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JD Edwards EnterpriseOne Tools 8.96 Foundation Guide

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JD Edwards EnterpriseOne Tools 8.96 Foundation Guide
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About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

Note. Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element 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 fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

JD Edwards 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 JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. 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 JD Edwards EnterpriseOne applications most effectively.

Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

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

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Ordering Printed Documentation

You can order printed, bound volumes of the complete line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guide CD-ROM. Oracle makes printed documentation available for each major release of JD Edwards EnterpriseOne shortly after the software is shipped. Customers and partners can order this printed documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of Oracle's PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners, the book print vendor, at 877 588 2525.

Email

Send email to MMA Partners at peoplebookspress@mmapartner.com.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize, and Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs) (JD Edwards EnterpriseOne only)	Implement, Optimize, and Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction

Resource	Navigation
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.

Typographical Convention or Visual Cue	Description
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

Implementation guides contain the following visual cues.

Notes

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

Note. Example of a note.

If the note is preceded by *Important!,* the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

Implementation guides provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See.* Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

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 implementation guides and other Oracle reference and training materials. Please send your suggestions to Documentation Manager, Oracle Corporation, 7604 Technology Way, Denver, CO, 80237. Or email us at documentation_us@oracle.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Fields Used in Implementation Guides

Address Book Number Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.

As If Currency Code Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.

Batch Number Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).

Batch Date Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.

Batch Status Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:

Blank: Batch is unposted and pending approval.

A: The batch is approved for posting, has no errors and is in balance, but has not yet been posted.

D: The batch posted successfully.

E: The batch is in error. You must correct the batch before it can post.

P: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to *E*.

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.

Business Unit Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.

Category Code Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.

Company Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.

Currency Code Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.

Document Company Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.

If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.

If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.

Document Number

Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.

Document Type

Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:

P: Accounts payable documents.

R: Accounts receivable documents.

T: Time and pay documents.

I: Inventory documents.

O: Purchase order documents.

S: Sales order documents.

Effective Date

Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and **Fiscal Year**

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

JD Edwards EnterpriseOne Tools Foundation Preface

This preface discusses Foundation companion documentation.

Foundation Companion Documentation

Additional, essential information describing the setup and design of JD Edwards EnterpriseOne Tools resides in companion documentation. The companion documentation consists of important topics that apply to the Foundation tasks, as well as other JD Edwards EnterpriseOne Tools. You should be familiar with the contents of these companion documentation depending on the application you are using:

- JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 SP1 Guide
- JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 SP1 Guide
- JD Edwards EnterpriseOne Customer Relationship Management Application Fundamentals 8.12 SP1 Guide

CHAPTER 1

Getting Started with Tools Foundation

This getting starting chapter about Oracle's JD Edwards EnterpriseOne Tools discusses:

- JD Edwards EnterpriseOne Tools Foundation Overview
- JD Edwards EnterpriseOne Tools Foundation Implementation

JD Edwards EnterpriseOne Tools Foundation Overview

JD Edwards EnterpriseOne Tools software provides a flexible, configurable solution in the face of constantly changing technology and enterprise practices. JD Edwards EnterpriseOne software is the first network-centric software that separates business rules from the underlying technology. As new technologies emerge, JD Edwards EnterpriseOne software enables you to easily add them to the framework of your enterprise.

JD Edwards EnterpriseOne Tools Foundation Implementation

This section provides an overview of what you need implemented to complete Foundation tasks.

In the planning phase of your implementation, take advantage of all of Oracle's sources of information regarding JD Edwards software, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About This Documentation* with information about where to find the most current version of each.

You might also want to complete at least one JD Edwards introductory training course, if applicable. You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows graphical user interface.

CHAPTER 2

Understanding JD Edwards EnterpriseOne Software

This chapter discusses:

- JD Edwards EnterpriseOne access.
- JD Edwards EnterpriseOne software features.
- JD Edwards EnterpriseOne system integration.
- JD Edwards EnterpriseOne foundation.

JD Edwards EnterpriseOne Access

JD Edwards EnterpriseOne supports web client users through the EnterpriseOne Menu. EnterpriseOne Menu is an HTML-based menu system that provides the ability to navigate EnterpriseOne Menus and launch an HTML version of JD Edwards EnterpriseOne. EnterpriseOne Menu is used primarily by end users to conduct end user tasks.

JD Edwards EnterpriseOne Software Features

JD Edwards EnterpriseOne software offers the following features:

- Multiplatform computing. JD Edwards EnterpriseOne software has the ability to run on different platforms. This versatility allows for easy maintenance of information across a network.
- Integrated supply chain. JD Edwards EnterpriseOne software provides the ability to use the internet and an intranet to enable you to communicate and share information with your employees, customers, and suppliers.
- Interoperability. JD Edwards EnterpriseOne software lets you leverage your existing investments in hardware, databases, and software, and integrate them with legacy and third-party products.
- Adaptability. JD Edwards EnterpriseOne software adapts easily to different languages, currencies, reporting provisions, and technology standards.
- Usability. JD Edwards EnterpriseOne software lets you point and click, drag and drop, and use fill-in-the-blank forms to easily complete your tasks.

Through the JD Edwards EnterpriseOne Portal, users access JD Edwards EnterpriseOne applications using links in the Portal's menus.

The following browsers are supported by JD Edwards EnterpriseOne:

- Safari on Mac OS
- Mozilla on Linux
- Internet Explorer on Windows

JD Edwards EnterpriseOne System Integration

JD Edwards EnterpriseOne software combines enterprise applications with an integrated toolset to tailor those applications to the needs of your business.

JD Edwards EnterpriseOne refers to each group of its software products as an application suite. The application suites support manufacturing, financials, distribution or logistics, and human resource operations for multisite and multinational organizations. Your business needs determine what application suites are installed for your enterprise system. For complex business situations, you might use several application suites to achieve a comprehensive solution.

Each application suite is made up of systems. For example, the Financial Suite contains systems such as Enhanced Accounts Receivable, system 03B; Accounts Payable, system 04; General Accounting, system 09; Fixed Assets, system 12; and others. Each system consists of applications, forms, reports, and database tables that are designed to handle specific business needs.

Because the functions and features of all the systems are similar and integrated, you are not necessarily aware of moving from one system to another when working with various applications.

This guide often refers to Address Book, system 01, to illustrate the foundational concepts of JD Edwards software. Address Book, an online version of a traditional card file, is a database of names, addresses, and phone numbers that:

- Provides easy access to all addresses for searching and reporting purposes
- Reduces the need for duplication of records
- Provides security through Business Unit assignment or Search Type authorization
- Interfaces with other JD Edwards software systems

Because it is fundamental to business solutions, Address Book provides a realistic subject for learning the foundational concepts of JD Edwards EnterpriseOne software. Many of the tasks that you perform use Address Book examples.

JD Edwards EnterpriseOne Foundation

The Foundation Guide introduces you to the integrated environment of JD Edwards EnterpriseOne. Through overviews, procedures, and examples, Foundation describes the operations and functions that are common to all applications. Foundation comprises the following topics:

Topic	Description
JD Edwards EnterpriseOne Access	Learn about the different applications that can be used as an entry point for accessing JD Edwards EnterpriseOne tools and applications.
Application User Interface	Learn about the operating environment, including menus, forms, and the grid.
Records	Learn how to locate, add, and work with database records, add objects, and format and move around on a record-entry form.
Messages and Queues	Learn to use Work Center to send and work with messages from JD Edwards EnterpriseOne users and recipients outside of the JD Edwards EnterpriseOne software environment.
Media Object Attachments	Learn how to attach objects (text, images, OLE objects, and JD Edwards EnterpriseOne shortcuts) to rows and forms.
MailMerge Workbench	Learn about merging JD Edwards EnterpriseOne system records with third-party word processing documents for automatic creation of form letters by using certain application workflows.
Interactive Versions for Applications	Learn to modify the behavior of applications through changes to processing options and interactive version detail.
Batch Versions for Reports	Learn how to create, modify, and print your own report versions.
Processing Options	Learn key functionality, types, and how to access and use processing options.

CHAPTER 3

Using the JD Edwards EnterpriseOne Web Application User Interface

This chapter provides an overview of the web application user interface, and discusses how to:

- Access the JD Edwards EnterpriseOne web client.
- Use EnterpriseOne Menu.
- View the Data in Tables and Business Views.

Understanding Web Application Forms

This section discusses web application forms.

Form Types

Applications use a variety of form types. The characteristics of each form type remain the same, regardless of the application in which you access the form.

Find/Browse Form

The Find/Browse form provides the entry point to most applications. It contains an optional query-by-example (QBE) line so that you can search any field in the grid. The standard title for a Find/Browse form begins with "Work With" followed by information that is specific to the business task. You cannot add or change existing records on a Find/Browse form.

Find/Browse forms enable you to do these tasks:

- Search, view, and select multiple records in a grid
- Exit to another form to add, change, or view a record

Search/Select Form

Use the Search/Select form to locate a value for a field. The grid displays values that are stored in a database table. When you select a value from the grid and click the Select button, that value is automatically placed in the field. For example, when you need to enter a user defined code (UDC) into a field, the search button appears, enabling you to access a Search/Select form that displays a list of UDCs. You can select an item from the list and place it in the appropriate field. You cannot edit the information that appears on this form.

Header Detail and Headerless Detail Forms

The Header Detail and Headerless Detail forms include a detail area, the OK button, and the Cancel button. You can change multiple records using these forms. The Header Detail form includes information from two different business views to provide more depth on the information that appears on the form. The Headerless Detail form provides information from only one table. Data that is common to all the records in the grid displays at the top of the form.

Header Detail and Headerless Detail forms enable you to:

- Display multiple records
- View records
- Add records
- Change records
- Delete records

Fix/Inspect Form

The Fix/Inspect form does not include a detail area. If a record was chosen on a previous form, the Fix/Inspect form displays data for that record. If you are adding a record, the Fix/Inspect form is empty, except for any default values.

Fix/Inspect forms enable you to:

- View a single record
- Add a record
- Change a record

Parent/Child Form

The Parent/Child form presents parent/child relationships in an application on one form. The left portion of the form presents a list of items. The right portion of the form displays information that relates to the selected item in the left portion of the form. The Parent/Child form supports the ability to drag and drop items from one area to another. This form includes Select and Close buttons.

You can resize the display areas according to your personal preferences.

Message Box

The message box contains information about processing that occurs when you work with JD Edwards EnterpriseOne software. For example, when you delete a record, a Confirm Delete message box appears to ask if you are sure that you want to delete the object. The message box might also include information about an event that occurs while you work with the system.

Power Forms

Power forms are web-only application forms that enable you to view multiple, interrelated views of data, grids, and tab pages on one form and to pass logic between them. The tab pages can have their own business views (BVs), and these BVs can communicate with each other and can update based on data selection and changes that occur in other BVs on the form.

Accessing JD Edwards EnterpriseOne Web Client

This section provides an overview of accessing the JD Edwards EnterpriseOne web client and discusses how to:

- Access the JD Edwards EnterpriseOne Web Client through the JD Edwards Collaborative Portal.
- Accessing the JD Edwards EnterpriseOne Web Client through the through the Enterprise Portal.
- Access the JD Edwards EnterpriseOne Web Client Directly.

Understanding JD Edwards EnterpriseOne Web Client Access

Accessing JD Edwards 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 JD Edwards EnterpriseOne-before you can launch JD Edwards EnterpriseOne applications.

To sign in to the JD Edwards EnterpriseOne 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. When your system administrator sets up your account, he or she creates a user ID and assigns you a password.

Usually, you must enter your ID and password when you launch the JD Edwards EnterpriseOne web client. However, your system administrator can configure your computer in such a way so that you appear to bypass the sign-in process. For security reasons, however, most system administrators want you to sign in manually. When you sign in to the JD Edwards EnterpriseOne web client, EnterpriseOne Menu appears. EnterpriseOne Menu enables you to access JD Edwards EnterpriseOne applications, reports, and other features.

Accessing the JD Edwards EnterpriseOne Web Client through the JD Edwards Collaborative Portal

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

Accessing the JD Edwards EnterpriseOne Web Client through the through the Enterprise Portal

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

Accessing the JD Edwards EnterpriseOne Web Client Directly

To sign in to the JD Edwards EnterpriseOne web client directly:

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

1. Launch your Web browser and navigate to your company's JD Edwards EnterpriseOne Web sign-in.

Depending on how your system administrator has configured your system, the Web sign-in might appear when you launch your browser, you might need to click a button or a link, or you might need to navigate to a particular page. Your ability to access the JD Edwards EnterpriseOne Web Client directly might have been disabled. If you do not know how to find the JD Edwards EnterpriseOne Web sign-in, 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 Environment field.
4. If you have multiple roles and wish to sign in as one of them, click theDetails button and complete the Role field.

   Note. The default value is *ALL, which signs you in as a member of all of your roles. Select the *ALL role if you are not sure which role to use.

5. If you want your computer to remember your settings for the future, select 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.

Navigating in EnterpriseOne

This section provides an overview of the EnterpriseOne Menu, and discusses how to:

- Navigate in EnterpriseOne Menu.
- Use the fast path.
- Access your favorites task view.
- Add a Task to your Favorites Task View

Understanding EnterpriseOne Navigation

EnterpriseOne Menu is the Web-based application you run to access JD Edwards EnterpriseOne applications.

Menu

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 JD Edwards Solution Explorer and JD Edwards EnterpriseOne ERP security applications to manage user accounts and to configure EnterpriseOne Menu.

Fast Path

Fast Path is a field that enables 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. 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 Fast Path. 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. Not all objects have Fast Path commands.

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

Navigating in EnterpriseOne Menu

Access EnterpriseOne Menu.

1. In EnterpriseOne Menu, click a task (that is, a folder) 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 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.

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.

   Depending on the object type, you might be able to select 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.

Accessing your Favorites Task View

To access your Favorites task view:

In EnterpriseOne Menu, click the Favoritestask.

Adding a Task to your Favorites Task View

Access EnterpriseOne Menu.

To add a task to your Favorites task view:

1. In 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 select Add To Favorites from the resulting menu.

Using the Grid

This section provides an overview of the grid and discusses:

- Create a Grid Format.
- Create a Grid Format for Pervasive Devices.
- Apply a Grid Format.
- Change a Grid Format.
- Delete a Grid Format.
- Hide or Showing Grid Columns.
- Rearrange Grid Columns.
- Set Grid Color and Font.
- Change Grid Column Width.
- Change the Sort Sequence of a Grid.
- Exporting All Records from a Grid
- Exporting Detail Area Content to Microsoft Excel, Word or to a Comma Separated Values File

Understanding the Grid

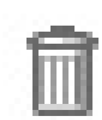
Similar to find/browse forms, hierarchical grids, or parent/child browse forms, are used to query business views (BVs) and select records from BVs for operations. However, instead of a default grid control, hierarchical grids contain a default parent child control instead. Whether or not you have hierarchical grids depends on if your system administrator incorporated them into the applications you use.

The following table describes the features of the hierarchical grid:

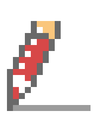
Feature	Description
Cut, Copy, and Paste	You can cut, copy, and paste a node in the tree. Cutting a node will copy the data of a node and mark the node as being cut. Copy will copy the data of a node. Paste will paste the node as the last child of the new node. If the node is copied, the original node stays. If a node has been cut, the original node is removed. Cancel Cut will cancel the operation. Use the copy, cut, and paste buttons located on the toolbar of the grid to perform these functions.
Indent/Outdent	You can change the indentation of a tree node. Use the Indent and Outdent buttons located on the toolbar of the grid to perform these functions.
Expand All	You can expand all the nodes in the tree. Use the Expand All button located on the toolbar of the grid to perform this function.
Collapse All	You can collapse all the nodes in the tree. Use the Collapse All button located on the toolbar of the grid to perform this function.
Fully Expand One Tree Node	You can fully expand a selected tree node. When this happens, all cascading children of the selected tree node will be displayed. Use the Expand All button to perform this function.
View Location Number	If your system administrator has turned on the View Location Number option, you will see a number beside each tree node. Use this number to determine the location of the tree node within the tree.
Flat Display Tree	You can make all tree nodes display on one vertical level. Child nodes will not be indented.
Select All Children	You can select all of the children in a node. Use the Select All button located on the toolbar of the grid to perform this function.
Editable Parent Child	You can edit the tree column and all the grid columns in the hierarchical grid.
Change Data Dictionary Item on the Fly	You can display custom selected columns in a user defined sequence.
Vertical Scrolling Keeps Column Header	When scrolling down grid data, grid column header will remain visible.

Understanding Grid Icons and Buttons

This table shows the icons and buttons that might display on the grid. Whether or not you see any of these icons or buttons depends on if the application you are using was designed to display them. You might see a variation of these icons and buttons, depending on the application in which you are working.

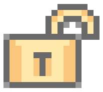


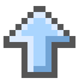
Delete

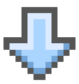


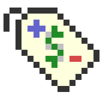
Edit

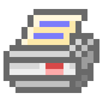

Lock

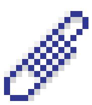

Unlock


Move Up

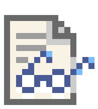

Move Down

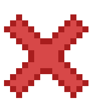

Price

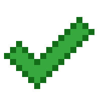

Print

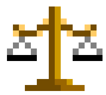

Attach


Copy


View


Toggle Off


Toggle On



Weigh

Creating a Grid Format

Your ability to create a grid format depends on whether or not your system administrator has enabled the Customize Grid option. If you do not see the Customize Grid option in the blue bar located at the top of the grid, you do not have permissions to customize the grid.

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.

Access the application for which you want to create a new grid.

1. Launch the application for which you want to create a new grid format and click theCustomize Gridlink.
2. On Select Grid Format, click the Create button.
3. Enter a name for the format in the Grid Format Name field.
4. Complete the rest of the options as desired, and click theOK button.
5. Click the Close button.

Creating a Grid Format for Pervasive Devices

Access the JD Edwards EnterpriseOne web client.

1. Using the JD Edwards EnterpriseOne web client, launch the application for which you want to create a grid format for pervasive devices.
2. Click Customize Grid and select the format that you want to use for pervasive devices.

   If you have not 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.

Applying a Grid Format

Access a form with a grid.

On any form with a grid, select 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.

Changing a Grid Format

Your ability to change a grid format depends on whether or not your system administrator has enabled the Customize Grid option. If you do not see the Customize Grid option in the blue bar located at the top of the grid, you do not have permissions to customize the grid.

Access the application containing the grid format that you want to change.

1. Click the Customize Gridlink.
2. On Select Grid Format, select the grid format that you want to change and click theModify button.
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 the OK button.
5. Click the Close button.

Deleting a Grid Format

Your ability to delete a grid format depends on whether or not your system administrator has enabled the Customize Grid option. If you do not see the Customize Grid option in the blue bar located at the top of the grid, you do not have permissions to customize the grid.

Access a form with a grid.

1. On any form with a grid, click theCustomize Grid link.
2. On Select Grid Format, select the grid format that you want to delete and click the Delete button.

   The grid format disappears from the list.
3. Click the Close button.

Hiding or Showing Grid Columns

Access the application containing the grid you want to change.

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

Rearranging Grid Columns

Access the application containing the grid you want to change.

1. Click the Customize Grid link and either create a new format or select an existing one to modify.
2. On Customize Grid, scroll to the Display and Order section.
3. 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.
4. Repeat step 4 for any other columns that you want to move.
5. When finished, click the OK button, and then click Close.

Setting Grid Color and Font

Access the application containing the grid that you want to change.

1. Click the Customize Grid link and either create a new format or select an existing one to modify.
2. On Customize Grid, scroll to the Display and Order section.
3. Click a column name in the Display and Order list.

   The column name appears in the Selected Column field.
4. 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.
5. 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.
6. 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.
7. Click the Update Style button.

   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.
8. Repeat steps 4-8 to apply formatting to additional columns in the grid.
9. When finished, click the OK button, and then click theClose button.

Changing Grid Column Width

Access the application containing the grid that you want to change.

1. Click the Customize Grid link and either create a new format or select an existing one to modify.
2. On Customize Grid, scroll to the Display and Order section.
3. Click a column name in the Display and Order list.

   The column name appears in the Selected Column field.
4. 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.
5. When finished, click the OK button, and then click theClose button.

Changing the Sort Sequence of a Grid

Access the application containing the grid that you want to change.

1. Click the Customize Grid link and either create a new format or select an existing one to modify.
2. On Customize Grid, scroll to the Data Sequencing section.
3. 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.

4. 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.

5. 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.

6. To sort column values in ascending order, click the column name in the Sequenced Columns list and select theAscending check box.

   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.

7. When finished, click theOK button, and then click the Close button.

Exporting All Records from a Grid

You can export all records from a grid, rather than choosing a range of records to export.

1. Launch an application with a detail area, and then click the Find button to load the detail area with records.
2. Click the Tools icon, and then click the Export Grid Data menu.
3. On Export Assistant, select one of these options:
   - Export To Excel

     Note. If you select this option, select if you want to export to a new workbook, or an existing workbook.

   - Export To Word
   - Export To Comma Separated Values (CSV) File character encoding
4. Select the Export All option.
5. Click Continue.

Exporting Detail Area Content to Microsoft Excel, Word or to a Comma Separated Values File

Access an application with a grid.

1. Launch an application with a grid, and then use Find to load the detail area with records.
2. From the Tools menu, click Export Grid Data.
3. On Export Assistant, select one of these options:
   - Export to Excel

     If you select this option, select if you want to export the data to a new workbook, or an existing workbook.

   - Export to Word

- Export to Comma Separated Values

4. Select Export All to export all the data in the grid, or clear the Export All check box to export a range cells within the grid containing data that you want to export.

   If you clear the Export All check box, then you must select on the grid the range of cells you want to export. First, click the cell where you want the range to begin, then click the cell where you want the range to end.

   If you click the wrong cell, click Reset Selection.

5. Click Continue.

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

Working with Interface Features

The section provides an overview of interface features and discusses how to:

- Use Online Documentation
- Work with Error Messages and Error Dialog Boxes
- Turn Auto Populate On or Off

Understanding Interface Features

EnterpriseOne contains features that you use to globally impact the EnterpriseOne web client interface.

Error Messages and Error Dialog Boxes

When you enter information into a field that is inaccurate or unrecognizable by JD Edwards EnterpriseOne, or if you fail to enter data into a required field, the field displays a red background to indicate the error, and an error message displays at the top of the form. If there are multiple errors on one form, they will display as a list at the top of the form. You can view more information about the error by clicking the arrow located to the left of the error message. If the error message has a Go To Error link to the right of it, you can click the link and JD Edwards EnterpriseOne will place your cursor in the field that correlates to the error message.

When you place your cursor in a field that contains an error, a dialog box displays that further identifies what you must enter into the field to correct the error. You can move the dialog box by clicking the top of it and dragging it to another location on the screen. The dialog box contains a Validate button that you click to validate that the information you have entered is accurate and recognizable. You can also tab out of the field to validate the information. After the information is validated, the error message is removed from the list.

Using the dialog box, you can move to the next and previous fields that contain errors by clicking the left and right arrows in the dialog box. To view all the errors on the form listed at the top of the form, click Summary.

Auto Populate On

AutoPopulate assists you when you are performing repetitive data entry on the grid control. It uses content that already exists in the grid column to populate the cell in which you are currently typing. If the characters you are typing match those that already exist in the same column, AutoPopulate automatically adds the whole string of characters from the existing cell to the current cell. For example, you have already entered the following number into a cell in the column in which you are currently typing: 330456 If you type a 3 in the current cell, AutoPopulate will automatically place 330456 in the cell in which you are working. You can opt to accept the number by pressing tab, or you can delete the number and enter one of your own. You can turn AutoPopulate on or off. The action you select will apply to all applications to which you have access within JD Edwards EnterpriseOne.

The feature is disabled for simplified Chinese, Korean, Japanese, and traditional Chinese language environments.

Using Online Documentation

Some tasks have documentation associated with them that you can view for information about how to perform a task.

To see the task documentation, click the triangle next to the task and select 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.

You access field-level help by placing the cursor is in a field and pressing F1 or by clicking the Item Help icon located at the top-right corner of a form. If the field in which the cursor resides is a business view column, the system displays the alias name, business view name and description, table name and description, and glossary text. If the field in which your cursor resides is a data dictionary column, the system displays the alias name, the term Data Dictionary Item, and the glossary text.

Working with Error Messages and Error Dialog Boxes

To view error messages and correct errors:

1. On the application on which you are working, if there are red fields indicating errors, scroll to the top of the form and review the error messages that are displayed.
2. If the error messages you are viewing contains a Go to Error link, click the link to go to the field that correlates to the error message.
3. Enter valid information into the field.
4. Click the Validate button, or tab out of the field, to ensure that the information you entered is correct or recognizable. If it is, the dialog box disappears, the field displays a white background, and the error message is removed from the list.

Turning Auto Populate On or Off

To turn Auto Populate On or Off, from the Tools menu, click AutoPopulate. If a check mark displays beside AutoPopulate, the feature is turned on. If no check mark displays, it is turned off.

CHAPTER 4

Using JD Edwards Web Applications and Reports

This chapter provides an overview of web applications and reports and discusses how to:

- Launch an application or report.
- Launch applications in separate windows
- Send a shortcut to an application form
- Use Web application forms.
- Use detail area.
- Recover data.
- Work with search criteria

Note. If you are not using Internet Explorer as your browser, you might not have access to some of the functionality mentioned in this chapter.

Launching Applications and Reports

This section provides an overview of how to launch an application or report and discusses how to:

- Launch an application or report.
- Launch Applications in Separate Windows
- Send a Shortcut to an application form.

Understanding How to Launch an Application or Report

JD Edwards provides a variety of applications, reports, and other objects. Typically, you access these objects from the EnterpriseOne Menu.

Launching an Application or Report

Access EnterpriseOne Menu.

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, double-click the report or application.

   Applications launch immediately. If you launch a report the system launches Work with Batch Versions so you can select which version you want to run.
3. To select processing options or version for an application, click the arrow next to the task and select Values or Versions, respectively.

After you select 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 select one of these options:
   - Values
   - Versions
   - Data Selection
   - Data Selection & Values

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

Launching Applications in Separate Windows

When you open more than one application, you can select to have the application launch in the existing window, or in a new window. If you select to have it launch in the existing window, JD Edwards EnterpriseOne replaces the application on which you are currently working with the application that you have just launched. If you select to launch additional applications in new windows, then each application appears and is fully functional in its own window. Each open application is listed in the menu area of each window.

To launch applications in new windows:

1. Open an application.
2. Click New Window on the menu area.

   A new browser window will be opened, which also contains the menu area. You can launch any application in this new browser window.

Viewing Report Output

Access EnterpriseOne Menu.

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

1. In EnterpriseOne Menu, click My System Options.
2. On User Default Revisions, click Submitted Reports.
3. On Work with Servers, select the server on which the report was run.
4. Click Select.
5. On Submitted Job Search, select the report you want to view.
6. From the Row menu, click View PDF.

   The report displays in read-only, PDF format.

   To view report data on pages other than the one currently displayed, type a page number in the field located at the bottom of the PDF viewer.

JD Edwards EnterpriseOne contains a feature called Page at a Time PDF that assists in downloading large files quickly. If your system administrator has enabled this feature, you should immediately see the first page of the PDF file. If Page at a Time is not enabled, you will see a blank screen in the PDF viewer while the file downloads. If this is the case, contact your system administrator.

Changing your Password

Access EnterpriseOne Menu.

1. In 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

Sending a Shortcut to an Application Form

While you are working in the JD Edwards EnterpriseOne web client, you can email other users a shortcut to the application and form that you are looking at. The recipient double-clicks the shortcut in the email to access your current position in the software.

To send a shortcut to an application form:

1. Launch a Web application and access the form that you want to send.
2. Click Tools and select Send Shortcut.
3. On Send Shortcut, complete these fields:
   - Address Number / User / Role / Distribution List

     Note. If you are sending a shortcut to members of a distribution list, you must click the Distribution List option and then select the address book number of the distribution list. If you enter the distribution-list address-book number without choosing the Distribution List option, the shortcut will be sent only to the distribution-list address-book number and not to the members of the distribution list.
   - Mail Box

     Select which mailbox/queue you want the message to be sent to.
   - Subject

     Type the text that you want to appear in the Subject line of the email message.
4. If you want to include a message with the shortcut, type it in the large field at the bottom of the form.
5. Click OK to send the shortcut.

   The recipient will receive the shortcut using an email in the Work Center or a third-party email system, depending on the recipient's email preferences in JD Edwards EnterpriseOne.

Working with Search Criteria

This section provides an overview of search criteria and discusses how to:

- Save search criteria
- Apply saved search criteria
- Edit search criteria
- Delete search criteria

Understanding Search Criteria

You can create search criteria using the QBE and wildcard features, then save that criteria for use later. Save search criteria that you use often to find records. Your ability to save search criteria depends on how the application has been designed. The search criteria that you save is available to you only; no other user can access it.

After you have saved search criteria using the Save Query option, you can apply the criteria to your current search.

Saving Search Criteria

Access a form that contains the Save Query option.

1. Enter your search criteria in the fields and then click Save Query.
2. On Save Query, in the Saved Query Name field, type a name for the saved search criteria.
3. Click the More Options link to enter more search criteria to further narrow your search. The information that is listed as more options is determined by how the application has been designed.
4. Click Save.

Applying Saved Search Criteria

To apply criteria to your current search:

1. Access the form where you saved your search criteria.
2. From the Select a Query field, select the query that contains the search criteria you want to apply.

   JD Edwards EnterpriseOne applies the search criteria to the current form.

Editing Search Criteria

Access the form where you saved your search criteria.

1. Click Edit Queries.
2. Select the query you want to edit.
3. Edit the information.

Deleting Search Criteria

Access the form where you saved your search criteria.

1. Click Edit Queries.
2. Select the query you want delete, and click Delete.

Viewing the Data in Tables and Business Views

The section provides an overview of Data Browser and discusses how to:

- Access Data Browser.
- Search for data in tables.
- Search for data in business views.
- Use existing queries to search for data in tables and business views.

Understanding Data Browser

If you want to view the data in tables and business views, you can use Data Browser. This tool enables you to verify the existence of data in a table or business view, as well as to determine the table or business view structure. This section provides an overview about the EnterpriseOne Menu, and discusses how to:

- Access Data Browser.
- Use existing queries to search for data.
- Search for data in tables.
- Search for data in business views.
- Create personal search queries for data in tables and business views.

Accessing Data Browser

Type databrowser in the Fast Path. If you type databrowser in the Fast Path, the Query Selector form displays. If you are in an application, you can access the Data Browser by clicking the Tools menu, and then clicking Data Browser. If you access the Data Browser from an application, the Query Selector and the Data Browser forms display. The Query Selector form enables you to select queries, tables, or business views to search for data. The Data Browser form enables you to search for data for a specific table or business view. When you access Data Browser from an application, the only tables and business views on which you can search are those that correspond to the application you are in.

Searching for Data in Tables

Access the Data Browser.

1. Type databrowser in the Fast Path.
2. Select the By Table option.
3. In the Name field located under the By Table option, type the name of the table on which you want to search, or use the search button to locate a table.
4. Press Tab.

   The Data Source field automatically displays the name of the data source in which the table resides for the environment in which you are currently logged.

5. In the Data Source field, if the data source that is displayed is different than the one from which you want to search, type a new data source, or use the search button to locate a data source.
6. Click OK.

Searching for Data in Business Views

Access the Data Browser.

1. Type databrowser in the Fast Path.
2. Select the By Business View option.
3. In the Name field, type the name of the business view on which you want to search, or use the search button to locate a business view.
4. Click OK.

Using Existing Queries to Search for Data in Tables and Business Views

Access the Data Browser.

1. Select the Personal Queries or Public Queries option.

   The Personal Queries option enables you to select from a drop-down menu queries you have created for yourself. The Public Queries option enables you to choose from a drop-down menu queries that have been made available to you by a system administrator.
2. From the drop-down menu located next to the option you selected, select the query on which you want to search.
3. Click OK.

Creating Personal Search Queries to Search for Data in Tables and Business Views

Access the Data Browser.

1. Follow the instructions for Searching for Data in Tables or Searching for Data in Business Views.
2. On Data Browser, enter any filter information you want included in the query.
3. Click Save Query.
4. Click Close.

   The query is saved and displays in the Personal Queries drop-down menu.

Recovering Data

This section provides an overview of how to recover data and discusses how to:

- Retrieve all records from the database
- Voluntarily save data

- Retrieve data
- View data

Understanding how to Recover Data

You use JD Edwards EnterpriseOne web client to recover data from applications that have erred or timed out due to:

- Catastrophic errors
- Transaction failures
- Session time outs
- Voluntary save

Data saved from system failures are saved at the time when the system errors, failures, or time outs occur. The P95400 program (Application Failure Recovery Applications) enables you to access and recover data from any transaction from which you have saved data. Using P95400, you can view the data from failed transactions. You must be granted permission by an administrator to view data from applications that are not your own. For example, an administrator might give a sales department supervisor the permission to recover data from transactions performed by other users in the department. If you are unable to save data, check with your system administrator.

Retrieving All Records from the Database

Fetch All Records enables you to retrieve all records from the database that match your search criteria. JD Edwards EnterpriseOne then categorizes the records into larger groups so that you are able to view several records by scrolling through the grid, rather than having to view only ten at a time. The default number of records in a group is 200.

To fetch all records, click the Go to End button located on the blue bar on the grid.

Voluntarily Saving Data

Your ability to save data voluntarily depends on whether or not your system administrator has this feature enabled or disabled. Access an application in which you have entered data.

1. Click Tools, then select one of these options:

   Save

   Save As

2. On Select Application Failure Header Label, select the check box if you want the JD Edwards EnterpriseOne to assign a label to the data you are saving. To manually enter a label and description, clear the box and enter a label and description in the respective fields.

   Note. The label is a name you assign the data, like a filename. The description is a brief explanation that helps you identify what the data is.

   ---

3. Click OK.

   JD Edwards EnterpriseOne saves the data you have entered in the application.

Retrieving Data

Access the P95400 application.

1. On Work with Application Failure Records, search for data using these criteria:

   From Saved Date and To Saved Date Type the dates between which the data for which you are searching was saved.

   If you select one of the following options in addition to the dates you have entered in these fields, JD Edwards EnterpriseOne retrieves the data saved within the dates, and that matches the search criteria you specify.

   View All

   Click this option to view all of the data that was saved, including system failures, time outs, or voluntary saves.

   View Failures

   Click this option to view only that data that was saved due to system failure.

   View Saves

   Click this option to view only that data that was saved voluntarily.

   View Timeouts

   Click this option to view only that data that was saved because the system timed out.

2. Click Find.

   JD Edwards EnterpriseOne retrieves the data that matches the search criteria you entered.

3. Click the record that contains the data you want to save.

   On Saved Application Data, click the record or records containing the data you want to view.

Note. Each record is a form within the application where data was saved. If no data was saved on the form, either because it was not saved voluntarily, or because there was no data added to it---as in a Search/Browse form---you will see an N in the Data Saved (Y/N) column.

Viewing Data

After you have retrieved data, you view the information contained in the records.

1. Retrieve the data you want to view.
2. Select a record from the bottom grid, and then click View Data.

   The information contained in the record displays in a read-only format.

Working with Tasks, User Options, and the Calendar

The section discusses how to:

- Filter tasks by role.
- Use task profiles.
- Work with user options.

- Access the calendar.

Filtering Tasks by Role

You filter the tasks that you see by selecting a role. Each role contains its own set of tasks. When you log into JD Edwards EnterpriseOne using the *ALL role, you now see only those tasks associated with a single role rather than a concatenation of all tasks associated with all roles.

In the Web client, you view the other roles assigned to you by choosing the role from the Role drop-down menu located on EnterpriseOne Menu, and then clicking 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.

Using 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 select 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.

Working with 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 JD Edwards 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 JD Edwards EnterpriseOne.
Default Printer	Launches the Printer Application program (P98616). Only system administrators should change default printer settings.

Accessing the Calendar

The calendar enables you to enter and view time sensitive information, such has meetings and appointments. Depending on the permissions your system administrator has assigned you, you can view, add, delete, and modify activities listed in the calendar. You can view the calendar one day at a time, by the week, or by the month. Your system administrator determines the calendar view that you see.

This section discusses the default features and functionality that are available in the calendar. You might not see some of these features or might not be able to perform some functions due to your permissions. The default view for the calendar consists of one large calendar on the left with a Day tab, a Week tab, and a Month tab. Three small calendars are located on the right side. The first small calendar shows the month previous to the month displayed in the large calendar. The second calendar shows the month displayed in the large calendar. The third calendar shows the month following the month displayed in the large calendar. Today's date is highlighted in a yellow box in the appropriate small calendar.

The large calendar and the three small calendars are fully interactive. Clicking in any calendar automatically adjusts the other calendars. For example, if you select a week in the large calendar, the week will be selected in the corresponding small calendar as well.

You can double click in the large calendar to add an activity, if you have appropriate permissions. If you are adding an activity on the Day tab, double clicking on a time line automatically assigns a 30 minute time slot, which you can change. Clicking on the time located at the beginning of the line automatically assigns a 1 hour time slot, which you can change as well. If you your calendar displays an activity that exceeds 24 hours, the activity displays in the All Day row at the top of the large calendar. The calendar automatically adjusts across time zones. For example, if someone schedules a meeting for 8:00 a.m. Pacific time, the activity will appear at 10:00 a.m. Central time.

To access the calendar, type P01301 in the Fast Path.

CHAPTER 5

Understanding Messages and Queues

This chapter provides an overview of messages and queues and discusses:

- Internal and External messages
- Workflow messages
- Queues

Messages and Queues Overview

With JD Edwards EnterpriseOne, you can send and receive electronic mail (email) messages through the Work Center program. The JD Edwards EnterpriseOne email system includes messages sent by users and messages sent by a workflow process.

You can organize your messages by placing them into queues (storage areas for your messages) provided by the software or by setting up your own queues. This section explains how to work with your messages and with your queues. In addition, you can indicate your work-time location and add remarks to your time log.

Internal and External Messages

JD Edwards EnterpriseOne sends your email messages in different ways, depending upon whether the message is internal or external to the system.

Internal Messages	Internal messages stay within the JD Edwards EnterpriseOne system. They are read using the Work Center.
External Messages	External messages are sent to third-party email software packages such as Microsoft Outlook or Lotus Notes.

You system administrator configures your JD Edwards EnterpriseOne user account to receive either internal or external email. However, certain messages are sent as internal email regardless of this preference; for example, notifications of submitted UBE jobs.

Workflow Messages

In addition to sending and receiving internal and external messages, you can receive an active message, which is a type of message that a system workflow process automatically sends to a recipient.

Active Messages	Workflow processes sometimes generate messages that require you to take action, such as approving or rejecting a change to a customer record. A lightning bolt button identifies an active message. Active messages contain a shortcut button that links directly to an application. When you click the shortcut button, the system retrieves the most current information from the database, which ensures that you get accurate information even if changes are made after an active message is sent to you. You can set up a workflow process to send active messages to specific queues.

Queues

Queues are storage areas that enable you to organize messages using the Work Center. For example, messages can be organized into queues for priority mail or for submitted jobs. Through a queue, users can approve or reject specific tasks in a workflow process. A queue is actually a UDC, and you set up a queue in the same way that you would set up a UDC.

Queues Provided with JD Edwards EnterpriseOne

JD Edwards EnterpriseOne provides these queues:

Sent	Messages that you have sent to others.
Deleted	Messages that you have deleted. After you delete a message, you can view it but you cannot move it to another queue. The system administrator has the authority to purge deleted messages from the system, which is typically done periodically or on a predetermined schedule. You can also remove a message from the system by deleting it from your Deleted queue.
Submitted Jobs	Messages generated by the system for jobs that you have submitted for batch processing, such as the General Ledger Post.

Workflow Queues

Workflow includes several predefined queues, but you might want to set up a custom queue for messages generated by processes that you create. For example, you might want to set up a queue for messages generated by a credit limit approval process. This queue would gather any approval or rejection messages related to credit limits for customers. A user could then open that queue and act on the message contained within it.

CHAPTER 6

Working with Messages

This chapter discusses how to:

- Send messages
- Work with shortcuts
- Use the Work Center
- Print messages

Sending Messages

This section provides an overview of sending messages and discusses how to:

- Send an internal message to a single recipient.
- Use a quick list to send a message to multiple recipients.
- Send a message to members of a role.

Understanding How to Send Messages

When you send internal email messages, you send them to other users within JD Edwards EnterpriseOne software. You can control the time of delivery for a message by assigning a tickler date to the message. A tickler date is a date in the future when the system will automatically show the message. Assigning a tickler date is especially helpful if you plan to be out of the office on the day that you want others to receive your message, or if you want to remind yourself about upcoming meetings or other obligations.

When you send internal messages, you can also include an attachment. Attachments enable you to include files, images, or links that conform to the OLE standard, such as word processing documents and spreadsheets.

You can send messages to one or more recipients. If you are sending a message to multiple recipients, you can use a quick list, a predefined distribution list, or a role.

See Also

Chapter 5, "Understanding Messages and Queues," page 31

Forms used to Send an Internal Message to a Single Recipient

Form Name	FormID	Navigation	Usage
Send Internal Message	W012505A	From any application, click theTools button, then click Send Shortcut.	Send a non-workflow shortcut.

Sending an Internal Message to a Single Recipient

Access any application in JD Edwards EnterpriseOne.

1. From any application, click the down arrow on the hyper-button, select Tools, Send, and then select Internal Mail.
2. On Send Internal Mail, click the Search button in the "Send To Address Number / User / Role" field.
3. On Address Number / User / Role, select one of the following options to search for a recipient by address number or user ID, and then click OK:
   - Address Number
   - User
4. Highlight the row that contains the recipient and then click Select.
5. Type the subject of the message in the Subject field.
6. Complete the following optional fields, as necessary:
   - Type
   - Mail Box
   - Marketing
   - Lead Source
   - Keep Copy
   - Receipt Notify
   - Address
   - Contact
   - Tickler Date
   - Phone Number
7. Type your message in the text area at the bottom of the form.
8. To include an attachment with your message, right-click the panel with the Text button.
9. Choose New, and then one of these options:
   - Image
   - OLE
   - Shortcut
   - URL/File
10. Click OK to send the message.

The system returns you to the previous application. If you opt to keep a copy of a message that you send, you can view it in the same queue from which you sent the message.

Using a Quick List to Send a Message to Multiple Recipients

Access any application in JD Edwards EnterpriseOne.

1. From any application, click the down arrow on the hyper-button, select Tools, select Send, and then select Internal Mail.
2. On Send Internal Mail, select Quick List from the Form menu.
3. On Quick List, complete either of the following fields for each person you want on the list, and then click OK:
   - Alpha Name
   - Address Number
4. Follow the steps for sending an internal message to a single recipient.

Note. You cannot save a quick list.

Sending a Message to Members of a Role

Access any application in JD Edwards EnterpriseOne.

1. From any application, click the down arrow on the hyper-button, select Tools, select Send, and then select Internal Mail.
2. On Send Internal Mail, click the Search button in the "Send To Address Number / User / Role" field.
3. On Address Number / User / Role, select the Role option, and then click OK.
4. Highlight the row that contains the role that you want to use and then click Select.
5. Follow the steps for sending an internal message to a single recipient.

Working with Shortcuts

This section contains an overview of working with shortcuts and discusses how to send a non-workflow shortcut.

Understanding Shortcuts

With the JD Edwards EnterpriseOne messaging system, you can send messages that contain a shortcut to a JD Edwards EnterpriseOne application. When you send a shortcut, you can preface it with a message for the recipient to review and approve. For example, you might want your manager to approve a change that you made to a customer record. After sending a shortcut to your manager, he or she can view the record immediately by clicking the shortcut button. When you send a shortcut, the system sends the key for that particular record to the recipient. When the recipient clicks the shortcut button, the system opens the application and retrieves the record.

The JD Edwards EnterpriseOne system uses workflow to automatically send messages with a shortcut to an application. These types of messages, called active messages, require that the recipient open the shortcut to verify information or approve a transaction.

Since JD Edwards EnterpriseOne software supports Windows and Web clients, the message can contain a shortcut for a Windows application or a Web application.

Form Used to Send a Non-Workflow Shortcut

Form Name	FormID	Navigation	Usage
Send Shortcut	W012505A	From any application, click theTools button, then click Send Shortcut.	Send a non-workflow shortcut.

Sending a Non-Workflow Shortcut

From the application from which you want to create a shortcut, access any records you want the recipient to view.

1. Click the down arrow on the hyper-button and select Tools, and then Send Shortcut.

   The Send Shortcut form appears with a shortcut to the application.

2. On Send Shortcut, complete these fields:
   - Address Number / User / Role / Distribution List
   - Mail Box (Internal Messages Only)
   - Subject
3. Type your message.
4. Click OK to send the message.

Using the Work Center

This section provides an overview of the Work Center and discusses how to:

- View messages.
- Revise messages.
- Move a message to another queue.
- Redirecting messages to the Priority or Secondary queue.
- Cancel the delivery of messages.
- Reassign messages.
- Delete messages.
- Print messages.
- Print a report that lists all messages in a queue

Understanding the Work Center

Use the Work Center to send and receive internal email messages within the JD Edwards EnterpriseOne system. Work Center enables you to perform standard email functions.

View Messages

You can view your messages in the Work Center. Messages sent from other users will appear in either your Personal In Basket queue or, if you set them up, your Priority Mail and Secondary queues. You can also view workflow messages, or active messages, sent by a workflow process.

Note. If you cannot view messages, make sure that queue security is set up to enable you to view the Address Book number and queue that you want to view.

Revise Messages

You can revise the text of messages in any of your queues. This feature opens up the actual message and enables you to change the text or add new text.

Move a Message to Another Queue

You can move a message from one queue to another. For example, you might want to move a message from your Priority queue to your Personal To Do List queue.

Redirect Messages to the Priority or Secondary Queue

You can redirect messages that you receive from an individual to your Priority Mail queue. When you do this, the system sends all future messages from that individual directly to your Priority Mail queue. Alternatively, you can redirect messages from an individual to your Secondary queue.

To redirect messages to the Priority Mail or Secondary queue, you must follow these steps and not the ones for moving messages. Moving messages only moves individual messages, whereas redirecting messages to the Priority Mail or Secondary queue affects all messages from that user until you remove the designation.

Although you can move a message to the Archived or Deleted queue, the system does not redirect future messages from the sender to that queue. You must manually move the sender's message to the Archived or Deleted queue each time.

You can redirect messages from more than one person to your Priority Mail and Secondary queues. You can also prevent messages from being delivered to a specific queue.

Cancel the Delivery of Messages

If you decide that you no longer want the system to automatically redirect messages from an individual to a Priority Mail queue, you can cancel the automatic delivery of messages to your Priority Mail or Secondary queue.

Reassign Messages

The messaging system enables you to reassign a message to another user after the message is sent to the original recipient. This process changes whose queue the message appears in. For example, if you originally sent a message to Jim, you can reassign that message to Betty. The message will now be in Betty's queue and will not be in Jim's queue. You can also reassign messages that you receive.

You can only reassign messages in other users' queues if your queue security enables.

Delete Messages

You cannot recover a message after you move it to the Deleted queue. It remains in your Deleted queue until your system administrator purges messages, which is typically done on a periodic or predetermined schedule. Alternatively, you can remove a message from the system by deleting it from your Deleted queue.

Forms Used to Access the Work Center

Form Name	FormID	Navigation	Usage
Employee Work Center - Work Center	W012503F	In the Fast Path, type G02.	Send and receive internal email.
Employee Work Center - Address Number / User / Role	W012503D	On Employee Work Center - Work Center, click the search button located beside the Address Number / User / Role field.	Select the default value you want displayed when you access Work Center.
Employee Work Center - Address Book Search Without Private Data	W0101SXA	On Employee Work Center - Address Number / User / Role, click OK.	Search for records by address number, users, or roles.
Address Book Master Search	W0101SA	On Employee Work Center - Address Book Search Without Private Data, select a record and click Search.	Look up address book numbers.

Viewing Messages

Access any application.

1. Click the down arrow on the hyper-button and select Tools, and then Work Center.
2. On Work Center, expand a queue that contains a message.

   Unless the All Queues check box is selected, only those queues that contain mail will display. Any messages in that queue appear. Messages that have not been viewed appear in bold.
3. Click the message that you want to view.

   The message appears in the view area on the right side of the Work Center form.

Revising Messages

Access any application.

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select the message that you want to revise.
3. From the Row menu, select Message Revisions.
4. On the Message Revisions form, change any of the following fields and then click OK:
   - From
   - Contact
   - Subject

- Phone Number
- Tickler Date
- Text area

Moving a Message to Another Queue

Access any application:

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, click the All Queues option if the target queue to which you want to move the message does not appear.
3. Click and drag the message to the target queue.
4. To verify the placement of the message, double-click the target queue and view the contents.

Redirecting Messages to the Priority or Secondary Queue

Access any application.

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select the message that you want to redirect to your Priority Mail or Secondary queue.
3. From the Row menu, select one of these options:
   - Priority
   - Secondary
4. Expand the target queue to verify the placement of your message.

   Any further messages that you receive from this sender will arrive in the queue that you selected. Repeat these steps for redirecting other users' messages.

Canceling the Delivery of Messages

Access any application:

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select a message from the user for which you want to cancel automatic delivery.
3. From the Row menu, select Remove.
4. Move any other messages from this particular sender out of the Priority Mail or Secondary queue.

   As long as you keep any messages in your Priority Mail or Secondary queue from the sender whom you removed, future messages from that sender will appear in that queue.

Reassigning Messages

Access any application:

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select the message that you want to reassign, and then, from the Row menu, select Reassign.
3. On Assign Message, complete these fields and click OK:

- Address Number / User / Role
- Queue Designator

Deleting Messages

To delete a message, drag the message to the Deleted queue. Alternatively, select the message and click Delete.

Printing Messages

This section provides an overview of message printing and discusses how to:

- Print a message.
- Print a report that lists all messages in a queue.

Understanding Message Printing

You might find that you want a printed copy of a message for your records. You can do either of these tasks:

- Print a message

  You can print a message from any of your queues.

- Print a report that lists all messages within a queue

  This report includes a summary for each message. The two types of message reports are:

- Message Center - Summary
- Message Center - Detail

  These reports show the sender and recipient of the message, as well as the subject of the message. The detail report shows the content of each message.

Printing a Message

Access any application in JD Edwards EnterpriseOne.

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select the message that you want to print.
3. From the Row menu, select Print.
4. On Printer Selection, click OK.

Printing a Report that Lists All Messages in a Queue

Access any application in JD Edwards EnterpriseOne.

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select the message queue that you want to print.
3. From the Form menu, select Print.
4. On Work with Batch Versions - Available Versions, select the version and submit the report.

CHAPTER 7

Working with Queues

This chapter provides an overview of working with queues and discusses how to:

- Set up queues.
- Log time and add remarks.

Understanding Queues

Queues are a way to group related messages together in the Work Center. This topic describes how to manage your queues by creating new ones or adding security. As with a message, you can also add a shortcut to a queue.

You set up queues in the system as UDCs. The following task describes how to create queues or modify existing queues.

Setting Up Queues

This section discusses how to:

- Set up a queue.
- Specify the queues that a user can view.
- Changing a user’s queue security.

Setting Up a Queue

Access the Work With User Defined Codes form.

1. On Work With User Defined Codes, click Add.
2. On User Defined Codes, complete the following fields in an empty row on the grid and click OK:
   - Codes

     Enter a unique number for the queue.
   - Description 1

     Enter a name for the queue.
   - Description 2
   - Special Handling

- Hard Coded

  Enter N in this field.

Codes	A list of valid codes for a specific user defined code list.
Description 1	A user defined name or remark.
Description 2	Additional text that further describes or clarifies a field in the system.
Special Handling	A code that indicates special processing requirements for certain user defined code values. The value that you enter in this field is unique for each user defined code type. The system uses the special handling code in many ways. For example, special handling codes defined for Language Preference specify whether the language is double-byte or does not have uppercase characters. Programming is required to activate this field.
Hard Coded	A code that indicates whether a user defined code is hard-coded. Values are: Y The user defined code is hard-coded N The user defined code is not hard-coded A check mark indicates that the user defined code is hard-coded.

Specifying the Queues that a User Can View

You can change the security status for a user or group of users within a queue. You can either give a user authority to monitor every queue within a group, or you can deny users access to certain queues.

You can add security by user, distribution list, or role. For example, you might want to set up security so that a manager can monitor all messages within certain queues. Or you might set up security by distribution list or role so that users within the group have authority to monitor certain queues.

If you want to give only a few people within a distribution list or a role access to certain queues, you enter the distribution list or the role, and then enter the users' address book numbers to define which queues those users in the group can access.

Access the Work With Workflow Message Security form.

1. On Work With Workflow Message Security, click Add.
2. On Workflow Message Security Revisions, complete these fields:
   - User
   - Group/Role
3. Specify the queues that a user can view by completing the Authority Y/N field and clicking OK.

User	A user in the workflow system. This can also be a group.
Group/Role	A group or list of users in the workflow system. The address book number that identifies a list of users in the workflow system.

Authority Y/N	Indicates whether the user is authorized to make changes to security information. --- FORM SPECIFIC --- For workflow, indicates whether the user can view other queues in the Work Center.

Logging Time and Adding Remarks

This section provides an overview of the Work Center monitoring features and discusses how to:

- Check in and out.
- Enter remarks.
- View time logs.

Understanding Work Center Monitoring

The Work Center enables you to inform others of your whereabouts. You can specify when you are in or out of the office by using the Check In and Check Out options. You can add remarks to your check out to provide detailed information about where you are. You can view this information from the Time Log form.

Checking In and Out

Checking in and out informs others of your whereabouts. When you check out, you can also enter a remark, return date, and return time. If you do not enter a remark, the system supplies the word*home*. If you do not enter a return date, the system enters the next business day. The check in and check out information that appears on the Time Log form is discussed later in this topic.

Access the Work With Employee Queue Manager form.

1. On Work With Employee Queue Manager, locate and select your record.
2. From the Row menu, select one of these menu options:
   - Check In
   - Check Out

   Each time you select Check In or Check Out, the system updates your status, which you can view from the Time Log.

Entering Remarks

You can enter a remark to provide more information about your whereabouts, your schedule, and so on. For example, you might enter a remark indicating that you are in a meeting, on vacation, or can be reached at a particular phone number. You can update an existing remark.

Access the Work With Employee Queue Manager form.

1. On Work With Employee Queue Manager, locate and select your record.
2. From the Row menu, select Remark.
3. On the Check In/Out and Update Remark form, select the Update Remark option.

4. Enter your remark in the Remark field.
5. The following fields in the Return area are optional; complete them if necessary:
   - Return Time
   - Return Date
6. Click OK.
7. To view your remark, click Find on Work With Employee Queue Manager.

Viewing Time Logs

You can view the times when you or other employees check in and out, and you can view any remarks.

Access the Work With Employee Queue Manager form.

1. On Work with Employee Queue Manager, select the employee record time log that you want to view.
2. From the Row menu, select Time Log.

CHAPTER 8

Working with Media Object Attachments

This chapter provides an overview of media object attachments and discusses how to:

- Work with media objects.
- Attach media objects.
- Search for media objects.
- Work with templates.
- Work with properties.
- Work with metadata.
- Attach OLE objects at the baser for level.

Understanding Media Object Attachments

JD Edwards EnterpriseOne software media objects and imaging features enable you to attach useful information to an application, including information that might currently exist as a paper-based document. The media objects feature enables you to attach the information to JD Edwards EnterpriseOne software applications, forms and rows, and Object Librarian objects. The imaging feature within media objects gives you the flexibility to create an efficient method of information storage.

Use media objects to link information to applications, either to individual rows in a grid or to a form. The following list discusses the types of information that you can attach to a grid row or form:

Information	Description
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, Graphics Interchange Format (GIF) files, and Joint Photographic Experts Group (JPG) files. These files might represent electronically created files as well as scanned images of paper-based documents.

Information	Description
Object Linking and Embedding (OLE)	Media objects can be files that conform to the OLE standard. OLE enables you to create links among different programs. Using these links, you can create and edit an object from one program through a different program. JD Edwards 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 in 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 application to which the OLE links is the path to the supporting file. You can only use OLE objects that you properly register and install as OLE objects through Windows.
JDE shortcuts	A JDE shortcut is a link that opens a JD Edwards EnterpriseOne software application. Within media objects, you can only attach JD Edwards EnterpriseOne software shortcuts; you cannot attach shortcuts to third-party applications.
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.

System administrators can set up templates that might include their own attachments, such as images and shortcuts. For example, you can create a letterhead and a standard form for a memo. Also, you might create a shortcut, to be included in the template, that provides access to an application that uses data specific to the information that you add to the template.

Each time you save a media object, whether it is a new media object, or whether you have modified an existing one, EnterpriseOne timestamps the media object with your user ID, the date, and time. This information displays in the upper right corner of the media object. The information that displays is retrieved from the Enterprise server, so if your Enterprise server resides in a different time zone, the time and date that displays will be different than the time zone in which you are working. For example, if you work in the Eastern time zone, but the Enterprise server you are using resides in the Pacific time zone, the date and time that is recorded when you save the media object will be Pacific time.

Note. If you open a Microsoft Excel OLE media object, place the cursor in the spreadsheet, then click Save, EnterpriseOne timestamps the media object even if you have not made changes.

Working with Media Objects

This section provides an overview of working with media objects and discusses how to:

- Check for attachments
- Check for attachments for a single row or a range of rows

Understanding how to Work with Media Objects

You can use the Media Objects feature to add text, graphics, and other objects to forms and records. For example, you can use a text attachment to explain special circumstances surrounding a journal entry. Or you can attach drawings, animations, and other types of objects to forms and records. A pop-up menu provides access to established templates for attachments and an option to set the properties for the Media Objects form.

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 detail form that contains data for Order Number 2002, this attachment does not appear on the detail form that appears when you access data for Order Number 3003. The base form, which in this case is a detail 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.

JD Edwards EnterpriseOne software supports Object Linking and Embedding (OLE). OLE enables you to create links among different programs. Using these links, you can save an object from one program into a different program. The system provides the links that you need to attach OLE objects. You can attach OLE objects as media objects and at the base form level. When you attach an object at the base level of the form, you attach the object to the form and not to any data that might appear in the form.

If attachments exist for a form, a paper clip button 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 button appears at the right of the status bar.

When a form first opens, grid rows do not indicate whether attachments exist for the corresponding records. You can perform a search on every record that the system loads onto your workstation or you can search each record to determine whether attachments exist for records.

The Text feature includes a word processor that lets you create, view, edit, and delete notes. When you create a text attachment, you can also set up templates. You can use templates to create a format for a frequently used media object.

Checking for Attachments

To find out whether an attachment exists for a record, you must first perform a search on the record. You can perform this search on one record or on a number of records simultaneously. The system only searches for attachments on records that you load onto your workstation. For example, when you initially click the Find button to locate a number of records, only the records that appear in the grid exist on your workstation. Use the page buttons to view more records.

When you click the Find button to refresh the records in the grid or to display new records, the form resets the attachments view status. You must click the find attachments button again to display the attachments for the grid records.

Access a form with the attachments feature available.

To check for all attachments:

On a form with the attachments feature available, click the Checking for Attachments button to the left of the row of column titles. This button looks like a paper clip overlapping a magnifying glass.

A paper clip button appears in the row header for each loaded record with an attachment.

Checking for Attachments for a Single Row or a Range of Rows

Access a form with the attachments feature available.

1. On a form with the attachments feature available, hold the cursor over the row header for the grid row.

If an attachment exists for the row, a paper clip button appears in the row header.

2. Move the cursor up or down in the row header column to search for attachments for adjacent rows.

Attaching Media Objects

This section provides an overview about attaching media objects and discusses how to:

- Attach text
- Attach and image
- Attach an OLE object
- Attach a shortcut
- Attach URL or file

Understanding how to Attach Media Objects

Use the Attachments feature to attach text, photos, drawings, spreadsheets, video images, sounds, and application shortcuts to forms and grid rows. For example, you might attach the image of an invoice to a data entry record, attach a legal document to a record that describes a contractual agreement, or attach text that describes a process on a form. The attachments feature is not available on all forms.

Note. You cannot create attachments until an administrator has established and mapped media object queues as described in Media Objects and Imaging in the System Administration Guide.

When you enter text, you can format the paragraphs and run a spell check. JD Edwards EnterpriseOne software also supports object linking and embedding (OLE).

Attaching Text

Access a form with the attachments feature available.

1. On a form where attachments are available, do one of these tasks:
   - To attach text to a form, from the Form menu, select Attachments.

     If attachments exist for the form, click the paper clip button to the right of the status bar.
   - To attach text to a grid row, select the row and then, from the Row menu, select Attachments.

     The Media Objects workspace is split into two panels. The left panel is the button panel and the right panel is the viewer panel. Icons for any files previously attached to the record appear in the button panel.
2. Do one of these tasks:
   - From the File menu, select New, and then Text.
   - In the button panel, click the right mouse button, select New, and then select Text from the pop-up menu.
3. In the viewer panel, type the desired text.
4. When you finish, from the File menu, select Save and Exit.

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

Attaching a File

Access a form where attachments are available.

1. On a form where attachments are available, do one of these tasks:
   - To attach an image to a form, from the Form menu, select Attachments.

     If attachments exist for the form, click the paper clip button to the right of the status bar.
   - To attach an image to a grid row, select the row and then, from the Row menu, select Attachments.
2. On Media Objects, do one of these tasks:
   - From the File menu, select New and then Image.
   - In the button panel, click the right mouse button, select New, and then select Image from the pop-up menu.
3. Complete these options:
   - Queue Name
   - Files of Type

     The Preview option contains a default check mark to display a sample of the selected image. Toggle this option to display or hide the preview image.
4. Choose an image, and then click OK.

   If the system supports the graphic format, the image appears in the viewer panel.
5. When you finish, from the File menu, select Save and Exit.

Field	Explanation
Queue Name	The name of the directory where the image file exists.
Files of Type	The list of file extensions that the system supports. For example, file types might include .bmp for a Windows bitmap, .gif for a graphics interchange format file, and .jpg for a joint photographic experts group file.

Attaching an OLE Object

Access a form where attachments are available.

1. On a form where attachments are available, do one of these tasks:
   - To attach an OLE object to a form, from the Form menu, select Attachments.

     If attachments exist for the form, click the paper clip button to the right of the status bar.
   - To attach an OLE object to a grid row, select the row and then, from the Row menu, select Attachments.
2. On Media Objects, do one of these tasks:
   - From the File menu, select New and then OLE.
   - In the button panel, click the right mouse button, select New, and then select OLE from the pop-up menu.
3. On Insert Object, to create a new object, select an object type and click OK.

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

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

   Depending on whether you create an object or attach an existing object, the application associated with the object displays in the viewer panel either a blank workspace or the existing 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 Excel menus display on the menu bar.
6. On Media Objects, edit the object in the viewer panel as necessary.
7. When you finish, from the File menu, select Save and Exit.

Attaching a Shortcut

Access a form where attachments are available.

Include a shortcut to provide access directly from a record to an associated application.

1. On a form where attachments are available, do one of these tasks:
   - To attach a shortcut to a form, from the Form menu, select Attachments.

     If attachments exist for the form, click the paper clip button to the right of the status bar.
   - To attach a shortcut to a grid row, select the row and then, from the Row menu, select Attachments.
2. On Media Objects, do one of these options:
   - From the File menu, select New and then Shortcut.
   - In the button panel, click the right mouse button, select New, and then select Shortcut from the pop-up menu.
3. On Open, browse through your files, select the appropriate shortcut, and click Open.

   Your shortcut appears in the viewer panel.
4. When you finish, from the File menu, select Save and Exit.

Attaching a URL or File

Access a form where attachments are available.

Attach a URL to provide access to a Web page or a file on a disk. You can also attach file types that cannot be attached as images or OLE files, such as bitmaps.

1. On a form where attachments are available, do one of these tasks:
   - To attach a URL or file to a form, from the Form menu, select Attachments.

     If attachments exist for the form, click the paper clip button to the right of the status bar.
   - To attach a URL or file to a grid row, select the row and then, from the Row menu, select Attachments.
2. On Media Objects, do one of these tasks:
   - From the File menu, select New and then URL/File.
   - In the button panel, click the right mouse button, select New, and then select URL/File from the pop-up menu.
3. On Add URL/File, browse your files or queues, select the appropriate URL or file, and click Open.
   You can also type a URL in the field.

4. Click OK.

   Your URL or file appears in the viewer panel. If you are attaching a URL, a download dialog box appears. You can either verify that the URL is active or you can click Cancel.

5. When you finish, from the File menu, select Save and Exit.

Searching for Media Objects

This section provides an overview of searching for media objects and discusses how to:

- Search for a media object
- Rename attachments
- Delete media objects

Understanding how to Search for Media Objects

You can search for a specific media object in the system by using information such as creation date, alternate keys, or UDCs.

Note. You can only search for media objects that already have codes defined for them and that your system administrator has made available to all users in the system.

Searching for a Media Object

Access a form where attachments are available.

1. On a form where attachments are available, do one of these tasks:
   - To search for a media object to attach to a form, from the Form menu, select Attachments.

     If attachments exist for the form, click the paper clip button to the right of the status bar.
   - To search for a media object to attach to a grid row, select the row, and then from the Row menu, select Attachments.
2. On Media Objects, do one of these tasks:
   - From the File menu, select New and then Search.
   - In the button panel, click the right mouse button, select New, and then Search from the pop-up menu.
3. On Media Object Search, complete the Type field and click Find.

   Enter the type of media object attachment for which you are searching. You can use the Query by Example line to limit your search.

   Only attachments with defined metadata appear.
4. Choose an attachment and click Select.

   Your media object appears in the viewer panel.
5. When you finish, from the File menu, select Save and Exit.

Renaming Attachments

When you add an attachment, the system displays its filename under its button in the button panel. You can rename the button to make it more meaningful to other users if you want.

Access media objects.

1. On Media Objects, select a button and do one of these tasks:
   - From the File menu, select Rename.
   - In the button panel, click the right mouse button and select Rename from the pop-up menu.
2. Type a new name for the button and then click anywhere on the form.

Deleting Media Objects

When you no longer need an attachment, use the Delete feature on Media Objects to remove the object. When you delete text, the text is permanently erased. When you delete images and OLE objects, you remove the attachment of the file to the record. The system continues to store a file for the object.

Access a form where attachments are available.

1. Complete one of these tasks:
   - To delete an attachment to a form, from the Form menu, select Attachments.

     If attachments exist for the form, click the paper clip button to the right of the status bar.
   - To delete an attachment to a grid row, select a row with a paper clip button, and then, from the Row menu, select Attachments.
2. On Media Objects, select the appropriate button in the button panel and then select Delete from the File menu.
3. On Confirm Media Object Delete, click Yes to confirm the deletion.

   The button disappears from the button panel.
4. When you finish, from the File menu, select Save and Exit.

Working with Templates

This section discusses how to:

- Create a template
- Attach a template
- Modify a template
- Delete a template
- Delete a template with media objects

Creating a Template

On Media Objects, you can access the Work With Media Objects Templates form. On this form, you can attach, create, modify, and delete templates to help you format your text attachments.

Access a form where attachments are available.

1. Select the row from which you want to attach a template, and then select Attachments from the Row menu.
2. On Media Objects, in the button panel, click the right mouse button and select Templates from the pop-up menu.
3. On Media Objects Template, click Add.
4. On Media Object Template Revisions, complete these fields, and then enter your template information into the workspace:
   - Template Name
   - Description
5. Click Add.

Attaching a Template

Access a form where attachments are available.

1. Select the row to which you want to attach a template, and then select Attachments from the Row menu.
2. On Media Objects, in the button panel, click the right mouse button and select Templates from the pop-up menu.
3. On Work With Media Object Templates, click Find.

   You can use the query-by-example line to refine your search.
4. To preview the template, double-click the paper clip button in the row header.
5. Choose the grid row for the template that you want to attach, and then click Select.
6. The template appears in the workspace on Media Objects.

Modifying a Template

Access a form where attachments are available.

1. Select the row from which you want to modify a template, and then select Attachments from the Row menu.
2. On Media Objects, in the button panel, click the right mouse button and then select Templates from the pop-up menu.
3. On Work With Media Object Templates, click Find.

   You can use the Query by Example line to refine your search.
4. Choose the grid row for the template that you want to modify and then click Select.
5. On Media Objects, modify the template as necessary and then from the File menu, select Save and Exit.

Deleting a Template

Access a form where attachments are available.

1. Select the row from which you want to delete a template, and then select Attachments from the Row menu.
2. On Media Objects, in the button panel, click the right mouse button and then select Templates from the pop-up menu.
3. On Work With Media Object Templates, click Find.

You can use the Query By Example line to refine your search.

4. Choose the grid row for the template that you want to delete, click Delete, and then on Confirm Delete, click OK.

Deleting a Template on Media Objects

Access a form where attachments are available.

1. Select the row from which you want to delete a template, and then select Attachments from the Row menu.
2. On Media Objects, in the button panel, select the text button for the template, and then select Delete from the File menu.
3. On Confirm Media Object Delete, click Yes.

   The template and the text button disappear.

Working with the Properties of Media Objects

This section discusses how to:

- Set media object properties
- Set text properties
- Set image properties
- View OLE properties
- Set shortcut properties

Setting Media Object Properties

The pop-up menu that appears when you click the right mouse button in the button panel on Media Objects provides you with the option to view and, for some objects, to change the properties of an object. Each object has unique properties.

In addition, you can define metadata for an object. Metadata contains information about the object, such as a description of the object, who created it, and when it was created. Other users can search for the object based on this information.

Access Media Objects.

1. On Media Objects, in the button panel, click the right mouse button and then select Properties.

   The form or row must contain an attachment in order to access the Media Objects properties.
2. On Properties, review the "Technical information about the key for the form" on the Key Information tab.
3. Click the Flags tab and review this information:
   - Allow Text Items
   - Allow Image Item
   - Allow OLE Items
   - Allow RTF Text

- Show Text Item On Open
- Read Only

Setting Text Properties

Access Media Objects.

1. On Media Objects, in the button panel, click the right mouse button over a text button, and then select Properties from the pop-up menu.
2. On the text properties form, review these fields on User Audit Information:
   - Created by
   - Date Created
   - Time Created
   - Updated By
   - Date Updated
   - Time Updated
3. Click the Printing Information tab and then do the following, if necessary:
   - Click the Check to print before report item option
   - Complete the Effective From field
   - Complete the Effective To field

Setting Image Properties

Access Media Objects.

1. On Media Objects, in the button panel, click the right mouse button over an image button, and then select Properties from the pop-up menu.
2. On the Image Properties tab, review these fields:
   - File Name
   - Queue Name
   - Queue Path
3. To give the image a title, complete the Description field.

Viewing OLE properties

Access a form where attachments are available.

1. On Media Objects, in the button panel, click the right mouse button over an OLE object button, and then select Properties from the pop-up menu.
2. On the OLE Object Properties tab, review these fields:
   - File Name
   - Queue Name
   - Queue Path

Setting Shortcut Properties

Access Media Objects.

1. On Media Objects, in the button panel, click the right mouse button over a shortcut button, and then select Properties from the pop-up menu.
2. On the JDEShortcut Control Properties form, review these fields on the General tab:
   - Menu Name
   - Selection
   - Icon File
   - Icon Index
3. Do these tasks, if necessary:
   - Click the Colors tab to set the color for the shortcut hypertext.
   - Click the Fonts tab to set font properties such as size, family, bold, italics, underline, and strikeout.

Working with Metadata to Media Objects

This section discusses how to:

- Enable metadata fields for media objects
- View and define metadata

Enabling Metadata Fields for Media Objects

The system enables you to add information to media objects in the form of metadata. Metadata can include items such as author, creation date, and language of the media object attachment.

Before you can add metadata, you must enable the metadata fields for the media object in the Media Object Category Constants program (P00167).

To enable metadata fields for media objects:

From the GH9016 menu, select Media Object Constants (P00167).

1. On Work With Media Object Category Constants, find the media object that you want to enable.

   The system will enable the metadata fields for all the media objects that are associated with the media object that you select.
2. Highlight the media object and then click Select.
3. On the General tab of Media Object Category Constants Revisions, select the check boxes next to the available metadata field options to enable those metadata fields in the media object.
4. Click OK.

Viewing and Defining Metadata

Access a form with an attachment.

1. On any form with an attachment, in the Media Objects button panel, right-click an object button, and then select Characterize Object from the pop-up menu.
2. On the Media Object Category Revisions form, click the General tab, and then complete the available fields for the media object.
3. Click OK.

Description	Glossary
Description	A short description to describe what the media object is about.
Author	This is the author of the media object document or attachment.
Creation Date	For World, used in the DDS specifications for IBM's file-field reference display.
Status	Indicate if this media object is active or obsolete.

Attaching OLE Objects at the Base Form Level

The section discusses how to:

- Attach OLE objects at the base form level
- Delete OLE objects at the base form level

Attaching OLE Objects at the Base Form Level

At the base level of a standard form, you can attach OLE objects using the OLE Objects button on the Links toolbar. Menu bars and toolbars appear on all standard forms. When you attach an OLE object at the base level of a form, rather than associating the attachment with a record, the OLE object attaches only to the form. No matter what record appears on the form, the OLE object that you attach using the OLE Objects button will always appear when you open the form.

Access a standard form.

1. Complete one of these tasks:
   - From the Links toolbar, select Preferences, and then OLE Objects.
   - From the Preferences menu, select OLE Objects.
   - If attachments exist for the form, click the document button to the right of the status bar.
2. On the Choose Queue form, select the appropriate queue.

   Note. If you do not know the queue in which the object you want to attach exists, ask your system administrator.

3. On the OLE Objects form, do one of the following:
   - From the File menu, select Add Object.

- In the button panel, click the right mouse button and then select Add Object.

4. On Insert Object, to create a new object, select the type of object that you want to create 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, select Create from File, locate the object on your system, and then click OK.

   Depending on whether you create an object or attach an existing object, the application associated with the object displays either a blank workspace or the existing object in the viewer panel.

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

7. Edit the object in the viewer panel.
8. To return to the main form, click the X button on the OLE Objects form in the application workspace.

Deleting OLE Objects at the Base Form Level

Access a standard form.

1. Complete one of these tasks:
   - From the Links toolbar, select Preferences and then select OLE Objects.
   - From the Preferences menu, select OLE Objects.
   - Click the document button to the right of the status bar.
2. On the OLE Objects form, select the object and complete one of these tasks:
   - From the File menu, select Delete Object.
   - In the button panel, click the right mouse button and select Delete Object.
3. On Confirm Media Object Delete, click Yes.
4. To return to the main form, click the X button on the OLE Objects form in the application workspace.

CHAPTER 9

Using MailMerge Workbench

This chapter provides an overview of the MailMerge workbench and discusses how to work with MailMerge documents.

Understanding MailMerge Workbench

MailMerge Workbench merges Microsoft Word 6.0 (or higher) word processing documents with JD Edwards EnterpriseOne system records to automatically print business documents, such as form letters. Some application suites, such as Human Resource Management, use these documents within their normal workflow process. See your application guides to determine which applications use mail-merge documents. In these applications, the system automatically prints the mail-merge documents as part of the workflow process, and no user intervention is needed.

You can use the Maintain MailMerge Documents application to add or change text in the business documents included with JD Edwards EnterpriseOne software to create new documents and to delete documents.

JD Edwards EnterpriseOne software enables you to create HTML versions of mail-merge documents to send to Web client users. After you add text and fields to the mail-merge document, you can copy it to an HTML version so that you can send mail-merge letters to Web client users. When a mail-merge letter is generated, the system displays the letter in the Web Mail Merge program (P980040).

Creating a Data Set and Attaching Templates

This section provides an overview of data set and discusses how to create a data set and how to attach templates to the data set.

Understanding Data Sets

A data set is the way you define the data structure that passes data to the API. After you define the data set, you will attach to it a simple template or a composite template. A simple template is a single template that you attach to a data set. A composite template is a collection of simple templates. Use only templates in the .rtf format.

Attaching Templates to a Data Set

After you have created a data set, you must attach either a simple template, or a composite template.

CHAPTER 10

Using Processing Options

The chapter provides overviews for processing options, processing option functions, and types of processing options, and discusses how to work with processing options.

Understanding Processing Options

A processing option is a parameter in which you enter a value to control how an interactive or batch program runs.

You use processing options to instruct the system to perform functions to meet your specific business needs. If a program contains processing options, you set the required and optional processing options for the program during setup or before you run or submit a program.

You can create different versions of each program if your business needs require specific processing for different processes. You can then set these unique processing options differently in multiple versions of the same application. Changes to processing options immediately affect that version for every user. Anyone who uses that version after you make the change uses the new processing option values. You can also use processing options to access a version of another program.

Important! XJDE versions are considered owned by JD Edwards. During an upgrade, the system might overwrite these versions. You should use these versions only as templates for your own versions.

ZJDE versions are used for default purposes, and are typically interactive applications or versions called from another application. You usually attach these versions to a menu. You can set these processing options. When called from a menu, interactive applications with a version are called with a blind execution based on predetermined processing option values.

Understanding Processing Option Functions

Use processing options to complete one of these tasks:

- Set up default values
- Customize an application for different companies or even different users
- Control the format of forms and reports
- Control page breaks and the location where totaling occurs for reports

Processing options appear in the system as a tabbed form. Tabs organize the processing options by purpose and function. Each processing option tab contains these items:

- A standard or unique tab name
- Processing option titles
- Lists of values
- Online help (enhanced processing options)

  You access field-level help by placing the cursor is in a field and pressing F1 or by clicking the Item Help icon located at the top-right corner of a form. If the field in which the cursor resides is a business view column, the system displays the alias name, business view name and description, table name and description, and glossary text. If the field in which your cursor resides is a data dictionary column, the system displays the alias name, the term Data Dictionary Item, and the glossary text. This information enables you to identify problems in the item help functionality, should any occur.

  Note. If your system administrator has not turned on the appropriate functionality, you will see only the alias name and glossary text.

Understanding the Types of Processing Options

Processing options can be of two types: enhanced and nonenhanced.

Enhanced processing options provide detailed user information. For example, the user can look at the field name and values on the tab and quickly determine how to use the processing option; or the user can access online help by pressing F1 on the processing option for a detailed explanation. These processing options have been enhanced to JD Edwards EnterpriseOne standards. Enhanced processing option forms have a number, a brief title, and, if applicable, a concise list of values. These processing options have online help attached to them.

Nonenhanced processing options provide only a brief description in paragraph form. Sometimes these fields have no title; instead, they are numbered, and each number is followed by a brief explanation, in paragraph form, of relevant information (usually values). The processing option numbers sometimes span all tabs. The fields typically have data items attached but do not follow the same naming conventions as enhanced processing options

Working with Processing Options

This section provides an overview for working with process options and interactive and batch version processing options.

Understanding Processing Options

You can work with processing options in these two ways:

- From a menu
- From a version list

How Processing Options Work From a Menu

You can access processing options for an object either from the menu bar or by right-clicking the object. In either case, one of the options is Prompt For. The Prompt For submenu contains these options, when available:

Options	Description
Values	Choose this option to specify processing option values.
Version	Choose this option to select which version of the object to run. Depending on how the version was designed, you might be prompted to enter processing option values after you select the version, or you might be able to modify them from the Row menu.
Data Selection	Choose this option to specify which data to use.
Data Selection and Values	Choose this option to specify which data to use and then to specify processing option values.

If you select to run processing options from a menu, the processing details defined at the menu level take precedence. Not all objects enable you to select from all four of these options.

Using Interactive Version Processing Options

The processing options that you define in interactive versions are a set of parameters that alter how an application runs. They are similar to initialization (.ini) files and command-line arguments for a traditional executable. These processing options let you specify the options that you want when you open an application. For example, you can specify how a form appears, show or hide a field, change the default status for order activity rules, and set default information to appear in a field.

Not all JD Edwards EnterpriseOne software applications have processing options. If the Prompt For Values option on the Edit menu is grayed out, either no processing options are associated with the application or the system administrator has secured a version for the application. When you open a secured version from the Interactive Versions application, a security message appears to inform you that you do not have access to the version.

You must set processing options for an interactive application before you use versions with the application.

Using processing options, you set up interactive programs to suit your business requirements. For interactive versions, processing options complete these tasks:

- Change functions. For example, you can set a processing option to turn on or off order holds. You can also specify whether you want to automatically print pick slips after you enter an order that is based on a processing option value.
- Change default values. For example, you can set the processing options to set defaults for document types (such as quote orders or purchase orders) or line types (such as stock or nonstock items).
- Control the display of forms. For example, you can set the processing options to hide or show a cost field, a price field, or a commission field.

Access a Solution Explorer task view.

1. From the EnterpriseOne Menu, click the application for which you want to set processing options.
2. Click the and select Prompt For Values from the menu.
3. On Processing Options, enter appropriate values where applicable and click OK.

Using Version Processing Options

You can change the processing options for an existing batch version to suit your business requirements. For example, you can change processing option values that specify a range of dates for a report. However, not all batch versions have processing options associated with them. For example, a list of addresses might not require special prompting.

For batch versions, processing options complete these tasks:

- Change functionality. For example, you can set a processing option to move records to a history file after a report runs.
- Change input parameters. For example, you can set a processing option to specify which category code to use when processing a report.
- Define data. For example, you can set a processing option to define the fiscal year for which you want to run a report. You can also define the employee information included in a report.

Launching Processing Options for Batch Versions Manually

Access a Solution Explorer task view.

1. From a EnterpriseOne Menu, select the batch version application for which you want to set processing options.
2. On Work With Batch Versions - Available Versions, find and click a version of the report or other batch application.
3. On Work With Batch Versions - Available Versions, select Processing Options from the Row menu.
4. On Processing Options, enter appropriate values where applicable and click OK.

Using Processing Options for Master Business Functions

The purpose of a master business function (MBF) is to provide a central location for standard business rules about entering documents such as vouchers, invoices, and journal entries.

The MBF is composed of processing options that are shared by some programs. For example, the following journal entry programs use the processing options for the journal entry MBF:

- Journal Entries (P0911)
- Journal Entries with VAT (P09106)
- Journal Entry Batch Processor (R09110Z)
- Store and Forward JE Batch Processor (R09110ZS)
- Recurring Journal Entry Compute & Print (R09302)
- Indexed Comp Compute and Print Report(R093021)
- Variable Numerator Compute and Print (R093022)

Access Work With Interactive Versions from the System Administration Tools menu (GH9011).

1. Type the application number in the Interactive Application field and click Find. For example, type P0900049.
2. Choose a version.
3. To review the processing option settings for the version, select Processing Options from the Row menu.

APPENDIX A

Hot Keys

This appendix provides an overview about hot keys and identifies hot keys for these categories:

- Keyboard Shortcuts
- EnterpriseOne Menu
- Tree Grid
- Button Hot Keys
- Keyboard Shortcuts for the Calendar Tool
- Web Client Keyboard Shortcuts for the Calculator Tool
- Keyboard Shortcuts for Media Object Text
- Keyboard Shortcuts for the Calendar Control
- Moving in the Grid
- Keyboard Shortcuts for Media Object Text
- Moving in the Grid

Understanding Hot Keys

Menu options and buttons throughout the system include key combinations, or hot keys, that perform the same functions as using the mouse. All of the standard push buttons in the system have hot keys associated with them.

You can recognize hot keys by the underline on a control or menu. For example, the I on the Find button is underlined. Press Ctrl + Alt + I to use this control.

The hot keys work in both the Windows client and Web Client of JD Edwards EnterpriseOne software, except where noted.

Note. In the JD Edwards EnterpriseOne web client, all hot key combinations that use the Alt key only work with the left Alt key. The right Alt key is used for typing special characters for foreign languages.

Keyboard Shortcuts

The hot keys listed in the following tables are capitalized only to make them easier to read. You do not need to press the shift key to utilize hot key functionality unless the shift key is specifically listed.

Hot Keys	Action
F1	Access field help
F2 (web only)	Launch search button/Calendar/Calculator button on the current field.
Alt + Tab	Switch between all open applications on your PC.
F8 (web only)	Move focus to the EnterpriseOne Menu and loop between open applications.
F12 (web client only)	Move focus to the first focus-enabled control in the next group of controls.
Shift + F12(web client only)	Move focus to the first focus-enabled control in the previous group of controls.
Alt + 1 through Alt + 9 (web client only)	With focus on tab-sets, Alt + 1 shows the first tab, Alt + 2 shows the second and so forth, up to the 9th tab
Ctrl + Alt + 1 through Ctrl + Alt + 9	With focus on subtab sets, Ctrl + Alt + 1 shows the first subtab, Ctrl + Alt + 2 shows the second subtab, and so on, up to the ninth subtab.
Alt + N (web client only)	Launch new window
Alt + M (web client only)	Minimize/maximize EnterpriseOne Menu
Ctrl + Shift + J (web client only)	Launch System Information
Ctrl + Shift + K (web client only)	Launch keyboard information help
Alt + K (web client only)	Expand/Collapse subform or container
Alt + Q (web client only)	Move focus to first or next issue (error or warning) field. Move focus back to the first issue after reaching the last issue.
Ctrl + A	Selects all text in a field.
Ctrl + X	Cut or delete selected text
Ctrl + V	Paste cut or copied text to the new area
Ctrl + C	Copy selected text
Ctrl + Alt + P (web client only)	Open Report menu
Ctrl + Alt + T (web client only)	Open Tools menu
Ctrl + Alt + F (web client only)	Open Form menu

Hot Keys	Action
Ctrl + Alt + R (web client only)	Open Row menu
Up or Down Arrows	Move focus up or down between options on fly out menus. Press Enter to launch the option.

EnterpriseOne Menu

Hot Keys	Action
Alt + / (web client only)	Move focus to Fast Path when in EnterpriseOne Menu
Up and Down Arrows (web client only)	Move focus up or down from present node in navigation tree. If next node is a child node, move focus to it
Right Arrow (web client only)	Expand present node in navigation tree
Left Arrow (web client only)	Collapse present node in navigation tree
Enter (web client only)	Launch end node if hyperlinked. If parent node, expand it. If expanded, collapses it

Tree Grid

Hot Keys	Action
Ctrl + Shift + Right Arrow (web client only)	Expand node
Ctrl + Shift + Left Arrow (web client only)	Collapse node

Button Hot Keys

Hot Keys	Action
Ctrl + Alt + A (web client only)	Add
Ctrl + Alt + B (web client only)	Save for Later, Back on Media Object Viewer form
Ctrl + Alt + D (web client only)	Delete
Ctrl + Alt + E (web client only)	Save and Continue, Continue in Import/Export Grid Data

Hot Keys	Action
Ctrl + Alt + F (web client only)	Open Form menu, place focus on first option
Ctrl + Alt + G (web client only)	Assign
Ctrl + Alt + I (web client only)	Find, File Media Object view/add form
Ctrl + Alt + L (web client only)	Cancel/Close
Ctrl + Alt + M (web client only)	Remove, New Template on Media Object Viewer form
Ctrl + Alt + N (web client only)	Save and Add New
Ctrl + Alt + O (web client only)	OK, Save and Close, Submit, New OLE Media Object on Media Object Viewer form
Ctrl + Alt + P (web client only)	Open Reports menu, place focus on first option
Ctrl + Alt + R (web client only)	Open Row menu, place focus on first option
Ctrl + Alt + S (web client only)	Select
Ctrl + Alt + T (web client only)	Open Tools menu, place focus on first option
Ctrl + Alt + U (web client only)	Undo Changes, Enter URL on Media Object Viewer form
Ctrl + Alt + V (web client only)	Save, Save Changes
Ctrl + Alt + X (web client only)	New Text media object on Media Object Viewer form
Ctrl + Alt + Y (web client only)	Copy
Ctrl + Alt + Z (web client only)	Characterize on Media Object Viewer form
Ctrl + Alt + Up Arrow (web client only)	Move selection up in Data Selection and Sequencing dialog
Ctrl + Alt + Down Arrow (web client only)	Move selection down in Data Selection and Sequencing dialog

Keyboard Shortcuts for the Calendar Tool

Hot Keys	Action
Page Up	Move to previous month.
Page Down	Move to next month.
Home (web client only)	Move to previous year.
End (web client only)	Move to the next year.

Hot Keys	Action
Enter (web client only)	Close the Calendar and set the current value to the input field with search button (OK action).
Escape (web client only)	Close the Calendar and return to the input field with search button (Cancel action).

Web Client Keyboard Shortcuts for the Calculator Tool

Hot Keys	Action
Backspace (web client only)	Remove one digit from calculator display.
F9 (web client only)	Change the sign of the number on calculator display.
= or Enter (web client only)	Evaluate and display the result.
Escape (web client only)	Clear the calculator display.
Digit Key (0123456789.) (web client only)	Show the number in the display field.
%, *, +, -, / (web client only)	Perform an operation corresponding to the key stroke and display the result.
@ (web client only)	Perform square root operation.
R or r (web client only)	1/X Operation.
O (web client only)	Close the calculator and set the current value to the input field with search button (OK action).
C (web client only)	Close the calculator and return to the input field with search button (cancel action).

Keyboard Shortcuts for Media Object Text

Hot Keys	Action
Ctrl + B	Bold the selected text
Ctrl + I	Italicize the selected text
Ctrl + U	Underline the selected text

Hot Keys	Action
Ctrl + Shift + L	Create a bullet
Ctrl + Tab	Exit the text edit form and display the next object in the tab sequence

Keyboard Shortcuts for Calendar Control

Hot Keys	Action
Ctrl + Alt + D (web client only)	Switch to Day view
Ctrl + Alt + W (web client only)	Switch to Week view
Ctrl + Alt + M (web client only)	Switch to Month view
Ctrl + Alt + Right Arrow (web client only)	Move to next day/week/month as per current view
Ctrl + Alt + Left Arrow (web client only)	Move to previous day/week/month as per current view
Ctrl + Alt + A (web client only)	Add an activity
Ctrl + Alt + E (web client only)	Move focus to first/next event. If All Day Events exist, the focus is set to the first day to last, from AM to PM. If on month view, move focus from first day to last.

Moving in the Grid

Hot Keys	Action
Tab	Move to the next cell. The order is right and then down. Available only in grids where you can enter information.
Shift + Tab	Move focus to previous link, form field, button, or hot linked button.
Ctrl + V	Paste the Clipboard data into the current cell location.
Ctrl + C	Copy the current selection or data in a cell to the Clipboard.
Enter in a grid cell (web client only)	Move focus to first editable field in the row below the current one.
Spacebar on the Grid Selection Check box (web client only)	Select the row that the check box represents. A user can tab through the controls to set focus on the Grid Selection Check box.

Hot Keys	Action
F2 (web client only)	Launch Search button from the current cell.
Alt + / (web client only)	Move focus to first enabled cell in the QBE row, if QBE is present. Cycle through all QBE cells
ENTER in QBE	Trigger Find operation.
PAGE UP	Page up (or show previous page of grid data)
PAGE DOWN	Page down (or show next page of grid data)
Alt + R (web client only)	Maximize/minimize grid
Ctrl + Shift + E (web client only)	Export Grid Data
Ctrl + Shift + I (web client only)	Import Grid Data
Alt + J (web client only)	On editable grids, set focus on the first editable cell in the grid. On non-editable grids, set focus on the row selector for the first row in the grid.
Up and Down Arrows	Move focus to the field above or below, in the same column
Ctrl + Up Arrow (web client only)	Select previous row
Ctrl + Down Arrow (web client only)	Select next row
Ctrl + Alt + Left Arrow	Move focus to first editable cell in current row
Ctrl + Alt + Right Arrow	Move focus to last editable cell in current row
ENTER in grid row	Move focus to first editable field in the row below
Ctrl + Home	Move focus to first row, current column
Ctrl + End	Move focus to last row, current column
Ctrl + Alt + [spacebar] (web client only)	Select current row

APPENDIX B

JD Edwards EnterpriseOne Software Systems

This appendix provides a list of the JD Edwards EnterpriseOne systems.

JD Edwards EnterpriseOne Software Systems

The following table identifies the JD Edwards EnterpriseOne systems:

Number	System
00	Foundation Environment
01	Address Book
02	Electronic Mail
03	Accounts Receivable
0301	Credit Management
03B	Enhanced Accounts Receivable
03C	Issue Management System
04	Accounts Payable
05	Time Accounting and HRM Base
05A	OW HR & PR Foundation
05C	OW HR & PR Foundation Canadian
05T	Time Entry
05U	OW HR & PR Foundation US
06	Do not use
07	Payroll
07S	Payroll SUI
07Y	U.S. Payroll Year End

Number	System
08	Human Resources
08B	Benefits Administration
08C	OW HR Canadian
08H	Health and Safety
08P	Position Control
08R	Recruitment Management
08U	OW HR US
08W	Wage and Salary
09	General Accounting
09E	Expense Reimbursement
10	Financial Reporting
10C	Multisite Consolidations
11	Multicurrency
11C	Cash Basis
12	Fixed Assets
13	Plant/Equipment Management
14	Modeling, Planning & Budgeting
15	Property Management
16	Profit Management (EPS)
17	Customer Service Management
17C	Call Management
18	Resource Scheduling
19	Utility CIS
30	Product Data Management
3010	Process Data Management
31	Shop Floor Control
3110	Process Control

Number	System
32	Configuration Management
32C	Custom Works
33	Capacity Planning
34	Requirements Planning
34A	Advanced Planning & Scheduling
35	Enterprise Facility Planning
36	Forecasting
37	Quality Management
38	Agreement Management
39	Advanced Stock Valuation
40	Inventory/OP Base
4010	Advanced Price Adjustments
41	Inventory Management
41B	Bulk Stock Management
42	Sales Management
42A	Sales Force Automation
42E	ECS Sales Management
43	Procurement
44	Subcontract Management
4401	Homebuilder Management
44H	Homebuilder Management
45	Advanced Pricing
46	Warehouse Management
47	Electronic Commerce
48	Work Order Processing
48S	Service Billing
49	Transportation Management

Number	System
50	Job Cost Base
51	Job Costing
52	Contract Billing
53	Change Management
55 - 59	Reserved for Clients
60 - 69	Reserved for JDE Custom
70	Multinational Products
71	Client Server Applications
72	World Vision
73	M & D Complementary Products
74	EMEA Localization
74H	Hungary
74I	Ireland
74L	Portugal
74N	Nordics
74P	Poland
74R	CIS
74S	Spain
74T	Turkey
74Z	Czech Republic
75	ASEAN Localization
75H	Thailand
75I	India
75K	Korea
75T	Taiwan
76	Latin American Localization
76A	Argentina

Number	System
76B	Brazil Localization
76C	Colombia
76H	Chile
76P	Peru
76V	Venezuela
77	Payroll (Canadian)
77Y	Canada Payroll Year End
79	Translation Tools
80	Business Intelligence
81	DREAM Writer
82	World Writer
83	Management Reporting - FASTR
84	Distributive Data Processing
85	Custom Programming
86	Electronic Doc. Interchange
87	JDE Internal
88	Cautious Purge System
89	Conversion Programs
91	Documentation
92	Computer Assisted Design
93	Computer Assisted Programming
94	Security Officer
95	Sleeper-now in system 96
96	Computer Operations
97	Software Installation
98	Technical Tools
98E	Electronic Burst and Bind

Number	System
98FT	Form Type
98SA	Sample Application
99	Technical Tools - Internal
99D	Technical Tools - DASD Sizer
99M	Technical Tools-Masters/Update
B	LANGUAGE TRANSLATIONS
B1A	Chinese - Simple
B1B	Chinese - Complex
B1E	English
B1F	French
B1G	German
B1I	Italian
B1J	Japanese
B1P	Portuguese
B1S	Spanish
B2A	Dutch
B2D	Danish
B2F	Finnish
B2N	Norwegian
B2S	Swedish
B3C	Czech
B3H	Hebrew
B3R	Russian
BC1	Chinese - Simple
BC2	Chinese - Complex
BCR	Czech
BDN	Danish

Number	System
BDU	Dutch
BFI	Finnish
BFR	French
BGR	German
BHE	Hebrew
BIT	Italian
BJP	Japanese
BNO	Norwegian
BPO	Portuguese
BRU	Russian
BSP	Spanish
BSW	Swedish
D3N	dcLINK (data collection)
H01	Address Book (inc. ALL Mail)
H03	Accounts Receivable
H03B	New Accounts Receivable
H04	Accounts Payable
H05	Standalone Time Accounting
H07	Payroll
H08	Human Resources
H09	General Accounting
H12	Fixed Assets
H13	Equipment/Plant Management
H15	Commercial Property Management
H30	Product Data Management
H301	Process Data Management
H31	Shop Floor Control

Number	System
H311	Process Control
H32	Configuration Management
H33	Capacity Requirements Planning
H34	DRP/MRP/MPS
H35	Enterprise Facility Planning
H36	Advanced Forecasting
H40	Inventory/OP Base
H41	Inventory Management
H415	Bulk Inventory Management
H42	Sales Order Processing
H43	Purchase Order Processing
H44	Contract Management
H44H	Homebuilder Management
H45	Sales Analysis
H46	Warehouse Management
H50	Job Cost Base
H72	Client/Server Base
H73	CS - A/P Voucher Entry
H74	CS - Pay Time Entry
H75	CS - Sales Order Entry
H76	CS - Training & Development
H78	CS - Travel Expense Management
H79	CS - Forecasting
H90	JD Edwards EnterpriseOne TOOLS
H91	Design Tools
H92	Interactive Engine/OL
H93	Data Base and Communications

Number	System
H94	Batch Engine
H95	Tech Resources/Applications
H96	Deployment
H97	Benchmarking/Performance
H98	internet
H99	Product Version Control
H99P	Technical Tools-OWPVC Internal
JE42	Sales Order/Pricing
JE44	Distribution Contracts
JE48	Automated Gantry Inter.
KZ1	PC Budget Upload (A3 to A5)
KZ2	PC Data Entry for AP
KZ3	PC Data Entry for Payroll
SY	SYSTEM
Z101	MTI Electrical Distribution
Z102	CRES
Z91	System/ Product Codes

Glossary of JD Edwards EnterpriseOne Terms

activity — A scheduling entity in JD Edwards EnterpriseOne tools that represents a designated amount of time on a calendar.

activity rule — The criteria by which an object progresses from one given point to the next in a flow.

add mode — A condition of a form that enables users to input data.

Advanced Planning Agent (APAg) — A JD Edwards EnterpriseOne tool that can be used to extract, transform, and load enterprise data. APAg supports access to data sources in the form of rational databases, flat file format, and other data or message encoding, such as XML.

application server — A server in a local area network that contains applications shared by network clients.

as if processing — A process that enables you to view currency amounts as if they were entered in a currency different from the domestic and foreign currency of the transaction.

alternate currency — A currency that is different from the domestic currency (when dealing with a domestic-only transaction) or the domestic and foreign currency of a transaction.

In JD Edwards EnterpriseOne Financial Management, alternate currency processing enables you to enter receipts and payments in a currency other than the one in which they were issued.

as of processing — A process that is run as of a specific point in time to summarize transactions up to that date. For example, you can run various JD Edwards EnterpriseOne reports as of a specific date to determine balances and amounts of accounts, units, and so on as of that date.

back-to-back process — A process in JD Edwards EnterpriseOne Supply Management that contains the same keys that are used in another process.

batch processing — A process of transferring records from a third-party system to JD Edwards EnterpriseOne.

In JD Edwards EnterpriseOne Financial Management, batch processing enables you to transfer invoices and vouchers that are entered in a system other than JD Edwards EnterpriseOne to JD Edwards EnterpriseOne Accounts Receivable and JD Edwards EnterpriseOne Accounts Payable, respectively. In addition, you can transfer address book information, including customer and supplier records, to JD Edwards EnterpriseOne.

batch server — A server that is designated for running batch processing requests. A batch server typically does not contain a database nor does it run interactive applications.

batch-of-one immediate — A transaction method that enables a client application to perform work on a client workstation, 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 and store-and-forward.

business function — A named set of user-created, reusable business rules and logs that can be called through event rules. Business functions can run a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the application programming interfaces (APIs) that enable them to be called from a form, a database trigger, or a non-JD Edwards 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 See named event rule (NER).

business view A means for selecting specific columns from one or more JD Edwards EnterpriseOne application tables whose data is used in an application or report. A business view does not select specific rows, nor does it contain any actual data. It is strictly a view through which you can manipulate data.

central objects merge A process that blends a customer's modifications to the objects in a current release with objects in a new release.

central server A server that has been designated to contain the originally installed version of the software (central objects) for deployment to client computers. In a typical JD Edwards EnterpriseOne installation, the software is loaded on to one machine—the central server. Then, copies of the software are pushed out or downloaded to various workstations attached to it. That way, if the software is altered or corrupted through its use on workstations, an original set of objects (central objects) is always available on the central server.

charts Tables of information in JD Edwards EnterpriseOne that appear on forms in the software.

connector Component-based interoperability model that enables third-party applications and JD Edwards EnterpriseOne to share logic and data. The JD Edwards EnterpriseOne connector architecture includes Java and COM connectors.

contra/clearing account A general ledger account in JD Edwards EnterpriseOne Financial Management that is 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 in JD Edwards EnterpriseOne Financial Management.

Control Table Workbench An application that, during the Installation Workbench processing, runs the batch applications for the planned merges that update the data dictionary, user-defined codes, menus, and user override tables.

control tables merge A process that blends a customer's modifications to the control tables with the data that accompanies a new release.

cost assignment The process in JD Edwards EnterpriseOne Advanced Cost Accounting of tracing or allocating resources to activities or cost objects.

cost component In JD Edwards EnterpriseOne Manufacturing, an element of an item's cost (for example, material, labor, or overhead).

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.

currency restatement The process of converting amounts from one currency into another currency, generally for reporting purposes. You can use the currency restatement process, for example, when many currencies must be restated into a single currency for consolidated reporting.

database server A server in a local area network that maintains a database and performs searches for client computers.

Data Source Workbench An application that, during the Installation Workbench process, copies all 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.

date pattern	A calendar that represents the beginning date for the fiscal year and the ending date for each period in that year in standard and 52-period accounting.
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 information	Information that relates to individual lines in JD Edwards EnterpriseOne transactions (for example, voucher pay items and sales order detail lines).
direct connect	A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate and store-and-forward.
Do Not Translate (DNT)	A type of data source that must exist on the iSeries because of BLOB restrictions.
dual pricing	The process of providing prices for goods and services in two currencies.
edit code	A code that indicates how a specific value for a report or a form should appear or be formatted. The default edit codes that pertain to reporting require particular attention because they account for a substantial amount of information.
edit mode	A condition of a form that enables users to change data.
edit rule	A method used for formatting and validating user entries against a predefined rule or set of rules.
Electronic Data Interchange (EDI)	An interoperability model that enables paperless computer-to-computer exchange of business transactions between JD Edwards EnterpriseOne and third-party systems. Companies that use EDI must have translator software to convert data from the EDI standard format to the formats of their computer systems.
embedded event rule	An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with the business function event rule.
Employee Work Center	A central location for sending and receiving all JD Edwards 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.
enterprise server	A server that contains the database and the logic for JD Edwards EnterpriseOne.
EnterpriseOne object	A reusable 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.
EnterpriseOne process	A software process that enables JD Edwards EnterpriseOne clients and servers to handle processing requests and run transactions. A client runs one process, and servers can have multiple instances of a process. JD Edwards EnterpriseOne processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.
Environment Workbench	An application that, during the Installation Workbench process, 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.
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.

event rule	A logic statement that instructs the system to perform one or more operations based on an activity that can occur in a specific application, such as entering a form or exiting a field.
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. A facility is sometimes referred to as a “business unit.”
fast path	A command prompt that enables the user to move quickly among menus and applications by using specific commands.
file server	A server that stores files to be accessed by other computers on the network. Unlike a disk server, which appears to the user as a remote disk drive, a file server is a sophisticated device that not only stores files, but also manages them and maintains order as network users request files and make changes to these files.
final mode	The report processing mode of a processing mode of a program that updates or creates data records.
FTP server	A server that responds to requests for files via file transfer protocol.
header information	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.
interface table	See Z table.
integration server	A server that facilitates interaction between diverse operating systems and applications across internal and external networked computer systems.
integrity test	A process used to supplement a company’s internal balancing procedures by locating and reporting balancing problems and data inconsistencies.
interoperability model	A method for third-party systems to connect to or access JD Edwards EnterpriseOne.
in-your-face-error	In JD Edwards EnterpriseOne, a form-level property which, when enabled, causes the text of application errors to appear on the form.
IServer service	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.
jargon	An alternative data dictionary item description that JD Edwards EnterpriseOne appears 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. This server provides middleware services for security and state maintenance, along with data access and persistence.
JDBNET	A database driver that enables heterogeneous servers to access each other’s data.
JDEBASE Database Middleware	A JD Edwards EnterpriseOne proprietary database middleware package that provides platform-independent APIs, along with client-to-server access.
JDECallObject	An API used by business functions to invoke other business functions.
jde.ini	A JD Edwards EnterpriseOne file (or member for iSeries) that provides the runtime settings required for JD Edwards EnterpriseOne initialization. Specific versions of the file or member must reside on every machine running JD Edwards EnterpriseOne. This includes workstations and servers.
JDEIPC	Communications programming tools used by server code to regulate access to the same data in multiprocess environments, communicate and coordinate between processes, and create new processes.

jde.log The main diagnostic log file of JD Edwards EnterpriseOne. This file is always located in the root directory on the primary drive and contains status and error messages from the startup and operation of JD Edwards EnterpriseOne.

JDENET A JD Edwards EnterpriseOne proprietary communications middleware package. This package 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 JD Edwards EnterpriseOne supported platforms.

Location Workbench An application that, during the Installation Workbench process, 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.

logic server A server in a distributed network that provides the business logic for an application program. In a typical configuration, pristine objects are replicated on to the logic server from the central server. The logic server, in conjunction with workstations, actually performs the processing required when JD Edwards EnterpriseOne software runs.

MailMerge Workbench An application that merges Microsoft Word 6.0 (or higher) word-processing documents with JD Edwards EnterpriseOne records to automatically print business documents. You can use MailMerge Workbench to print documents, such as form letters about verification of employment.

master business function (MBF) An interactive master file that serves as a central location for adding, changing, and updating information in a database. Master business functions pass information between data entry forms and the appropriate tables. These master functions provide a common set of functions that contain all of the necessary default and editing rules for related programs. MBFs contain logic that ensures the integrity of adding, updating, and deleting information from databases.

master table See published table.

matching document A document associated with an original document to complete or change a transaction. For example, in JD Edwards EnterpriseOne Financial Management, a receipt is the matching document of an invoice, and a payment is the matching document of a voucher.

media storage object Files that use one of the following naming conventions that are not organized into table format: Gxxx, xxxGT, or GTxxx.

message center A central location for sending and receiving all JD Edwards EnterpriseOne messages (system and user generated), regardless of the originating application or user.

messaging adapter An interoperability model that enables third-party systems to connect to JD Edwards EnterpriseOne to exchange information through the use of messaging queues.

messaging server A server that handles messages that are sent for use by other programs using a messaging API. Messaging servers typically employ a middleware program to perform their functions.

named event rule (NER) Encapsulated, reusable business logic created using event rules, rather that C programming. NERs are also called business function event rules. NERs can be reused in multiple places by multiple programs. This modularity lends itself to streamlining, reusability of code, and less work.

nota fiscal In Brazil, a legal document that must accompany all commercial transactions for tax purposes and that must contain information required by tax regulations.

nota fiscal factura In Brazil, a nota fiscal with invoice information.

See also *nota fiscal.*

Object Configuration Manager (OCM)
In JD Edwards EnterpriseOne, the object request broker and control center for the runtime environment. OCM keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, OCM directs access to it using defaults and overrides for a given environment and user.

Object Librarian
A repository of all versions, applications, and business functions reusable in building applications. Object Librarian provides check-out and check-in capabilities for developers, and it controls the creation, modification, and use of JD Edwards EnterpriseOne objects. Object Librarian supports multiple environments (such as production and development) and enables objects to be easily moved from one environment to another.

Object Librarian merge
A process that blends any modifications to the Object Librarian in a previous release into the Object Librarian in a new release.

Open Data Access (ODA)
An interoperability model that enables you to use SQL statements to extract JD Edwards EnterpriseOne data for summarization and report generation.

Output Stream Access (OSA)
An interoperability model that enables you to set up an interface for JD Edwards EnterpriseOne to pass data to another software package, such as Microsoft Excel, for processing.

package
JD Edwards 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 on the deployment server the installation program can find them. It is point-in-time snapshot of the central objects on the deployment server.

package build
A software application that facilitates the deployment of software changes and new applications to existing users. Additionally, in JD Edwards EnterpriseOne, a package build can be a compiled version of the software. When you upgrade your version of the ERP software, for example, you are said to take a package build.

Consider the following context: “Also, do not transfer business functions into the production path code until you are ready to deploy, because a global build of business functions done during a package build will automatically include the new functions.” The process of creating a package build is often referred to, as it is in this example, simply as “a package build.”

package location
The directory structure location for the package and its set of replicated objects. This is usually \\deployment server\release\path_code\package\package name. The subdirectories under this path are where the replicated objects for the package are placed. This is also referred to as where the package is built or stored.

Package Workbench
An application that, during the Installation Workbench process, 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.

planning family
A means of grouping end items whose similarity of design and manufacture facilitates being planned in aggregate.

preference profile
The ability to define default values for specified fields for a user-defined hierarchy of items, item groups, customers, and customer groups.

print server
The interface between a printer and a network that enables network clients to connect to the printer and send their print jobs to it. A print server can be a computer, separate hardware device, or even hardware that resides inside of the printer itself.

pristine environment
A JD Edwards EnterpriseOne environment used to test unaltered objects with JD Edwards EnterpriseOne demonstration data or for training classes. You must have this environment so that you can compare pristine objects that you modify.

processing option A data structure that enables users to supply parameters that regulate the running of a batch program or report. For example, you can use processing options to specify default values for certain fields, to determine how information appears or is printed, to specify date ranges, to supply runtime values that regulate program execution, and so on.

production environment A JD Edwards EnterpriseOne environment in which users operate EnterpriseOne software.

production-grade file server A file server that has been quality assurance tested and commercialized and that is usually provided in conjunction with user support services.

program temporary fix (PTF) A representation of changes to JD Edwards EnterpriseOne software that your organization receives on magnetic tapes or disks.

project In JD Edwards EnterpriseOne, a virtual container for objects being developed in Object Management Workbench.

promotion path The designated path for advancing objects or projects in a workflow. The following is the normal promotion cycle (path):

11>21>26>28>38>01

In this path, *11* equals new project pending review, *21* equals programming, *26* equals QA test/review, *28* equals QA test/review complete, *38* equals in production, *01* equals complete. During the normal project promotion cycle, developers check objects out of and into the development path code and then promote them to the prototype path code. The objects are then moved to the productions path code before declaring them complete.

proxy server A server that acts as a barrier between a workstation and the internet so that the enterprise can ensure security, administrative control, and caching service.

published table Also called a master table, this is the central copy to be replicated to other machines. Residing on the publisher machine, the F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

publisher The server that is responsible for the published table. The F98DRPUB table identifies all of the published tables and their associated publishers in the enterprise.

pull replication One of the JD Edwards EnterpriseOne methods for replicating data to individual workstations. Such machines are set up as pull subscribers using JD Edwards EnterpriseOne 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 F98DRPCN table.

QBE An abbreviation for query by example. In JD Edwards EnterpriseOne, the QBE line is the top line on a detail area that is used for filtering data.

real-time event A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and to provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when certain transactions occur.

refresh A function used to modify JD Edwards EnterpriseOne software, or subset of it, such as a table or business data, so that it functions at a new release or cumulative update level, such as B73.2 or B73.2.1.

replication server A server that is responsible for replicating central objects to client machines.

quote order In JD Edwards Procurement and Subcontract Management, a request from a supplier for item and price information from which you can create a purchase order.

	In JD Edwards Sales Order Management, item and price information for a customer who has not yet committed to a sales order.
selection	Found on JD Edwards EnterpriseOne menus, a selection represents functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.
Server Workbench	An application that, during the Installation Workbench process, 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.
spot rate	An exchange rate entered at the transaction level. This rate overrides the exchange rate that is set up between two currencies.
Specification merge	A merge that comprises three merges: Object Librarian merge, Versions List merge, and Central Objects merge. The merges blend customer modifications with data that accompanies a new release.
specification	A complete description of a JD Edwards EnterpriseOne object. Each object has its own specification, or name, which is used to build applications.
Specification Table Merge Workbench	An application that, during the Installation Workbench process, runs the batch applications that update the specification tables.
store-and-forward	The mode of processing that enables users who are disconnected from a server to enter transactions and then later connect to the server to upload those transactions.
subscriber table	Table F98DRSUB, which is stored on the publisher server with the F98DRPUB table and identifies all of the subscriber machines for each published table.
supplemental data	Any type of information that is not maintained in a master file. Supplemental data is usually additional information about employees, applicants, requisitions, and jobs (such as an employee's job skills, degrees, or foreign languages spoken). You can track virtually any type of information that your organization needs. For example, in addition to the data in the standard master tables (the Address Book Master, Customer Master, and Supplier Master tables), you can maintain other kinds of data in separate, generic databases. These generic databases enable a standard approach to entering and maintaining supplemental data across JD Edwards EnterpriseOne systems.
table access management (TAM)	The JD Edwards EnterpriseOne component that handles the storage and retrieval of use-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	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
table conversion	An interoperability model that enables the exchange of information between JD Edwards EnterpriseOne and third-party systems using non-JD Edwards EnterpriseOne tables.
table event rules	Logic that is attached to database triggers that runs whenever the action specified by the trigger occurs against the table. Although JD Edwards EnterpriseOne enables event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.
terminal server	A server that enables terminals, microcomputers, and other devices to connect to a network or host computer or to devices attached to that particular computer.

three-tier processing	The task of entering, reviewing and approving, and posting batches of transactions in JD Edwards EnterpriseOne.
three-way voucher match	In JD Edwards Procurement and Subcontract Management, the process of comparing receipt information to supplier's invoices to create vouchers. In a three-way match, you use the receipt records to create vouchers.
transaction processing (TP) 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 may include programs that validate data and format terminal screens.
transaction set	An electronic business transaction (electronic data interchange standard document) made up of segments.
trigger	One of several events specific to data dictionary items. You can attach logic to a data dictionary item that the system processes automatically when the event occurs.
triggering event	A specific workflow event that requires special action or has defined consequences or resulting actions.
two-way voucher match	In JD Edwards Procurement and Subcontract Management, the process of comparing purchase order detail lines to the suppliers' invoices to create vouchers. You do not record receipt information.
User Overrides merge	Adds new user override records into a customer's user override table.
variance	In JD Edwards Capital Asset Management, the difference between revenue generated by a piece of equipment and costs incurred by the equipment. In JD Edwards EnterpriseOne Project Costing and JD Edwards EnterpriseOne Manufacturing, the difference between two methods of costing the same item (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 using the current bill of material, routing, and overhead rates.
Version 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.
visual assist	Forms that can be invoked from a control via a trigger to assist the user in determining what data belongs in the control.
vocabulary override	An alternate description for a data dictionary item that appears on a specific JD Edwards EnterpriseOne form or report.
wchar_t	An internal type of a wide character. It is used for writing portable programs for international markets.
web application server	A web server that enables web applications to exchange data with the back-end systems and databases used in eBusiness transactions.
web server	A server that sends information as requested by a browser, using the TCP/IP set of protocols. A web server can do more than just coordination of requests from browsers; it can do anything a normal server can do, such as house applications or data. Any computer can be turned into a web server by installing server software and connecting the machine to the internet.
Windows terminal server	A multiuser server that enables terminals and minimally configured computers to display Windows applications even if they are not capable of running Windows software themselves. All client processing is performed centrally at the Windows

terminal server and only display, keystroke, and mouse commands are transmitted over the network to the client terminal device.

workbench

A program that enables users to access a group of related programs from a single entry point. Typically, the programs that you access from a workbench are used to complete a large business process. For example, you use the JD Edwards EnterpriseOne Payroll Cycle Workbench (P07210) to access all of the programs that the system uses to process payroll, print payments, create payroll reports, create journal entries, and update payroll history. Examples of JD Edwards EnterpriseOne workbenches include Service Management Workbench (P90CD020), Line Scheduling Workbench (P3153), Planning Workbench (P13700), Auditor's Workbench (P09E115), and Payroll Cycle Workbench.

work day calendar

In JD Edwards EnterpriseOne Manufacturing, a calendar that is used in planning functions that consecutively lists only working days so that component and work order scheduling can be done based on the actual number of work days available. A work day calendar is sometimes referred to as planning calendar, manufacturing calendar, or shop floor calendar.

workflow

The automation of a business process, in whole or in 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 server that usually contains subsets of data replicated from a master network server. A workgroup server does not perform application or batch processing.

XAPI events

A service that uses system calls to capture JD Edwards EnterpriseOne transactions as they occur and then calls third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested notification when the specified transactions occur to return a response.

XML CallObject

An interoperability capability that enables you to call business functions.

XML Dispatch

An interoperability capability that provides a single point of entry for all XML documents coming into JD Edwards EnterpriseOne for responses.

XML List

An interoperability capability that enables you to request and receive JD Edwards EnterpriseOne database information in chunks.

XML Service

An interoperability capability that enables you to request events from one JD Edwards EnterpriseOne system and receive a response from another JD Edwards EnterpriseOne system.

XML Transaction

An interoperability capability that enables you to use a predefined transaction type to send information to or request information from JD Edwards EnterpriseOne. XML transaction uses interface table functionality.

XML Transaction Service (XTS)

Transforms an XML document that is not in the JD Edwards EnterpriseOne format into an XML document that can be processed by JD Edwards EnterpriseOne. XTS then transforms the response back to the request originator XML format.

Z event

A service that uses interface table functionality to capture JD Edwards EnterpriseOne transactions and provide notification to third-party software, end users, and other JD Edwards EnterpriseOne systems that have requested to be notified when certain transactions occur.

Z table

A working table where non-JD Edwards EnterpriseOne information can be stored and then processed into JD Edwards EnterpriseOne. Z tables also can be used to retrieve JD Edwards EnterpriseOne data. Z tables are also known as interface tables.

Z transaction

Third-party data that is properly formatted in interface tables for updating to the JD Edwards EnterpriseOne database.

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