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EnterpriseOne Production and Distribution Planning Collaborative Web Client Guide

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EnterpriseOne Production and Distribution Planning Collaborative Web Client Guide
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Contents

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.
- Download and 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

Downloading and Ordering Printed Documentation

In addition to the complete line of documentation that is delivered on your implementation guide CD-ROM, Oracle makes JD Edwards EnterpriseOne documentation available to you via Oracle's website. You can:

- Download PDF files.
- Order printed, bound volumes.

Downloading PDF Files

You can download PDF versions of JD Edwards EnterpriseOne documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, http://www.oracle.com/technology/documentation/psftent.html.

Ordering Printed, Bound Volumes

You can order printed, bound volumes of selected documentation via the Oracle Store.

See Oracle Store, http://oraclestore.oracle.com/OA_HTML/ibeCCtpSctDspRte.jsp?section=14021

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 + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + 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
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.
. . . (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 (|).

Typographical Convention or Visual Cue	Description
[ ] (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 your product line documentation manager at Oracle Corporation, 500 Oracle Parkway, Redwood Shores, CA 94065, U.S.A. Or email us at appsdoc@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.

EnterpriseOne Production and Distribution Planning Collaborative Web Client Preface

This preface discusses:

- Common elements in this PeopleBook.
- Related documentation.
- Typographical Conventions and Visual Cues.
- This PeopleBook documents only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then it either requires no additional explanation or is documented with the common elements for the section, chapter, or PeopleBook.

Common Elements Used in This PeopleBook

BLANK PARAGRAPH INSERTED

Integration	Collaborative Web client allow suppliers, customers, and partners to view scheduled changes to Production and Distribution Planning data in real time.
View	Displays the information in the data model in a graphical format. Views can be configured to suit different business needs.
Criteria	Information that is either typed into a field or selected from a list of predefined items.
Query	A set of search criteria used to filter data. By default, 500 data rows are returned.

Related 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 the Customer Connection web site. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full documentation that is delivered on your PeopleBooks CD-ROM.

Note. Before you upgrade, you must check Customer Connection for updates to the upgrade instructions. Updates are posted as the upgrade process is refined.

See Also

Oracle Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

Ordering Printed Documentation

You can order printed, bound volumes of the complete documentation that is delivered on your PeopleBooks CD-ROM. Printed documentation is available for each major release shortly after the software is shipped. Customers and partners can order printed documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the Customer Connection web site, access the Press web site under the Ordering PeopleBooks topic. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact CPI at 800 888 3559.

Email

Send email to CPI at psoftpress@cc.larwood.com.

See Also

PeopleSoft Customer Connection web site, http://www.peoplesoft.com/corp/en/login.asp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.

Typographical Conventions

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

PITTableHeading - Typographical Convention or Visual Cue	PITTableHeading - Description
PITItalics	PITIndicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. PITWe also use italics when we refer to words as words or letters as letters, as in the following: Enter the number 0, not the letter O.
PIT" " (quotation marks)	PITIndicate chapter titles in cross-references and words that are used differently from their intended meanings.
PIT{ } (curly braces)	PITIndicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
PIT[ ] (square brackets)	PITIndicate optional items in PeopleCode syntax.
PITCross-references	PITPeopleBooks provide cross-references either below 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.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Note. Example of an important note.

Warnings

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

Note. Example of a warning.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

CHAPTER 1

Getting Started with Production and Distribution Planning Collaborative Web Client

This chapter provides an overview of Production and Distribution Planning Collaborative Web Client and discusses:

- Production and Distribution Planning Collaborative Web Client business processes.
- Production and Distribution Planning Collaborative Web Client integrations
- Production and Distribution Planning Collaborative Web Client implementations.

Production and Distribution Planning Collaborative Web Client Overview

Production and Distribution Planning Collaborative Web Client is a simple and compact client for Production and Distribution Planning that is deployed over and accessed from the Internet. Production and Distribution Planning is designed to produce optimal deployments and net requirements to direct tactical and operational planning stages for an enterprise. The views, reports, and alerts generated by Production and Distribution Planning are exclusively for use by the enterprise for its planning purposes.

The evolution of the Internet has made collaborative commerce possible between suppliers and customers. Collaborative commerce breaks down the rigidity of traditional business processes and improves information exchange through systems integration and Internet-based communication. Collaborative commerce allows employees, customers, and business partners to share information, which improves trust and facilitates business transactions.

With this application, you can obtain:

- Faster, more comprehensive communication between customers and suppliers
- Elimination of supply chain delays caused by inefficient communication methods
- More accurate and predictable information from which to make and implement business decisions
- Enhanced productivity through joint planning
- Reduced lead time
- Reduced work-in-process carrying costs
- Improved capacity planning
- Improved competitiveness

Production and Distribution Planning Business Collaborative Web Client Process

This diagram displays an overview of the Production and Distribution Planning Collaborative Web Client business process:

Collaborative Web Client Business Process

Install, Configure, Deploy

The Collaborative Web Client application enables users to view and edit Production and Distribution Planning data over the Internet using a web browser. Data sharing and collaboration is made easy using Collaborative Web Client's architecture and easy to use interface. After installation of Collaborative Web Client the System Administrator configures the Production and Distribution Planning application by setting up environment variables, and exporting views, configures the WebSphere Application Server, and installs product licenses. When the Collaborative Web Client application is configured specific data is exported from Production and Distribution Planning and is ready for analysis over the Internet.

Analyze Data

This business process allows you to view and change data originating from the Production and Distribution Planning application using the Collaborative Web Client application. You can select which data that you want to view by using filters, and the custom data queries features in the application. After you have accessed the correct data, you can make changes to the data and then submit these edits to the sponsoring company for review.

Import to Production and Distribution Planning

This business process allows you to import data back to the Production and Distribution Planning application. After viewing and changing data you can submit it to the sponsoring company for review and then import the data back into the Production and Distribution Planning application. The import feature included in the Production and Distribution Planning application allows you to import the data from the Collaborative Web Client back into the Production and Distribution Planning application.

Production and Distribution Planning Collaborative Web Client Integration

Production and Distribution Planning Collaborative Web Client integrates with Production and Distribution Planning.

Production and Distribution Planning uses model data to calculate net requirements and deployments. Often customers, suppliers or partners need to view this information. Collaborative Web Client allows these users to display information and pass back information updates.

Production and Distribution Planning Collaborative Web Client Implementation

You can divide Production and Distribution Planning Collaborative Web Client implementation into these phases:

- Setting Up Production and Distribution Planning Collaborative Web Client
- Exporting Data

Setting Up the Production and Distribution Planning Collaborative Web Client

The steps discussed in this section provide the information necessary to configure Production and Distribution Planning Collaborative Web Client for optimal performance.

Step	Reference
Deploying the Production and Distribution Planning Collaborative Web Client.	Production and Distribution Planning Collaborative Web Client Installation PeopleBook, "Deploying Collaborative Web Client to the WebSphere Application Server."
Sharing the Production and Distribution Planning Collaborative Web Client folder.	Production and Distribution Planning Collaborative Web Client PeopleBook, "Additional Configuration for a Separate Collaborative Web Client Machine."
Mapping the Production and Distribution Planning Collaborative Web Client folders.	Production and Distribution Planning Collaborative Web Client PeopleBook, "Additional Configuration for a Separate Collaborative Web Client Machine."
Configuring the Production and Distribution Planning Collaborative Web Client on the Production and Distribution Planning machine.	Production and Distribution Planning Collaborative Web Client PeopleBook, "Understanding the Desktop."

Exporting Data

The steps discussed in this section provide the information necessary for exporting data from an external application into the Production and Distribution Planning Collaborative Web Client.

Step	Reference
Exporting data from an external system to the Production and Distribution Planning Collaborative Web Client.	Production and Distribution Planning Collaborative Web Client PeopleBook, "Exporting Production and Distribution planning views to Collaborative Web Client."

See Also

About This Documentation, “About This Documentation Preface”“About This Documentation Preface,” page xi

CHAPTER 2

Production and Distribution Planning Collaborative Web Client Desktop

This section provides an overview of the Production and Distribution Planning Collaborative Web Client Desktop and discusses how to configure data in the desktop.

Production & Distribution Planning Collaborative Web Client Desktop Overview

When you log on to Production and Distribution Planning Collaborative Web Client, the desktop appears. The desktop includes the following components:

- Role, Workgroup, and View lists
- Data workspace and Modes
- Alert Meter or Quick Filter
- Status settings
- Timestamp

Role, Workgroup and View Lists

At the top of the Collaborative Web Client desktop are the Role, Workgroup and View lists. You use these lists to choose the data that appears in the Collaborative Web Client desktop.

The Role list shows the roles that a system administrator has assigned to a Production and Distribution Planning user logged into Collaborative Web Client. These roles determine the workgroups and views that the user can display. When you select a role from the Role list, workgroups associated with that role appear in the Workgroup list.

A workgroup is a set of Production and Distribution Planning views that are configured to meet the needs of specific users. When you choose a workgroup from the Workgroup list, all views available to users in the workgroup appear in the View list. You can then choose a Production and Distribution Planning data view, alert view, or report view.

When you first log on to Collaborative Web Client, the Group Alert view appears in the Collaborative Web Client desktop. This view displays Production and Distribution Planning alerts for the workgroup shown in the Workgroup list.

Data Workspace and Modes

The data workspace on the Collaborative Web Client desktop displays Production and Distribution Planning data for the view shown in the View drop-down list. At the top of the data workspace are modes available for the selected view. The mode that you choose determines how data appears in the workspace and what functions are available.

The following modes are available in Collaborative Web Client:

Review. In Review mode, Production and Distribution Planning data appears in the data workspace in tabular form. The data is sorted alphanumerically in ascending order by the contents of the first column. The data appears in either a single table or split-screen format. If the data appears in split-screen format, you can select one row in the summary (top) area of the data workspace and see details pertaining to that row in the detail area below. In Review mode, all data table columns have the same width. However, you can reduce the width of columns so that more columns appear in the window. You can also enlarge columns to show their content more clearly.

- Edit. In Edit mode, you can change the Production and Distribution Planning data in some fields and submit your suggested changes to the sponsoring company.
- Customize. In Customize mode, you can choose which columns to display and which columns to hide when the view data appears in Review mode. You cannot hide columns that are part of the primary key in a data table. You can also rename columns.
- Graph. In Graph mode, a graph of the Production and Distribution Planning view data appears in the data workspace. You can point to a point on the graph to see the exact data value.

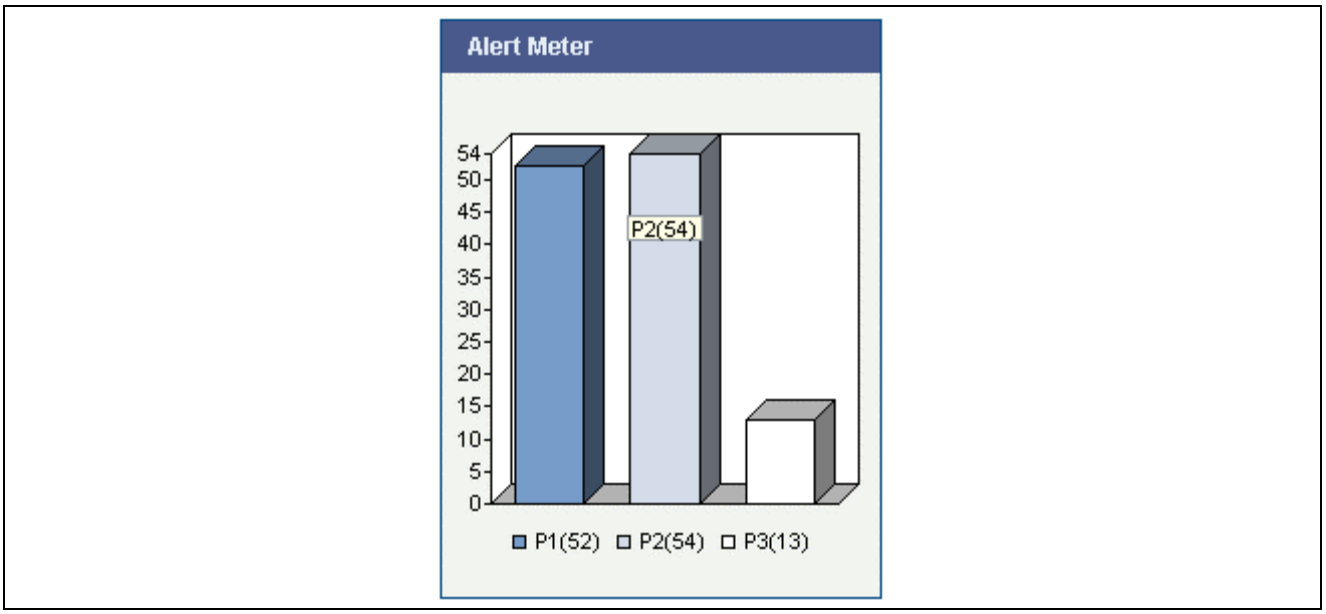
Not all modes are available for every view. For example, users can review, edit or customize data in the Net Requirements view, but can only review or customize data in the Customer Order view.

When you choose a view, the data appears in Review mode if Review mode is available for the view. If Review mode is not available for a view, the data appears in Graph mode.

Alert Meter or Quick Filter

The Alert Meter is a bar chart that summarizes the number of Production and Distribution Planning alerts for the selected workgroup, categorized by priority. The Alert Meter appears only when the Group Alert view appears in the Collaborative Web Client window. From the Alert Meter, you can select an alert priority level and view information about the alerts in the data workspace.

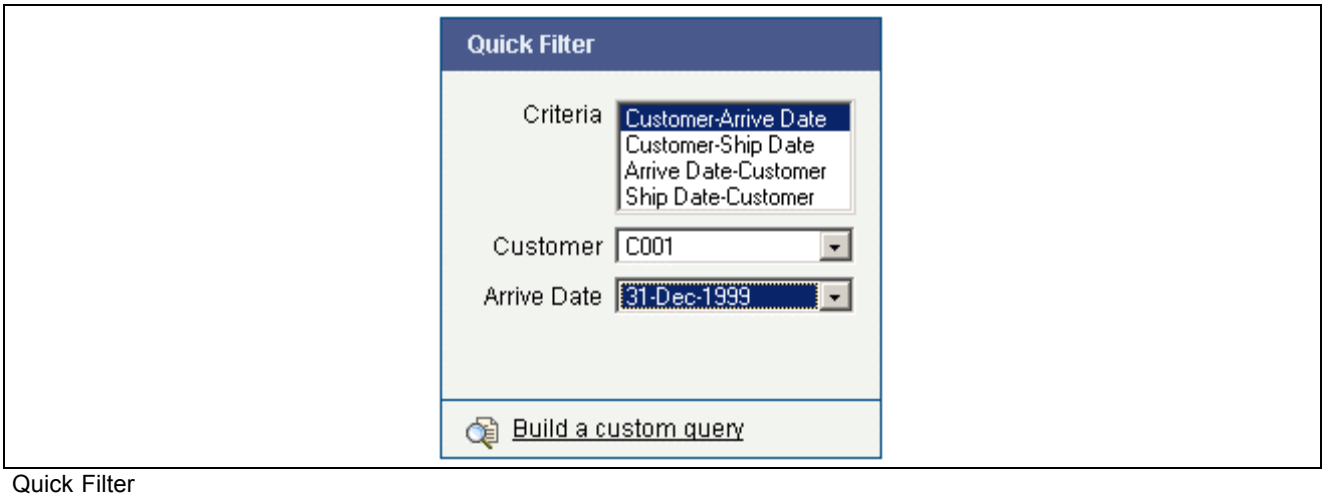
The Alert Meter appears to the left of the data workspace in the Collaborative Web Client desktop.



Alert Meter

When you choose a view other than the Group Alert view, the Quick Filter appears in the same area of the Collaborative Web Client window. The Quick Filter is a set of predefined filters that limit the amount of data that appears in the workspace, making it easier for you to view and interpret the information. The size of the summary screen in a split view can be reduced to show more rows of detail. The filters group data according to predefined criteria, such as product, location, and date.

The Quick Filter appears to the left of the data workspace in the Collaborative Web Client desktop.



Quick Filter

Settings Area

You can quickly determine what data appears in the Collaborative Web Client desktop by checking the Settings area in the bottom left corner of the Collaborative Web Client desktop. When you view a table or graph in the Collaborative Web Client data workspace, not all data from a Production and Distribution Planning view appears at one time. Instead, Collaborative Web Client filters the data using Quick Filters or queries to reduce the amount of data sent from the server and make it easier for users to view and interpret the data in Collaborative Web Client. The Settings area lists the current role, workgroup and view as well as any Quick Filter categories or custom query criteria that specify which data from the Production and Distribution Planning view appears in the data workspace.

Timestamp

When you view data in Review mode, a timestamp appears at the bottom left of the data workspace. ThisLast Exportedtimestamp shows the last time when the sponsoring company updated Production and Distribution Planning data in Collaborative Web Client. When you display new data in the data workspace or refresh the Collaborative Web Client window after a sponsoring company updates Production and Distribution Planning data, the timestamp at the bottom left of the window changes and updated data appears in the data workspace.

When you are working in a view in Edit mode, a timestamp may appear at the bottom right of the workspace. ThisLast Modifiedtimestamp shows the last time you submitted edited data for the view to the sponsoring company. If you have not submitted changes for the view, no timestamp appears at the bottom of the data workspace in Edit mode.

Desktop Data Configuration

This section describes how to:

- View data in tables
- Change column widths
- Show or hide columns
- View data in graphics
- Display values on a graph
- Create link to a view

Views Used With Configuring Data

Form Name	Navigation	Usage
Data Workspace	Collaborative Web Client Desktop, Data Workspace	Returns data to the data table.
Summary Data Area	Collaborative Web Client Desktop, Summary Data Area	Detailed information about that row appears in the lower portion of the data workspace
Review Mode	Collaborative Web Client Desktop, Review Mode	Change the appearance of how the data displays.

Viewing Data in Tables

Access the Data Workspace.

To view data in a table, click the Review link in the data workspace.

If all columns in the view do not fit in the data workspace, you can use a scroll bar below the table to display other data columns. If all rows in the view do not fit in the data workspace, you can use a scrollbar at the right of the table to display other rows.

Viewing Data in Split-Screen Tables

Access the Summary Data Area.

To view data in a split-screen table, in the Summary data area, select the data row for which you want more information.

Detailed information about the data row appears in the detail data area.

Changing Column Widths

Access the Review Mode.

To change column widths:

1. Point to the line between two column headings in a table.

   The cursor turns to a double-headed arrow.

2. Press the left mouse button and drag the line to a new position.

Showing or Hiding Columns

Access the Review Mode.

To show or hide columns:

1. Click the Customize link.

   The data workspace lists the view data columns in Customize mode. The column names appear in the Field name column. A check mark appears in the Display column for any field that appears in Review mode.

   If view data appears in a split-screen format in Review mode, two lists appear in Customize mode. In the top list, you can choose data columns for the summary area. In the lower list, you can choose data columns for the detail area.

   If all column names do not fit in the data workspace, use the scroll bar at the right of the list to review other data columns.

2. Choose one or more of the following options:

   - To hide a data column, click the Display option for the column until the check mark clears.
   - To show a data column, click the Display option for the column until a check mark appears.
   - To show all data columns in the view, click Default.

   Note. If you click Default, you lose any column name changes that you entered.

3. Click Apply.

   The data table appears in Review mode with the columns that you specified.

Changing Column Names

Access the Review Mode.

To change a column name:

1. Click the Customize link.

The data workspace lists the view data columns in Customize mode. The column names appear in the Field name column.

If all column names do not fit in the data workspace, use the scroll bar at the right of the list to display other data columns.

If view data appears in a split-screen format in Review mode, two lists appear in Customize mode. Use the top list for choosing data columns for the summary area and the bottom list for choosing data columns for the detail area.

2. In the Alias field for the column, type the new column name.

   To restore column names to the original names, click Default. If you click Default, a check mark appears in the Display option for every column.

3. Click Apply.

   The data table appears in Review mode with the new column names.

Viewing Data in Graphs

Access the Review Mode.

To view data in a graph, click Graph.

Displaying Values on a Graph

Access the Review Mode.

To display a value on a graph, move the cursor to a point on the graph line.

The value for that point on the graph appears on the screen.

Creating a Link to a View

Access the Review Mode.

To create a link to a view, navigate to the desired view. Select "Add to Favorites" from the top right corner of the view. When the dialog opens, enter a name for the view and click "OK". A link to the view will be added to your "Favorites" list.

CHAPTER 3

Logging on and off the Production and Distribution Planning Collaborative Web Client

This chapter discusses how to:

- Log on to Collaborative Web Client
- Log off Collaborative Web Client

Prerequisites

Before you log on to Production and Distribution Planning Collaborative Web Client:

- Obtain the Collaborative Web Client Internet Web site address from the sponsoring company. Bookmark the address for future use. You might also receive links to specific views within Collaborative Web Client.
- Obtain the Production and Distribution Planning username and password that are needed for logging on to Collaborative Web Client.

Logging On to Collaborative Web Client

Access the Collaborative Web Client Internet Web site.

To log on to Collaborative Web Client:

1. From the sponsoring company's Web site, choose the Supply Chain Planning Logon option.
2. On the Logon window, enter your Production and Distribution Planning user ID and password.
3. Click Sign In.

   If you enter a correct user ID and password combination, the Collaborative Web Client desktop appears. If you enter an incorrect user ID or password, the system resets the User Id and Password fields.

Logging Off Collaborative Web Client

Access the Collaborative Web Client Desktop.

To log off of Collaborative Web Client:

Click Sign out.

CHAPTER 4

Production and Distribution Planning Collaborative Web Client Views

This chapter provides an overview of Collaborative Web Client views and discusses how to:

- Choose a view.
- Filter data in a view.
- Filter data using the quick filters.
- Filter data using the filter bar and your own criteria.
- Filter alerts using the alert meter.

Collaborative Web Client Views Overview

When you first log in to Collaborative Web Client, the Group Alert view appears. The Group Alert view shows alerts for the current workgroup. To see other Production and Distribution Planning data, you must choose another view.

When you choose a view other than the Group Alert view, Collaborative Web Client filters the data that appears in the Collaborative Web Client window. Collaborative Web Client filters the data to reduce the amount of data sent from the server and makes it easier for users to view and understand the data. To select which data from the Production and Distribution Planning view appears in the data workspace, you can choose a Quick Filter that specifies predetermined criteria.

If you do not want to restrict data in the view by predefined criteria, you can build a custom query to obtain data from the server.

Data appears in Collaborative Web Client in tables or in graphs. When you first select a view, the data usually appears in a table in Review mode. If Review mode is not available for a view, the data appears in Graph mode. When data appears in tables, you can change column widths, choose the columns that are displayed and display detailed data for some views. When you display data in graphs, you can view exact data values for points along the graph.

When you choose a view, you can create a link to the view to display the page and data that you have been viewing.

You can choose a Production and Distribution Planning view using the Role, Workgroup and View lists at the top of the Collaborative Web Client window. The Production and Distribution Planning system administrator determines which views are available to each user by assigning roles. When you choose a role from the Role list, workgroups associated with that role appear in the Workgroup list. When you select a workgroup, all views, alerts and reports available to users in the workgroup appear in the View list. You can then choose a view from the View list.

Choosing a View

This section discusses how to choose a view in Collaborative Web Client.

Prerequisites

Before choosing a view:

- Select a role from the Role list.
- Select a workgroup from the Workgroup list.

View Used With View Processes

Form Name	Navigation	Usage
View list	Collaborative Web Client Desktop, View list	Access to all views.

Choosing a View

Access the View lists.

To choose a view:

1. Select a view.

   To view alerts, choose Group Alert from the View list.

2. Click the Display View icon.

   If you choose a view other than the Group Alert view, the Quick Filter area displays criteria by which you can filter the data. View data that matches the first option in the Quick Filter Criteria list appears in the data workspace.

Filtering Data in a View

When you display a Production and Distribution Planning data or reporting view in the Collaborative Web Client data workspace, not all data from the view appears at one time. Instead, you can select data from the Production and Distribution Planning view using predefined criteria in the Quick Filter. These criteria appear in the Quick Filter area at the left side of the data workspace. You can further restrict the amount of data that appears in the Collaborative Web Client window by creating your own filter criteria in the filter bar.

In the Group Alert view, quick filters are not available. However, you can create your own filter criteria or use the Alert meter to choose alerts with a specific priority level.

Filtering Data Using the Quick Filters

The Collaborative Web Client desktop allows you to filter Production and Distribution Planning data using Quick Filters. Quick Filters use predetermined criteria that allow you to see data in a view that is important to your business priorities.

The Quick Filter area allows you to specify predetermined criteria. The Criteria list contains all of the predetermined criteria available to filter a certain view. After you choose an option from the Criteria list, lists become available that contain values that correspond with the criteria. For example, if you choose the Location-Product criteria, the system displays a Location list and a Product list, allowing you to choose a value for each.

When you first choose a data or reporting view, data that matches the first option in the Quick Filter Criteria list appears in the data workspace. You can then use the lists to select values, allowing you to display other view data.

View Used With Quick Filtering Process

Form Name	Navigation	Usage
Quick Filter	Collaborative Web Client Desktop, Criteria List	The Criteria list contains all of the predetermined criteria available to filter a certain view.

Filtering Data Using Quick Filter Criteria

Access the Quick Filter.

To filter data using Quick Filter criteria:

1. Select criteria from the Criteria list.
2. Choose a value from each list that appears.

   The system displays data that matches your Quick Filter criteria in the data workspace.

Filtering Data Using The Filter Bar and Your Own Criteria

You can further limit the amount of data that appears in a table by using the filter bar at the bottom of the table. You can type your own criteria in the filter bar or choose a data row that contains values that you want to use as filters.

When data appears in a split-screen format, a filter bar appears at the bottom of the summary data area and at the bottom of the detail data area. You can filter data in each area of the workspace with separate criteria.

View Used With Filter Bar Process

Form Name	Navigation	Usage
Filter Bar	Collaborative Web Client Desktop, Filter Bar	Limits the amount of data that appears in a table.

Filtering Data Using the Filter Bar and Your Own Criteria

Access the Filter Bar.

To filter data using your own criteria:

1. Enter a filter value in the appropriate column, and then press Enter.
2. Click the fields in the filter bar that contain values that you want to use to filter data.

   Data rows with values that match the specified criteria appear in the data workspace. To stop filtering the data, click the fields in the filter bar again.

Filtering Alerts Using the Alert Meter

When you review alerts in the Group Alert view, you can review alerts with a specific priority level by using the Alert Meter located to the left of the data workspace. The Alert Meter is a bar chart that summarizes by priority the current alerts for the selected workgroup.

View Used To Filter Alerts

Form Name	Navigation	Usage
Alert Meter	Collaborative Web Client Desktop, Alert Meter	Review alerts with a specific

Filtering Alerts Using the Alert Meter

Access the Alert Meter.

To filter alerts using the Alert Meter:

Double-click a bar for the priority level of the alerts that you want to review in the data workspace.

Alert information for that priority appears in the data workspace.

CHAPTER 5

Creating a Custom Query

This chapter provides an overview of data queries and discusses how to query data.

Understanding Data Queries

When you display a view, Quick Filters restrict the amount of Production and Distribution Planning data that appears in the data workspace. If you want to obtain data from the view that has not been filtered by predefined criteria, you can build a custom query.

A custom query allows you to specify up to five criteria; the data rows must match the criteria that you specify.

When you build a custom query for a view that appears in split-screen format (summary and detail areas), a custom query filters the summary records.

If a query returns more than 500 rows, a warning message appears. You can either view the first 500 rows from the query or change your query to reduce the number of rows that match your criteria.

You cannot build a custom query in reporting views or in the Group Alert view. If you customize a view so that a column does not appear in Review mode, you cannot use that field name when you build a custom query.

By default, the system returns a maximum of 500 data rows for a custom query. You can change the maximum query size, as well as other properties, by editing the admin properties file in the appropriate directory. However, increasing the maximum query size too much can adversely affect Collaborative Web Client performance.

The directory location, which differs depending on your operating platform and WebSphere version located in "*<WebSphere install path>/installedApps/cwc.ear/cwc.war/WEB-INF/conf" if you are using UNIX, and"<WebSphere install path>*\installedApps\cwc.ear\cwc.war\WEB-INF\conf" if you using Windows.

Querying Data

This section discusses how to:

- Query data.
- Change the maximum query size.

Views Used With Query Processes

Form Name	Navigation	Usage
Quick Filter	Collaborative Web Client Desktop, Quick Filter	The Criteria list contains all of the predetermined criteria available to filter a certain view.

Querying Data

Access the Quick Filter.

To query data:

1. Click Build a custom query.
2. From the Field Name drop-down list, choose a field that you want to search.
3. In the Operation drop-down list, choose an operation.

   Available operations depend on the Field Name data type.
4. In the Value field, type a value.

   Note. Values are case-sensitive. In addition, if the field name data type is a date, you can click the calendar icon beside the Value field to choose a date from the calendar.
5. To specify more search criteria, repeat steps 2-4.
6. Do one of the following:
   - To search for records that match all of the search criteria you specify, click Match All.
   - To search for records that match any of the search criteria you specify, click Match Any.

   If a message warns you that the result of the query exceeds the maximum query size, you can either show the incomplete data set or refine your query.
7. Click Search.

   The data workspace displays data rows from the view that match your criteria.

Changing the Maximum Query Size

Access the admin.properties File.

To change the maximum query size:

1. Open the admin.properties file in a text editor such as Microsoft Notepad
2. Edit the following line:

   ```
   MaxQuerySize =
   ```

   value where *value* is the maximum number of data rows that the system returns in a query.
3. Save the file and exit the text editor.
4. Restart the application server.

CHAPTER 6

Downloading and Printing Data

This chapter provides overview information about downloading and printing data and discusses how to:

- Download data in tab-delimited format
- Download data to Microsoft Excel
- Print data

How to Download and Print Data

You can print data that appears in the data workspace in a standard table format. The view name and time stamp are printed as headers along the top of the tables. The system prints only the records that appear in the data workspace.

If you choose a summary record for which detailed information is available, the system prints both summary and detailed information. If no detailed information is available for a summary record, the message "No summary row selected" appears at the bottom of the printed table.

You can download or print data from Collaborative Web Client for review. You can also download Collaborative Web Client data to use as demand data in a planning system.

You can download data from tables or graphs in tab-delimited format (.tab extension) or in a comma-separated format (.csv extension). The comma-separated format can be opened using Microsoft Excel. If you do not require the downloaded data to be formatted, choose the tab-delimited format. This format places the data in columns that are separated by tabs. If you want to open the data in Excel, choose the comma-separated format.

When you download data, you download the entire view data set, not just the filtered data that appears in the data workspace.

Note. Files downloaded from Collaborative Web Client can be large and can contain many rows of data.

View Used With Downloading Data

Form Name	Navigation	Usage
Data Workspace	Collaborative Web Client Desktop, Data Workspace, Select a view	Displays all available data.

Downloading Data to Microsoft Excel

Access the Data Workspace.

To download data to Microsoft Excel:

1. Click the Download Excel button.
2. In the file download dialog box, choose one of the following options:
   - Save the file.
   - Open the file.

     Opening the file launches Microsoft Excel. When you view the data in Microsoft Excel, some of the columns with entries that exceed the column width might display the ### sign. To review the data, increase the column widths.

Download Data in Tab-Delimited Format

Access the Data Workspace.

To download data in tab-delimited format:

1. Click the Download Tab Delimited Format icon.
2. In the file download dialog box, do one of the following:
   - Save the file.
   - Open the file.

Printing Data

Access the Data Workspace.

To print data:

1. Click the Printable Version button.

   The data appears in a separate browser window.
2. Print the page using the print function in your web browser.

CHAPTER 7

Changing Data

This chapter provides an overview on editing data and discusses how to:

- Edit data
- Reset changed data
- View data changes

Data Editing

In some views, you can suggest data changes and submit these edits to the sponsoring company for review. Production and Distribution Planning users at the sponsoring company can then review your changes and decide whether they agree with the edited data. If they agree with the data, they can update the Production and Distribution Planning repository with the submitted changes.

You can review the data changes that you have submitted to your sponsoring company. When you first open the Change History for a view, you see all of the data that appeared in the data workspace when you submitted data changes. You can then filter the data to show only the data row changes. Each view has a separate Change History.

By default, the Change History saves all of the data that appeared in the data workspace when changes were submitted to the sponsoring company in the past seven days. You can change the number of days of data that appear in the Change History. You do so by editing the admin.properties file in the appropriate directory.

The following table identifies the directory location:

Platform	Directory
UNIX	<*WebSphere install path*>/installedApps/cwc.ear/cwc.war /WEB-INF/conf
Windows	<*WebSphere install path*>\installedApps\cwc.ear\cwc.war \WEB-INF\conf

For example, after reviewing the Production and Distribution Planning Deployment view using Collaborative Web Client, a supplier might realize that her company cannot provide sufficient materials for a requested shipment. She can then enter a revised shipment date and quantity in Collaborative Web Client, along with comments explaining the change, and then submit the edited data to the sponsoring company. A Production and Distribution Planning user at the sponsoring company can then review the changes and import the edited data into the Production and Distribution Planning repository if the revised shipment information is acceptable.

The following table describes the fields and associated views In Collaborative Web Client that you can edit:

View	Fields
Deployment	• Ship Date • Plan Quantity
Net Requirements	• Earliest Production Date • Net Quantity

How to Edit Data

This section explains how to edit data in Collaborative Web Client.

Prerequisite

Before editing data:

- Ensure that the Production and Distribution Planning model servers are running.
- Verify that the Production and Distribution Planning model servers are using the same repository to which Collaborative Web Client is connected.
- Display the data that you want to change.
- If you make changes to view data, you can reset the changes. You cannot reset changes after you leave Edit mode.

View Used With Editing Data

Form Name	Navigation	Usage
Data Workspace	Collaborative Web Client Desktop, Data Workspace, Edit	Displays all available data.

How to Edit Data

Access the Data Workspace.

To edit data:

1. In Edit mode, click the Approved column of the data row that you want to change to deselect it.

   The check mark disappears. Fields become editable. By default, all of the records are marked as Approved.

2. Enter the new data in the required field.

   If you enter an invalid value, the system displays the data in red and disables the Submit Change button.

If you change the Plan Quantity in the Deployment View or Net Quantity in the Net Requirements view, the system automatically calculates the values in the Change and Cumulative Change fields. The Change field displays the quantity change in the current record. The Cumulative Change field displays the quantity change in all of the records in the window. If the data in the Data Workspace includes more than one product, the Cumulative Change field does not appear.

3. Click Submit Change.

Note. If you exit the Edit mode without submitting your changes, you lose your changes.

See Also

Changing Data, How to Edit Data, *Production and Distribution Planning Collaborative Web Client*

Resetting Changed Data

Access the Data Workspace.

Once you are in edit mode, to reset changed data:

Click Reset.

All of the new data that you entered in the view is cleared.

Viewing Data Changes

Access the Data Workspace.

To view data changes.

1. In Edit mode, click Change History.

   If you have submitted changes for the view, a Change History window displays all of the data records for that view when you submitted data to the sponsoring company. The Update Status column shows whether the Collaborative Web Client user has rejected or accepted each Production and Distribution Plan data row.

2. Type rejected in the shaded field at the bottom of the Update Status column.

   The Change History window displays the data row changes that you submitted for the view.

Changing the Number of Days of Data in the Change History

Access the admin.properties File.

To change the number of days of data in the Change History:

1. In a text editor such as Microsoft Notepad, open the admin.properties file.
2. Edit the following line:

   ```
   MaxLogDays =
   ```

   value where *value* is the number of days of data changes that are saved in the Change History.

3. Save the file and exit from the text editor.
4. Restart the application server.

Importing Collaborative Web Client Edits into Production and Distribution Planning

Access the Collaborative Web Client log files.

To import Collaborative Web Client edits into Production and Distribution Planning:

1. Review submitted data changes in the log files.

   Log files are saved in the *path*/PDP/vers_*x.x*/*repository*/import directory in UNIX or in the *drive*:*path*\PDP\vers_*x.x**repository*\import directory in Windows, where:

   - *path* represents the directory where you installed Production and Distribution Planning
   - *drive* represents the drive that you are using in Windows
   - *repository* represents the name of the repository that you are using in Production and Distribution Planning.

     The log files are saved as HTML files.
2. Navigate to one of the following directories:
   - In UNIX:

     path/PDP/vers_*x.x*/cwc/scripts

     where *path* is the directory where you installed Production and Distribution Planning and x.x is the version.
   - In Windows:

     drive:*path*\PDP\vers_*x.x*\cwc\scripts

     where *path* is the directory where you installed Production and Distribution Planning and x.x is the version.
3. Type one of the following commands at a command line prompt:
   - For UNIX:

     ```
     ./import.sh
     ```
   - For Windows:

     ```
     import.ba
     ```

     _Continue2 -

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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