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# **JD Edwards World Common Foundation Guide**

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**Version A9.1**

**Revised - January 15, 2007**

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# 1 Common Foundation Overview



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# Overview to Common Foundation

JD Edwards World offers a broad suite of business systems called the Common Foundation. There is a general “look and feel” across all of these systems.

The *Common Foundation Guide* introduces you to JD Edwards World systems as an integrated environment. Use the *Common Foundation Guide* to become familiar with the user interface, menus, screens, and the basics of JD Edwards World systems. Once you are familiar with this environment, you can easily move between all the JD Edwards World systems.

This section contains the following:

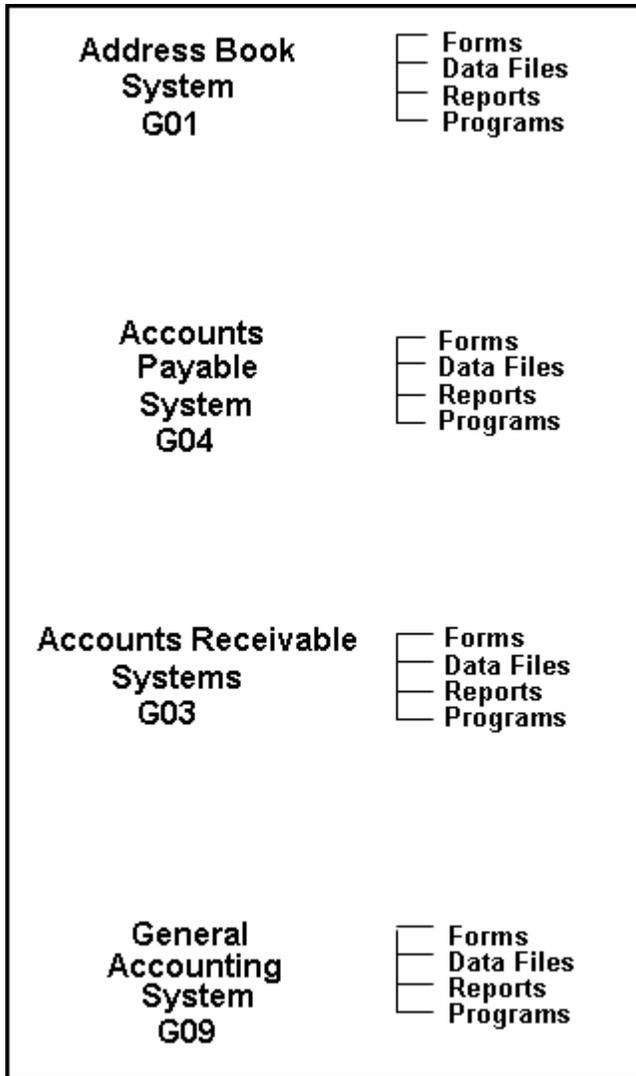
- [System Integration](#)
- [System Features](#)
- [About the Common Foundation Guide](#)

## System Integration

JD Edwards World refers to each group of its software products as a system. Each system contains screens, data files, reports, and programs that are designed for a specific business need.

For complex business situations you might use several systems to achieve a comprehensive solution.

The following illustration shows four different systems you might use when performing a company’s accounting tasks. Because the functions and features of all the systems are similar and integrated, the user is unaware of moving from one system to another.



The following list identifies JD Edwards World systems in JD Edwards World:

System Number	System
00	General Back Office
01	Address Book
02	Electronic Mail
03	Accounts Receivable
03B	Enhanced Accounts Receivable
03C	Customer Issue Tracking
04	Accounts Payable
05	Standalone Time Accounting
06	Old Payroll

<b>System Number</b>	<b>System</b>
07	New Payroll
08	Human Resources
08A	Application Tracking
08B	Benefits Administration
08C	Canadian Specific HR Functions
08H	Health and Safety
08P	Position Control
08R	Requisitions
08U	US Specific HR Functions
08W	Wage and Salary
09	General Accounting
09E	Expense Reimbursement Reporting System Only
10	Financial Reporting
10C	Multi-Site Consolidations
11	Foreign Currency/Cash Basis
11C	Cash Basis Accounting
12	Fixed Assets
13	Equipment/Plant Management
14	Modeling, Planning, and Budgeting
15	Commercial Property Management
16	Residential Property Management
17	Customer Service Management
17A	Ariba Integration Reporting Purposes Only
17C	Call Management Reporting Purposes Only
18	Resource Scheduling Reporting Purposes Only
19	Utility CIS
20	Energy Data Base

<b>System Number</b>	<b>System</b>
21	Lease Management
22	Production System
23	Revenue Distribution
24	Contracts
25	Joint Interest Billing
26	Gas Balancing
27	Investor Services
28	Projects on Hold – Energy
29	AFE Accounting
30	Product Data Management
30A	Product Costing Reporting Only
31	Shop Floor Control
31A	Manufacturing Accounting
3110	Process Control
32	Configuration Processing
32C	Custom Works
33	Capacity Requirements Planning
34	DRP/MPS/MRP
34A	Advanced Planning & Scheduling
35	Enterprise Facility Planning
36	Forecasting
37	Quality Management
38	Distribution Contracts
39	Bulk Stock Control
40	Inventory/OP Base
4010	Advanced Price Adjustments
41	Inventory Management
41B	Bulk Stock Control
42	Sales Order Processing

<b>System Number</b>	<b>System</b>
42A	Sales Force Automation Reporting Purposes Only
42B	Enterprise One Sales Order Entry
42E	ECS Sales Order Processing
43	Purchase Order Processing
44	Contract Administration
44H	Homebuilder Management
4401	Homebuilder Management
45	Advanced Price Analysis
46	Warehouse Management
47	Electronic Data Interchange
48	Work Order Processing
48S	Service Billing
49	Transportation
50	Job Cost Accounting
51	Job Cost Accounting
52	Job Cost Billing
53	Change Management
55-59	Reserved for Clients
60-69	Reserved for JD Edwards World Custom
70	Multi-National Products
71	Client Server Applications
73	M&D Complimentary Products
74	EMEA Localizations
74G	Greece
74H	Hungary
74I	Ireland
74L	Portugal
74N	Nordics

<b>System Number</b>	<b>System</b>
74P	Poland
74R	CIBS
74S	Spain
74T	Turkey
74Z	Czech Republic
75	Asia Pacific Localizations
75H	Thailand
75I	India
75K	South Korea
7T	Taiwan
76	Latin American Localization
76A	Argentinean Localization
76C	Columbia
76H	Chile
77	Canadian Payroll
77Y	Canadian Payroll Year End Programs Reporting System Only
78	OBSOLETE CS Travel Expense Management
79	OBSOLETE Foreign Translation
80	Business Intelligence
81	DREAM Writer
82	World Writer
83	Finance Report Writer-FASTR
84	Distributed Data Processing
85	Custom Programming
86	Foreign Language Translation
87	JD Edwards World Internal
88	Cautious Purge System
89	Conversion Programs

System Number	System
91	Documentation
92	Computer Assisted Design
93	Computer Assisted Programming
94	Security Officer
95	Unattended Night Operations
96	Computer Operations
97	Software Load & Install
98	Technical Aids
98e	Electronic Burst & Bind
98FT	Form Type
98SA	Sample Application
99	Technical Aids – Internal
99D	Technical Tools – DASD Sizer Reporting Purposes Only
99M	Technical Tools - Masters/Update Reporting Purposes Only

## System Features

JD Edwards World business application software includes a character-based format and a web user interface. The common foundation features for either presentation include:

- Task-oriented menus
- Extensive online help that shows you how to complete a task
- Detail areas that present the records you are using in a logical sequence
- Category codes that further define your database records

### See Also

- *Introduction to JD Edwards World* for further information on interface presentations.

## About the Common Foundation Guide

This guide is for release A9.1 of JD Edwards World software. Screens shown are from LegaSuite GUI from Seagull Software (formerly J Walk) and are only examples. If your company operates at a different software level, you might find discrepancies between what is shown in this guide and what you see at your computer.

This guide is separated into sections to guide you through the operations and functions that are common to all systems.

Sections	Description
User interface	Become familiar with the keyboard and how you enter the commands to complete the operations you want to perform. This includes signing on and off the system.
Menus and screens	Learn how to navigate among the screens and systems you have available. Become familiar with the presentation and features available on various screens and menus.
Online help	Using both field-level and program-level help, immediately access online help instructions.
Records	Learn how to locate, add, and work with records. Tailor your data to your needs by assigning valid values and user defined categories.
Reports	Using JD Edwards World report formats, learn how to create your own report version, work with version processing options, and submit your version for print.

The purpose of this guide is to provide:

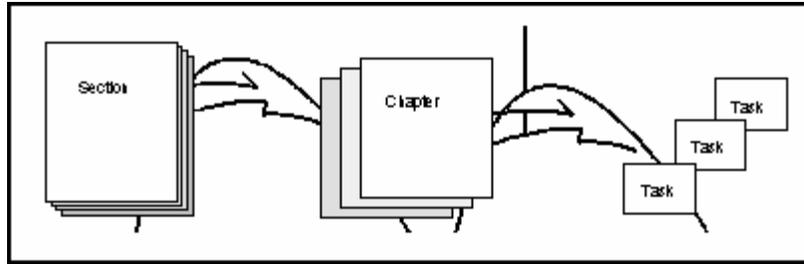
- A textbook for students in a training class
- A resource for students after training
- Reference material for users who do not attend class

This guide describes the “big picture” and how programs work together through overviews, illustrations, procedures, examples, and exercises. It is intended primarily for two audiences:

- Students in the classroom
- Users and those who support the product who have not attended class

## Organization of the Guide

This guide is divided into sections for each major function. Sections contain chapters for each task or group of related tasks. Within each chapter you will find information you need to accomplish the tasks such as running programs or printing reports. Generally, chapters include an overview, screen or report samples, and procedures.



When it is appropriate, chapters also explain warnings or error situations.

This guide has a general table of contents at the front of the guide. It also includes an index to help you locate information quickly.

## Icons and Terms Used in this Guide

This book contains icons that provide visual clues to the content of a topic or paragraph.

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**Note:** The note identifies text that is supplemental. It might be a hint, a suggestion, or additional information.

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**Caution:** Caution is used when you might get unexpected results if you set up and run a process in a given way, you need to verify other information affecting the outcome of a process, or when there might be serious implications for a given action, such as irrecoverable loss of data.

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The following terms have specific meanings when used in this guide.

Terms	Description
Selection	A numbered menu item
Option	An action you can take by using the O (Option) field on a screen. You use options to: <ul style="list-style-type: none"> <li>▪ Access another screen or window</li> <li>▪ Perform another function</li> </ul>
Type	To key or type information in a field
Complete or Enter	To type information and then press the Enter key or click on the appropriate icon
Click	To place the pointer over a selection or icon and press the left mouse button
Choose	To select from a group by either: <ul style="list-style-type: none"> <li>▪ Clicking an item</li> <li>▪ Entering a selection or an option in a field</li> </ul>



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## **2 Introduction to JD Edwards World Software**



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# Overview to JD Edwards World Software

## Objectives

- To become familiar with using the keyboard or mouse to interface with the system
- To learn how to enter and exit the system with assigned passwords
- To understand how the system uses time-outs for security and operation purposes

## About JD Edwards World

JD Edwards World is available in two different presentations:

- Web user interface
- Character-based, also called “green screen”

The presentation you see depends on which one your company has chosen to install. The system processes all the applications in the same way regardless of the presentation. The character-based presentation requires you to enter information and use key functions for all tasks. With the web presentation, you can enter information and use the mouse to choose icons or items. Additionally, in the web presentation, you can use the key functions to complete a task.

Although JD Edwards World includes both the character-based interface and the web interface, for the purposes of this guide, the term JD Edwards World will refer only to the web presentation.

The following differences are the most apparent:

<b>Web interface</b>	<b>Character-based interface</b>
Click icons to locate, add, change, or delete information.	Enter an I, A, C, or D in the Action Code field to locate, add, change, or delete information.
Choose functions from either the navigation bar or by pressing a function key (F key) to access additional screens or functions.	Press a function key (F key) to access additional screens or functions.
Use mouse actions on icons to scroll through lists of records.	Press keys to scroll through lists of records.
Use mouse actions on icons or F keys to return to previous screens or menus.	Use F keys to return to previous screens or menus.

To become familiar with both presentations, complete the following tasks:

- Understand the system interface
- Sign On and Sign Off the system
- Understand time-outs

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# Understand the System Interface

## About the System Interface

This chapter introduces you to the keys used in JD Edwards World and provides examples of the functions available in the web interface.

If your company uses the web presentation, you can click the icon or list item with your mouse or use any of the PC key functions.

Use the various keys to provide commands to your computer. Many keys consistently perform the same action regardless of the screen or menu you are using. These are called standard function keys. PC keyboards are different than AS/400 keyboards, but can be emulated to perform the same interface with different key strokes.

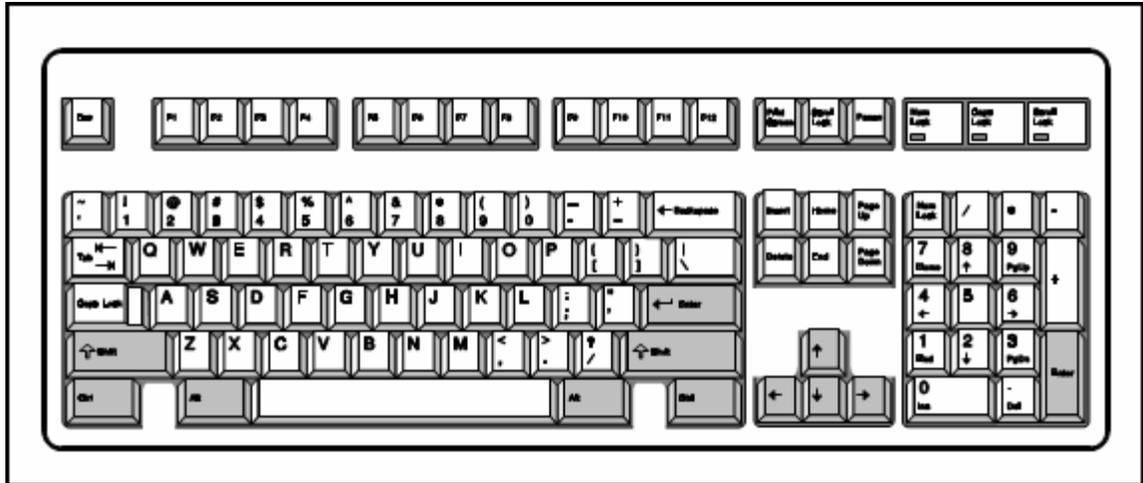
This section contains the following:

- [About the PC Keyboard](#)
- [About the AS/400 Keyboard](#)
- [Important Keys](#)
- [Web Icons](#)
- [Standard Function Exits](#)

## About the PC Keyboard

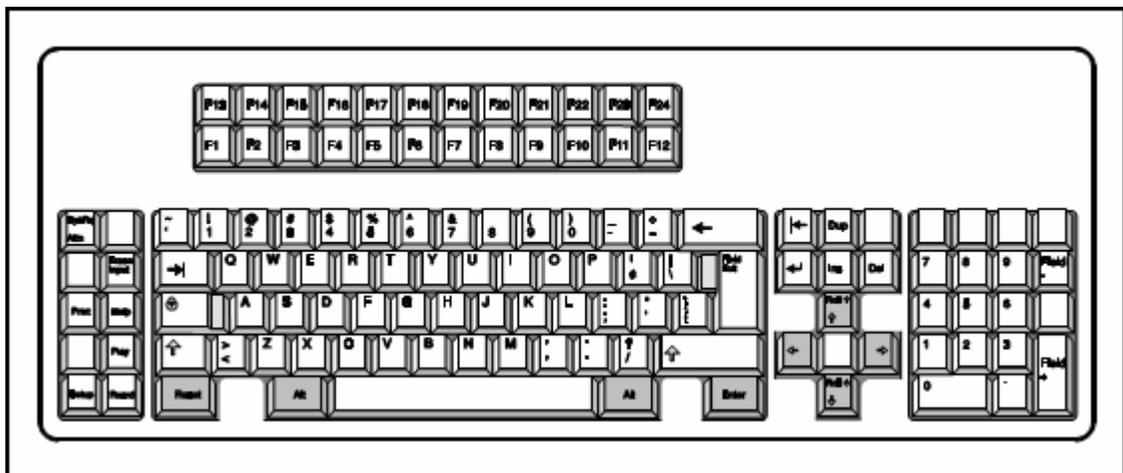
The illustration below depicts a typical PC keyboard, which can be emulated as a regular AS/400 terminal keyboard. The main portions of the keyboard are:

- Function keys (F1-F12)
- Typewriter keyboard
- Numeric keypad
- Cursor movement keys (grey in color)
- Other IBM control keys (grey in color)



## About the AS/400 Keyboard

The illustration below depicts the layout of the standard AS/400 keyboard. This keyboard contains 122 keys.



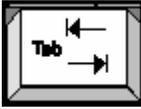
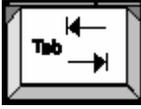
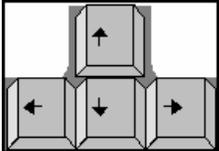
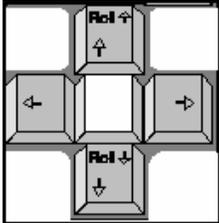
## Important Keys

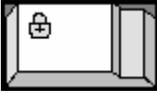
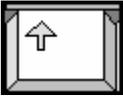
The following table identifies which key on the PC keyboard or the AS/400 keyboard to use to perform various functions. You will find it helpful to be familiar with both keyboards if you must move from one type of equipment to another.

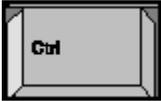
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**Note:** You can map your keyboard to suit your personal needs. However, in the web interface, the keyboard is always mapped to the standard settings for a windows environment.

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PC Keyboard	122-Key Keyboard	Key Name	Description
		Field Advance Key	Moves the cursor forward to the position of the next input field.
		Field Backspace Key	Moves the cursor back (left) to the first position of either the current input field or the previous input field.
			
		New Line Key	Moves the cursor to the next line — first position of the first available input field.
			
		Cursor Movement Keys	The four cursor movement keys move the cursor in the direction indicated by the arrow on the key. You can move anywhere on the screen, including outside input-capable fields.
PC Keyboard	122-Key Keyboard	Key Name	Description
		Backspace	Moves the cursor back to the previous position in which you can enter data. If the cursor is in the first position of an input field, it moves to the last position of the preceding input field.

PC Keyboard	122-Key Keyboard	Key Name	Description
		Field Exit	Moves the cursor to the next input field and deletes any characters from the current cursor location to the end of the field.
		Enter	Sends data to the computer for processing.
		Caps Lock	Alphabetic characters (A-Z) are entered as uppercase. On the 122-key keyboard, symbols and punctuation marks on the upper half of the other keys are entered as well.
		Shift	<p>When you press and hold the Shift key:</p> <ul style="list-style-type: none"> <li>Alphabetic characters (A-Z) are entered as uppercase letters.</li> </ul> <p>Symbols and punctuation marks on the upper half of the other keys are entered.</p>

PC Keyboard	122-Key Keyboard	Key Name	Description
<p>Use the Left</p> 		Reset	<p>Use the Reset function key to:</p> <ul style="list-style-type: none"> <li>Unlock the keyboard when an error message flashes at the bottom of the screen. Repeat if necessary.</li> <li>End the insert and system request functions</li> </ul> <p>Note: PC keyboards will not lock due to an error message.</p>

PC Keyboard	122-Key Keyboard	Key Name	Description
	 <p>and</p> 	Page Up	<p>Use the Roll Down key while pressing and holding the Shift key (122-key keyboard only). Will replace the current data on the screen with the previous page.</p>
	 <p>and</p> 	Page Down	<p>Use the Roll Up key while pressing and holding the Shift key (122-key keyboard only). Will replace the current data on the screen with the next page (data below the current display screen).</p>
		Help	<p>The Help function provides:</p> <ul style="list-style-type: none"> <li>An explanation of IBM error conditions</li> <li>Help from the system</li> </ul>

PC Keyboard	122-Key Keyboard	Key Name	Description
 and 		Duplicate	Duplicates the previous line on the current line.

Various JD Edwards World programs utilize function keys F1 through F24 for a variety of functions.

Keyboard	Key Name	Description
	PC Function Keys	A PC keyboard has a set of function keys from F1 - F12. To access function keys F13 - F24, press the Shift key in conjunction with function keys F1 - F12.  F1 + Shift = F13 F2 + Shift = F14
	122-Key Function Keys	The 122-key keyboard has a full set of function keys.

## Web Icons

Clicking an icon in the web presentation corresponds to keystrokes for JD Edwards World character-based presentation. In the web interface, you can use the icon instead of using the Action Code field that appears on the character-based screens. You can also use the same keystrokes that you use in the character based presentation.

Some icons are specific to certain applications and do not appear on every screen.

Hover Help is a feature in the web interface that displays a brief, online note regarding the action the icon performs. You access Hover Help by placing the cursor over an icon without clicking. The note appears in a box.

Following are the standard web icons:

Icon	Description
	Works as the Enter key – same as the Enter key on your keyboard.

Icon	Description
	Signs you off the JD Edwards World Web enablement.
	Exits the current application panel.
	Used for hidden selections (HS).
	Help for an application or menu.
	Inquire.
	Add.
	Change.
	Delete.
	Import data.
	Export data.
	Shows a list of valid values.
	Page up.
	Page down.

## What You Should Know About

Links and Icons	Description
<b>Menu selection</b>	Menu options are links. When you hover the cursor over a selection, it changes color. Click a link to access the menu.
<b>Web browser buttons</b>	The standard buttons from your web browser such as Back, Forward, and Home; will not work properly to navigate the JD Edwards World software.

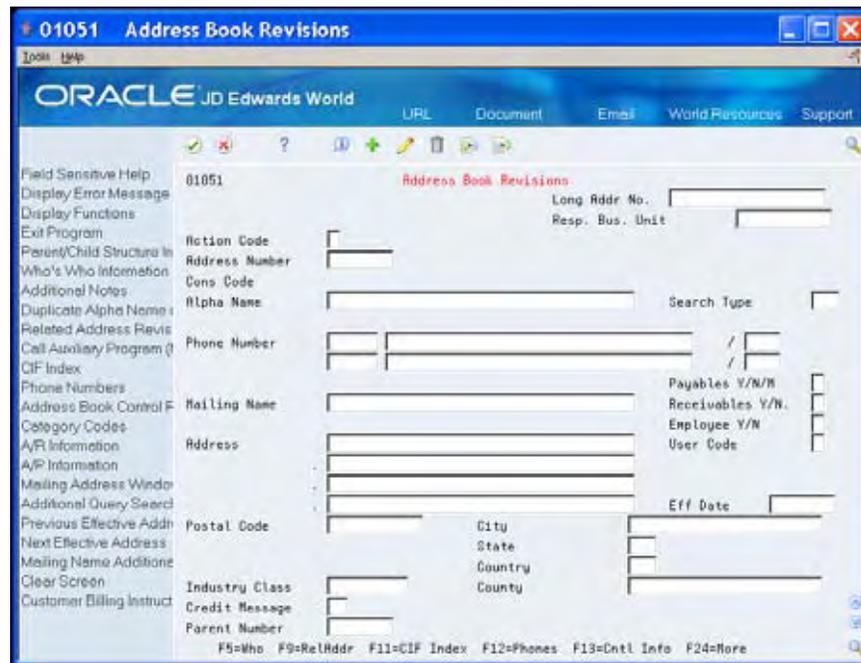
## Standard Function Exits

JD Edwards World specifies certain function exits to use for the same function regardless of the system in which you are working. The system identifies function exits by the name, followed by the letter F and a number. For example, the function exit Menu Word Search is shown as Menu Word Search (F8). In the web interface, you can use the navigation bar on the left side of the screen or the function keys. In the character-based interface, you can only use the function keys.

You can select function exits two ways:

1. As you hover over each entry in the navigation bar, the function exits highlight. Click the mouse to execute the selected function.
2. Press 'F-Key' from the keyboard to execute the function.

As you navigate through the system, you will notice how all function exits are available in the navigation bar and additionally some are at the bottom of the screen. The navigation bar displays in main screens and lists all available functions. The list of function exits changes based on the screen you are viewing. Functions vary according to the screen. Because of screen sizing limitations, the descriptions for some of the exits are truncated. To view a complete description, hover the cursor over one of these truncated options and a balloon appears with the full description of the option, including the corresponding 'F-key'.



F24 provides a Help window with the available function keys from any menu, screen, or program.

## Standard Function Keys Available from Menus

The following table describes the standard function keys and for menus:

Function Exit	PC Keyboard	AS/400 Keyboard	Explanation
Command Entry		F4	Displays the command entry prompt. If your menu displays a set of command entry lines and you type an IBM command, pressing this function key accesses the IBM command prompt screen, where you can add information applicable to the command you just typed.
Menu Word Search		F8	Accesses the Menu Word Search window where you can search for menu selections.
Retrieve Previous Command		F9	Redisplays up to 30 previous commands.
Return to Previous Menu		F12	Returns to the previous menu. By pressing F12 repeatedly, you can reverse your path for up to 20 menus.
Fast Path Commands	Shift + F1	F13	Displays a window that lists the mnemonic commands for fast path menu travel. You can choose the menu or screen you want from the window or enter the command from a menu.
Check for new E-mail	Shift + F3	F15	Checks for waiting E-mail messages.
Menu List Window	Shift + F4	F16	Displays the Index of Menus window where you can review a list of all menus available to you.
DREAM Writer Processing Options	Shift + F6	F18	Accesses DREAM Writer processing options when you type a menu selection and press F18.

## Standard Function Keys Available from Screens

Using function keys available from a screen, you can perform a number of tasks. Although some of the function keys vary from screen to screen, there are standard keys that you can use from any screen. The following table describes standard function keys for screens:

Function Exit	PC Keyboard	AS/400 Keyboard	Explanation
Field Sensitive Help		F1	Displays JD Edwards World field level help. You will see one of the following types of information: <ul style="list-style-type: none"> <li>▪ An explanation of the field's purpose and any data entry considerations</li> <li>▪ A search screen that lets you find a valid code</li> <li>▪ A list of valid values for the field</li> </ul>

<b>Function Exit</b>	<b>PC Keyboard</b>	<b>AS/400 Keyboard</b>	<b>Explanation</b>
Exit		F3	Exits a function and returns to the original screen or menu, ignoring changes you just made.
Display Detail		F4	Displays the detail area for more detailed information.
Display Error Message		F7	Displays error messages if you make a mistake while entering information in a field.
Retrieve Screen		F12	In some cases, F3 and F12 work alike. However, there is an important difference between the two. If you perform a function that involves a number of different screens that you access in a logical progression, such as the steps in the DREAM Writer version processing procedure, and both F12 and F3 are available, you exit f that function entirely using F3, while F12 returns you to the previous step in that progression.
Clear Screen	Shift + F10	F22	Clears the screen. All fields clear and an empty screen displays for further data entry. This key eliminates the need to clear a number of fields in order to enter new information.

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# Sign On and Sign Off the System

## Signing On and Signing Off the System

For efficiency and security purposes, you must sign on and sign off the system. These processes are often called sign on and sign off. To learn how to do this, complete the following tasks:

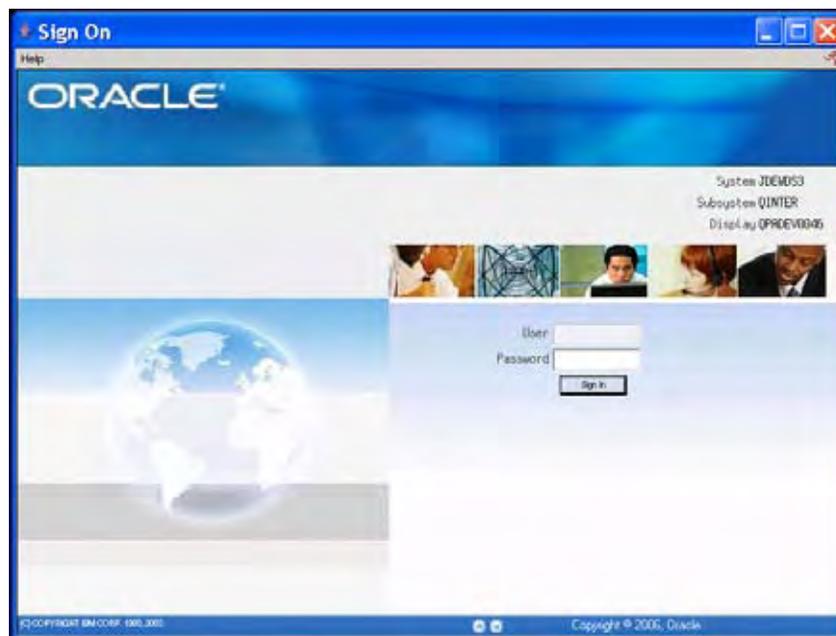
- [Signing On to the System](#)
- [Signing Off the System](#)

## Signing On to the System

You must have a user ID and password to sign on to the system.

To sign on to the system

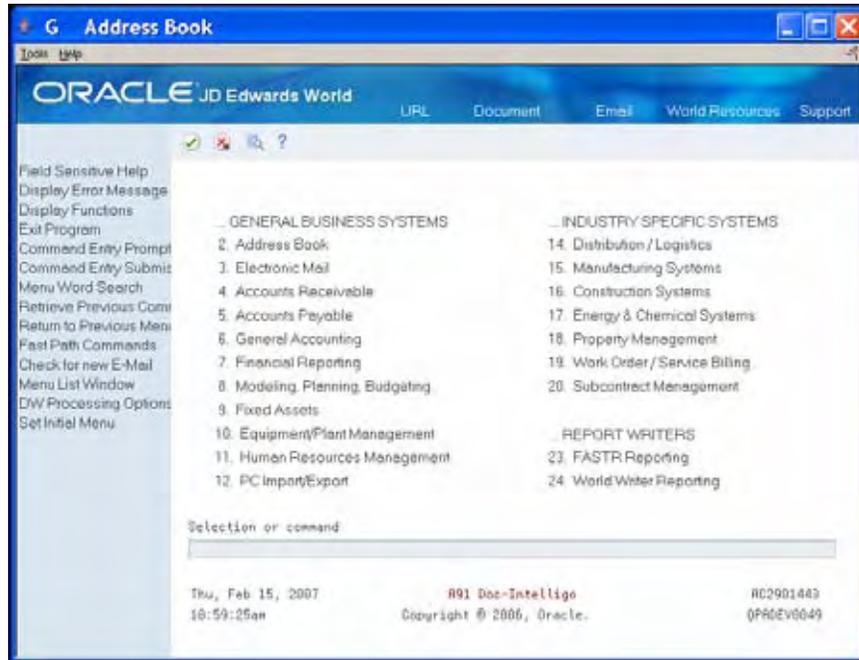
On Sign On



Complete the following fields:

- User
- Password

The Master Directory displays.



Field	Explanation
User ID	<p>The User ID is the name that identifies you to the computer. It is:</p> <ul style="list-style-type: none"> <li>▪ Usually assigned by the security officer system (QSECOFR)</li> <li>▪ Used by the computer to associate your work</li> </ul>
Password	<p>You define a password to identify you as the owner of the User ID. The system will not accept a password that has not been previously defined.</p> <p>When you enter your password, you will be unable to see what you are typing. The system hides the entry in this field so that others do not see your password</p> <p>Depending on your system setup, you might need to define a new password on a regularly established basis, such as every 30 days.</p>

## Signing Off the System

You should always sign off the system when you have completed your work.

**Caution:** Do not turn off your workstation in the middle of an application. You should turn off your workstation only after you have signed off the system

## To sign off the system

On any command line



Do one of the following:

- Click the Sign off icon.
- Enter one of the following:
  - .. (two periods)
  - 90 (the hidden selection to sign off the system)
  - Signoff (if your system permits IBM Command Entry)



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# Understand Time-Outs

## About Time-Outs

Time-outs are a workstation feature that interrupts computer usage if a user does not make an entry within a specific period of time. The two types of time-outs are:

- System
- Display

## What Is a System Time-Out?

Two types of time-outs occur on the system:

Type	Description
<b>Time-out of a program</b>	The system returns to a menu.
<b>Exit from the system</b>	The system returns to the Sign On screen.

Both time-outs occur due to lack of activity. You should press any key occasionally to avoid a time-out. Your system operator controls the length of time before a time-out occurs.

## Why Are System Time-Outs Set Up?

System time-outs are used for two reasons:

Reason	Description
<b>Security</b>	If you leave your computer unattended, the time-out prohibits anyone from using the system.
<b>Operations</b>	Certain types of jobs require that no users access the system when the job is running. If you leave your computer for an extended period of time, the time-out allows the job to be run.

## What Is a Display Time-Out?

After a predefined number of minutes, the monitor goes blank. Press any key or move the mouse to activate the system to return to the display.

Display time-outs save you the life of your monitor. The display time-outs are an optional setup for a terminal.

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## 3 Menus



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# Overview to Menus

## Objectives

- To become familiar with menu format and appearance
- To use the pull-down menu bars on menus
- To navigate among menus

This section contains the following:

- [About Menus](#)
- [How Are Menus Designed?](#)
- [About Menu Format](#)
- [About Menu Levels](#)
- [System Codes](#)
- [How JD Edwards World Character-based and Web Interface Menus Differ](#)

## About Menus

A menu on a computer is similar to a menu in a restaurant. It offers you a number of choices. Menu selections present ways to access either a program or another menu.

To become familiar with menus, complete the following tasks:

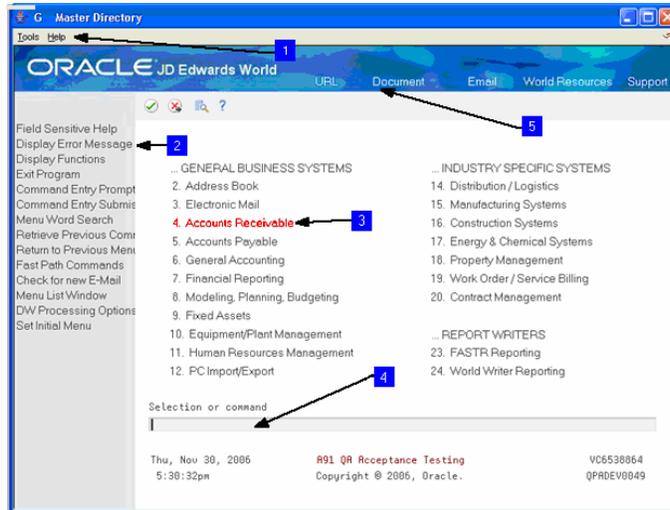
- Use the menu bar on a web interface menu
- Navigate menus

## How Are Menus Designed?

JD Edwards World menus are designed to be task-oriented and to have a consistent format. Every menu displays up to 24 menu selections, which are typically unique to a system.

## About Menu Format

The following example is the Master Directory menu. The Master Directory is a “menu” of menus. Every selection on this menu accesses another menu.

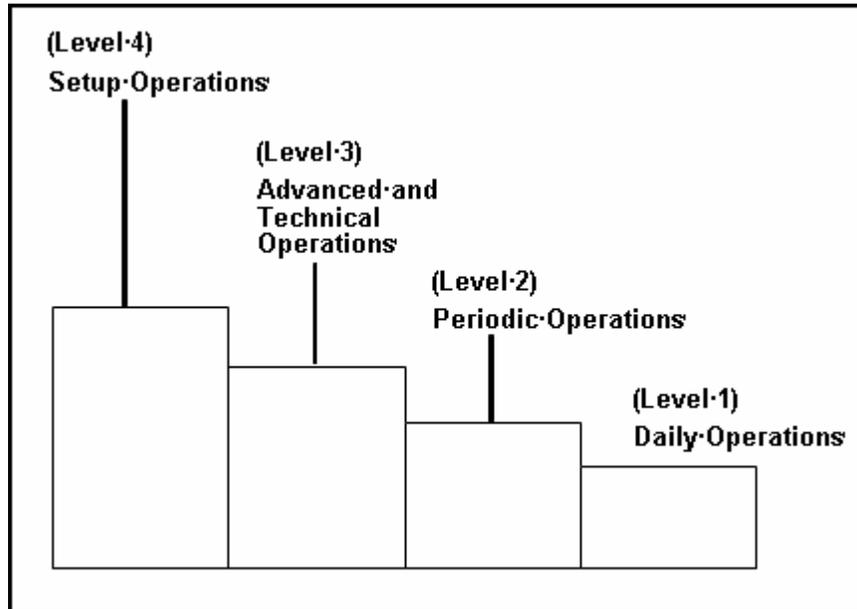


The following list provides information about the main portions of a menu:

- Menu ID - in this example, the menu ID is “G”
- Menu Title - in this example, the menu title is “Master Directory”
- Context Sensitive Menu (1) – displays beneath the menu title with different options available, based on the screen.
- Navigation Bar (2) – allow access to functions that vary according to the screen. Includes the selections on the left side of the screen as well as the icons above the available menu selections.
- Menu Options (3) - the available menu options display in two columns that appear in the center of the menu and are links.
- Command Line (4) - use the command line to enter information that accesses certain menus and programs, for example, enter “G01” to access the Address Book menu
- Links (5) – allow access to Oracle JD Edwards Support and World Resources pages. You can open an e-mail window, open an attachment (document), or go to a URL address

## About Menu Levels

A menu level determines who has access to certain programs. Each level represents a display level that is needed in order to perform the tasks on the menu. The following graphic describes these levels and lists the Address Book menus for each level:



The underlined characters in the following menu numbers indicate the level of the menu.

Level	Description
Level 1	Daily Operations; G01 <u>1</u> (Address Book Daily Operations)
Level 2	Periodic Operations; G012 <u>1</u> (Address Book Periodic Processes)
Level 3	Advanced and Technical Operations; G013 <u>1</u> (Address Book Advanced and Technical Operations)
Level 4	Setup Operations; G014 <u>1</u> (Address Book Setup)

For example, menu number G012xx indicates:

Menu Identifier	Description
G	G Main menu
01	Address Book
2	Periodic operations menu
xx	A variable that differentiates the menu from other periodic operations menus

A display level is assigned in each user's profile, which is stored in the computer. If a user accesses a menu that has an assigned display level higher than the display level assigned to the user, the display level of the menu flashes in the upper-left corner of the menu.

## System Codes

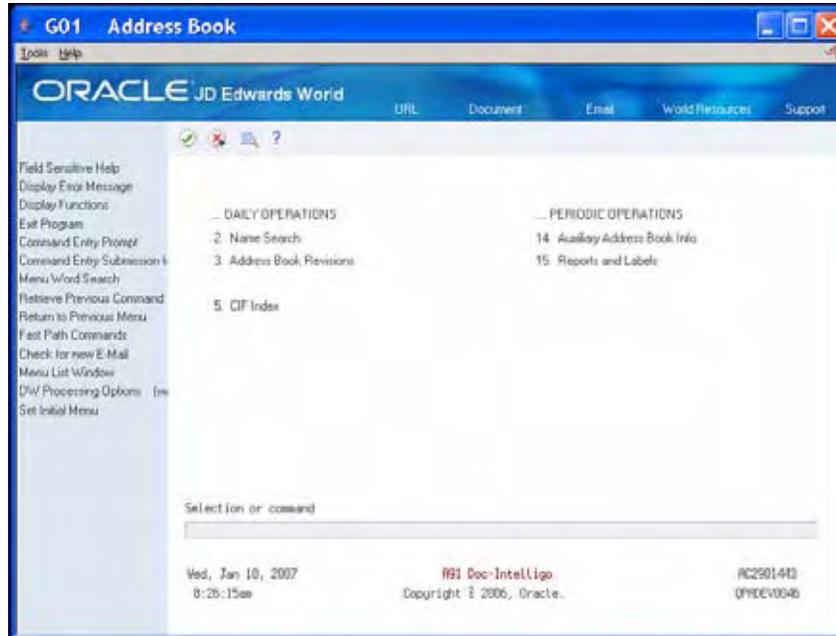
JD Edwards World refers to its software products as systems. Each system contains an entire family of software (programs, data files, screens, and reports) designed to focus on particular business needs.

The Master Directory lists the main menus that access the systems. The G is followed by a system code. See the *Common Foundation Overview* for a full list of system codes.

## How JD Edwards World Character-based and Web Interface Menus Differ

Web interface menus use a graphical interface rather than a textual interface. A graphical user interface allows the alternative of clicking a graphical icon instead of using the keyboard. Additionally, you can access other functions from the navigation bar.

The following example shows a Web interface menu:



The following example shows a JD Edwards World character-based menu.

```
G01 JD Edwards World JDED
Product Groups Address Book

... DAILY OPERATIONS ... PERIODIC OPERATIONS
2. Name Search 14. Auxiliary Address Book Info
3. Address Book Revisions 15. Reports and Labels

5. CIF Index

Selection or command
==>

Wed, Jan 10, 2007 A9.1 QA Test AC2901443
8:28:28am Copyright © 2006, Oracle. QPADEV0141

M a 19/007
```



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# Use the Context Sensitive Menu

## Using the Context Sensitive Menu

The context sensitive menu is located below the title bar and can contain four different pull-down menus. The following is an example of a context sensitive menu:

Functions Options Tools Help

Each of the pull-down menus offers:

- Different options that you might need to perform
- Additional information on the menu selections

The following list details each menu bar available on a menu:

Menu Bar	Description
Functions	Change according to available functions of current screen (Functions might or might not display, based on the current screen).
Options	Change according to available options of current screen (Options might or might not display, based on the current screen).
Tools	Choose the Tools menu to access the: <ul style="list-style-type: none"><li>▪ Attention Program, a user defined program according to the user's profile</li><li>▪ System Request</li><li>▪ Display Messages window</li><li>▪ Clear Cache</li></ul> You can also press Alt + T to access the Tools menu.
Help	Choose the Help menu to: <ul style="list-style-type: none"><li>▪ General help for a program.</li><li>▪ Product information. The product information is the name of the JD Edwards World software and version name.</li></ul> You can also press Alt + H to access the Help menu.



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# Navigate Menus

## Navigating Menus

Navigating menus means moving from one menu to another. To learn how to navigate menus, complete the following tasks:

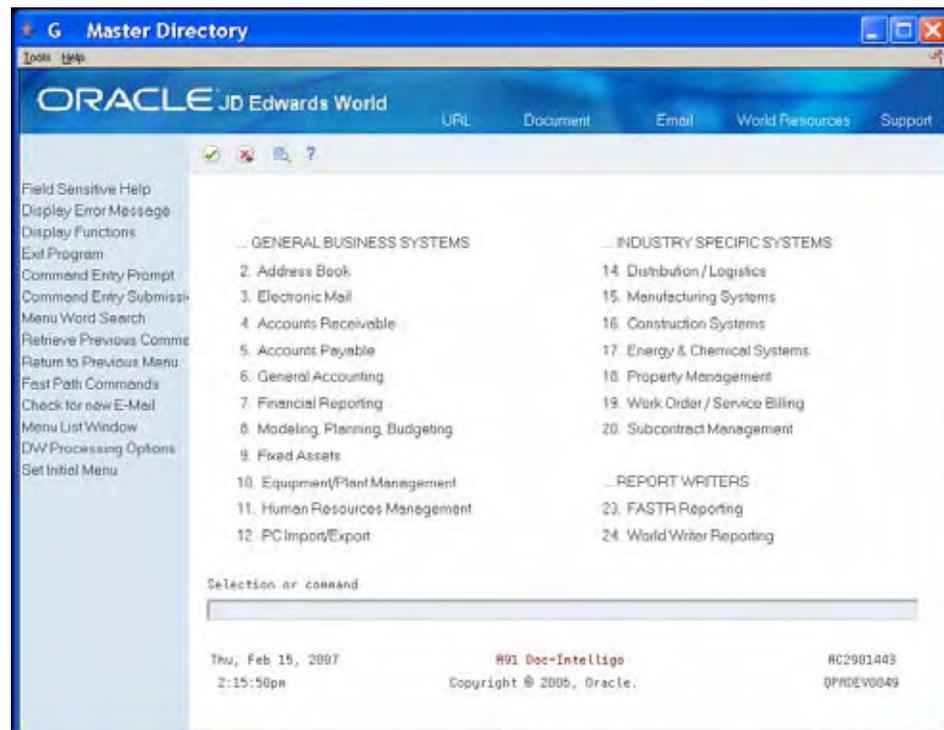
- [Choosing a Menu Selection](#)
- [Entering a Menu ID](#)
- [Using Function Exits to Navigate Menus](#)
- [Accessing Hidden Menus](#)

## Choosing a Menu Selection

Menu selections can either point to another menu or directly access a program.

### To choose a menu selection

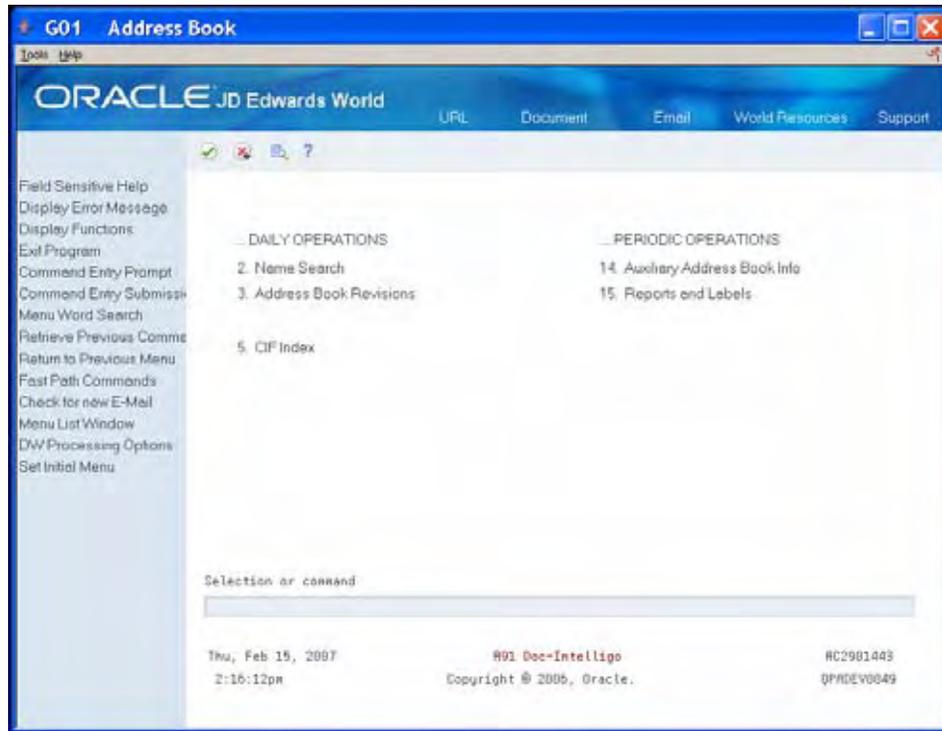
On the Master Directory



Perform one of the following:

- Click a menu option
- Enter the menu option number on the command line

The menu you select displays.



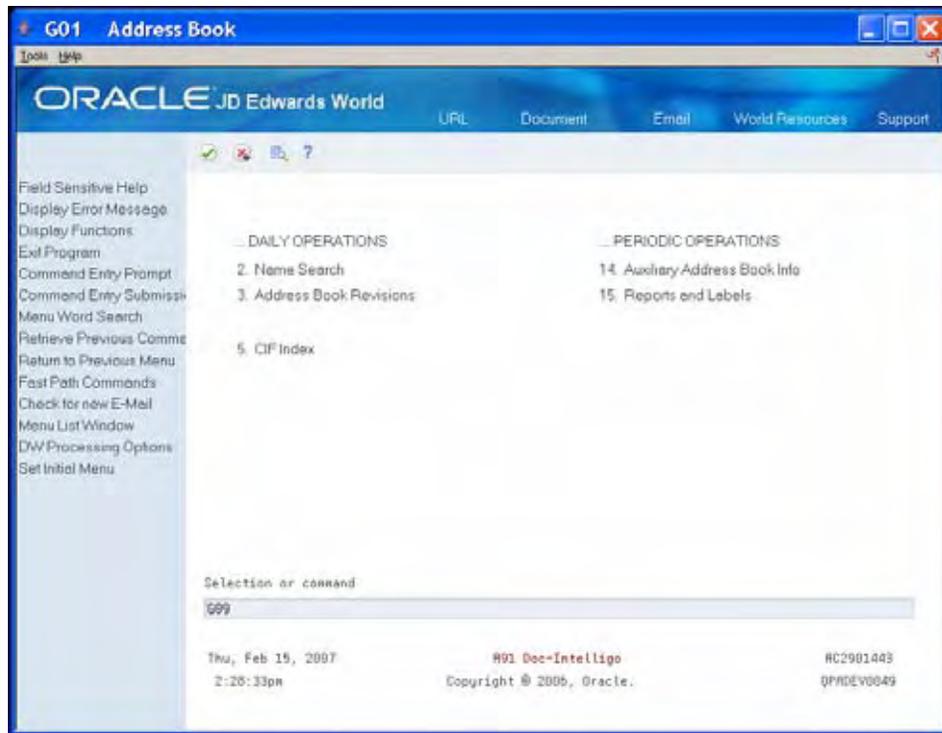
## Entering a Menu ID

A menu ID is the unique identifier associated with a particular menu. If you have menu travel authority, you can enter the menu ID on the command line.

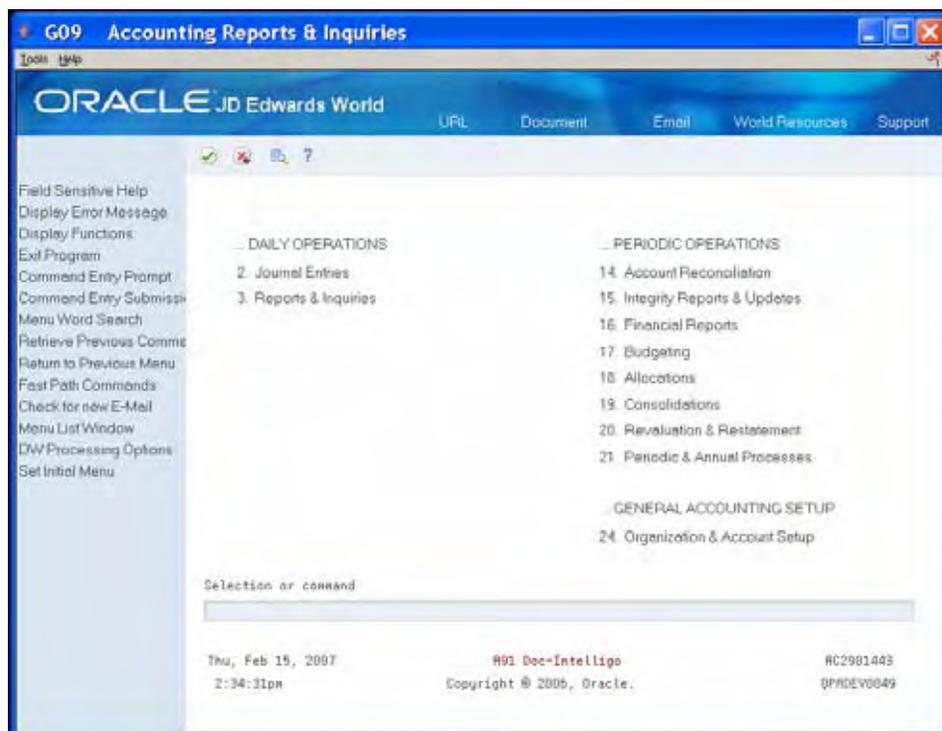
The menu ID appears in the upper-left corner of the menu of JD Edwards World software.

### To enter a menu ID

On the command line of any menu, enter the menu ID.



The menu you enter displays.



## Using Function Exits to Navigate Menus

Function exits provide easy access to related tasks within the system. You can use function exits to:

- Access related information and return to the original screen
- Exit directly to other parts of the system

Function exits are on the navigation bar. As you hover over each entry on the navigation bar, the function exit highlights, and a balloon displays with the full description of the option, including the corresponding function key number. For example, the function exit Menu Word Search is shown as Menu Word Search (F8).

Complete the following tasks using function exits:

- Search for menus
- Access the Index of Menus
- Access fast path commands
- Return to the previous menu
- Return to the master directory

### Searching for Menus

You can obtain information about any program and menu using the Menu Word Search function.

#### To search for menus

1. On any menu, perform one of the following:
  - Choose Menu Word Search (F8) and enter the search topic in the Question field.
  - Type a search topic on the command line and choose Menu Word Search (F8).

Menu Word Search appears with a list of all the menu selections that contain the key words in your search.



2. To go directly to the menu, perform one of the following:
  - Choose the menu selection and then choose Execute Menu Only from the Option menu.
  - Enter 5 next to the menu title.
3. To list the menu and selection specifications, perform one of the following:
  - Choose the menu selection and then choose Display Menu Detail from the Option menu.
  - Enter 6 in front of the menu title.
4. To display the general help instructions, perform one of the following:
  - Choose the menu selection and then choose Display Help Instructions from the Option menu.
  - Enter 7 in front of the menu title.

Field	Explanation
Question?	<p>The Menu Question field allows the entry of single or multiple words to search for menu selections and Q &amp; A Database questions. You may literally pose a question to the search to find the function and/or subject you wish to work with. As an example you may ask the question: "How do I enter vouchers" and press the enter key. A list of menu selections (or Q &amp; A Database questions) will be presented to you at which time you may execute one of the selections, simply go to the item containing the selection, view the item detail for that selection or view the help instructions for any selection. If your first question is not answered with a list of selections . . . don't give up, keep trying with different words or if you are using the plural of a word, try the singular. You may also designate generic type words by ending the word or partial word with an asterisk (*).</p>

## What You Should Know About

Word Search	Description
<b>Command Entry</b>	<p>Command Entry authority is a feature that allows you to enter commands from any menu. If you have Command Entry authority, you can enter unlimited search text on the command line.</p> <p>If you do not have access to Command Entry, your menu displays a field for selections only. You can enter up to 10 characters of your search topic and choose Menu Word Search (F8) to display the Menu Word Search window.</p> <p>Additionally, you can press F8 to display the window, type a longer search topic, and press Enter.</p>

**Using Menu Word Search on double-byte machines**

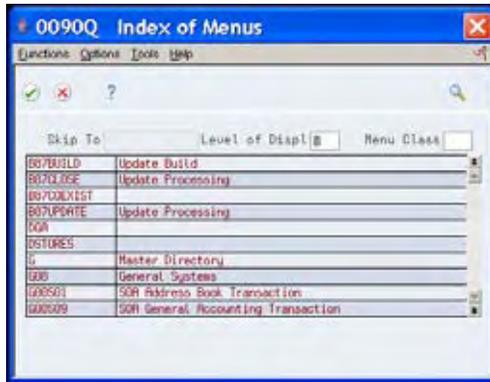
To enable the Menu Word Search function on double-byte machines for menus you add or change, you must enter single-byte text for menu titles and selections. This text must be phonetically equivalent to the corresponding double-byte text.

**Accessing the Index of Menus**

A menu ID is a unique identifier associated with a particular menu. You can list menu IDs by displaying the Index of Menus.

To access the index of menus

1. On any menu, choose Menu List Window (F16).



2. On Index of Menus, do one of the following to view the complete list of menus:
  - Click the up and down arrows
  - Complete the Skip To field
  - Use the Page Up and Page Down keys
3. To identify the menu levels to display, complete the following field:
  - Display Level
4. To identify the type of menus to display, complete the following field:
  - Menu Class
5. To choose the menu, perform one of the following:
  - Click your selection
  - Enter 4 in the field in front of your selection
6. To access technical information on the menu, perform one of the following:
  - Choose Display Menu Details from the Options menu.
  - Enter 1 in the field in front of your selection.

Field	Explanation
Display Level	<p>The Level of Display field contains a number or letter identifying the level at which menus and processing options are displayed. The levels of display are as follows:</p> <ul style="list-style-type: none"> <li>A Product Groups (e.g. Job Cost, Manufacturing)</li> <li>B Major Products (e.g. GL, AP)</li> <li>1 Basic Operations</li> <li>2 Intermediate Operations</li> <li>3 Advanced Operations</li> <li>4 Computer Operations</li> <li>5 Programmers</li> <li>6 Sr. Programmers Use F16 on any menu and skip to menu G09 (Level 9) for an illustrative example.</li> </ul>
Menu Class	<p>The menu classification indicates the type of a menu. For example: a JD Edwards World Master menu or Company Master menu.</p>
Menu Identification	<p>The menu name, which can include up to nine characters. JD Edwards World standards are:</p> <ul style="list-style-type: none"> <li>▪ Menu numbers are preceded with a G prefix.</li> <li>▪ The two characters following the prefix are the system code.</li> <li>▪ The next characters further identify the menu.</li> <li>▪ The 4th character specifies a specific skill level.</li> <li>▪ The 5th character distinguishes two menus of the same system with the same skill level.</li> </ul> <p>For example, the menu identification G0911 specifies the following:</p> <ul style="list-style-type: none"> <li>G Prefix</li> <li>09 System code</li> <li>1 Display level/skill level</li> <li>1 First menu</li> </ul>

## Accessing Fast Path Commands

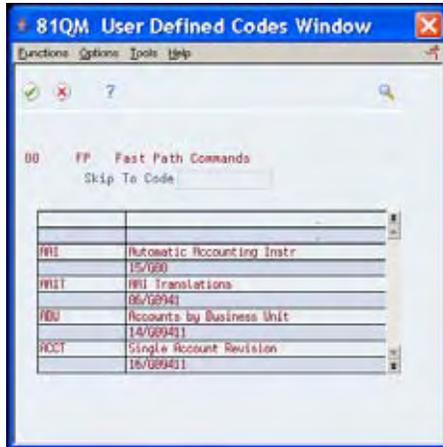
Some menus and programs have fast path names that identify them. Fast path commands are user defined codes, which are set up by your System Administrator. See *User Define Codes* for more information about user defined codes.

You can quickly move among menus and forms by using fast path commands. The system presents all fast path commands in a pop-up window so that you can select the one you want.

Depending on your security level, you may not have access to fast path commands.

## To access fast path commands

1. On any menu, perform one of the following:
  - Choose Fast Path Commands (F13).



2. On User Defined Codes Window, do one of the following to view the complete list:
  - Click the up and down arrows
  - Use the Page Up and Page Down keys
  - Complete the Skip To Code field
3. To choose the program or menu, perform one of the following:
  - Click a menu option
  - Enter 4 in the field in front of the menu option

## Returning to the Previous Menu

You can use a function exit to return to the previous menu.

### To return to the previous menu

1. On any menu, choose Return to Previous Menu (F12).
2. Continue to repeat this step to reverse your path up to 20 menus.

## Returning to the Master Directory

You can return directly to the master directory from any other menu.

## To return to the Master Directory

On any menu, press the Enter key.

## Accessing Hidden Menus

Hidden menus contain specialized selections that do not appear on other menu levels. You can access the hidden menus from any other menu for the system.

Depending on your security level, you may not have access to every Hidden Selection.

Complete the following:

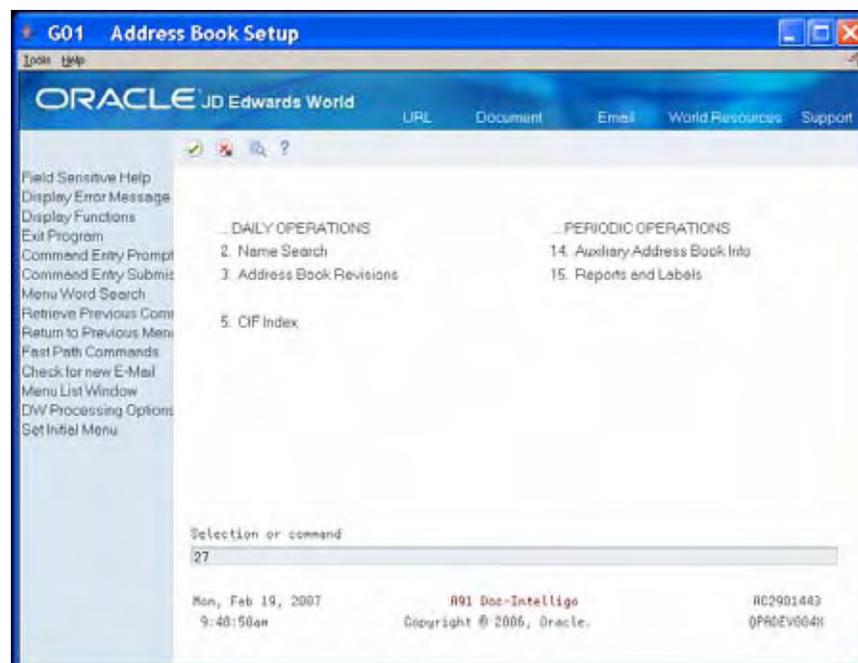
- Locate an Advanced and Technical menu
- Locate a Setup menu

## Locating an Advanced and Technical Menu

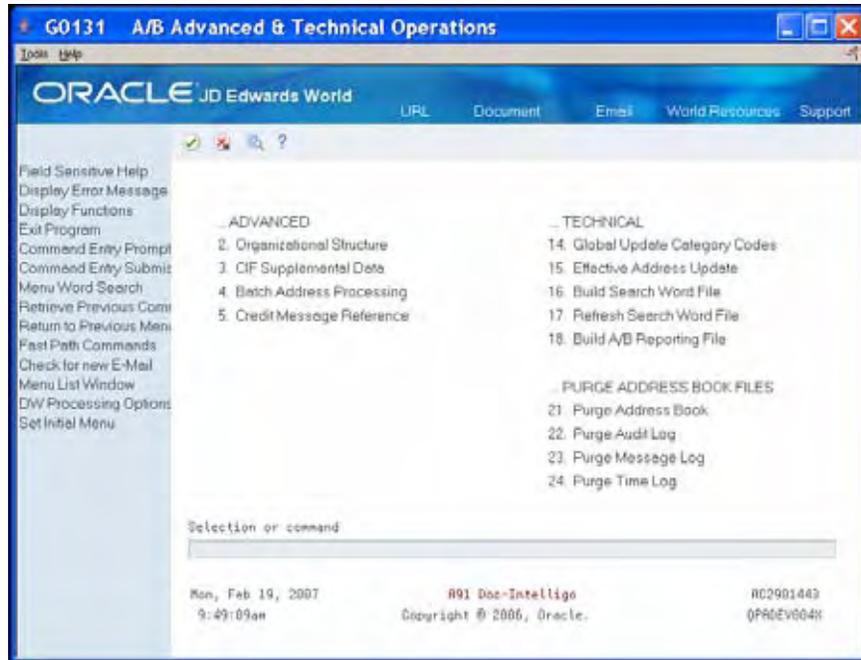
The advanced and technical menu you access depends on which menu you are on when you enter hidden selection 27.

### To locate an advanced and technical menu

On any menu, enter 27 in the command line.



The Advanced and Technical Operations menu for the system displays.

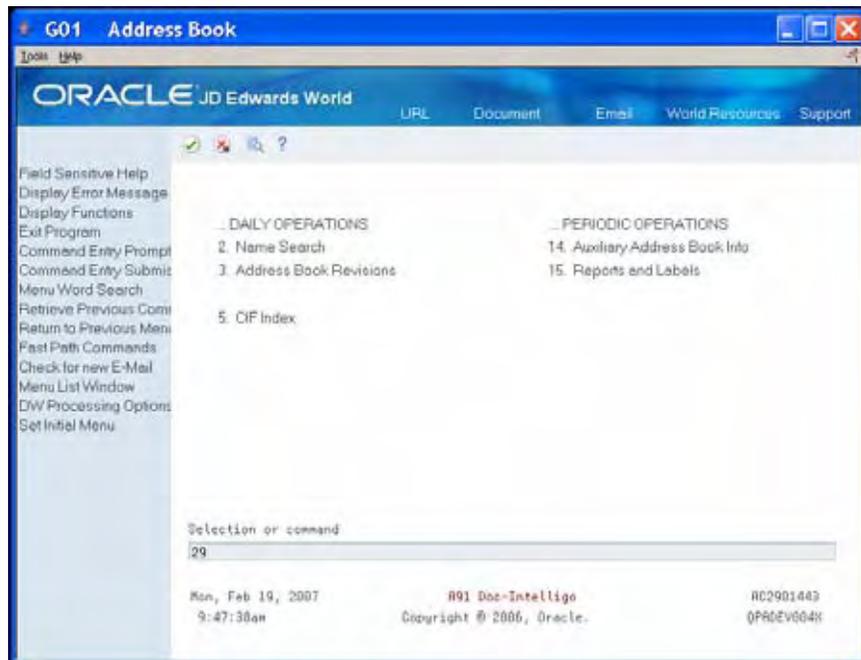


## Locating a Setup Menu

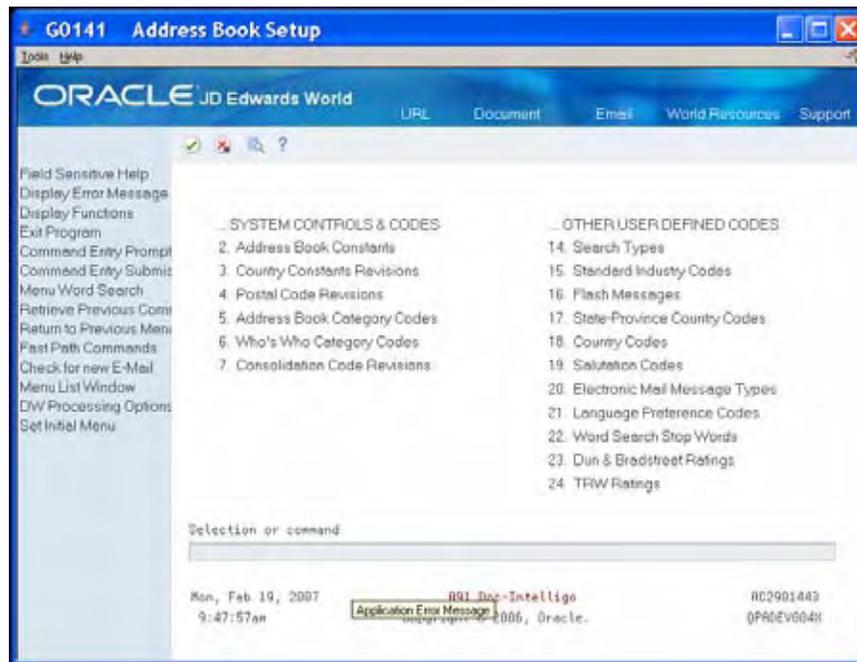
The setup menu you access depends on which menu you are on when you enter hidden selection 29.

To locate a setup menu

On any menu, enter 29 in the command line.



The Setup menu for the system appears.



## See Also

- *Working with Submitted Reports* for information on other hidden selections.



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## 4 Screens



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# Overview to Screens

## Objectives

- To become familiar with types of screens and windows
- To learn how to use menu bars on the screens
- To learn how to access screens

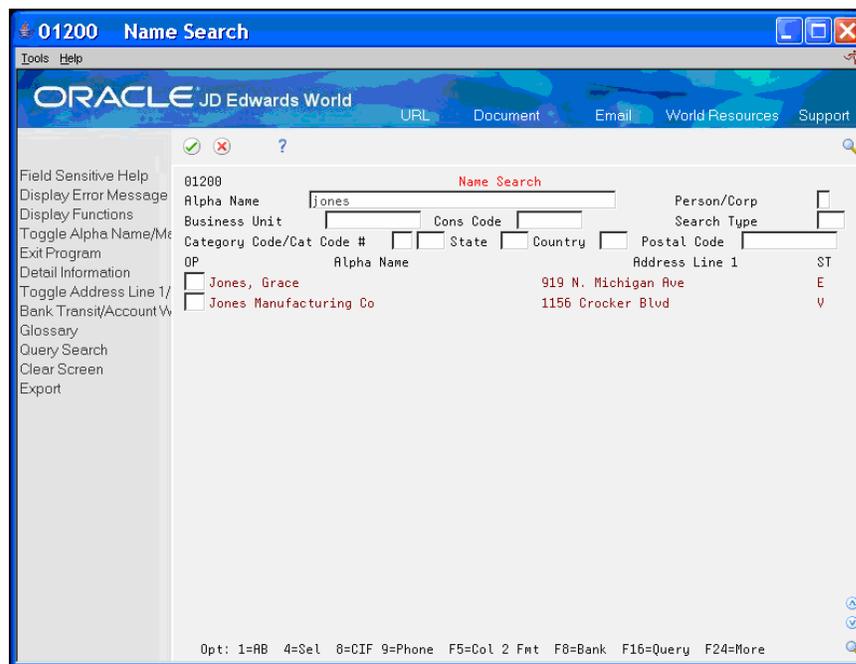
This section contains the following:

- [About Screens](#)
- [About Windows](#)

## About Screens

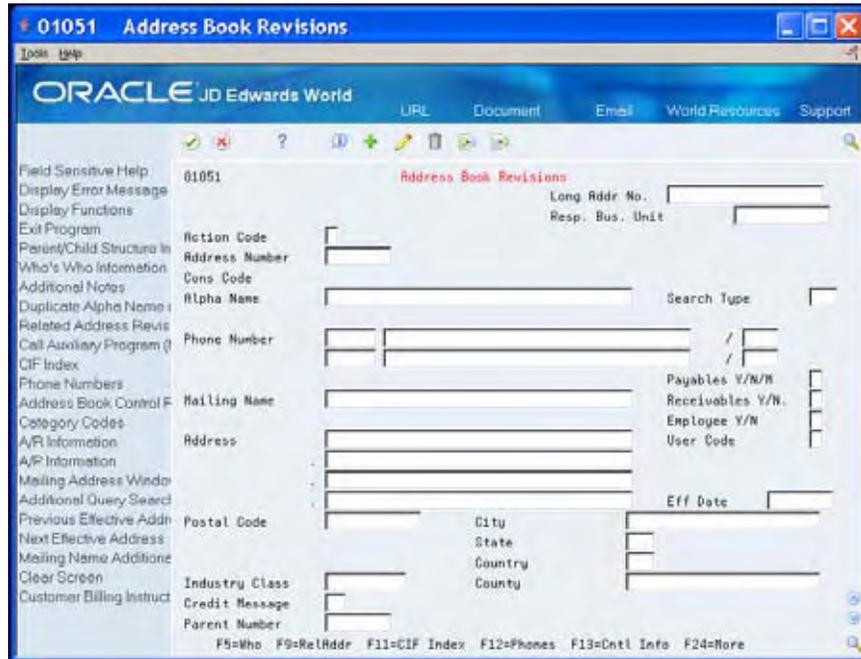
A screen is an organized arrangement of fields that contains information for a record, a process, or a report. There are several types of screens.

Inquiry screens typically allow the user to search for a particular record.



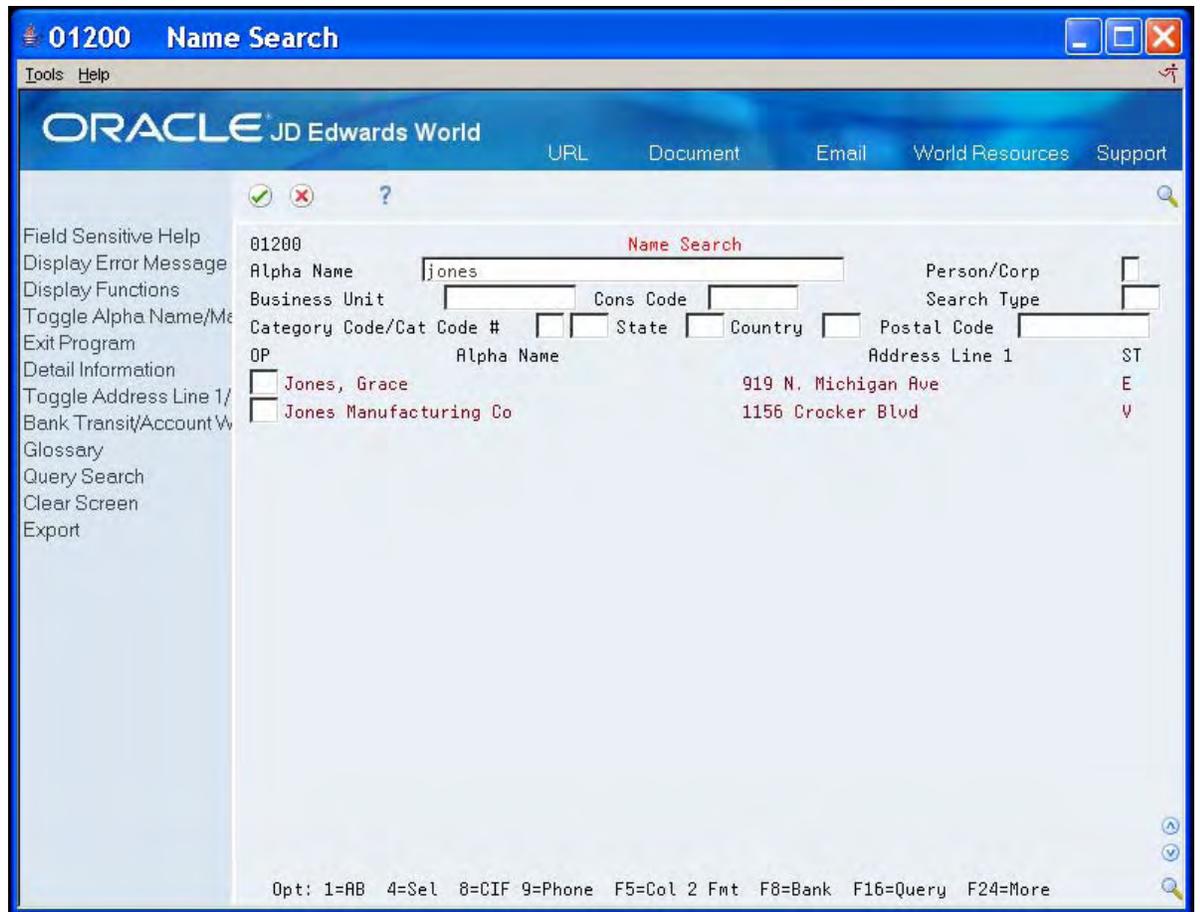
There are two types of Inquiry/Update screens. Inquiry/Update screens for a single record allow the user to locate a record and then modify the data. The user can also

add new records and change and delete existing records. For example, the Address Book Revisions screen is an Inquiry/Update screen.

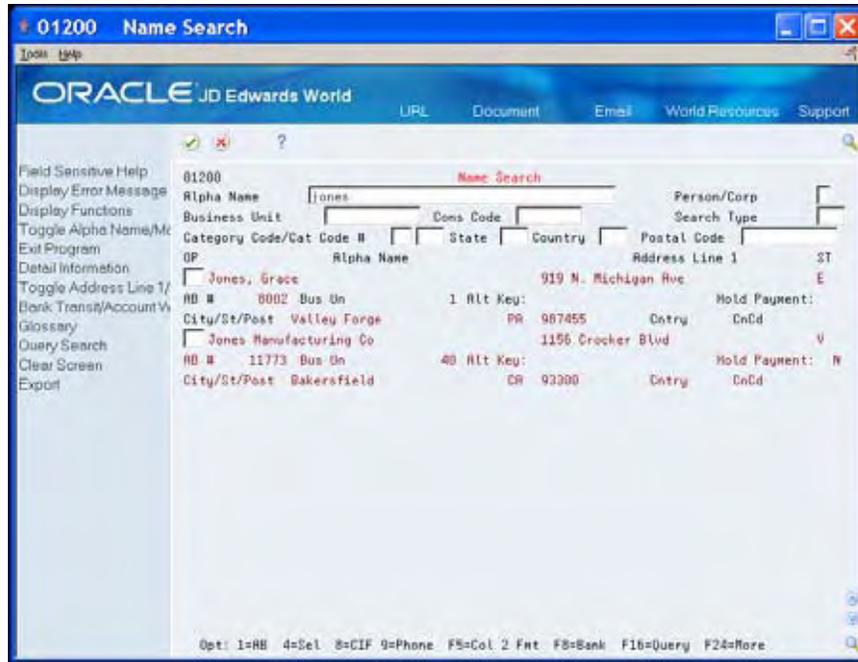


Inquiry/Update screens for multiple records allow the user to locate and modify the data for more complex transactions. Records such as Sales Orders, Purchase Orders, Work Orders, Inventory items, and so forth; include header and detail information. These typically have a block of data common to all of the detail line items; therefore this information is in the header area of the screen at the top. The header can include information, such as the Action Code field, the supplier, order dates, and so forth. The individual detail line items are in the detail area or list box in the lower area of the screen. This area might include details such as items, quantities, costs, and so forth. The combination of the information in the header and detail area make the complete transaction. You can use these screens to add new records and change and delete existing records.

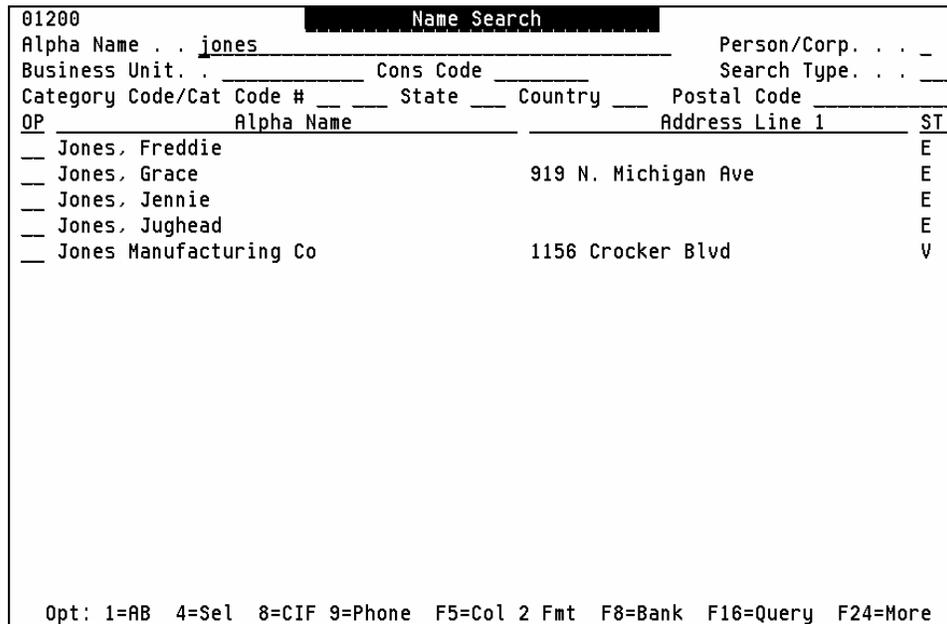




Following is an example of the detail area on a screen where you can display a large amount of related information. The opened detail area displays the information for a record with a description of the text.



The following screen is the character-based version of JD Edwards World for the previous web screen:



The detail area for the Name Search screen expands the information on the screen.

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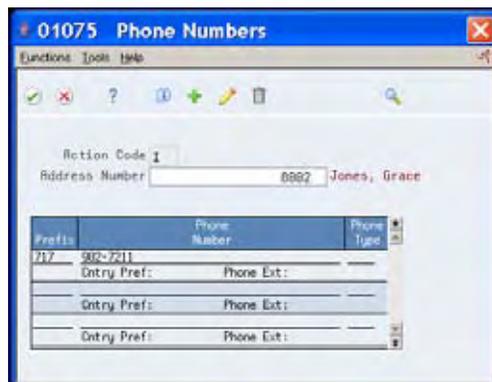
01200                               Name Search
Alpha Name . . . jones                Person/Corp. . . _
Business Unit. . .                    Cons Code          Search Type. . . _
Category Code/Cat Code # ___ State ___ Country ___ Postal Code ___
OP      Alpha Name                    Address Line 1      ST
__ Jones, Freddie                    E
AB #   4420 Bus Un                    1 Alt Key:        Hold Payment:
City/St/Post TX                      Cntry            CnCd
__ Jones, Grace                      919 N. Michigan Ave E
AB #   8002 Bus Un                    1 Alt Key:        Hold Payment:
City/St/Post Valley Forge PA 987455 Cntry            CnCd
__ Jones, Jennie                    E
AB #   4401 Bus Un                    1 Alt Key:        Hold Payment:
City/St/Post CA                      Cntry            CnCd
__ Jones, Jughead                    E
AB #   2955 Bus Un                    1 Alt Key:        Hold Payment:
City/St/Post CO                      Cntry            CnCd
__ Jones Manufacturing Co            1156 Crocker Blvd V
AB #   11773 Bus Un                    40 Alt Key:       Hold Payment: N
City/St/Post Bakersfield CA 93300 Cntry            CnCd

Opt: 1=AB 4=Sel 8=CIF 9=Phone F5=Col 2 Fmt F8=Bank F16=Query F24=More
    
```

## About Windows

A window displays a greater level of detail related to the primary information that displays on the screen. There is no navigation bar on the left side of the window. All of the exits are on the Functions menu. If the window contains a list box, options are available from the Options menu.

For example, Phone Numbers is an example of a window.



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# Use the Context Sensitive Menu on a Screen

## Using the Context Sensitive Menu on a Screen

Context sensitive menus on screens function the same as context sensitive menus on a menu, although the menu options might be different. Each menu offers various options that you might need to perform or provides additional information on the screen. The following is an example of a context sensitive menu on a screen:

As you navigate through screens, the menu options change to reflect options available on the current screen. If you have an application with a list box, menu options are located either under the context sensitive menu area (right-click on list box row displays an options drop down) or as an option column (available on the list box used for the multi-select functionality).

Functions Options Tools Help

The following table lists some options available for the context sensitive menu.

Option	Description
Functions	Change according to available functions of current screen (Functions might or might not display, based on the current screen)
Options	Change according to available options of current screen (Options might or might not display, based on the current screen)
Tools	Attention Program System Request Display Messages
Help	General Help Product Information



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# Access Programs and Screens

## Accessing Programs and Screens

All programs are listed on menus. Choose the appropriate menu selection to access the screen. You can use function exits to access a screen just as you would to access a menu. For example, use the same functions for a screen as for a menu to access Menu Word Search and fast path commands. Keep in mind the following screen-specific information when you access screens and programs:

Screen-specific information	Description
Access Menu Word Search	<p>Choose Menu Word Search (F8) to display the Menu Word Search window and enter the search words, screen name, or program number in the Question field.</p> <p>Type the complete screen name and choose Menu Word Search (F8).</p> <p>Type the program number (for example, P05051 for Address Book Revisions) and choose Menu Word Search (F8).</p>
Access a Screen from Menu Word Search	<p>Perform one of the following to move directly to a screen:</p> <ul style="list-style-type: none"><li>▪ Double-click your selection</li><li>▪ With your selection highlighted, choose Execute Selection from the Options menu.</li><li>▪ Enter 4 in the field in front of your selection</li></ul> <p>Perform one of the following to move to the menu where a screen is listed:</p> <ul style="list-style-type: none"><li>▪ With your selection highlighted, choose Execute Menu Only from the Options menu.</li><li>▪ Enter 5 in the field in front of your selection</li></ul>
Enter the Fast Path Command	<p>If you know the fast path command name for the program you want, enter it in any command line. The system accesses the program.</p>

## What You Should Know About

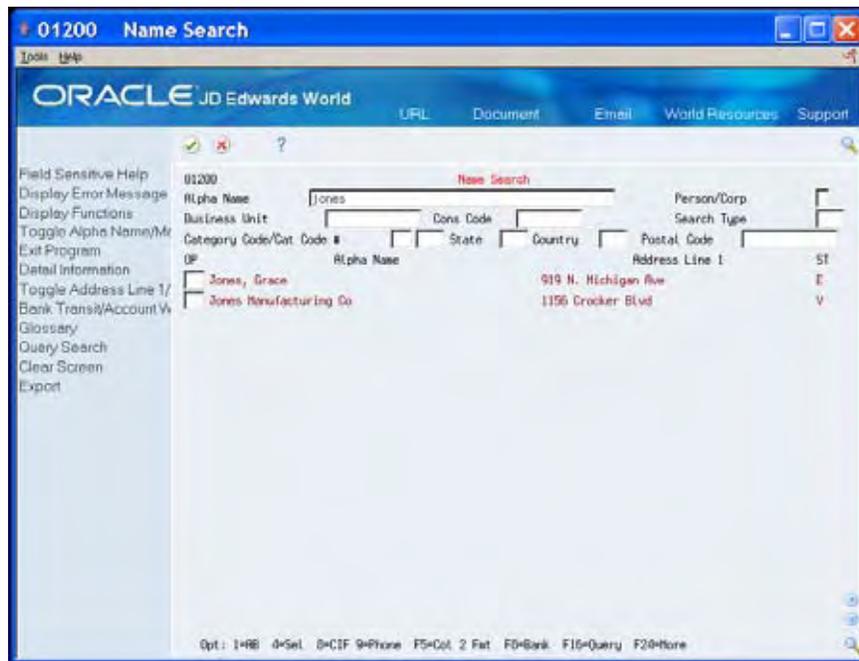
Exiting the Screen	Description
<b>Returning to previous screens</b>	To return to a previous screen, click Exit (F3). You can repeat this action until you return to a menu. <b>CAUTION:</b> When you perform this function, you lose any unsaved entries you made on the screen.

## Accessing Screen Detail and Other Screens

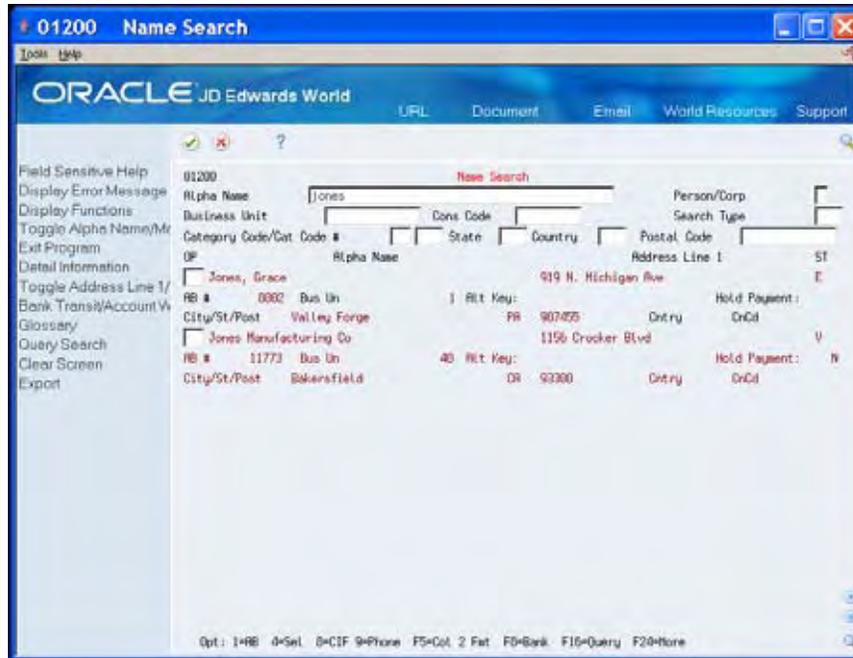
Some screens have additional information in the detail area. You choose Detail Information to access the detail area. Many screens allow you to use function exits for direct access to other screens or programs.

### To access screen detail and other screens

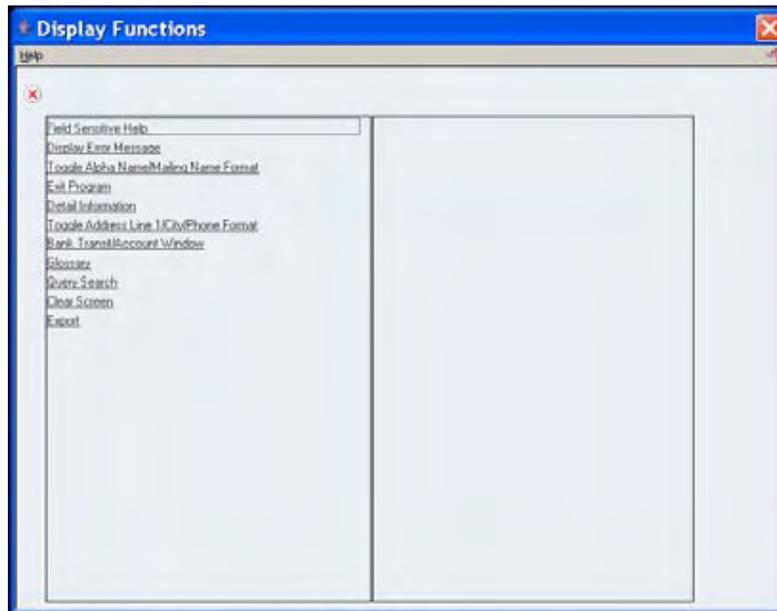
On any screen with a detail area:



1. Choose Detail Information (F4) to access the detail area.



2. Choose Display Functions (F24) to display a list of functions including other screens you can access.



3. On Display Functions, perform one of the following:
  - Click the function you want to access
  - Exit the Display Functions window and choose a function exit



## What You Should Know About

Functions	Description
<b>Closing the detail area</b>	When the detail area is open, choose Detail Information (F4) to close the detail area.
<b>Choosing functions from the context sensitive menu</b>	You can also choose the options from the Functions menu on the context sensitive menu.  See also <i>Use the Context Sensitive Menu on a Screen</i> .
<b>Direct access</b>	If you know the correct function key you press to access the screen, press that function key to access the screen.

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## **5 Interactive and Batch Jobs**



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# Overview to Interactive and Batch Jobs

## Objectives

- To understand the differences between interactive and batch processing.

## About Interactive and Batch Jobs

Most interactive and batch programs have processing options associated with them. Processing options allow you to determine the specifications of a program or report version.

The batch job runs independently of your interactive job. When you submit a batch job, you can continue working on your computer without waiting for the system to process the job.

### What Is an Interactive Job?

An interactive job starts when you sign on to the system and ends when you sign off the system. During the job, you interact with the system. You enter requests and the system acts on each request. For example, when you choose an option or enter a command, the system reacts to each entry and then moves on to the next to create a sequence of events.

### What Is a Batch Job?

A batch job consists of a predefined group of processing actions that require little or no interaction between you and the system. When you submit the batch job, the job enters a job queue where it waits until the system is ready to process the job. The system begins processing the job when it takes the job from the job queue. A batch job is put in a job queue by:

- Choosing a menu option that submits a batch job
- Submitting a job into the system using the SBMJOB command

A job queue might contain many jobs waiting for the system to process them. Your job waits while the system processes other jobs that other users submit prior to your job or have a higher priority. When system resources are available, the system processes your job.



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# Work with Interactive and Batch Jobs

## Working with Interactive and Batch Jobs

When you begin to work with a new system, you might not be familiar with all of the programs. You can use alternate menu formats to display menu specifications, which are predefined titles for menus and programs. These titles differentiate interactive and batch jobs and help you communicate with the system during version processing. Additionally, you might need to view or change the processing options for interactive, batch, and report programs.

Complete the following tasks:

- [Viewing Menu Specifications](#)
- [Changing Processing Options for Interactive Jobs](#)

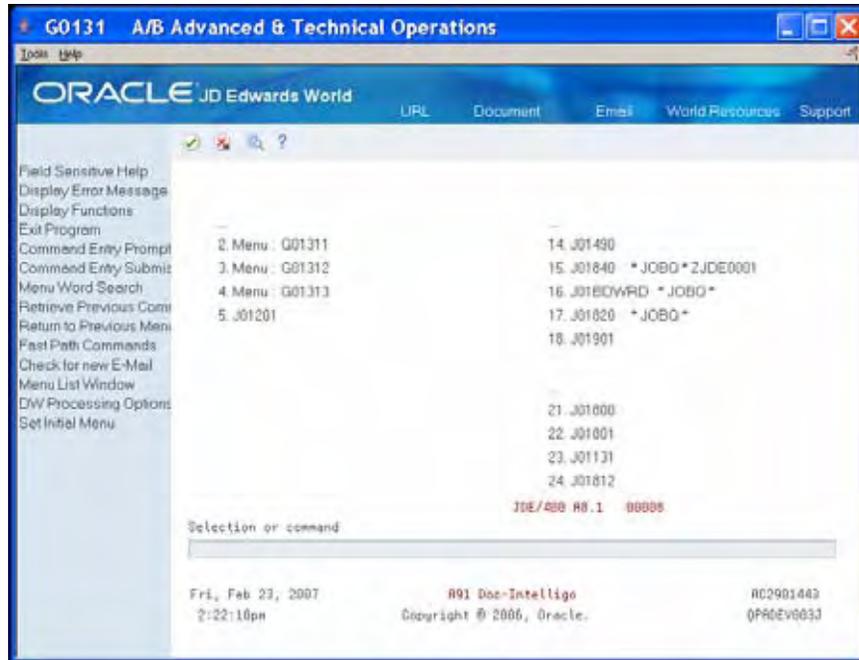
## Viewing Menu Specifications

You can determine interactive and batch jobs by using JD Edwards World menu specifications. Hidden Selection 25 displays the specifications for any menu.

### To view menu specifications

On any menu, enter 25 in the command line.

The menu format changes to display the menu and program numbers instead of the selection names.



The following table details the additional information this format provides:

Menu Items	Description
Menus	Selections 2 - 4 access menus. All menu titles begin with the letter G.
Interactive programs	Selection 5.
Reports and other batch jobs	For example: selections 15 - 17. Jobs you submit to batch display the term *JOBQ* after the title. A job you send directly to batch is a "blind" DREAM Writer version. ZJDE0001, as shown on selection 15, indicates the DREAM Writer version that executes when you make this selection.

## Changing Processing Options for Interactive Jobs

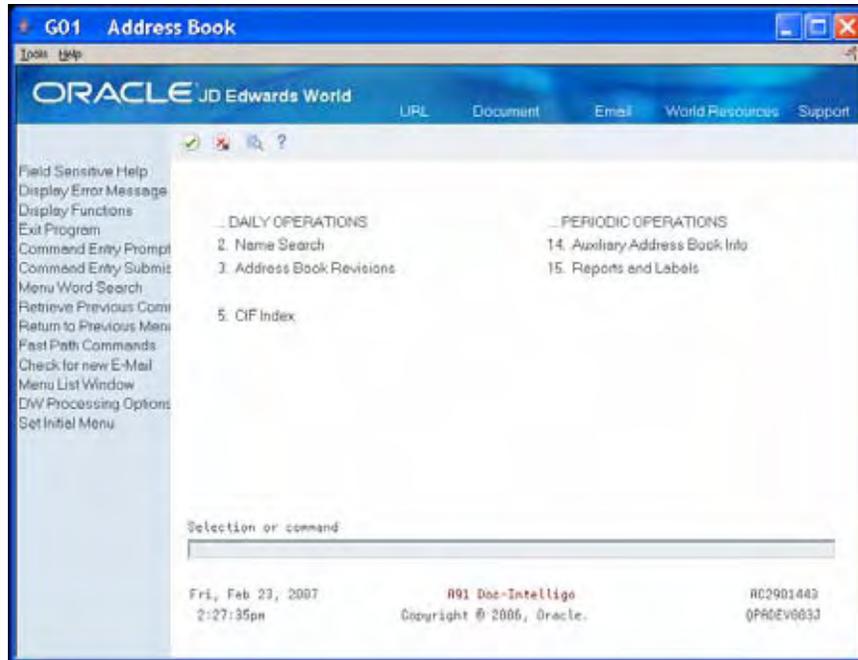
Most interactive programs have processing options associated with them. Processing options do the following:

- Control which fields appear on the data entry screen
- Control how the program processes data
- Sets up certain default values for entry

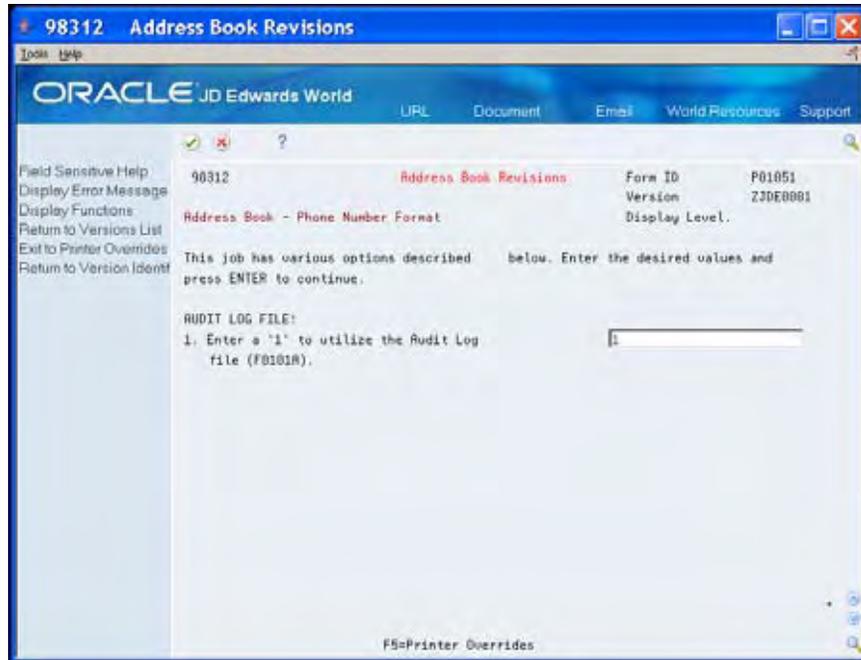
Modify the processing options to suit your personal business needs.

## To change processing options for interactive jobs

Following is an example of how you access and change processing options using the Address Book main menu.



1. Perform one of the following:
  - Hover over the Address Book Revisions menu selection, right click and choose Processing Options.
  - Type the menu selection number for Address Book Revisions in the command line and choose DW – Processing Options (F18).



How you set the processing options affects the program for data entry or processing purposes.

2. Enter the appropriate changes to all the processing options.  
Any changes you make in processing options affect all users.

## See Also

- *Revising Processing Options*

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## 6 Help Information



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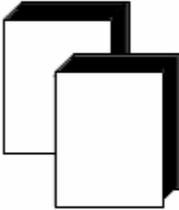
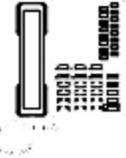
# Overview to Help Information

## Objectives

- To understand what types of help information are available
- To understand how to use the different types of help information

## About Help Information

There are several sources of help information for JD Edwards World software:

	<b>Online Help</b> Documentation is available online for every program and every field. Online information corresponds to information that appears in J. D. Edwards guides.
	<b>Guides</b> Single source information is from online help and guides
	<b>Global Support Center</b> After you have tried all other sources of help, call the J.D. Edwards World Global Support Center.

To become familiar with help information, complete the following:

- Locate program-level help instructions
- Locate field level help instructions
- Contact Global Support Center



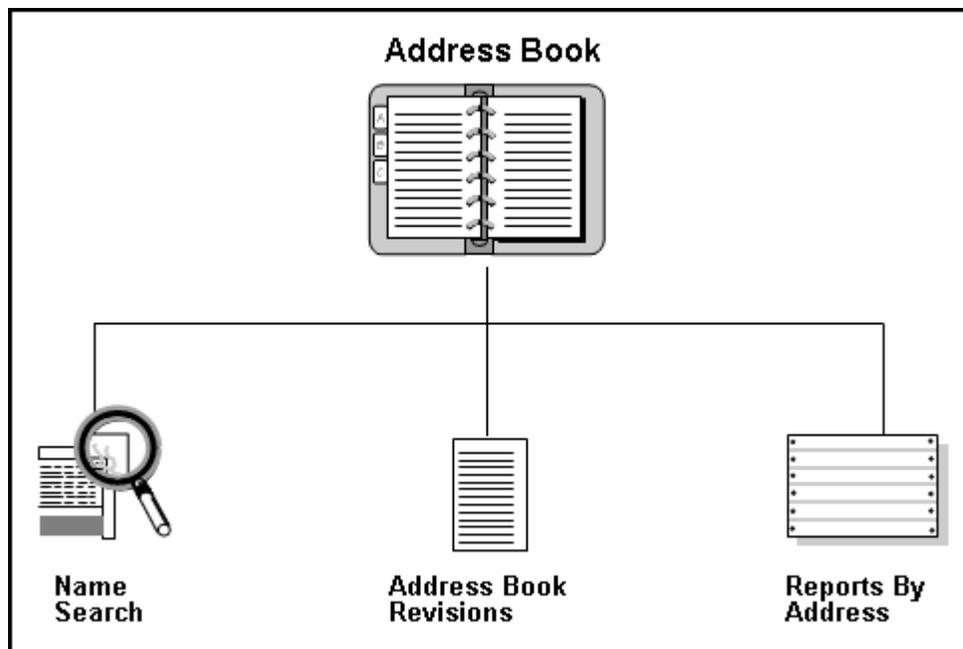
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# Locate Program-Level Help Instructions

## What Is Program-Level Help?

Program-level help instructions are available online to provide you with detailed task information you can use in resolving issues while working with a program. The following graphic uses the Address Book system as an example of the different areas where you can access program-level help.



When you choose Help, a Help Task List appears in a window. The window displays a list of tasks that relate to the program. From the Help Task List window, access:

- Any help you have defined for the program
- The DREAM Writer version to print a range of help instructions
- The user defined text associated with a task
- The input and output files
- The source code (if source code exists)
- The program notes

Complete the following tasks:

- [Access program-level help](#)
- [Display user defined instructions](#)
- [Add user defined text](#)
- [Print program-level help instructions](#)

## Accessing Program-Level Help

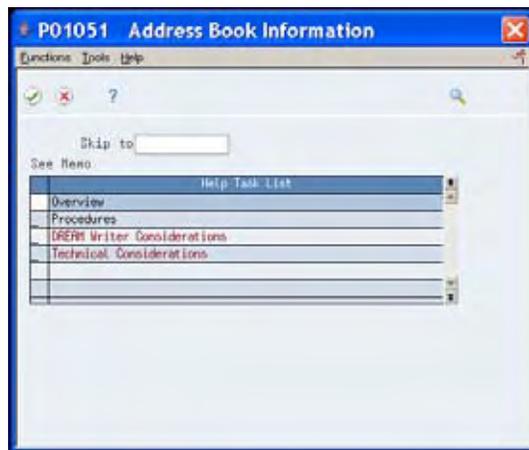
You can access the online help text for a program with any of the following methods:

- Accessing Program-Level Help
- Displaying User Defined Instructions
- Adding User Defined Text
- Printing Program-Level Help Instructions

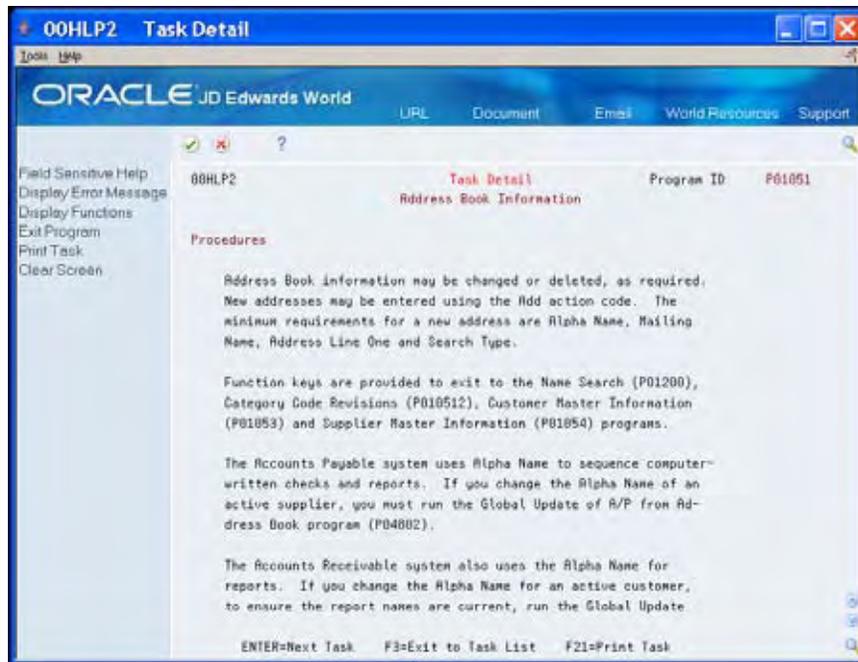
### To access program-level help from a menu

1. From any menu with a list of programs, perform one of the following:
  - Hover over the selection, right click and choose Help and then Application Help.
  - On the command line, enter Help *XX* (where *XX* represents a menu selection number)

The help task list for the selection appears.



2. To view help topics, enter 1 in front of the help topics you want to view.



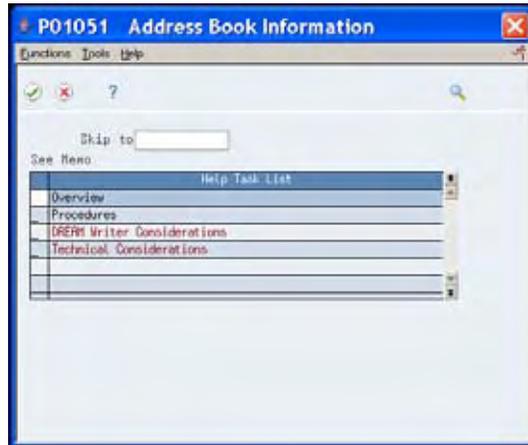
3. On Task Detail, perform one of the following to scroll through the information for a specific topic:
  - Use the Page Up and Page Down keys
  - Click the up and down arrows
4. Click Enter to go to the next help topic.

## What You Should Know About

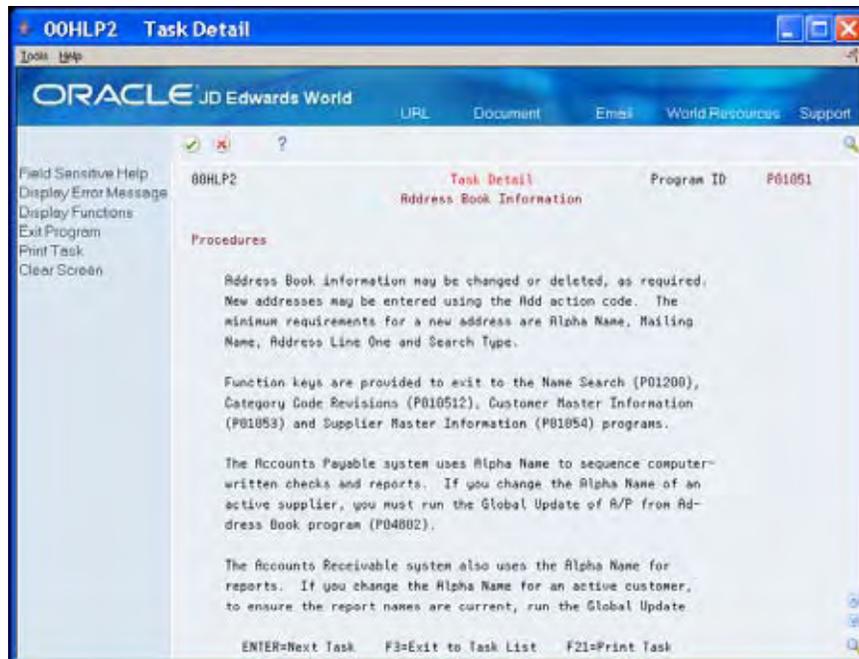
Online Help	Description
<b>Enlarging Help Task List</b>	Choose Toggle Full/Half Screen (F2) from the Functions menu to enlarge the Help Task List display and view all of the text if a line has been truncated.
<b>Using the Skip To field to access program-level help</b>	Enter the program number in the Skip To field to access the help task list for that program..
<b>Displaying Source Code</b>	On any Help Task List, choose Source Code (F10) from the Functions menu to display the source code. The source code is the programming code for a program.
<b>Listing Input/Output Files</b>	On any Help Task List, choose Input and Output Files (F15) to access the Cross Reference screen for a list all of the files defined by a program.
<b>Displaying Menu Control</b>	On any menu, click Help to display the Menu Control window with help instructions.

## To access program-level help from a screen

1. From any screen, perform one of the following:
  - Click Help
  - Press the Scroll Lock key on a PC keyboard
  - Choose General Help from the Help menu



2. On the Help Task List, enter 1 in front of the help topics you want to view.  
The help task list displays with the first help topic you select.

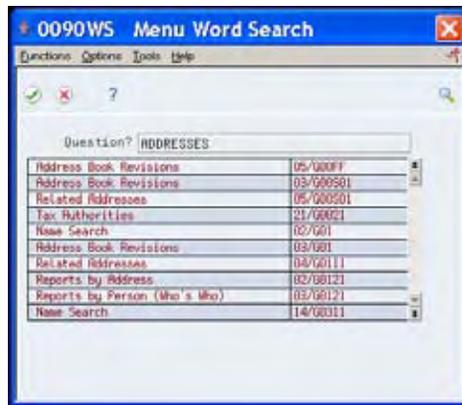


3. Perform one of the following to scroll through the information for a specific topic.
  - Use the Page Up and Page Down keys
  - Click the up and down arrows
4. Choose Enter to go to the next help topic.

### To access program-level help from Menu Word Search

1. From any menu, choose Menu Word Search (F8).
2. On Menu Word Search, enter a topic in the following field:
  - Question

The topics that meet your search criteria display in the window.



3. To review the help, select a topic and choose Display Help Instructions from the Options menu.

The Help Task List displays.

## What You Should Know About

Word Search	Description
<b>Accessing a search window from Help Task List</b>	Choose Word Help Search (F8) from the Functions menu on Help Task List to display a search window. Enter search criteria to display information for a specific question or program.

## See Also

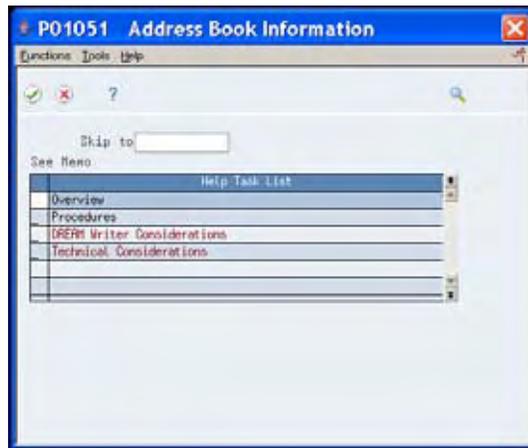
- *Accessing Programs and Screens* for additional information on using Menu Word Search.

## Displaying User Defined Instructions

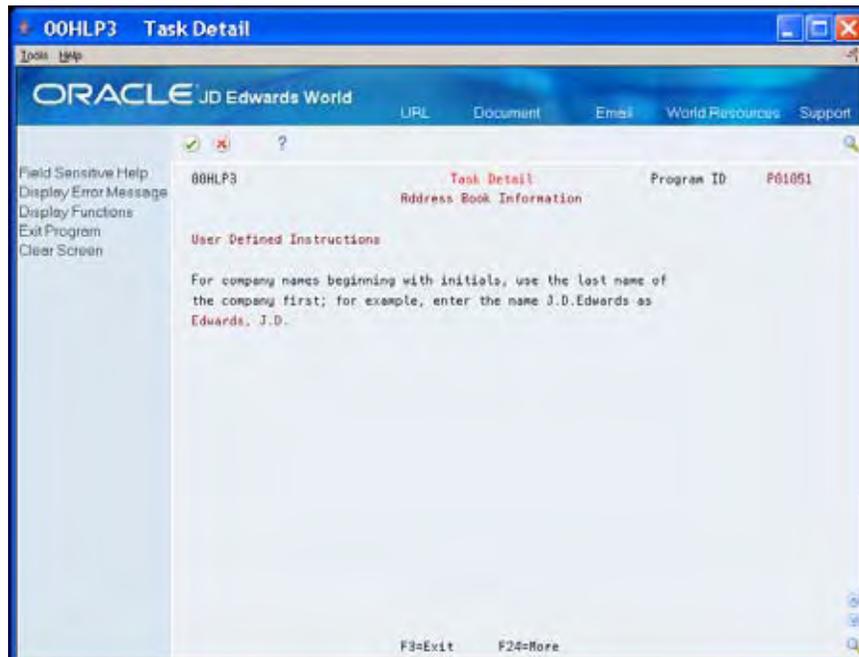
If you have written your own instructions using the User Defined Instructions function, “See Memo” appears below the Skip To field. The instructions you create are specific to your company or job responsibilities. User Defined Instructions are available in many JD Edwards World applications.

### To display user defined instructions

On any Help Task List, choose User Defined Instructions (F5) from the Functions menu to display the help topics.



The user defined help topics display.



## Adding User Defined Text

You can add your own text for any topic that appears in the Task List window. For example, you might want to attach electronic notes to explain brief details about the task.

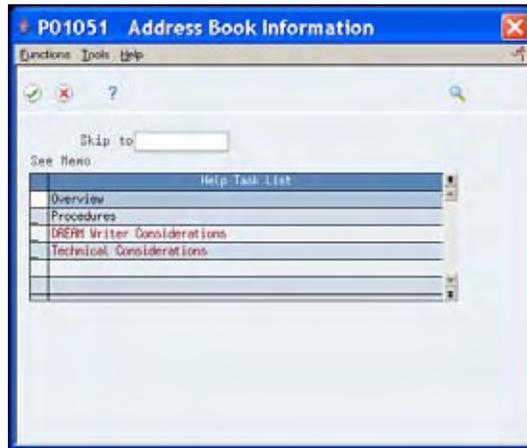
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**Caution:** Anyone can access and add, change and delete any user defined text that you attach to an item on a help task list.

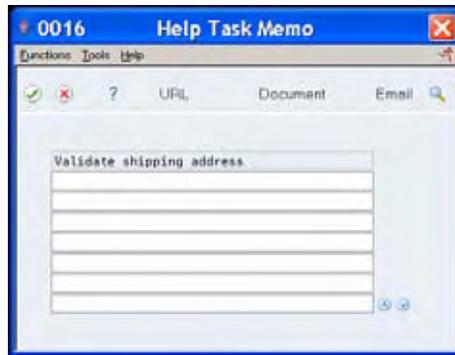
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### To add user defined List text

1. On any Help Task List, choose the item for which you want to add text.



2. Choose User Defined Text (F14) from the Functions menu to access the Help Task Memo screen.



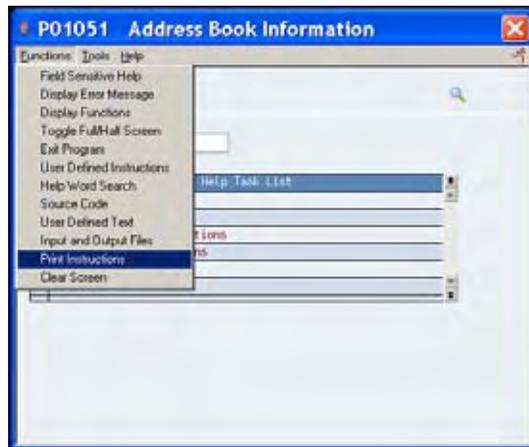
3. Type the text and click Enter.  
A successful memo entry highlights the line of text.
4. Click Exit (F3).  
The system highlights the line and displays “See Memo” in the Help Task List window to indicate that a memo exists for the item.

## Printing Program-Level Help Instructions

If you infrequently use a certain program feature, it is useful to have a printed copy of help instructions on hand for quick reference. The Help Task List window features a print option for specific tasks.

### To print program-level help instructions

On any Help Task List choose the item you want to print and choose Print Instructions (F21) from the Functions menu.



The Version Selection screen displays.

## What You Should Know About

Help Instructions	Description
<b>Printers</b>	Help Instructions can be printed on either a standard AS/400 dot-matrix printer or a laser printer.
<b>DREAM Writer versions</b>	You can access the Instruction screen for a list of versions by selecting Instructions from the Documentation Services menu (G91).  See also <i>Creating a Version</i> for additional information on DREAM Writer version processing

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# Locate Field Level Help

## What Is Field Level Help?

Field level help contains information related to a specific field. Depending on the particular field, the system displays one of the following types of field level help:

- Search window
- List of valid values
- Field explanation

To understand field level help, complete the following tasks:

- [Accessing Field Level Help](#)
- [Accessing Name Search from the Address Number Field](#)
- [Displaying Valid Values](#)
- [Displaying Field Explanation Help](#)

## Accessing Field Level Help

You can access field level help from any field on any screen.

### To access field level help

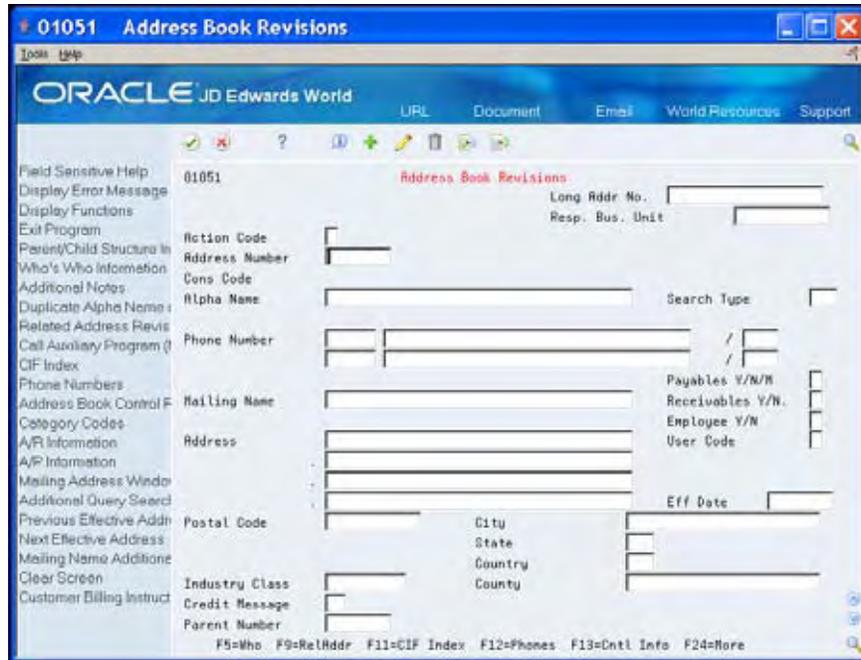
On any screen, position the cursor in any field and choose Field Sensitive Help (F1).

## Accessing Name Search from the Address Number Field

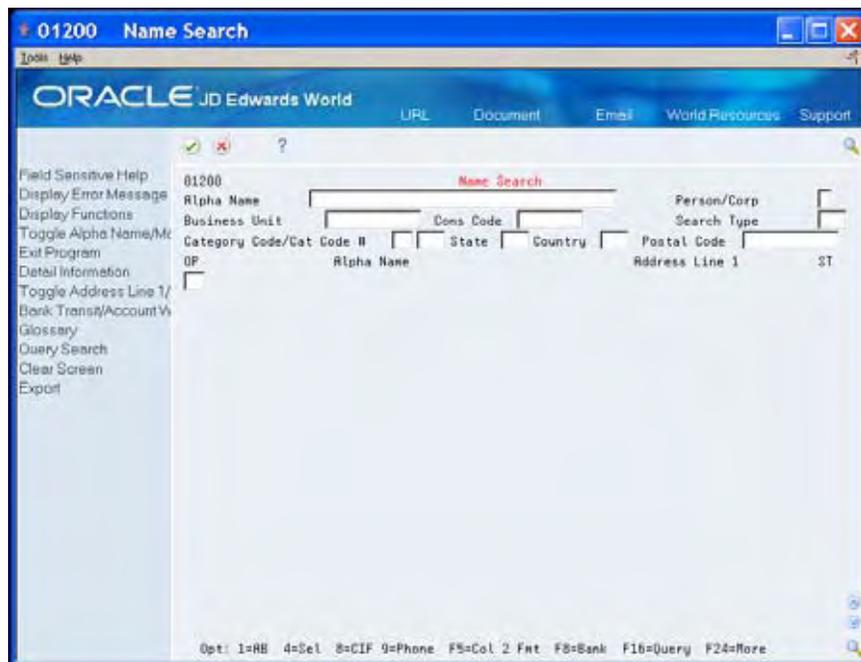
The Name Search window provides access to the files in Address Book. If you do not know an address number, search the Address Book database for the appropriate record.

## To access Name Search from a field

On any screen with the Address Number field, place the cursor in the Address Number field, and choose Field Sensitive Help (F1).



Name Search displays.



## Displaying Valid Values

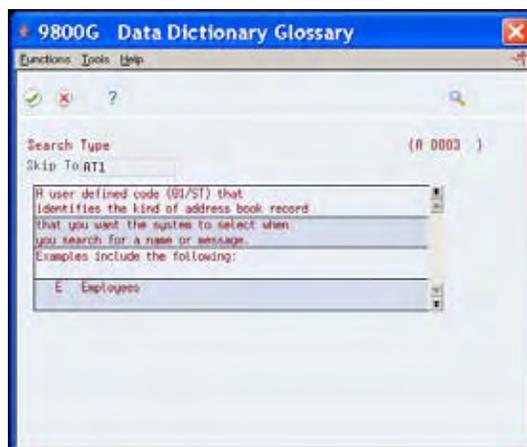
Some fields accept only valid values or user defined codes. The User Defined Codes window lists the valid values available for a particular field.

### To display valid values

1. On Address Book Revisions, place the cursor in the following field:
  - Search Type
2. Choose Field Sensitive Help (F1).



3. On User Defined Codes Window, to select a specific value, perform one of the following:
  - Double-click a line
  - Select the line and then choose Select/Work with from the Options menu.
4. To display the field explanation, choose Show Field's Glossary (F9).  
Data Dictionary Glossary displays.

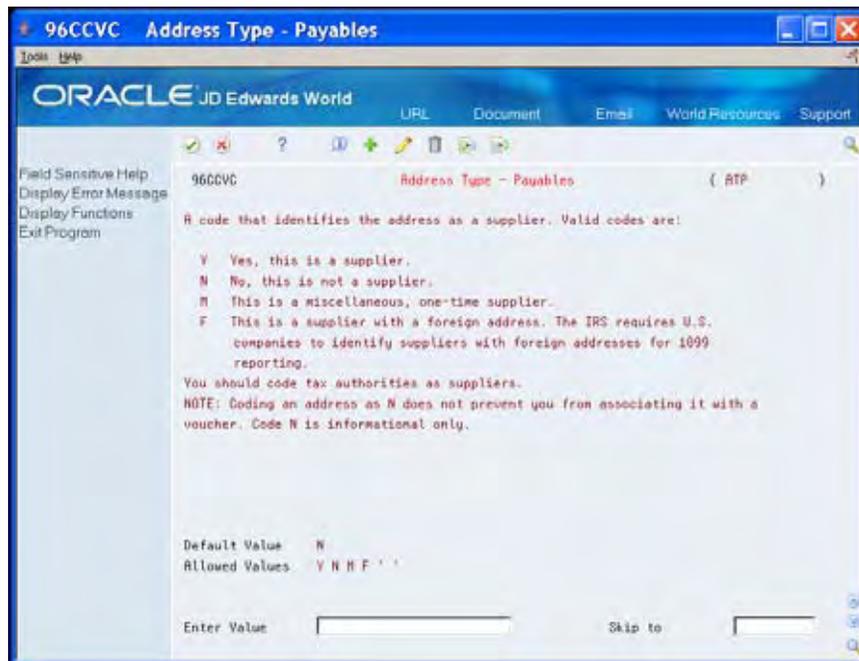


## Displaying Field Explanation Help

The field explanation is generic unless screen, program, and system specific information exists. Screen and program specific information appear after either a generic or a system specific field explanation if it is available. Following is an example of field explanation help for the Payables Y/N/M field.

### To display field explanation help

1. On Address Book Revisions, place the cursor in the following field:
  - Payables Y/N/M
2. Perform one of the following:
  - Click the Prompt for valid field values icon
  - Choose Field Sensitive Help (F1)



On Address Type - Payables, to enter a specific value in the Payables Y/N/M field on Address Book Revisions, you can enter a valid value in the Enter Value field.

## What You Should Know About

Help Information	Description
<b>Displaying Error Messages</b>	If at any time an error is made while entering information into a field, choose Displaying Error Message (F7) to display a description of the error.

Help Information	Description
<b>Printing Field Information</b>	<ul style="list-style-type: none"><li data-bbox="776 254 1382 342">▪ To print information about a specific screen, choose Video Illustrations from the Documentation Services menu (G91).</li><li data-bbox="776 359 1382 447">▪ To print information about all fields in a system, choose Glossary of Terms from the Documentation Services menu (G91).</li></ul>

## See Also

- *Working with User Defined Codes*



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## 7 Records



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# Overview to Records

## Objectives

- To understand how to manage records

## About Records

A record is a collection of related, consecutive fields of data that the system treats as a single unit of information. The system differentiates each record with a unique number. When you know the number of the record, you can directly access that particular record. A query program allows you to search the system for a specific record when you do not know the number of the record.

Complete the following:

- Search for an Address Book record
- Work with a record



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# Search for an Address Book Record

## Searching for an Address Book Record

All systems use the Address Book to set up information such as locations, employees, supplier, or customers.

There are several methods you can use to locate a record in the Address Book when you do not know the unique record number. Depending on how much you know about a record, you can enter varying levels of information to perform a search.

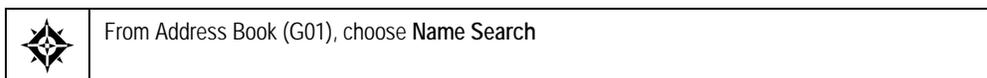
Complete the following:

- [Accessing Name Search](#)
- [Entering search criteria](#)
- [Using Query Search](#)
- [Using wildcard search](#)

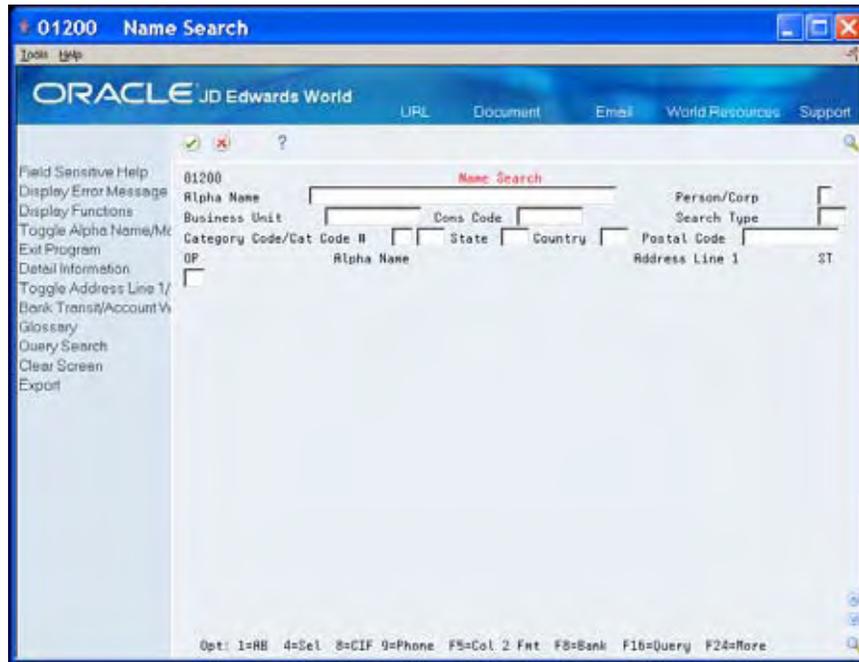
## Accessing Name Search

To locate a record in the Address Book system, start your search from the Name Search screen.

To access Name Search



Name Search displays.



## See Also

- *Accessing Name Search from a Field*

## Entering Search Criteria

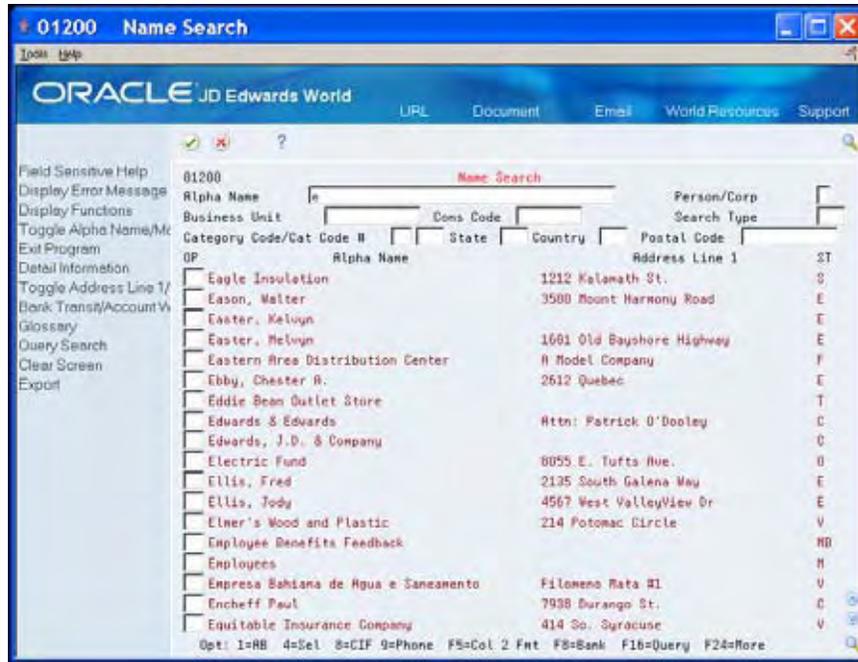
You can enter a whole word or only one letter to search for a record. The system searches for all the records with an alpha name that begin with the letters you enter.

### To enter search criteria

On Name Search, complete one or more of the following fields:

- Alpha Name
- Person/Corporation
- Business Unit
- Cons Code
- Search Type
- Category Code/Cat Code #
- State
- Country
- Postal Code

Any names that initiate with your search criteria display. In the following example, all of the names that begin with the letter E display.



Field	Explanation
Alpha Name	<p>The compressed description contains the alpha name without spaces, slashes, dashes, commas, and other special characters. The compressed description is the field used in the Name Search.</p> <p style="text-align: center;"><i>Screen-specific information</i></p> <p>The description contains the alpha name without spaces, slashes, dashes, commas, and other special characters. The description is the field used in the Name Search.</p>
Person/Corp	<p>You can limit your selection to Address Book records for persons or non person entities.</p> <p>1 Include only those address book records for persons.</p> <p>2 Include only those address book records for non person entities.</p> <p>blank Include both.</p>

Field	Explanation
Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Cons (consolidation) Code	<p>This is a code that allows you to group together Address Book Numbers that are all part of one greater entity. For example, a chain of grocery stores where each store has been set up as a different Address Book Number but they are all owned by one Corporation. This code will appear on vouchers and invoices allowing you to review and report on activity for the entire group.</p>
Search Type	<p>A user defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example:</p> <ul style="list-style-type: none"> <li>E Employees</li> <li>X Ex-employees</li> <li>V Suppliers</li> <li>C Customers</li> <li>P Prospects</li> <li>M Mail distribution lists</li> </ul> <p style="text-align: center;"><i>Screen-specific information</i></p> <p>Placing security on search types might restrict you from viewing certain records. When security is active, a code is required in this field.</p>

Field	Explanation
Category Code/Cat Code #	<p>Up to ten 3-digit reporting codes can be specified for any user purpose. These codes can then be used to selectively extract specific names and addresses from the Address Book and the subsequent printing of mailing labels, phone directories or complete Address Books. Typical report codes are assigned as follows:</p> <p>Record Type 01 - Sales Area  Record Type 02 - Sales Person  Record Type 03 - Credit Officer  Record Type 04 - Christmas List</p> <p>These codes are appended to Accounts Payable/Receivable transactions to facilitate reporting. A global update program is provided for updating these fields within the transaction files. Validation for Address Book reporting codes is performed against user defined codes, system 01, types 01 through 10.</p>
State	A code defined for the state or province which the system stores in the State/Province/Country Code file (F0075). This is used in conjunction with a country code in UDC 00/CN. This code is usually a postal service abbreviation.
Country	A code which identifies the country and the system stores this in UDC 00/CN. The system uses the country code in the Address Book system for data selection and address formatting. It has no affect on currency conversion.
Postal Code	The US ZIP code or the postal code attached to the address for delivery in any other country. This code is used as the low end value when doing Postal Code Transaction range processing.

## Using Query Search

Query Search works with alpha values in the Alpha Name field. The system can also search for numeric characters associated with the Alpha Name Field. Use Query Search to locate anything from within the Address Book file. From the Name Search program, you can query on:

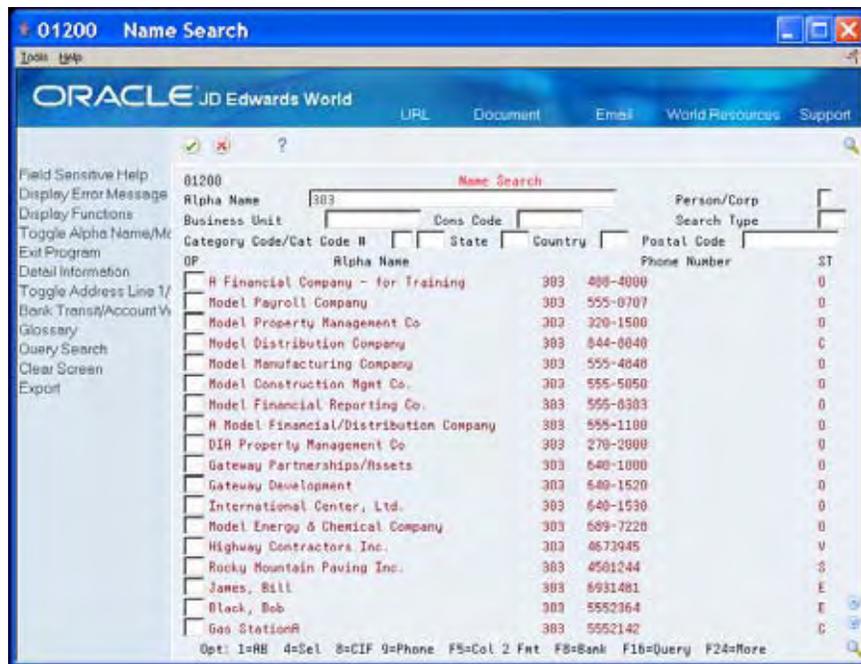
- Area codes
- Any occurrence of a sequence of letters or digits
- Category codes (first 10 Address Book category codes)

### To use Query Search

1. On Name Search, type the query search criteria in the following field.
  - Alpha Name

2. Complete one or more of the following optional fields:

- Person/Corporation
- Search Type
- Business Unit
- Cons Code
- Search Type
- Category Code/Cat Code #
- State
- Country
- Postal Code



3. To initiate the query, choose Query Search (F16).

The records that meet your search criteria appear. In this example, the records with area code 303 display.

### Using Wildcard Search

A wildcard search allows you to use approximate criteria instead of the exact criteria to search for a record. Query Search uses an asterisk (\*) to perform wildcard searches. You can use an asterisk after any number of characters. The system searches for all records that match the characters preceding the asterisk. For example:

- If you search on o\*, the system locates all records that contain the letter “o.”
- If you search on ol\*, the system locates all records that contain the two letters “ol.”

- If you search on old\*, the system narrows its search and locates all records that contain the letters “old.”

A wildcard query search locates anything from within the Address Book file including:

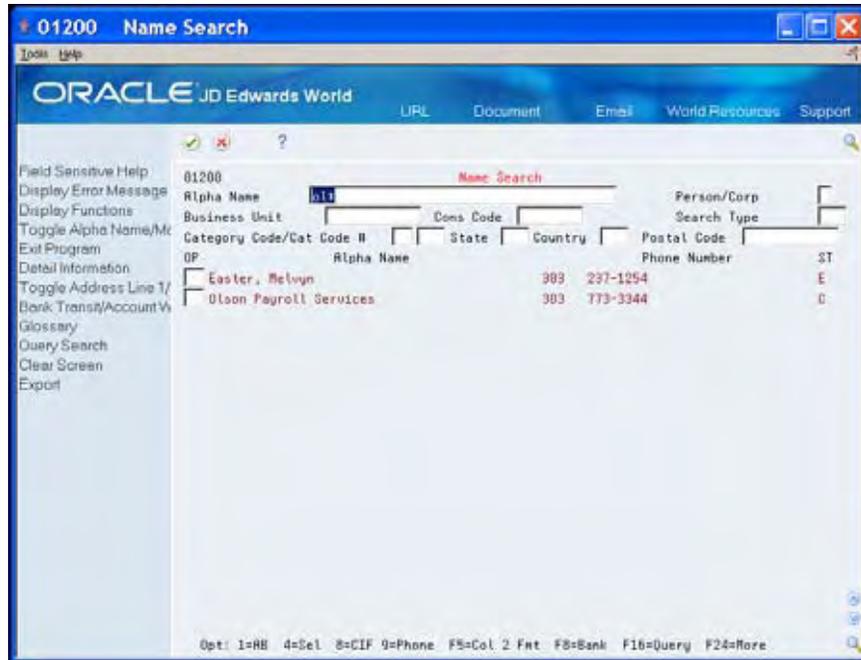
- Any occurrence of a sequence of letters or digits
- Category codes (first 10 Address Book category codes)

### To use wildcard search

1. On Name Search, type your search criteria followed by an asterisk (\*) in the following field:
  - Name Search
2. Complete one or more of the following optional fields:
  - Person/Corporation
  - Search Type
  - Business Unit
  - Cons Code
  - Search Type
  - Category Code/Cat Code #
  - State
  - Country
  - Postal Code
3. Choose Query Search (F16).

Any Address Book record containing the information appears in the Name Search window. For example, if you type OL\* you will access the following:

- A record with OL as part of the mailing address
- A record with OL as part of the name



## What You Should Know About

Additional Functions	Description
<p><b>Toggling between formats on Name Search</b></p>	<p>Choose Toggle Alpha Name/Mailing Name Format (F2) to toggle between a display of the following column titles:</p> <ul style="list-style-type: none"> <li>▪ Mailing Name</li> <li>▪ Alpha Name</li> </ul> <p>Choose Toggle Address Line 1/City/Phone Format (F5) to toggle between a display of the following column titles:</p> <ul style="list-style-type: none"> <li>▪ Phone Number</li> <li>▪ Address Line 1</li> <li>▪ City</li> <li>▪ Address Book Number</li> <li>▪ Credit Message</li> </ul>
<p><b>Refreshing your word search file</b></p>	<p>You might need to refresh your word search files if your query search is missing addresses.</p>

## See Also

- *Updating the Search Word Table in the Address Book Guide*

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# Work with a Record

## Working with a Record

To work with a record, use an action specifying the function you want to perform. Some screens are set up to limit users to certain actions.

Complete the following tasks:

- [Adding a Record](#)
- [Locating a Record](#)
- [Changing a Record](#)
- [Copying a Record](#)
- [Deleting a Record](#)

Each of the tasks in this chapter uses the Address Book Revisions screen as an example.

## What You Should Know About

User Actions	Description
<b>Action icons and codes</b>	JD Edwards World includes icons for actions as well as an Action Code field. You either click the appropriate icon or enter a valid value in the Action Code field when you work with records. Valid values for the Action Code field include: <ul style="list-style-type: none"><li>▪ A or 1 - To add a record</li><li>▪ I or 4 - To locate a record</li><li>▪ C or 2 - To change a record</li><li>▪ D - To delete a record</li></ul>
<b>Security for actions</b>	Not all actions are available on all JD Edwards World screens. You can also identify authorization to perform specific actions by user identification.

## See Also

- *Understand the System Interface* for more information about specialized icons, commands, and actions.

## Adding a Record

You add records to enter new information into the system. Usually, you add records on an Inquiry/Update screen.

### To add a record

1. On Address Book Revisions, leave the following field blank to accept the system-assigned number, or complete the following field:
  - Address Number

2. Complete the following fields:
  - Alpha Name
  - Mailing Name
  - Search Type
  - Payables Y/N/M
  - Receivables Y/N
3. Complete any of the following optional fields:
  - Long Address Number
  - Responsible Business Unit
  - Phone Number
  - Employee Y/N
  - Address
  - User Code

- Effective Date
- Postal Code
- City
- State
- Country
- Industry Class
- County
- Credit Message
- Parent Number

4. Click Add.

Field	Explanation
Address Number	<p>A number that identifies an entry in the Address Book system. Use this number to identify employees, applicants, participants, customers, suppliers, tenants, and any other Address Book members.</p> <p style="text-align: center;"><i>Screen-specific information</i></p> <p>If you leave this field blank, the system assigns a number using the Next Numbers program.</p>
Mailing Name	The company or person to whom billing or correspondence is addressed.
Search Type	<p>A user defined code (01/ST) that identifies the kind of address book record you want the system to select when you search for a name or message. For example:</p> <p>E    Employees</p> <p>X    Ex-employees</p> <p>V    Suppliers</p> <p>C    Customers</p> <p>P    Prospects</p> <p>M    Mail distribution lists</p> <p style="text-align: center;"><i>Screen-specific information</i></p> <p>JD Edwards World recommends that you use T as the search type for each tax authority.</p> <p>When you enter Address Book information for a new employee, the system automatically enters E in this field.</p>

Field	Explanation
Payables Y/N/M	<p>A code that identifies the address as a supplier. Valid codes are:</p> <p>Y Yes, this is a supplier. A processing option determines whether the supplier master record automatically displays after you add an address.</p> <p>N No, this is not a supplier. This code does not prevent you from entering a voucher for the address.</p> <p>M This is a miscellaneous, one-time supplier.</p> <p>F This is a supplier with a foreign address. The IRS requires U.S. companies to identify suppliers with foreign addresses for 1099 reporting.</p> <p>You should code tax authorities as suppliers.</p> <p>Code N is informational only, unless you set a processing option. In this case, a warning message appears if both the Payables and Receivables fields are N.</p>
Receivables Y/N	<p>A code that identifies the address as a customer. Valid codes are:</p> <p>Y Yes, this is a customer. A processing option determines whether the customer master record automatically displays after you add an address.</p> <p>N No, this is not a customer. This code does not prevent you from entering an invoice for the address.</p> <p>Code N is informational only, unless you set a processing option. In this case, a warning message appears if both the Receivables and Payables fields are N.</p>
Long Address Number	<p>A user defined name or number that is unique to the address book number. You can use this field to enter and locate information. You can use it to cross-reference the supplier to a Dun &amp; Bradstreet number, a lease number, or other reference.</p> <p style="text-align: center;"><i>Program-specific information</i></p> <p>On this form, it is the address book number of the establishment.</p>

Field	Explanation
Responsible Business Unit	<p>An alphanumeric field that identifies a separate entity within a business for which you want to track costs. For example, a business unit might be a warehouse location, job, project, work center, branch, or plant.</p> <p>You can assign a business unit to a voucher, invoice, fixed asset, employee, and so on, for purposes of responsibility reporting. For example, the system provides reports of open accounts payable and accounts receivable by business units to track equipment by responsible department.</p> <p>Security for this field can prevent you from locating business units for which you have no authority.</p> <p>Note: The system uses the job number for journal entries if you do not enter a value in the AAI table.</p>
Phone Number	<p>The prefix (in the US, the area code) for the phone number.</p> <p>The required format for US area codes is three characters in parentheses, for example (303).</p> <p>If you require an alternate format to accommodate non-US area codes, you must change the data display rules in the data dictionary.</p> <p>A free-form telephone number without the prefix or special characters, such as hyphens or periods. You can use any applicable telephone number format for a country. You use this field in conjunction with the Phone Prefix field (AR1), where you enter the prefix.</p> <p>When you search for an address using a phone number, you must enter the number exactly as it is set up in the Address Book system.</p> <p>A user defined code (01/PH) that indicates either the location or use of a phone number. For example, you might set up phone types such as fax, cellular, home, home emergency contact, work emergency contact, and so on.</p>
Employee Y/N	<p>A code that indicates whether this address is an employee. Valid codes are:</p> <p>Y Yes, this is an employee.</p> <p>N No, this is not an employee.</p> <p>This code is informational only. It has no predetermined use in the Address Book system.</p>
Address	<p style="text-align: center;"><i>Program-specific information</i></p> <p>When you enter Address Book information for a new employee, the system automatically enters Y in this field.</p> <p>The lines of the mailing address in the Address Book system.</p>

Field	Explanation
User Code	<p>A code that you can define in the data dictionary to reference the address. You can use this field to indicate information that is pertinent to your business.</p> <p style="text-align: center;"><i>Program-specific information</i></p> <p>A code that you can define in the data dictionary to reference the address. You can use this field to indicate information that is pertinent to your business.</p>
Eff (effective) Date	<p>The date on which an address, item, transaction, or table becomes active or the date from which you want transaction to display. The system uses this field depending on the program. For example, the date you enter in this field might indicate when a change of address becomes effective, or it could be a lease effective date, a price or cost effective date, a currency effective date, a tax rate effective date, and so on.</p> <p style="text-align: center;"><i>Program-specific information</i></p> <p>The date on which you want a future address to become effective. On this date, the new address appears in the record. The system maintains the old address in history. You can still inquire on the old address using a prior date.</p>
Postal Code	<p>The US ZIP code or the postal code attached to the address for delivery in any other country. This code is used as the low end value when doing Postal Code Transaction range processing.</p>
City	<p>The city associated with the address.</p>
State	<p>A code defined for the state or province which the system stores in the State/Province/Country Code file (F0075). This is used in conjunction with a country code in UDC 00/CN. This code is usually a postal service abbreviation.</p>
Country	<p>A code which identifies the country and the system stores this in UDC 00/CN. The system uses the country code in the Address Book system for data selection and address formatting. It has no affect on currency conversion.</p>

<b>Field</b>	<b>Explanation</b>
Industry Class	<p>A code that classifies goods and services. This code can be in the format of any one of the following systems of classification:</p> <p>Standard Industrial Classification (SIC) or (NAICS). A numerical system used in the United States to classify goods and services. This code is four (SIC) or six (NAICS).</p> <p>Harmonized System (HS). The international method of classifying goods. More than fifty countries use this code. It can be up to 10 digits.</p> <p>Standard Industrial Trade Classification (SITC). A numerical code system developed by the United Nations to classify goods used in international trade. International organizations use this code. It can be up to six digits.</p>
County	The name of a county, parish, or other political district that is necessary for the address or for tax purposes.
Credit Message	<p>A UDC (00/CM) that displays information about a particular customer or supplier. Examples:</p> <p>1 Over credit limit</p> <p>2 Requires purchase order</p> <p>3 Not on maintenance agreement</p> <p>4 Notify the credit manager</p> <p>The Customer Master Information and the Supplier Master Information screens display credit messages for customers and suppliers when you enter or locate information.</p>
Parent Number	Accesses the Name Search screen

## What You Should Know About

<b>Fields on Address Book Revisions</b>	<b>Description</b>
<b>Clearing the screen</b>	Always clear data from a previous record before adding another record. Choose Clear Screen (F22) to clear all data from a screen.
<b>Assigning Address Book numbers</b>	You can assign the Address Book Number manually or allow the Next Number program to assign the Address Book number for you.
<b>Duplicating alpha name to mailing name</b>	If the alpha name and the mailing name are the same, choose Duplicate Alpha Name on Mailing Line (F8) in the Mailing Name field to copy the information from the Alpha Name field.

<b>Fields on Address Book Revisions</b>	<b>Description</b>
<b>Entering responsible business unit</b>	If you leave the Responsible Business Unit field blank, the system uses the value you set up in the data dictionary. If nothing is set up in the data dictionary, the system enters 1 in the field.

## Locating a Record

You can locate existing records to review the information. Once you locate a record, you can change or delete it.

### To locate a record

1. On Address Book Revisions complete one of the following fields:
  - Address Number
  - Long Address Number
2. Click Inquire.  
The address book information appears.

## Changing a Record

You must locate a record before you can change it.

### To change a record

1. On Address Book Revisions, locate the record.
2. Place the cursor in the fields that contain the information you want to change.
3. Type the new information.
4. Click Change.  
The screen clears to signify a successful change.
5. You can locate the record again to verify your changes.

## Copying a Record

### To copy a record

1. On Address Book Revisions, locate the record.
2. In the Address Number field, perform one of the following:
  - Clear the Address Number and allow the system to assign the next number

- Type a unique number in the Address Number field
3. Click Add.  
The screen clears to signify a successful change.
  4. You can locate the record again to verify the addition.

## Deleting a Record

### To delete a record

1. On Address Book Revisions, locate the record.
2. When the address book record displays, verify that this is the record you want to delete.
3. Click Delete.

The screen clears to signify a successful deletion.

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**Caution:** When deleting records, the system deletes the record without asking for confirmation.

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You cannot delete address book records that have transactions in files throughout the system.



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## 8 User Defined Codes



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# Overview to User-Defined Codes

## Objectives

- To understand user-defined codes (UDCs)
- To understand category codes

## About UDCs

To tailor the software system to your business needs, you can assign your own set of valid values to a data field.

To understand how to customize your data, complete the following:

- Work with UDCs
- Work with category codes

## What Are UDCs?

JD Edwards World software allows you to create UDC values. UDCs use table values to define the values for an input-capable field without having to make program changes. Some examples of UDC fields include:

- State and province codes
- Spending account codes
- Unit of measure codes

You can define most standard information in UDC tables. Generally, you define these codes for your business purposes. JD Edwards World sets up many of these codes in the software and they are available when you install your system. Each system has its own UDC types.

When a JD Edwards World program encounters a UDC field, it validates the data that the user enters against the table of valid values. The program issues an error message if it does not locate a match.

Although the system decides the title of the code type, you can create an unlimited number of values for the UDCs.

For example, for the Address Book system (system code 01), two types of UDCs for this system are search type (ST) and language (LP). The following table lists these code types, as well as examples of codes defined for the code type.

Code Type	Code	Description
Search Type	A	Applicants
	C	Customers
	E	Employees
	F	Facilities
	I	Investors
	J	Jobs
Language	B	Flemish
	D	Dutch
	E	English
	F	French
	G	German

## What Are Category Codes?

Use category codes to define additional codes that describe or categorize items for management reporting, consolidation, totaling, and characteristic identification. A category code is a UDC for which you define the code title and the valid values. Codes and descriptions are included for each example.

Category Code	Code	Description
Branch (Category Code 01)	ATL	Atlanta Branch
	CHI	Chicago Branch
	DAL	Dallas Branch
	DEN	Denver Branch
	ES	Eastern Mfg. Region
Account Representative (Category Code 02)	ANN	Annette Walters
	JIM	Jim Kellerman
	ROD	Rod McLind

## Grouping Data in Address Book

You use Category Codes to group and categorize addresses for reporting purposes.

Two groups of category codes are in the Address Book system:

- Who's Who (10 codes)
- Address Book (30 codes)

Both the title of the category code and valid values are user-defined.

## How Are Category Codes Defined?

The user defines each category code. For example:

- Category code 1 = Branch
- Category code 2 = Account Representative

The user also defines the valid values of the code. For example:

- Branch: DEN = Denver Branch
- Salesperson: ROD = Rod McLind

## Summary of UDCs and Category Codes

The following table details the level to which you can customize the information that UDCs and category codes provide:

Code Type	Title	Values
UDC	Search Type (JD Edwards World defined)	User-defined
Category Code	Branch (User-defined)	User-defined

## See Also

- *Working with User-Defined Codes in the Technical Foundation Guide*



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# Work with User-Defined Codes

## Working with User-Defined Codes (UDCs)

You assign a unique value to a code to customize a program to suit your individual needs. For example, if you would like to indicate whether an employee is certified in a specialized field, create a code to represent the specialization. The value is the designation you assign to a code.

To work with UDCs, complete the following tasks:

- [Locating a UDC](#)
- [Viewing a Text Memo](#)
- [Accessing the UDCs Revisions Screen](#)
- [Adding a UDC](#)
- [Changing a UDC](#)
- [Deleting a UDC](#)

### See Also

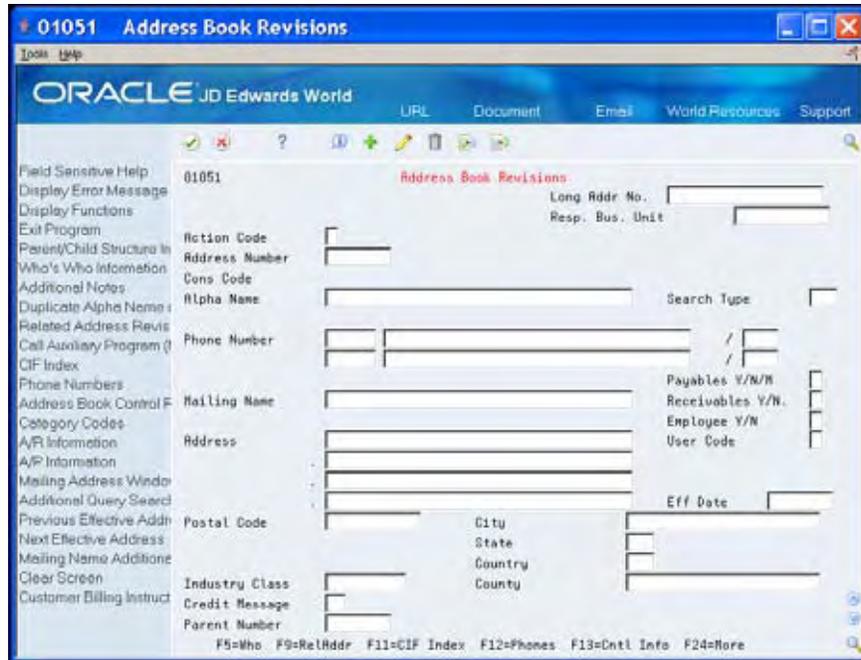
- *Working with UDCs in the Technical Foundation Guide*

## Locating a UDC

Each UDC field corresponds to a system code and a UDC type. You need to know these identifiers when you assign values to data. For example, the UDC table name for Address Book Revision search types is system 01/ type ST

### To locate a UDC

1. On Address Book Revisions, place the cursor in the following field:
  - Search Type



2. Choose Field Sensitive Help (F1)

The User-Defined Codes Window displays.



## What You Should Know About

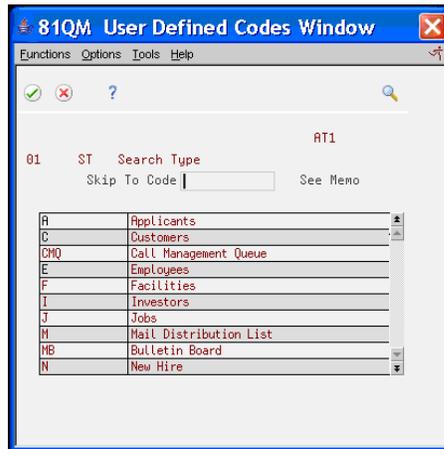
Sorting the Display	Description
Sort order switch UDC Code/UDC Desc (F6)	Allows you to sort the view of the data in the window in an alphanumeric sequence by the UDC code or by the description.

## Viewing a Text Memo

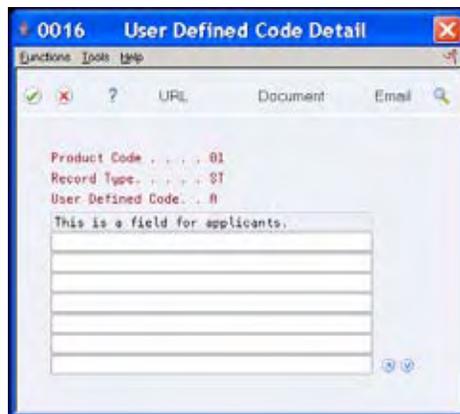
Text memos allow you to attach electronic notes to explain additional details about the UDC value on the screen. If an item has a memo, the system highlights the item and the words *See Memo* display at the top of the screen. The following task uses UDC table 01/ST as an example.

### To view a text memo

1. On User-Defined Codes Window, place your cursor on the following field:
  - Applicants



2. Choose Display Memo (F14) from the Functions menu.  
User-Defined Code Detail displays.



## What You Should Know About

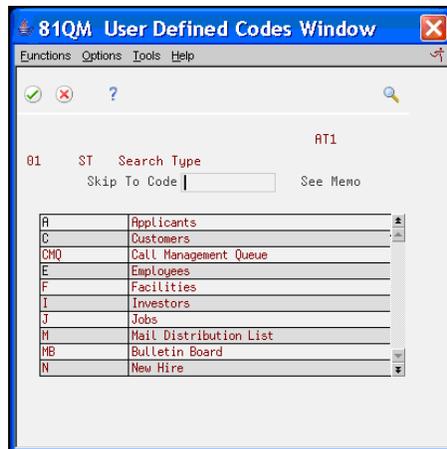
Additional Functions	Description
<b>Display User &amp; Date of Entry &amp; Update (F6)</b>	Allows you to view a window that displays the user ID of the user who entered the information and when this user did so.
<b>Insert Line at Cursor Location (F8)</b>	Allows you to insert a line of text into an existing line of text
<b>Delete Line at Cursor Location (F9)</b>	Allows you to delete a line of existing text
<b>Select Model Memo (F15)</b>	Allows you to choose existing text that has been set up as a model

## Accessing the UDCs Revisions Screen

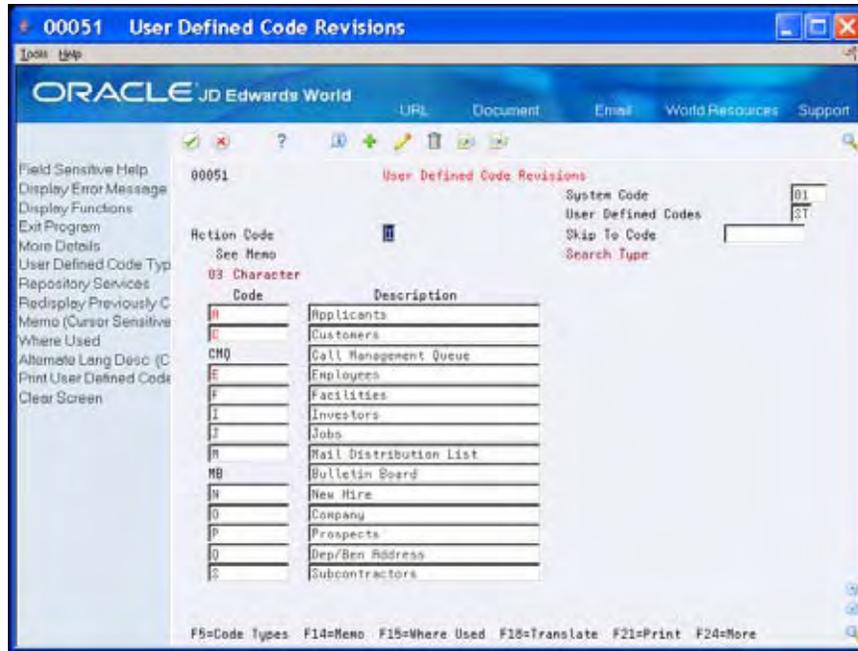
The User-Defined Codes Revisions screen displays UDCs and their descriptions.

### To access the User-defined Codes Revisions screen

1. On User-Defined Codes Window, choose Exit to User-Defined Codes Maintenance (F10).



On User-Defined Code Revisions, the UDCs for Search Type are in the 03 Character Code column. The number next to the words “Character Code” indicates how many characters the UDC accommodates. The UDC descriptions are next to the code they describe in the Description column.



2. To locate the table of codes for any UDC, complete the following fields:

- System Code
- User Defined Codes

## What You Should Know About

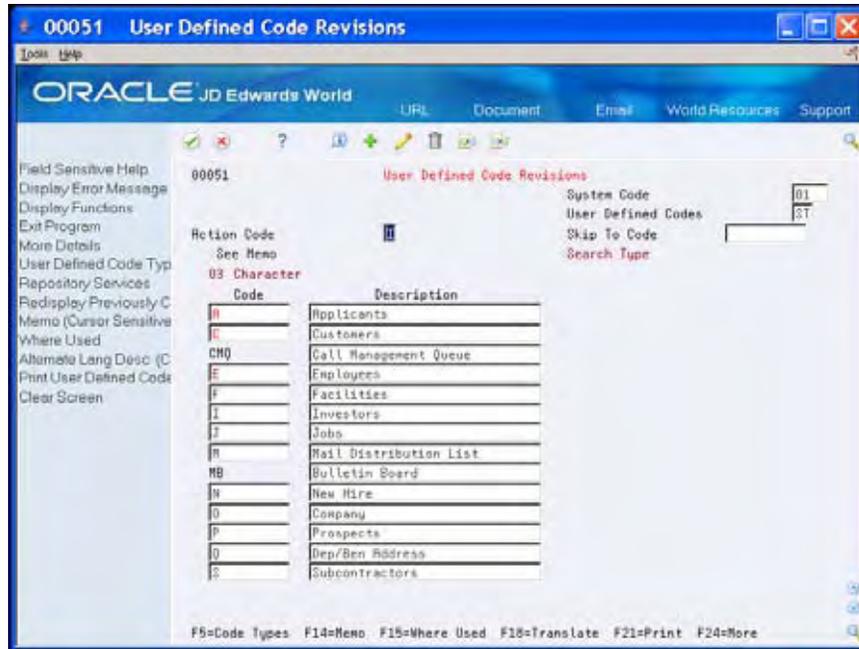
Viewing UDCs	Description
Viewing a full UDC list	Choose User Defined Code Types (F5) to view an entire table of user codes for a particular system.

## Adding a UDC

You can add a UDC to meet your business purposes.

### To add a UDC

1. On User Defined Codes Revisions, on any line, complete the following fields:
  - Code field
  - Description field



2. Click Add.

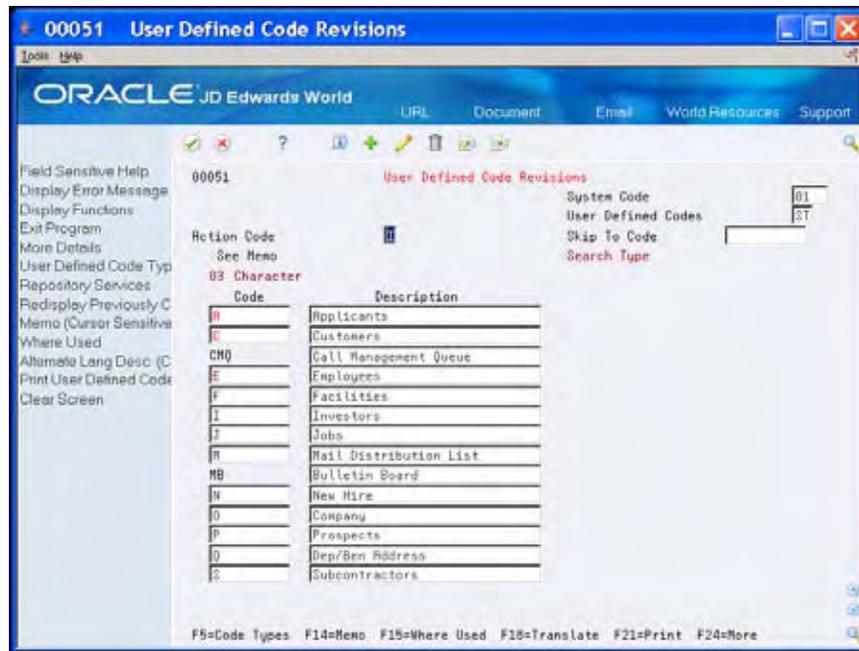
The screen clears to indicate a successful addition. The system retains the old code.

## Changing a UDC

As your business needs change, you might need to change your UDCs. When a UDC is referred to as hard coded, you should not change it. Programming has been defined to work with hard-coded UDCs. If you change the code, the programming will not work correctly.

### To change a UDC

1. On User Defined Codes Revisions, type over incorrect information in any of the following fields:
  - Code
  - Description



2. Click Change.

The screen clears to indicate a successful change.

---

**Note:** If you change information in the Code field, you must delete the original code from the list of data items.

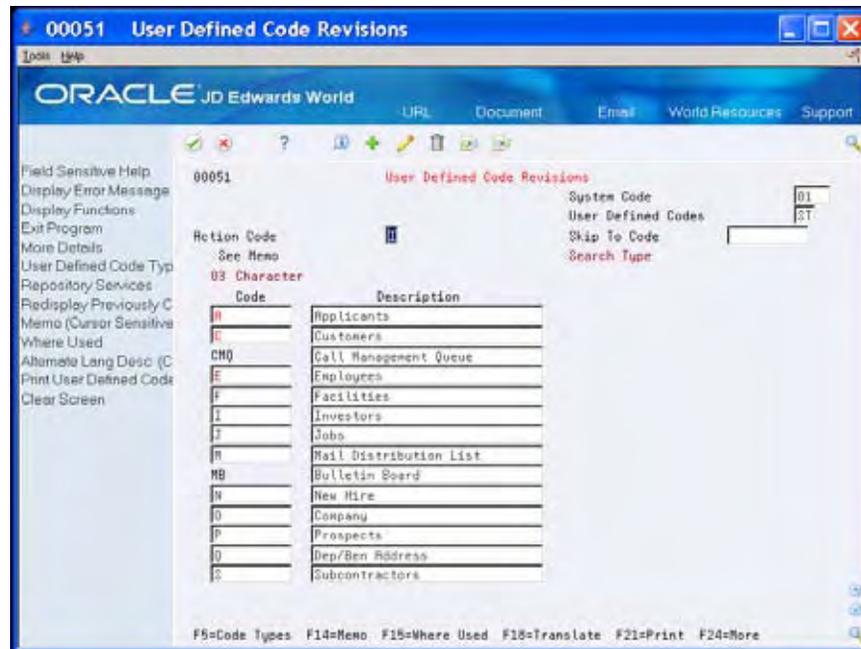
---

## Deleting a UDC

As your business needs change, a UDC might not be relevant. You can delete UDCs that are no longer necessary.

### To delete a UDC

1. On User Defined Codes Revisions, locate the UDC table that contains the code you want to delete.



2. Clear the following fields:

- Code
- Description

3. Click Change

4. Verify the deletion.

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# Work with Category Codes

## Working with Category Codes

Category codes are user defined codes to which you can assign a title and a value. The title appears on the appropriate screen next to the field in which you type the code.

Complete the following:

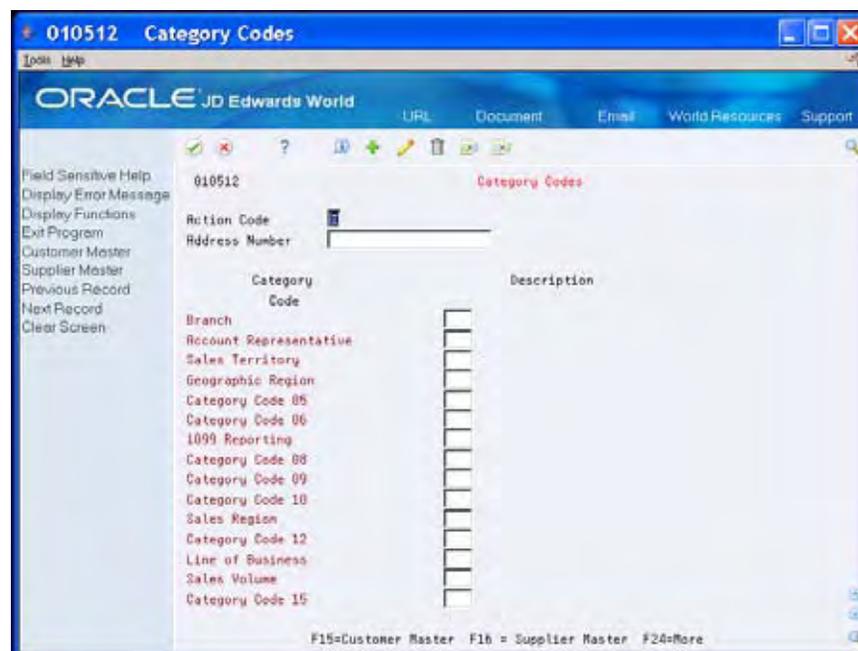
- [Locating Category Codes](#)
- [Viewing Valid Values](#)

## Locating Category Codes

The Category Codes screen allows you to select values from a number of choices. You can access Category Codes from any screen containing a field that uses category codes.

### To locate category codes

1. On Address Book Revisions, choose Category Codes (F14).



2. On Category Codes, perform one of the following to view additional category codes:
  - Use the Page Up and Page Down keys
  - Click the up and down arrows

## Viewing Valid Values

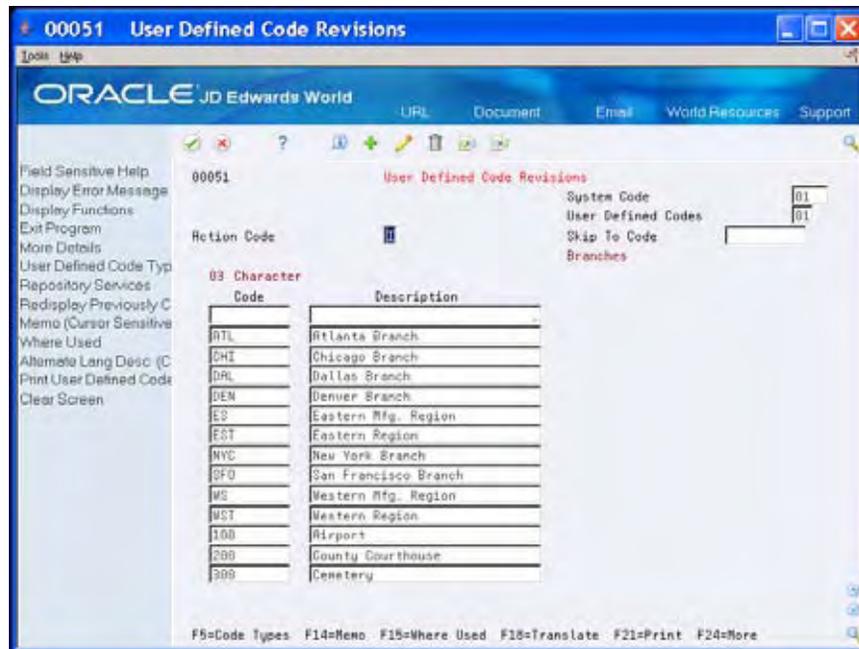
You can review all valid values for a category code. You can also add, change, or delete category codes.

### To view valid values

1. On Category Codes, position your cursor next to the category code you want to view and click Prompt for valid field values (F1).



2. On User Defined Codes Window, choose Exit to User-Defined Codes Maintenance (F10) to make revisions, additions, and deletions.



- On User Defined Codes Revisions, complete the steps to add, change, or delete.

## What You Should Know About

Category Code Titles	Description
<b>Changing the title of a category code</b>	You define the title of a category code in the data dictionary. JD Edwards World uses this title in all screens and reports. You need to know the data item in order to change the title.

## See Also

- Working with User Defined Codes*



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## 9 Reports



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# Overview to Reports

## Objectives

- To understand report formats
- To understand the steps of DREAM Writer
- To understand how to print a report
- To learn to use output and job queues

To understand how to generate reports in any system, complete the following tasks:

- Define version preferences
- Create a version
- Work with print options
- Work with DREAM Writer versions
- Work with submitted reports
- Work with output and job queues

## About Reports

You can print standard and custom reports from the records stored in the system.

This chapter includes the following topics:

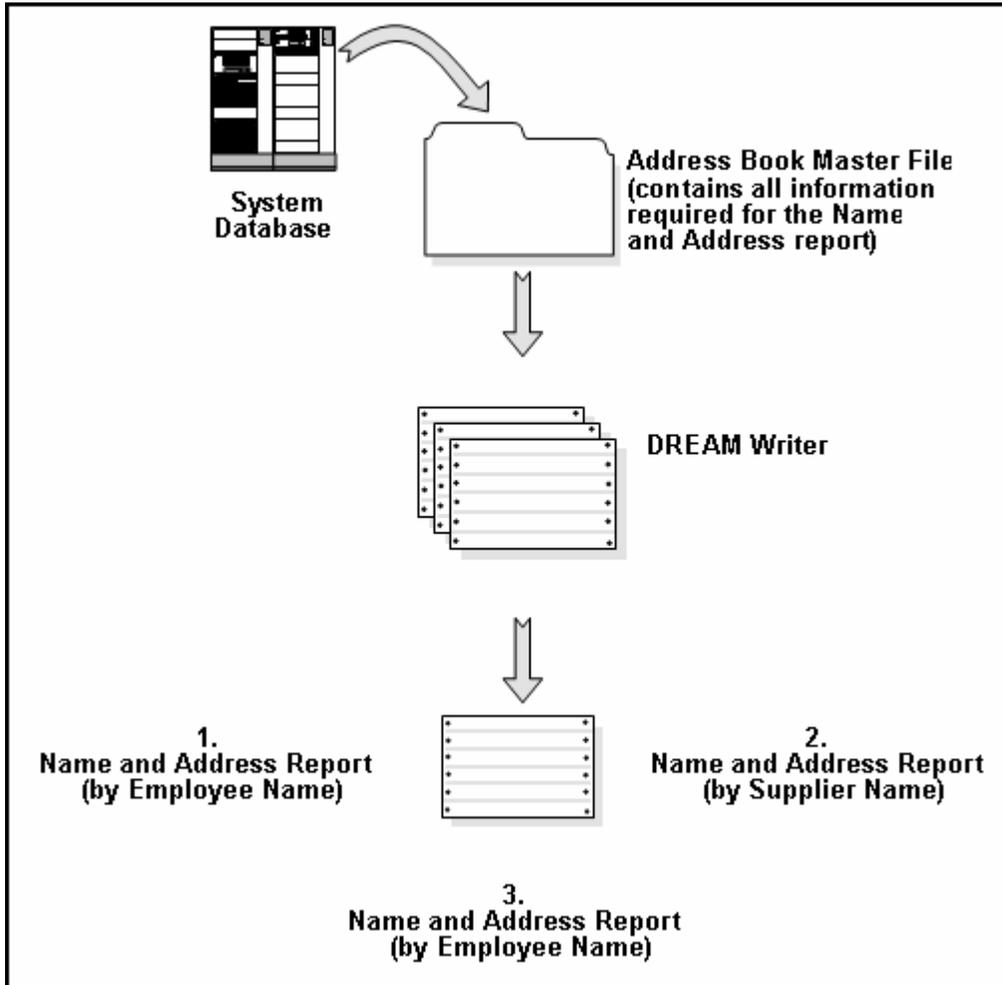
- [About DREAM Writer](#)
- [About Report Design](#)
- [About Report Formats](#)
- [About Data Relationships](#)
- [About And/Or Logic](#)

## About DREAM Writer

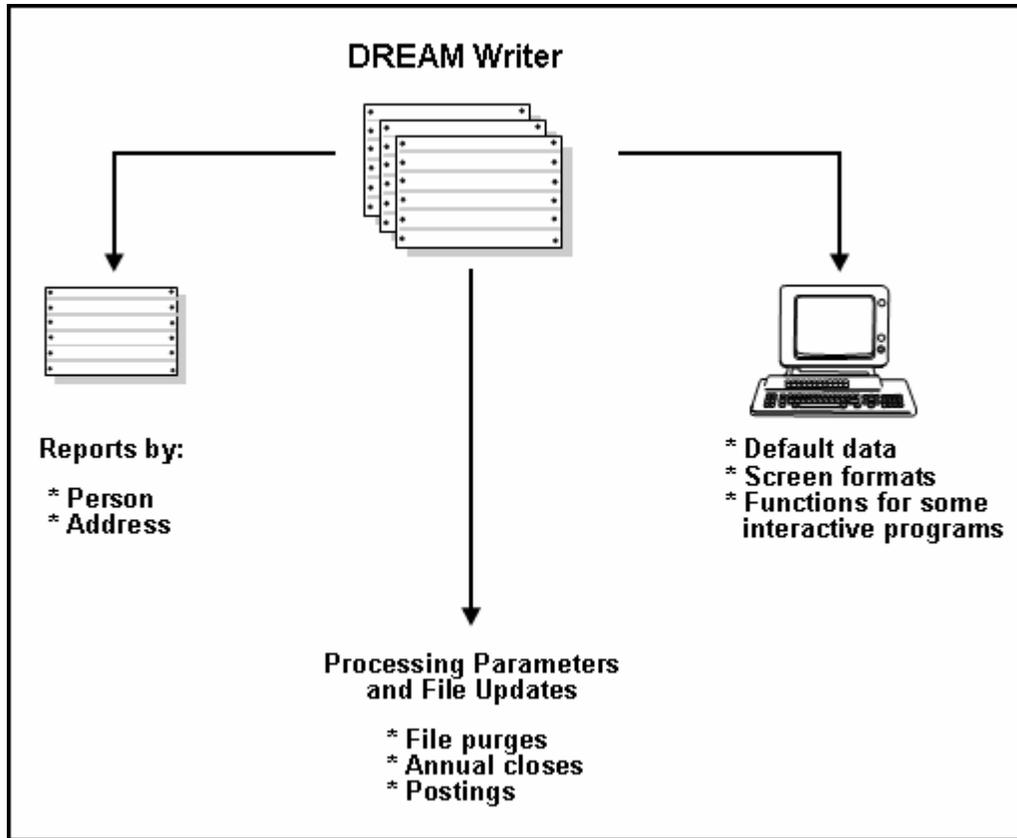
The Data Record Extraction and Management facility (DREAM Writer) is a report preprocessor. A report preprocessor includes data manipulation and cataloging functions that you can use to generate reports. As a report preprocessor, DREAM Writer allows you to create unlimited versions of each report. For example, using the same report format as the Name and Address Report, you can set up the following reports:

- Name and Address by Employee Name
- Name and Address by Supplier Name
- Name and Address by Employee Number

These versions have the same columns but different data, report titles, and data sequence. The following graphic represents the movement of information through DREAM Writer:

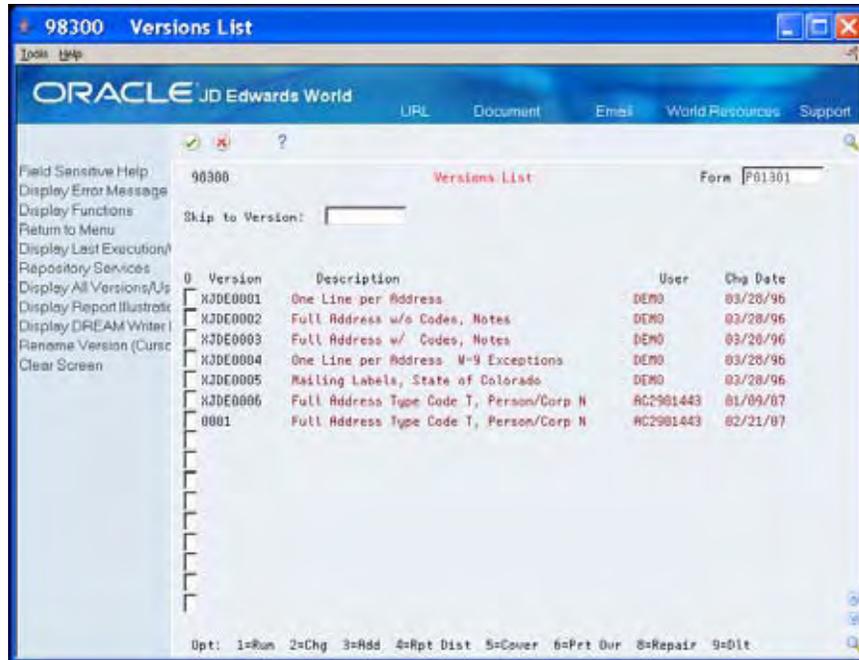


Essentially, the DREAM Writer controls data records that you select for a specific version and the sequence of the records as they print on the report. You control printer parameters, special processing options, and report titles. You can also use the DREAM Writer to present different selections of data or different formats for screen displays, as well as to establish processing parameters for batch jobs.



## About Report Design

Begin the report design process from a form containing a versions list. The main portions on the form determine the format of your report. An example of a form containing a version list follows:



The following table details the main portions of the versions list:

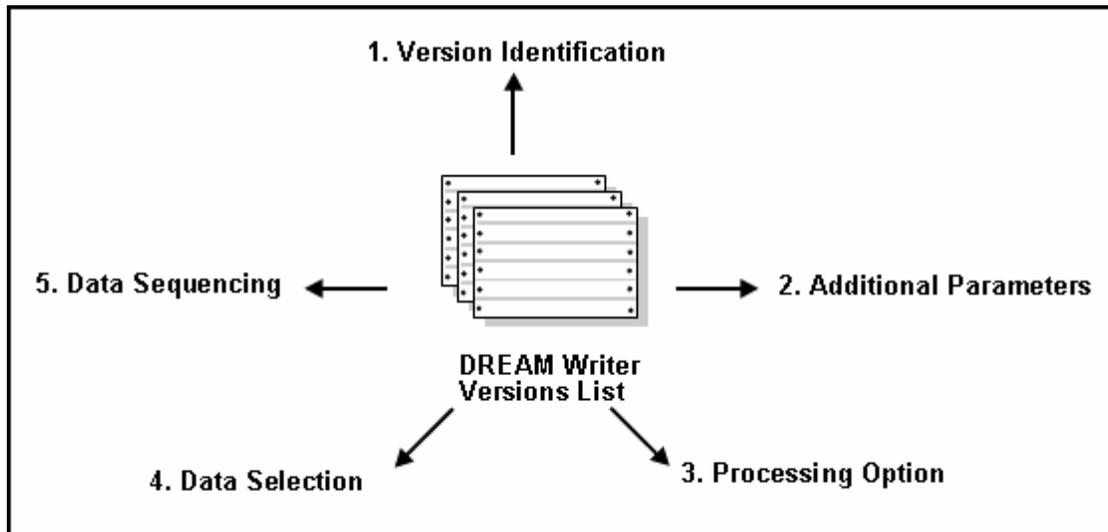
Field	Explanation
Version	Identifies a group of items that the system can process together, such as reports, business units, or subledgers. <i>Screen-specific information</i> A specific set of parameters used to populate a DREAM Writer form.
Description	A description of the version that appears next to the version number. The version title is different from the report title.
User	The IBM-defined user profile. <i>Screen-specific information</i> The IBM-defined user profile of the last person to update that version.
Chg Date	The date of the last update to the file record.

From the versions list, you can run a report at its current level, create a new version, copy an existing version, or modify an existing version. The action you perform determines what the system displays next.

Action	Description
Run, copy, or add a version	Displays the Version Identification screen where you start defining information for your version. The DREAM Writer Version Copy window displays first when you copy or add a version.

Action	Description
Change a version	Displays a window which lists all DREAM Writer screens. You choose the screen you want to display based on the information you want to change.

The following graphic represents the five forms you review when you work with DREAM Writer:



Use the DREAM Writer forms to define or change the following information:

DREAM Writer forms	Description
Version identification	You can define an internal description as well as up to three lines of report heading information.
Additional parameters	You define parameters for the job, such as the based on file, whether you want the cover page to print, and in which job queue you want to process the job.
Processing options	Use processing options to control the type of report that the system prints. This information includes the format and print functions. Each screen ID has a unique set of processing.
Data selection	Data selection allows you to select the information you want the system to print on the report. You can select records from any field in the based on file. If you do not specify data, the system prints every record on the report.
Data sequencing	Use data sequencing to specify how the system sequences the data, how to total the data, and where the system creates page breaks.

## About Report Formats

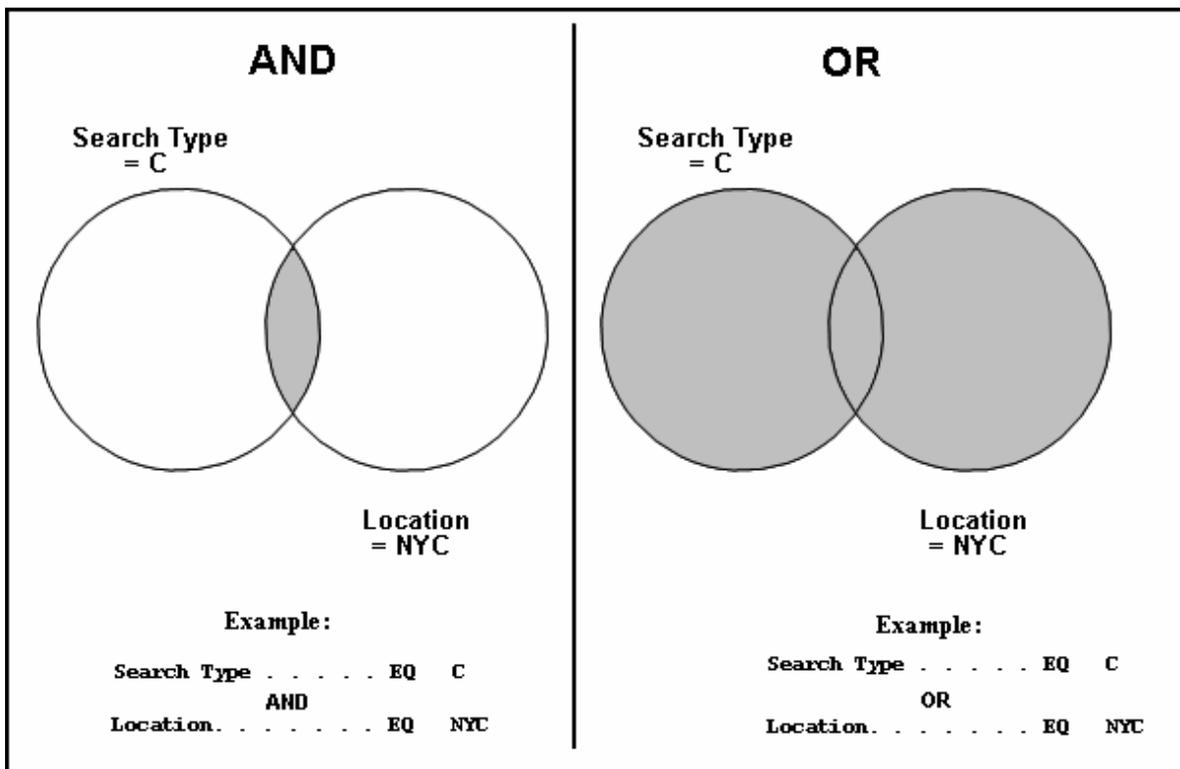
Report templates are predefined formats of DREAM Writer reports. You cannot add or remove a column of data from a template.

## About Data Relationships

The data selection step in the DREAM Writer reporting process determines the amount of information to include in your report version. A data relationship refers to the expressions that determine the values for your version. For example, the expression “greater than or equal to one thousand” includes all numbers above and including the number one thousand.

## About And/Or Logic

Use And/Or Logic to determine how much information to include in your report. For example, if you need a list of customers associated with the New York Branch, use ‘And’ logic to include only the data that two or more fields have in common. For a list of customers and a list of anyone associated with the New York branch, use Or Logic to include the data from both fields.



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# Define the Version Preferences

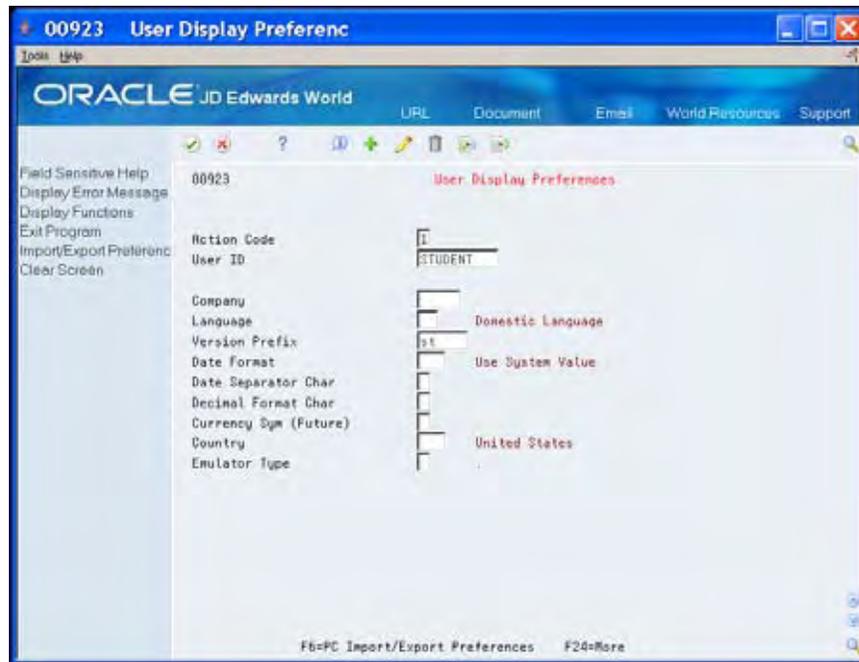
## Defining Version Preferences

The User Display Preference Revisions screen allows you to set up individual user display values. For DREAM Writer reports, you can specify a version prefix for new versions that you create.

If you choose not to have a specific setup, the system uses system defaults for all values that display.

### To define a version preference

1. On any menu, enter 85 on the command line.



2. On User Display Preference Revisions, complete the following field
  - Version Prefix
3. Click Add to add a new prefix or click Change to change an existing prefix.

Field	Explanation
User ID	The IBM-defined user profile.

Field	Explanation
Version Prefix	Identifies a default prefix to assign when creating DREAM Writer versions. Versions can then be suffixed with additional characters.
	<i>Screen-specific information</i>
	Identifies a default prefix to assign when creating DREAM Writer versions. Versions can then be suffixed with an alpha-numeric character up to 6 positions in length.

## What You Should Know About

User Display Preferences	Description
<b>Revising a User Display Preference record</b>	If you are attempting to revise your User Display Preference record, you cannot have other active jobs running (interactive or batch) for the system to accept the change. Allow all batch jobs to finish and complete all other interactive jobs before making a change.
	If you are attempting to revise another user's record, that user cannot have active jobs running and should be signed off the system before the system accepts change.

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# Create a Version

## Creating a Version

When you create a version in DREAM Writer, you assign the specifications for your report by following the five steps of DREAM Writer. The following table details the steps in the DREAM Writer program:

Step	Description
Version Identification	Designate a title for your version. You have the option of designating a series of lines to further describe the records in your report. Your title displays at the top of your report.
Additional Parameters	Set the version control parameters to determine various job specifications such as: <ul style="list-style-type: none"><li>▪ Security</li><li>▪ Job queues</li><li>▪ Whether to include a cover page</li></ul>
Processing Option Values	Control the characteristics of a printed report. For example, when you select a report format, choose the following: <ul style="list-style-type: none"><li>▪ Which pre-defined "template" to print</li><li>▪ Summary or detail</li><li>▪ Labels or lists</li><li>▪ Page breaks</li><li>▪ Totaling and other special calculations</li></ul>
Data Selection Values	Select information from the Data Selection screen to print only the records pertinent to your needs. Keep in mind the following considerations: <ul style="list-style-type: none"><li>▪ What data should you include for selection?</li><li>▪ What are the data relationships?</li><li>▪ What are the selection values?</li></ul>
Data Sequencing Values	Organize the records in your report to clearly represent your data.

To create a version, complete the following:

- [Copying an Existing Version](#)
- [Identifying a Version](#)

- [Revising Parameters](#)
- [Revising Processing Options](#)
- [Selecting Your Data](#)
- [Arranging Data in Sequence](#)

## What You Should Know About

DREAM Writers	Description
<b>Using function exits in DREAM Writer</b>	<p>The following functions are screen specific function exits in the DREAM Writer program:</p> <ul style="list-style-type: none"> <li>▪ More Details (F4) allows you to access additional fields where you can define ascending or descending sequence or make a sequence value optional on the Data Sequence Setup screen.</li> <li>▪ Update with Redisplay (F5) updates the Data Selection screen with only those data items with a Y in the Include in Selection field.</li> <li>▪ Return to Options or Version ID Entry (F12) returns you to the previous screen if you go too far in the DREAM Writer report creation process.</li> <li>▪ Display all data fields (F16) displays all Based On File fields available for sequencing on the Data Selection and the Data Sequence Setup screens.</li> </ul>
<b>Pressing Enter in DREAM Writer</b>	<p>When you press Enter in DREAM Writer, you are informing the program that you are finished with the current step. You should enter all the information for each step before you press Enter.</p>

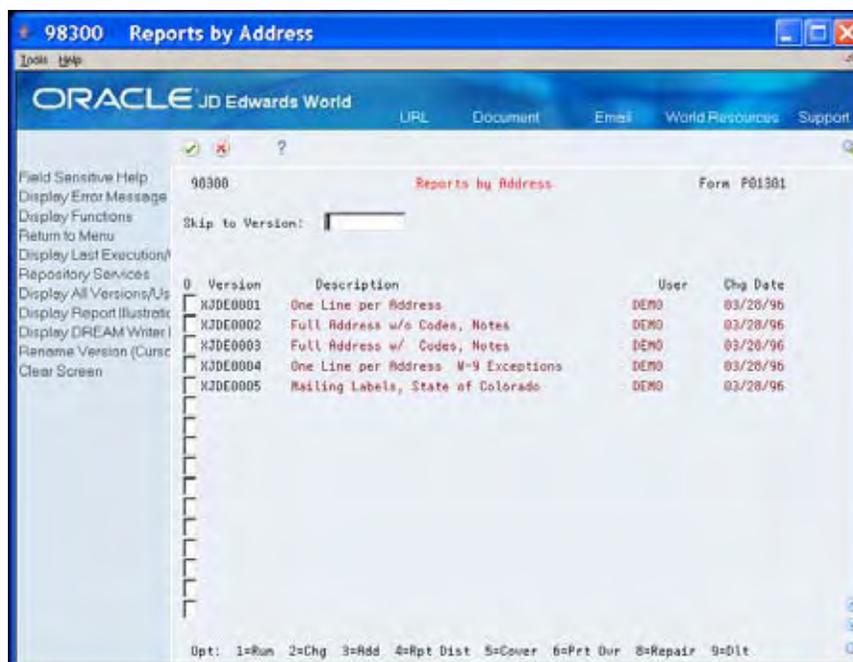
## Copying an Existing Version

When you copy, you add a new version based on an existing version. Copying an existing version is the simplest way to create a new version in DREAM Writer.

	<p>From Address Book (G01), choose <b>Report and Labels</b>                  From Periodic Processes (G121), choose <b>Reports by Address</b></p>
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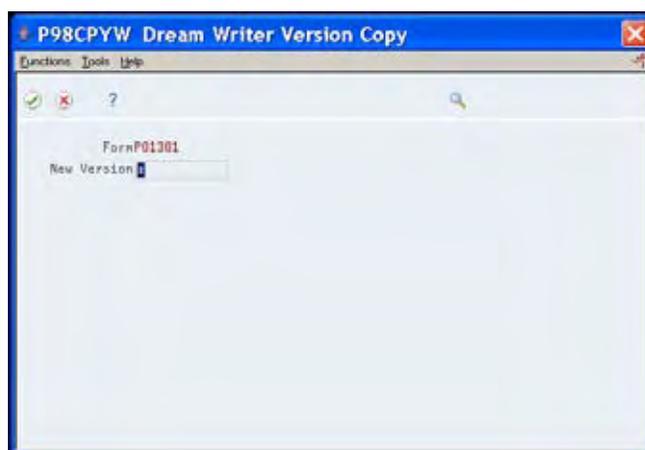
### To copy an existing version

1. On Reports by Address, enter 3 in the Option (O) field for the version you want to copy.



2. On Dream Writer Versions Copy, complete the following field:

- New Version



3. Press Enter to confirm your version title and to move on to the next step of DREAM Writer.

## What You Should Know About

Prefixes	Description
Assigning a number only	If you did not assign a user prefix, an asterisk appears in the New Version field. Press Enter and the system assigns the next available version number with no prefix.

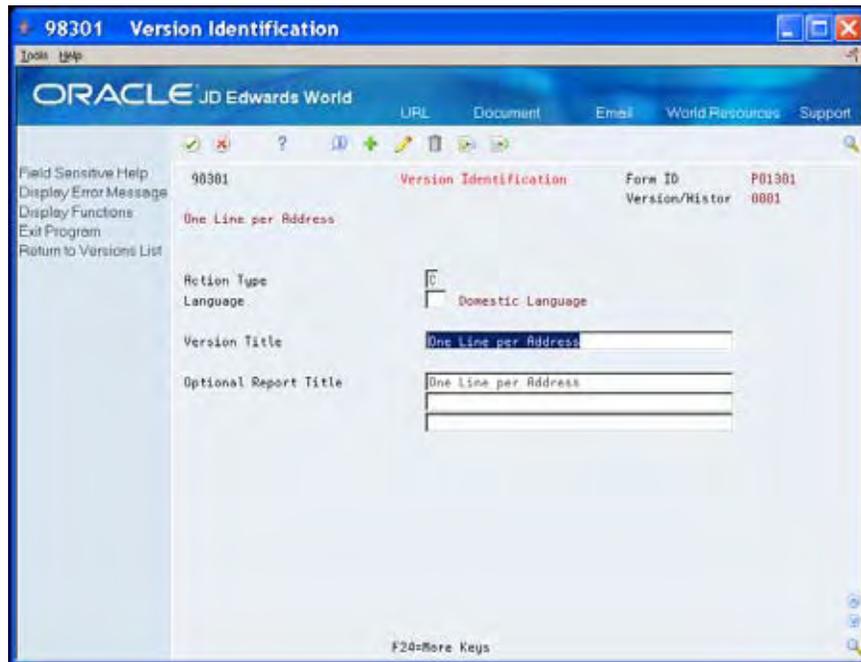
Prefixes	Description
<b>Assigning a version prefix</b>	If you want a unique prefix for your version, enter the prefix followed by an asterisk. The system appends the next version number to your prefix.

## Identifying a Version

You can assign a version title to any report version. On the versions list, the title appears in the Description field next to the version number.

### To identify a version

1. On Version Identification, complete the following field:
  - Version Title



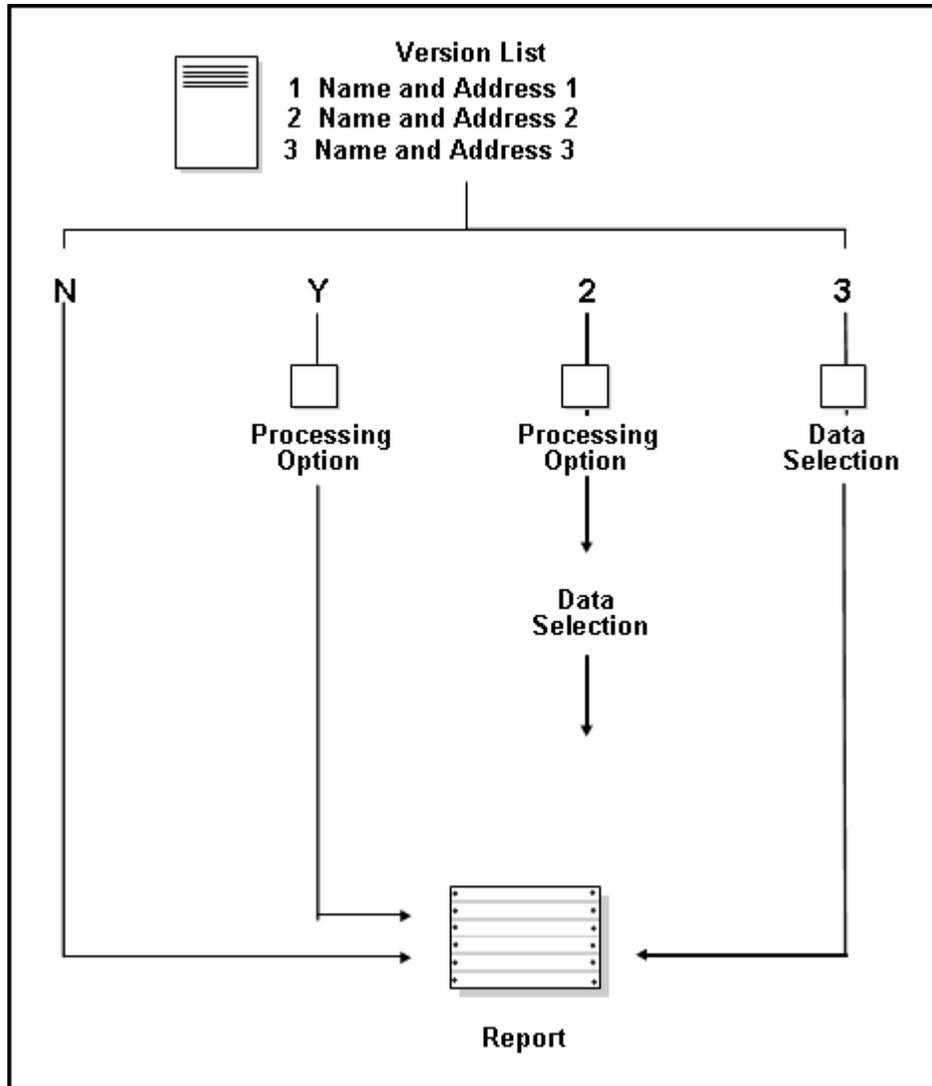
2. Complete the following optional fields:
  - Language
  - Optional Report Title
3. Press Enter to confirm the information and to move on to the next step of DREAM Writer.

Field	Explanation
Language	<p>A user defined code (system 01/type LP) that specifies a language to use in screens and printed reports.</p> <p>If you leave the Language field blank, the system uses the language that you specify in your user preferences. If you do not specify a language in your user preferences, the system uses the default language for the system.</p> <p>Before any translations can become effective, a language code must exist at either the system level or in your user preferences.</p> <p style="text-align: center;"><i>Screen-specific information</i></p> <p>A user defined code that specifies the language used for the title of this version. The allowed values are found in system 01, user defined code type LP.</p>
Version Title	A description of the version that appears next to the version number. The version title is different from the report title.
Optional Report Title	The title that appears at the top of the report. It can include up to three lines with 40 characters each. The lines are automatically centered on the report.

## Revising Parameters

Use the Additional Parameters screen to set up the processing route for your report version. You can also specify if you want processing options to display each time you submit this version.

The following graphic illustrates how the valid values for the Mandatory Processing Option field interact with your report version.



**Note:** Do not set a mandatory processing option if you wish to submit your job as an unattended night process.

### To revise parameters

1. On Additional Parameters, if necessary, change the following fields:
  - Print Cover Page (Y/N)
  - Print Instructions (Y/N)
  - Mandatory Processing Option
  - User Exclusive (Y/N)
  - Job Queue
  - Hold on Job Queue (Y/N)

983011 Additional Parameters

ORACLE JD Edwards World

Field Sensitive Help 983011 Additional Parameters Form ID P01301  
 Display Error Message One Line per Address Version/History 0001  
 Display Functions  
 Return to Versions List  
 Batch PC Export Param  
 Return to Versions List

Based on File F0101JC Based on Member RLL

Processing Overrides

Print Cover Page (Y/N) Y Print Instructions (Y/N) N  
 Mandatory Processing Option Y User Excl (0/1/2/3/4) 0  
 Job Queue \*J000 Hold on Job Queue (Y/N) N  
 Format Name F0101JC Output Media SST  
 Job to Execute File Output Type 1  
 Type Report Totaling 1 Override Logical File

Open Query File Options

Optimize Option(1/2/3) 1  
 Sequential Only(Y/N) Y  
 Open for Output(Y/N) N  
 Open for Update(Y/N) N  
 Open for Delete(Y/N) N

F6=Batch PC Export Parameters F24=More Keys

- Press enter to confirm the information and to move on to the next step of DREAM Writer.

Field	Explanation
Print Cover Page (Y/N)	<p>A code that controls whether to print the cover page for the version.</p> <p>Y Print cover page</p> <p>N Do not print cover page</p> <p>For STAR reporting this code controls the printing of a separate specifications report.</p> <p><i>Screen-specific information</i></p> <p><b>Note:</b> You can use 1 for Y and 0 (zero) for N.</p>
Print Instructions (Y/N)	<p>Specifies whether to print the help instructions to accompany the requested report.</p> <p>Y Print the help instructions</p> <p>N Do not print the help instructions</p> <p><b>Note:</b> You can use 1 for Y and 0 (zero) for N.</p>

Field	Explanation
User Exclusive (0/1/2/3)	<p>This field allows you to restrict user access for a report version.</p> <p>The valid values are:</p> <p>0 No security. Anyone can change, copy, delete, or run the version. This is the default when adding a new version.</p> <p>1 Medium security. Only the user who created the version can change or delete it. All users can copy or run the version. This is how the JD Edwards World Demo versions are delivered.</p> <p>2 Medium to full security. Only the user who created the version can change, delete, or run it. All users can copy the version.</p> <p>3 Full security. Only the user who created the version can change, delete, copy, or run it.</p>
Mandatory Processing Option	<p>A code used to designate whether a data item may optionally be selected by the user.</p> <p><i>Screen-specific information</i></p> <p>A code to designate whether processing options or data selection appear before execution of the job. Values are:</p> <p>Y Mandatory display of processing options screen at runtime.</p> <p>2 Displays both Processing Option and Data Selection screens at runtime.</p> <p>3 Mandatory displays Data Selection screen at runtime.</p> <p>N Immediate submission to batch.</p> <p><b>Note:</b> You can use 1 for Y and 0 (zero) for N.</p>
Hold on Job Queue (Y/N)	<p>A code used to indicate whether to hold the submitted job in the job queue. Values are:</p> <p>Y Yes</p> <p>N No</p>

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**Caution:** When you run your report, you will receive unpredictable results in your version if you alter the Based on File field.

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## See Also

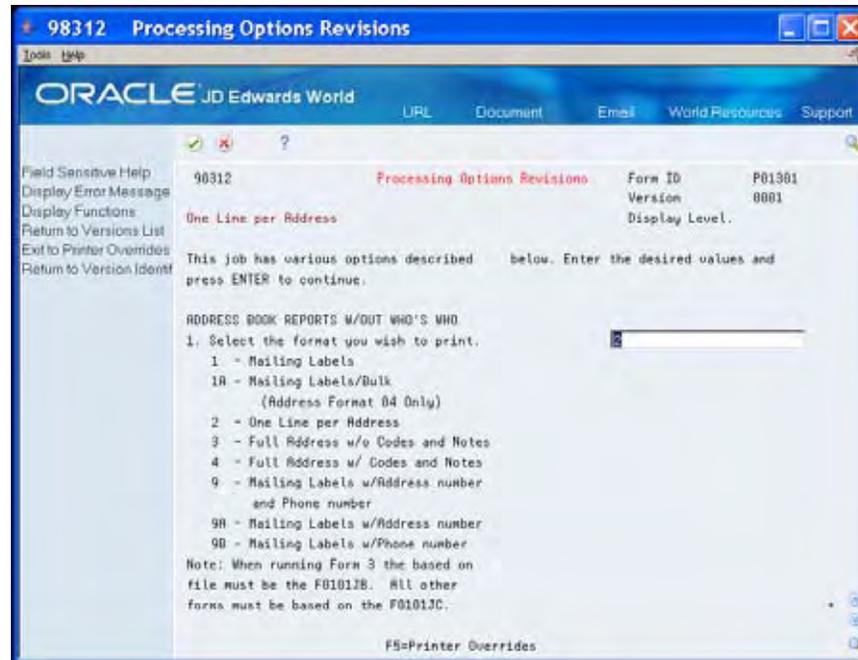
- *Working with DREAM Writer Processing Options Revisions in the Technical Foundation guide*

## Revising Processing Options

You must complete the processing options to create your report version. Processing options determine the format of the printed copy of your version. Any changes you make on a version affect all users.

### To revise processing options

1. On Processing Options Revisions, enter the appropriate changes.

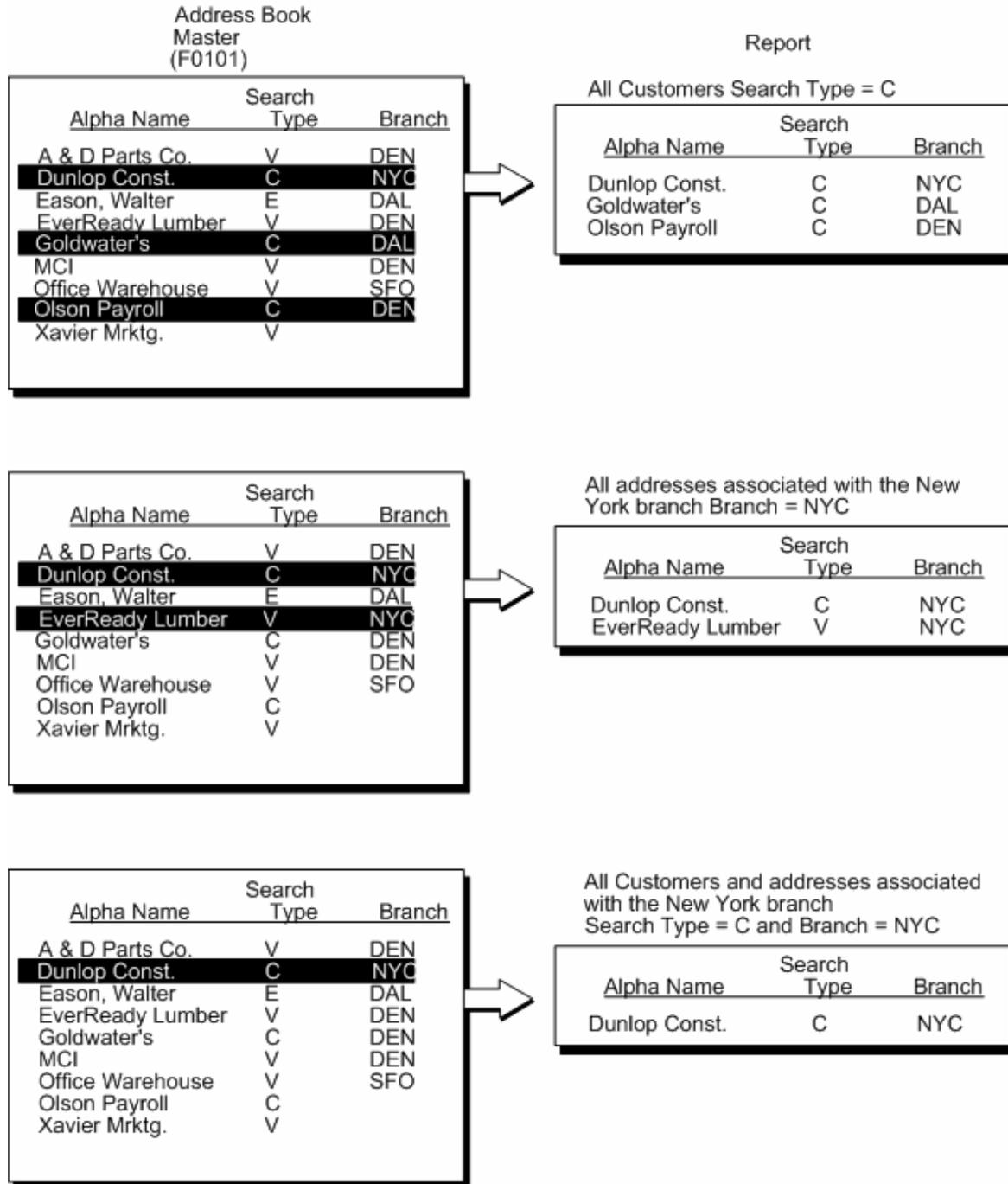


2. Perform one of the following to view more processing options:
  - Use the Page Up and Page Down keys
  - Click the up and down arrows
3. Press Enter to confirm the information and to move on to the next step of DREAM Writer.

## Selecting Your Data

Select the data you want to print on your report. Use a data relationship expression and And/Or logic to determine the parameters of the data in your version. The And/Or field is available in the hidden detail area. To determine which records to include, use the \*VALUE and \*RANGE commands to select a series of data items within a certain limit. If you do not choose any data to define the boundaries of your version, the report will print every record.

The following example portrays reports that show various relationships between search criteria.

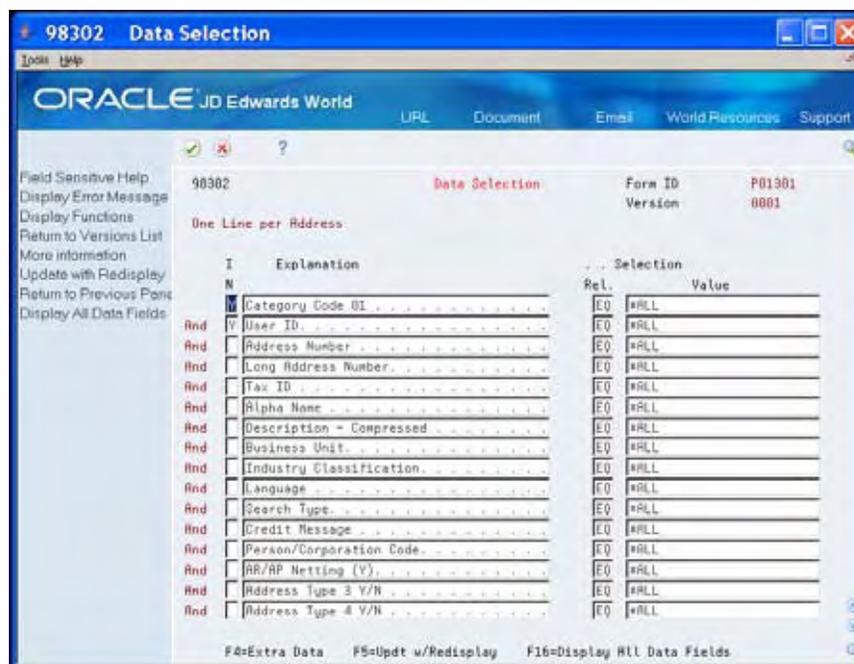


To select your data, complete the following tasks:

- Select your data
- Determine data for \*VALUE
- Determine data for \*RANGE
- Specify hidden criteria

## To select your data

1. On Data Selection, choose Display All Data Fields (F16) to display a full list of data items.
2. If necessary, change the following fields:
  - IN (Include in Selection)
  - Selection Rel. (Relationship)
  - Selection Value



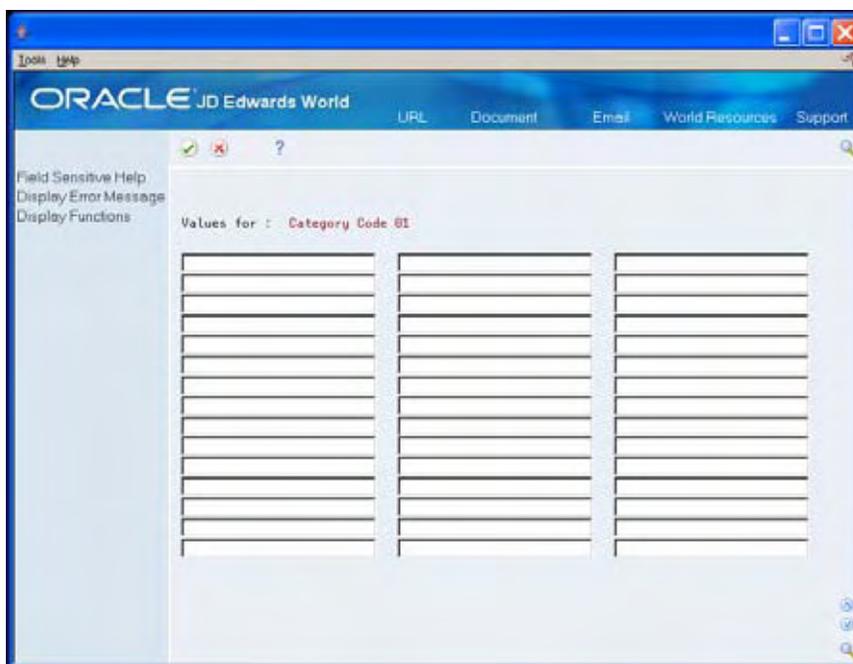
3. Perform one of the following to view all data items.
  - Use the Page Up and Page Down keys
  - Click the up and down arrows
4. Choose Update with Redisplay (F5) to update selections.

Field	Explanation
IN	A code used to designate whether a data item may optionally be selected by the user. <i>Screen-specific information</i> Specifies whether to use the data field as part of the selection criteria.
Y	Includes the field as part of the selection criteria.
N	Deselects a field that was previously selected.
blank	Not included in the selection.

Field	Explanation
Selection Rel	<p>A code that indicates the relationship between the range of variances that you display. Valid codes are:</p> <p>EQ Equal to</p> <p>LT Less than</p> <p>LE Less than or equal to</p> <p>GT Greater than</p> <p>GE Greater than or equal to</p> <p>NE Not equal to</p> <p>NL Not less than</p> <p>NG Not greater than</p> <p>CT Contains (only allowed in selection for Open Query File function)</p> <p>CU Same as "CT" but converts all input data to uppercase letters</p> <p style="text-align: center;"><i>Screen-specific information</i></p> <p>For Configuration Management, you cannot use codes CT and CU.</p> <p>The NE operand must appear first in the selection criteria if you are using NE with the *RANGE or *VALUE parameters and File Output Type is a standard logical file.</p>
Value	<p>The data selection value. A special facility has been provided to allow selection of multiple specific values. By entering '*VALUES' in the selection field, a special display screen will be displayed allowing the entry of up to 45 specific values. If you specify '*VALUES' in multiple selections of the original display, you will be prompted for multiple values lists.</p> <p>Enter the value '*BLANKS' if you are searching on a blank value. You cannot leave the values field blank to search on blanks, it will default to '*ALL'. Enter the value '*ZEROS' when searching for amounts equal to zero.</p> <p>The '*RANGE' keyword will display a special display screen which will allow the entry of a range of values (i.e., from 1 to 50). The first value MUST be LESS than the second value. If it is equal or greater than, it will not work.</p> <p>If you want to select all values for a field, enter '*ALL'.</p>

## To determine data for \*VALUE

1. On Data Selection, type \*VALUE in the following field.
  - Value
2. Press Enter to access the Values screen.



3. Enter the user defined code for each value you want to include for \*VALUE.

---

**Note:** You can not use F1 on the Values screen.

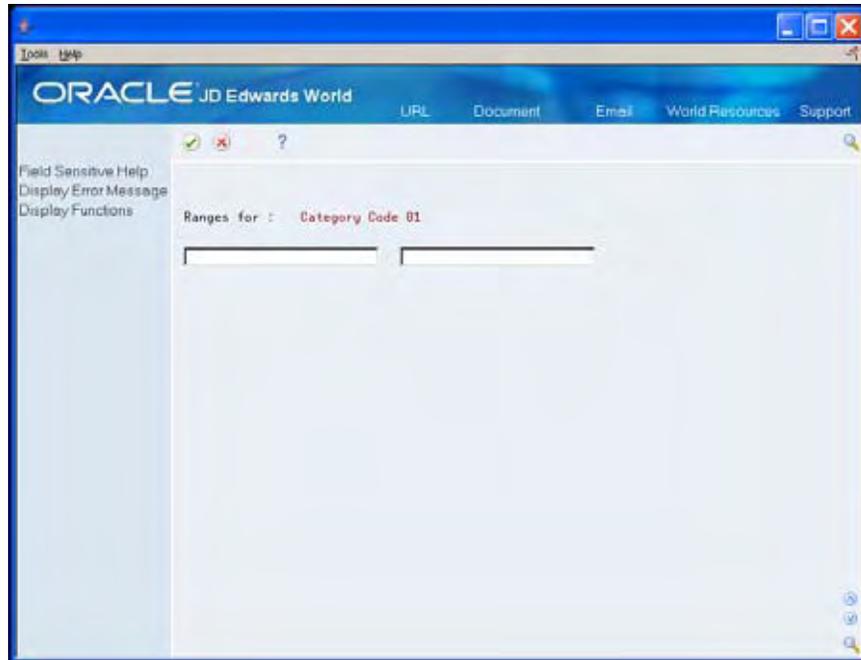
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## What You Should Know About

Valid Values	Description
<b>Displaying a list of valid values</b>	Choose Prompt for valid field values (F1) in the Value field on the Data Selection screen to display a list of user defined codes from which to choose the values to include in your version.

### To determine data for \*RANGE

1. On Data Selection, type \*RANGE in the Value field.
2. Press Enter to access the Ranges screen.



3. Enter the limits for your range.

---

**Note:** You can not use F1 on the Ranges screen.

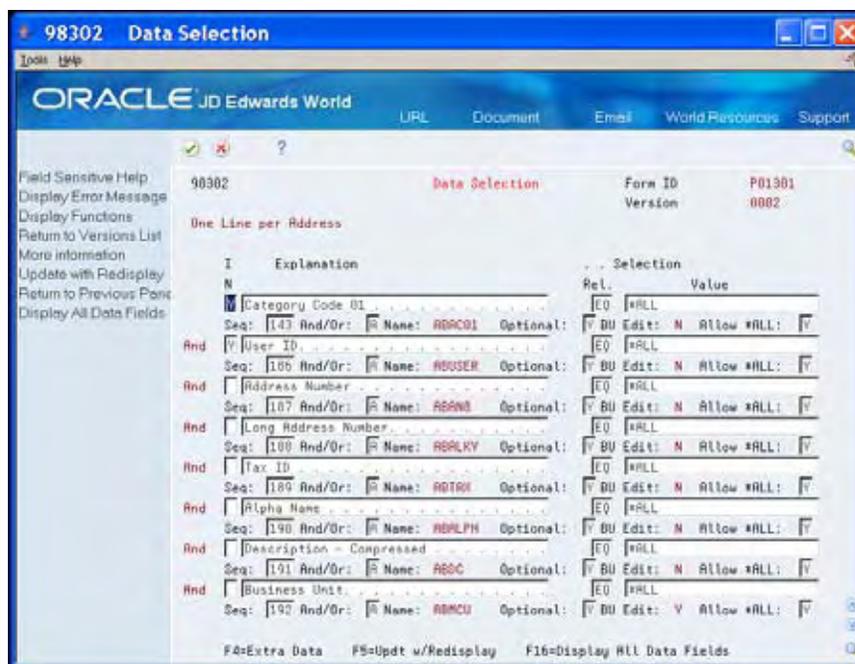
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## What You Should Know About

Valid Values	Description
<b>Displaying a list of valid values</b>	Choose Prompt for valid field values (F1) in the Value field on the Data Selection screen to display a list of user defined codes from which to choose the values to include in your version.

### To specify hidden criteria

1. On Data Selection, choose More Information (F4) to access the detail area.



2. Complete the following optional fields:

- Sequence
- And/Or
- Allow \*ALL

3. Press Enter to confirm the information and to move on to the next step of DREAM Writer.

Field	Explanation
Seq:	<p>This number is used to control the sequence of Processing Options, DDS Selection values and DDS Key sequences.</p> <p>The sequence number is relative, meaning that the sequence need not start 001, 002, etc. A sequence of 003 and 005 sorts the report with the 003 field before the 005 field.</p> <p>For Financial Reports, company MUST be sequence 001 in order to access the specific company Automatic Accounting Instruction (AAI) records. If company is not sequence 001, company 00000 AAIs are used.</p>
And/Or:	<p>A code that determines whether compound data selection logic is based on an A = AND condition or an O = OR condition.</p> <p style="text-align: center;"><i>Screen-specific information</i></p> <p>For valid codes for DREAM Writer Data Selection are:</p> <p>A    And</p> <p>O    Or</p>

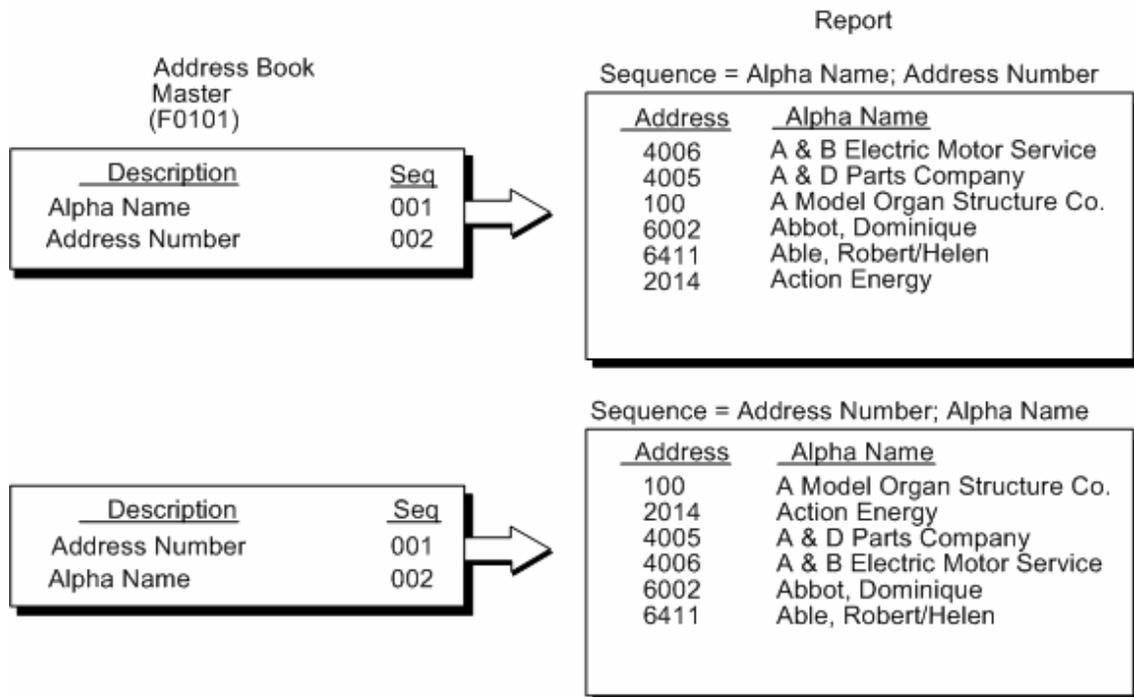
Field	Explanation
Allow *ALL:	This code is used to indicate to the DDS Generator whether or not a value of *ALL is allowed for this selection.

## Arranging Data in Sequence

When you sequence data, you avoid confusion by presenting your information in a clear, logical manner. In the following example, the report lines are listed in alphabetical order by name.

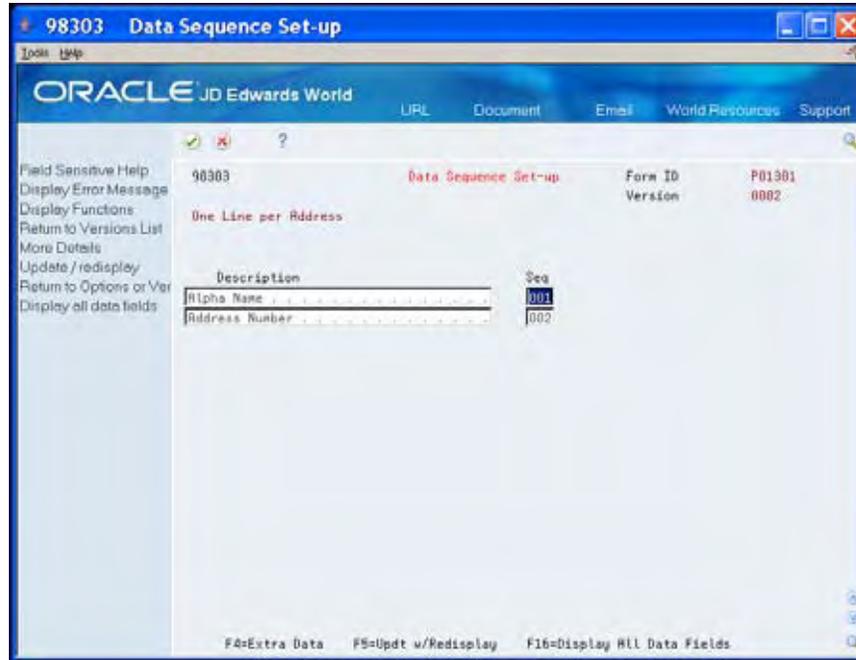
Address	Name	Phone	Line 2	Line 3
4006	A & B Electric Motor Service	(303) 722-5754	3080 Walnut St.	Denver
4005	A & D Parts Company	(303) 555-1100	5025 Colorado Parkway	Denver
100	A Model Organ Structure Co.	(303) 744-7554	2455 Market St.	Denver
6002	Abbot, Dominique	(303) 753-5608	1407 W. Chenango	Englewood
6411	Able, Robert/Helen	(303) 644-1101	Dublin Apts./Gateway	Littleton
2014	Action Energy	(303) 922-6161	1924 S. Navajo St.	Denver

Use the Data Sequence Setup screen to determine the order in which records appear on the report. For example, to list each data item in a report in alphabetical order, choose Alpha Name to be first in sequence. If you would like to display data items in order of address number, choose Address Number to be first. The following graphic displays samples with alternate data sequences:



## To arrange data in sequence

1. On Data Sequence Setup, for each data item, complete the following field:
  - Sequence



2. Press Enter to return to the versions list.

## What You Should Know About

Data Sequence	Description
<b>Changing the sequence of data</b>	Some reports contain a built-in sequence. If you change the sequence on such a report, you might receive unpredictable results. This is especially true when running batch jobs that update files. To determine if you should not change the data sequencing, review the online help.



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# Work with Print Options

## Working with Printing Options

You can set the print options for a specific version. You can also change these options for specific versions or change them for only one instance.

To work with printing options, complete the following tasks:

- [Defining Print Requirements](#)
- [Defining a Report Routing List](#)

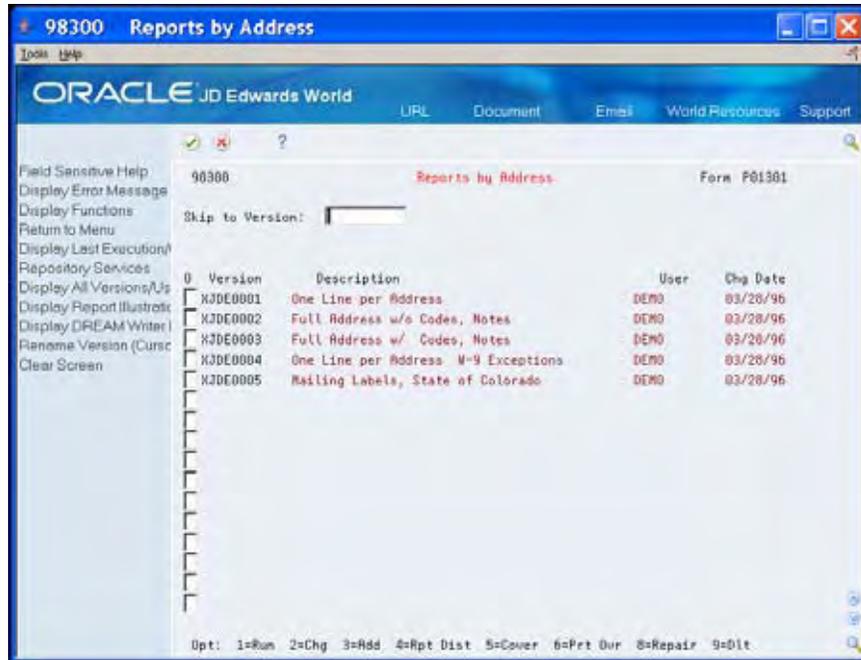
## Defining Print Requirements

Access the Printer File Overrides screen to control the format of a report and the printer from which a report prints.

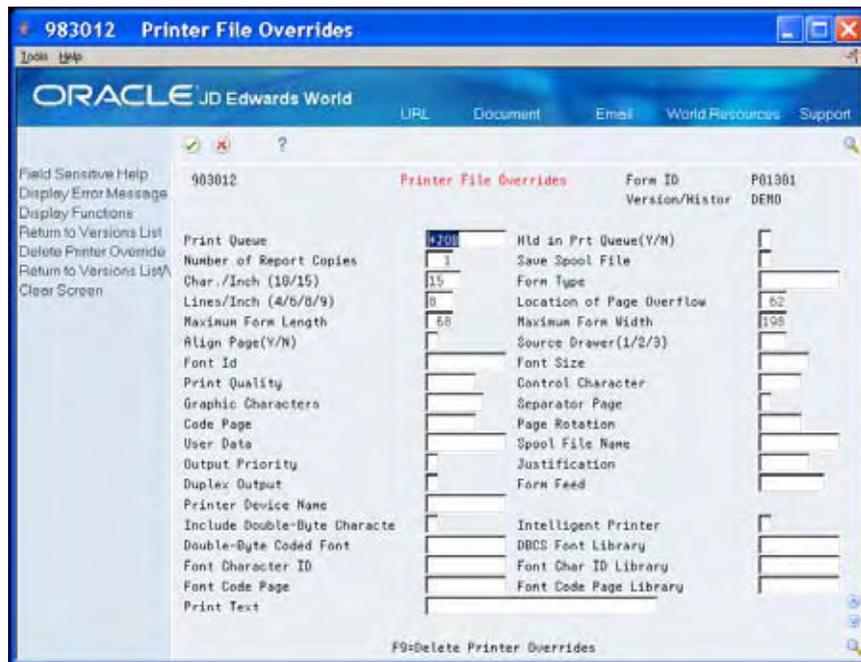
### To define print requirements

	From Address Book (G01), choose <b>Report and Labels</b> From Periodic Processes (G121), choose <b>Reports by Address</b>
---	--

1. On any versions list, enter 6 in the Option (O) field for the version you want to change.



Printer File Overrides displays.



2. On Printer File Overrides, complete one or more of the following optional fields:

- Print Queue
- Hold on Print Queue
- Number of Report Copies
- Save Spool File

- Characters Per Inch
- Form Type
- Lines Per Inch
- Location of Page Overflow
- Maximum Form Length
- Maximum Form Width
- Print Text

Field	Explanation
Print Queue	A designation of a specific print queue, such as QPRINT. If left blank, this field defaults to the print queue specified in your user profile.
Hld in Prt Queue(Y/N)	This flag is used to determine whether to hold the print file in the print queue rather than printing it. Valid values are: Y     hold on the print queue N     do not hold on the print queue S     same as Y but print file will be saved on the print queue T     same as N but print file will be saved on the print queue  <b>Note:</b> You can use 1 for Y and 0 (zero) for N. UPGRADE PLANNER: If you are entering information into your Upgrade Plan, the following values are valid: 1     hold on print queue 0     do not hold on the print queue
Number of Report Copies	The number of copies of this report to be printed. One copy is the default.
Save Spool File	Indicates whether the spool file should be set to a SAV status after printing.
Char./Inch (10/15)	The horizontal printing density. This should be entered as the number of characters per inch and must be supported by your printer.
Form Type	A field used in the definition of a report version used to indicate the special forms number to be used in the printing of a particular report.

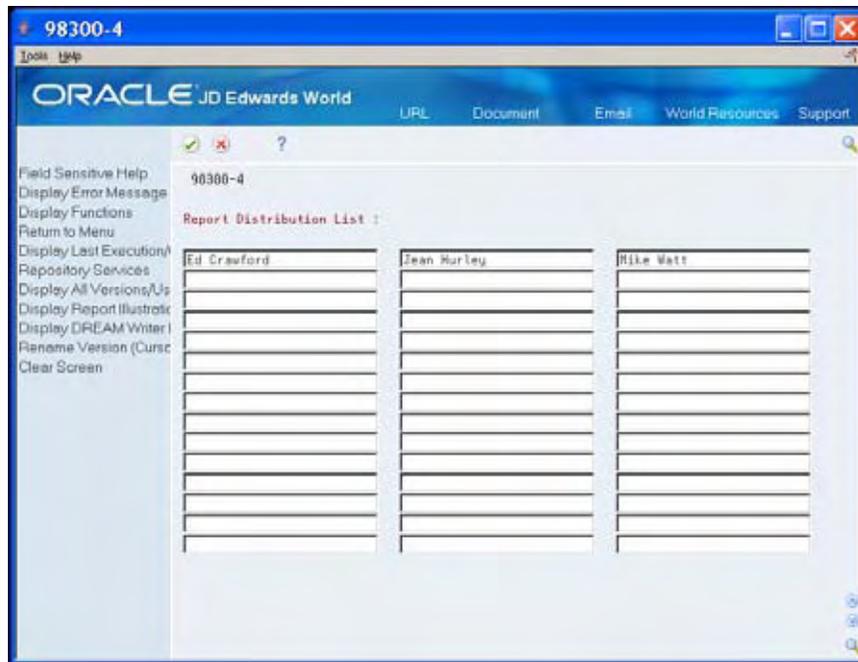
Field	Explanation
Lines/Inch (4/6/8/9)	<p>The line spacing should be entered as the number of lines per inch and must be supported by your printer. The valid values are:</p> <p>4 IBM 5219, 5224, 5225, and 3287 printers only</p> <p>6 IBM 5224 printer only</p> <p>8 IBM 5224 printer only</p> <p>9 IBM 5225 printer only</p> <p>The standard computer print is 6 LPI and 10 CPI. If you are printing on 8 1/2" x 11" paper, you would specify 8 LPI and 15 CPI.</p>
Location of Page Overflow	A field used in the definition of a report version to indicate the number of lines to be printed on a specific form before page overflow is detected.
Maximum Form Length	A field used in the definition of a report version to indicate the length of the form on which the requested report is to be printed. This is expressed in lines per page.
Maximum Form Width	<p>A field used in the definition of a report version used to indicate the width of the form on which the requested report is to be printed.</p> <p>The standard form width is 132 characters. If more than 132 characters are specified, you must compress printing to 15 characters per inch.</p>
Print Text	The Print Text field specifies a character string that will be printed at the bottom of each page of the specified report. A maximum of 30 characters are allowed. Refer to "PRTTXT" keyword of the "OVRPRTF" command on the AS/400.

## Defining a Report Routing List

You can identify people you want to receive a copy of your report. If you included a cover page, the list of recipients prints on the cover page of your printed report.

### To define your report routing list

1. On the versions list, enter 4 in the Option (O) field in front of your version.



2. On Report Distribution List, enter the names of people you want to receive the report.

## See Also

- *Revising Parameters* for information on how to include a cover page on your report version.



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# Work with DREAM Writer Versions

## Working with DREAM Writer Versions

You can submit any version for processing. You must change or create a new version when none of the existing versions meet your business needs.

When you copy or add a version, you define the new version on the same series of screens you use to change a version. You can specify an unlimited number of versions or variations of most reports in the system.

To work with versions, complete the following tasks:

- [Submitting a Version](#)
- [Changing an Existing Version](#)
- [Adding a New Version](#)
- [Deleting a Version](#)
- [Renaming a Version](#)
- [Reviewing the Version Specifications](#)

## Submitting a Version

When you want to print a report, you must submit, or run, a version for processing. Once you create a new version, you can submit it without repeating any of the other tasks. Most users will submit a version that already exists.

### To submit a version

	From Address Book (G01), choose <b>Report and Labels</b> From Periodic Processes (G121), choose <b>Reports by Address</b>
---	--

1. On the versions list, enter 1 in the Option (O) field for the version you want to submit.  
  
If you set the mandatory processing options feature, Processing Options Revisions displays.
2. Review and, if necessary, modify the processing options.
3. Press Enter to submit the job.

## What You Should Know About

Printing	Description
<b>Print requirements</b>	If Processing Options Revisions displays, you can also choose to override the print file information. Choose Printer Overrides (F5) to access Printer File Overrides.

## See Also

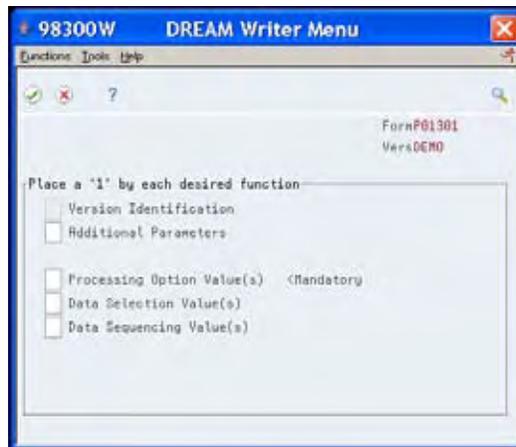
- *Defining a Report Routing List*

## Changing an Existing Version

When you change a version, the system displays the DREAM Writer Menu window. DREAM Writer Menu offers the list of steps in the DREAM Writer program. From this menu, choose any number of the five steps to review at one time.

### To change an existing version

1. On the versions list, enter 2 in the Option (O) field for the version you want to change.



2. On DREAM Writer Menu, enter 1 in front of the step you want to change.

## Adding a New Version

Only experienced users should add a new version with this method. Practice copying existing versions before you attempt to add a new version.

### To add a new version

1. On the versions list, enter 3 in the Option (O) field on a blank line.

2. Follow the steps of DREAM Writer.

## See Also

- *Creating a Version.*

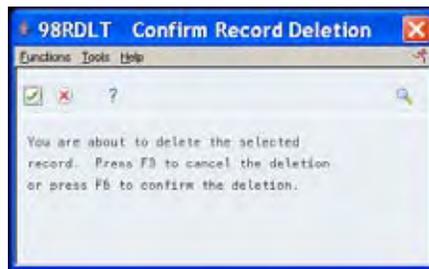
## Deleting a Version

Ensure that you select the correct version to delete. You cannot retrieve a version you delete.

### To delete a version

On the versions list, enter 9 in the Option (O) field of the version you want to delete.

The system prompts you to confirm the deletion.



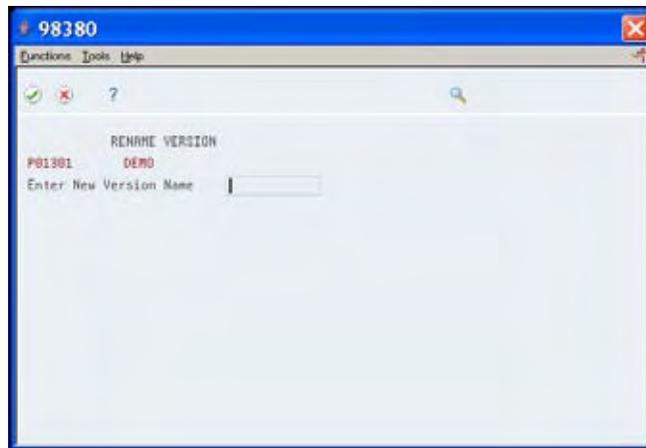
The versions list redisplay without the version.

## Renaming a Version

You can change the current name for any version. When you rename a version, all other specifications for the version remain intact.

### To rename a version

1. On any versions list, click anywhere on the line that contains the version you want to rename and choose Rename Version (F16).



2. On Rename Version, complete the following field:
  - Enter New Version Name

## Reviewing the Version Specifications

Occasionally, you might want to review the version settings to determine if it meets your current business needs. If you choose to change or copy an existing version you might inadvertently change settings that you did not want to change.

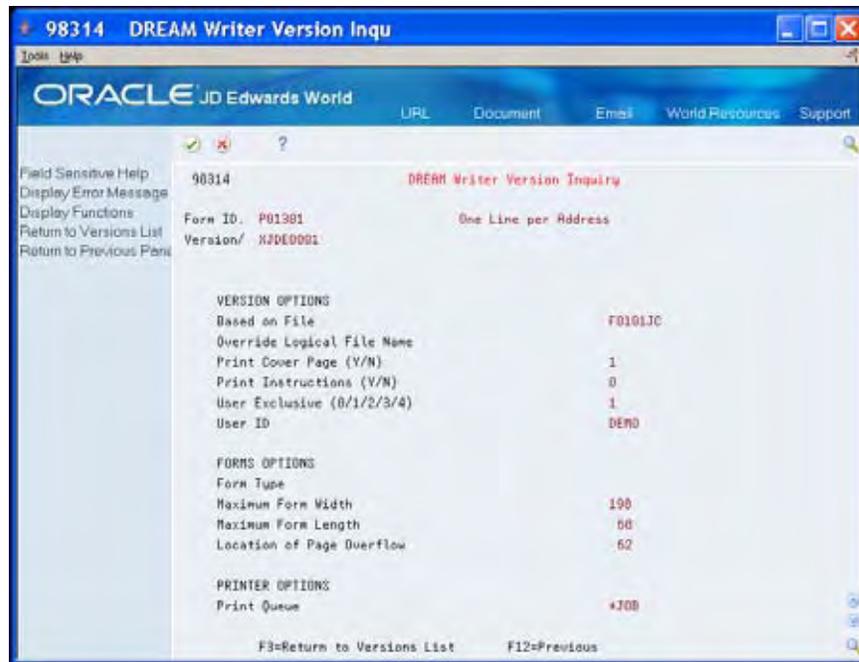
The Cover option allows you to review all the specifications including:

- Processing options
- Data selection
- Data sequencing

If you want to change any of the specifications, you must return to the version list and choose the change option. You cannot make any changes with the cover option.

### To review the version specifications

1. On any versions list, enter 5 in the Option (O) field of the version you want to review.



2. On DREAM Writer Version Inquiry, perform one of the following to view the entire list of specifications:
  - Use the Page Up and Page Down keys
  - Click the up and down arrows



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# Work with Submitted Reports

## Working with Submitted Reports

To learn the status of a report you submit, you can view your job in the system queues.

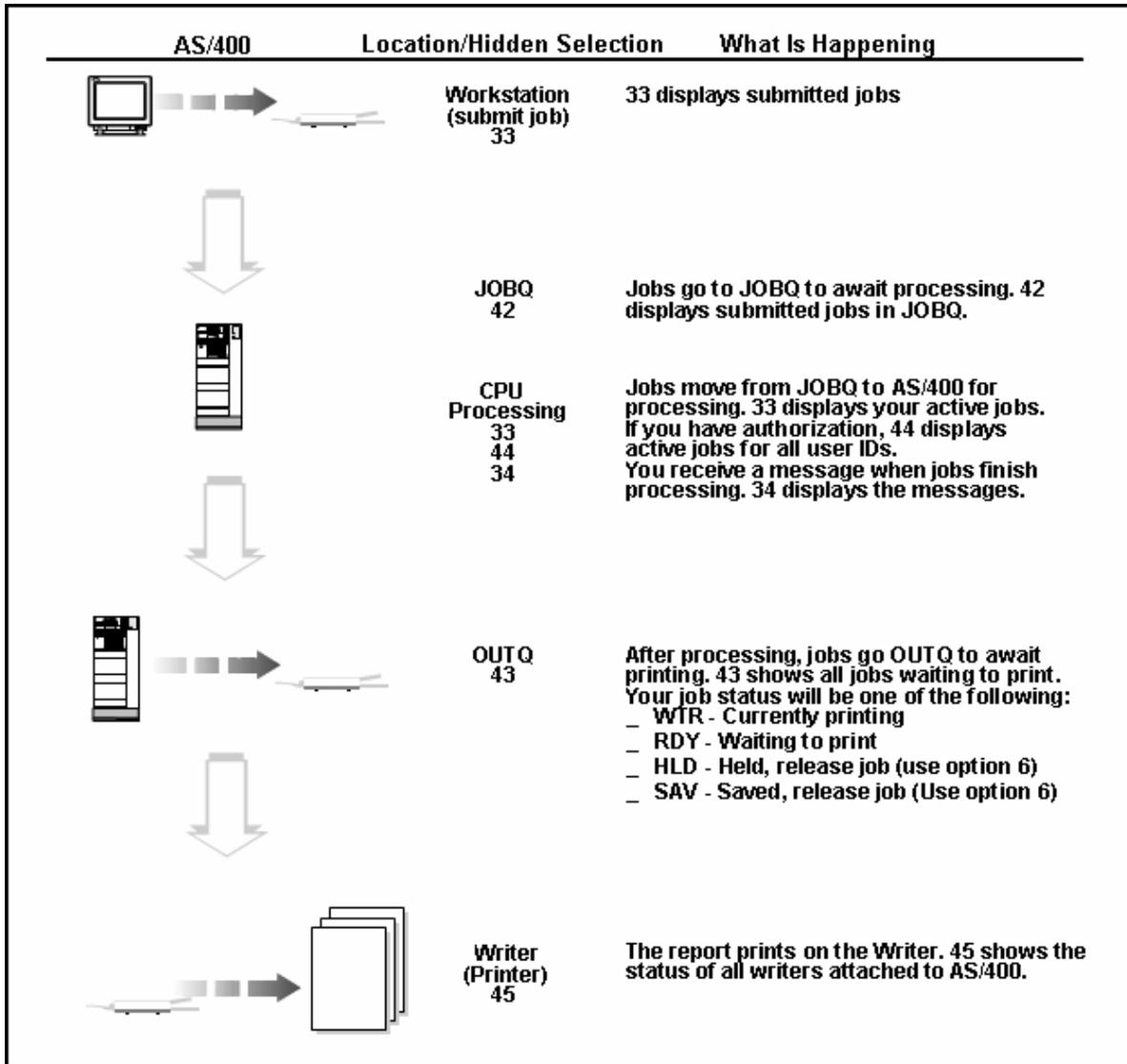
Complete the following:

- [Reviewing Submitted Jobs](#)
- [Reviewing the Job Queue](#)
- [Printing from the Output Queue](#)
- [Reviewing Your Messages](#)

When you submit your report version, the report passes through the following queues:

- Job queue
- Output queue

The job queue is the area where your report awaits processing by the system. When the system finishes processing your report, the job moves to the output queue. Your report prints from this queue.



## Reviewing Submitted Jobs

All the jobs you have submitted for processing display on Work with Submitted Jobs. You can review a job after you send it to the output queue on Work with Job Spooled Files. If you do not know the name of the job, you can use a word or character string to locate a spooled file.

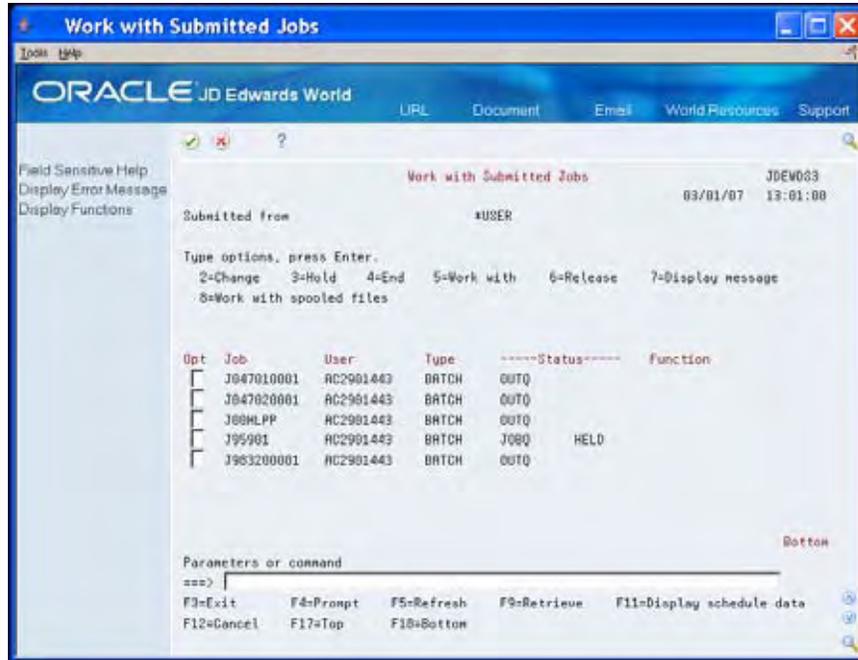
Complete the following tasks:

- To review submitted jobs
- To review a processed report
- To search with the Find field

## To review submitted jobs

1. On the command line on any menu, enter 33.

Work with Submitted Jobs displays.



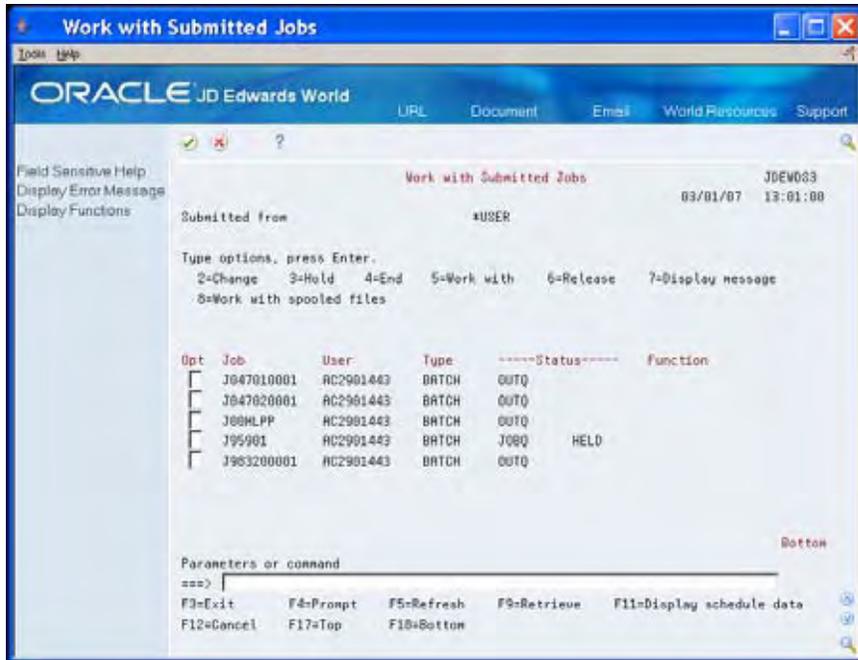
2. On Work with Submitted Jobs, locate your job and view the status information.

Field	Explanation
Job	The simple name of the job, or the JD Edwards World job number.
User	Your user ID
Type	The type of the job. Valid types are: <ul style="list-style-type: none"> <li>▪ Batch</li> <li>▪ Batch1: Batch immediately</li> <li>▪ MRT: Multiple Requester Terminal</li> </ul>

Field	Explanation
Status	<p>The status of the job (in two fields). Valid values for the first field are:</p> <ul style="list-style-type: none"> <li>▪ Active: The job has been started and is processing.</li> <li>▪ OUTQ: The job has completed running and has spooled files. You can view them on an output queue.</li> <li>▪ DSC: The job is disconnected.</li> <li>▪ JOBQ: The job is on a job queue, but not as a result of a Transfer Job (TRFJOB) or Transfer Batch Job (TRFRBCH) command.</li> <li>▪ TRFJOB: The job is on a job queue as the result of a Transfer Job command.</li> <li>▪ TTRFRBCH: The job is on a job queue as the result of a Transfer Batch command.</li> <li>▪ FIN: The job has finished.</li> <li>▪ END: The job is ending as the result of the End Job or the End Subsystem command, either with the immediate option or with the controlled option which causes the job to end when the delay time expires.</li> <li>▪ EOJ: The job is ending for any reason other than End Job or End Subsystem. For example, normal end of job or an exception that is not being handled.</li> <li>▪ MSGW: The job has a message waiting.</li> <li>▪ SCD: The job is scheduled for a particular date and time.</li> </ul> <p>The second field indicates whether the job is being held or not held. The field is blank if the job is not being held.</p> <p>If the system failed while the job was active, the status JOBLOG PENDING is show in the two fields until the job log is written.</p>

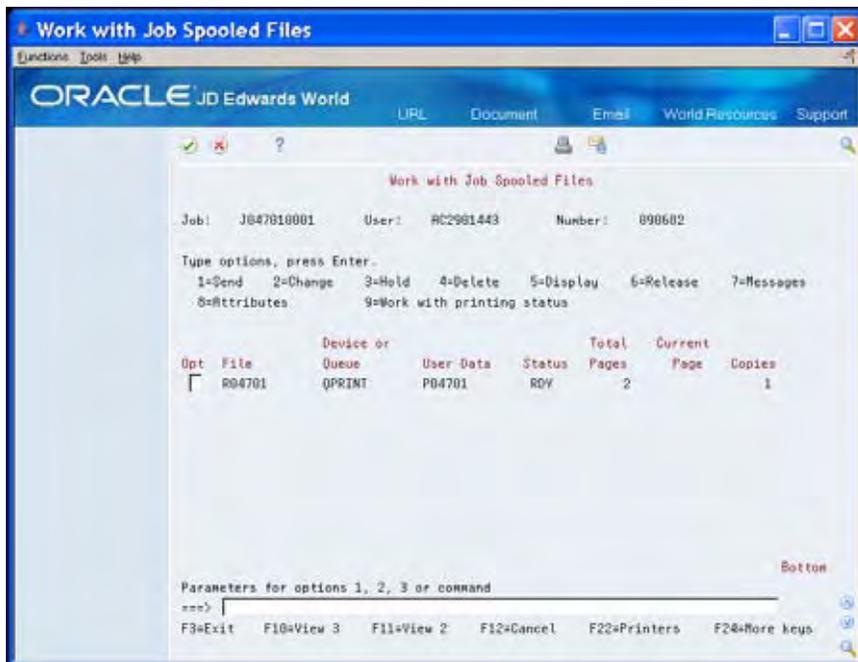
## To review a processed report

1. On Work with Submitted Jobs, enter 8 in the Option (Opt) field in front of your completed job.

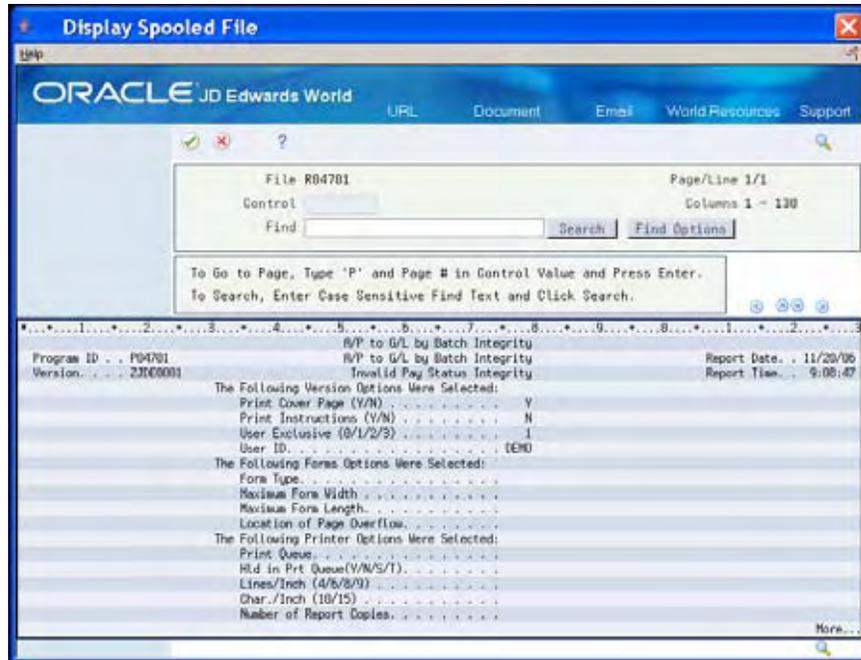


- On Work with Job Spooled Files, enter 5 in the Option (Opt) field in front of the pool file you want to display.

You can have more than one spool file. For example, if you select a cover page for your report, the processed report and the cover page display on the Work with Job Spooled Files screen.



The report displays.

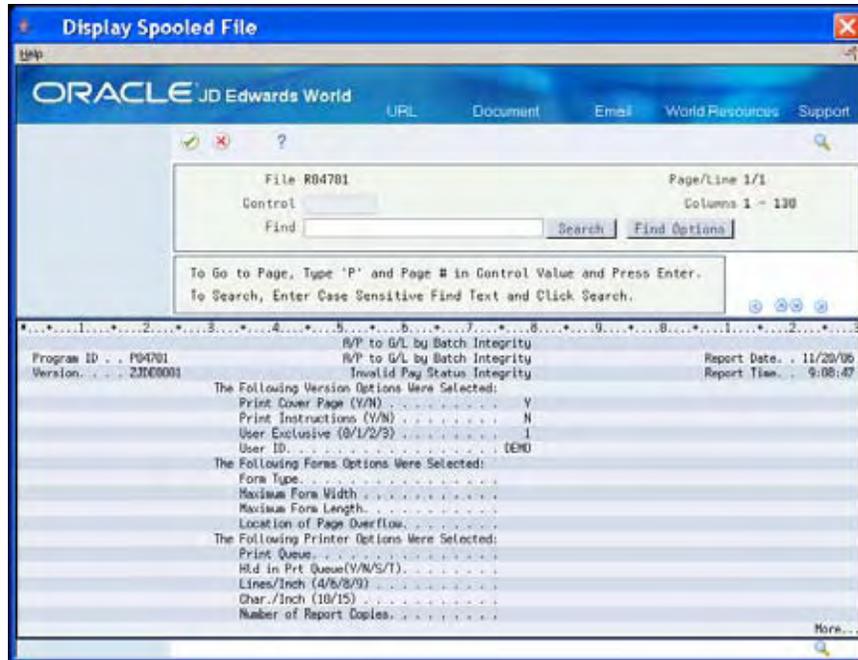


3. Perform one of the following to view more of the report.
  - Use the Page Up and Page Down keys
  - Click the up and down arrows
  - Click the left (F19) and right (F20) arrows to view the right and left portions of the report

Field	Explanation
Control	<p>Used to access specific pages of the spooled file displayed or to window to a specific column. Enter a specific page number or use the + / - signs.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>▪ P4 to display page four</li> <li>▪ P+2 to advance two pages</li> </ul> <p>Enter a specific column number to move to if known or use the + / - signs.</p> <p>For example:</p> <ul style="list-style-type: none"> <li>▪ W35 to move the left margin to column 35 for viewing purposes</li> <li>▪ W+40 to move the left column forty spaces to the right</li> </ul>

### To search with the Find field

1. On Display Spooled Files, type a search topic in the following field:
  - Find



2. Click Search (F16) to search for the topic.

If the search locates the topic, the screen displays the highlighted word.

Field	Description
Find	<p>Enter the word or character string you wish to find.</p> <ul style="list-style-type: none"> <li>For example: Revenue</li> </ul> <p>Blanks at the end of the character string are ignored. Use quotation marks if blanks are required at the end of a string.</p> <ul style="list-style-type: none"> <li>For example: "Gross__"</li> </ul>

## Reviewing the Job Queue

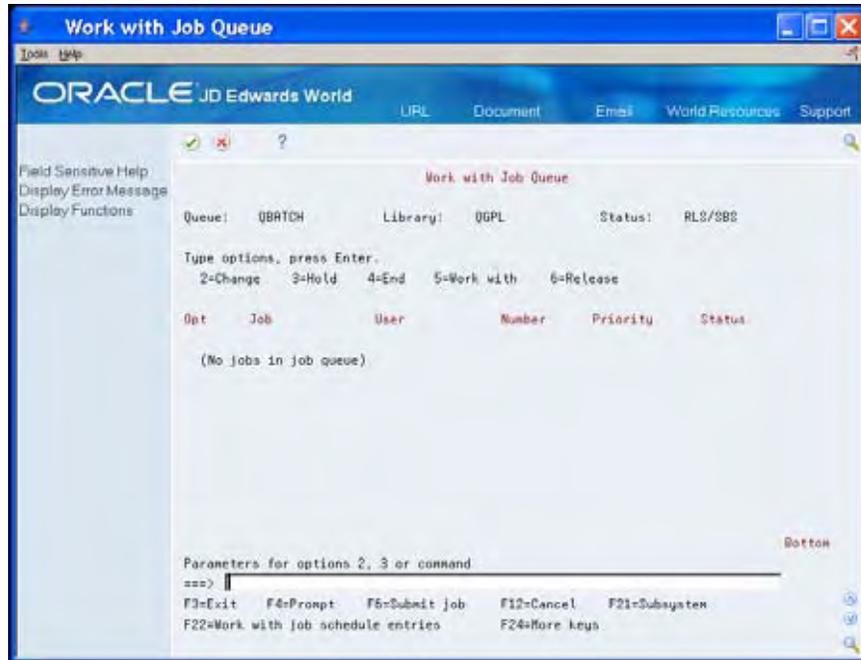
You can view all jobs waiting for processing in a user's assigned job queue. The following considerations apply to the job queue:

- Jobs wait here until the system is able to process them
- Jobs are submitted for processing in the order they appear

### To display the job queue

1. On the command line on any menu, enter 42.

Work with Job Queue displays.



2. On Work with Job Queue, review the information in the following fields:

- Job
- Number
- Priority
- Status

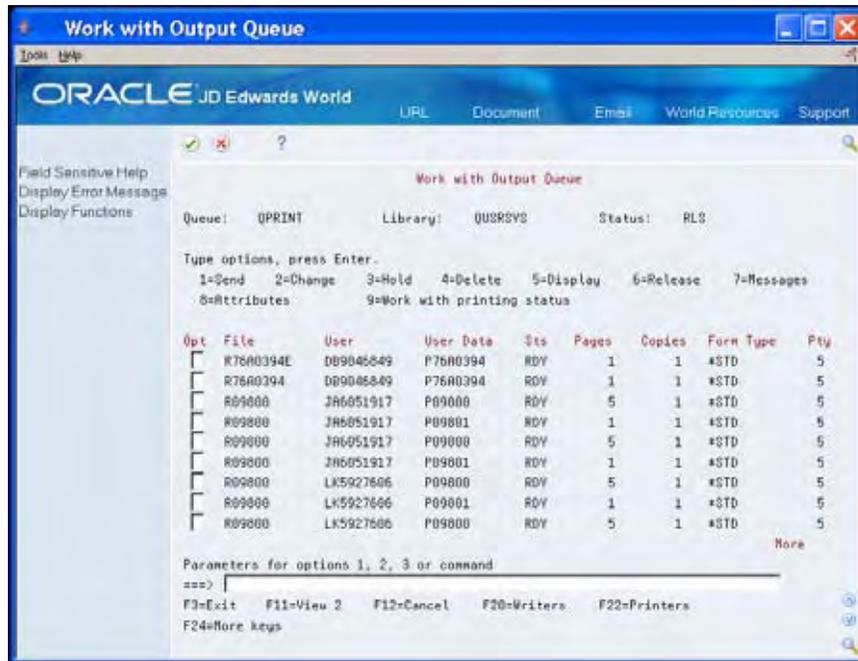
Field	Explanation
Number	The six digit number assigned by the system.
Priority	The job priority that was used for this job. The priority ranges from 0 (highest) to 9 (lowest).
Status	<p>The status of the job. Valid values are:</p> <ul style="list-style-type: none"> <li>▪ SCD: The job will run as scheduled.</li> <li>▪ HLD: The job is being held on the queue.</li> <li>▪ RLS: The job is ready to be selected.</li> </ul> <p>The following status values with a * in front of them display when an action was performed on the job as a result of taking an option:</p> <ul style="list-style-type: none"> <li>▪ *CHG: The job was changed using option 2 (Change).</li> <li>▪ *HLD: The job was held using option 3 (Hold).</li> <li>▪ *END: The job was ended using option 4 (End).</li> <li>▪ *RLS : The job was released using option 6 (Release).</li> </ul>

## Printing from the Output Queue

You can review all the jobs in your assigned output queue. When a report is ready, you can release it to the printer.

### To print from the output queue

1. On any menu, enter 43 in the command line.



2. On Work with Output Queue, review the information in the following fields:
  - File
  - User
  - User Data
  - Status
  - Pages
  - Form Type
  - Priority
3. If the report status is RDY (Ready) enter 6 in the Option (Opt) field to release the report.

Field	Explanation
Status	<p>The status of the spooled file. Valid values are:</p> <ul style="list-style-type: none"><li>RDY: The file is available to be written or printed.</li><li>OPN: The file has not been completely processed and is not ready to be selected by a writer.</li><li>DFR: The file has been deferred from printing.</li><li>SND: The file is being or has been sent to a remote system.</li><li>CLO: The file has been completely processed by a program, but Schedule was specified and the job that produced the file has not yet finished.</li><li>HLD: The file has been held.</li><li>SAV: The file has been written and then saved. This file will remain saved until it is released.</li><li>WTR: This file is currently being written.</li><li>PND: This file is pending to be printed.</li><li>PRT: This file has been completely sent to the printer, but print complete status has not been sent back.</li><li>MSGW: This file has a message which needs a reply or an action to be taken.</li></ul> <p>The following status values with a * in front of them display when an action was performed on the job as a result of taking an option:</p> <ul style="list-style-type: none"><li>*CHG: The job was changed using option 2 (Change).</li><li>*HLD: The job was held using option 3 (Hold).</li><li>*RLS : The job was released using option 6 (Release).</li></ul>
Form Type	The type of form which should be loaded on the printer. For diskette files, this field is blank.

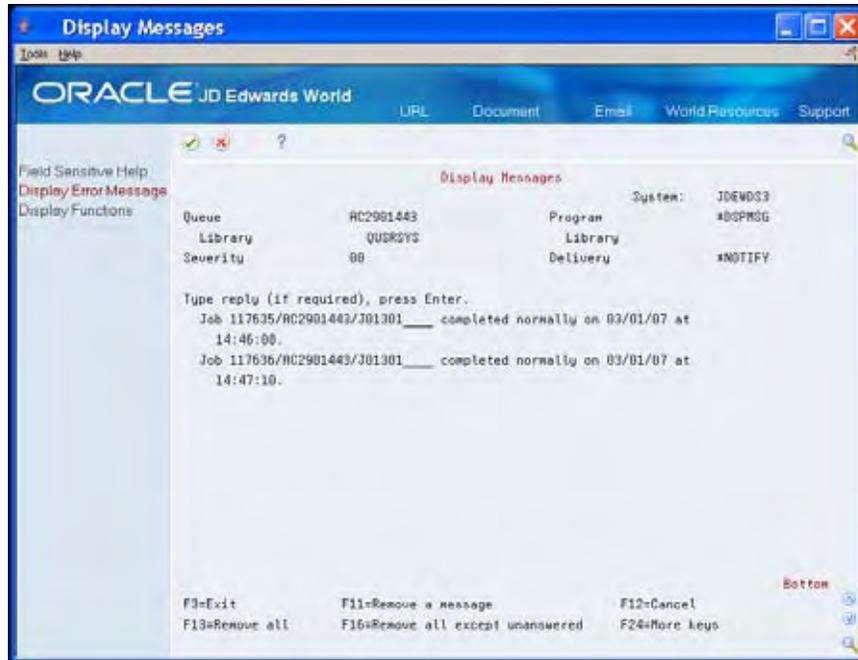
## Reviewing Your Messages

You can display the messages sent to your workstation to notify you of the following:

- When your job has processed
- Special media
- When the printer is offline

### To review your messages

1. On any menu, enter 34 in the command line.



2. On Display Messages, review the messages.
3. To remove a specific message, select the message and press F11.
4. To remove all messages, press F13



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# Work with Output and Job Queues

## Working with Print and Job Queues

You might find it necessary to change your output and job queues.

Working with print and job queues includes the following tasks:

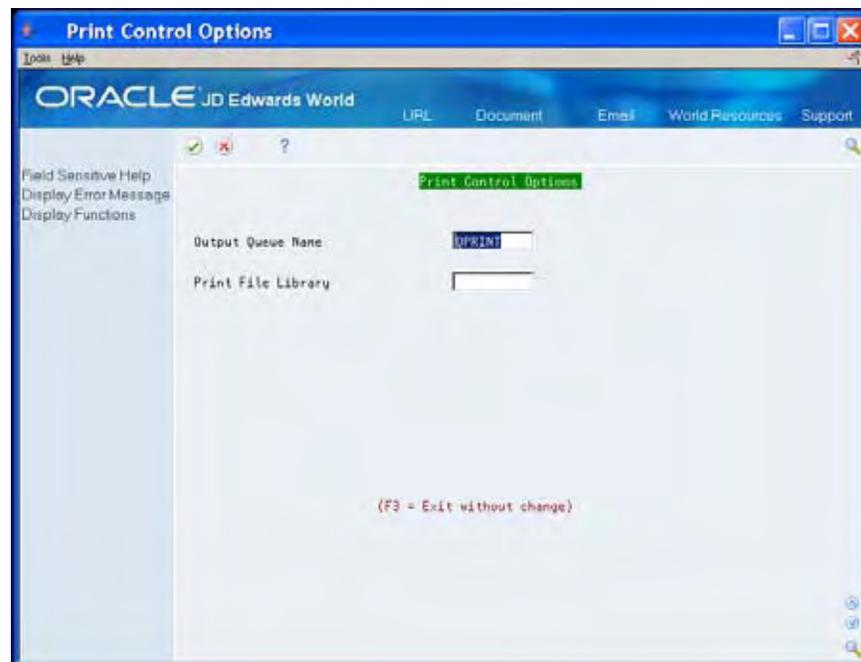
- [Changing Your Output Queue](#)
- [Changing the Job Queue](#)

## Changing Your Output Queue

You can use Hidden Selection 39 to display the name of your assigned or output queue and the name of your active print file library. The output queue identifies the holding area, usually a printer, where the system sends your jobs. You might want to change your output queue so that reports you select print at a different printer location.

### To change your output queue

1. On any menu, enter 39 in the command line.



2. On Print Control Options, complete the following optional fields:
  - Output Queue Name
  - Print File Library

Field	Explanation
Output Queue	The waiting area a job goes to after it has processed. Output Queues are sometimes attached to printers. If an OUTQ is not specified, it defaults from the user's job description.
Object	The name of the object.  Objects can be libraries, source members, job queues, print queues, and files. Consult your IBM documentation for a full explanation of objects.

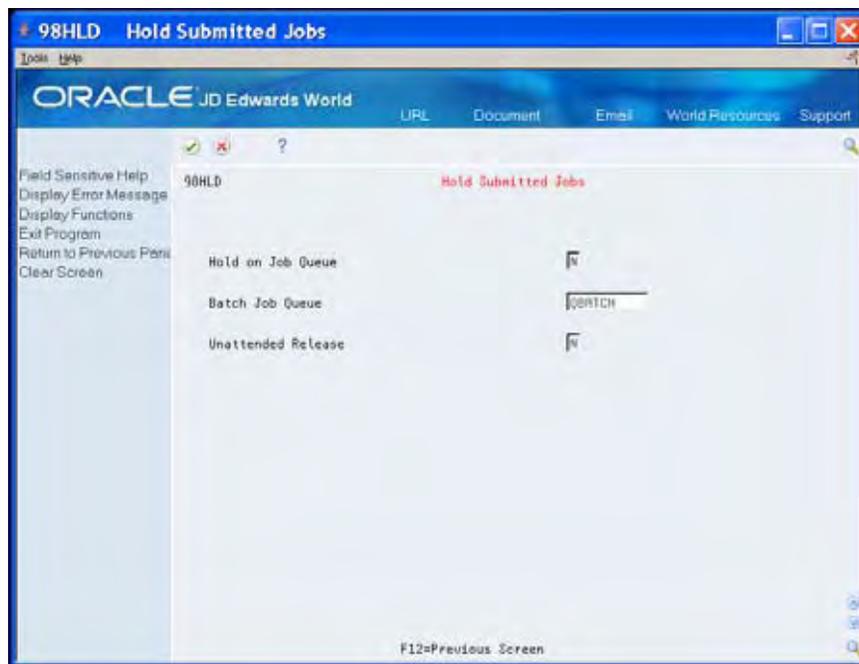
## Changing the Job Queue

You can access your job information to perform the following:

- Hold submitted jobs
- Change your job queue
- Send jobs to the Sleeper system to schedule them for overnight processing

### To hold a submitted job

1. On any menu, enter 82 in the command line.



2. Change any of the following fields:

- Hold on Job Queue
- Batch Job Queue
- Unattended Release

Field	Explanation
Hold on Job Queue	A code used to indicate whether or not to hold the submitted job in the job queue.
	N Will cause submitted jobs not to be placed on hold in the job queue.
	Y Will cause jobs to be placed on hold in the job queue.
Batch Job Queue	The computer waiting line that a particular job passes through. If blank, it defaults to the job queue specified in the user's job description.
Unattended Release	The Unattended Release field specifies for jobs submitted on hold whether they will be manually released or whether at the time of submission to prompt for a time of release by sleeper. This field exists in the local data area and is monitored by all batch submission functions of the menu system.
	N Will cause the submitted jobs not to be released.
	Y Will cause the submitted jobs to be released by the Unattended Operations system.



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## 10 Appendices



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# Appendix A - Functional Servers

## About Functional Servers

Several JD Edwards World programs access functional servers. The purpose of functional servers is to provide a central location for standard business rules about entering documents, such as vouchers, invoices, and journal entries. These business rules establish the following:

- Data dictionary default values
- Field edits and valid values
- Error processing
- Relationships between fields or applications

The advantages of a functional server include:

- Reduced maintenance of entry programs because edit rules reside in one central location.
- Standardized documents across all applications because you create them using the same business rules.
- User interface (appearance and interaction) of a screen is now separate from how a program works.

### To set up business rules for an entry program

1. Create a DREAM Writer version for a specific functional server program (for example, XT0411Z1 for voucher entry).
2. Set the processing options within the version according to your company requirements.
3. Specify the version you want the entry program to use in the processing options for that entry program.

You can have all your entry programs use the same DREAM Writer version (and thus, use the same rules) or you can set up different DREAM Writer versions. JD Edwards World provides DREAM Writer version ZJDE0001 as the default functional server version for your entry programs.

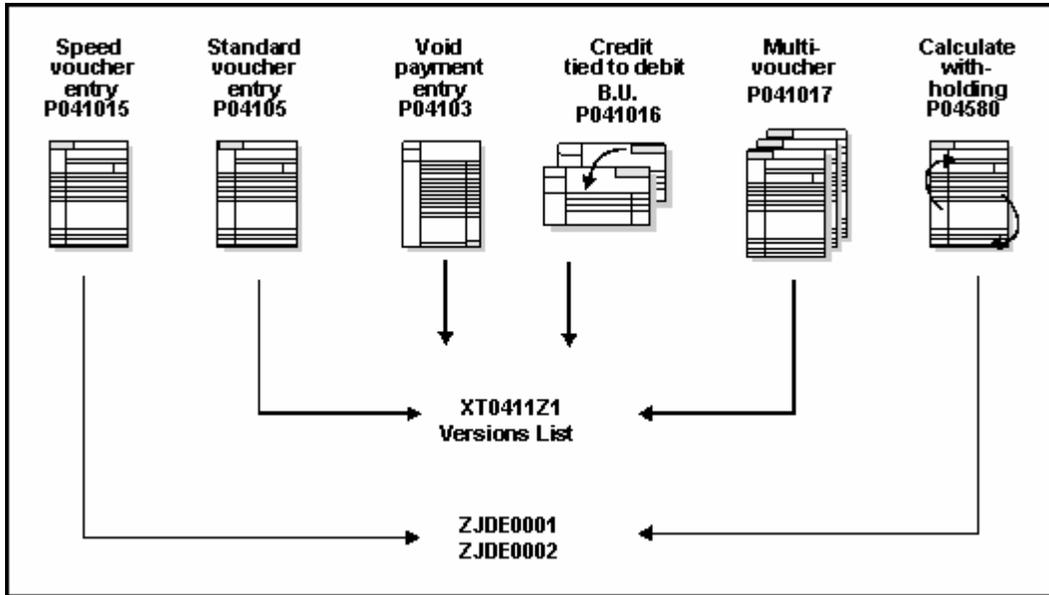
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**Caution:** Only the person responsible for system-wide setup should make changes to the functional server version. For more information about how to set up DREAM Writer versions, see *Understand DREAM Writer* in the *Technical Foundation Guide*.

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## Example: Voucher Processing Functional Server

The following graphic shows the programs that use the voucher processing functional server. JD Edwards World provides two demo versions of the functional server, ZJDE0001 and ZJDE0002.



## A

Accessing fast path commands, 3-19  
Accessing field level help, 6-15  
Accessing hidden menus, 3-19  
Accessing index of menus, 3-19  
Accessing Name Search, 7-10  
    from fields, 6-15  
Accessing program-level help  
    from Menu Word Search, 6-10  
    from menus, 6-10  
    from screens, 6-10  
Accessing programs and screens, 4-12  
Accessing screen detail and other screens, 4-12  
Accessing User Defined Codes Revisions, 8-12  
Action codes, 7-19  
Adding records, 7-19  
Adding user defined codes, 8-12  
Adding user defined text, 6-10  
Adding versions, 9-37  
Additional Parameters screen, 9-25  
Address Book  
    grouping data in, 8-2  
Address Book record  
    searching, 7-10  
Address Book Revisions Help Task List screen  
    accessing from Menu Word Search, 6-10  
    accessing from menus, 6-10  
    accessing from screens, 6-10  
    adding user defined text, 6-10  
    displaying user defined instructions, 6-10  
    printing program-level help, 6-10  
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