a TCP/IP network of multiple server platforms and SQL databases. The applications consist of re-usable business functions and associated data that can be configured across the network dynamically. The overall objective for businesses is to provide a future-proof environment that enables them to change organizational structures, business processes, and technologies independently of each other.

configurable processing engine	Handles all "batch" processes, including reporting, Electronic Data Exchange (EDIt) transactions, and data duplication and transformation (for data warehousing). This ability does not mean that it exists only on the server; it can be configured to run on desktop machines (Windows 95 and NT Workstation) as well.
configuration management	A rules-based method of ordering assemble-to-order or make-to-order products in which characteristics of the product are defined as part of the Sales Order Entry process. Characteristics are edited by using Boolean logic, and then translated into the components and routing steps that are required to produce the product. The resulting configuration is also priced and costed, based on the defined characteristics.
configured item segment	A characteristic of a configured item that is defined during sales order entry. For example, a customer might specify a type of computer hard drive by stating the number of megabytes of the hard drive, rather than a part number.
consuming location	The point in the manufacturing routing where a component or subassembly is used in the production process. In kanban processing, the location where the kanban container materials are used in the manufacturing process and the kanban is checked out for replenishment.
contra/clearing account	A G/L account used by the system to offset (balance) journal entries. For example, you can use a contra/clearing account to balance the entries created by allocations.
contribution to profit	Selling price of an item minus its variable costs.
control table	A table that controls the program flow or plays a major part in program control.
control table workbench	During the Installation Workbench process, Control Table Workbench runs the batch applications for the planned merges that update the data dictionary, user defined codes, menus, and user overrides tables.
control tables merge	A process that blends a customer's modifications to the control tables with the data that accompanies a new release.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
corrective work order	A work order that is used to formally request unscheduled maintenance and communicate all of the details pertaining to the requested maintenance task.
cost assignment	Allocating resources to activities or cost objects.
cost component	An element of an item's cost—for example, material, labor, or overhead.
cost object	Any customer, product, service, contract, project, or other work unit for which you need a separate cost measurement.
cost rollup	A simulated scenario in which work center rates, material costs, and labor costs are used to determine the total cost of an item.
costing elements	The individual classes of added value or conversion costs. These elements are typically materials, such as raw and packaging; labor and machine costs; and overhead, such as fixed and variable. Each corporation defines the necessary detail of product costs by defining and tracking cost categories and subcategories.

credit memo	A negative amount that is used to correct a customer's statement when he or she is overcharged.
credit notice	The physical document that is used to communicate the circumstances and value of a credit order.
credit order	A credit order is used to reflect products or equipment that is received or returned so that it can be viewed as a sales order with negative amounts. Credit orders usually add the product back into inventory. This process is linked with delivery confirmation.
cross segment edit	A logic statement that establishes the relationship between configured item segments. Cross segment edits are used to prevent ordering of configurations that cannot be produced.
crude oil assay	A procedure for determining the distillation curve and quality characteristics of a crude oil.
cumulative update	A version of software that includes fixes and enhancements that have been made since the last release or update.
currency relationships	When converting amounts from one currency to another, the currency relationship defines the from currency and the to currency in PeopleSoft software. For example, to convert amounts from German marks to the euro, you first define a currency relationship between those two currencies.
currency restatement	The process of converting amounts from one currency into another currency, generally for reporting purposes. It can be used, for example, when many currencies must be restated into a single currency for consolidated reporting.
current cost	The cost that is associated with an item at the time a parts list and routing are attached to a work order or rate schedule. Current cost is based on the latest bill of material and routing for the item.
customer pricing rules	In Procurement, the inventory pricing rules that are assigned to a supplier. In Sales, inventory pricing rules that are assigned to a customer.
D.A.S. 2 Reporting (DAS 2 or DADS 1)	In France, the name of the official form on which a business must declare fees and other forms of remuneration that were paid during the fiscal year.
data dictionary	A dynamic repository that is used for storing and managing a specific set of data item definitions and specifications.
data source workbench	During the Installation Workbench process, Data Source Workbench copies all of the data sources that are defined in the installation plan from the Data Source Master and Table and Data Source Sizing tables in the Planner data source to the System - release number data source. It also updates the Data Source Plan detail record to reflect completion.
data structure	A description of the format of records in a database such as the number of fields, valid data types, and so on.
data types	Supplemental information that is attached to a company or business unit. Narrative type contains free-form text. Code type contains dates, amounts, and so on.

datagram	A self-contained packet of information that is forwarded by routers, based on their address and the routing table information.
date pattern	A period of time that is set for each period in standard and 52-period accounting and forecasting.
DCE	See distributed computing environment.
DEB	See déclaration d'echange de biens.
debit memo	In Accounts Payable, a voucher that is entered with a negative amount. Enter this type of voucher when a supplier sends you a credit so that you can apply the amount to open vouchers when you issue payment to the supplier.
debit memo	A form that is issued by a customer, requesting an adjustment of the amount, which is owed to the supplier.
debit statement	A list of debit balances.
de-blend	When blend off does not result in a product that is acceptable to customers. The further processing of product to adjust specific physical and chemical properties to within specification ranges. See also blend off.
déclaration d'echange de biens (DEB)	The French term that is used for the Intrastat report.
delayed billing	The invoicing process is delayed until the end of a designated period.
delta load	A batch process that is used to compare and update records between specified environments.
denominated-in currency	The company currency in which financial reports are based.
deployment server	A server that is used to install, maintain, and distribute software to one or more enterprise servers and client workstations.
detail	The specific information that makes up a record or transaction. Contrast with summary.
detail information	Information that primarily relates to individual lines in a sales or purchase order.
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate, store-and-forward.
direct input	The system calculates the net units when you enter gross volume, temperature, and gravity or density. This data is generally entered during product receiving from the certificate that is prepared by an independent inspector.
direct ship orders	A purchase order that is issued to a third-party supplier who designates the destination as the customer. A direct ship sales order is also created for the customer. Direct ship orders occur when a product is not available from a company-owned or company-operated source, so the system creates an order to ship the product from a third-party source directly to the customer. Sometimes referred to as a drop ship or third-party supply.
direct usage	Consumption of resources that are attributable to specific production runs because the resources were directly issued to the schedule/order.

director	An EnterpriseOne user interface that guides a user interactively through an EnterpriseOne process.
dirty cargo	Term that refers to crude oil cargoes or other non-refined petroleum cargoes. See also clean cargo.
dispatch planning	Efficient planning and scheduling of product deliveries. Considerations include: Dispatch groups Scheduled delivery date Scheduled delivery time Preferred delivery date Preferred delivery time Average delivery time for that geographical location Available resources Special equipment requirements at the product's source or destination.
displacement days	The number of days that are calculated from today's date by which you group vouchers for payment. For example, if today's date is March 10 and you specify three displacement days, the system includes vouchers with a due date through March 13 in the payment group. Contrast with pay-through date.
display sequence	A number that the system uses to re-order a group of records on the form.
distributed computing environment (DCE)	A set of integrated software services that allows software which is running on multiple computers to perform seamless and transparently to the end-users. DCE provides security, directory, time, remote procedure calls, and files across computers running on a network.
distributed data processing	Processing in which some of the functions are performed across two or more linked facilities or systems.
distributed database management system (DDBMS)	A system for distributing a database and its control system across many geographically dispersed machines.
do not translate (DNT)	A type of data source that must exist on the AS/400 because of BLOB restrictions.
double-byte character set (DBCS)	A method of representing some characters by using one byte and other characters by using two bytes. Double-byte character sets are necessary to represent some characters in the Japanese, Korean, and Chinese languages.
downgrade profile	A statement of the hierarchy of allowable downgrades. Includes substitutions of items, and meeting tighter specifications for those products with wider or overlapping specification ranges.
DTA	Datenträgeraustausch. A Swiss payment format that is required by Telekurs (Payserv).
dual pricing	To provide prices for goods and services in two currencies. During the euro transition period, dual pricing between the euro and Economic and Monetary Union (EMU) member currencies is encouraged.

dynamic link library (DLL)	A set of program modules that are designed to be invoked from executable files when the executable files are run, without having to be linked to the executable files. They typically contain commonly used functions.
dynamic partitioning	The ability to dynamically distribute logic or data to multiple tiers in a client/server architecture.
economy of scale	A phenomenon whereby larger volumes of production reduce unit cost by distributing fixed costs over a larger quantity. Variable costs are constant; but fixed costs per unit are reduced, thereby reducing total unit cost.
edit mode	A processing mode or condition where the user can alter the information in a form.
edit rule	A method that is used for formatting user entries, validating user entries, or both, against a predefined rule or set of rules.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field that is based on a processing option value, or calling a business function. Contrast with business function event rule. See also event rule.
employee work center	A central location for sending and receiving all EnterpriseOne messages (system and user-generated), regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages. With respect to workflow, the Message Center is MAPI compliant and supports drag-and-drop work reassignment, escalation, forward and reply, and workflow monitoring. All messages from the message center can be viewed through EnterpriseOne messages or Microsoft Exchange.
Emulator	An item of software or firmware that allows one device to imitate the functioning of another.
encapsulation	The ability to confine access to and manipulation of data within an object to the procedures that contribute to the definition of that object.
engineering change order (ECO)	A work order document that is used to implement and track changes to items and resulting assemblies. The document can include changes in design, quantity of items required, and the assembly or production process.
enhanced analysis database	A database containing a subset of operational data. The data on the enhanced analysis database performs calculations and provides summary data to speed generation of reports and query response times. This solution is appropriate when external data must be added to source data, or when historical data is necessary for trend analysis or regulatory reporting. See also duplicated database, enterprise data warehouse.
enterprise server	A computer containing programs that collectively serve the needs of an enterprise rather than a single user, department, or specialized application.
EnterpriseOne object	A re-usable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects. See also object.
EnterpriseOne process	Allows EnterpriseOne clients and servers to handle processing requests and execute transactions. A client runs one process, and servers can have multiple instances of a process. EnterpriseOne processes can also be dedicated to specific

	tasks (for example, workflow messages and data replication) to ensure that critical processes do not have to wait if the server is particularly busy.
EnterpriseOne web development computer	A standard EnterpriseOne Windows developer computer with the additional components installed: Sun's JDK 1.1. JFC (0.5.1). Generator Package with Generator.Java and JDECOM.dll. R2 with interpretive and application controls/form.
environment workbench	During the Installation Workbench process, Environment Workbench copies the environment information and Object Configuration Manager tables for each environment from the Planner data source to the System release number data source. It also updates the Environment Plan detail record to reflect completion.
equivalent fuel	A barrel of equivalent fuel supplies six million BTUs of heat. Fuel gas quantities are usually calculated as equivalent fuel barrels in economic calculations for refinery operations.
escalation monitor	A batch process that monitors pending requests or activities, and restarts or forwards them to the next step or user after they have been inactive for a specified amount of time.
ESR	Einzahlungsschein mit Referenznummer. A pay slip with a reference number.
event rule	[In EnterpriseOne] A logic statement that instructs the system to perform one or more operations that are based on an activity that can occur in a specific application, such as entering a form or exiting a field.
exit bar	[In EnterpriseOne] The tall pane with icons in the left portion of many EnterpriseOne program windows.
facility	An entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit.
fast path	[In EnterpriseOne] A command prompt that allows the user to move quickly among menus and applications by using specific commands.
file handle	A temporary reference (typically a number) that is assigned to a file which has been opened by the operating system and is used throughout the session to access the file.
file server	A computer that stores files to be accessed by other computers on the network.
find/browse	A type of form used to: Search, view, and select multiple records in a detail area. Delete records. Exit to another form. Serve as an entry point for most applications.

firm planned order (FPO)	A work order that has reached a user defined status. When this status is entered in the processing options for the various manufacturing programs, messages for those orders are not exploded to the components.
fiscal date pattern	A representation of the beginning date for the fiscal year and the ending date for each period in that year.
fix/inspect	A type of form used to view, add, or modify existing records. A fix/inspect form has no detail area.
fixed quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a fixed quantity relationship to its parent, the amount of the component does not change when the software calculates parts list requirements for different work order quantities. Contrast with variable quantity.
flexible account numbers	The format of account numbers for journal entries. The format that you set up must be the three segments: Business unit. Object. Subsidiary.
form design aid (FDA)	The EnterpriseOne GUI development tool for building interactive applications and forms.
form exit	[In EnterpriseOne] An option that is available as a button on the Form Exit bar or as a selection in the Form menu. It allows users to open an interconnected form.
form interconnection	Allows one form to access and pass data to another form. Form interconnections can be attached to any event; however, they are normally used when a button is clicked.
form type	The following form types are available in EnterpriseOne: Find/browse. Fix/inspect. Header detail. Headerless detail. Message. Parent/child. Search/select.
form-to-form call	A request by a form for data or functionality from one of the connected forms.
framework	[In object-oriented systems] A set of object classes that provide a collection of related functions for a user or piece of software.
frozen cost	The cost of an item, operation, or process after the frozen update program is run; used by the Manufacturing Accounting system.
frozen update program	A program that freezes the current simulated costs, thereby finalizing them for use by the Manufacturing Accounting system.

globally unique identifier (GUI)	A 16-byte code in the Component Object Model that identifies an interface to an object across all computers and networks.
handle	[In programming] A pointer that contains the address of another pointer, which, in turn, contains the address of the desired object.
hard commitment	The number of items that are reserved for a sales order, work order, or both, from a specific location, lot, or both.
hard error	An error that cannot be corrected by a given error detection and correction system.
header	Information at the beginning of a table or form. Header information is used to identify or provide control information for the group of records that follows.
header information	Information that pertains to the entire order.
hover help	A help function that provides contextual information or instructions when a cursor moves over a particular part of the interface element for a predefined amount of time.
ICMS	Imposto sobre circulação de mercadoria e servicos. In Brazil, a state tax that is applied to the movement of merchandise and some services.
ICMS Substituto	Imposto sobre circulacao de mercadoria e servicos substituto. In Brazil, the ICMS tax that is charged on interstate transactions, or on special products and clients.
ICMS Substituto-Markup	See imposto sobre circulação de mercadoria e servicos substituto-markup.
imposto de renda (IR)	Brazilian income tax.
imposto sobre produtos industrializados	In Brazil, a federal tax that applies to manufactured goods (domestic and imported).
imposto sobre services (ISS)	In Brazil, tax on services.
inbound document	A document that is received from a trading partner using Electronic Data Interface (EDI). This document is also referred to as an inbound transaction.
indented tracing	Tracking all lot numbers of intermediates and ingredients that are consumed in the manufacture of a given lot of product, down through all levels of the bill of material, recipe, or formula.
indexed allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a fixed percentage.
indirect measurement	Determining the quantity on-hand by: Measuring the storage vessels and calculating the content's balance quantity. or Theoretically calculating consumption of ingredients and deducting them from the on-hand balance.

indirect usage	Determining what should have been used by multiplying receipt quantity of the parent times the quantity per statement in the formula, recipe, or bill of material. This transaction typically affects both consumption on schedule as well as issue from on-hand balances.
in-process rework	Recycling a semi processed product that does not meet acceptable standards. Further processing takes the product out of a given operation and sends it back to the beginning of that operation or a previous operation (for example, unreacted materials). Rework that is detected prior to receipt of finished goods and corrected during the same schedule run.
INPS withholding tax	Instituto Nazionale di Previdenza Sociale withholding tax. In Italy, a 12% social security withholding tax that is imposed on payments to certain types of contractors. This tax is paid directly to the Italian social security office.
inscrição estadual	ICMS tax ID. In Brazil, the state tax ID.
inscrição municipal	ISS tax ID. In Brazil, the municipal tax ID.
integrated toolset	Unique to EnterpriseOne is an industrial-strength toolset that is embedded in the already comprehensive business applications. This toolset is the same toolset that is used by PeopleSoft to build EnterpriseOne interactive and batch applications. Much more than a development environment, however, the EnterpriseOne integrated toolset handles reporting and other batch processes, change management, and basic data warehousing facilities.
integrity test	A process that is used to supplement a company's internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interbranch sales order	A sales order that is used for transactions between branch/plants other than the selling branch/plant.
Interoperability	The ability of different computer systems, networks, operating systems, and applications to work together and share information.
inventory pricing rule	A discount method that is used for purchases from suppliers and sales to customers. The method is based on effectivity dates, up-to quantities, and a factor by which you can mark up or discount the price or cost.
inventory turn	The number of times that the inventory cycles, or turns over, during the year. A frequently used method to compute inventory turnover is to divide the annual costs of sales by the average inventory level.
invoice	An itemized list of goods that are shipped or services that are rendered, stating quantities, prices, fees, shipping charges, and so on. Companies often have their invoices mailed to a different address than where they ship products. In such cases, the bill-to address differs from the ship-to address.
IP	See imposto sobre produtos industrializados.
IR	See imposto de renda.
IServer Service	Developed by PeopleSoft, this Internet server service resides on the Web server and is used to speed up delivery of the Java class files from the database to the client.

ISS	See imposto sobre servicos.
jargon	An alternate data dictionary item description that EnterpriseOne or PeopleSoft World displays, based on the product code of the current object.
java application server	A component-based server that resides in the middle-tier of a server-centric architecture and provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that allows heterogeneous servers to access each other's data.
jde.ini	A PeopleSoft file (or member for AS/400) that provides the runtime settings that are required for EnterpriseOne initialization. Specific versions of the file or member must reside on every machine that is running EnterpriseOne, including workstations and servers.
JDE.LOG	The main diagnostic log file of EnterpriseOne. Always located in the root directory on the primary drive. Contains status and error messages from the startup and operation of EnterpriseOne.
JDEBASE Database Middleware	PeopleSoft proprietary database middleware package that provides two primary benefits: 1. Platform-independent APIs for multidatabase access. These APIs are used in two ways: a. By the interactive and batch engines to dynamically generate platform-specific SQL, depending on the data source request. b. As open APIs for advanced C business function writing. These APIs are then used by the engines to dynamically generate platform-specific SQL. 2. Client-to-server and server-to-server database access. To accomplish this access, EnterpriseOne is integrated with a variety of third-party database drivers, such as Client Access 400 and open database connectivity (ODBC).
JDECallObject	An application programming interface that is used by business functions to invoke other business functions.
JDEIPC	Communications programming tools that are used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.
JDENET	PeopleSoft proprietary middleware software. JDENET is a messaging software package.
JDENET communications middleware	PeopleSoft proprietary communications middleware package for EnterpriseOne. It is a peer-to-peer, message-based, socket-based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all EnterpriseOne supported platforms.
just in time installation (JITI)	EnterpriseOne's method of dynamically replicating objects from the central object location to a workstation.
just in time replication (JITR)	EnterpriseOne's method of replicating data to individual workstations. EnterpriseOne replicates new records (inserts) only at the time that the user needs the data. Changes, deletes, and updates must be replicated using Pull Replication.

Kagami	In Japan, summarized invoices that are created monthly (in most cases) to reduce the number of payment transactions.
latitude	The X coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
laytime (or layhours)	The amount of time that is allotted to a tanker at berth to complete loading or discharging cargo. This time is usually expressed in running hours, and is fixed by prior agreement between the vessel owner and the company that is chartering the vessel. Laytime is stipulated in the charter, which states exactly the total of number of hours that are granted at both loading and unloading ports, and indicates whether such time is reversible. A statement of "Seventy-Two Hours, Reversible" means that a total of 72 hours is granted overall at both ports, and any time saved at one port can be applied as a credit at the other port. For example, if the vessel uses only 32 hours instead of 36 hours to load cargo, it can apply an additional four hours to the 36 hours allotted at the discharge port. Such considerations are important for purposes of computing demurrage.
leading zeros	A series of zeros that certain facilities in PeopleSoft systems place in front of a value that is entered. This situation normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers that you enter. The result appears as 00004567.
ledger type	A code that designates a ledger which is used by the system for a particular purpose. For example, all transactions are recorded in the AA (actual amounts) ledger type in their domestic currency. The same transactions can also be stored in the CA (foreign currency) ledger type.
level break	The position in a report or text where a group of similar types of information ends and another one begins.
libro IVA	Monthly VAT report. In Italy, the term for the report that contains the detail of invoices and vouchers that were registered during each month.
line of business	A description of the nature of a company's work; also a tool to control the relationship with that customer, including product pricing.
linked service type	A service type that is associated with a primary service type. Linked service types can be cancelled, and the maintenance tasks are performed when the primary service type to which they are linked comes due. You can specify whether the system generates work orders for linked service types, as well as the status that the system assigns to work orders that have already been generated. Sometimes referred to as associated service types. See also primary service type and service type.
livro razao	In Brazil, a general ledger report.
load balancing	The act of distributing the number of processes proportionally to all servers in a group to maximize overall performance.
location workbench	During the Installation Workbench process, Location Workbench copies all locations that are defined in the installation plan from the Location Master table in the Planner data source to the System data source.

log files	Files that track operations for a process or application. Reviewing log files is helpful for troubleshooting problems. The file extension for log files is .LOG.
logic data source	Any code that provides data during runtime.
logical compartment	One of two ways that is identified in the transportation constants to display compartments on vehicles. Logical display numbers the compartments sequentially. For example, if two vehicles are on a trip and each vehicle has three compartments, the logical display is 1,2,3,4,5,6.
logical file	A set of keys or indices that is used for direct access or ordered access to the records in a physical file. Several logical files can have different accesses to a physical.
logical shelf	A logical, not physical, location for inventory that is used to track inventory transactions in loan/borrow, or exchange agreements with other companies. See also logical warehouse.
logical warehouse	Not a physical warehouse containing actual inventory, but a means for storing and tracking information for inventory transactions in loan/borrow, or exchange agreements with other companies.
longitude	The Y coordinate of the location of an item in the warehouse. The system can use latitude, longitude, and height when suggesting locations for putaway, replenishment, and picking.
LSV	Lastschriftverfahren. A Swiss auto debit format that is required by Telekurs (Payserv).
mail merge	A mass-mail facility that takes names, addresses, and (sometimes) pertinent facts about recipients and merges the information into a form letter or a similarly basic document.
mailmerge workbench	[In EnterpriseOne] An application that merges Microsoft Word 6.0 (or higher) word-processing documents with EnterpriseOne records to automatically print business documents.
main fuels	Usually refers to bulk fuel products, but sometimes includes packaged products.
maintenance loop	See maintenance route.
maintenance route	A method of performing PMs for multiple pieces of equipment from a single preventive maintenance work order. A maintenance route includes pieces of equipment that share one or more identical maintenance tasks which can be performed at the same time for each piece of equipment. Sometimes referred to as maintenance loop.
maintenance work order	In PeopleSoft EnterpriseOne systems, a term that is used to distinguish work orders created for the performance of equipment and plant maintenance from other work orders, such as manufacturing work orders, utility work orders, and engineering change orders.

manufacturing and distribution planning	Planning that includes resource and capacity planning, and material planning operations. Resource and capacity planning allows you to prepare a feasible production schedule that reflects your demand forecasts and production capability. Material Planning Operations provides a short-range plan to cover material requirements that are needed to make a product.
mapping	A set of instructions that describes how one data structure passes data to another.
master business function	An interactive master file that serves as a central location for adding, changing, and updating information in a database.
master business function	A central system location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. Master business functions ensure uniform processing according to guidelines that you establish.
master table	A database table that is used to store data and information that is permanent and necessary to the system's operation. Master tables might contain data such as paid tax amounts, supplier names, addresses, employee information, and job information.
matching document	A document that is associated with an original document to complete or change a transaction. For example, a receipt is the matching document of an invoice.
media object	An electronic or digital representation of an object.
media storage objects	Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.
memory violation	An error that occurs as the result of a memory leak.
menu selection	An option on a menu that initiates a software function directly.
message center	A central location for sending and receiving all EnterpriseOne messages (system- and user-generated), regardless of the originating application or user.
messaging application programming interface (MAPI)	An architecture that defines the components of a messaging system and how they behave. It also defines the interface between the messaging system and the components.
metal content	A series of properties of a blended product that help to determine its suitability for a prescribed purpose.
metals management	The process of maintaining information about the location and status of durable product containers such as liquid petroleum gas (LPG) cylinders.
mobile inventory	Inventory that is transferred from a depot to a barge or truck for milk-run deliveries.
modal	A restrictive or limiting interaction that is created by a given condition of operation. Modal often describes a secondary window that restricts a user's interaction with other windows. A secondary window can be modal with respect to its primary window or to the entire system. A modal dialog box must be closed by the user before the application continues.

model work order	For scheduled preventive maintenance or for a condition-based alert, a model work order functions as a template for the creation of other work orders. You can assign model work orders to service types and condition-based alerts. When the service type comes due or the alert is generated, the system automatically generates a work order that is based on information from the model work order.
modeless	Not restricting or limiting interaction. Modeless often describes a secondary window that does not restrict a user's interaction with other windows. A modeless dialog box stays on the screen and is available for use at any time, but also permits other user activities.
multiple stocking locations	Authorized storage locations for the same item number at locations, in addition to the primary stocking location.
multitier architecture	A client/server architecture that allows multiple levels of processing. A tier defines the number of computers that can be used to complete some defined task.
named event rules (NER)	Also called business function event rules. Encapsulated, re-usable business logic that is created by using event rules, rather than C programming.
national language support (NLS)	Mechanisms that are provided to facilitate internationalization of both system and application user interfaces.
natureza da operação	Transaction nature. In Brazil, a code that classifies the type of commercial transaction to conform to the fiscal legislation.
negative pay item	An entry in an account that indicates a prepayment. For example, you might prepay a supplier before goods are sent or prepay an employee's forecasted expenses for a business trip. The system stores these pending entries, assigning them a minus quantity as debit amounts in a designated expense account. After the prepaid goods are received or the employee submits an expense report, entering the actual voucher clears all of the negative pay items by processing them as regular pay items. Note that a negative pay item can also result from entering a debit memo (A/P) or a credit memo (A/R).
net added cost	The cost to manufacture an item at the current level in the bill of material. Thus, for manufactured parts, the net added cost includes labor, outside operations, and cost extras applicable to this level in the bill of material, but not materials (lower-level items). For purchased parts, the net added cost also includes the cost of materials.
next status	The next step in the payment process for payment control groups. The next status can be either WRT (write) or UPD (update).
node	A termination point for two or more communications links. A node can serve as the control location for forwarding data among the elements of a network or multiple networks, as well as performing other networking and, in some cases, local processing.
non-inventory items	See non-stock items.
non-list price	A price for bulk products that is determined by its own algorithms, such as a rolling average or commodity price plus.
non-prime product	A manufactured product with revenue potential that is less than the product planned for, or scheduled to be produced.

non-stock items	Items that the system does not account for as part of the inventory. For example, office supplies, or packaging materials can be non-stock items.
nota fiscal	In Brazil, a legal document that must accompany all commercial transactions.
nota fiscal fatura	In Brazil, a nota fiscal and invoice information.
notula	In Italy, the process whereby a business does not recognize value added tax until the payment of a voucher.
object configuration manager (OCM)	EnterpriseOne's object request broker and the control center for the runtime environment. It keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, the Object Configuration Manager directs access to it by using defaults and overrides for a given environment and user.
object embedding	When an object is embedded in another document, an association is maintained between the object and the application that created it; however, any changes made to the object are also only kept in the compound document. See also object linking.
object librarian	A repository of all versions, applications, and business functions that are re-usable in building applications.
object linking	When an object is linked to another document, a reference is created with the file in which the object is stored, as well as with the application that created it. When the object is modified, either from the compound document or directly through the file in which it is saved, the change is reflected in that application as well as anywhere it has been linked. See also object embedding.
object linking and embedding (OLE)	A technology for transferring and sharing information among applications by allowing the integration of objects from diverse applications, such as graphics, charts, spreadsheets, text, or an audio clip from a sound program. OLE is a compound document standard that was developed by Microsoft Corporation. It enables you to create objects with one application, and then link or embed them in a second application. Embedded objects retain their original format and links to the application that created them. See also object embedding, object linking.
object management workbench (OMW)	The change management system that is used for EnterpriseOne development.
object-based technology (OBT)	A technology that supports some of the main principles of object-oriented technology: Classes. Polymorphism.I Inheritance. Encapsulation.
object-oriented technology (OOT)	Brings software development past procedural programming into a world of re-usable programming that simplifies development of applications. Object orientation is based on the following principles: Classes. Polymorphism.I

	Inheritance. Encapsulation.
offsetting account	An account that reduces the amount of another account to provide a net balance. For example, a credit of 200 to a cash account might have an offsetting entry of 200 to an A/P Trade (liability) account.
open database connectivity (ODBC)	Defines a standard interface for different technologies to process data between applications and different data sources. The ODBC interface comprises set of function calls, methods of connectivity, and representation of data types that define access to data sources.
open systems interconnection (OSI)	The OSI model was developed by the International Standards Organization (ISO) in the early 1980s. It defines protocols and standards for the interconnection of computers and network equipment.
order detail line	A part of an order that contains transaction information about a service or item being purchased or sold, such as quantity, cost, price, and so on.
order hold	A flag that stops the processing of an order because it has exceeded the credit or budget limit, or has another problem.
order-based pricing	Pricing strategy that grants reductions in price to a customer. It is based upon the contents and relative size (volume or value) of the order as a whole.
outbound document	A document that is sent to a trading partner using EDI. This term is also referred to as an outbound transaction.
outturn	The quantity of oil that is actually received into a buyer's storage tanks when a vessel is unloaded. For various reasons (vaporization, clingage to vessel tank walls, and so on), the amount of a product pumped into shore tankage at unloading is often less than the quantity originally loaded onto the vessel, as certified by the Bill of Lading. Under a delivered or CIF outturn transaction, the buyer pays only for the barrels actually "turned out" by the vessel into storage. When a buyer is paying CIF Bill of Lading figures, a loss of 0.5% of total cargo volume is considered normal. Losses in excess of 0.5%, however, are either chargeable to the seller or are covered by specialized insurance that covers partial, as well as total, loss of the cargo.
overhead	In the distillation process, that portion of the charge that leaves the top of the distillation column as vapor. This definition is strictly as it relates to ECS.
override conversion method	A method of calculating exchange rates that is set up between two specific currencies. For those specific currencies, this method overrides the conversion method in General Accounting Constants and does not allow inverse rates to be used when calculating currency amounts.
package / package build	A collection of software that is grouped into a single entity for modular installation. EnterpriseOne objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where the installation program can find them on the deployment server. It is a point-in-time "snapshot" of the central objects on the deployment server.

package location	The directory structure location for the package and its set of replicated objects. This location is usually \\deployment server\release\path_code\package\ package name. The replicated objects for the package are placed in the subdirectories under this path. This location is also where the package is built or stored.
package workbench	During the Installation Workbench process, Package Workbench transfers the package information tables from the Planner data source to the System - release number data source. It also updates the Package Plan detail record to reflect completion.
packaged products	Products that, by their nature, must be delivered to the customer in containers which are suitable for discrete consumption or resale.
pane/panel	A resizable subarea of a window that contains options, components, or other related information.
paper clip	An icon that is used to indicate that a media object is attached to a form or record.
parent/child form	A type of form that presents parent/child relationships in an application on one form: The left portion of the form presents a tree view that displays a visual representation of a parent/child relationship. The right portion of the form displays a detail area in browse mode. The detail area displays the records for the child item in the tree. The parent/child form supports drag and drop functionality.
parent/child relationship	See parent/component relationship.
parent/component relationship	1. In Capital Asset Management, the hierarchical relationship of a parent piece of equipment to its components. For example, a manufacturing line could be a parent and the machinery on the line could be components of the line. In addition, each piece of machinery could be a parent of still more components. 2. In Product Data Management, a hierarchical relationship of the components and subassemblies of a parent item to that parent item. For example, an automobile is a parent item; its components and subassemblies include: engine, frame, seats, and windows. Sometimes referred to as parent/child relationship.
partita IVA	In Italy, a company fiscal identification number.
pass-through	A process where data is accepted from a source and forwarded directly to a target without the system or application performing any data conversion, validation, and so on.
pay on consumption	The method of postponing financial liability for component materials until you issue that material to its consuming work order or rate schedule.
payment group	A system-generated group of payments with similar information, such as a bank account. The system processes all of the payments in a payment group at the same time.
PeopleSoft database	See JDEBASE Database Middleware.
performance tuning	The adjustments that are made for a more efficient, reliable, and fast program.

persistent object	An object that continues to exist and retains its data beyond the duration of the process that creates it.
pervasive device	A type of intelligent and portable device that provides a user with the ability to receive and gather information anytime, from anywhere.
planning family	A means of grouping end items that have similarity of design or manufacture.
plug-in	A small program that plugs into a larger application to provide added functionality or enhance the main application.
polymorphism	A principle of object-oriented technology in which a single mnemonic name can be used to perform similar operations on software objects of different types.
portal	A Web site or service that is a starting point and frequent gateway to a broad array of on-line resources and services.
Postfinance	A subsidiary of the Swiss postal service. Postfinance provides some banking services.
potency	Identifies the percent of an item in a given solution. For example, you can use an 80% potent solution in a work order that calls for 100% potent solution, but you would use 25% more, in terms of quantity, to meet the requirement (100 / 80 = 1.25).
preference profile	The ability to define default values for specified fields for a user defined hierarchy of items, item groups, customers, and customer groups. In Quality Management setup, this method links test and specification testing criteria to specific items, item groups, customers, or customer groups.
preflush	A work order inventory technique in which you deduct (relieve) materials from inventory when the parts list is attached to the work order or rate schedule.
preventive maintenance cycle	The sequence of events that make up a preventive maintenance task, from its definition to its completion. Because most preventive maintenance tasks are commonly performed at scheduled intervals, parts of the preventive maintenance cycle repeat, based on those intervals.
preventive maintenance schedule	The combination of service types that apply to a specific piece of equipment, as well as the intervals at which each service type is scheduled to be performed.
primary service type	A service type to which you can link related service types. For example, for a particular piece of equipment, you might set up a primary service type for a 1000-hour inspection and a linked service type for a 500-hour inspection. The 1000-hour inspection includes all of the tasks performed at 500 hours. When a primary service type is scheduled to be performed, the system schedules the linked service type. See also linked service type.
pristine environment	An EnterpriseOne environment that is used to test unaltered objects with PeopleSoft demonstration data or for training classes. You must have this environment so you can compare pristine objects that you modify.
processing option	A data structure that allows users to supply parameters that regulate the execution of a batch program or report.
product data management (PDM)	In PeopleSoft EnterpriseOne software, the system that enables a business to organize and maintain information about each item which it manufactures. Features of this system, such as bills of material, work centers, and routings,

	define the relationships among parents and components, and how they can be combined to manufacture an item. PDM also provides data for other manufacturing systems including Manufacturing Accounting, Shop Floor Management, and Manufacturing and Distribution Planning.
product line	A group of products with similarity in manufacturing procedures, marketing characteristics, or specifications that allow them to be aggregated for planning; marketing; and, occasionally, costing.
product/process definition	A combination of bill of material (recipe, formula, or both) and routing (process list). Organized into tasks with a statement of required consumed resources and produced resources.
production environment	An EnterpriseOne environment in which users operate EnterpriseOne software.
program temporary fix (PTF)	A representation of changes to PeopleSoft software that your organization receives on magnetic tapes or diskettes.
project	[In EnterpriseOne] A virtual container for objects being developed in Object Management Workbench.
projected cost	The target expenditure in added value for material, labor, and so on, during manufacture. See also standard cost.
promotion path	The designated path for advancing objects or projects in a workflow.
protocollo	See registration number.
PST	Provincial sales tax. A tax that is assessed by individual provinces in Canada.
published table	Also called a "Master" table, this is the central copy to be replicated to other machines and resides on the "publisher" machine. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
publisher	The server that is responsible for the published table. The Data Replication Publisher Table (F98DRPUB) identifies all of the published tables and their associated publishers in the enterprise.
pull replication	One of the EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers that use EnterpriseOne's data replication tools. The only time that pull subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the pull subscriber to the server machine that stores the Data Replication Pending Change Notification table (F98DRPCN).
query by example (QBE)	Located at the top of a detail area, this area is used to search for data to display in the detail area.
rate scheduling	A method of scheduling product or manufacturing families, or both. Also a technique to determine run times and quantities of each item within the family to produce enough of each individual product to satisfy demand until the family can be scheduled again.

rate type	For currency exchange transactions, the rate type distinguishes different types of exchange rates. For example, you can use both period average and period-end rates, distinguishing them by rate type.
real-time	Pertaining to information processing that returns a result so rapidly that the interaction appears to be instantaneous.
receipt routing	A series of steps that is used to track and move items within the receipt process. The steps might include in-transit, dock, staging area, inspection, and stock.
referential integrity	Ensures that a parent record cannot be deleted from the database when a child record for exists.
regenerable	Source code for EnterpriseOne business functions can be regenerated from specifications (business function names). Regeneration occurs whenever an application is recompiled, either for a new platform or when new functionality is added.
register types and classes	In Italian VAT Summary Reporting, the classification of VAT transactions.
relationship	Links tables together and facilitates joining business views for use in an application or report. Relationships that are created are based on indexes.
rélevé d'identité bancaire (RIB)	In France, the term that indicates the bank transit code, account number, and check digit that are used to validate the bank transit code and account number. The bank transit code consists of the bank code and agency code. The account number is alphanumeric and can be as many as 11 characters. PeopleSoft supplies a validation routine to ensure RIB key correctness.
remessa	In Brazil, the remit process for A/R.
render	To include external data in displayed content through a linking mechanism.
repasse	In Brazil, a discount of the ICMS tax for interstate transactions. It is the adjustment between the interstate and the intrastate ICMS tax rates.
replenishment point	The location on or near the production line where additional components or subassemblies are to be delivered.
replication server	A server that is responsible for replicating central objects to client machines.
report design aid (RDA)	The EnterpriseOne GUI tool for operating, modifying, and copying report batch applications.
repost	In Sales, the process of clearing all commitments from locations and restoring commitments, based on quantities from the Sales Order Detail table (F4211).
resident	Pertaining to computer programs or data while they remain on a particular storage device.
retorno	In Brazil, the receipt process for A/R.
RIB	See rélevé d'identité bancaire.
ricevute bancarie (RiBa)	In Italy, the term for accounts receivable drafts.
riepilogo IVA	Summary VAT monthly report. In Italy, the term for the report that shows the total amount of VAT credit and debit.

ritenuta d'acconto	In Italy, the term for standard withholding tax.
rollback	[In database management] A feature or command that undoes changes in database transactions of one or more records.
rollup	See cost rollup.
row exit	[In EnterpriseOne] An application shortcut, available as a button on the Row Exit bar or as a menu selection, that allows users to open a form that is related to the highlighted grid record.
runtime	The period of time when a program or process is running.
SAD	The German name for a Swiss payment format that is accepted by Postfinance.
SAR	See software action request.
scalability	The ability of software, architecture, hardware, or a network to support software as it grows in size or resource requirements.
scripts	A collection of SQL statements that perform a specific task.
scrub	To remove unnecessary or unwanted characters from a string.
search/select	A type of form that is used to search for a value and return it to the calling field.
selection	Found on PeopleSoft menus, selections represent functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
serialize	To convert a software object into a stream of bytes to store on a disk or transfer across a network.
server map	The server view of the object configuration mapping.
server workbench	During the Installation Workbench process, Server Workbench copies the server configuration files from the Planner data source to the System release number data source. It also updates the Server Plan detail record to reflect completion.
service interval	The frequency at which a service type is to be performed. Service intervals can be based on dates, periods, or statistical units that are user defined. Examples of statistical units are hours, miles, and fuel consumption.
service type	An individual preventive maintenance task or procedure, such as an inspection, lubrication, or overhaul. Service types can apply to a specific piece of equipment or to a class of equipment. You can specify that service types come due based on a predetermined service interval, or whenever the task that is represented by the service type becomes necessary.
servlet	A [small] program that extends the functionality of a Web server by generating dynamic content and interacting with Web clients by using a request-response paradigm.
share path	The network node under which one or more servers or objects reside.
shop floor management	A system that uses data from multiple system codes to help develop, execute, and manage work orders and rate schedules in the enterprise.

silent mode	A method for installing or running a program that does not require any user intervention.
silent post	A type of post that occurs in the background without the knowledge of the user.
simulated cost	After a cost rollup, the cost of an item, operation, or process according to the current cost scenario. This cost can be finalized by running the frozen update program. You can create simulated costs for a number of cost methods—for example, standard, future, and simulated current costs. See also cost rollup.
single-byte character set (SBCS)	An encoding scheme in which each alphabetic character is represented by one byte. Most Western languages, such as English, can be represented by using a single-byte character set.
single-level tracking	Finding all immediate parents where a specific lot has been used (consumed).
single-voyage (spot) charter	An agreement for a single voyage between two ports. The payment is made on the basis of tons of product delivered. The owner of the vessel is responsible for all expenses.
slimer	A script that changes data in a table directly without going through a regular database interface.
smart field	A data dictionary item with an attached business function for use in the Report Design Aid application.
SOC	The Italian term for a Swiss payment format that is accepted by Postfinance.
soft commitment	The number of items that is reserved for sales orders or work orders in the primary units of measure.
soft error	An error from which an operating system or program is able to recover.
software action request (SAR)	An entry in the AS/400 database that is used for requesting modifications to PeopleSoft software.
SOG	The French term for a Swiss payment format that is accepted by Postfinance.
source directory	The path code to the business function source files belonging to the shared library that is created on the enterprise server.
special period/year	The date that determines the source balances for an allocation.
specification merge	The Specification merge is comprised of three merges: Object Librarian merge (via the Object Management Workbench). Versions List merge. Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification table merge workbench	During the Installation Workbench process, Specification Table Merge Workbench runs the batch applications that update the specification tables.
specifications	A complete description of an EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.

spot charter	See single-voyage charter.
spot rates	An exchange rate that is entered at the transaction level. Spot rates are not used on transactions between two EMU member currencies because exchange rates are irrevocably fixed to the euro.
stamp tax	In Japan, a tax that is imposed on drafts payable, receipts over 30000 Japanese yen, and all contracts. The party that issues any of the above documents is responsible for this tax.
standalone	Operating or capable of operating independently of certain other components of a computer system.
standard cost	The expected, or target cost of an item, operation, or process. Standard costs represent only one cost method in the Product Costing system. You can also calculate, for example, future costs or current costs. However, the Manufacturing Accounting system uses only standard frozen costs.
standard costing	A costing method that uses cost units that are determined before production. For management control purposes, the system compares standard costs to actual costs and computes variances.
subprocess	A process that is triggered by and is part of a larger process, and that generally consists of activities.
subscriber table	The Subscriber table (F98DRSUB), which is stored on the Publisher Server with the Data Replication Publisher table (F98DRPUB), that identifies all of the subscriber machines for each published table.
summary	The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many systems offer forms and reports that summarize information which is stored in certain tables. Contrast with detail.
super backflush	To create backflush transactions for material, labor, or both, against a work order at predefined pay points in the routing. By doing so, you can relieve inventory and account for labor amounts at strategic points throughout the manufacturing process.
supersession	Specification that a new product is replacing an active product on a specified effective date.
supplemental data	Additional types of data for customers and suppliers. You can enter supplemental data for information such as notes, comments, plans, or other information that you want in a customer or supplier record. The system maintains this data in generic databases, separate from the standard master tables (Customer Master, Supplier Master, and Address Book Master).
supplying location	The location from which inventory is transferred once quantities of the item on the production line have been depleted. In kanban processing, the supplying location is the inventory location from which materials are transferred to the consuming location when the containers are replenished.
system code	A numeric or alphanumeric designation that identifies a specific system in EnterpriseOne software.

system function	[In EnterpriseOne] A named set of pre-packaged, re-usable instructions that can be called from event rules.
table access management (TAM)	The EnterpriseOne component that handles the storage and retrieval of user defined data. TAM stores information such as data dictionary definitions; application and report specifications; event rules; table definitions; business function input parameters and library information; and data structure definitions for running applications, reports, and business functions.
table conversion workbench	During the Installation Workbench process, Table Conversion Workbench runs the table conversions that change the technical and application tables to the format for the new release of EnterpriseOne. It also updates the Table Conversions and Controls detail records to reflect completion.
table design aid (TDA)	An EnterpriseOne GUI tool for creating, modifying, copying, and printing database tables.
table event rules	Use table event rules to attach database triggers (or programs) that automatically run whenever an action occurs against the table. An action against a table is referred to as an event. When you create an EnterpriseOne database trigger, you must first determine which event will activate the trigger. Then, use Event Rules Design to create the trigger. Although EnterpriseOne allows event rules to be attached to application events, this functionality is application-specific. Table event rules provide embedded logic at the table level.
table handle	A pointer into a table that indicates a particular row.
table space	[In relational database management systems] An abstract collection of containers in which database objects are stored.
task	[In Solution Explorer and EnterpriseOne Menu] A user defined object that can initiate an activity, process, or procedure.
task view	A group of tasks in Solution Explorer or EnterpriseOne Menu that are arranged in a tree structure.
termo de abertura	In Brazil, opening terms for the transaction journal.
termo de encerramento	In Brazil, closing terms for the transaction journal.
three-tier processing	The task of entering, reviewing, approving, and posting batches of transactions.
three-way voucher match	The process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records, the purchase order, and the invoice to create vouchers.
threshold percentage	In Capital Asset Management, the percentage of a service interval that you define as the trigger for maintenance to be scheduled. For example, you might set up a service type to be scheduled every 100 hours with a threshold percentage of 90 percent. When the equipment accumulates 90 hours, the system schedules the maintenance.

throughput agreement	A service agreement in which a business partner agrees to store and manage product for another business partner for a specified time period. The second partner actually owns the stock that is stored in the first partner's depot, although the first partner monitors the stock level; suggests replenishments; and unloads, stores, and delivers product to the partner or its customers. The first partner charges a fee for storing and managing the product.
throughput reconciliation	Reconcile confirmed sales figures in a given period with the measured throughput, based on the meter readings. This process is designed to catch discrepancies that are due to transactions not being entered, theft, faulty meters, or some combination of these factors. This reconciliation is the first stage. See also operational reconciliation.
token	[In Object Management Workbench] A flag that is associated with each object which indicates whether you can check out the object.
tolerance range	The amount by which the taxes that you enter manually can vary from the tax that is calculated by the system.
TP monitor	Transaction Processing monitor. A monitor that controls data transfer between local and remote terminals and the applications that originated them. TP monitors also protect data integrity in the distributed environment and can include programs that validate data and format terminal screens.
tracing	The act of researching a lot by going backward, to discover its origin.
tracking	The act of researching a lot by going forward, to discover where it is used.
transaction set	An electronic business transaction (EDI Standard document) composed of segments.
transclude	To include the external data in the displayed content through a linking mechanism.
transfer order	An order that is used to ship inventory between branch/plants within your company and to maintain an accurate on-hand inventory amount. An interbranch transfer order creates a purchase order for the shipping location and a sales order for the receiving location.
translation adjustment account	An optional G/L account used in currency balance restatement to record the total adjustments at a company level.
translator software	The software that converts data from an application table format to an EDI Standard Format, and from EDI Standard Format to application table format. The data is exchanged in an EDI Standard, such as ANSI ASC X12, EDIFACT, UCS, or WINS.
tree structure	A type of graphical user interface that displays objects in a hierarchy.
trigger	Allows you to attach default processing to a data item in the data dictionary. When that data item is used on an application or report, the trigger is invoked by an event which is associated with the data item. EnterpriseOne also has three visual assist triggers: Calculator. Calendar. Search form.

two-way voucher match	The process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
universal batch engine (UBE)	[In EnterpriseOne] A type of application that runs a noninteractive process.
unnormalized	Data that is a random collection of data elements with repeating record groups scattered throughout. Also see Normalized.
user overrides merge	The User Overrides merge adds new user override records into a customer's user override table.
user-defined code (UDC)	A value that a user has assigned as being a valid entry for a given or specific field.
utility	A small program that provides an addition to the capabilities which are provided by an operating system.
variable numerator allocations	A procedure that allocates or distributes expenses, budgets, adjustments, and so on, among business units, based on a variable.
variable quantity	A term that indicates the bill of material relationship between a parent item and its components or ingredients. When a bill of material component has a variable quantity relationship to its parent, the amount of the component changes when the software calculates parts list requirements for different work order quantities. Contrast with fixed quantity.
variance	1. In Product Costing and Manufacturing Accounting, the difference between the frozen standard cost, the current cost, the planned cost, and the actual cost. For example, the difference between the frozen standard cost and the current cost is an engineering variance. Frozen standard costs come from the Cost Components table, and the current costs are calculated by using the current bill of material, routing, and overhead rates. 2. In Capital Asset Management, the difference between revenue that is generated by a piece of equipment and costs that are incurred by the equipment.
versions list merge	The Versions List merge preserves any non-XJDE and non-ZJDE version specifications for objects that are valid in the new release as well as their processing options data.
VESR	Verfahren Einzahlungsschein mit Referenznummer. The processing of an ESR pay slip with reference line through accounts receivable and accounts payable.
visual assist	Forms that can be invoked from a control to assist the user in determining what data belongs in the control.
voucher logging	The process of entering vouchers without distributing amounts to specific G/L accounts. The system initially distributes the total amount of each voucher to a G/L suspense account, where it is held until you redistribute it to the correct G/L account.
wareki date format	In Japan, a calendar format, such as Showa or Heisei. When a new emperor begins to reign, the government chooses the title of the date format and the year starts over at one. For instance, January 1, 1998, is equal to Heisei 10, January 1st.
wash down	A minor cleanup between similar product runs. Sometimes used in reference to the sanitation process of a food plant.

wchar_t	An internal type of a wide character. Used for writing portable programs for international markets.
web server	A server that sends information as requested by a browser and uses the TCP/IP set of protocols.
work order life cycle	In Capital Asset Management, the sequence of events through which a work order must pass to accurately communicate the progress of the maintenance tasks that it represents.
workfile	A system-generated file that is used for temporary data processing.
workflow	According to the Workflow Management Coalition, worlflow means "the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules."
workgroup server	A network server usually containing subsets of data that are replicated from a master network server.
WorldSoftware architecture	The broad spectrum of application design and programming technology that PeopleSoft uses to achieve uniformity, consistency, and complete integration throughout its software.
write payment	A step in processing payments. Writing payments includes printing checks, drafts, and creating a bank tape table.
write-off	A method for getting rid of inconsequential differences between amounts. For example, you can apply a receipt to an invoice and write off the difference. You can write off both overpayments and underpayments.
Z file	For store and forward (network disconnected) user, EnterpriseOne store-and-forward applications perform edits on static data and other critical information that must be valid to process an order. After the initial edits are complete, EnterpriseOne stores the transactions in work tables on the workstation. These work table are called Z files. When a network connection is established, Z files are uploaded to the enterprise server; and the transactions are edited again by a master business function. The master business function then updates the records in your transaction files.
z-process	A process that converts inbound data from an external system into an EnterpriseOne software table or converts outbound data into an interface table for an external system to access.
zusammenfassende melding	In Germany, the term for the EU Sales Listing.

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