ORACLE®

JD EDWARDS WORLD

JD Edwards World

Working with Electronic Document Delivery

Version A9.2

Revised – September 2, 2009

Copyright Notice
Copyright © 2009, Oracle. All rights reserved.
Trademark Notice
Oracle is a registered trademark of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.
License Restrictions Warranty/Consequential Damages Disclaimer
This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.
Subject to patent protection under one or more of the following U.S. patents: 5,781,908; 5,828,376; 5,950,010; 5,960,204; 5,987,497; 5,995,972; 5,987,497; and 6,223,345. Other patents pending.
Warranty Disclaimer
The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.
Restricted Rights Notice
If this software or related documentation is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:
U.S. GOVERNMENT RIGHTS
Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal
Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle USA, Inc., 500 Oracle Parkway, Redwood City, CA 94065.
Hazardous Applications Notice
This software is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure the safe use of this software. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software in dangerous applications.
Third Party Content, Products, and Services Disclaimer
This software and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third party content, products and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third party content, products or services.
Contains GNU libgmp library; Copyright 1991 Free Software Foundation, Inc. This library is free software which can be modified and redistributed under the terms of the GNU Library General Public License.
Includes Adobe PDF Library, Copyright 1993-2001 Adobe Systems, Inc. and DL Interface, Copyright 1999-2008 Datalogics Inc. All rights reserved. Adobe is a trademark of Adobe Systems Incorporated.
Portions of this program contain information proprietary to Microsoft Corporation. Copyright 1985-1999 Microsoft Corporation.
Portions of this program contain information proprietary to Tenberry Software, Inc. Copyright 1992-1995 Tenberry Software, Inc.
Portions of this program contain information proprietary to Premia Corporation. Copyright 1993 Premia Corporation.
This product includes code licensed from RSA Data Security. All rights reserved.
This product includes software developed by the OpenSSL Project for use in the OpenSSL Toolkit (http://www.openssl.org/).
This product includes cryptographic software written by Eric Young (eay@cryptsoft.com).
This product includes software written by Tim Hudson (tjh@cryptsoft.com). All rights reserved.
This product includes the Sentry Spelling-Checker Engine, Copyright 1993 Wintertree Software Inc. All rights reserved.
Open Source Disclosure
Oracle takes no responsibility for its use or distribution of any open source or shareware software or documentation and disclaims any and all liability or damages resulting from use of said software or documentation. The following open source software may be used in Oracle's JD Edwards World products and the following disclaimers are provided.
This product includes software developed by the Apache Software Foundation (http://www.apache.org/). Copyright (c) 1999-2000 The Apache Software Foundation. All rights reserved. THIS SOFTWARE IS PROVIDED "AS IS" AND ANY EXPRESSED OR IMPLIED WARRANTIES, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE DISCLAIMED. IN NO EVENT SHALL THE APACHE SOFTWARE FOUNDATION OR ITS CONTRIBUTORS BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL, EXEMPLARY, OR CONSEQUENTIAL DAMAGES (INCLUDING, BUT NOT LIMITED TO, PROCUREMENT OF SUBSTITUTE GOODS OR SERVICES; LOSS OF USE, DATA, OR PROFITS; OR BUSINESS INTERRUPTION) HOWEVER CAUSED AND ON ANY THEORY OF LIABILITY, WHETHER IN CONTRACT, STRICT LIABILITY, OR TORT (INCLUDING NEGLIGENCE OR OTHERWISE) ARISING IN ANY WAY OUT OF THE USE OF THIS SOFTWARE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGE.

Table of Contents

Working with Electronic Document Delivery 2

Installing Prerequisite Software 6
Setting up EDD 10
Setting up Java System Properties 10
Setting up xdodelivery.cfg Configuration File 11
Installing BI Publisher JAR files 14
Setting up UDCs for EDD 15
Setting up EDD Configuration Parameters 16
Setting up EDD Substitution Variables 20
Working with E-mail Lists 26
E-mail List Selection 26
E-mail Lists Maintenance 28
EDD E-mail Selection 30
EDD E-mail Lists Selection 31
Working with Distribution Profiles 32
Distribution Profile Selection 32
Distribution Profile Maintenance 34
Distribution Profile Detail 38
Working with E-mail Templates 39
E-mail Template Selection 40
E-mail Template Maintenance 41
Working with Transformation Templates 43
Transformation Template Selection 43
Transformation Template Maintenance 45
Distributing a DREAM Writer Report with EDD 47
Bursting a Report with EDD World Bursting 49
Distributing Information Interactively with EDD 52
Sending an Ad hoc E-mail with EDD 54
Appendix A - EDD Files 58
Appendix B – DREAM Writer Reports Enabled for World Bursting 59

Working with Electronic Document Delivery

Electronic Document Delivery (EDD) provides various methods for JD Edwards World users to distribute documents created by JD Edwards World.

EDD allows you to distribute reports via e-mail, File Transport Protocol (FTP), Secure File Transport Protocol (SFTP), or interactive inquiries via e-mail. EDD was integrated with Import/Export to allow report creation, transformation (optionally), and distribution in one step.

You can complete Simple Electronic Document Delivery using only JD Edwards World functionality, including:

- The ability to e-mail or FTP DREAM Writer or World Writer reports in a batch mode using Export
- The ability to e-mail interactive inquiries using Export
- Simple Bursting based on Address Number
- XSL Transformations of XML documents
- The ability to pre-format e-mails using templates
- The ability to specify E-mail Lists and Distribution Profiles

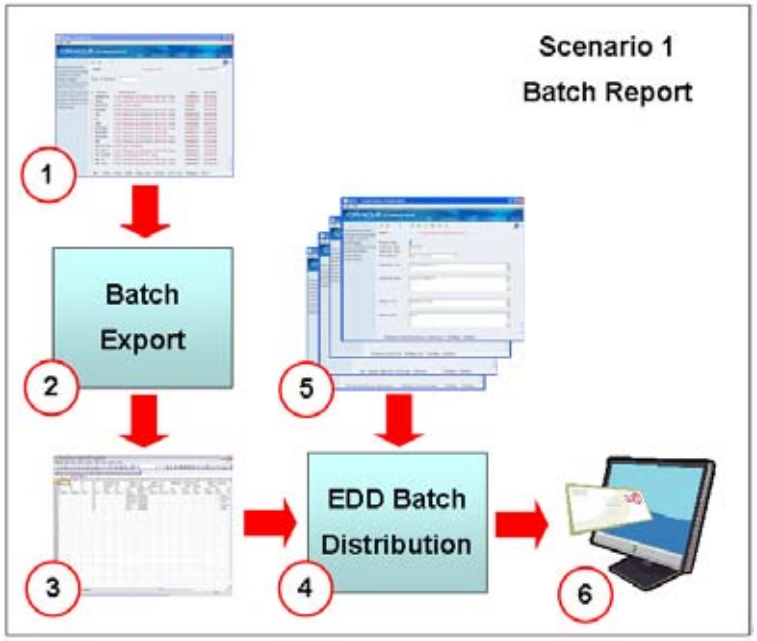
Advanced Electronic Document Delivery includes all the Simple Electronic Document Delivery features and also utilizes Oracle BI Publisher for:

- The ability to use SFTP to distribute DREAM Writer or World Writer reports in a batch mode using Export
- "Pixel perfect" report formatting using templates developed using familiar tools such as Microsoft Word or Adobe Acrobat
- Advanced Bursting
- More output formats, such as PDF, RTF, HTML
- More output methods, such as Fax, SFTP, EDI, and EFT

Using EDD Overview – Scenario 1

There are three main scenarios where EDD can be useful in sending documents produced from JD Edwards World.

In the first scenario, a user wants to run a report and distribute it to multiple recipients. Optionally, the user can use a pre-formatted e-mail subject line and body text, a pre-defined list of recipients, and can transform the document before delivery. The flow for this scenario can be described as follows:



1. User runs a DREAM Writer that is enabled for Export or a World Writer, with a version specifying Export and Distribution Parameters.

2. After the report is produced, an export file is created.

3. The export file can be any format supported by Export.

4. If distribution was requested on the Export Parameters, the export file is sent to EDD in a batch mode.

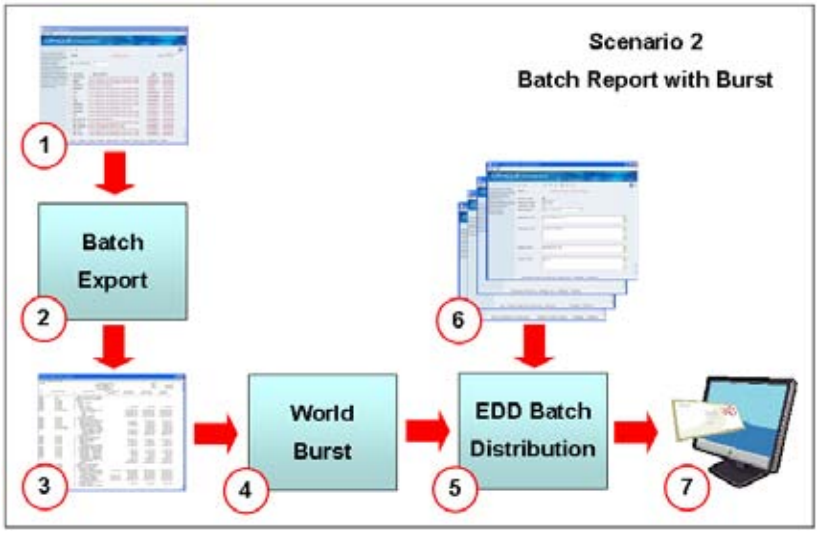
5. The EDD batch distribution can apply E-mail Templates, Distribution Profiles, and Transformation Templates to create the output.

6. The output can be the export file sent via FTP or SFTP, or an e-mail with the export file attached. The output can also be sent through Oracle BI Publisher.

Using EDD Overview – Scenario 2

In the second scenario, a user wants to run a report and burst it for sending individual report segments to recipients, such as a customer or supplier.

Optionally, the user can use a pre-formatted e-mail subject line and body text, use a pre-defined list of recipients, and transform the document before delivery. The flow for this scenario can be described as follows:



1. User runs a DREAM Writer that is enabled for Export with Burst or a World Writer, with a version specifying Export and Distribution Parameters. Report has Address Number on it.

2. After the report is produced, an export file is created.

3. The export file can be any format supported by Export.

4. The World Burst breaks the report into multiple segments by Address Number.

5. If distribution was requested on the Export Parameters, the export file is sent to EDD in a batch mode.

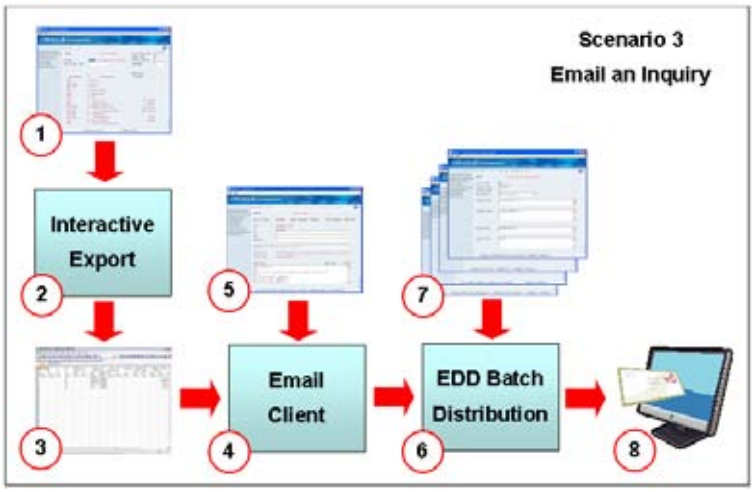
6. The EDD batch distribution can apply E-mail Templates, Distribution Profiles, and Transformation Templates to create the output.

7. The output is sent as an e-mail with the export file attached. E-mail address is retrieved via the Address Number.

Using EDD Overview – Scenario 3

In the third scenario, a user wants to send an interactive inquiry to a recipient (or recipients).

Optionally, the user can use a pre-formatted e-mail subject line and body text, use a pre-defined list of recipients, and can transform the document before delivery. The flow for this scenario can be described as follows:



1. User performs an inquiry in an interactive program enabled for Export.

2. An export file is created.

3. The export file can be any format supported by Export.

4. If distribution was requested on the Export Parameters, the export file is sent to the EDD E-mail client in an interactive mode.

5. The user can review and modify the e-mail interactively before it is sent. Recipient's e-mail address can be keyed manually or selected from Address Book.

6. When the user requests Send, the EDD E-mail Client sends the e-mail to the EDD Batch Distribution program.

7. The EDD batch distribution can apply E-mail Templates, Distribution Profiles, and Transformation Templates to create the output.

8. The output is sent as an e-mail with the export file attached. The output can be sent through Oracle BI Publisher as well.

EDD Components

EDD includes the following components:

- EDD RPG programs beginning with JD Edwards World release A9.2
- Modifications to Import/Export RPG programs beginning with JD Edwards World release A9.2
- EDD Java programs packaged in a .zip file and available in a separate download on the World Update Center, refer to the A9.2 Minimum Technical Requirements for update information
- Optionally, Oracle BI Publisher for advanced distribution tasks

EDD Tasks

EDD includes the following tasks:

- Setting up EDD
- Working with E-mail Lists
- Working with Distribution Profiles
- Working with E-mail Templates
- Working with Transformation Templates
- Distributing a DREAM Writer Report with EDD
- Bursting a Report with EDD
- Distributing information interactively with EDD
- Sending an Ad hoc E-mail with EDD E-mail Client

Before You Begin

- JD Edwards World recommends that you review Action Code Security and the security on the IFS before making Import/Export available to users
- Ensure that you have proper authority before creating an IFS directory
- You must have a User Display Preferences record before you can set up Import/Export preferences
- Electronic Document Delivery uses files stored in the IFS on your AS/400, System i, or System i5 server. Refer to Setting up Import/Export in the Work with Import Export section of the *Technical Foundation Guide* for instructions on setting up and working with directories in the IFS

  Note: Users can create IFS directories with EBCDIC or ASCII CCSIDs. Directories used for EDD must be set up with an ASCII CCSID (see *Setting up Import/Export* in the *Work with Import/Export* section of the *Technical Foundation Guide* for more information.

- Before starting the installation steps, map a drive to your IFS root folder. Instructions for mapping a drive to an IFS folder are contained in *Setting up Import/Export* in the *Work with Import/Export* section of the *Technical Foundation Guide*.
- EDD requires a JD Edwards World Software Update available from the Update Center. Download and install A92EDDJava, SAR number 8920763

Installing Prerequisite Software

EDD requires JAVA API files that are not delivered with the product. Download eleven jar files using the following instructions:

To download activation.jar (JavaBeans(TM) Activation Framework Specification)

1. Access the download page using the following link:

   http://java.sun.com/products/archive/javabeans/jaf11.html

2. Click Download.

3. Accept the software license and then click the jaf-1_1-fr.zip link.

4. Click Save and select a location to download the zip file.

5. Navigate to the folder where the jaf-1_1-fr.zip file was downloaded and open the zip file using WinZip.

6. Select the activation.jar file and click Extract.

7. Extract the activation.jar file to folder:

   iSeries\root\World_EDD_JAVA\lib

   (where iSeries is server where EDD is installed).

To download mail.jar (JavaMail(TM) API Design Specification)

1. Access the download page using the following link:

   http://java.sun.com/products/javamail/javamail-1_4.html

2. Click Download.

3. Accept the software license and then click the javamail-1_4.zip link.

4. Click Save and select a location to download the zip file.

5. Navigate to the folder where the javamail-1._4.zip file was downloaded and open the zip file using WinZip.

6. Select the mail.jar file and click Extract.

7. Extract the mail.jar file to folder:

   iSeries\root\World_EDD_JAVA\lib

   (where iSeries is server where EDD is installed).

To download jt400.jar (IBM Toolbox for Java / JTOpen)

1. Access the download page using the following link:

   http://sourceforge.net/projects/jt400

2. Click the Download link.

3. Click the jtopen_6_4.zip link to download the file.

4. After the download completes, the jtopen_6_4.zip file opens in WinZip. Otherwise, navigate to the folder where the jtopen_6_4.zip file was downloaded and open the file using WinZip.

5. Select the jt400.jar file and click Extract.

6. Extract the jt400.jar file to folder:

   iSeries\root\World_EDD_JAVA\lib

   (where iSeries is server where EDD is installed).

To download commons-net-1.4.1.jar (Apache Common)

1. Access the download page using the following link:

   http://commons.apache.org

2. Select the Releases (mirrored) link under Download in the left menu.

3. Select the Net link under Downloads.

4. Select the 1.4.1.zip link under 1.4.1->Binary.

5. Click Save, select a folder for the download, and then click Save.

6. After the download completes, navigate to the folder where the commons-net-1.4.1.jar.zip file was downloaded.

7. Open the zip file using WinZip.

8. Select the commons-net-1.4.1.jar file and click Extract.

9. Extract the commons-net-1.4.1.jar file to folder:

   iSeries\root\World_EDD_JAVA\lib

   Using your mapped drive (where iSeries is server where EDD is installed).

To download jaxb-api.jar (Java Architecture for XML Binding)

1. Access the download page using the following link:

   http://www.java2s.com

2. Click the Jar File Download link in the left menu.

3. Find the jaxb-api.jar file (Ctrl-F for search box) and click the link to download.

4. On the Save Dialog screen, click Save.

5. Select a location to download the zip file and then click Save.

6. Navigate to the folder where jaxb-api.jar.zip file was downloaded and open the zip file using WinZip.

7. Select the jaxb-api.jar file and click Extract.

8. Extract the jaxb-api.jar file to folder:

   iSeries\root\World_EDD_JAVA\lib

   Using your mapped drive (where iSeries is server where EDD is installed).

To download log4j-1.2.14.jar (Apache Java Logging Framework)

1. Access the download page using the following link:

   http://archive.apache.org/dist/logging/log4j/1.2.14/

2. Right-click the logging-log4j-1.2.14.zip link and select Save Target As.

3. Select a location to download the zip file.

4. Navigate to the folder where logging-log4j-1.2.14.zip file was downloaded and open the zip file using WinZip.

5. Select the log4j-1.2.14.jar file and click Extract.

6. Extract the selected file to folder:

   iSeries\root\World_EDD_JAVA\lib

   Using your mapped drive (where iSeries is server where EDD is installed).

To download crimson_1_1_1_3.jar, jaxen.jar, javax-ssl-1_1.jar, xml.jar, and xmlparserv2.jar (Components from Oracle Container for Java (OC4J)).

1. Access the download page using the following link:

   http://www.oracle.com/technology/tech/java/oc4j/index.html

2. Click Free Download.

3. Accept the OTN License Agreement and supply/create an Oracle.com account.

4. Under the Version 10.1.3.3.0 heading, right-click the Oracle Containers for J2EE 10g (OC4J) link and select Save Target As.

5. Select a location to download the zip file.

6. Navigate to the folder where oc4j_extended_101330.zip file was downloaded and open the zip file using WinZip.

7. Select the following files (hold down the Ctrl key to select multiple files) and click Extract:
   - crimson_1_1_3.jar
   - javax-ssl-1_1.jar
   - jaxen.jar
   - xml.jar
   - xmlparserv2.jar
8. Extract the selected jar files to folder:

   iSeries\root\World_EDD_JAVA\lib

   Using your mapped drive (where iSeries is server where EDD is installed).

Setting up EDD

To use EDD features, you must have access to a shared directory in the IFS on your AS/400, System i, or System i5 server. If you have access to a shared directory, you can map a network drive to access the shared IFS directory from a Windows PC. The IFS directory used for EDD must be set up with an ASCII CCSID so the distributed documents are in the correct format.

Additionally, there are settings for Import/Export that you access from the User Display Preferences program (P00923), which makes EDD more convenient to use.

This section includes the following tasks:

- Setting up Java system properties
- Setting up the xdodelivery.cfg configuration XML file
- Installing BI Publisher JAR files
- Setting up UDCs for EDD
- Setting up EDD Configuration Parameters
- Setting up EDD Substitution Variables

Setting up Java System Properties

The SystemDefault.properties file sets up default parameters for the Java Virtual Machine (JVM) on the AS400, System i, or System i5. This file is loaded by the JVM at startup and retains the parameters for the life of the JVM. The properties file is located at root/QIBM/UserData/Java400 and must be modified using the WRKLNK command. Example:

- WRKLNK ('/QIBM/USERDATA/JAVA400')
- Enter a 5 on the JAVA400 line to display the directory
- Enter a 2 on the SystemDefault.properies file to edit

Edit the SystemDefault.properties file by adding the following line to the file:

XDO_TOP=/World_EDD_JAVA

This parameter can be added after the last line of the file and defines the base directory for the EDD applications to find configuration and setup files.

Setting up xdodelivery.cfg Configuration File

The xdodelivey.cfg file is a configuration file used throughout the EDD process. This file must be stored in the /World_EDD_JAVA/resource directory. This file contains:

- Server information for each of the delivery options (e-mail, FTP, SFTP)
- Information such as the server IP address, port number, and user information

Might contain one or more server elements for each delivery type where each of the server elements has the following structure:

<server name="SMTP1" type="smtp_e-mail" default="true">

<Additional elements>

</server>

Where:

- server name: an identifier used for this server, used within other EDD applications to retrieve the server information
- type: type of server, this identifies the type of server (smtp_e-mail, FTP, SFTP, or system)
- default: an optional attribute that identifies this server as the default for this type of server

There can only be one default server for each server type, if multiple severs for the same type are marked as default, the first server is used.

The following elements are supported for <server type=”smtp_e-mail”>

Element	Description
<host>	Specifies the host name or IP address for this server.
<port>	Specifies the port for this server.
<username>	Specifies the user name for this server, if required.
<password>	Specifies the user password for this server, if required.

The following elements are supported for <server type=”FTP”>

Element	Description
<host>	Specifies the host name or IP address for this server.
<port>	Specifies the port for this server.
<username>	Specifies the user name for this server, if required.

Element	Description
<password>	Specifies the user password for this server, if required.

The following elements are supported for <server type=”SFTP”>

Element	Description
<host>	Specifies the host name or IP address for this server.
<port>	Specifies the port for this server.
<username>	Specifies the user name for this server, if required.
<password>	Specifies the user password for this server, required if you choose password authentication.
<authType>	Specifies the authorization type for this server. Valid values: ▪ password: (default) Requires providing a password at login ▪ publickey: Public key authorization type
<privateKeyFile>	Specifies the location of the client private key file, required if using publickey authentication.
<privateKeyPassword>	Specifies the client private key password, required if using publickey authentication.

The following elements are supported for <server type=”server”> - This element is required and provides connection information to the EDD World APIs.

Element	Description
<host>	Specifies the host name or IP address for this server.
<username>	Specifies the user name for this server, if required.
<password>	Specifies the user password for this server, required if you choose password authentication.
<libList>	Specifies the library list to be used for EDD. This library list must contain the libraries, which contain the EDD transaction tables (F00E06, F00E061, F00E062, and F00E063), EDD Configuration table (F00E05), and the UDC table (F0005).
<updatePID>	Optional element, which specifies the value to be populated in the EDD transaction files when processed.

The following attributes are supported for <properties> element

Element	Description
<property name="ds-temp-dir">	Specifies the location of the temporary directory to be used by EDD. If not specified, the temp directory defaults to xdoRoot/temp, where xdoRoot is the EDD root directory specified in the F00E05 – EDD Configuration Parameters table. This directory must exist.
<property name="ds-buffering">	Specifies true or false for buffering mode.

The following is a sample of the xdoDelivery file:

```
<?xml version='1.0' encoding="UTF-8"?>
<config xmlns="http://xmlns.oracle.com/oxp/delivery/config">
<!--============================================================
  servers section
============================================================-->
 <servers>
  <server name="SMTP1" type="smtp_e-mail" default="true">
   <host>mail.mcycompany.com</host>
   <port>25</port>
   <username>username</username>
   <password>password</password>
  </server>
  <server name="SMTP2" type="smtp_e-mail" >
   <host>10.111.222.33</host>
   <port>25</port>
  </server>
  <server name="FTP1" type="FTP" default="true">
   <host>10.111.222.33</host>
   <port>21</port>
   <username>username</username>
   <password>password</password>
  </server>
  <server name="SFTP1" type="SFTP" default="true">
   <host>10.111.222.33</host>
   <port>22</port>
<username>username</username>
```

```
    <password>password</password>
    <authType>password</authType>
   </server>
<server name="SFTP2" type="SFTP" >
    <host>10.111.222.33</host>
    <port>22</port>
    <authType>publickey</authType>
    <username>username</username>
    <privateKeyFile>/World_EDD_JAVA/resource/id_rsa</privateKeyFile>
    <privateKeyPassword>keypassword</privateKeyPassword>
  </server>   <server name="myServer" type="system" default="true">
    <host> System iName </host>
    <username>username</username>
    <password>password</password>
    <libList>QTEMP JDFDTA91</libList>
    <updatePID>EDDPROCESS</updatePID>
  </server>
 </servers>
<!--============================================================
  properties section
=============================================================-->
 <properties>
  <property name="ds-temp-dir">/World_EDD_JAVA/temp</property>
  <property name="ds-buffering">true</property>
</properties>
</config>
```

Installing BI Publisher JAR files

If you are using BI Publisher APIs for report formatting and distribution, complete the following step. After purchasing BI Publisher (BIP), there are four .jar files included with BIP that need to be copied to the IFS for use with EDD. The first three .jar files are:

Note: The three files must be copied to the following directory IFS:

/World_EDD_JAVA/lib/BIP

- osdt_core.jar (*BIP_Install*\oc4j_bi\jlib)
- versioninfo.jar (*BIP_Install*\oc4j_bi\j2ee\home\applications\xmlpserver\xmlpserver\WEB-INF\lib)
- xdocore.jar (*BIP_Install*\oc4j_bi\j2ee\home\applications\xmlpserver\xmlpserver\WEB-INF\lib)

The fourth .jar file is:

- collections.jar (*BIP_Install*\oc4j_bi\j2ee\home\applications\xmlpserver\xmlpserver\WEB-INF\lib) must be copied to the /World_EDD_JAVA/lib directory in IFS.

Setting up UDCs for EDD

The following User Defined Codes (UDCs) are used by EDD. All user-defined UDCs must be set up to use the EDD enhancement.

- 00E/AS – System Server Alias – User Defined

  This UDC is used to maintain the valid values for the System Server defined in the xdodelivery.cfg file. The system server values are used to define a connection to the System i, where the EDD data and configuration files are stored. The system servers are defined in the xdodelivery.cfg file with the type parameter = “system”. *

- 00E/BE – Valid E-mail Body Extensions - Oracle Defined

  This UDC specifies the valid file extensions, which can be used for an e-mail body.

- 00E/BO – BIP Valid Output extensions - Oracle Defined

  This UDC specifies the valid file extensions that can be used for an output file created using the BI Publisher APIs.

- 00E/BT – BIP Valid Template Extensions - Oracle Defined

  This UDC specifies the valid file extensions that can be used for a BI Publisher template file.

- 00E/BY – Body Type - Oracle Defined

  This UDC specifies the valid values for a body type specified in an E-mail Template.

- 00E/ES – E-mail Server Alias - User Defined

  This UDC is used to maintain the valid values for the E-mail Server defined in the xdodelivery.cfg file. The e-mail server values are used to define a connection to the e-mail SMTP server. The e-mail servers are defined in the xdodeliver.cfg file with the type parameter = “smtp_e-mail”. *

- 00E/FS – FTP Server Alias

This UDC is used to maintain the valid values for the FTP Server defined in the xdodelivery.cfg file. The FTP server values are used to define a connection to the remote server used for FTP transfers. The FTP servers are defined in the xdodelivery.cfg file with the type parameter = “FTP”. *

- 00E / MT – Mime Types - Oracle Defined

  This UDC specifies the MIME types used within EDD. The UDC maps a file extension to a standard mime type. These mappings are used within the EDD JAVA programs to determine the mime type for a document based on the file extension.

- 00E / PC – Path Code - Oracle Defined

  This UDC specifies the possible values for the path code used in the F00E063 file.

- 00E / SS - SFTP Server Alias - User Defined

  This UDC is used to maintain the valid values for the SFTP Server defined in the xdodelivery.cfg file. The SFTP server values are used to define a connection to the remote server used for SFTP transfers. The SFTP servers are defined in the xdodelivery.cfg file with the type parameter = “SFTP”. *

- 00E / TT – Template Type - Oracle Defined

  This UDC specifies the valid template type that can be used when defining a transformation template.

- 00E / XO – XSL Valid Output Extensions - Oracle Defined

  This UDC defines the valid file extensions that can be used as the output file from an XSL transformation.

- FUTURE USE - 00E / XS – FAX Server Alias - User Defined

  This UDC is used to maintain the valid values for the FAX Server defined in the xdodelivery.cfg file. The FAX server values are used to define a connection to the server used to FAX documents. The FAX servers are defined in the xdodelivery.cfg file with the type parameter = “ipp_fax”. *

- 00E / XT – XSL Valid Template Extensions - Oracle Defined

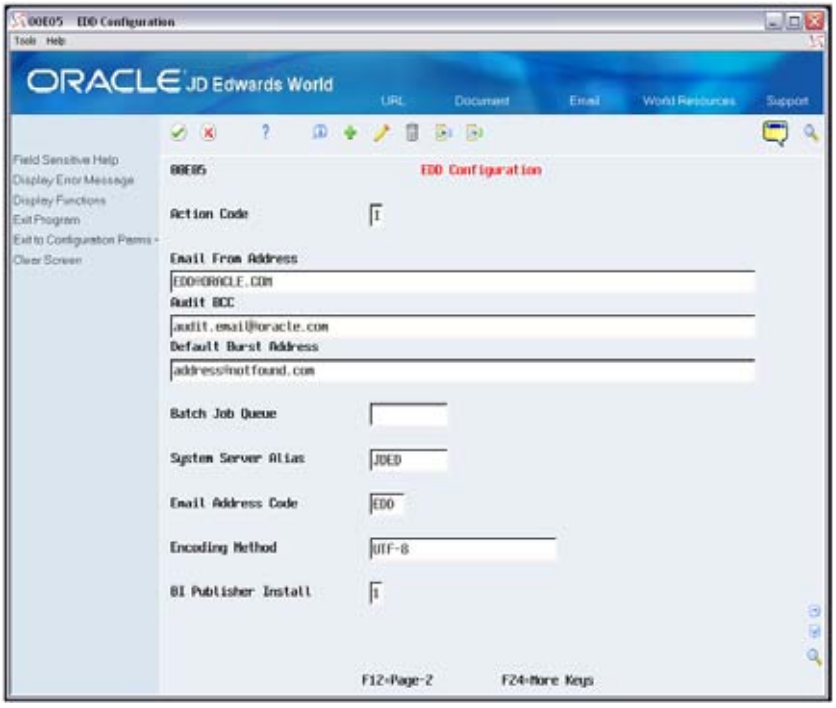
  This UDC defines the valid file extensions that can be used as the template file for an XSL transformation.

* See the section *Setting up xdodelivery.cfg configuration file* above for more information on setting up the xdodelivery.cfg file.

Setting up EDD Configuration Parameters

The EDD Configuration parameters are used to specify default values and setup information for the EDD system. The values are stored in the F00E05 – Configuration Master.

From Electronic Document Delivery Menu (G00E), choose Option 29 – Setup Operations
From Menu G00E41, choose select option 2 – EDD Configuration

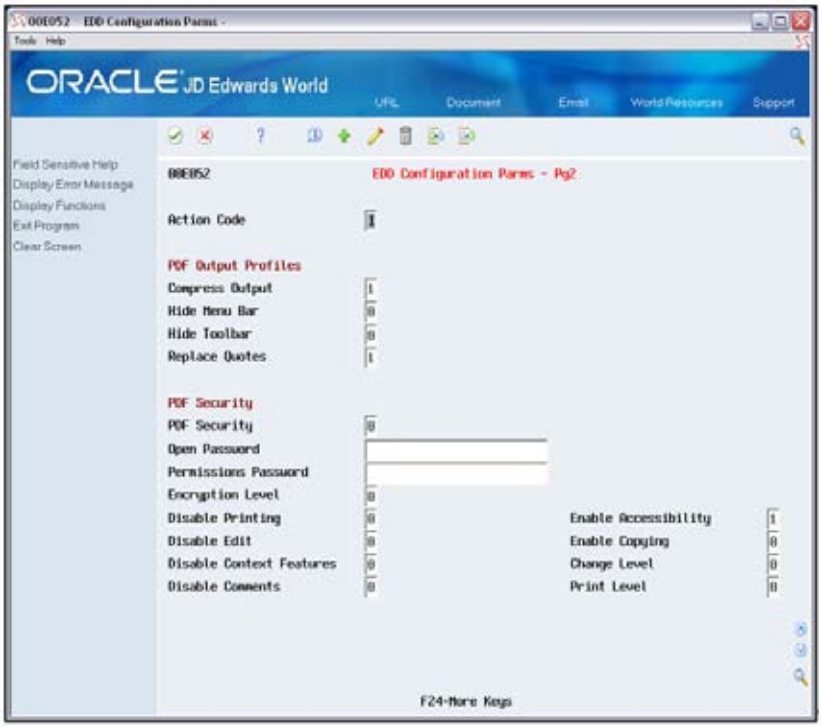


Field	Explanation
E-mail From Address	This is the default e-mail address used as the FROM address in EDD (in section *Sending an Ad hoc Email with EDD*, see *Note* on retrieving FROM address). This is a required value.
Audit BCC	This address, if specified, is appended to the list of BCC addresses for every e-mail sent out by EDD.
System Server Alias	This value specifies the name of the AS400, System i, or System i5 where the EDD files are stored.
E-mail Address Code	This is the UDC that specifies the code to use when retrieving the FROM address record from the F01018 (in section *Sending an Ad hoc Email with EDD*, see *Note* on retrieving FROM address).
Encoding Method	This is the encoding method used for e-mails id EDD, if blank, UTF-8 is used.
BI Publisher Install	This code indicates whether the BI Publisher APIs are installed and available for use in EDD.

Option Values – Function Keys	Explanation
F12- Page 2	This function key brings up the EDD Configuration – PG2, which specifies properties for PDF files created using EDD.

EDD Configuration Parameters – Page 2

The EDD Configuration Parameters – Page 2 screen allows input / update to the PDF Output and Security parameters used by EDD. When the BI Publisher APIs are used to create a PDF output document, these parameters are used to set properties within the document.



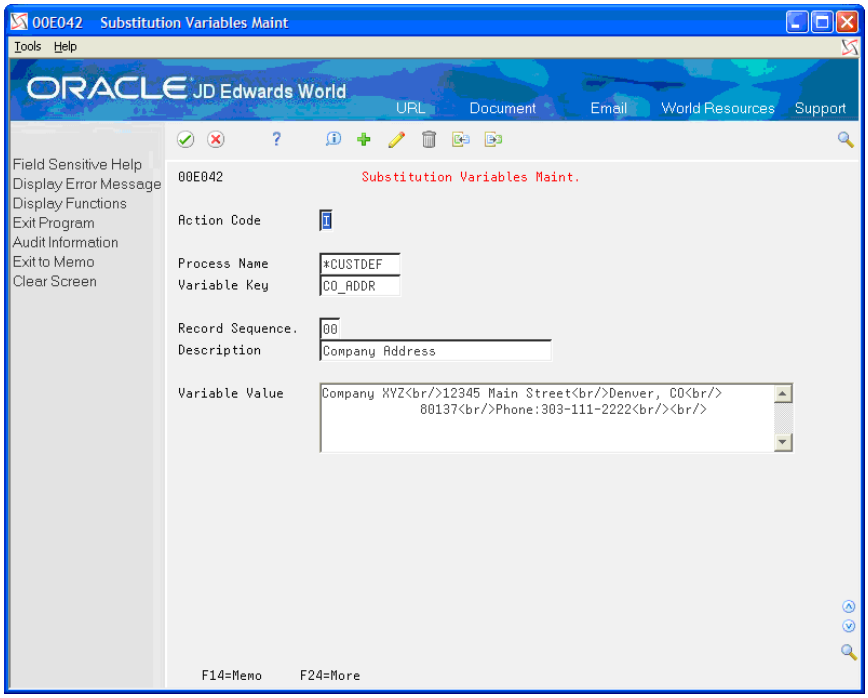
Field	Explanation
Compress Output	To control compression of the output PDF file, enter: 1 – True 0 – False
Hide Menu Bar	Enter 1 – True, to hide the viewer application's menu bar when the document is active.
Hide Toolbar	Enter 1 –True, to hide the viewer application's toolbar when the document is active.
Replace Quotes	Enter 0 – False, if you do not want curly quotes replaced with straight quotes in your PDF output.
PDF Security	Enter 1 - True, and the output PDF file is encrypted. You must also specify the following properties: ▪ Open document password ▪ Modify permissions password ▪ Encryption Level

Field	Explanation
Open Password	Password required to open the document. This property is enabled only when the Enable PDF Security is set to True.
Permissions Password	This password enables users to override the security setting. This property is effective only when Enable PDF Security is set to True.
Encryption Level	Specify the encryption level for the output PDF file. The possible values are: 0 - Low (40-bit RC4, Acrobat 3.0 or later) 1 - High (128-bit RC4, Acrobat 5.0 or later) This property is effective only when Enable PDF Security is set to True. When Encryption level is set to 0, you can also set the following properties: ▪ Disable printing ▪ Disable document modification ▪ Disable context copying, extraction, and accessibility ▪ Disable adding or changing comments and form fields When Encryption level is set to 1, the following properties are available: ▪ Enable text access for screen readers ▪ Enable copying of text, images, and other content ▪ Allowed change level ▪ Allowed printing level
Disable Printing	Permission available when Encryption level is set to 0. When set to True, printing is disabled for the PDF file.
Disable Edit	Permission available when Encryption level is set to 0. When set to True, the PDF file cannot be edited.
Disable Context Features	Permission available when Encryption level is set to 0. When set to True, the context copying, extraction, and accessibility features are disabled.
Disable Comments	Permission available when Encryption level is set to 0. When set to True, the ability to add or change comments and form fields is disabled.
Enable Accessibility	Permission available when Encryption level is set to 1. When set to True, text access for screen reader devices is enabled.
Enable Copying	Permission available when Encryption level is set to 1. When set to True, copying of text, images, and other content is enabled.

Field	Explanation
Change Level	Permission available when Encryption level is set to 1. Valid values: 0 – none 1 - Allows inserting, deleting, and rotating pages 2 - Allows filling in form fields and signing 3 - Allows commenting, filling in form fields, and signing 4 - Allows all changes except extracting pages
Print Level	Permission available when Encryption level is set to 1. Valid values: 0 – None 1 - Low resolution (150 dpi) 2 - High resolution

Setting up EDD Substitution Variables

EDD Substitution Variables are used within an E-mail Template. A variable can be inserted into the e-mail template and is replaced at run time with the variable value. For example, a substitution variable CO_ADDR can be defined as shown in the following graphic:



The variable &CO_ADDR can then be used in multiple templates to ensure the company name and address has a consistent appearance across all e-mails. In the generated e-mail, the substitution value above displays as:

Company XYZ

12345 Main Street

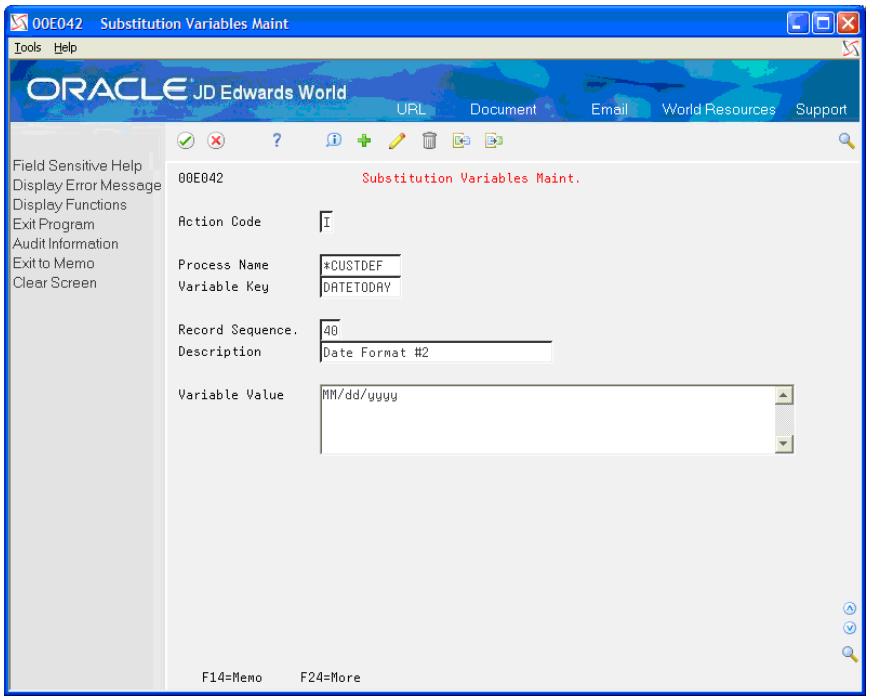
Denver, CO

80137

Phone:303-111-2222

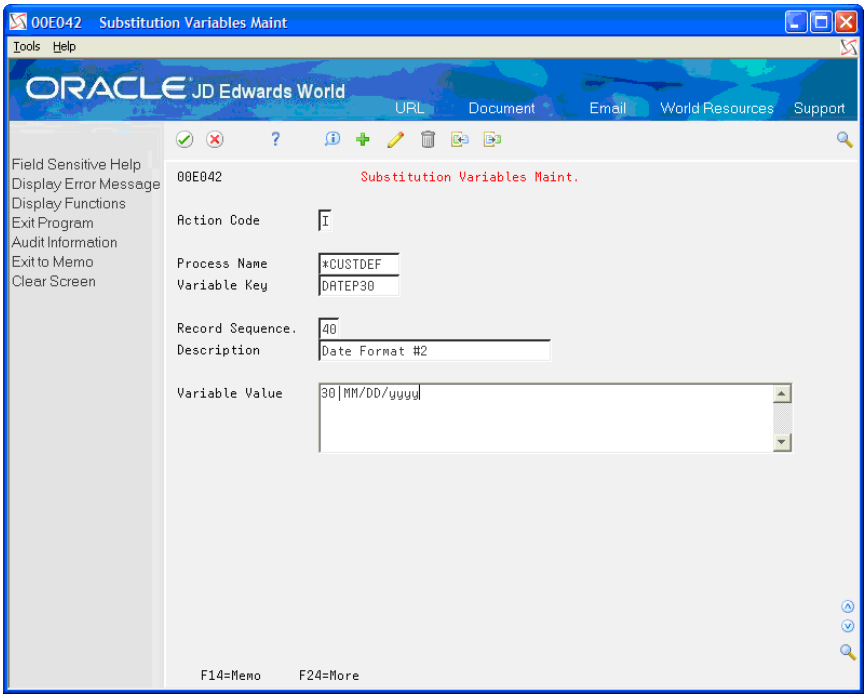
If the company address or phone number changes in the future, the user only updates the substitution value and does not have to make any modifications to the templates, which use the substitution variable.

Another use for EDD Substitution Variables is to display dates within an e-mail. A substitution variable DATETODAY can be defined as shown in the following graphic:



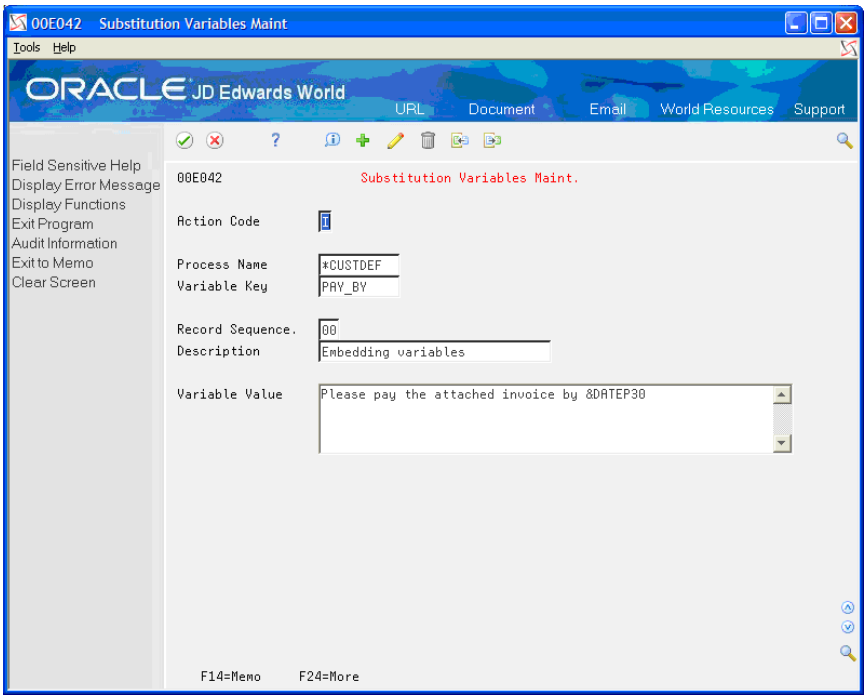
The variable &DATETODAY can then be used in e-mail templates and the generated e-mail displays the current date in the MM/DD/YYYY format such as 12/01/2008. Date substitutions can also be used to display a past or future date by specifying a number of days to add or subtract from the current date.

For example, the substitution value defined as:



The example above displays the date 30 days after today's date in MM/DD/YYYY format.

The Record Sequence field is used to determine the order in which substitution variables are converted. This is used when substitution variables are embedded within each other. The following is an example in the setup:



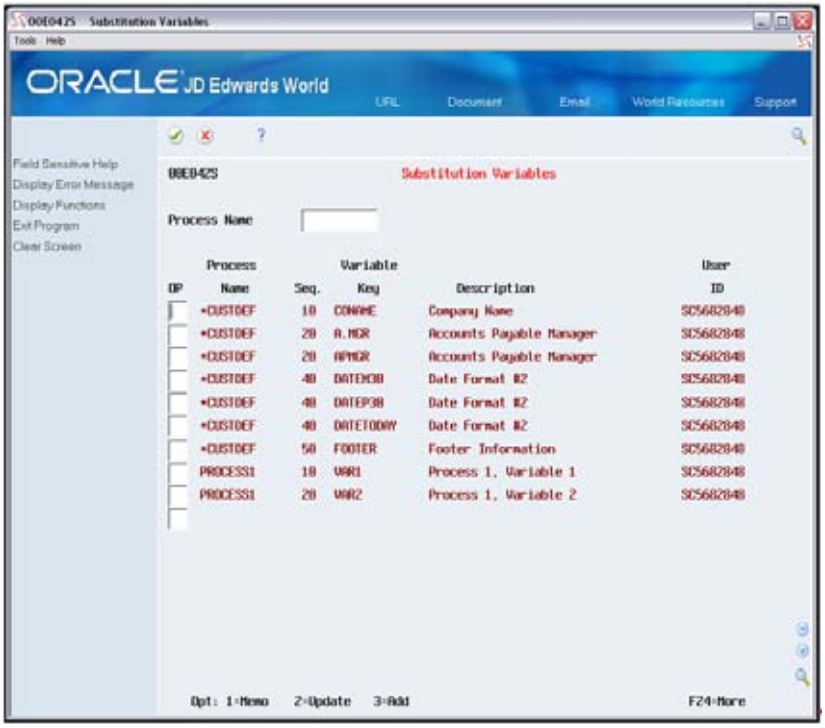
The substitution variable DATEP30 is embedded in the variable PAY_BY. The

Variable DATEP30 must have a Record Sequence greater than the Record Sequence of PAY_BY, for the embedded variable to be correctly converted.

Substitution Variables Selection

The Substitution Variables Selection displays a listing of existing variables and provides exits to allow adding and updating the substitution variables.

	From Electronic Document Delivery Menu (G00E), choose Option 29 – Setup Operations From Menu G00E41, choose option 3 – Substitution Variables



Field	Explanation
Process Name	This field allows the input of a process name, or partial name, to position the list of values to a selected value.

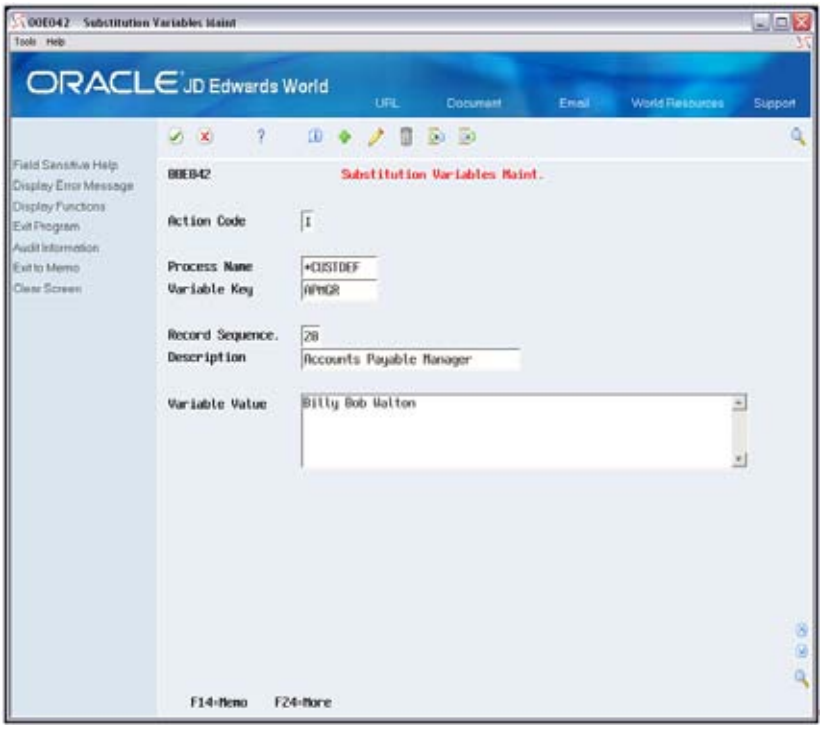
Option Values – Function Keys	Explanation
1- Memo	Option 1 exits to the Generic Text and allows the user to add / update generic text for the substitution variable.
2- Update	Option 2 exits to the P00E042- Substitution Variable Maint. Screen and allows updates to the selected substitution variable.

Option Values – Function Keys	Explanation
3- Add	ADD - Option 3 on a blank line exits to the Substitution Variables Maintenance screen and allows the user to enter in a new variable.

Substitution Variables Maintenance

From Electronic Document Delivery Menu (G00E), choose Option 29 – Setup Operations
From Menu G00E41, choose option 3 – Substitution Variables
Enter a 2 on a detail line to access the Maintenance screen

The Substitution Variables Maintenance provides the ability to update and delete an existing substitution value or add a new value.



Field	Explanation
Action Code	Action type- allows user to (I) Inquire, (A) Add, (C) Change, or (D) Delete the current record.
Process Name	The process name is used to organize several variables into groups. The *CUSTDEF value is a system-defined value used to create global variables. These substitution variables can be used in any e-mail template and in the E-mail Client text.

Field	Explanation
Variable Key	The key name for this variable. This uniquely identifies a substitution variable. If the variable key begins with DATE the variable is treated as a date field and is formatted using the value in Variable Value (see below).
Record Sequence	The record sequence is used to control the order in which the substitution variables are processes. For example, if there are two Substitution Variables: ▪ TITLE=”Today’s date is &DATETODAY” ▪ DATETODAY = “yyyy.MM.dd 'at' HH:mm:ss” The record sequence for DATETODAY needs to be greater than the record sequence for TITLE, so the TITLE substitution processes first and then the DATETODAY substitution.
Description	Description of the value.
Variable Value	This is the value to be substituted when the variable key is found in a template. When the variable key begins with DATE, a date substitution is performed and this value determines the format of the date field. The format is in the form of: xxx|format Where: xxx - is an optional integer that specifies an offset for the date field. The offset can be a positive value (30| - specifies 30 days from the current date) or negative (-30| - specifies 30 days prior to the current date). | - separator character-omit if not offset provided. format – format for date value, this string uses the Java Simple Date Format to specify the formatting parameters for the field. For example: ▪ Variable key = yyyy.MM.dd 'at' HH:mm z displays the current date in the format 2008.12.01 at 10:00:00 AM ▪ Variable key = -30|yyyy.MM.dd 'at' HH:mm z displays the date 30 days prior to the current date in the format 2008.11.01 at 10:00:00 AM (See *http://java.sun.com/j2se/1.4.2/docs/api/java/text/SimpleDateFormat.html* for more details)

Option Values – Function Keys	Explanation
F14- Memo	F14 exits to the Generic Text and allows the user to add / update generic text for the substitution variable.

Working with E-mail Lists

E-mail Lists are used to maintain a group of e-mail addresses. The E-mail List does not contain the actual e-mail address, instead it contains a pointer back to the selected record in the F01018- Address Book - E-mail / URL Addresses table.

When an e-mail address is changed in the F01018 table, the new value is reflected in all E-mail Lists where the address appears. E-mail lists can be used in Distribution Profiles to deliver an e-mail to all members of the list. E-mail Lists can also contain other E-mail Lists. For example several managers can have E-mail Lists containing the e-mail addresses of their employees, a director can create an E-mail List, which includes all of his manager's lists.

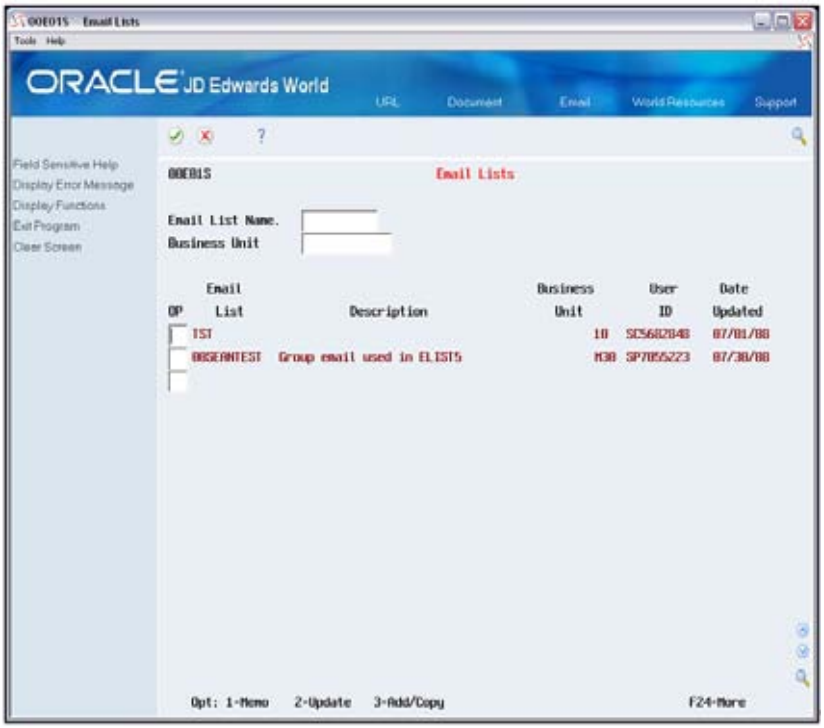
This section contains information about the various screens associated with creating and maintaining E-mail Lists and includes the following screens:

- E-mail List Selection
- E-mail List Maintenance
- EDD E-mail Selection
- EDD E-mail Lists Selection

E-mail List Selection

The E-mail List Selection is the entry point for reviewing, adding, and updating E-mail Lists. The screen displays a list of existing E-mail Lists and provides exits to allow adding, copying, and updating the E-mail Lists.

From Electronic Document Delivery Menu (G00E), choose Option 2



Field	Explanation
E-mail List Name	This is a position-to value used to position the subfile to start at a specified value.
Business Unit	This field is a filter field used to filter subfile records by Business Unit.
Subfile	
Option	Option value – (see *Option Values* below) If the option field is highlighted, this indicates that Generic Text exists for the record.
E-mail List	The Name of the E-mail List.
Description	A short description of this E-mail List.
Business Unit	The Business Unit for this E-mail List.
User ID	The User ID of the last user who updated the E-mail List.
Date Updated	The Date of the last update to the E-mail List.

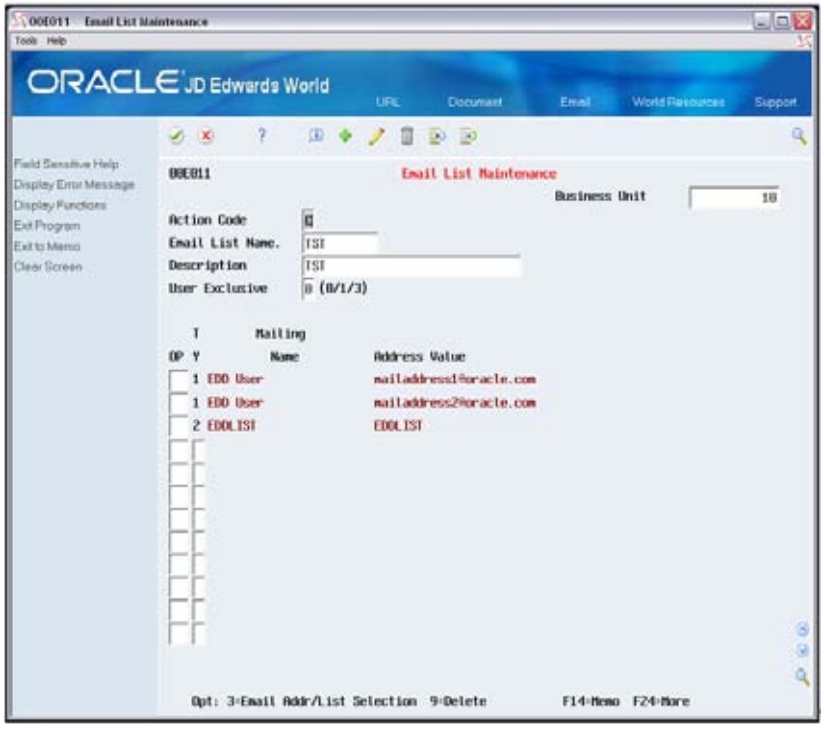
Option Values – Function Keys	Explanation
1- Generic Text Memo	Option 1 exits to the Generic Text and allows the user to add / update generic text for the E-mail List.

Option Values – Function Keys	Explanation
2- Update	Option 2 exits to the P00E011- E-mail Lists Maintenance screen and allows updates to the selected E-mail List (see *E-mail List Maintenance* below).
3- Add/Copy	ADD - Option 3 on a blank line exits to the E-mail Lists Maintenance screen and allows the user to enter in a new list. COPY - Option 3 on an existing record, prompts the user to enter a new E-mail List Name and creates a new E-mail List using this new name and the detail from the selected record. The new list displays in the E-mail Lists Maintenance screen in inquiry mode.

E-mail Lists Maintenance

From Electronic Document Delivery Menu (G00E), choose Option 2
Choose option 2 or 3 on a detail line to exit to the Maintenance screen.

The E-mail Lists Maintenance provides the ability to update and delete an existing E-mail List or add a new list. To add E-mail Lists or e-mail addresses to an exiting list, the user must select the new values using the search programs. Ad hoc entries of e-mail addresses are not allowed.



Field	Explanation
Action Code	Action type- allows user to (I) Inquire, (A) Add, (C) Change, or (D) Delete the current record.
Business Unit	The business unit associated with this list.
E-mail List Name	The name of the E-mail List
Description	A short description of the E-mail List.
User Exclusive	This value sets the security level for the E-mail List. Valid values: 0 - No security - Anyone can modify, copy, use, or delete the item. This is the default when adding an item. 1 - Medium security - Only the current owner (USER ID) can modify or delete the item. Anyone can use or copy the item. 3 - Full security – Only the current owner (USER ID) can modify, copy, use, or delete the item.
Subfile	
Option	Option value – (see *Option Values* below) If the option field is highlighted, this indicates that Generic Text exists for the record.
E-mail Type	The Name of the E-mail List.
Mailing Name	A display only field of the mailing name. For e-mail addresses (type-1) this value is retrieved based on the Address Book Number selected from the F01018. It is either the Who's Who mailing name, if a Who's Who line number exists, or the Address Book Name if no Who's Who line exists. For E-mail Lists this is just the E-mail List name.
Address value	For e-mail address, this is the E-mail address retrieved from the F01018. For e-mail Lists, this is the E-mail List name.

Option Values – Function Keys	Explanation
3 – E-mail Addr / List Selection Note: Option available only on a blank line.	Option 3 – on a blank line exits to the EDD E-mail Selection or EDD E-mail Lists Selection based on the E-mail Type. The user can select one or several e-mail addresses / list and the selected values are populated in the current E-mail List.
9- Delete	Option 9 deletes the selected record.

Option Values – Function Keys	Explanation
F14-Memo	Function 14 exits to the Generic Text screen to allow the user to enter / update generic text for the E-mail List.

EDD E-mail Selection

The EDD E-mail Selection is called from the E-mail Lists Maintenance screen and provides the ability to select one or more e-mail addresses from the F01018 – Address Book E-mail / URL Addresses file, to be included in the current list.

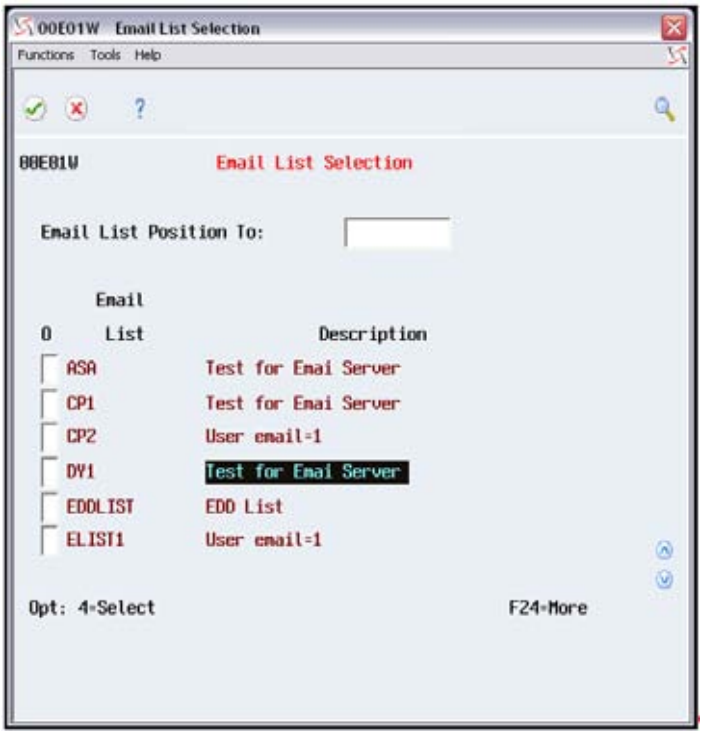
Field	Explanation
Address Number	Filter field to select F01018 records for a specific Address Book number.
Who's Who Line	Filter field to select F01018 records for a specific Who's Who line number.
E-mail / URL Type	Hard-coded to 1 to select e-mail addresses.
E-mail / URL Category Code	Filter field to select F01018 records for a specific Category Code.
Subfile	
Option	Option value – see *Option Values* below.

Field	Explanation
Mailing Name	Mailing Name retrieved from Address Book or Who's Who, based on Address Book and Who's Who line number.
E-mail / URL Address Cat Code	UDC value and description from F01018.
Description	Description from F01018.

Option Values – Function Keys	Explanation
4 –Select	Option 4 – selects one or more records and returns the records to the calling program.

EDD E-mail Lists Selection

The EDD E-mail Lists Selection is called from the E-mail Lists Maintenance screen and provides the ability to select one or more E-mail Lists from the F00E01 – E-mail List Master, to be included in the current list.



Field	Explanation
E-mail List Position To: :	Position to field to allow the positioning of records in the subfile to start at a selected value.

Field	Explanation
Subfile	
Option	Option value – see *Option Values* below.
E-mail List	E-mail List name.
Description	E-mail List Description.

Option Values – Function Keys	Explanation
4 –Select	Option 4 – selects one or more records, and returns the records to the calling program.

Working with Distribution Profiles

Distribution Profiles are used to define how a selected report is distributed and determines to whom the e-mail is sent for e-mail deliveries. Distribution Profiles can select a method for distribution such as e-mail, FTP, or SFTP and also specifies the server to be used to process the distribution. If the e-mail option is used for a distribution profile, you can also select the e-mail addresses or E-mail Lists to be used for the distribution and where the e-mail address or list appears on the generated e-mail (TO, CC, or BCC address). Distribution Profiles can be specified in the E-mail Client or on the Import Export screens to associate a profile with the selected report or e-mail.

This section contains information about the various screens associated with creating and maintaining Distribution Profiles and includes the following screens:

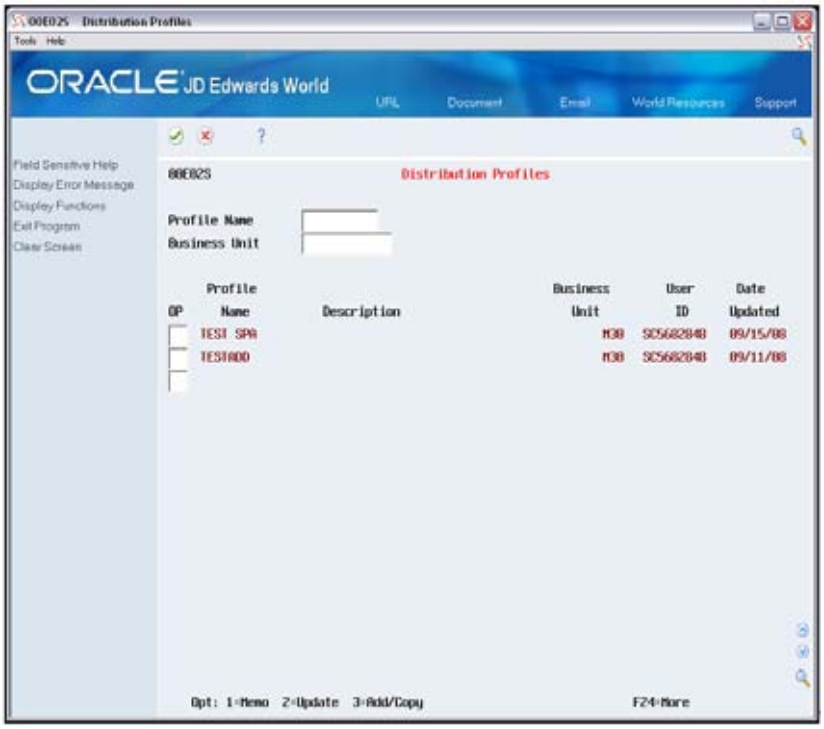
- Distribution Profile Selection
- Distribution Profile Maintenance
- Distribution Profile Detail

Distribution Profile Selection

The Distribution Profile Selection is the entry point for reviewing, adding, and updating Distribution Profiles.

The screen displays a listing of existing Distribution Profiles and provides exits to allow adding, copying, and updating a selected profile.

From Electronic Document Delivery Menu (G00E), choose option 3 – Distribution profiles



Field	Explanation
Profile Name	This is a position to value used to position the subfile to start at a specified value.
Business Unit	This field is a filter field used to filter subfile records by Business Unit.
Subfile	
Option	Option value – (see *Option Values* below). If the option field is highlighted, this indicates that Generic Text exists for the record.
Profile Name	The name of the Distribution Profile.
5 Description	A short description of this profile.
Business Unit	The Business Unit for this profile.
User ID	The User ID of the last user who updated the profile.
Date Updated	The Date of the last update to the profile.

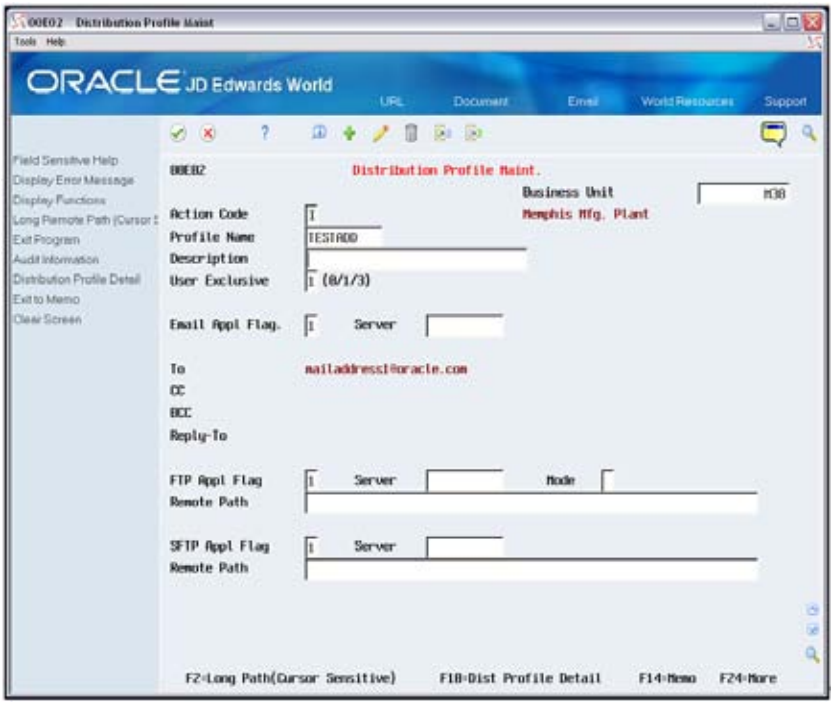
Option Values – Function Keys	Explanation
1- Memo	Option 1 exits to the Generic Text and allows the user to add / update generic text for the Distribution Profile.

Option Values – Function Keys	Explanation
2- Update	Option 2 exits to the P00E02- Distribution Profile Maintenance screen to allow updates to the selected Distribution Profile (see *Distribution Profile Maintenance* below).
3- Add/Copy	ADD - Option 3 on a blank line exits to the Distribution Profile Maintenance screen and allows the user to enter in a new profile. COPY - Option 3 on an existing record prompts the user to enter a new Distribution Profile Name and create a new Distribution Profile using this new name and the detail from the selected record. The new profile displays in the Distribution Profile Maintenance screen in inquiry mode.

Distribution Profile Maintenance

From Electronic Document Delivery Menu (G00E), choose option 3 – Distribution Profile
Enter a 2 or 3 in the option field on a detail line to exit to the Maintenance screen

The Distribution Profile Maintenance provides the ability to update and delete an existing Distribution Profile or add a new profile.

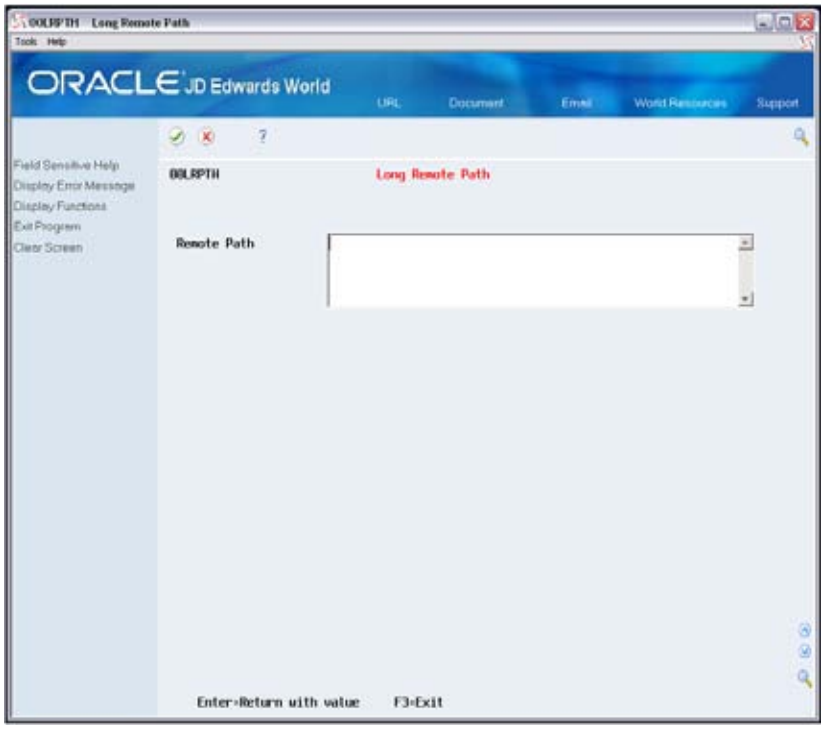


Field	Explanation
Action Code	Action type- allows user to (I) Inquire, (A) Add, (C) Change, or (D) Delete the current record.
Business Unit	The business unit associated with this profile.
Profile Name	The name of the Distribution Profile.
Description	A short description of the Distribution Profile.
User Exclusive	This value sets the security level for the Distribution Profile. Valid values: 0 - No security - Anyone can modify, copy, use, or delete the item. This is the default when adding an item. 1 - Medium security - Only the current owner (USER ID) can modify or delete the item. Anyone can use or copy the item. 3 - Full security – Only the current owner(USER ID) can modify copy, use, or delete the item.
E-mail Appl Flag	Flag to indicate if e-mail distribution is enabled for this profile, if so, which APIs to use for processing. Valid values: ‘ ‘ – disabled , e-mail is not processed for this profile. ‘1’ – enabled using World APIs. E-mail is processed using World APIs for this profile. ‘2’ - enabled using BI Publisher APIs.
Server	This is the identifier used to retrieve server configuration information from the xdodelivery.cfg file (see *Setting up xdodelivery.cfg configuration file*). If the server name is blank, the default server for server type = “smtp_e-mail” is used.
To	This value is read only and retrieved from the F00E021 – Distribution Profile Detail file, where the delivery type = ‘3’. If multiple records exist in the Distribution Profile Detail File, this field displays a message to review the values in the Distribution Profile Detail application.
CC	This value is read only and retrieved from the F00E021 – Distribution Profile Detail file, where the delivery type = ‘4’. If multiple records exist in the Distribution Profile Detail File, this field displays a message to review the values in the Distribution Profile Detail application.

Field	Explanation
BCC	This value is read only and retrieved from the F00E021 – Distribution Profile Detail file, where the delivery type = '5'. If multiple records exist in the Distribution Profile Detail File, this field displays a message to review the values in the Distribution Profile Detail application.
Reply-To	This value is read only and retrieved from the F00E021 – Distribution Profile Detail file, where the delivery type = '2'. If no value is found in the F00E021 for delivery type ='2', this value is retrieved from the F00E05 – EDD Configuration Master (see *Setting up EDD Configuration Parameters*).
FTP Appl Flag	Flag to indicate if FTP distribution is enabled for this profile, and if so, which APIs to use for processing. Valid values: ' ' – disabled, FTP is not processed for this profile. '1' – enabled using World APIs. FTP is processed using World APIs for this profile. '2' – enabled using BI Publisher APIs FTP is processed using World APIs for this profile.
Server	This is the identifier used to retrieve server configuration information from the xdodelivery.cfg file (see *Setting up xdodelivery.cfg configuration file*). If the server name is blank, the default server for server type = "FTP" is used.
Mode	FTP transfer Mode. Valid values: ' ' – ASCII (default) '1' – Binary
Remote Path	FTP remote path. This is the path on the remote server where the distributed document is placed. The F2 –Long Path function key exits to the EDD Long Remote Path screen to allow entries up to 255 characters in length.
SFTP Appl Flag Note: SFTP is currently only available using BI Publisher APIs. If you select an application flag of 1 for SFTP Appl Flag, the system generates an unsupported function error.	Flag to indicate if SFTP distribution is enabled for this profile, if so, which APIs to use for processing. Valid values: ' ' – disabled , SFTP is not processed for this profile. '2' – enabled using BI Publisher APIs.

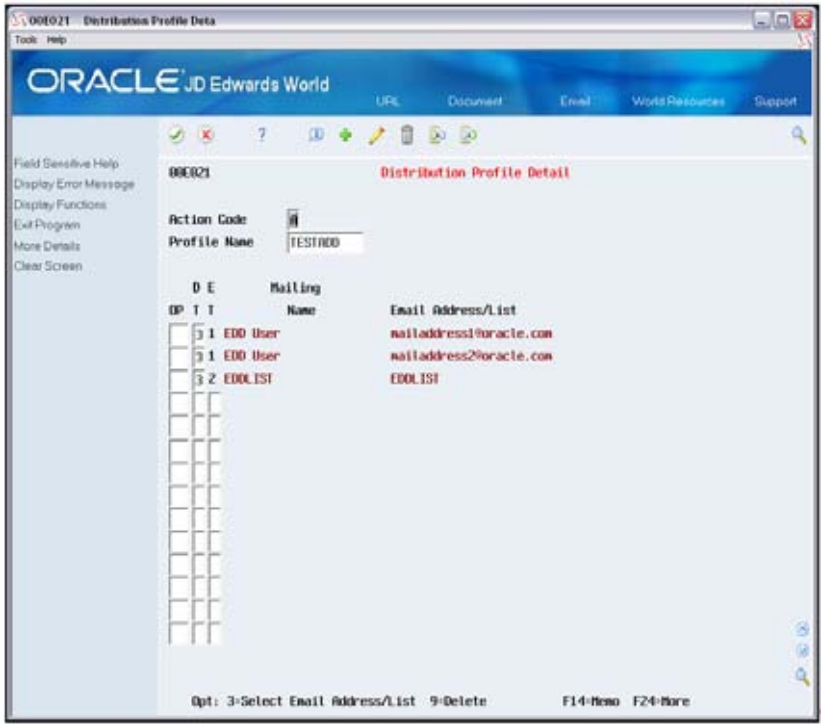
Field	Explanation
Server	This is the identifier used to retrieve server configuration information from the xdodelivery.cfg file (see *Setting up xdodelivery.cfg configuration file*). If the server name is blank, the default server for server type = SFTP is used.
Remote Path	SFTP remote path. This is the path on the remote server where the distributed document is placed. The F2 –Long Path function key exits to the EDD Long Remote Path screen to allow entries up to 255 characters in length.

Option Values – Function Keys	Explanation
F2 – Long Path	Cursor sensitive function key allows entry of long names for FTP and SFTP Remote Paths. If the length of the value entered is greater than the field size on the Distribution Profile Maintenance screen, the value is protected on the maintenance screen and must be edited from the Long Remote Path screen.
F10- Distribution Profile Detail	F10 – exits to P00E021 – Distribution Profile Detail to allow entry of e-mail addresses and E-mail Lists for various delivery types.
F14- Memo	F14 - exits to the Generic Text screen to allow the user to enter / update generic text for the Distribution Profile.



Distribution Profile Detail

The Distribution Profile Detail provides the ability to add, update, and delete e-mail delivery information for a Distribution Profile. The user can select one or more e-mail addresses or E-mail Lists to be used for the delivery of the document. For each address or list the user can specify a delivery type for the e-mail (TO, CC, BCC).



Field	Explanation
Action Code	Action type- allows user to (I) Inquire, (A) Add, (C) Change, or (D) Delete the current record.
Profile Name	The name of the Distribution Profile.
Subfile	
Option	Option value – (see *Option Values* below). If the option field is highlighted, this indicates that Generic Text exists for the record.

Field	Explanation
Delivery Type	Value specifies the delivery type for the record. This value determines which address section the value is paced. Valid values: 1 - From address this is a system controlled value. 2 - Reply address – a maximum of one type 2 entries is allowed. If no type 2 records are entered, the From address defaults from the F00E05 – EDD Configuration Master. 3 - To address – screen might contain several type 3 addresses and / or lists. 4 - CC address – screen might contain several type 4 addresses and / or lists. 5 - BCC address – screen might contain several type 5 addresses and / or lists.
E-mail Type	Specifies the e-mail type for this record. Valid values: 1 - E-mail Address 2 – E-mail List
Mailing Name	Mailing Name retrieved from Address Book or Who's Who, based on Address Book and Who's Who line number.
Address Value	For e-mail address, this is the e-mail address retrieved from the F01018. For e-mail Lists, this is the E-mail List name.

Option Values – Function Keys	Explanation
3 – E-mail Addr / List Selection Note: Option available only on a blank line.	Option 3 – on a blank line exits to the EDD E-mail Selection or EDD E-mail Lists Selection based on the E-mail Type. The user can select one or several e-mail addresses / lists and the selected values are populated in the current distribution profile.
9- Delete	Option 9 deletes the selected record.

Working with E-mail Templates

E-mail Templates are used to define the subject line and body of an e-mail generated using EDD. The body of the e-mail can be stored as part of the template using

Generic Text or the template can point to an external text or html file to be used as the e-mail body. An E-mail Template can then be specified on the E-mail Client or within the Import Export parameters to define the body of a generated e-mail.

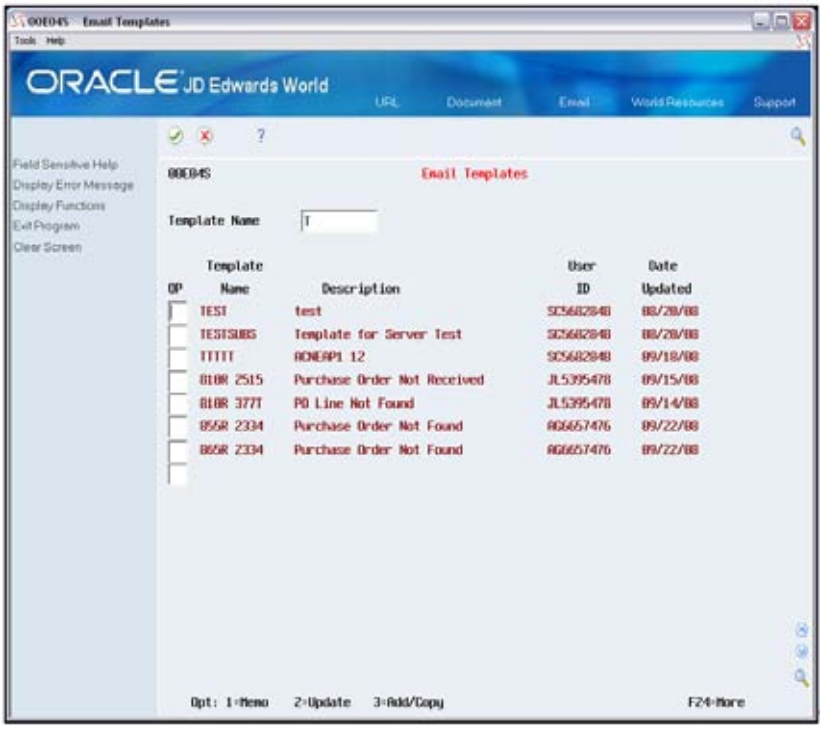
This section contains information about the various screens associated with creating and maintaining E-mail Templates and includes the following screens:

- E-mail Template Selection
- E-mail Template Maintenance

E-mail Template Selection

The E-mail Template Selection is the entry point for reviewing, adding, and updating E-mail Templates. The screen displays a listing of existing E-mail Templates and provides exits to allow adding, copying, and updating the E-mail Templates.

	From Electronic Document Delivery Menu (G00E), choose option 4- E-mail Templates



Field	Explanation
Template Name	This is a 'position to' value used to position the subfile to start at a specified value.

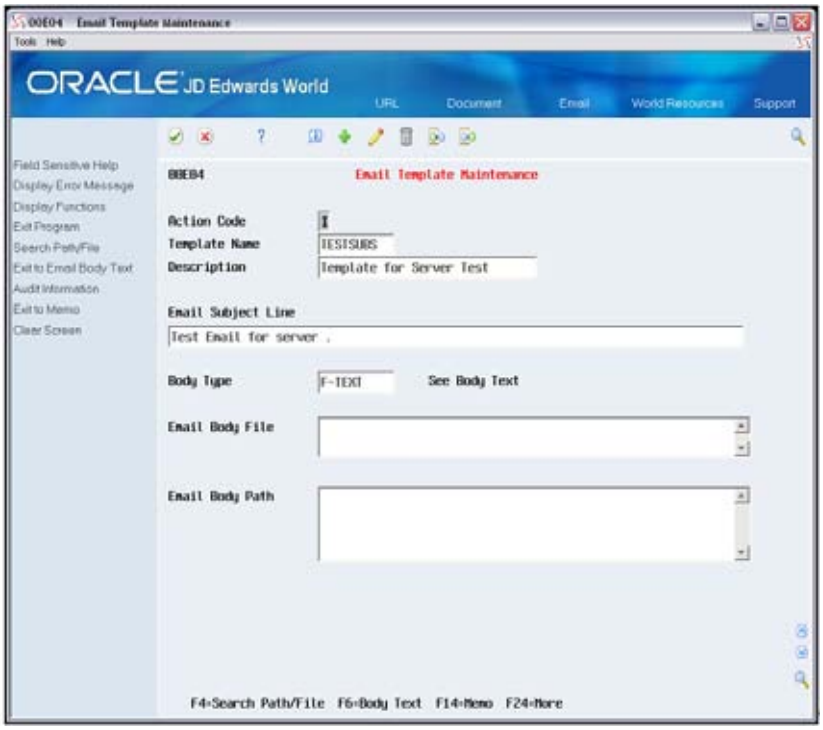
Field	Explanation
Subfile	
Option	Option value – (see *Option Values* below) If the option field is highlighted, this indicates that Generic Text exists for the record.
Template Name	The Name of the E-mail Template.
Description	A short description of this E-mail Template.
User ID	The User ID of the last user who updated the E-mail Template.
Date Updated	The Date of the last update to the E-mail Template.

Option Values – Function Keys	Explanation
1- Generic Text Memo	Option 1 exits to the Generic Text entry screen and allows the user to add/update generic text for the e-mail template.
2- Update	Option 2 exits to the P00E04- E-mail Template Maintenance screen to allow updates to the selected E-mail List (see *E-mail Template Maintenance* below).
3- Add/Copy	ADD - Option 3 on a blank line exits to the E-mail Template Maintenance screen and allows the user to enter in a new template. COPY - Option 3 on an existing record, prompts the user to enter a new E-mail Template Name and creates a new E-mail Template using this new name and the detail from the selected record. The new template displays in the E-mail Template Maintenance screen in inquiry mode.

E-mail Template Maintenance

From Electronic Document Delivery Menu (G00E), choose option 4- E-mail Templates
Enter a 2 or 3 on a detail line to exit to the Maintenance screen

The E-mail Template Maintenance provides the ability to update and delete an existing E-mail Template or add a new template.



Field	Explanation
Action Code	Action type- allows user to (I) Inquire, (A) Add, (C) Change, or (D) Delete the current record.
Template Name	The name of the E-mail Template.
Description	A short description of the E-mail Template.
E-mail Subject Line	This is the text that appears in the subject line of the e-mail.
Body Type	Identifies the body type of the e-mail. Valid values are stored in the 00E/BY UDC. Valid values: TEXT - Text displayed in the body of the mail as it is entered, no substitutions or line breaks are inserted. F-TEXT – Text file that allows users to specify line breaks. The user can enter a tag to specify where line breaks are to be placed. Substitution Variables can be used and the values are replaced with text passed to the e-mail program at run time. HTML – The user can format e-mail body using HTML tags. No Substitution Variables are inserted. F-HTML – User can format e-mail body using HTML tags. Substitution Variables can be used and the values are replaced with values passed to the e-mail program at run time.

Field	Explanation
E-mail Body File	Name of the file to be used as the body of the e-mail. This file can be of type .txt or .html.
E-mail Body Path	Directory where Body File is located. Note: You can specify an E-mail Body File&Path or enter generic text to be used as the body of the e-mail, you can not specify both.

Option Values – Function Keys	Explanation
F4 – Search Path File	F4 - displays the 00DIRS – IFS Directory Search window in order for the user to select an existing file to be used as the e-mail body.
F6 – Body Text	F6 - exits to the Generic text entry screen and allows the user to enter text used as the e-mail body.
F14-Memo	F14 - exits to the Generic Text screen to allow the user to enter / update generic text for the E-mail Template.

Working with Transformation Templates

The Transformation Template in EDD allows the user to translate the XML output from Import / Export using an XSL or BI Publisher template. An XSL template is used to transform an XML document from one form to another. A BI Publisher template is used with XML input data to create an output report in various formats. The template file specified in the Transformation Template is created by the user and must exist before populating the name in the Transformation Template.

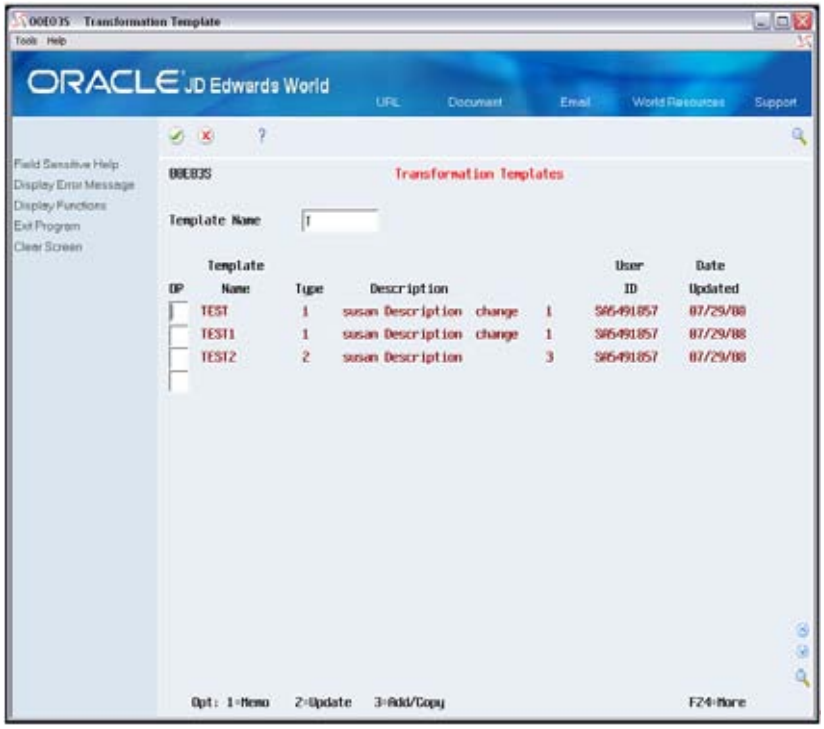
This section contains information about the various screens associated with creating and maintaining Transformation Templates and includes the following screens:

- Transformation Template Selection
- Transformation Template Maintenance

Transformation Template Selection

The Transformation Templates Selection is the entry point for reviewing, adding, and updating Transformation Templates. The screen displays a listing of existing Transformation Templates and provides exits to allow adding, copying, and updating the Transformation Templates.

From Electronic Document Delivery Menu (G00E), choose option 5- Transformation Template



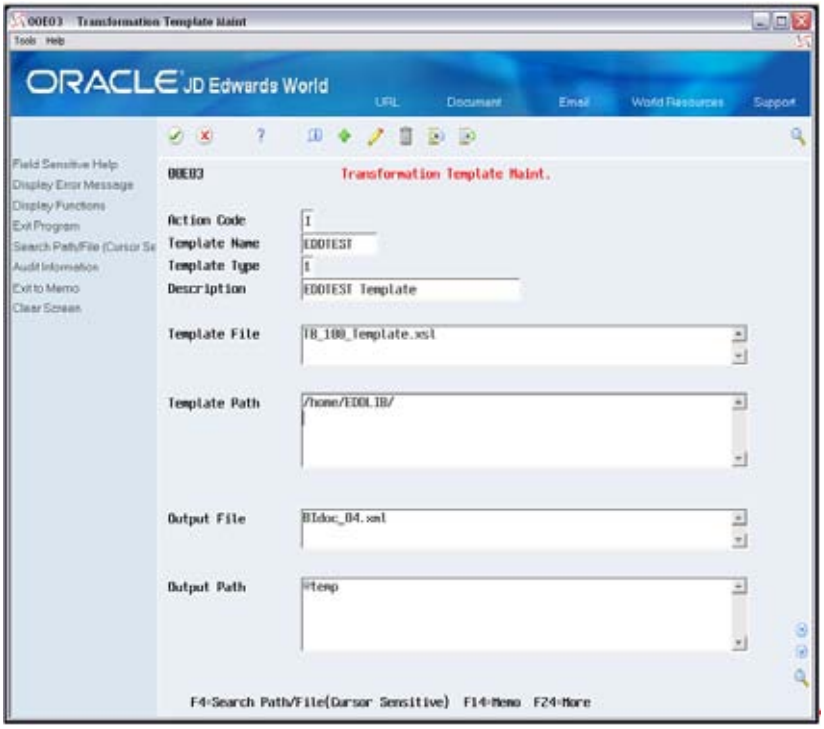
Field	Explanation
Template Name	This is a position to value used to position the subfile to start at a specified value.
Subfile	
Option	Option value – (see Option *Values below*) If the option field is highlighted, this indicates that Generic Text exists for the record.
Template Name	The Name of the Transformation Template.
Type	Value specifies the type of transformation related to this record. Valid values: 1 - XSL Template 2 - BI Publisher Template
Description	A short description of this Transformation Template.
User ID	The User ID of the last user who updated the Transformation Template.
Date Updated	The Date of the last update to the Transformation Template.

Option Values – Function Keys	Explanation
1- Memo	Option 1 exits to the Generic Text entry screen and allows the user to add/update generic text for the Transformation Template.
2- Update	Option 2 exits to the P00E03- Transformation Template Maintenance screen to allow updates to the selected Transformation Template (see *Transformation Template Maintenance* below).
3- Add/Copy	ADD - Option 3 on a blank line exits to the Transformation Template Maintenance screen and allows the user to enter in a new template. COPY - Option 3 on an existing record prompts the user to enter a new Transformation Template Name and creates a new Transformation Template using this new name and the detail from the selected record. The new template displays in the Transformation Template Maintenance screen in inquiry mode.

Transformation Template Maintenance

The Transformation Template Maintenance provides the ability to update and delete an existing TransformationTemplate or add a new template.

From Electronic Document Delivery Menu (G00E), choose option 5- Transformation Template
Enter a 2 or 3 in the option field on a detail line to exit to the Maintenance screen



Field	Explanation
Action Code	Action type- allows user to (I) Inquire, (A) Add, (C) Change, or (D) Delete the current record.
Template Name	The name of the Transformation Template.
Template Type	The template type for this transformation. Valid values: 1 - XSL Template 2 - BI Publisher Template
Description	A short description of the Transformation Template.
Template File	The name of the Template File. This file must exist and the file extension is validated based on the template type. UDCs used for validation: Template Type = 1 – UDC 00E/XT Template Type = 2 – UDC 00E/BT
Template Path	The path where the Template File is located. *Screen-specific information* You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read/write authority to the directory.

Field	Explanation
Output File	This is the name of the Output File created by the transformation. The file extension is validated based on the template type. UDCs used for validation: Template Type = 1 – UDC 00E/XO Template Type = 2 – UDC 00E/BO
Output Path	The path where the Output File is located. *Screen-specific information* You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read/write authority to the directory.

Option Values – Function Keys	Explanation
F4- Search Path/File	F4 - is a cursor sensitive function key that brings up the 00DIRS – IFS Directory Search window in order for the user to select an XSL or BI Publisher template/output file name and path.
F14-Memo	F14 - exits to the Generic Text entry screen to allow the user to enter/update generic text for the Transformation Template.

Distributing a DREAM Writer Report with EDD

The EDD process can be run in batch mode to distribute a report created by the Import/Export process. By associating a Distribution Profile, E-mail Template, and Transformation Template, the user can control the method of report distribution, e-mail text, and the format of the report.

From DREAM Writer (G81), choose Version List

1. On Version List, locate the version of the report you want to distribute.
2. Change the version and access the Additional Parameters screen.
3. On Additional Parameters, choose Batch Export Parameters (F6).

4. On Spooled File Export Parameters, complete the following fields:
   - Import Export File
   - IFS Path
   - Distribution Profile
   - E-mail Template
   - Transformation Template

Field	Explanation
File Name	The name of the import / export file located in an IFS directory. You can use the file extensions: ▪ CSV (Comma Separated Values) ▪ XML (eXtensible Markup Language) ▪ XSD (XML Schema Definition) ▪ TXT (Text) *Screen-specific information* If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File / Path Names screen to add or edit long file names. When exporting, you can add to an existing file, replace an existing file or create a new file.

Field	Explanation
IFS Path	The string defining the path to the import / export file on the Integrated File System. For Example: / home / UserID. *Screen-specific information* You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read / write authority to the directory. If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File / Path Names screen to add or edit long file names.
Distribution Profile	EDD Distribution Profile. Enter the name of the Distribution Profile to be used with this version. The Distribution Profile determines the methods used to distribute the document.
E-mail Template	EDD E-mail Template. Enter the name of the E-mail Template to be used for this version. If the Distribution Profile specifies that the document is to be distributed by e-mail, this E-mail Template is used to specify the body and subject of the e-mail.
Transformation Template	EDD Transformation Template. Enter the name of Transformation Template to be used with this version. The Transformation Template specifies the XSL and / or BI Publisher template applied to the document prior to distribution.
Burst Flag	blank – disable bursting for this version
Field Alias	N / A
E-mail List Name	N / A

You can press F4 to browse the IFS directories and select a file and path.

Note: For more information on Import / Export specific fields see the *Exporting Data by Batch* section of the *Work with Import/Export Guide*.

5. Save (Enter) the parameters.
6. Run the version.
7. Verify distribution of document.

Bursting a Report with EDD World Bursting

You can burst a report in two ways, using EDD and Oracle BI Publisher.

Any report can be set up for bursting using Oracle BI Publisher. When using BI Publisher for bursting, the burst and distribution specifications are set up in BI Publisher and EDD simply transfers the entire report to BI Publisher for bursting and distribution.

EDD World bursting is a basic bursting capability that can be used to burst a report created in Import/Export and distribute each section of the report separately. When using World bursting, the Bursting Field Alias must be an Address Book Number (such as AN8) field to be able to determine the e-mail address to be used when distributing the report.

Note: DREAM Writer reports must be enabled for bursting before they burst using EDD World bursting (see *Appendix B* for a list of DREAM Writer reports enabled for World bursting).

	From DREAM Writer (G81), choose Version List

1. On Version List, locate the version of the report you want to distribute.
2. Change the version and access the Additional Parameters screen.
3. On Additional Parameters, choose Batch Export Parameters (F6).

Field	Explanation
File Name	The name of the import / export file located in an IFS directory. You can use the file extensions: ▪ CSV (Comma Separated Values) ▪ XML (eXtensible Markup Language) ▪ XSD (XML Schema Definition) ▪ TXT (Text) *Screen-specific information* If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File / Path Names screen to add or edit long file names. When exporting, you can add to an existing file, replace an existing file, or create a new file.
IFS Path	The string defining the path to the import / export file on the Integrated File System. For Example: / home / UserID. *Screen-specific information* You do not need to specify the ROOT directory in this path string. The directory must exist in the IFS. You must also have read / write authority to the directory. If the file name is too long to display in the parameters window, the system disables this field. Press F2 to access the Long File / Path Names screen to add or edit long file names.
Distribution Profile	EDD Distribution profile. Enter the name of the Distribution Profile to be used with this version. The Distribution Profile determines the methods used to distribute the document.
E-mail Template	EDD E-mail Template. Enter the name of the E-mail Template to be used for this version. If the Distribution Profile specifies that the document is to be distributed by e-mail, this e-mail template is used to specify the body and subject of the e-mail.
Transformation Template	EDD Transformation Template. Enter the name of Transformation Template to be used with this version. The Transformation template specifies the XSL and / or BI Publisher template to be applied to the document prior to distribution.

Field	Explanation
Burst Application Flag	1 – Use World APIs for bursting. This option is valid for file extensions XML, TXT, and CSV. 2 – Use BI Publisher APIs for bursting. This option is only valid for XML file extensions and the user must specify a Transformation Template for BI Publisher to format the report.
Burst on Report Field	Field to be used for bursting.

You can press F4 to browse the IFS directories and select a file and path.

Note: For more information on Import/Export specific fields see the *Exporting Data by Batch* section of the *Work with Import/Export Guide*.

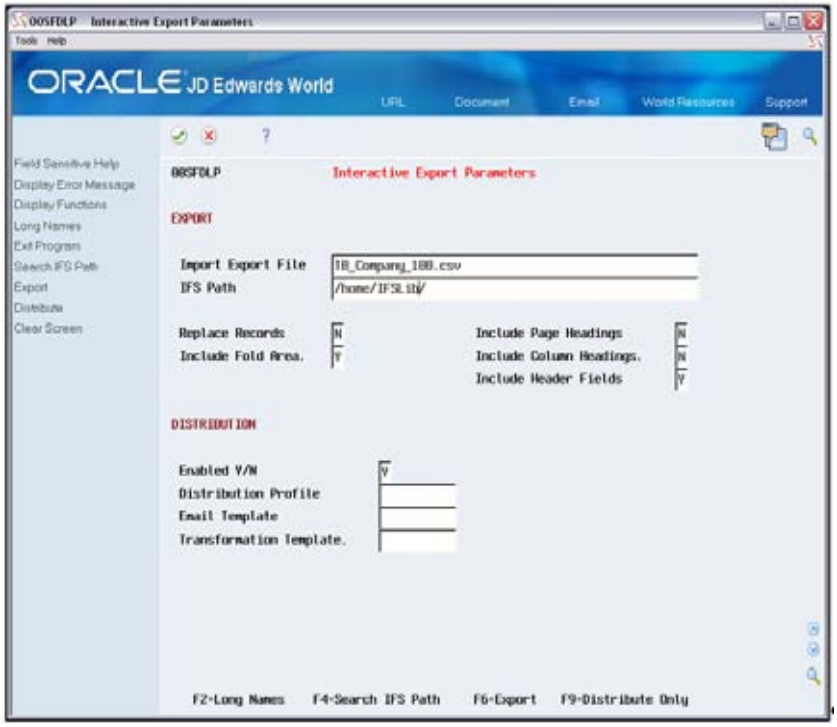
4. Save (Enter) the parameters.
5. Run the version.
6. Verify distribution of document.

Distributing Information Interactively with EDD

When exporting an interactive Import/Export inquiry, parameters can be configured to automatically distribute the output file using EDD.

From within the interactive inquiry or maintenance screen to be distributed, choose F23 or Action Code 'T' to exit to the Interactive Export Parameters screen

1. On Version List, locate the version of the report you want to distribute.
2. Change the version and access the Additional Parameters screen.
3. On Additional Parameters, choose Batch Export Parameters (F6).



Field	Explanation
Import Export File	Name of output file.
IFS Path	IFS directory where output file is created.
Replace Records	Flag to indicate if output file must be cleared or if records must be appended to existing file.
Include Fold Area	Flag to indicate if report must include fold area fields.
Include Page Headings	Flag to indicate if page headings must be included in output file.
Include Column Headings	Flag to indicate if column headings must be included in output file.
Include Header Fields	Flag to indicate if page header fields must be included in output file.
Enabled Y / N	Flag to indicate if distribution is enabled.
Distribution Profile	Name of Distribution Profile to be used with the report.
E-mail Template	Name of E-mail Template to be used with the report.
Transformation Template	Name of Transformation Template to be used with the report.

Sending an Ad hoc E-mail with EDD

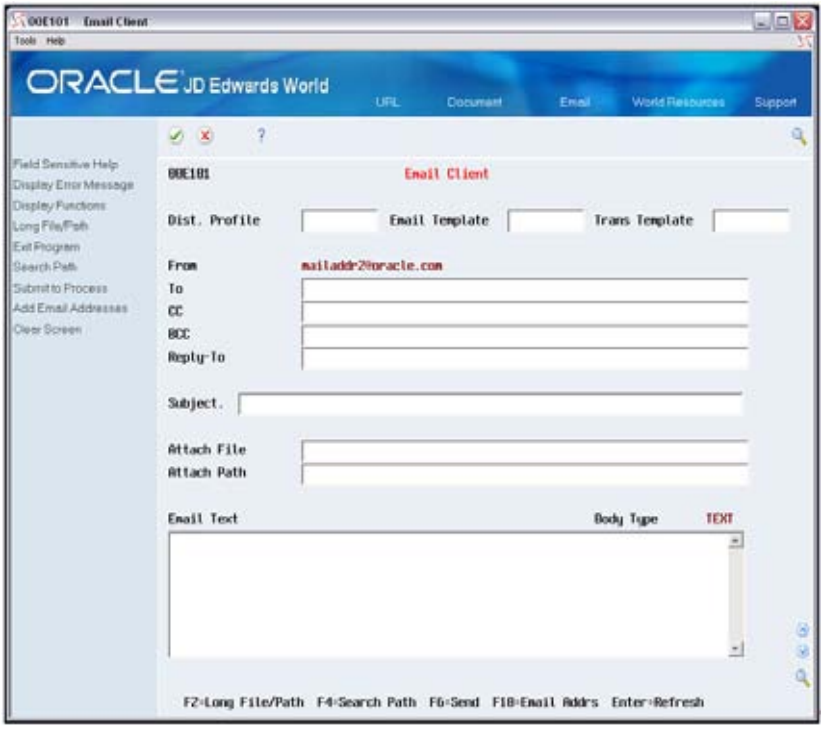
The EDD E-mail Client allows users to send ad hoc e-mails from JD Edwards World software. The user can specify a combination of e-mail addresses and Distribution Profile to specify the e-mail recipients. The user can also include text for the body of the e-mail or specify an E-mail Template to be used for the e-mail body and subject. An attachment file name and path can also be included. If no Distribution Profile is supplied, the default SMTP server (see *Setting up the xdodelivery.cfg configuration file*) is used.

Note: The FROM address is a protected field displayed on the E-mail Client screen. The FROM address is determined in the following way using the current user:

1. If the User Information (2/G94) contains an Employee Address Number, that number, along with the E-mail Address Code in the EDD Configuration (F00E05) file, is used to look up the E-mail address in the F01018 file. If there are multiple values for the Address Number/E-mail Address Code combination in the F01018, the first Email type 1value is used. If no value is found in the F01018 for the Address Number/E-mail Address Code, the default FROM address from the EDD configuration file (F00E05) is used. If the E-mail Address Code in the F00E05 is blank and no record is found in the F01018, the first e-mail address for the current user found in the F01018 is used.

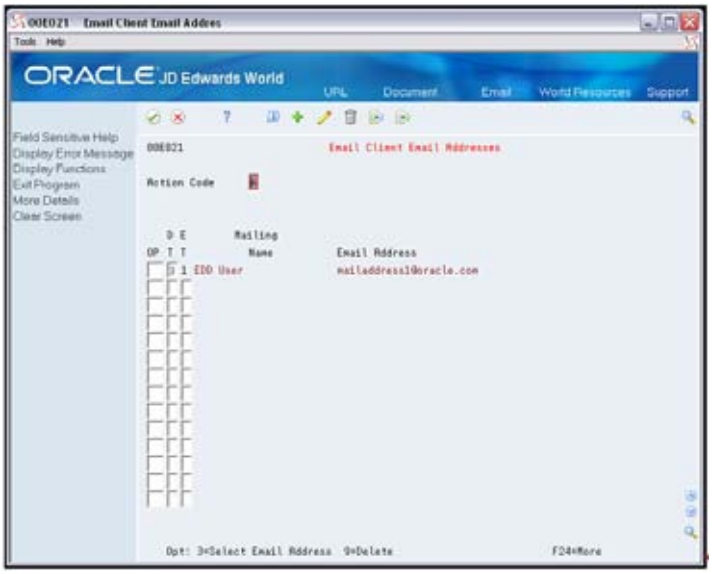
2. If there is no Employee Address number specified in the User Information, the default FROM address retrieved from the EDD configuration file (F00E05) is used.

From Electronic Document Delivery Menu (G00E), choose option 14- E-mail Client



Field	Explanation
Dist. Profile	Name of the Distribution Profile to be used for this e-mail. F1- brings up a list of Distribution Profiles.
E-mail Template	This is the name of the E-mail Template to be used for this e-mail. When the E-mail Template is changed, the Subject, Body Type, and E-mail Text are reloaded from the selected template. F1- brings up a list of E-mail Templates.
Trans Template	This is the Transformation Template to be used for the transformation. F1- brings up a list of Transformation Templates.
From	This is the FROM address for the e-mail. The address is determined based on the current user (see *Note* in section *Sending an Ad hoc Email with EDD* on how FROM address is determined).
To	To addresses to be used for this e-mail. This value can be typed in manually, entered using the F10- E-mail Addrs function, or retrieved from a Distribution Profile. If there are multiple To addresses, the field displays the message Multiple Values.

Field	Explanation
CC	CC addresses to be used for this e-mail. This value can be typed in manually, entered using the F10- E-mail Addrs function, or retrieved from a Distribution Profile. If there are multiple CC addresses, the field displays the message Multiple Values.
BCC	BCC addresses to be used for this e-mail. This value can be typed in manually, entered using the F10- E-mail Addrs function, or retrieved from a Distribution Profile. If there are multiple BCC addresses, the field displays the message Multiple Values.
Reply-To	This is the Reply-To address for the e-mail, which can be manually entered, retrieved from the F10-E-mail Addrs screen, or retrieved from the Distribution Profile.
Subject	This is the subject line for the e-mail, which can be manually entered or is loaded from an E-mail Template.
Attach File	This is the file name for a file being attached to the e-mail.
Attach Path	This is the path to the attachment file.
E-mail Text	This is the text for the body of the e-mail. This text can be manually entered or retrieved from the Generic Text on an e-mail Template.
Body Type	This is a display only field showing the body type of the e-mail body. This value is loaded from an E-mail Template or defaults to TEXT if no template is specified.



Field	Explanation
Option	Enter option to add an e-mail address or delete an address.
Delivery Type	Enter the delivery type for this address. Valid values: 2 - Reply-To 3 - To 4 - CC 5 - BCC
E-mail Type	Enter the e-mail type. Currently, the only valid e-mail type for the E-mail Client is 1 – E-mail Address.
Mailing Name	Display Only – Mailing Name from F01018.
E-mail Address	Display Only – E-mail Address from F01018.

Appendix A - EDD Files

The following table lists tables used in the EDD process.

Table	Description
F00E01	E-mail List Master.
F00E011	E-mail List Detail.
F00E02	Distribution Profile Master.
F00E021	Distribution Profile Detail.
F00E03	Transformation Template Master.
F00E04	E-mail Template Master.
F00E041	E-mail Template Text .
F00E042	E-mail Template Variables.
F00E05	EDD Configuration Master.
F00E06	EDD Transaction Master.
F00E061	EDD Transaction Detail (E-mail Addresses).
F00E062	EDD Transaction Text.
F00E063	EDD Transaction Paths.
F00E064	EDD Transaction Variables.
F00E06X	EDD E-mail Client Server File.

Appendix B – DREAM Writer Reports Enabled for World Bursting

The following table lists DREAM Writer reports enabled for bursting using the EDD World bursting process.

Report	Description
P43530	Print Quote Request.