



JD EDWARDS ENTERPRISEONE

JD Edwards EnterpriseOne

Tools Release 9.1

Configuration Assistant

User Guide

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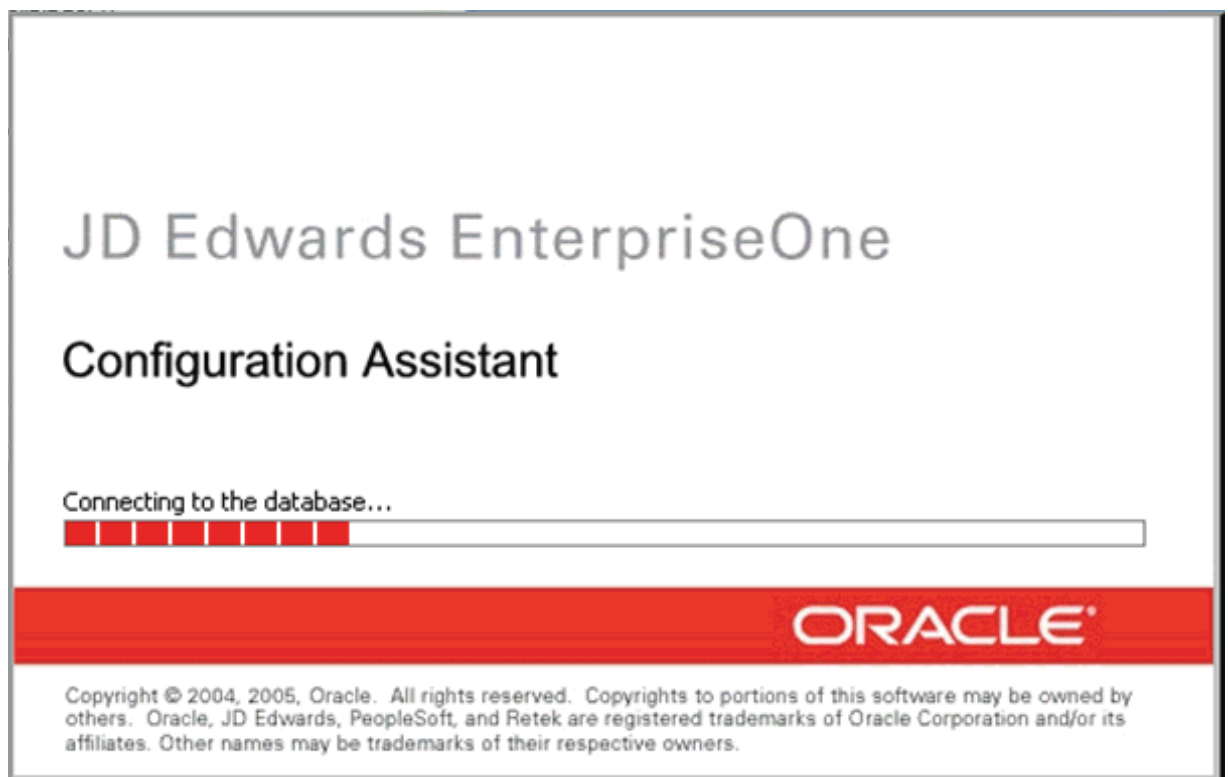
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Welcome to the JD Edwards EnterpriseOne Configuration Assistant

This section describes:

- [Overview](#)
- [News and Links](#)
- [Productivity Hints](#)
- [Manually Creating a Shortcut for Configuration Assistant](#)

Overview



The Configuration Assistant is a standalone Java-based tool that allows you to extract a subset of JD Edwards EnterpriseOne configuration information into a portable archive. This data can then be loaded into any other JD Edwards EnterpriseOne environment using Change Assistant.



Tip

The maximum size of a SQL Server Express (SSE) local database is 4 GB, while there is no limit for an Oracle Enterprise Edition (OEE) local database. As a point of reference, the sample JD Edwards Configurations are typically less than 100 MB.

Beginning in JD Edwards EnterpriseOne Tools Release 8.98, the configuration database is delivered as xml.



Note

JD Edwards EnterpriseOne Compatibility. The Configuration Assistant tool is compatible with JD Edwards EnterpriseOne Applications Release 8.11 SP1 and forward. The tool supports cross release data configuration imports and exports; however it gives a cross release warning.

For a description of how the Configuration Assistant and Change Assistant are used together to create and distribute the configurations, and how specific machine types are required for each function, refer to [Packaging and Loading an Extracted File onto a Target Machine](#).



Warning

Microsoft Windows Server 2008. On the Microsoft Windows 2008 platform, you must start Configuration Assistant using **Run as Administrator**. Right-click on the shortcut and select **Run as Administrator** from the drop-down. For details on creating a shortcut for Configuration Assistant, refer to the section entitled: [Manually Creating a Shortcut for Configuration Assistant](#) at the end of this chapter.



Caution

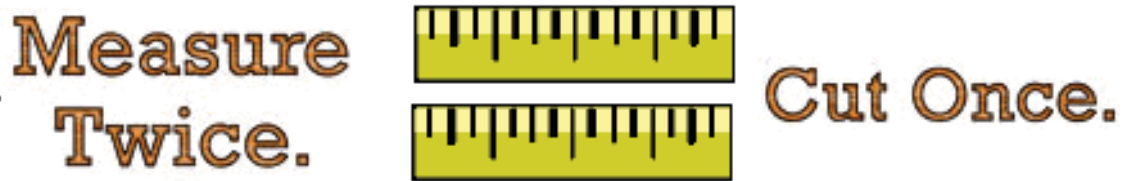
Use careful design analysis as you configure your portable archive in the source environment to ensure that loading it in the target environment (using replace and append) will not cause problems.

When architecting data configurations, you should refer to the *JD Edwards EnterpriseOne Configuration Development Methodology Guide* to ensure that you are adhering to known design constraints and are aware of risks inherent with any data replacement strategy. This guide presents the guidelines you should follow when creating new User Defined Codes (UDCs), Versions, Task Views, or special data types in order to avoid potential conflicts with the base EnterpriseOne data set, and as a result core EnterpriseOne application functionality.

Additionally, you should be aware that some types of configuration data are inherently more risky than others. For example, you should exercise care when dealing with any technical tables such Next Numbers. That is, the system will not execute properly if you include tables associated with Next Numbers, but then fail to take the associated Next Number table.

Further, generally you should not include any Control Tables or serialized object tables in your configuration. That is, you should not include tables from any datasource other than Business Data.

Configuration designers will do well to consider the axiom of trade craftsmen:



The Configuration Assistant is designed to work with these specific types of JD Edwards EnterpriseOne configuration information:

- Tables
- Object Management Workbench (OMW) Projects and OMW Objects (requires JD Edwards Tools Release 8.98 or greater)
- User Defined Codes
- Security (Public, Roles, and Users)
- Tasks Views
- Versions

The user interface for Configuration Assistant includes a main window and two panes. The left pane displays a tree view of work in process and sample JD Edwards EnterpriseOne configurations that are delivered by default. Each configuration node represents the definition of the contents. After you have completed the definition of a configuration, you use a separate step to actually extract the data and create the portable archive.

This Welcome section also describes these topics:

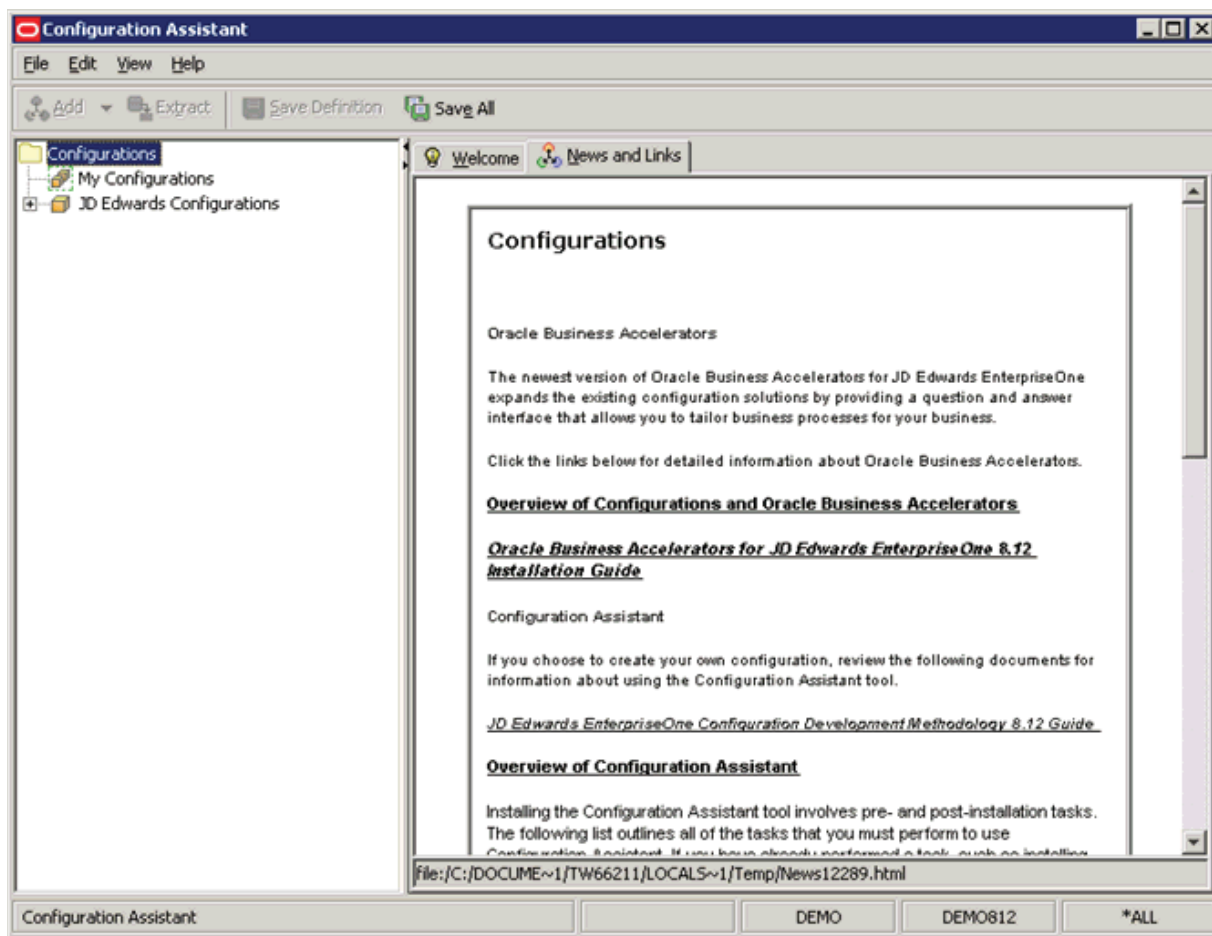
- [Icons Used by Configuration Assistant](#)
- [Productivity Hints](#)

When you start Configuration Assistant, this dialog box appears the first time you start the program or if the program has changed and needs to reload a more current version. The dialog indicates the relative progress of loading the Configuration Assistant Java program:



News and Links

The News and Links tab is available when you select the Configurations node and whenever you are connected to the Update Center (see [Using the Authentication Tab in Using Preferences](#)). This tab displays a replica of the page displayed by the Update Center, which is a companion tool to Configuration Assistant. The page contains links to a variety of collateral information such as known issues and workarounds, breaking news, and tips. The linked information is instrumental to the entire Update Center and Configuration Assistant methodology, design, and end user processes.



Productivity Hints

The Configuration Assistant user interface includes a variety of tools to enhance end user productivity. These include:

- [Adding or Removing Items to Your Configuration](#)
- [Backing Up Your Target Database Environment](#)
- [Edit Functions in Specific Nodes](#)
- [Folder Structure in the Configuration Assistant](#)
- [Help Tab](#)
- [Icons Used by Configuration Assistant](#)
- [Multiple Selects and Deselects](#)
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- [Search Strings - Wild Cards](#)
- [Sorting Within Columns in a Grid](#)
- [Status Bar](#)

Adding or Removing Items to Your Configuration

Whenever you select a check box in the right-hand pane to add an item to your configuration, that item is immediately added to your configuration, as evidenced by the display in the left-hand pane. Likewise, if you clear a check box in the right-hand pane, the item is immediately removed from the configuration and in the left-hand display.

To add or remove an item to your configuration (from the tool-populated list of available tables in this data-source), select the check box to the left of the item name; this is the first column of the table properties grid.

Search Help All Tables					
Tables 3754 of 3754					
	Table	Rows	Load Action	Data Class	Copy Data
<input checked="" type="checkbox"/>	F91014	170790	Replace Tables	T	N
<input checked="" type="checkbox"/>	F00165	120314	Replace Tables	B	N
<input checked="" type="checkbox"/>	F9203	80253	Replace Tables	D	Y
<input checked="" type="checkbox"/>	F9200	77908	Replace Tables	D	Y
<input type="checkbox"/>	F9860	45939		O	Y
<input type="checkbox"/>	F9861	45893		O	Y



Tip

If you remove a configuration node or specific item from the My Configurations tree structure in the left-hand pane, Configuration Assistant automatically clears the corresponding item in the right-hand pane.

Backing Up Your Target Database Environment

You should always back up your target database environment before performing any process that alters the data, including the loading of an extracted configuration that was created using Configuration Assistant. Unless properly designed and tested, it is possible that when you are loading data from a configuration that you might inadvertently overwrite production data.

As shown in the Environment Selection screen below, when you use Change Assistant to deploy an XML package, you can choose to back it up. With the **Backup** option selected, Change Assistant creates a configuration that is a mirror of the configuration being loaded that contains data from the target system. To restore, you can load the backup configuration from Change Assistant.

Environment Selection

OK Cancel

General Notes Help

Batch

ID: Batch1226515033625

Name: Batch (Nov 12, 2008 11:37:13 AM)

Description: Batch created on Deploy

☐ Unattended ☒ Backup

✓ X 1 Package Selected

Select	Environment	Description	Path Code	Transaction Data Exists
<input checked="" type="checkbox"/>	DEMO900	EO900 Local	DEMO	N
<input type="checkbox"/>	DEMO900400	AS/400 : Not Connected	DEMO	N
<input type="checkbox"/>	DEMO900HP	HP9000 : Not Connected	DEMO	N
<input type="checkbox"/>	DEMO900NT	Intel NT : Not Connected	DEMO	N
<input type="checkbox"/>	DEMO900R56	R56000 : Not Connected	DEMO	N
<input type="checkbox"/>	OMW	OMW Checkin/out Environment	OMW	N

Ready

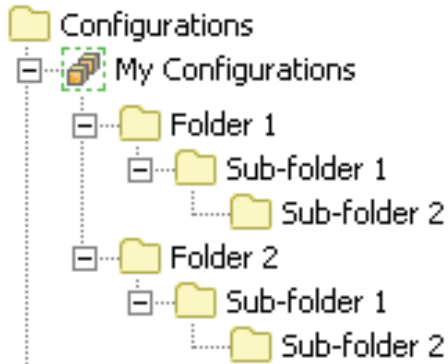
Edit Functions in Specific Nodes

Configuration Assistant logically enables and disables these edit functions within specific nodes:

- Cut
- Paste
- Delete
- Rename

Folder Structure in the Configuration Assistant

In this portion of the tree, configuration definitions are grouped together by using folders and subfolders. You can use folder structures to organize your configurations.



Tip

You can right-click on a folder and choose to create a new subfolder, or delete the selected folder.

See Also

- [My Configurations](#)
- [JD Edwards Configurations](#)

Help Tab



Within Configuration Assistant, Help is mapped according to three specific nodes:

- [Configurations](#)
- [My Configurations](#)
- [JD Edwards Configurations](#)

See Also

The topic [Help](#) in the section: [Menu Options](#).

Configurations

This portion of Help provides overview information and includes a number of Productivity Hints regarding the user interface of the Configuration Assistant.

When initially selected, the Help for this node maps to the file `Welcome.html`. This file name is displayed whenever you click the Back or Next buttons in the Help navigation.



Tip

Clicking the Home button returns you to the beginning of the `Welcome.html` file. To see a complete index of Help topics for Configuration Assistant, use this Home navigation at the bottom of any Help panel:

[Prev](#)

[Up](#)

[Next](#)

[Home](#)

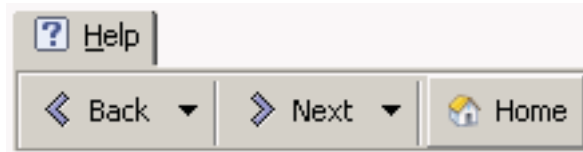
My Configurations

This portion of Help includes a description of My Configurations and includes links to further Help for all sub-nodes:

- Tables
- OMW Projects and OMW Objects (requires JD Edwards Tools Release 8.98 or greater)

- User Defined Codes
- Security
- Task Views
- Versions

When initially selected, the help for this node maps to the file `MyConfigurations.html`. This file name is displayed whenever you click the Back or Next buttons in the Help navigation.



Tip

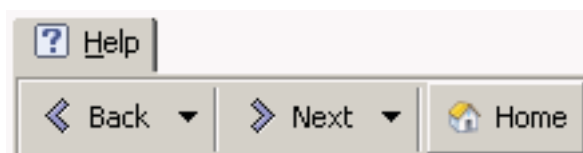
Clicking the Home button returns you to the beginning of the `My_Configurations.html` file. To see a complete index of Help topics for Configuration Assistant, use the Home navigation at the bottom of each help topic as described in the [Tip](#) in the Configuration portion of [Help Tab](#).

JD Edwards Configurations

This portion of Help includes a description of JD Edwards Configurations and includes links to further Help for all subnodes:

- Tables
- OMW Projects and OMW Objects
- User Defined Codes
- Security
- Task Views
- Versions

When initially selected, the help for this node maps to the file `JDE_Configurations.html`. This file name is displayed whenever you click the Back or Next buttons in the Help navigation.



Tip

Clicking the Home button returns you to the beginning of the `JDE_Configurations.html` file. To see a complete index of Help topics for Configuration Assistant, use the Home navigation at the bottom of each help topic as described in the [Tip](#) in the Configuration portion of [Help Tab](#).

Icons Used by Configuration Assistant

This list includes the icons used within the Configuration Assistant:

- **About**



Indicates context sensitive help is available.

- **Add**



Adds a new item from a list of available items that are logically determined according to the location from which the command is invoked.

- **APPL Object**



Identifies an item as an APPL object within OMW.

- **APPL Version Object**



Identifies an item as an APPL version object within OMW.

- **BL Object**



Identifies an item as a BL object within OMW.

- **BSFN Object**



Identifies an item as a BSFN object within OMW.

- **BSFN SBF Object**



Identifies an item as a BSFN SBF object within OMW.

- **BSVW Object**



Identifies an item as a BSVW object within OMW.

- **Configuration**



- **Copy**



Copies the selected item and places the contents in the clipboard.

- **Cut**



Cuts the selected item and places the contents in the clipboard.

- **DD (Data Dictionary) Object**



Identifies an item as a DD (Data Dictionary) object within OMW.

- **Delete**



Deletes the selected item and places the contents in the clipboard.

- **Deselect All**



Deselects all check boxes within an array displayed in the right-hand pane.

- **Document**



Identifies the item as an attached document.

- **DSTR Object**



Identifies an item as a DSTR object within OMW.

- **End User Tasks**



Identifies an item as an end user task.

- **Exit**



Exits the form from which this icon is clicked.

- **Extract**



Extracts the selected package or selected items.

- **Find**



Executes a search for objects based on criteria into the search dialog box, either when entered by a user or selected from a drop-down list.

- **Folder**



Identifies a node as a folder with no specific attributes known to Configuration Assistant.

- **Folder Open**



Indicates the selected node is an opened folder with no specific attributes known to Configuration Assistant.

- **Help**



Displays help for the selected subject.

- **GT Media Object**



Identifies an item as a GT media object within OMW.

- **JD Edwards Configurations**



Identifies the currently selected item as a default read-only configuration located under the JD Edwards Configurations node.

- **My Configurations**



Identifies the currently selected item as a user-defined configuration located under the My Configurations node.

- **None Exist**



Indicates an error condition for a table. For example, it could indicate a table spec mismatch, DD item missing, or that the table does not exist in the datasource to which it is mapped.

- **OK**



Indicates it is OK to accept a selection.

- **OMW Object**



Identifies an item as an OMW object.

- **OMW Project**



Identifies an item as an OMW project.

- **OMW User Defined Code**



Identifies an item as an OMW UDC.

- **OMW User Defined Code Value**



Identifies an item as an OMW UDC value.

- **Paste**



Pastes the current contents of the clipboard at the selected location.

- **Preferences**



Identifies the item selection (from File > Preferences) as preferences for Configuration Assistant.

- **Public**



Indicates an item as containing *PUBLIC records within JD Edwards EnterpriseOne.

- **Public Security Record**



Indicates an item as a *PUBLIC security record within JD Edwards EnterpriseOne.

- **Refresh**



Identifies the Rename function in the file menu Edit > Rename.

- **Rename**



Refreshes and collapses the left-hand pane node display within Configuration Assistant.

- **Role**



Indicates an item as containing roles records within JD Edwards EnterpriseOne.

- **RPDF Object**



Identifies an item as a RPDF object within OMW.

- **Save**



Saves the selected contents from memory to disk.

- **Save All**



Saves all currently unsaved items from memory to disk.

- **Security Data**



Identifies an item as containing security records within JD Edwards EnterpriseOne.

- **Select All**



Selects all check boxes within an array displayed in the right-hand pane.

- **Solution Explorer Relationship**



Identifies an item as a Solution Explorer relationship.

- **Solution Explorer Task**



Identifies an item as a Solution Explorer task.

- **Solution Explorer Variant**



Identifies an item as a Solution Explorer variant.

- **SVCT Object**



Identifies an item as a SVCT object within OMW.

- **Table**



Identifies an item as a JD Edwards EnterpriseOne database table.

- **TBLE Object (existing)**



Identifies an item as an existing TBLE object within OMW.

- **TBLE Object (existing)**



Identifies an item as an existing TBLE object within OMW.

- **Tables**



Identifies items as JD Edwards EnterpriseOne database tables.

- **TBLE Object (existing)**



Identifies an item as an existing TBLE object within OMW.

- **TBLE Object (non-existing)**



Identifies an item as a non-existing TBLE object within OMW.

- **Task Views**



Identifies an item as a task view within JD Edwards EnterpriseOne.

- **UBE Template Object**



Identifies an item as a UBE template object within OMW.

- **UBE Version Object**



Identifies an item as a UBE version object within OMW.

- **User Defined Code (UDC)**



Identifies an item as a User Defined Code (UDC) within JD Edwards EnterpriseOne.

- **User**



Indicates an item as containing user records within JD Edwards EnterpriseOne.

- **Version**



Identifies an item as a JD Edwards EnterpriseOne version.

- **View**



Identifies an item as a view within JD Edwards EnterpriseOne.

- **Welcome**



Identifies the item selection as the welcome for Configuration Assistant.

- **Workflow Object**



Identifies an item as a workflow object within OMW.

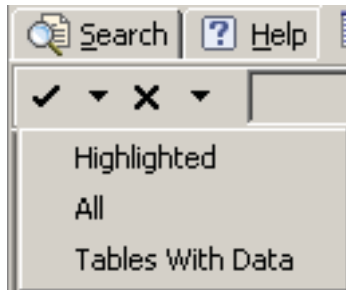
- **XMLP Object**



Identifies an item as an XMLP object within OMW.

Multiple Selects and Deselects

You can select or deselect multiple items using the *check* (checkmark) and *uncheck* (X) icons that are located at the top of the Tables tab.



Each icon has an associated drop-down list that enables you to perform batch selection of:

Selects

- Highlighted
- All
- Tables with Data



Tip

The check pulldown option to select **Tables With Data** instructs the system to calculate the record count on all the tables. Be aware that this process can take considerable time to complete depending on the extent of the database.

Deselects

- Highlighted
- All
- Tables without Data



Tip

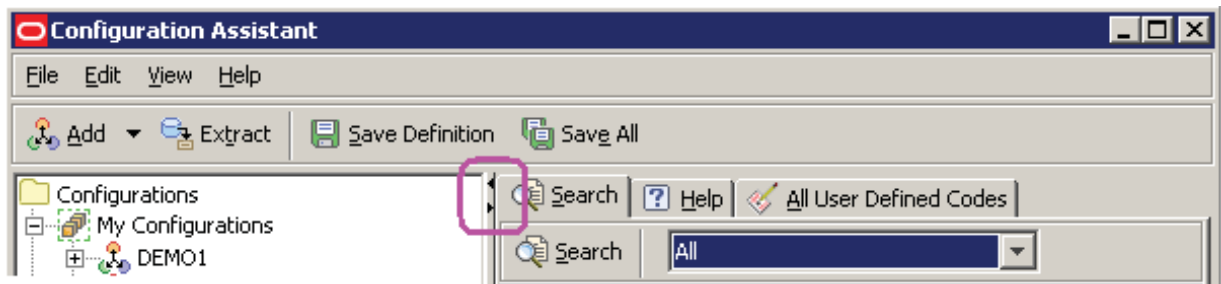
This selection is temporarily disabled (grayed out) until the counts for the All Tables panel or the Search result panel have been completed and populated.

If this functionality is disabled (that is, the icon group is completely grayed out), it is because the configuration is read-only. For example, all JD Edwards Configurations are set to read-only.

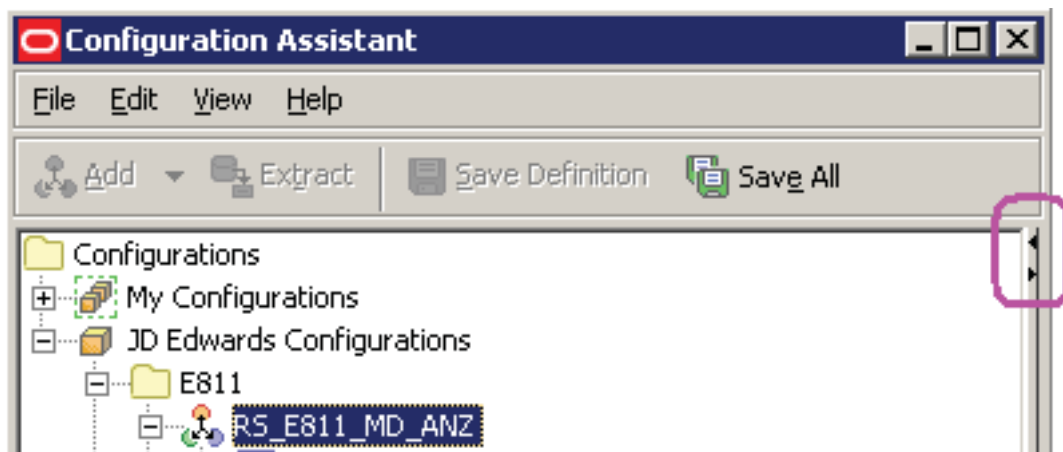
Panes in the Configuration Assistant

The Configuration Assistant allows you to display or hide the right-hand pane of the display.

If the display is showing both panes, to hide the right-hand panel click the lower right-facing arrow on the separator bar between the panes.



If the display is showing a single pane, to show the left-hand panel, click the upper left-facing arrow.



PDF Version of this Document

This document is also available in PDF form on the Update Center.

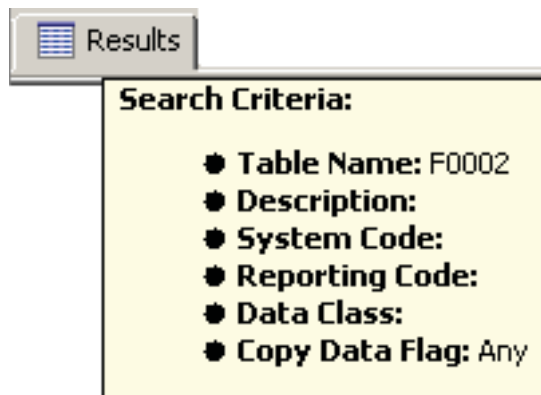
Search Drop-Down List - Selecting All

If you select All from the Search drop-down list, the Configuration Assistant pulls in all items which are defined for the selected node. This does not include transactional data.

Search Results

For each Search that you execute, Configuration Assistant automatically creates and opens a new and separate tab called Results. If you click on a node of a different type, then back to the previous node, Configuration Assistant recalls the results tabs that were open. This is true whether or not the nodes are in the same configuration. If you do not want to save any search results, you should close them as appropriate. To close a results tab, right-click on the tab and select Close Results or Close All Results.

If you hover over a Results tab, the Search criteria of the results are displayed in a flyover panel. For example:



Search Strings - Valid Delimiters

If you manually enter search strings, or if you copy them from any application such as a spreadsheet, valid delimiters for any search field can include these characters, either singly or in any combination:

- space character(s)
- comma character(s)
- semicolon character(s)
- tab character(s)

If there are multiple contiguous valid delimiters, the system parses them to a single occurrence. For example, if you enter the search string `table1,,,,,table2`, the system parses the search string as if a single comma delimiter were entered and, assuming the system located the tables, the returned results are displayed as `table1,table2`.

Search Strings - Wild Cards

You can use an asterisk (*) as a wild card to substitute for any character in any position within a search string. However, you cannot use any other operators or Boolean expressions in the search string.

Sorting Within Columns in a Grid

You can sort (either ascending or descending) the data in the column in a grid by clicking the column heading. You can sort on multiple columns by holding the control (Ctrl) key and clicking the column headings.

<div> Search Help All Tables </div>					
<div> </div>		Tables 3754 of 3754			
	Table	Rows	Load Action	Data Class	Copy Data
<input type="checkbox"/>	F91014	170790		T	N
<input type="checkbox"/>	F00165	120314		B	N
<input type="checkbox"/>	F9203	80253		D	Y
<input type="checkbox"/>	F9200	77908		D	Y

Status Bar

The bottom bar of the Configuration Assistant screen lists helpful status information for the selected node with these segments (from left to right):

- Segment 1: Generally displays the name of the Java-based EnterpriseOne application. In this case, Configuration Assistant.



Note

Exceptions

If you are working on a single new unsaved configuration within My Configurations, when you click Save Definition this element is populated with the phrase **NAME saved**, where *NAME* is the name of your configuration.

If you are working on multiple new unsaved configurations within My Configurations, when you click Save All this element is populated with the phrase **x configurations saved**, where *x* is the number of previously unsaved configurations that were saved.

- Segment 2: Name of the selected configuration.
- Segment 3: Name of EnterpriseOne user who is currently signed on.
- Segment 4: Name of EnterpriseOne environment that is currently signed in to.
- Segment 5: Role of the user who is currently signed on.

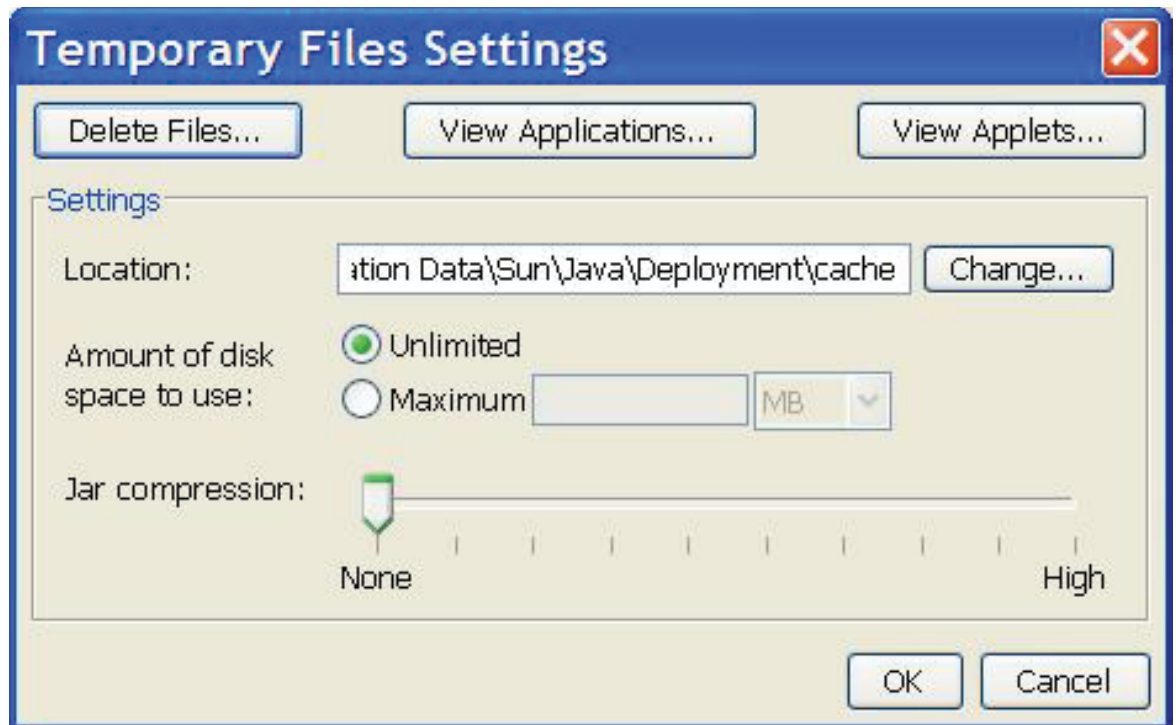
Manually Creating a Shortcut for Configuration Assistant

To manually create a shortcut for Configuration Assistant:

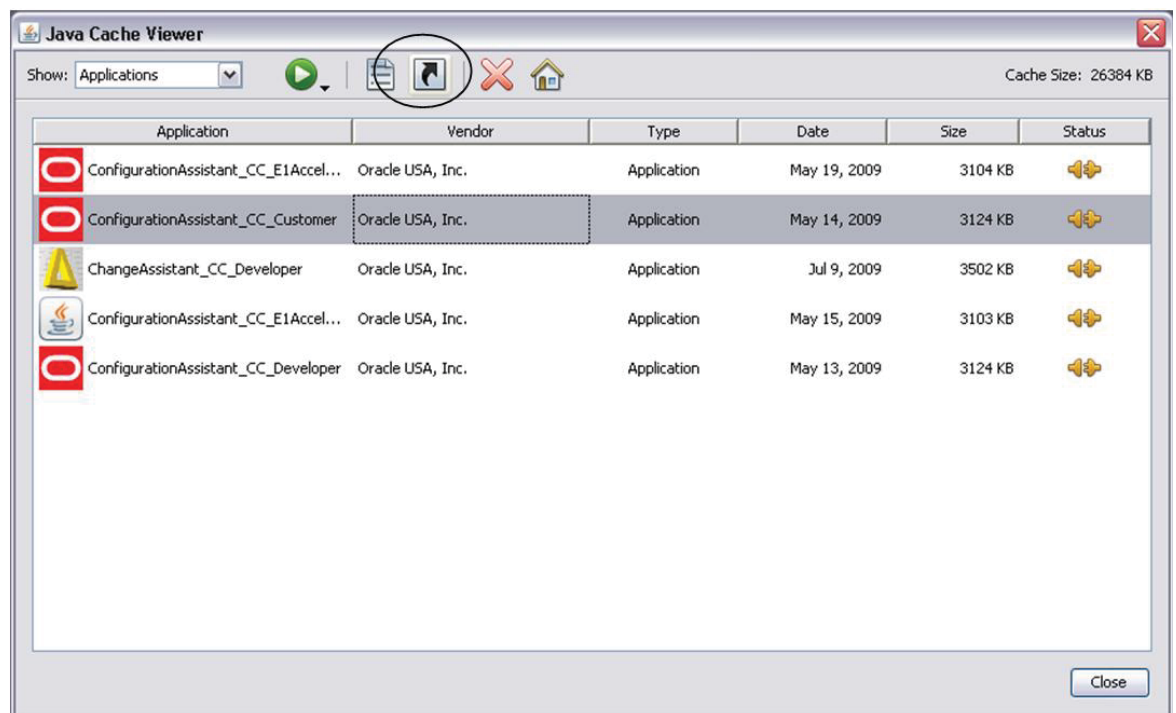
1. In Microsoft Windows, navigate to Start > Settings > Control Panel and double-click on the **Java** icon.



- On Java Control Panel, on the **General** tab, in the **Temporary Internet Files** section, click the **Settings...** button.



- On Temporary Files Settings, click the **View Applications...** button.



- On Java Cache Viewer, with Configuration Assistant highlighted, click the icon to create a shortcut or from the File Manual select Applications > Install Shortcuts.

Menu Options

Configuration Assistant provides these menu options:

- [File](#)
- [Edit](#)
- [View](#)
- [Help](#)

File

From the File menu, you have the following selections:

- [Add a New Configuration](#)
- [Extract a Configuration](#)
- [Save Definition](#)
- [Save All](#)

Add a New Configuration



Caution

You must be within the My Configurations folder in order to add a new configuration.

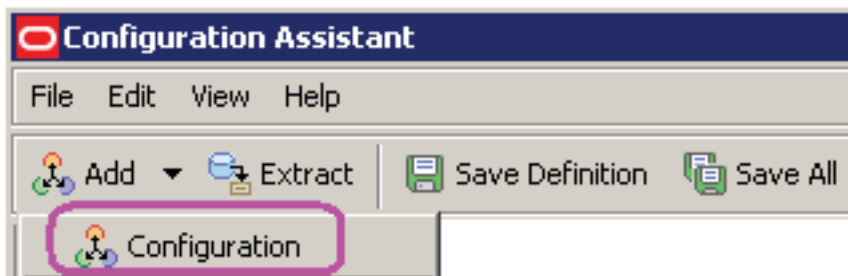
This section discusses:

- [Accessing the Configuration Properties](#)
- [Configuration Properties - General Tab](#)
- [Configuration Properties - Advanced Tab](#)

Accessing the Configuration Properties

To add (create) a new configuration, you must access the Configuration Properties using one of these three (3) methods, which are functionally equivalent:

1. From the Configuration Assistant toolbar, select File > Add > Configuration.
2. Click the Add button and select Configuration from the pulldown list.



3. In the tree node view in the left pane, highlight and right-click on the My Configurations node, and select Add Configuration.



Using any of the preceding three methods, Configuration Assistant displays the Configuration Properties dialog box, which enables you to specify the properties for the configuration you are adding.

See Also

- [Configuration Properties - General Tab](#)
- [Configuration Properties - Advanced Tab](#)

Configuration Properties - General Tab



The screenshot shows a Windows-style dialog box titled "Add Configuration". It has three tabs: "General", "Advanced", and "Help". The "General" tab is selected. Inside the dialog, there is a section labeled "Configuration" containing four fields: "Name:" (a text box), "Description:" (a text box), "Documentation:" (a text box with a magnifying glass icon to its right), and "Deploy To:" (a dropdown menu currently showing "Selected Environment(s)"). At the bottom of the dialog are "OK" and "Cancel" buttons, each with a checkmark or X icon respectively. A small empty text box is located at the bottom right of the dialog.

On Configuration Properties, with the General tab selected, complete these fields

- **Name**

Enter a name for your configuration.



Warning

This field is restricted to 10 characters maximum, and all characters must be in upper case. You *cannot* use any of these special characters in this field:

```
/~`!@#$$%^&()+=[]{ }|\"':;,?\|><*.\";
```

Additionally, if you plan on extracting a configuration to a RDB, the name cannot start with a number due to RDB restrictions.

- **Description**

Enter a description for your configuration.



Warning

This field can contain a maximum of 30 characters.

- **Documentation**

Optionally, you can attach documentation to be delivered with your configuration. For example, you may want to include some special installation instructions for your configuration in the form of an HTML file. Attached documentation that is attached using this field will appear in the Task Assistant, which should be associated with each task in the load schedule.

There is no restriction on the file types that you can attach as documentation.

You can only attach a single physical file from this field.



Tip

If you want to include multiple files as documentation, you can zip them into a single file and attach that. Alternately, you can include the documentation (or any other files) that you want to include in an extracted configuration by placing them in this directory:

```
<Solution Directory>/<solution name>/
```

That is, all contents of the <solution name> directory are automatically included in the .par file created by Configuration Assistant when it performs an Extract. However, even though the files are delivered to a source location using this method, they are not associated with a task as they would be if you used the Documentation field.

This directory is defined in [Using Preferences](#).

- **Deploy To:**



Note

Use this option to limit the configuration "consumer's" deployment options when the extracted configuration is deploying using Change Assistant. Use of this option does not limit the user of Configuration Assistant.

Use the pulldown to select the environments to which to deploy:

- Selected Environment(s)

Using this selection you can deploy to any selected environment, which can include local.

- Local Environment Only

Using this section you can only deploy to local, regardless of whether local is explicitly selected or not. When you choose this selection, any other selected environments are ignored.

- Local and Selected Environment

Using this selection you can deploy to all selected environments including local regardless of whether local is explicitly selected or not.

Configuration Properties - Advanced Tab

You should use the Advanced tab to make selections from preconfigured solutions, if you already have pre-defined OMW Projects or Tasks Views, or if you are using languages.

JD Edwards Tools Release 8.97.

Configuration Properties

General

Advanced

Help

Industry/Region

Region:

- No Region Selected

Industry:

- No Industry Selected

Default Task View:

Additional Configuration

OMW Projects:

Task Views:

Language:

- Domestic Language

Ok

Cancel

JD Edwards Tools Release 8.98 or greater.

The screenshot shows a Windows-style dialog box titled "Add Configuration" with a blue header bar containing a red "X" button. Below the header are three tabs: "General", "Advanced" (which is selected and highlighted with an orange border), and "Help". The "Advanced" tab contains two main sections. The first section, titled "Industry/Region", includes three fields: "Region:" with a dropdown menu showing "- No Region Selected", "Industry:" with a dropdown menu showing "- No Industry Selected", and "Default Task View:" with an empty text box. The second section, titled "Additional Configuration", includes two fields: "Task Views:" with an empty text box and a magnifying glass icon to its right, and "Language:" with a dropdown menu showing "- Domestic Language". At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red "X" icon. A status bar at the very bottom contains two empty text boxes.

On Configuration Properties, with the Advanced tab selected, complete the fields in these two regions:

- [Industry/Region](#)
- [Additional Configuration](#)

Industry/Region

In the Industry/Region section of the Advanced tab, complete these fields:

- **Region**

The pulldown list is populated based on the UDC Description01 field for the region (01RS/RC).

For example:

- ANZ - Australia/New Zealand

- **Industry**

The pulldown list is populated based on the UDC Description01 field for the industry (01RS/RI).

For example:

- MD - Manufacturing and Distributing



Caution

The first time you define an industry or region in a configuration the data is retrieved based on the combination of the region and industry UDC values specified. If you subsequently change the industry or region UDC, by design your changed configuration will still contain the original data because the Configuration Assistant only changes the definition of the data within the configuration, not the data itself. When you extract the configuration, the Configuration Assistant assigns any Versions with the changed value.

As an example use case, if you first design a configuration based on the ANZ region, the Configuration Assistant pulls in all record types associated with that UDC. If you subsequently change the region to Singapore, then the previously retrieved data remains the same, while in the configuration the identifier for the records is changed from ANZ to SIN. When you extract the configuration, the Configuration Assistant changes the identifier for Versions from ANZ to SIN. As a result, when the configuration is loaded into a target environment, there are no artifacts from the ANZ region.



Warning

For UDC values for the 01RS/RC and 01RS/RI tables other than the defaults provided by JD Edwards EnterpriseOne:

- Customers should use values in the range from 900 to 999 for your configuration.
- Business partners should contact Oracle to obtain a unique code.

- **Default Task View**

The Default Task View is based on the values you select for region and industry. The field is populated automatically after an industry and region are selected.

Additional Configuration

In the Additional Configuration region of the Advanced tab, complete these fields:

- **OMW Projects** (not displayed with JD Edwards Tools Release 8.98 or greater)

Click the browse button to select from existing OMW Project Names. This enables you to bring all configuration information such as UDCs and Versions into your definition.



Note

Configuration information does not include code or objects. For more information on product packaging, refer to the *JD Edwards EnterpriseOne Tools Package Management Guide*.

- **Task Views**

Click the browse button to select from an existing Task Master for tasks of type 00 (Task Views).

- **Language**

Configuration Assistant populates a pulldown list of languages based on the values of UDC 01/LP. When you select a language from this pulldown, the translation table (that is, “D” tables) records for UDCs and Task Views are included in your configuration.

For example, a language selection on the pulldown might be:

- P – Portuguese



Note

Specifying a language pulls language records into your configuration for UDCs and Task Views only. If you want to include the entire translation table for these, or any other data, you must specifically include translation tables in the [Tables](#) section of your configuration definition.

See Also

[Configuration Properties - General Tab](#)

Extract a Configuration



Tip

On Web Development Clients (fat clients), the Extract function allows you to extract local specs and Central Objects.

On Standalone Clients and the Deployment Server, the Extract function only allows you to extract local specs.

After you create a configuration, you can extract it to a portable database. The output of the extraction depends on the JD Edwards EnterpriseOne Tools release, JD Edwards EnterpriseOne Applications Release, and the machine on which the extraction is performed.

Extraction Output Matrix			
Tools Release	Output		
	Applications Release 8.12 or prior	Application Release 9.00	
8.98	XML	XML -- with these extraction machine variables:	
	MSDE	Standalone:	Extract Local > XML
	SSE	Deployment Server:	Extract Local > XML
		Web Development Client:	Extract Central > XML
			Extract Local > XML
8.97 8.96	Depends on installed database on extraction machine which can be either: • MSDE • SSE	MSDE	

See Also

- [Troubleshooting Extract](#)
- [Packaging and Loading an Extracted File onto a Target Machine](#)
- [Tables Involved when Extracting a Configuration Definition with Configuration Assistant](#)

To extract a configuration, highlight the configuration to be extracted in the tree node display in the left pane:

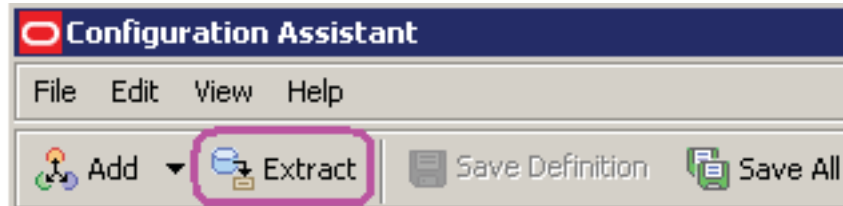
1. From the Configuration Assistant toolbar, select File > Extract.

**Note**

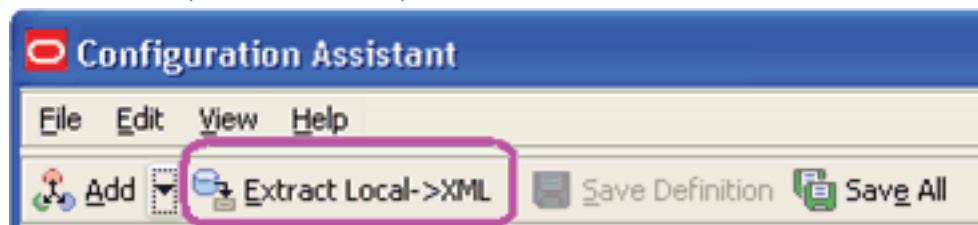
As an alternate method, you can either:

- Click the Extract button.

Extract button (Tools Release 8.97).



Extract button (Tools Release 8.98).

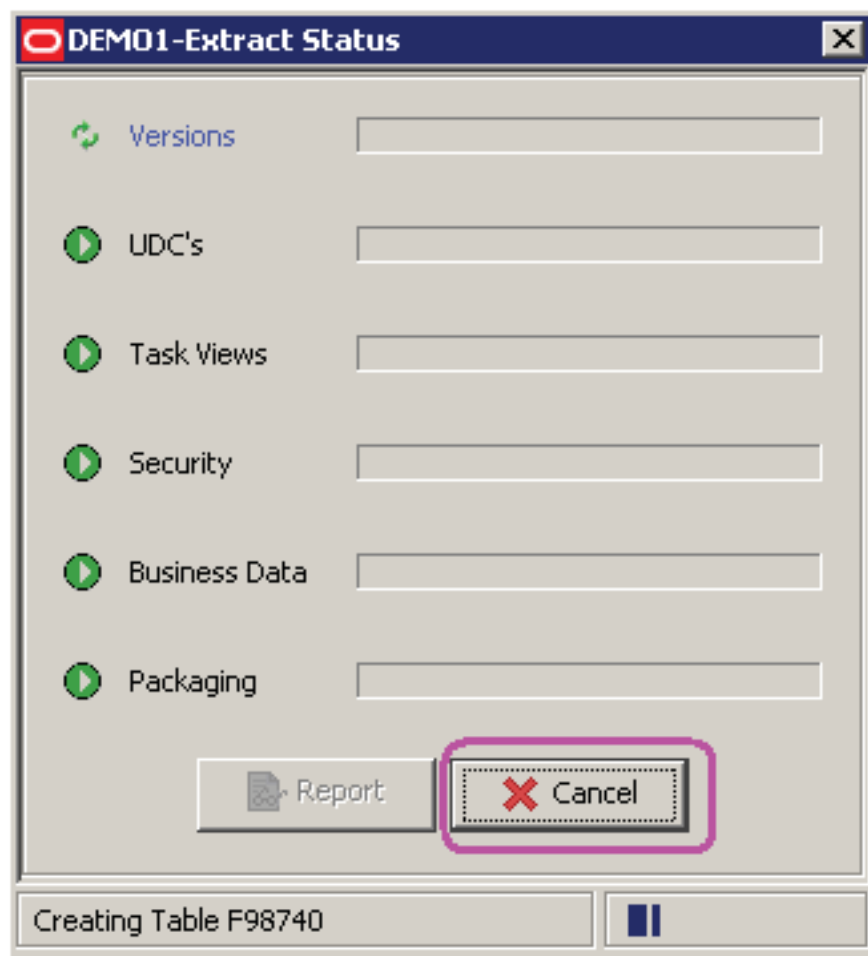


- Use the keyboard shortcut: Ctrl+T



Caution

If you accidentally click Extract, or if you want to stop the Extract process once it has begun, click the Cancel button in the Extract Status dialog box.



The status of the extraction process is displayed in the *node_name-Extract Status* panel.

If the Extract completes successfully, each extracted category will be flagged with a green check mark and the bottom of the Extract Status panel will indicate **Completed Successfully** in the bottom left hand portion of the dialog box.

2. When the extraction is complete, select either Report to view the Extract Report or Close to close the Extract Status window.

For details on the Extract Report, refer to [Extract Report](#).

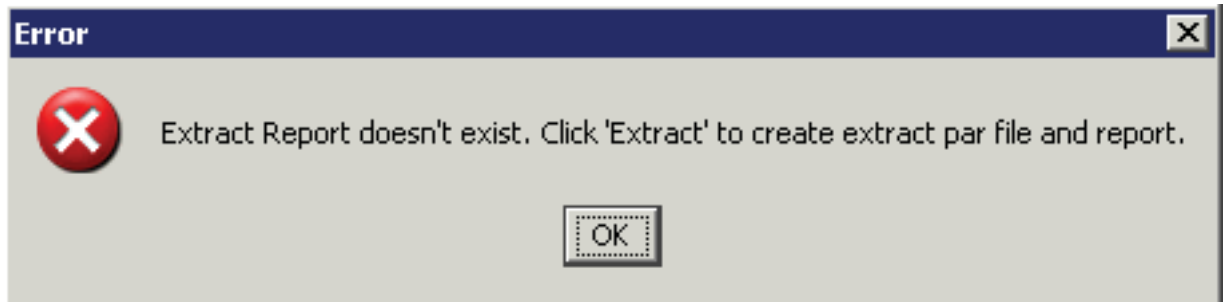


Tip

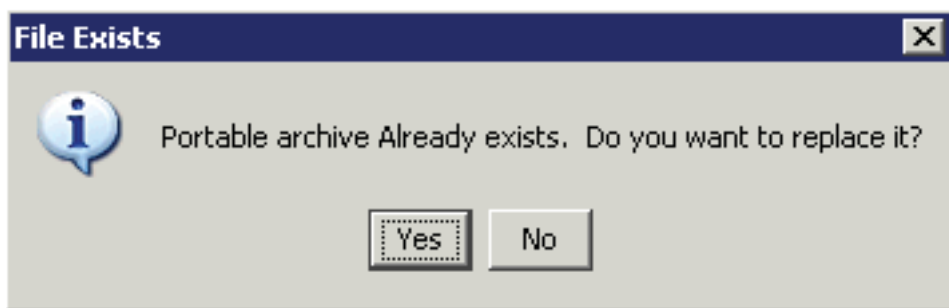
The portable archive (.par file) of the configuration that you extract is placed into the directory you have specified in [Using Preferences](#). The prefix of the .par file (that you specified in Name field during the task [Add a New Configuration](#)) identifies each custom configuration you create in My Configurations.

Troubleshooting Extract

If you have not previously extracted a report for the selected configuration, and you attempt to view the Extract Report, this error is displayed:



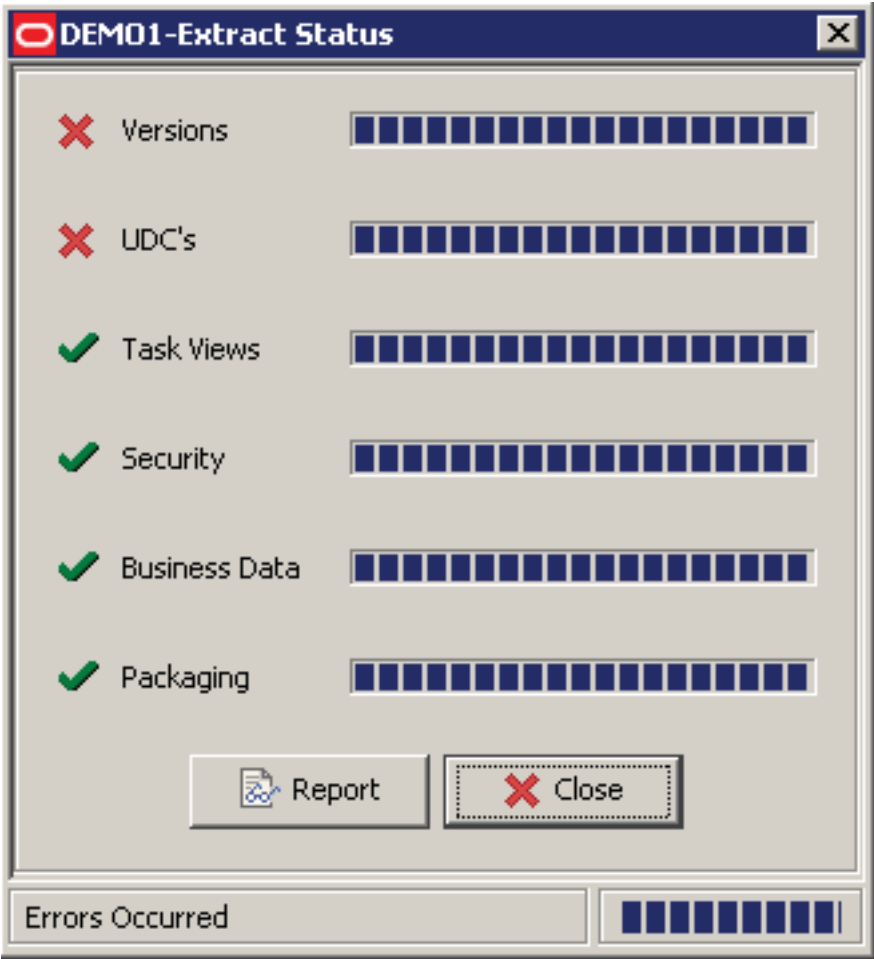
If you have previous extracted a configuration, this error is displayed:





Warning

If the Extract does not completed normally, each unsuccessful category will be flagged with a red X and the bottom of the of the Extract Status panel will indicate **Errors Occurred**. Click the Report button to view the exception report, which contains information useful in troubleshooting the error conditions.



Click Yes to view the Exception Report. For details on the Extract Report, refer to [Extract Report](#).



Tip

You can also use OMW logs to help in troubleshooting. In OMW, find project named **CFG_your_configuration_name**, click the project, and use the form exit to view the logs.

Packaging and Loading an Extracted File onto a Target Machine

Configuration Assistant. This tool is used to create configurations and to extract them into a portable archive. Typically the machine on which the tool is running must use a Microsoft Windows operating system. Typically such a machine would be either a JD Edwards EnterpriseOne Standalone Client or a JD Edwards EnterpriseOne Web Development Client (also known as a Fat Client).

The output of the extraction depends on the JD Edwards EnterpriseOne Tools release, JD Edwards EnterpriseOne Applications Release, and the machine on which the extraction is performed. For details, refer to the Extraction Output table in the section entitled: [Extract a Configuration](#).

Change Assistant. This tool is used to load an extraction onto a target machine, which must be a JD Edwards EnterpriseOne Deployment Server or Standalone Client. By definition, the Deployment Server must also be running a Microsoft Windows operating system. By default, the Configuration Assistant creates the .par file in the directory you specified in [Using Preferences](#).

To summarize the Change Assistant steps:

1. In order to avoid having the Change Assistant inadvertently locate test extractions or perhaps other extractions that you may not be ready to share, you should copy the .par file to an appropriate folder under the Change Assistant downloads directory on the Deployment Server or Standalone Client.
2. Navigate to the specified source directory containing the .par file and select the .par file from the Change Assistant display.
3. Click the Deploy button.

Change Assistant displays a list of available JD Edwards EnterpriseOne installed environments on this machine (which is either a Deployment Server or Standalone Client).

4. Select the target JD Edwards EnterpriseOne environment into which you want to load the contents of the configuration.



Warning

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

Tables Involved when Extracting a Configuration Definition with Configuration Assistant

This section lists the tables involved when extracting a configuration definition with Configuration Assistant.

1. OMW Projects and OMW Objects

These tables and objects will have records extracted corresponding to the OMW projects and OMW Objects specified in the advanced options:

Table	Description or Object Type
F98220	OMW Project Header
F98222	OMW Project Objects
F9860	TBLE -- Object Librarian Master Table
F9861	TBLE -- Object Librarian Status Detail
F98710, F98711, F98712, F98713	TBLE
F98720	BSFN
F98740, F98741	ER
F98743	DSTR
F98750, F98751	APPL
F98760, F98761	UBE

2. Versions

These tables will have records extracted corresponding to the Versions specified in the configuration definition:

- F983051 - Versions List
- F983052 - Versions List Tag Table
- F98740 - Event Rules - Link Table
- F98741 - Event Rules - Spec Table
- F98760 - Report Design Aid Text Information
- F98761 - Report Design Aid Specification Information

3. User Defined Codes

These tables will have records extracted corresponding to the UDC codes and values specified in the configuration definition:

- F0004 - User Defined Code Types
- F0005 - User Defined Code Values

**Note**

If language is specified, these tables will also be extracted.

- F0004D - User Defined Code - Alternate Language
- F0005D - User Defined Code - Alternate Language Description

4. Task Views

These tables will have records extracted corresponding to the Task Views specified in the configuration definition:

- F9000 - Task Master
- F9001 - Task Relationships
- F9005 - Variant Description
- F9006 - Variant Detail

**Note**

If language is specified, these tables will also be extracted.

- F9002 - Task Alternate Description
- F9005D - Variant Description Alternate Description
- F9006D - Variant Detail Alternate Description

5. Security

These tables will have records extracted corresponding to the users and roles specified in the configuration definition, and the address book information associated with these users will also be extracted:

- F0092 - Library List - Users
- F00921 - User Display Preferences
- F00922 - User Display Preferences Tag File
- F00924 - User Install Packages
- F00925 - User Access Definition
- F00926 - Anonymous User Access Table
- F00927 - E1 Users PIM Information
- F0093 - Library List Control
- F00950 - Security Workbench Table
- F95921 - Role Relationships Table
- F95922 - Permissions List Relationship Table
- F98OWSEC - One World Security

- F0101 - Address Book Master
- F0111 - Address Book - Who's Who

Save Definition



Caution

You must be within the My Configurations folder in order to Save Definition.

To save a configuration that you have created (or modified), select Save Definition:

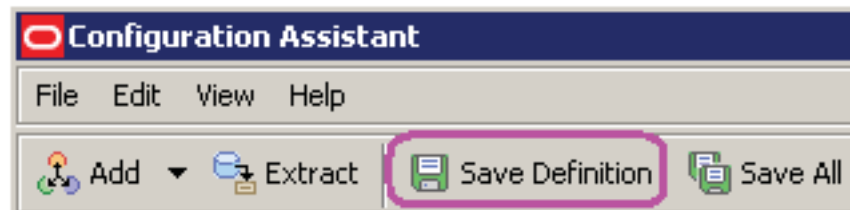
1. Highlight the node for the definition you want to save.
2. From the Configuration Assistant toolbar, select File > Save Definition.



Note

As an alternate method, you can either:

- Click the Save Definition button.



- Use the keyboard shortcut: Ctrl+S

Save All



Caution

You must be within the My Configurations folder in order to Save All definitions.

To save all configurations that you have created (or modified), select Save All:

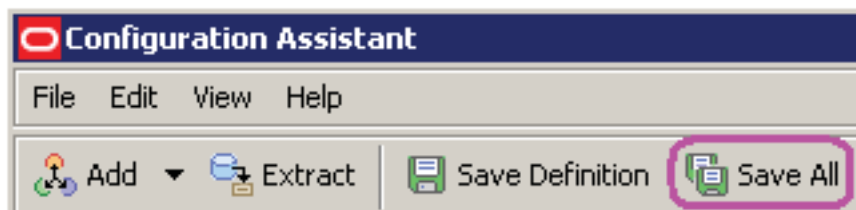
1. Highlight the node for the definition you want to save.
2. From the Configuration Assistant toolbar, select File > Save All.



Note

As an alternate method, you can either:

- Click the Save All button.



- Use the keyboard shortcut: Ctrl+Shift+S

Edit

From the Edit menu, you can perform functions as described in these sections:

- [Using Standard Editing Functions \(Cut, Copy, Paste, Delete, Rename\)](#)
- [Using Preferences](#)

Using Standard Editing Functions (Cut, Copy, Paste, Delete, Rename)



Warning

All configurations within the JD Edwards Configurations node are read-only. Configuration Assistant logically enables and disables certain standard editing functions as applicable, depending on which tree node you select and the context of the configuration.

If you select Delete, there is no direct recovery (or "undo") from within the Configuration Assistant program. However, if you do not Save or Save All subsequent to an inadvertent Delete action, you can effectively recover by not saving and then exiting from Configuration Assistant and re-entering with the previously saved state.

This section describes these standard editing functions:

- [Cut](#)
- [Copy](#)
- [Paste](#)
- [Delete](#)
- [Rename](#)



Tip

The functionality of the standard editing functions is also duplicated with Drag and Drop.

For example, if you want to copy the security roles from a JD Edwards Configuration to a My Configurations, you can either:

- In the source JD Edwards Configuration, highlight the Roles node and choose the standard editing function Copy (either from the Edit menu or by right-clicking).

In the target My Configuration, highlight either the Roles node (if it exists), or the Security node (if the Roles node does not exist) and choose the standard editing function Paste.

- In the source JD Edwards Configuration, highlight the Roles node and drag it.

In the target My Configuration, drop the Roles node that you are dragging either to the Roles node (if it exists) or the Security node (if the Roles node does not exist).

See Also

The topic [Edit Functions in Specific Nodes](#) in the section [Productivity Hints](#).

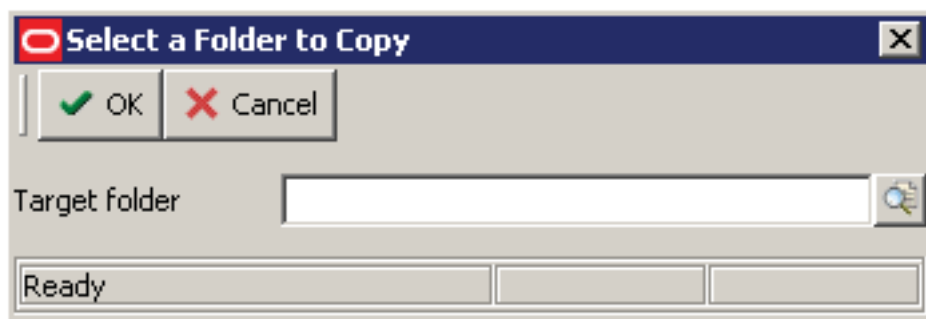
Cut

If you use the standard editing function Cut from either the Edit menu or with the keyboard shortcut Ctrl+C key, the currently selected node is deleted and its contents are copied to the clipboard.

Copy

If you use the standard editing function Copy from either the Edit menu or with the keyboard shortcut Ctrl+C, the contents of the selected node are copied to the clipboard and can be pasted into a new location by using the Paste command.

If you choose Copy by right-clicking, this dialog box prompts you to enter the new name of the selected node:



Tip

Use the browse button or enter a fully qualified path to the target directory to which you want to Copy the selected node. For example:

```
c:\Change Assistant\Packages\Configurator\My  
Configurations\copied_configuration_name
```

Paste

If you use the standard editing function Paste from either the Edit menu or with the keyboard shortcut Ctrl+V key, the current contents of the clipboard are pasted into the currently selected node.

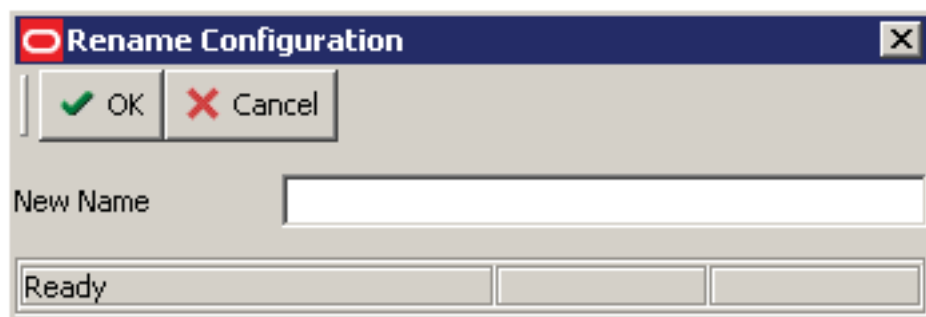
Delete

If you use the standard editing function Delete from either the Edit menu or with the keyboard shortcut Delete key, you are prompted to confirm the deletion:



Rename

If you use the standard editing function Rename from either the Edit menu or with the keyboard shortcut F2, you are prompted to enter the new name for the selected node:

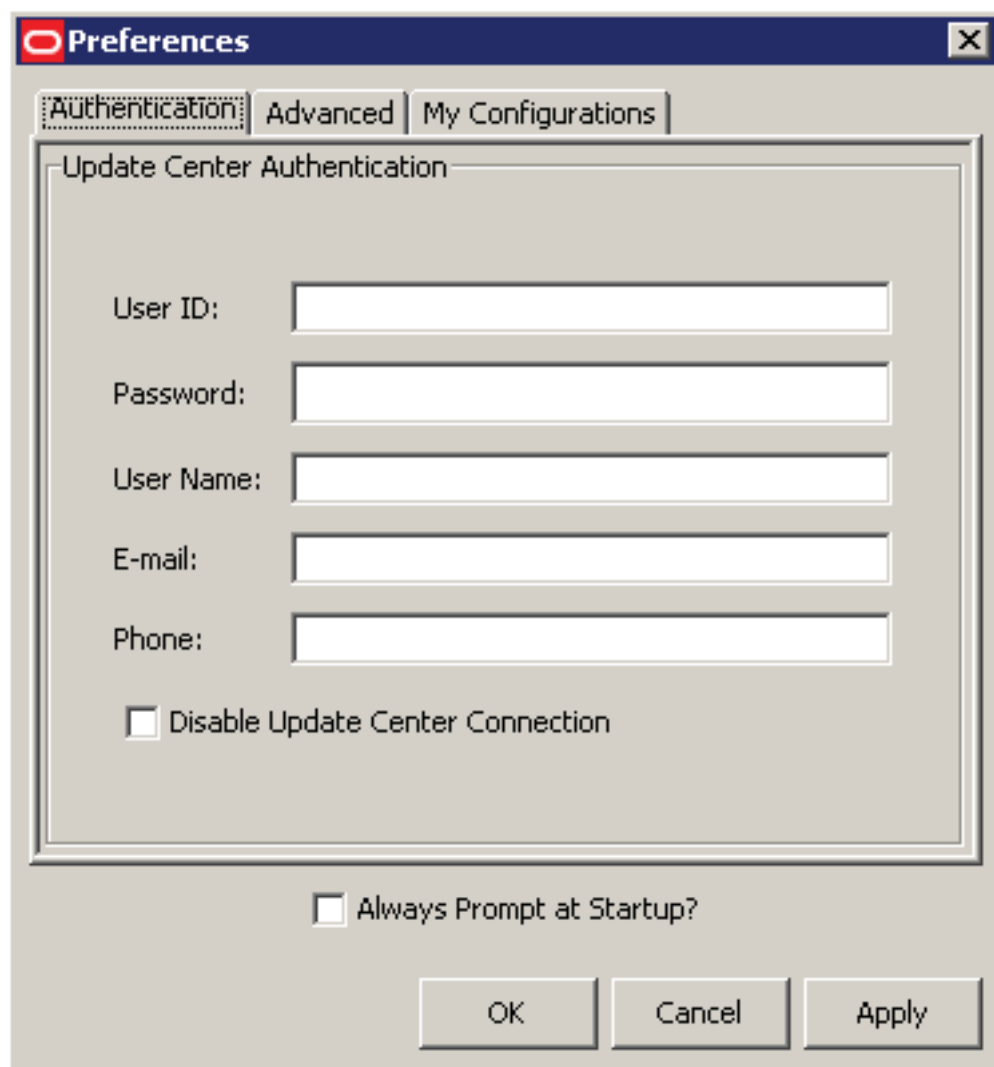


Using Preferences

From Edit > Preferences you can choose from tabs described in these sections:

- [Using the Authentication Tab](#)
- [Using the Advanced Tab](#)
- [Using the My Configurations Tab](#)

Using the Authentication Tab



The screenshot shows a 'Preferences' dialog box with three tabs: 'Authentication', 'Advanced', and 'My Configurations'. The 'Authentication' tab is selected. Inside the dialog, there is a section titled 'Update Center Authentication' which contains five text input fields: 'User ID:', 'Password:', 'User Name:', 'E-mail:', and 'Phone:'. Below these fields is a checkbox labeled 'Disable Update Center Connection'. At the bottom of the dialog, there is another checkbox labeled 'Always Prompt at Startup?'. At the very bottom, there are three buttons: 'OK', 'Cancel', and 'Apply'.

If you choose to use the optional Configuration Assistant Update Center Authentication functionality, complete these fields:

- User ID

- Password
- User Name
- E-mail
- Phone

If you want to disable the automatic connection to the Update Center, you can select this check box:

Disable Update Center Connection

If you want Configuration Assistant to always prompt for authentication credentials on startup, you can select this check box:

Always Prompt at Startup?

Using the Advanced Tab

The screenshot shows a 'Preferences' dialog box with three tabs: 'Authentication', 'Advanced' (selected), and 'My Configurations'. The 'Advanced' tab contains two sections: 'Update Center Connection' and 'Proxy Server Authentication'. The 'Update Center Connection' section has two text input fields: 'Timeout (millis):' with the value '300000' and 'Number of Retries:' with the value '5'. The 'Proxy Server Authentication' section has three text input fields: 'User ID:', 'Password:', and 'Domain:'. At the bottom of the dialog, there is a checkbox labeled 'Always Prompt at Startup?' which is currently unchecked. Below the checkbox are three buttons: 'OK', 'Cancel', and 'Apply'.

If you choose to use the optional Configuration Assistant advanced functionality for connections to the Update Center and for proxy server authentication, complete these fields:

Update Center Connection

- Timeout (milliseconds)

The default value is 300,000 milliseconds.

- Number of Retries

The default value is 5 retries.

Proxy Server Authentication

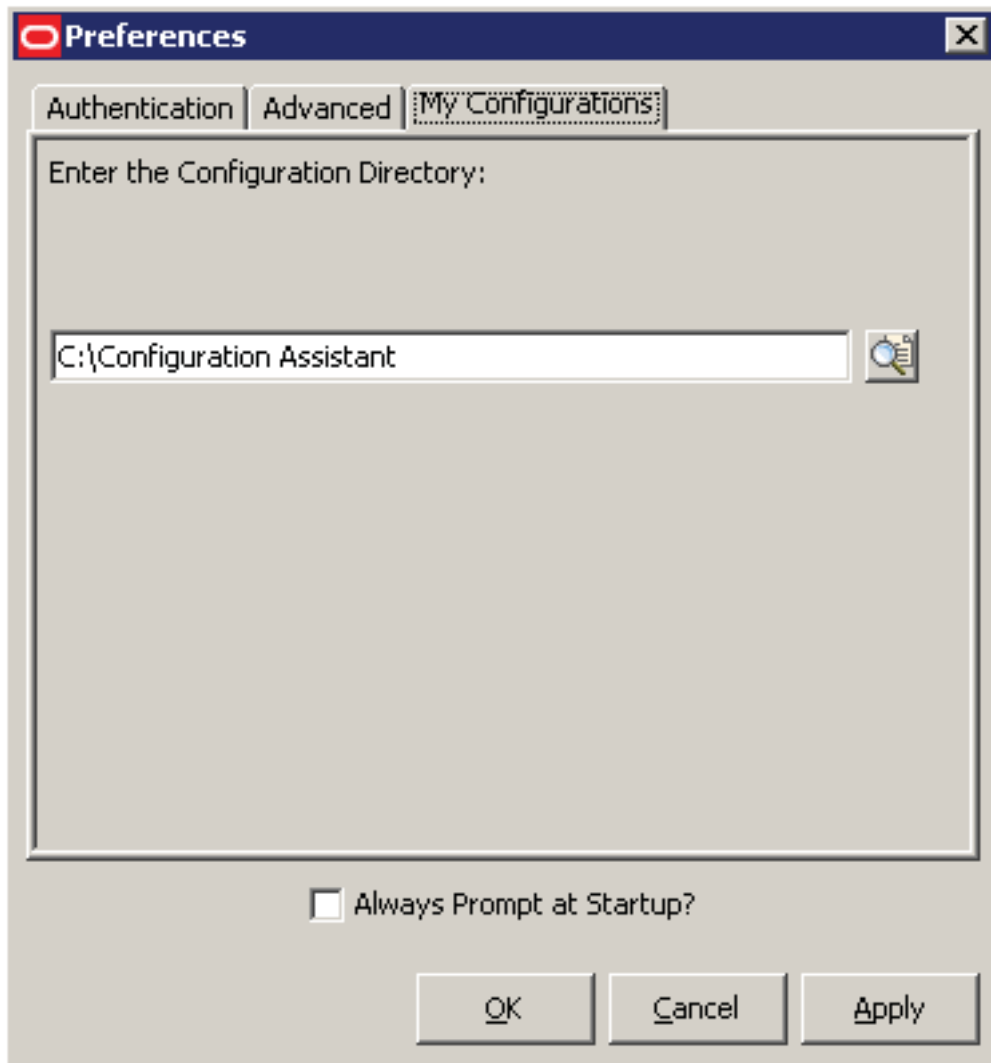
- User ID
- Password
- Domain

If you want to be prompted for any advanced functionality on this tab during the startup of Configuration Assistant, you can select this check box:

Always Prompt at Startup?

Using the My Configurations Tab

You use the My Configurations tab to define the default working directory for your Configuration Assistant. This is the working folder for all configurations that you create.



On Preferences, with the My Configurations tab selected, complete this field:

- **Enter the Configuration Directory**

Enter the directory path or use the browse button to enter the directory for your configurations, which the Configuration Assistant displays under the My Configurations node.



Warning

If you plan to extract RDB configurations this path cannot be to a mapped drive

View

The View menu enables you to generate HTML versions of these reports:

- [Summary Report](#)
- [Extract Report](#)
- [Compare Report](#)
- [Refresh](#)

Summary Report



Note

As a design aid, you can view a Summary Report for any new or existing configuration regardless of whether it has been extracted using the Extract function of Configuration Assistant.

The Summary Report provides a listing of all the information contained in the configuration. The report provides links so that you can easily navigate to each section, including:

- Definition
- OMW Projects and OMW Objects
- Tables
- UDCs



Note

The system generates UDCs in this report if you specify one UDC value at a time. If you specify an entire table, the system generates UDCs in the Tables section of this report.

- Versions
- Security
- Task View

The report only displays a link if information exists for the section. That is, if you do not include a Task View in the configuration, the Summary Report does not create a link to Task View.

In addition, if any documentation is attached to the report, the system provide an active link to it. The generated source HTML file for the Summary Report is located in the directory of the node name. For example, if you generated a Summary Report for RSMDGR, then the file is located here:

`x:\Change Assistant\Packages\your_configuration_name`

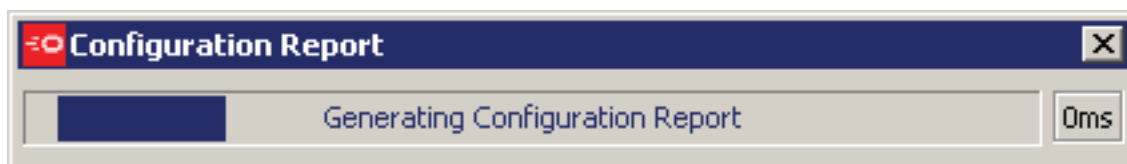
where *x*: is the drive on which your configurations reside, and

where *your_configuration_name* is the name of the node that defines your configuration.

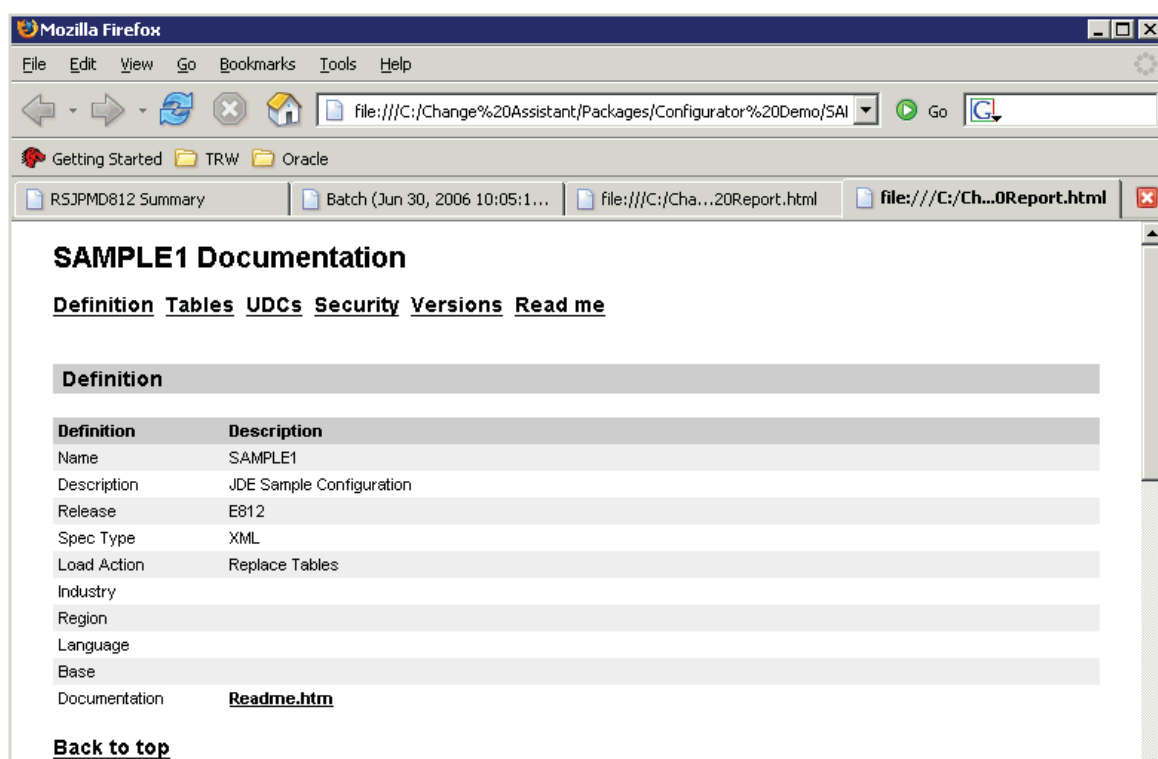
To generate a Summary Report:

1. Highlight any node in an existing configuration.
2. From the View menu, select Summary Report.

The following status panel displays to indicate the report is generating as requested:



After the report is generated, the HTML output is displayed by your default browser as shown in this example:



Extract Report

The Extract Report provides a listing of all the information about the extraction process and the resulting .par file. The report provides links so that you can easily navigate to each section, including:

- Definition
- Action
- Activity

You can only view an Extract Report for configurations that you have previously extracted. To verify if a configuration has already been extracted, check the directory of the node to verify if a `<node_name>_EXTRACT.html` file exists. If this file exists, an Extraction has previously been attempted for the selected configuration. To verify that the Extract is valid, open the Extract Report file and verify that the Extraction completed with no errors.

To view an Extract Report:

1. Highlight a configuration for which you have previously performed an Extract.
2. From View, select Extract Report.

SAMPLE1 Extract Status

[Definition](#) [Action](#) [Activity](#)

Definition	Description
Name	SAMPLE1
Description	JDE Sample Configuration
Type	60 , Configuration Data
Platform	99 , CLIENT
Release	E812 , E812
Date	Jun 26, 2006 5:50:45 PM

[Back to top](#)

Action - Action1151365846807

Action	Type	Status	Action ID	Date/Time
Create Package - Extract to portable form	CREATE_PAR	Success	Action1151365846807	Jun 26, 2006 5:50:46 PM

Compare Report

If you want to compare the contents of one configuration against another, you can view the Compare Report, which presents a side-by-side comparison of the components for the two configurations that you choose. The Compare Report provides two groups of links, which you can use to review the configurations differently:

- **All**

The links in this grouping provide a listing of the components for the first configuration and a second column that describes whether the component exists in the second configuration. For example, **All Tables** provides a listing of all the tables in the first configuration and a Yes/No value in the column for the second configuration to indicate whether that same table is included there.

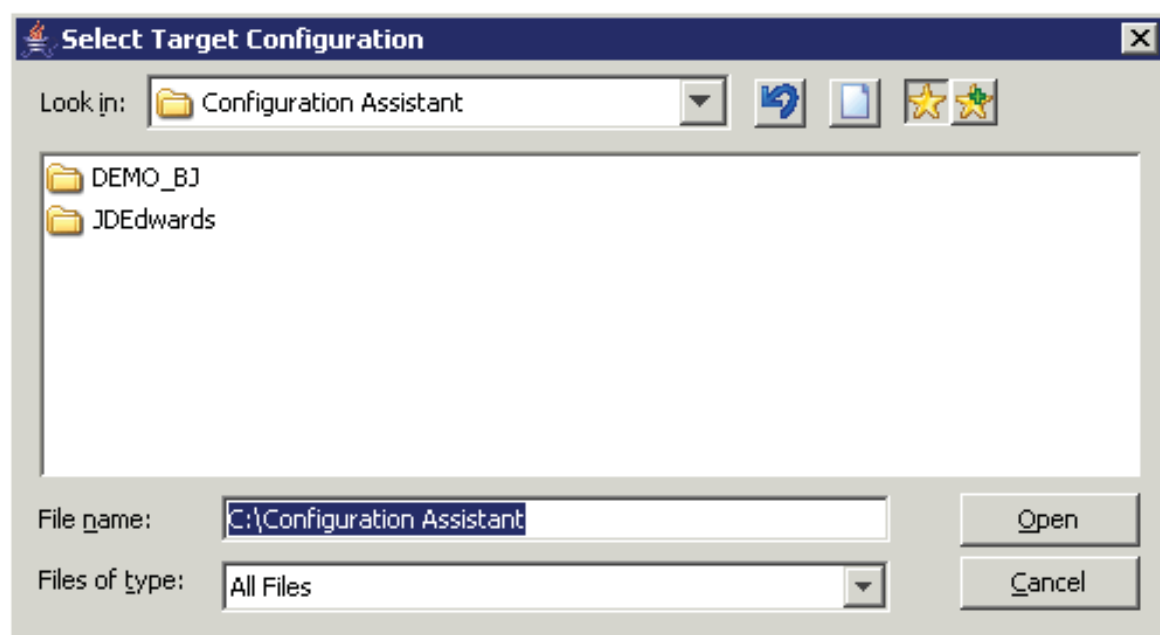
- **Added and Removed**

The links in this grouping provide the differences noted in the All comparisons categories. For example, if you clicked the Added Tables link, the system displays the additional business units in the first configuration that are not in the second. If there are more tables in the second configuration than the first, a link for Removed Tables lists those tables.

To compare configurations:

1. Highlight an existing configuration and from the View menu select Compare Report.

The system displays this dialog box window:



2. Use the browse button or enter the path to locate the configuration that you want to use for the comparison.
3. Click Open.

Configuration Assistant generates the Compare report and opens it in your default browser. For example:

Compare MD_NA and DEMO_BJ

[All OMW Projects](#) | [All Tables](#) | [All Versions](#) | [All UDCs](#) | [All Task Views](#) | [All Public Security](#) | [All Roles](#) | [All Users](#)

| [Added Tables](#) | [Removed Tables](#) | [Removed Versions](#) | [Added UDCs](#) | [Removed UDCs](#) | [Added Task Views](#) | [Removed Roles](#) | [Removed Users](#) |

All OMW Projects

Project ID	Description	MD_NA	DEMO_BJ
Back to top			
All Tables			
Table Name	Description	MD_NA	DEMO_BJ
F0002	Next Numbers - Automatic	Yes	No
F00021	Next Numbers by Company/Fiscal Year - Automatic	Yes	No
F00022	Unique Key File - Next Available Unique Key	Yes	No
F0006	Business Unit Master	Yes	No
F0007	Workday Calendar	Yes	No
F0007Z1	Work Day Calendar Transaction File	Yes	No
F0008	Date Fiscal Patterns	Yes	No
F0008B	Date Fiscal Patterns - 52 Period Accounting	Yes	No
F0009	General Constants	Yes	No

- Use the links at the top of the report to navigate through the different sections of the report. Each topic contains a comparison of items (by their names, numbers, and descriptions) which exist in one configuration, but not the other.

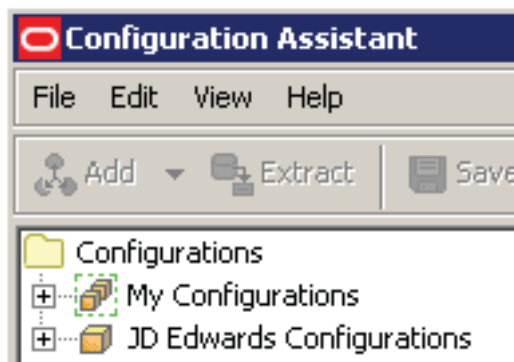


Note

In this context, the term "removed" indicates that no add or append action occurred resulting in a difference between the compared configuration, where the source configuration contains an item while the target configuration does not.

Refresh

From the View menu, if you select Refresh (or use the keyboard shortcut F5), the Configuration Assistant refreshes the screen and returns the tree node display in the left-hand pane to a fully collapsed state. The contents display of the right-hand pane are not affected.



Warning

If you have made changes (which the system indicates by bold portions of a configuration and affected nodes), clicking Refresh will cause the system to disregard any changes that you made but did not save.

Help

When you select Help from the menu selections, you can choose from:

- [Show Log](#)
- [About Configuration Assistant](#)

See Also

The topic [Help Tab](#) in the section: [Welcome to the JD Edwards EnterpriseOne Configuration Assistant](#).

Show Log

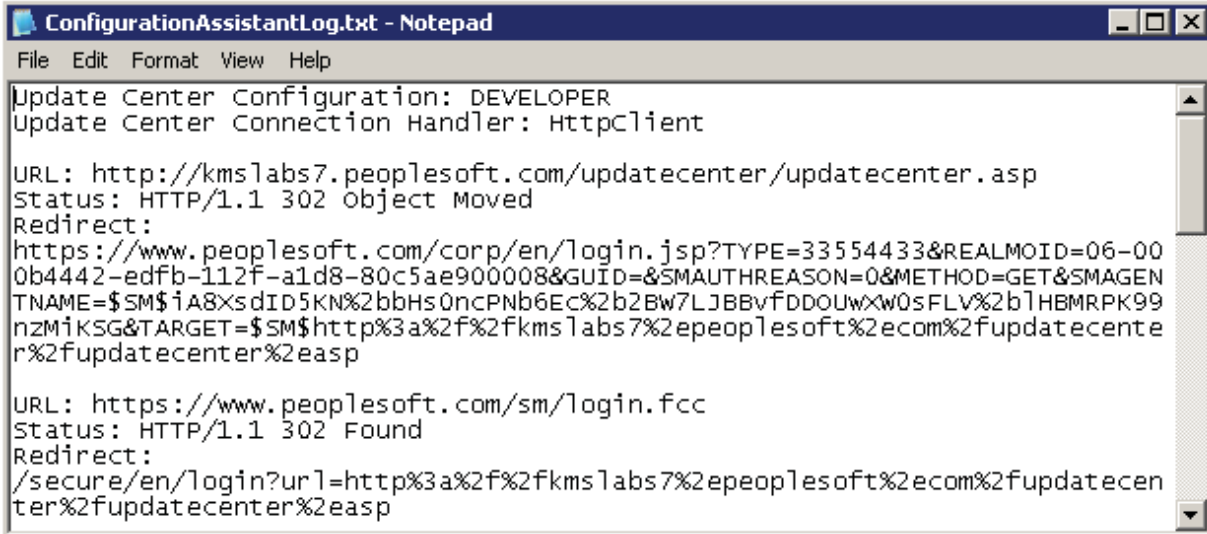
The Configuration Assistant creates a new log file every time you start Configuration Assistant. If a log file exists from a prior startup, it is overwritten.

The type of errors written to this log are typically those for which the Configuration Assistant has specific knowledge, such as Java exceptions or if it detects the Update Center is down.

The log file is written to the Configuration Directory specified on the **My Configurations** tab of **Preferences**, as described in [Using Preferences](#) of this guide. The name of the log file is:

ConfigurationAssistantLog.txt

Below is an example of the contents of a Configuration Assistant log file:



```
ConfigurationAssistantLog.txt - Notepad
File Edit Format View Help
Update Center Configuration: DEVELOPER
Update Center Connection Handler: HttpClient

URL: http://kmslabs7.peoplesoft.com/updatecenter/updatecenter.asp
Status: HTTP/1.1 302 Object Moved
Redirect:
https://www.peoplesoft.com/corp/en/login.jsp?TYPE=33554433&REALMOID=06-00
0b4442-edfb-112f-a1d8-80c5ae900008&GUID=&SMAUTHREASON=0&METHOD=GET&SMAGEN
TNAME=$SM$aXsdID5KN%2bbhs0ncPNb6Ec%2b2BW7LJBBvFDDOUwXw0sFLV%2b1HBMRPK99
nzMikSG&TARGET=$SM$http%3a%2f%2fkmslabs7%2epeoplesoft%2ecom%2fupdatecen
ter%2fupdatecenter%2easp

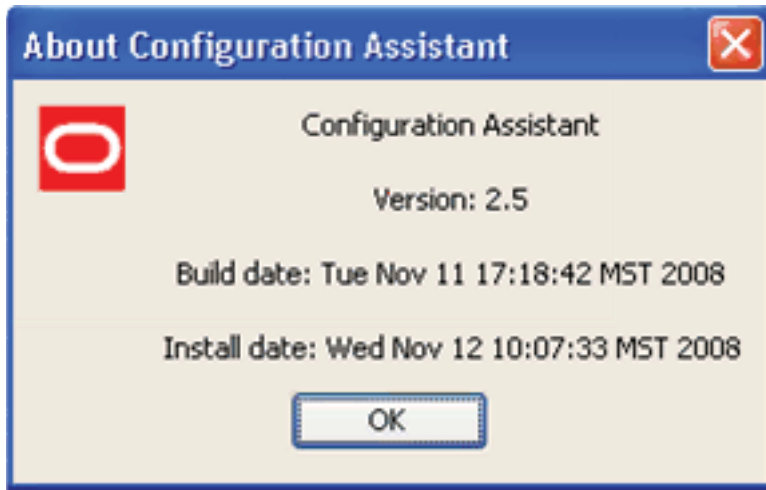
URL: https://www.peoplesoft.com/sm/login.fcc
Status: HTTP/1.1 302 Found
Redirect:
/secure/en/login?url=http%3a%2f%2fkmslabs7%2epeoplesoft%2ecom%2fupdatecen
ter%2fupdatecenter%2easp
```



Tip

The logging levels are not selectable by the end user.

About Configuration Assistant

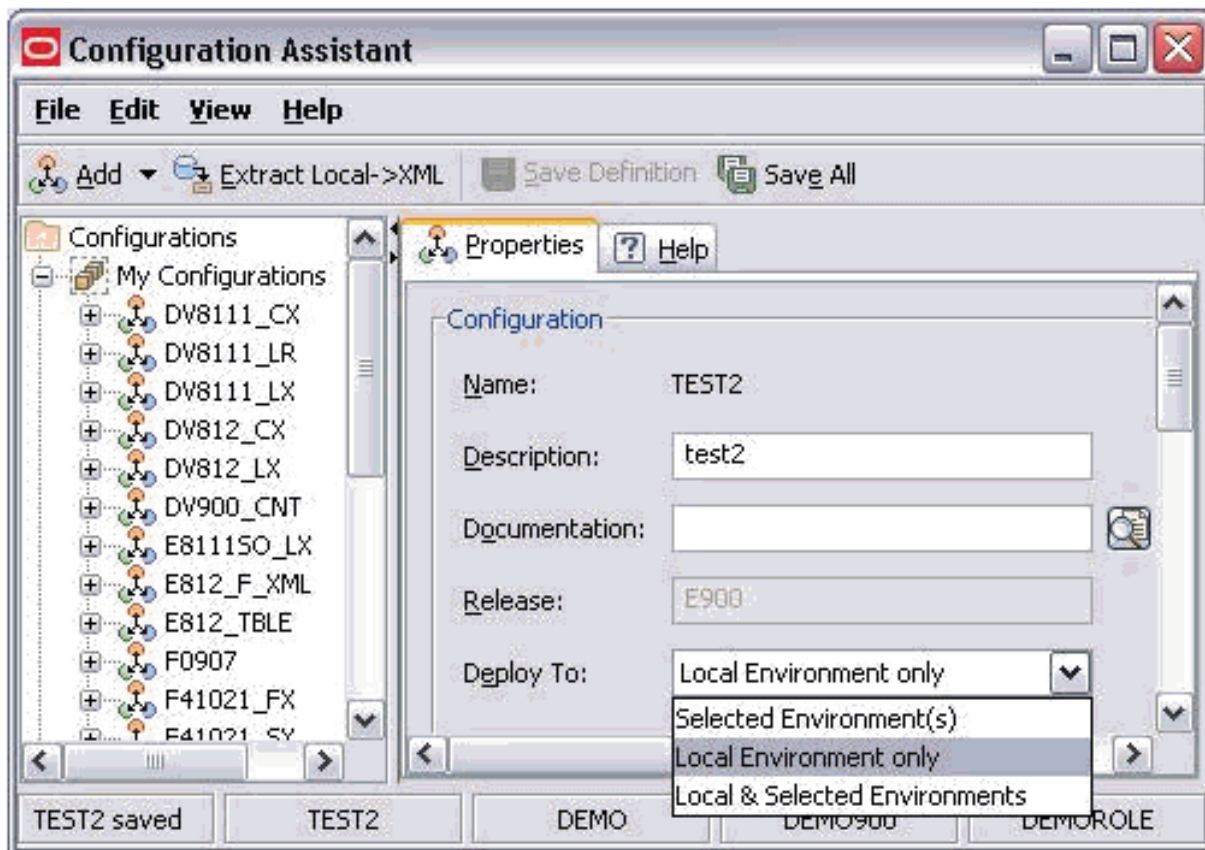


If you choose About Configuration Assistant from the Help menu, a dialog box is displayed that contains this information about Configuration Assistant:

- Version
- Build date
- Install date

Click OK to close the dialog box and return to Configuration Assistant.

My Configurations



The My Configurations folder stores the definitions that the Configuration Assistant tool uses to create the portable archive of a configuration. Your customized My Configurations contain the framework for specific solutions packaged by the Extract function of the Configuration Assistant tool into the portable archive.

You can use any portion of the JD Edwards read-only configurations as a basis for your custom configuration. For a description of the Configuration Assistant tools you can use to duplicate any functionality, refer to [Using Standard Editing Functions \(Cut, Copy, Paste, Delete, Rename\)](#).

These subnodes of My Configurations are described separately:

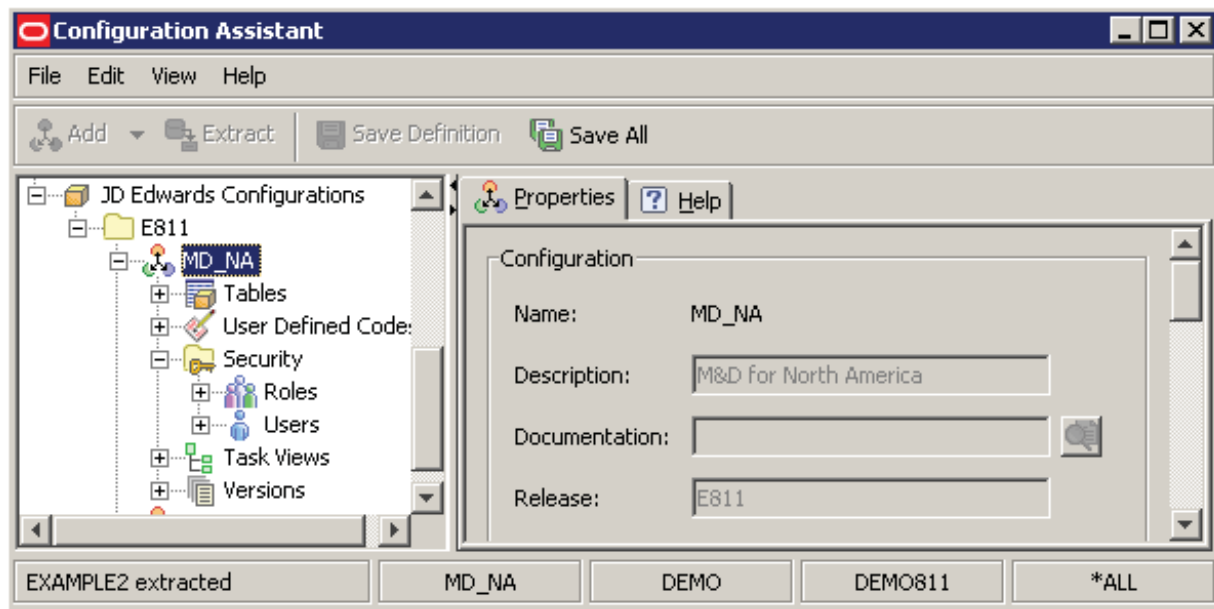
- [Tables](#)
- [Tables](#)
- [OMW Projects and OMW Objects](#)
- [User Defined Codes](#)
- [Security](#)
- [Task Views](#)

- [Versions](#)

See Also

- [Add a New Configuration](#)
- [Extract a Configuration](#)
 - [Troubleshooting Extract](#)
 - [Packaging and Loading an Extracted File onto a Target Machine](#)
- [Save Definition](#)
- [Save All](#)
- The topic [Status Bar](#) in the section [Productivity Hints](#).

JD Edwards Configurations



This folder is used to store predefined sample versions of configurations that were created using the Configuration Assistant tool. The JD Edwards Configurations are all shipped as read-only.

You can review all of the components of each configuration and use all or any portion of them as templates to create your own configurations. Use the Drag and Drop features of the configuration definition tools or standard editing functions to duplicate the desired functionality. For a description of Configuration Assistant tools you can use to duplicate any functionality, refer to [Using Standard Editing Functions \(Cut, Copy, Paste, Delete, Rename\)](#).



Note

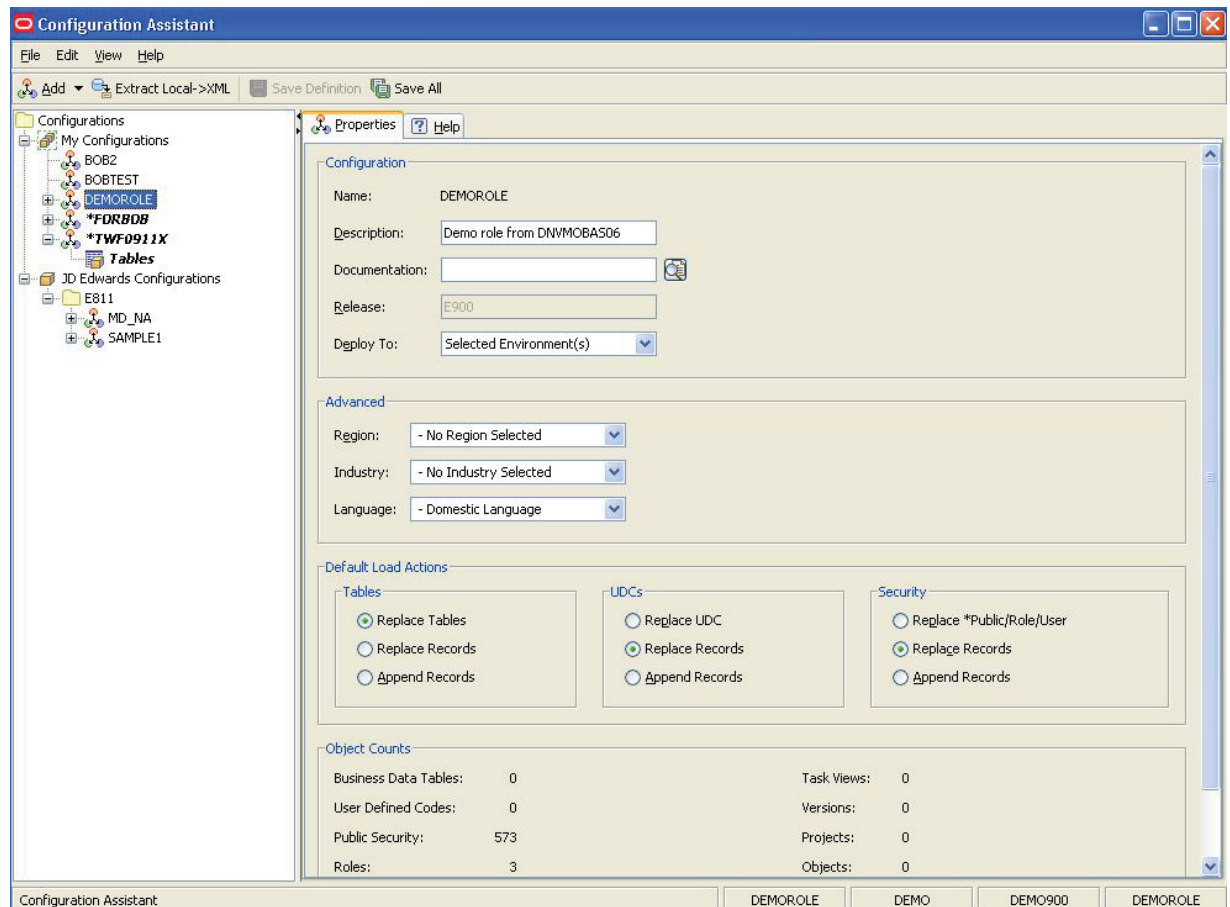
Change Assistant refreshes these definitions each time you connect to the Update Center. As a result, each time you connect you will have access to all new configurations as well as existing ones.

These subnodes of My Configurations are described separately:

- [Tables](#)
- [Tables](#)
- [OMW Projects and OMW Objects](#)
- [User Defined Codes](#)
- [Security](#)
- [Task Views](#)
- [Versions](#)
- The topic [Status Bar](#) in the section [Productivity Hints](#).

Configuration Properties

To access the Properties of any configuration under **My Configurations** and **JD Edwards Configurations**, click on the node for the configuration.



The chapter describes these sections of the Properties screen for configurations:

- [Configuration](#)
- [Advanced](#)
- [Default Load Actions](#)
- [Object Counts](#)

Configuration

The Configuration section of the Configuration Properties describes these fields:

- Name

Displays the name of the configuration selected in the Configurations tree view, either in the **My Configuration** or **JD Edwards Configurations** node. This name was defined when the configuration was created, and is not editable.

- Description

Displays a description of the selected configuration. This Properties Configuration field is editable in this view.



Warning

This field can contain a maximum of 30 characters.

- Documentation

Optionally, you can attach documentation to be delivered with your configuration. For example, you may want to include some special installation instructions for your configuration in the form of an HTML file. Attached documentation that is attached using this field will appear in the Task Assistant, which should be associated with each task in the load schedule.

There is no restriction on the file types that you can attach as documentation.

You can only attach a single physical file from this field.



Tip

If you want to include multiple files as documentation, you can zip them into a single file and attach that. Alternately, you can include the documentation (or any other files) that you want to include in an extracted configuration by placing them in this directory:

```
<Solution Directory>/<solution name>/
```

That is, all contents of the <solution name> directory are automatically included in the .par file created by Configuration Assistant when it performs an Extract. However, even though the files are delivered to a source location using this method, they are not associated with a task as they would be if you used the Documentation field.

This directory is defined in [Using Preferences](#).

- Release

Configuration Assistant populates this value based on the release level of the JD Edwards EnterpriseOne that is signed on the machine on which Configuration Assistant is running at the time the configuration is created.



Tip

Although this **Release** value is programmatically determined when creating a configuration, an enhancement to Change Assistant allows configurations to be applied to any release. If there is a mismatch in the **Release** value during deployment, Change Assistant issues a warning that cautions the user that although cross release application of the configuration is allowed, it should not be done without *full knowledge of the consequences* and thoughtful testing.

- **Deploy To:**

**Note**

Use this option to limit the configuration "consumer's" deployment options when the extracted configuration is deploying using Change Assistant. Use of this option does not limit the user of Configuration Assistant.

Use the pulldown to select the environments to which to deploy:

- Selected Environment(s)

Using this selection you can deploy to any selected environment, which can include local.

- Local Environment Only

Using this section you can only deploy to local, regardless of whether local is explicitly selected or not. When you choose this selection, any other selected environments are ignored.

- Local and Selected Environment

Using this selection you can deploy to all selected environments including local regardless of whether local is explicitly selected or not.

Advanced

The Advanced section of the Configuration Properties describes these fields:

- **Region**

The pulldown list is populated based on the UDC Description01 field for the region (01RS/RC).

For example:

- ANZ - Australia/New Zealand

- **Industry**

The pulldown list is populated based on the UDC Description01 field for the industry (01RS/RI).

For example:

- MD - Manufacturing and Distributing



Caution

The first time you define an industry or region in a configuration the data is retrieved based on the combination of the region and industry UDC values specified. If you subsequently change the industry or region UDC, by design your changed configuration will still contain the original data because the Configuration Assistant only changes the definition of the data within the configuration, not the data itself. When you extract the configuration, the Configuration Assistant assigns any Versions with the changed value.

As an example use case, if you first design a configuration based on the ANZ region, the Configuration Assistant pulls in all record types associated with that UDC. If you subsequently change the region to Singapore, then the previously retrieved data remains the same, while in the configuration the identifier for the records is changed from ANZ to SIN. When you extract the configuration, the Configuration Assistant changes the identifier for Versions from ANZ to SIN. As a result, when the configuration is loaded into a target environment, there are no artifacts from the ANZ region.



Warning

For UDC values for the 01RS/RC and 01RS/RI tables other than the defaults provided by JD Edwards EnterpriseOne:

- Customers should use values in the range from 900 to 999 for your configuration.
- Business partners should contact Oracle to obtain a unique code.

- **Language**

Configuration Assistant populates a pulldown list of languages based on the values of UDC 01/LP. When you select a language from this pulldown, the translation table (that is, “D” tables) records for UDCs and Task Views are included in your configuration.

For example, a language selection on the pulldown might be:

- P – Portuguese



Note

Specifying a language pulls language records into your configuration for UDCs and Task Views only. If you want to include the entire translation table for these, or any other data, you must specifically include translation tables in the [Tables](#) section of your configuration definition.

Default Load Actions

The Default Load Actions section of the Configuration Properties consists of these sections:

- [Tables](#)
- [UDCs](#)
- [Security](#)

Tables

Use the radio buttons to select a data load action into your database when the configuration data is loaded into your target environment:

- **Replace Tables**

The table in the target environment will be replaced with the table in the configuration.



Caution

If any records exist in the target tables to be replaced, they will be lost because this selection indicates you want to replace the table with data from the portable archive created by Configuration Assistant.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

- **Replace Records**

Table records in the target environment will be replaced with the records in the configuration table.



Warning

Replace Records does not clear the table before it copies. It replaces records in the target with the same key. Any new records are appended.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

- **Append Records**

Only records that do not exist in the target environment will be copied from the configuration tables.



Caution

You cannot create a configuration to extract and deliver an empty table. That is, you cannot define an empty table in your source environment to overwrite an existing populated table in your target environment.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

UDCs

Use the radio buttons to select a data load action into your database when the configuration data is loaded into your target environment:

- **Replace UDCs**

The UDCs in the target environment will be replaced with the UDCs in the configuration.

**Caution**

If any UDCs exist in the target tables to be replaced, they will be lost because this selection indicates you want to replace the UDC with data from the portable archive created by Configuration Assistant.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

- **Replace Records**

Table records in the target environment will be replaced with the records in the configuration table.

**Warning**

Replace Records does not clear the table before it copies. It replaces records in the target with the same key. Any new records are appended.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

- **Append Records**

Only records that do not exist in the target environment will be copied from the configuration tables.

**Caution**

You cannot create a configuration to extract and deliver an empty table. That is, you cannot define an empty table in your source environment to overwrite an existing populated table in your target environment.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

Security

Use the radio buttons to select a data load action into your database when the configuration data is loaded into your target environment:

- **Replace *Public/Role/User**

The *Public/Role/User in the target environment will be replaced with the *Public/Role/User in the configuration.



Caution

If any *Public/Role/User exists in the target tables to be replaced, they will be lost because this selection indicates you want to replace the *Public/Role/User with data from the portable archive created by Configuration Assistant.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

- **Replace Records**

Table records in the target environment will be replaced with the records in the configuration table.



Warning

Replace Records does not clear the table before it copies. It replaces records in the target with the same key. Any new records are appended.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

- **Append Records**

Only records that do not exist in the target environment will be copied from the configuration tables.



Caution

You cannot create a configuration to extract and deliver an empty table. That is, you cannot define an empty table in your source environment to overwrite an existing populated table in your target environment.

You should always beware of data integrity concerns, especially in production data environments. Refer to [Backing Up Your Target Database Environment](#).

Object Counts

This section provides quantity statistics of the selected configuration for these individual items:

- Business Data Tables
- User Defined Codes
- Public Security
- Roles
- Users
- Task Views
- Versions
- Projects
- Objects

Tables

The Tables node lists and describes JD Edwards EnterpriseOne tables that are available in Configuration Assistant. You typically use Configuration Assistant with configuration tables and not transactional tables. Oracle provides a way to identify just the configuration tables using [Search](#) and [All Tables](#) functions.



Tip

In addition to the tables that Configuration Assistant automatically identifies as transactional, you can manually select D tables if you need them.



Caution

Because JD Edwards EnterpriseOne Tools Release 8.98 uses the XML format, if the target table has new columns, the database default value for the new column is used for each record added. It is recommended that configurations containing such tables should not be done without *full knowledge of the consequences* and thoughtful testing.

You can include all or a subset of these tables in your configuration. As it retrieves the tables from the JD Edwards EnterpriseOne database, Configuration Assistant provides a set of known and assigned attributes assigned to these tables, which are helpful in determining their contents and suitability for inclusion in your configuration:

- Table number (as assigned by JD Edwards EnterpriseOne)
- Number of rows in the table
- Load action (as defined with Configuration Assistant; the action that will be performed in the target environment for this configuration)
- Data class
- Copy data
- Description
- Object use
- System code
- Reporting code
- Data source

To populate the Tables node, you can use these tabs:

- [Search](#)
- [All Tables](#)

See Also

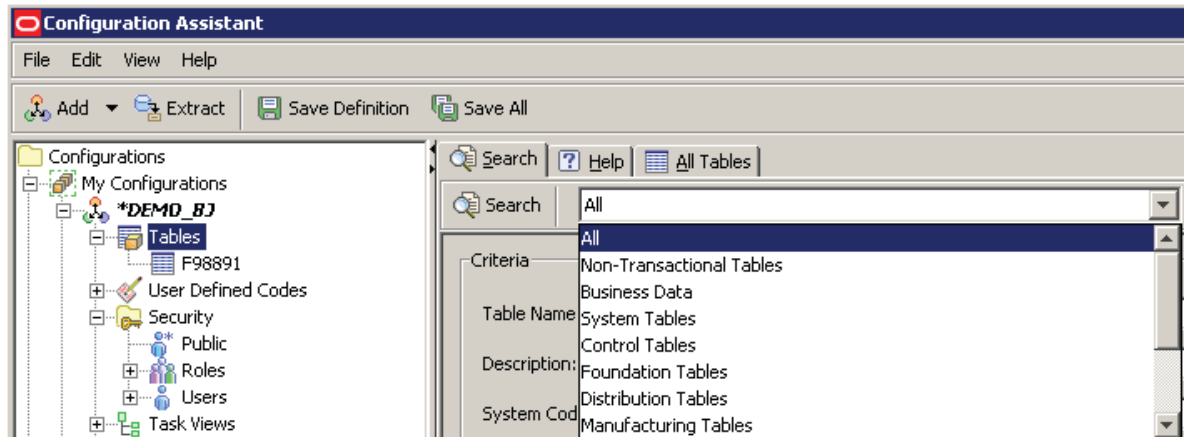
These topics in the Productivity Hints:

- [Adding or Removing Items to Your Configuration](#)
- [Edit Functions in Specific Nodes](#)
- [Folder Structure in the Configuration Assistant](#)
- [Icons Used by Configuration Assistant](#)
- [Multiple Selects and Deselects](#)
- [Panels in the Configuration Assistant](#)
- [Search Drop-Down List - Selecting All](#)
- [Search Results](#)
- [Search Strings - Valid Delimiters](#)
- [Search Strings - Wild Cards](#)
- [Sorting Within Columns in a Grid](#)
- [Status Bar](#)

Search

With the Tables node selected, the Search tab provides these functions:

- Search button
- Pulldown selections (predefined database query)



Pulldown selections include predefined database queries. When you make a selection the Table Name field is automatically populated with the table names associated with the selection. These pulldown selections of predefined database queries and their predefined tables are:

- Non-Transactional Tables

The list of tables was created by Oracle applications development. It does not include any system code 74, 75, or 76 tables. When you choose this search type the Table Name field is automatically populated with the list, which includes hundreds of tables. To view the complete list, you can manually copy the contents out of the field display and into a readable form.

- Business Data

Includes all tables that have a data class of B, which is automatically populated in the applicable Criteria field.

- System Tables

Includes all tables that have a data class of S, which is automatically populated in the applicable Criteria field.

- Control Tables

Includes all tables that have a data class of T, which is automatically populated in the applicable Criteria field.

- Foundation Tables

Includes all tables for system code 00.

- Distribution Tables

Includes all tables for system codes 40, 41, 42, 43, 43Q, 45, 46, 49, 40, 40G, 40R, 41B, 43C, 43E, 46L,

and 46R.

- Manufacturing Tables

Includes all tables for system codes 30, 31, 31B, 32, 34, 37, 40, 41, F30L, F31, F31K, and F34R.

- Search Criteria Fields

- Table Name
- Description
- System Code
- Reporting Code
- Data Class
- Copy Data Flag

All Tables

When you select the Tables tab in the right panel, the Configuration Assistant displays a list of all JD Edwards EnterpriseOne tables in the Tables datasource for the environment in which you are logged on.

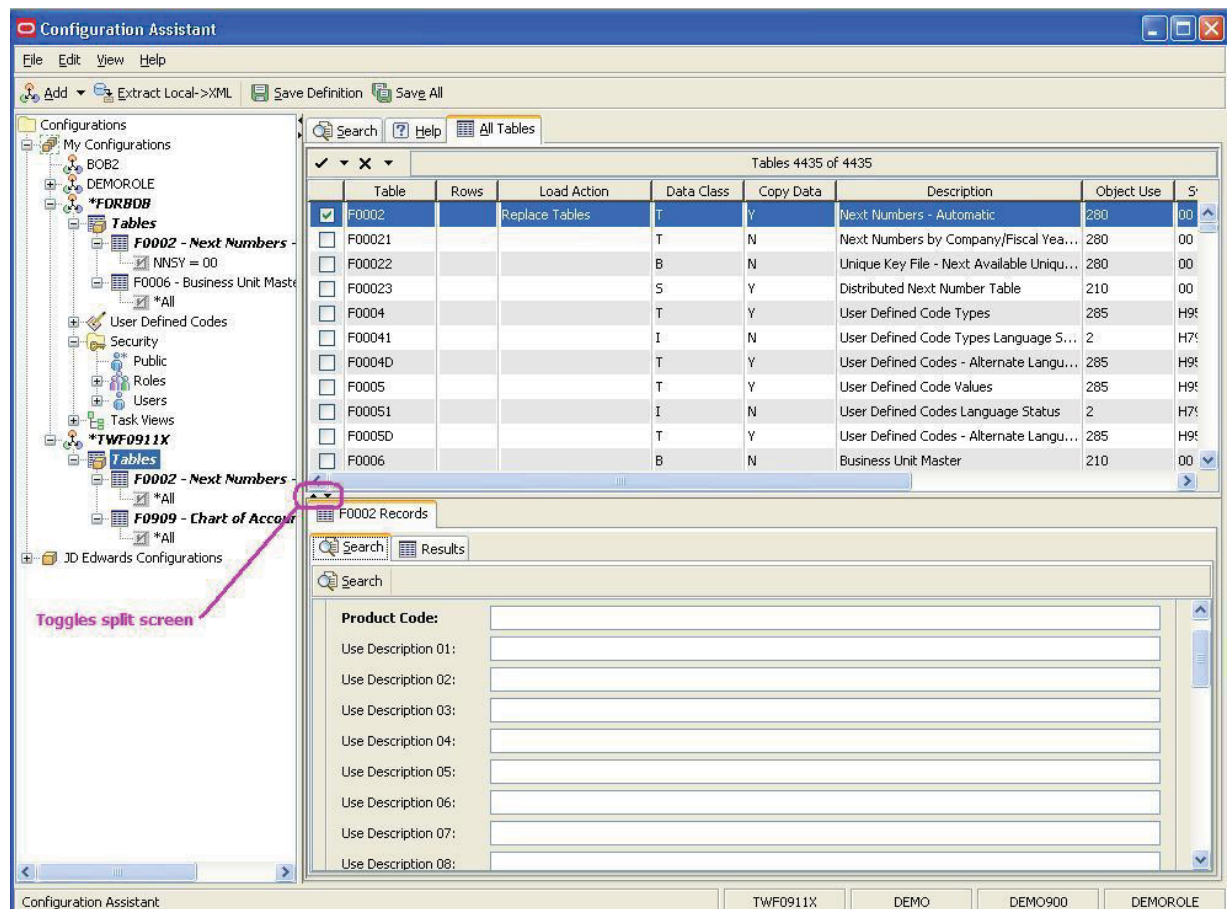
The grid contains a variety of information about each table, including the current row count.

By default, the lists of Tables is shown with a split screen where the top portion lists all the tables, and the bottom portion is used to display the records in the specified table. You can click the up and down arrow in the separator bar to toggle the split screen on and off (refer to screen shot below for location of these arrows).



Note

The system performs the data retrieval and table analysis in method that improves memory management. The table search starts the first time you click on the Table node of a configuration. The table record count is not calculated until you select a table. In order to select all tables with data, you can use the check pulldown option to select **Tables With Data**, which instructs the system to calculate the record count on all the tables. You can then deselect unwanted tables. For details on using the check option, refer to [Multiple Selects and Deselects](#).



Note

The Tables tree node in the left pane displays subnodes for selected records if All Tables or Selected Tables are chosen. The tree subnode shows record level detail such as ***All** records or the **Primary Key for Selected Records**.

You can use the lower half of the All Tables split panel to search and select individual records within a table. To view a specific record within a table, use the checkbox in the top half of the split panel to select a table. The bottom half of the split panel displays each record, where bolded entries indicate key fields (not necessary the Primary Key). To search for specific key values within a record, enter a value in the data entry field on the Search panel and click the Search tab. Individual Results tabs are created to display the results of each search.



Caution

A value of blank in any field indicates a wild card search for any value. Because tables with a large number of records may consume more memory than available, Configuration Assistant displays a warning is given if a search is going to return too much data. In this case, you should either narrow the search or select the entire table.



Tip

Hover Text. You can hover over any field description within a record to ascertain the literal key name. For example, in F0002, if you hover on Product Code the key name NNSY is displayed.



Tip



None Exist Icon. This icon in the Rows column of a listed table indicates an error condition for a table. For example, it could indicate a table spec mismatch, DD item is missing, or that the table does not exist in the datasource to which it is mapped.

OMW Projects and OMW Objects

You can include all or a subset of OMW Projects and OMW Objects in your configuration. As it retrieves the OMW Projects and OMW Objects from the JD Edwards EnterpriseOne database, Configuration Assistant provides a set of known and assigned attributes assigned to these projects, which are helpful in determining their contents and suitability for inclusion in your configuration:

OMW Projects

- Project Name
- Description
- Status
- Type
- System Code
- Release

OMW Objects

- Object
- Status
- Type
- System Code
- Reporting Code

To populate the OMW Projects node, you can use these tabs:

- [Search](#)
- [All Projects](#)

See Also

These topics in the Productivity Hints:

- [Adding or Removing Items to Your Configuration](#)
- [Edit Functions in Specific Nodes](#)
- [Folder Structure in the Configuration Assistant](#)

- Icons Used by Configuration Assistant
- Multiple Selects and Deselects
- Panes in the Configuration Assistant
- Search Drop-Down List - Selecting All
- Search Results
- Search Strings - Valid Delimiters
- Search Strings - Wild Cards
- Sorting Within Columns in a Grid
- Status Bar

Search

With the OMW Projects node selected, the Search tab provides these functions:

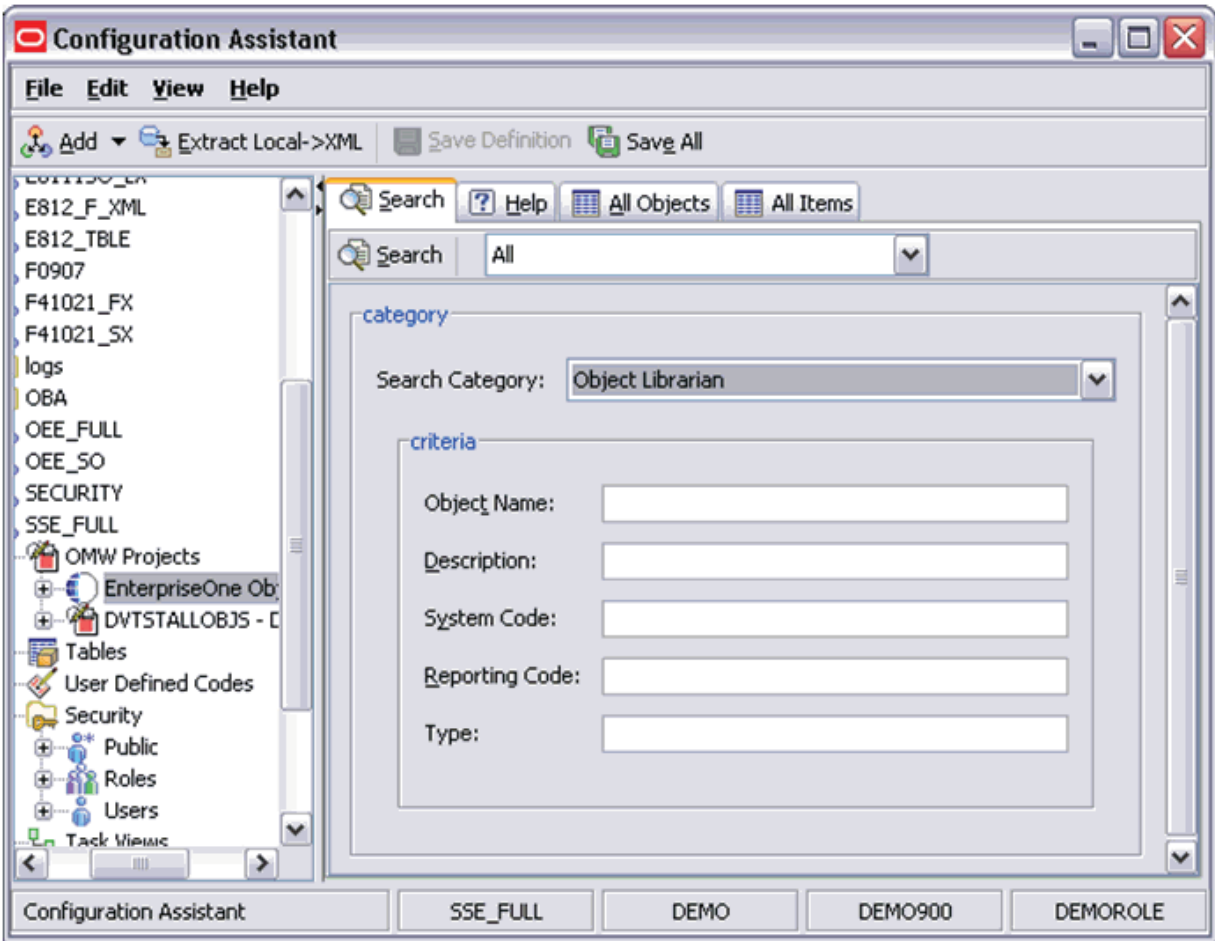
- Search button
- Pulldown selection (All)
- Search Criteria Fields
 - Project Name
 - Description
 - System Code
 - Status
 - Type
 - Release

Under the OMW Projects node, with EnterpriseOne Objects node selected, you can choose from these Object Search Categories:

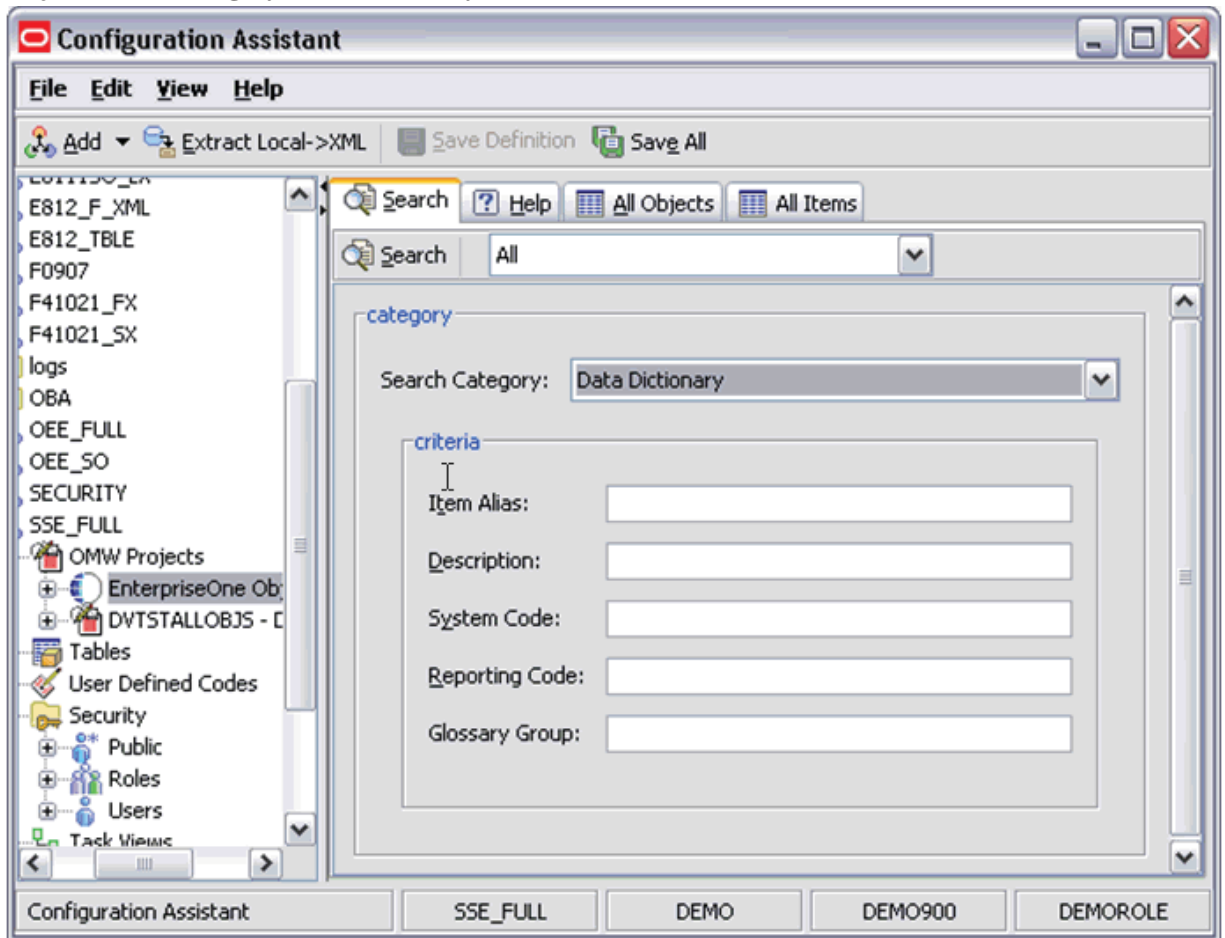
- Object Librarian (APPL, BSFN, BSVW, DSTR, TBLE, UBE)
- Data Dictionary
- OMW Project
- Workflow
- User Overrides
- Business Service Property
- Report Definition
- XMLP Publisher Object (Business Intelligence)

The following screens show example searches for each of the above listed Object Search Category.

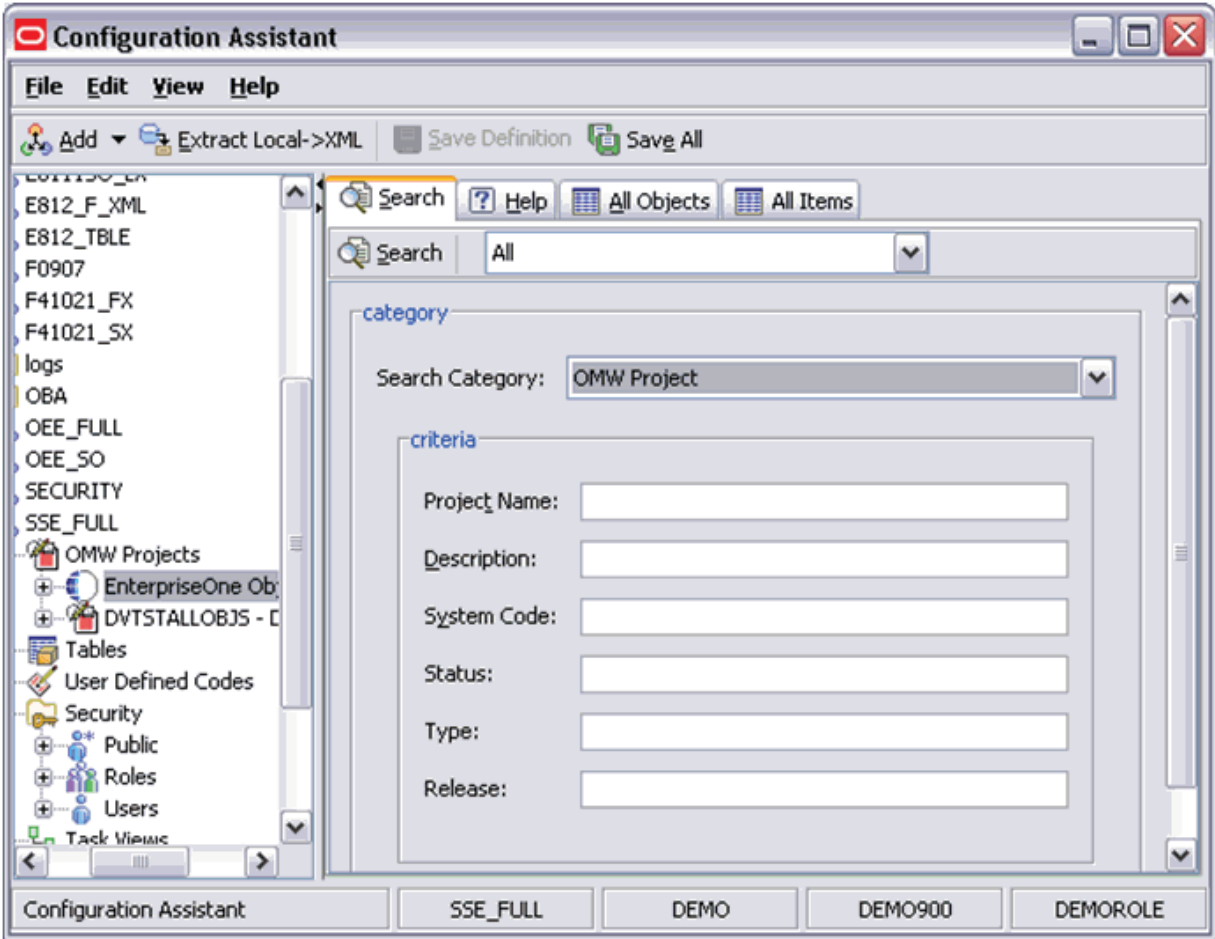
Object Search Category: Object Librarian.



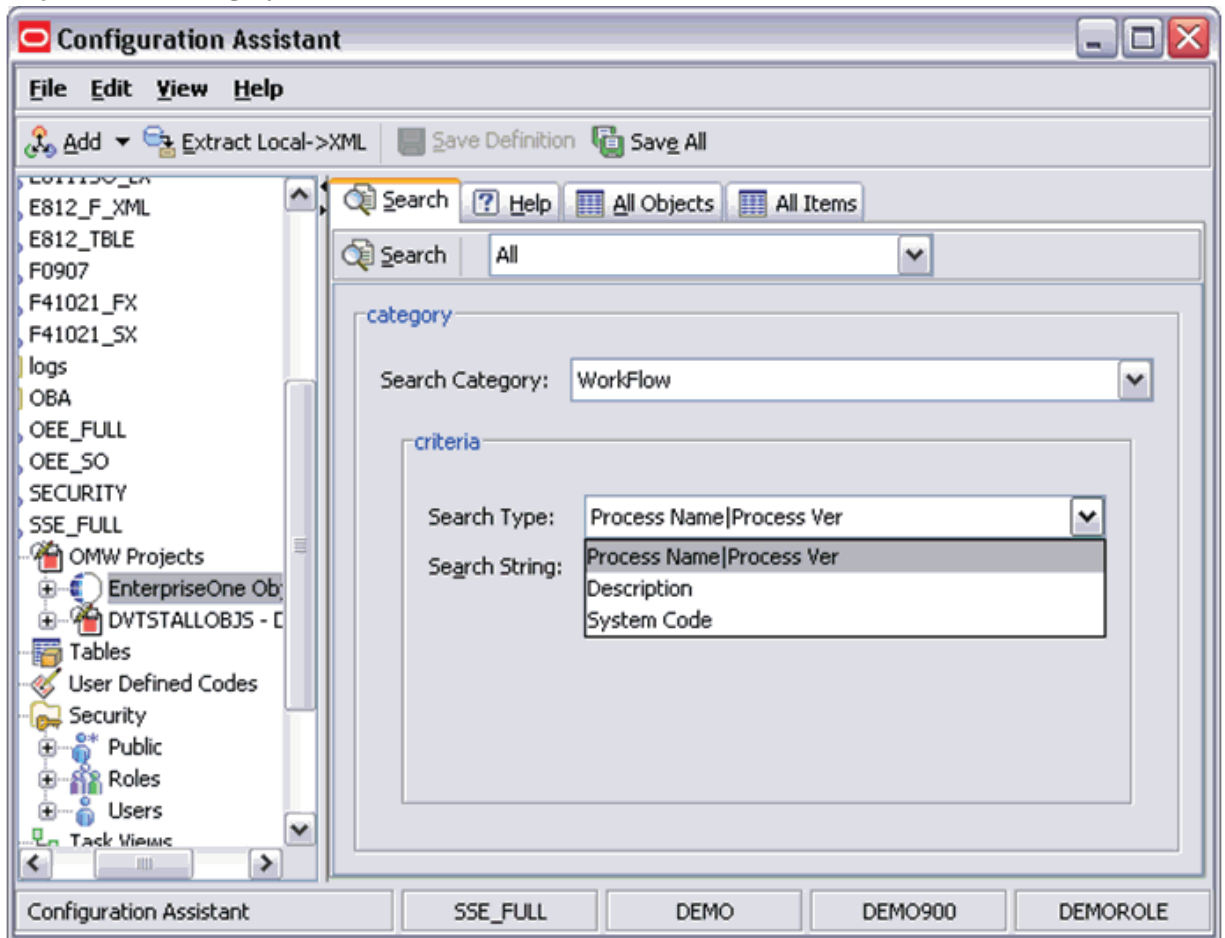
Object Search Category: Data Dictionary.



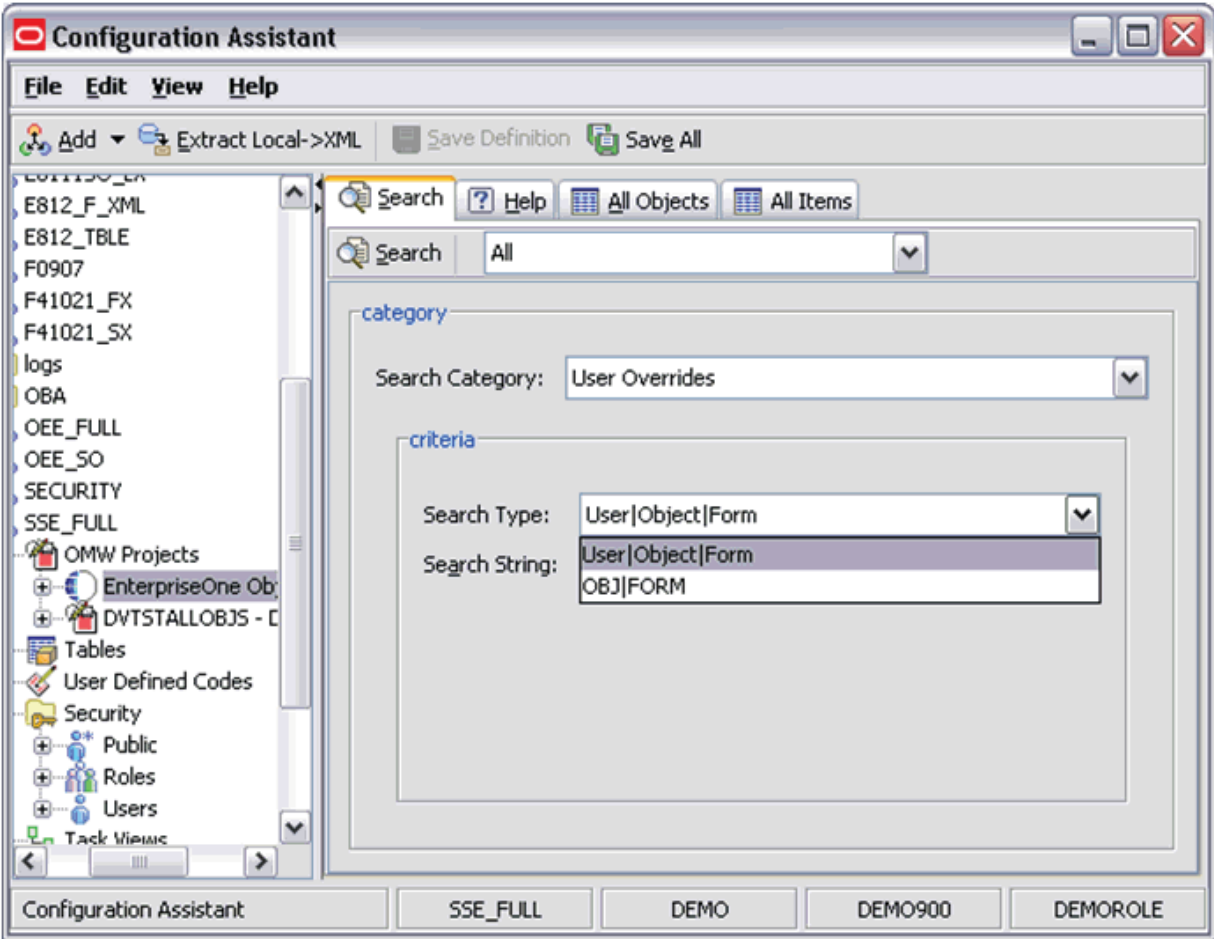
Object Search Category: OMW Project.



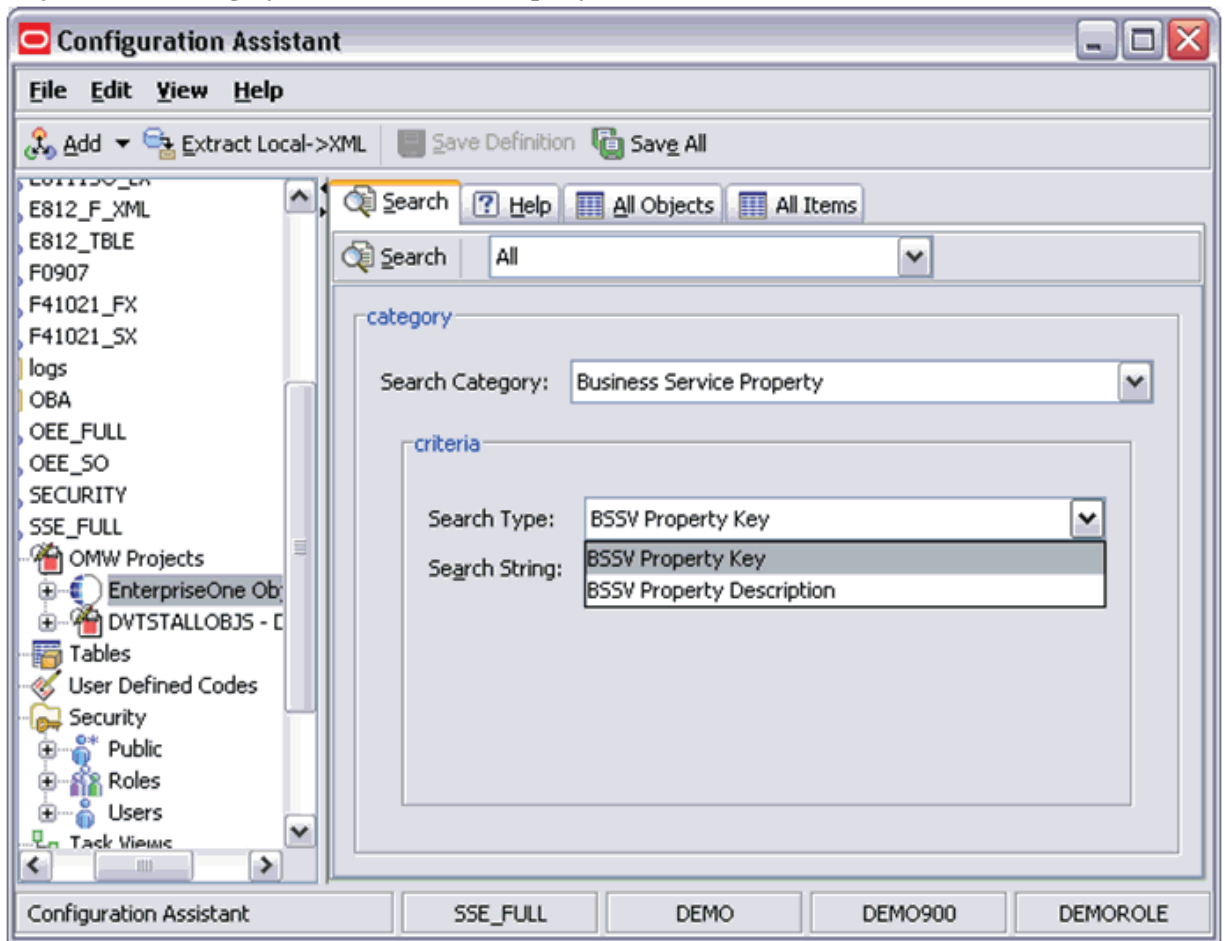
Object Search Category: WorkFlow.



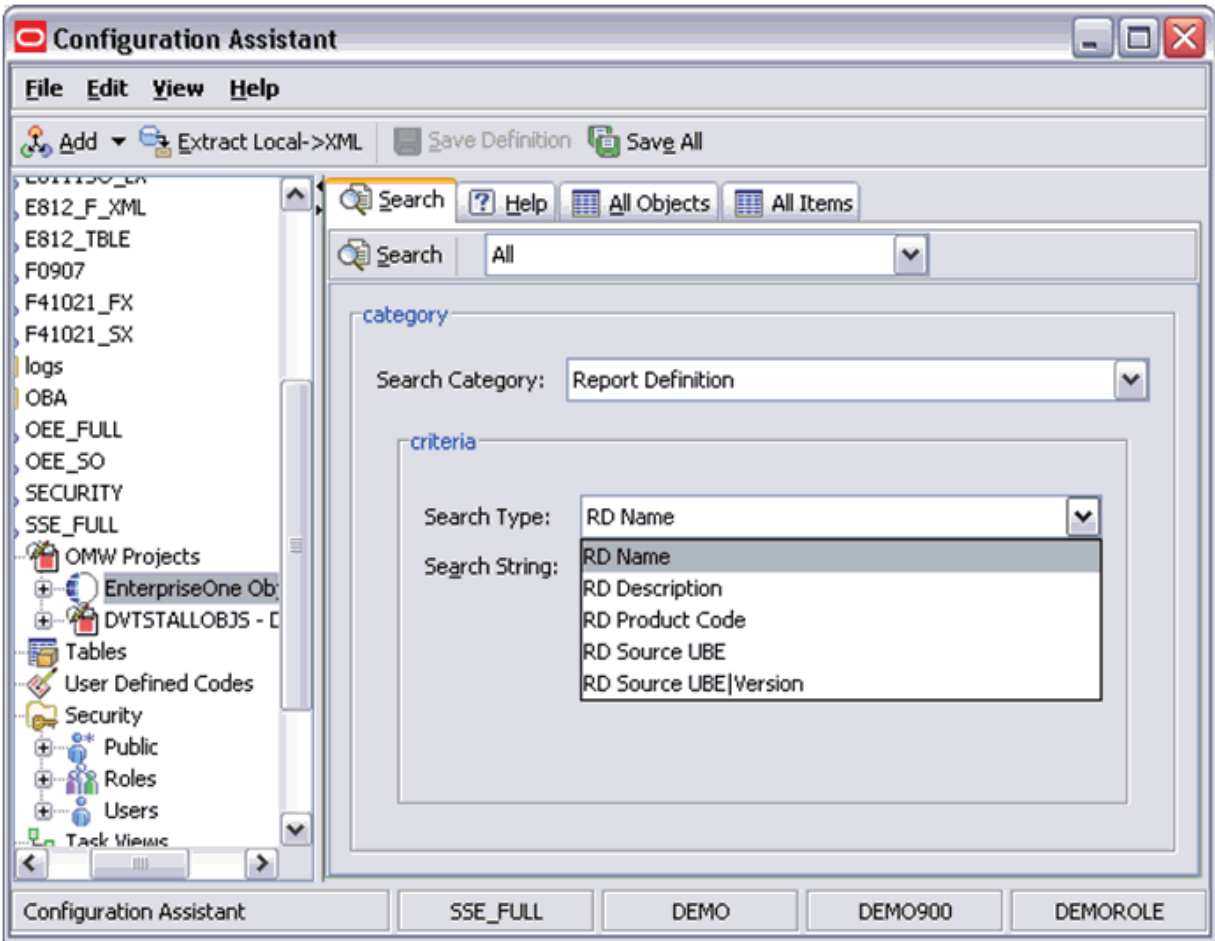
Object Search Category: User Overrides.



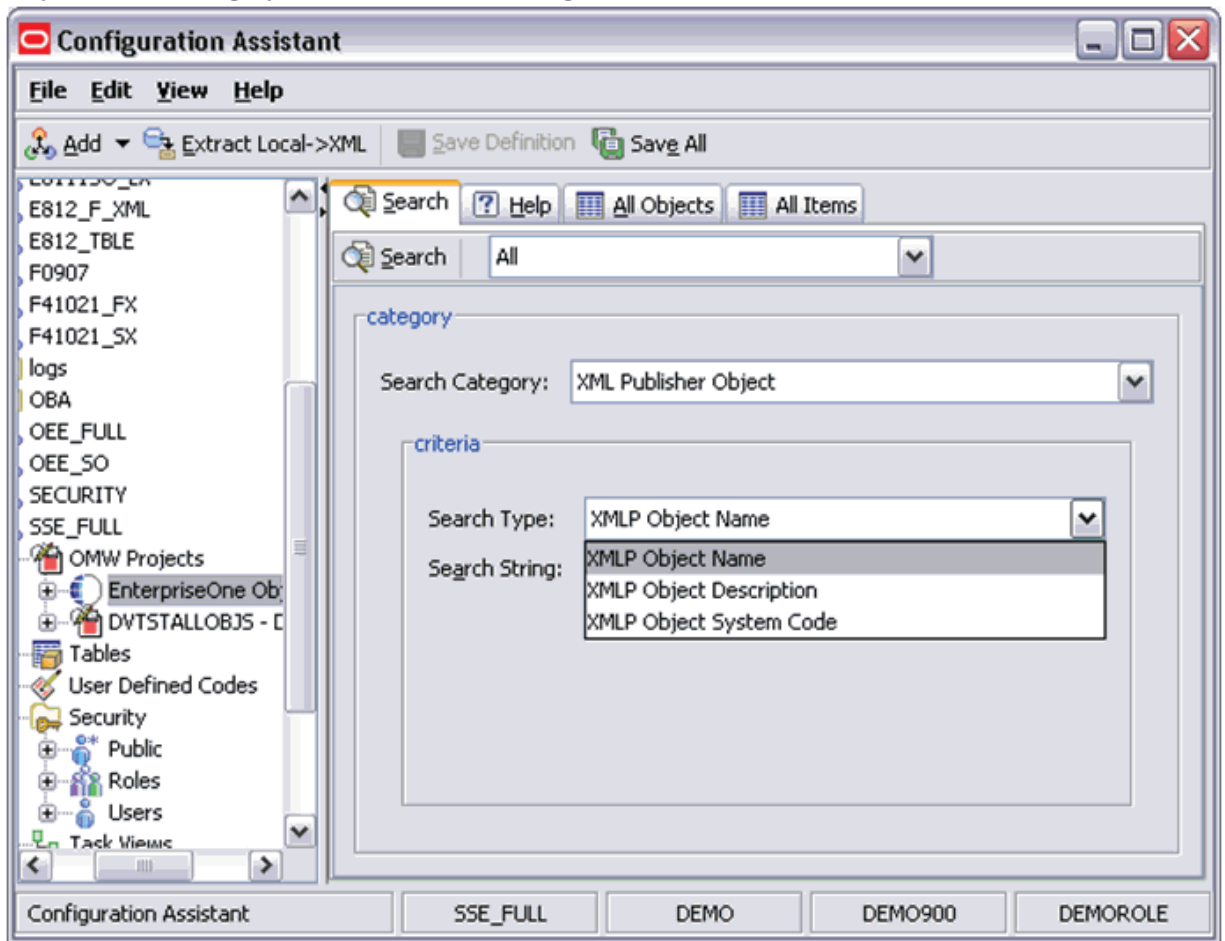
Object Search Category: Business Service Property.



Object Search Category: Report Definition.



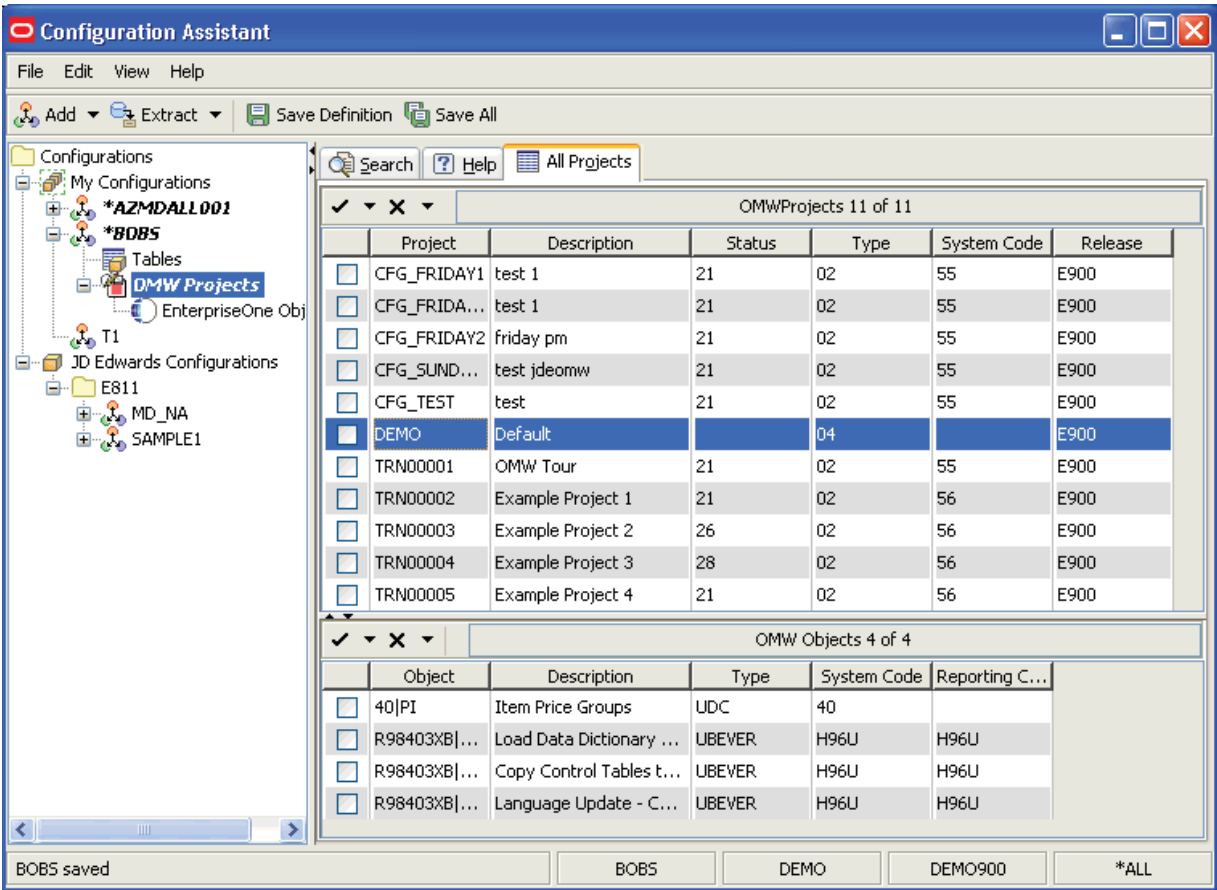
Object Search Category: XMLP (Business Intelligence).



All Projects

When you select the Tables tab in the right panel, the Configuration Assistant displays a list of all JD Edwards EnterpriseOne OMW Projects and OMW Objects in the OMW Projects datasource for the environment in which you are logged on.

The grid contains a variety of information about each OMW Project and OMW Object.



User Defined Codes

The User Defined Codes node lists and describes JD Edwards EnterpriseOne UDCs which Configuration Assistant has identified from the source data source. You can include all or a subset of these UDCs in your configuration. As it retrieves the UDCs from the JD Edwards EnterpriseOne database, Configuration Assistant provides a set of known and assigned attributes assigned to these tables, which are helpful in determining their contents and suitability for inclusion in your configuration. Different attributes are displayed in the right-hand pane depending on the level of detail:

- **Upper portion of right-hand pane**
 - Product Code
 - Code Type
 - Description
- **Lower portion of right-hand pane**
 - Product Code
 - Code Type
 - Value
 - Description 01
 - Description 02



Note

For any selected records, the non-changeable default load action is to Replace Records.



Caution

Some UDCs contain technical values related to your JD Edwards EnterpriseOne environment setup. Carefully consider how these might affect your target environment if you choose to extract all UDCs.

To populate the User Defined Codes node, you can use these tabs:

- [Search](#)
- [All User Defined Codes](#)

See Also

These topics in the Productivity Hints:

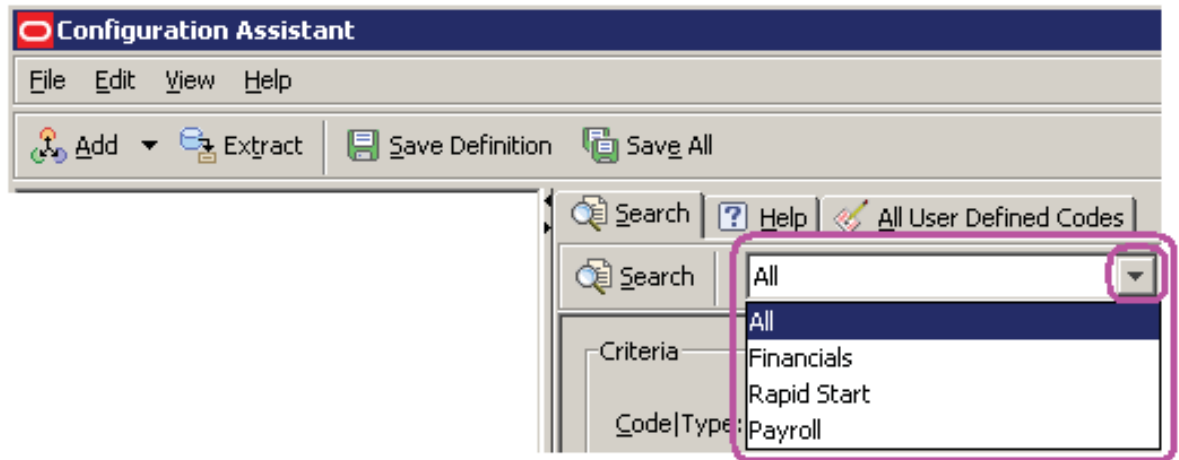
- [Adding or Removing Items to Your Configuration](#)
- [Edit Functions in Specific Nodes](#)

- [Folder Structure in the Configuration Assistant](#)
- [Icons Used by Configuration Assistant](#)
- [Multiple Selects and Deselects](#)
- [Panels in the Configuration Assistant](#)
- [Search Drop-Down List - Selecting All](#)
- [Search Results](#)
- [Search Strings - Valid Delimiters](#)
- [Search Strings - Wild Cards](#)
- [Sorting Within Columns in a Grid](#)
- [Status Bar](#)

Search

With the User Defined Codes node selected, the Search tab provides these functions:

- Search button
- Pulldown selections from predefined searches by industry or other category (for example, Financials)

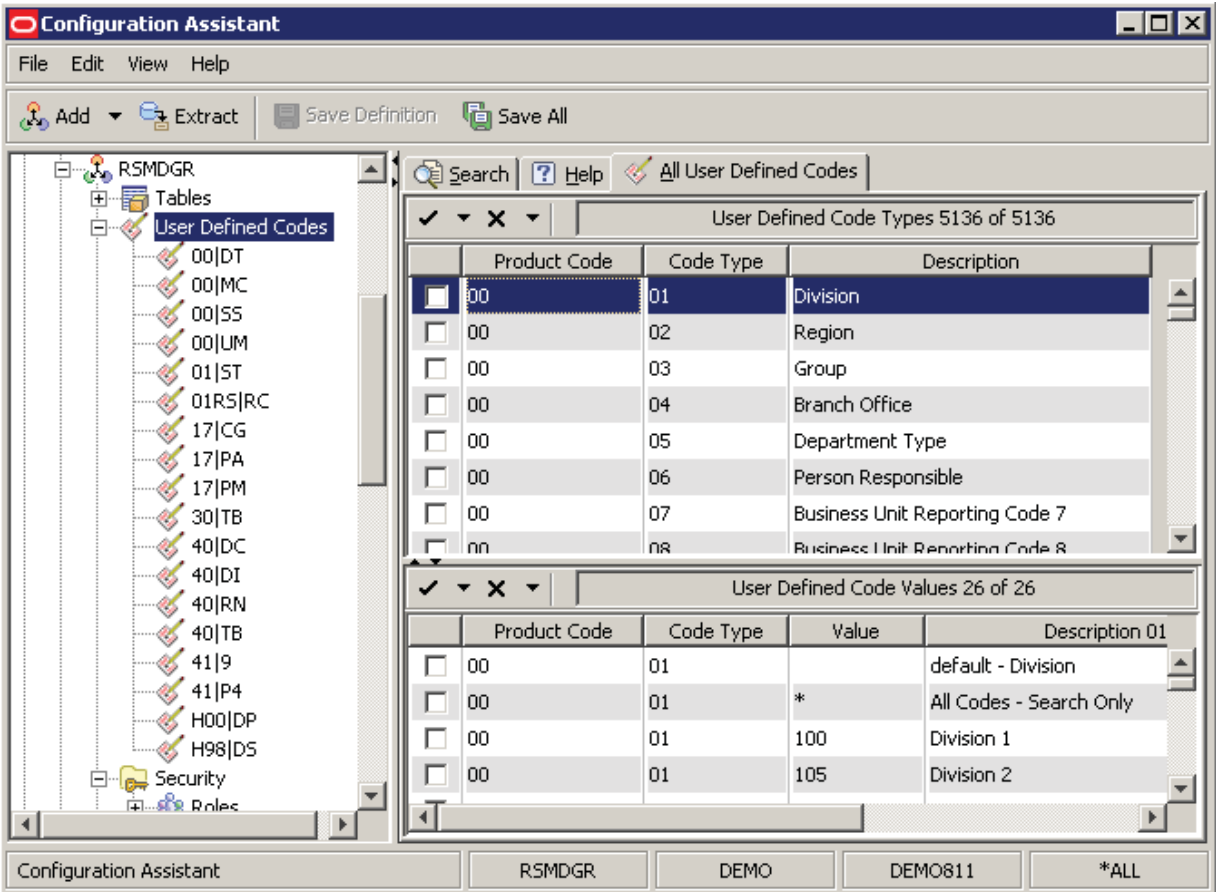


- Search Criteria Fields
 - Code|Type (combination search for code type pairs, for example: 01|AB and 02|CD)
 - Product Code
 - Code Type
 - Type Description
 - Value
 - Value Description 01
 - Value Description 02

All User Defined Codes

When you select the All User Defined Codes tab in the right panel, the Configuration Assistant displays a list of all JD Edwards EnterpriseOne UDCs in the User Defined Codes datasource for the environment in which you are logged on.

The grid contains a variety of information about each UDC, including types and descriptions.

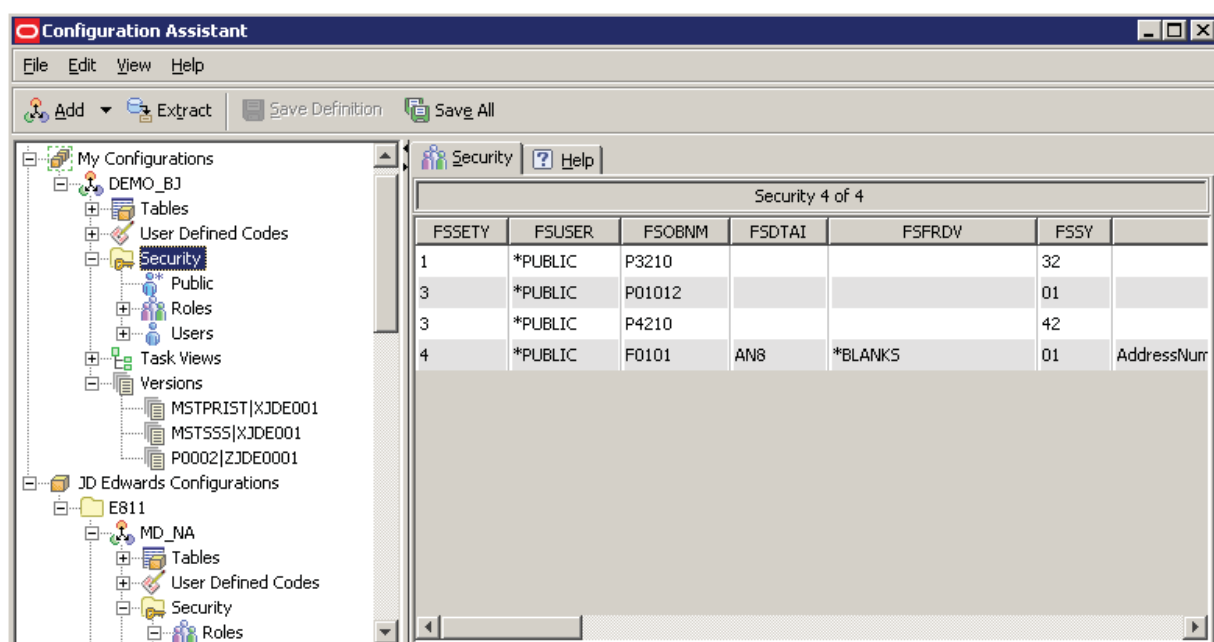


Security

The Security node contains these subnodes:

- [Public](#)
- [Roles](#)
- [Users](#)

When you click the Security tab, you are presented with a grid that displays all currently defined security records for the selected node:

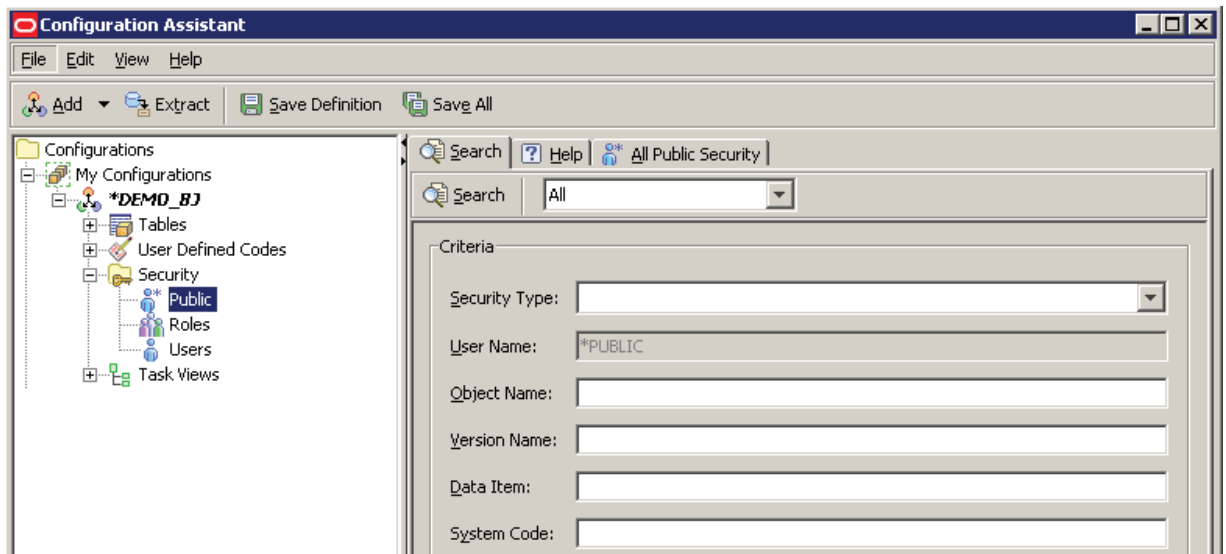


See Also. These topics in the Productivity Hints:

- [Adding or Removing Items to Your Configuration](#)
- [Edit Functions in Specific Nodes](#)
- [Folder Structure in the Configuration Assistant](#)
- [Icons Used by Configuration Assistant](#)
- [Multiple Selects and Deselects](#)
- [Panels in the Configuration Assistant](#)
- [Search Drop-Down List - Selecting All](#)

- [Search Results](#)
- [Search Strings - Valid Delimiters](#)
- [Search Strings - Wild Cards](#)
- [Sorting Within Columns in a Grid](#)
- [Status Bar](#)

Public



With the Public node selected, the Search tab provides these functions:

- Search button
- Pulldown selections from predefined searches
- Search Criteria Fields
 - Security Type

You can use the pulldown to select one of these security types:

- 1 - Action Security
- 2 - Column Security
- 3 - Application Security
- 4 - Row Security
- 5 - Processing Option Security
- 6 - Hyper Exit Security
- 7 - External Calls Security

- User Name

The system displays a static value of ***PUBLIC** for this field. This value cannot be changed.

- Object Name
- Version Name
- Data Item

- System Code



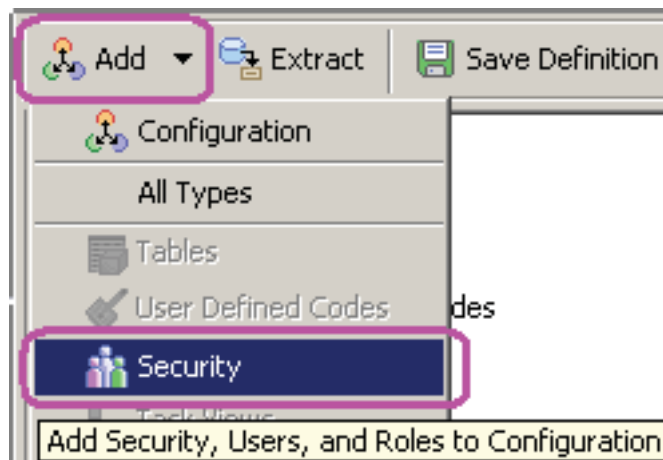
Note

For any selected records, the non-changeable default load action is to Replace Records.



Tip

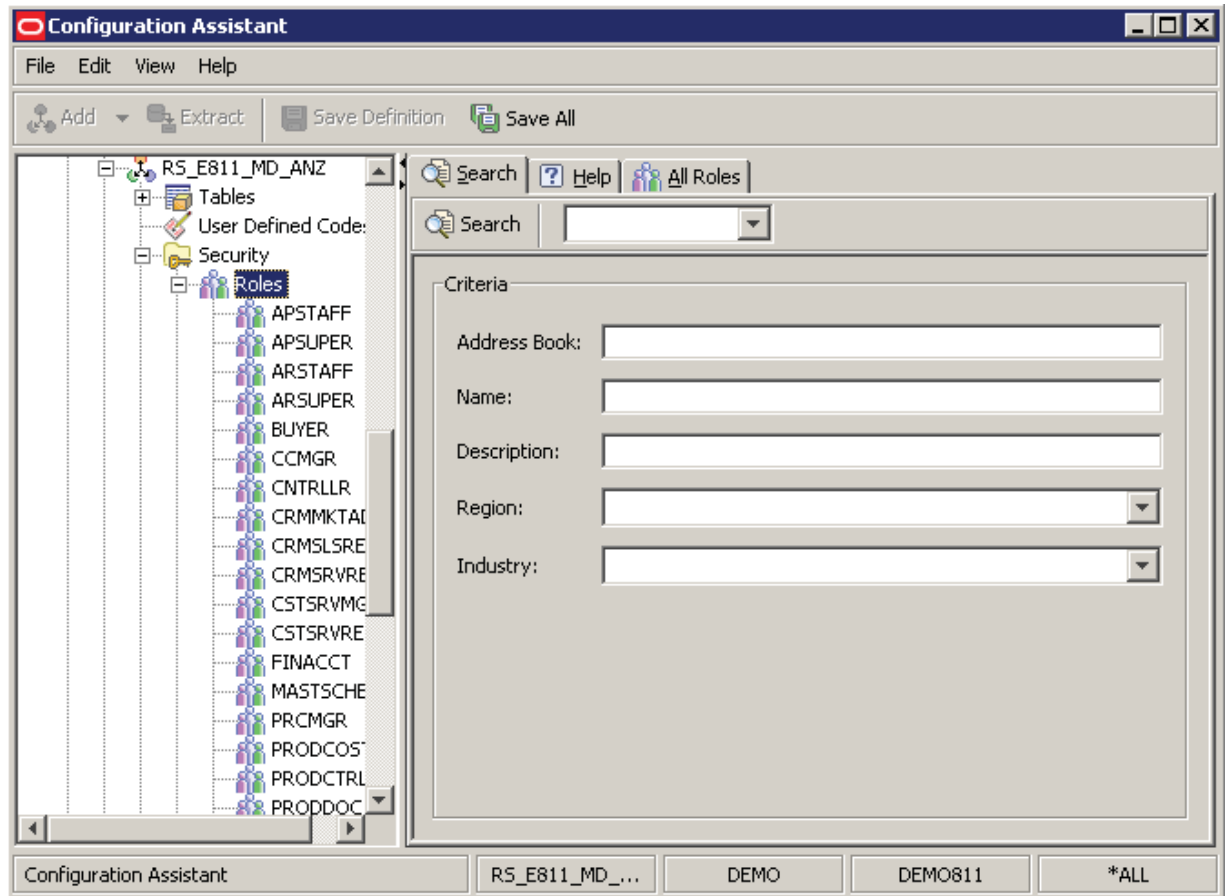
If you have a configuration that was created by a prior version of Configuration Assistant that did not support this function, the security node in the tree view it will not have a Public node underneath it. You can add the Public node by using the Add > Security button.



This displays all three security nodes (Public, Role, User) underneath the Security node.



Roles



Caution

When you use Configuration Assistant to select User or Role records, the system also selects any corresponding security records that are set up for the User and Role, including: Action, Solution Explorer, Environment, and Application. The system automatically tags the selected roles with the information provided for the Region and Industry fields that you used when you added the configuration properties when you extract the data.

With the Roles node selected, the Search tab provides these functions:

- Search button
- Pulldown selections from predefined searches
- Search Criteria Fields
 - Address Book



Warning

User input in this field is restricted to numeric data. That is, no alpha characters are allowed in order to avoid database errors.

- Name
- Description
- Region
- Industry

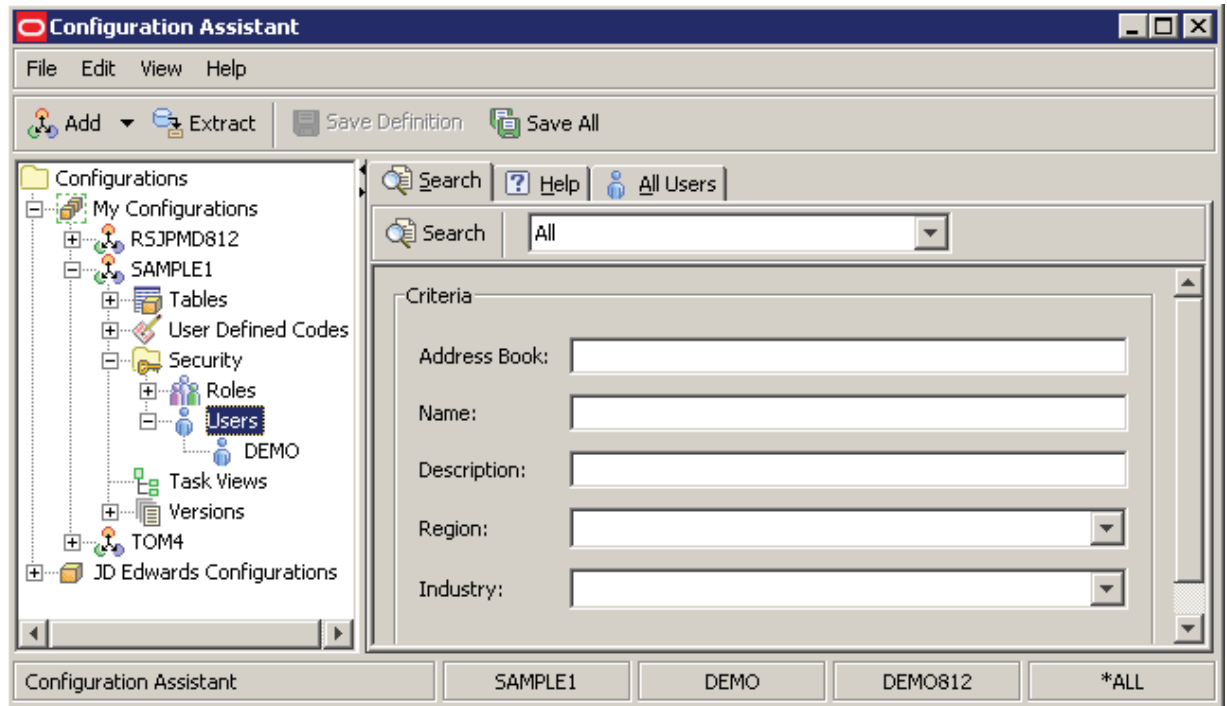
**Note**

For any selected records, the non-changeable default load action is to Replace Records.

**Tip**

For searches, you can use the pulldowns to choose from predefined values for the Region and Industry fields. Refer to [Configuration Properties - Advanced Tab](#) for a description of the UDC values that are used by Configuration Assistant to populate these pulldown selections.

Users



With the Users node selected, the Search tab provides these functions:

- Search button
- Pulldown selections from predefined searches
- Search Criteria Fields
 - Address Book



Warning

User input in this field is restricted to numeric data. That is, no alpha characters are allowed in order to avoid database errors.

- Name
- Description
- Region
- Industry



Note

For any selected records, the non-changeable default load action is to Replace Records.

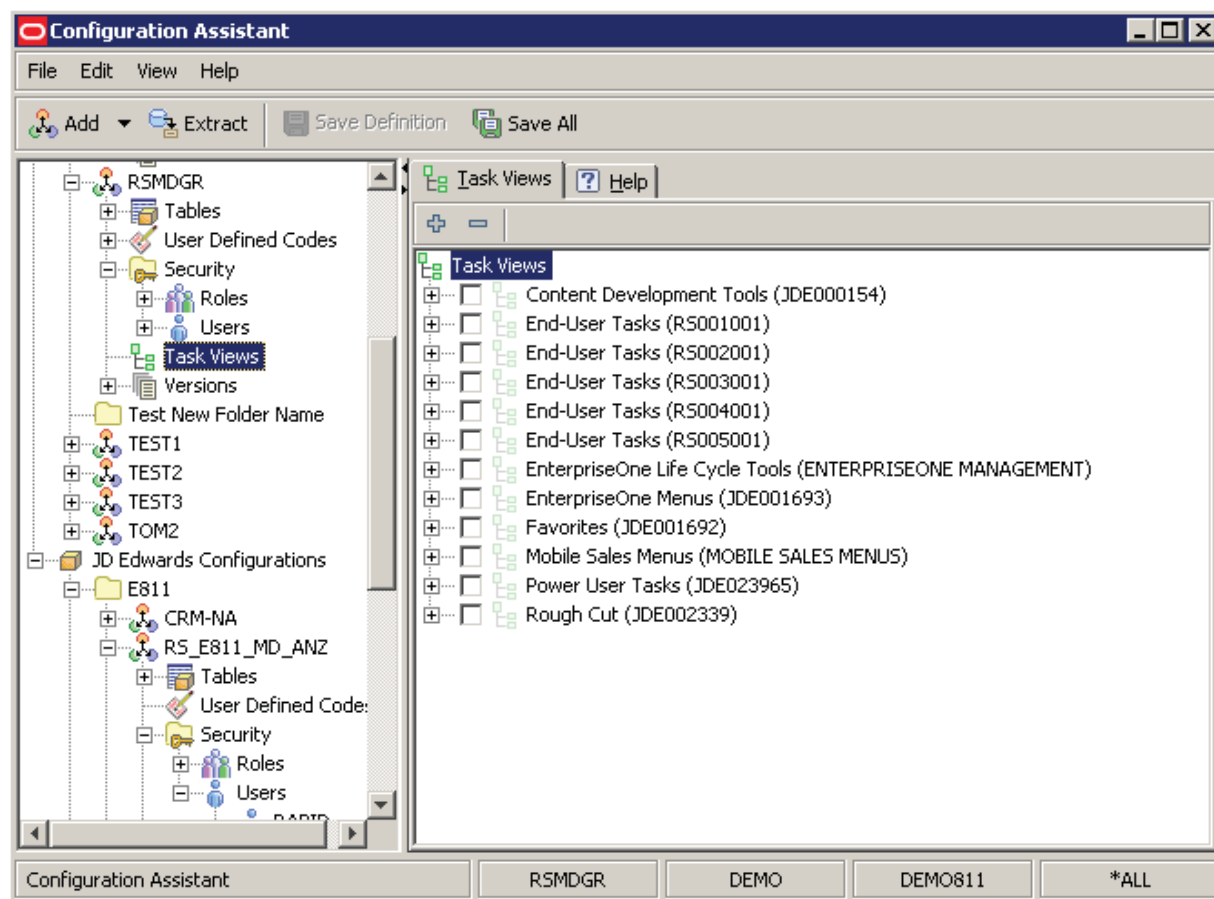


Tip

For searches, you can use the pulldowns to choose from predefined values for the Region and Industry fields. Refer to [Configuration Properties - Advanced Tab](#) for a description of the UDC values that are used by Configuration Assistant to populate these pulldown selections.

Task Views

When you select the Task Views tab, you are presented with a grid that displays all currently defined task views for the selected node:



Note

The selection of task views is only from the highest level within JD Edwards EnterpriseOne. That is, you cannot select only specific sections within a task view. You must either select the entire task view or not.

With the Task Views node selected, the Task Views tab presents a list of the Task View categories. If you expand a Task View category, Configuration Assistant retrieves and populates the display with all task views associated with the category. During the retrieval, Configuration Assistant displays a status indicating the progress of the record retrieval.



Note

For any selected objects, the non-changeable default load action is to Replace Objects.



Warning

This can be a time-consuming process, depending on the number of records that are retrieved. You cannot cancel the record load once you have initiated it. However, you can continue to use other functionality of Configuration Assistant while the load is in progress.

See Also. These topics in the Productivity Hints:

- [Adding or Removing Items to Your Configuration](#)
- [Edit Functions in Specific Nodes](#)
- [Folder Structure in the Configuration Assistant](#)
- [Icons Used by Configuration Assistant](#)
- [Multiple Selects and Deselects](#)
- [Panels in the Configuration Assistant](#)
- [Search Drop-Down List - Selecting All](#)
- [Search Results](#)
- [Search Strings - Valid Delimiters](#)
- [Search Strings - Wild Cards](#)
- [Sorting Within Columns in a Grid](#)
- [Status Bar](#)

Versions

When you click the Versions node, in the right panel you can select from these tabs:

- [Search](#)
- [All Versions](#)

See Also

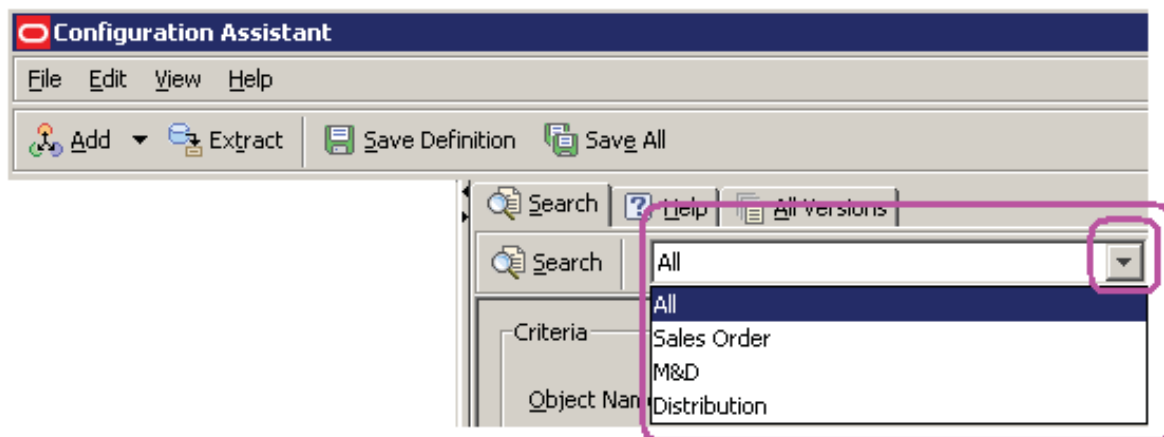
These topics in the Productivity Hints:

- [Adding or Removing Items to Your Configuration](#)
- [Edit Functions in Specific Nodes](#)
- [Folder Structure in the Configuration Assistant](#)
- [Icons Used by Configuration Assistant](#)
- [Multiple Selects and Deselects](#)
- [Panels in the Configuration Assistant](#)
- [Search Drop-Down List - Selecting All](#)
- [Search Results](#)
- [Search Strings - Valid Delimiters](#)
- [Search Strings - Wild Cards](#)
- [Sorting Within Columns in a Grid](#)
- [Status Bar](#)

Search

With the User Defined Codes node selected, the Search tab provides these functions:

- Search button
- Pulldown selections from predefined searches by industry or other category (for example, Rapid Start)



Note

If you select All from the Search pulldown, the Configuration Assistant pulls in all items which are defined for the selected node. This does not include transactional data.

- Search Criteria Fields
 - Code Type
 - Product Code
 - Type Description
 - Value
 - Value Description 01
 - Value Description 02



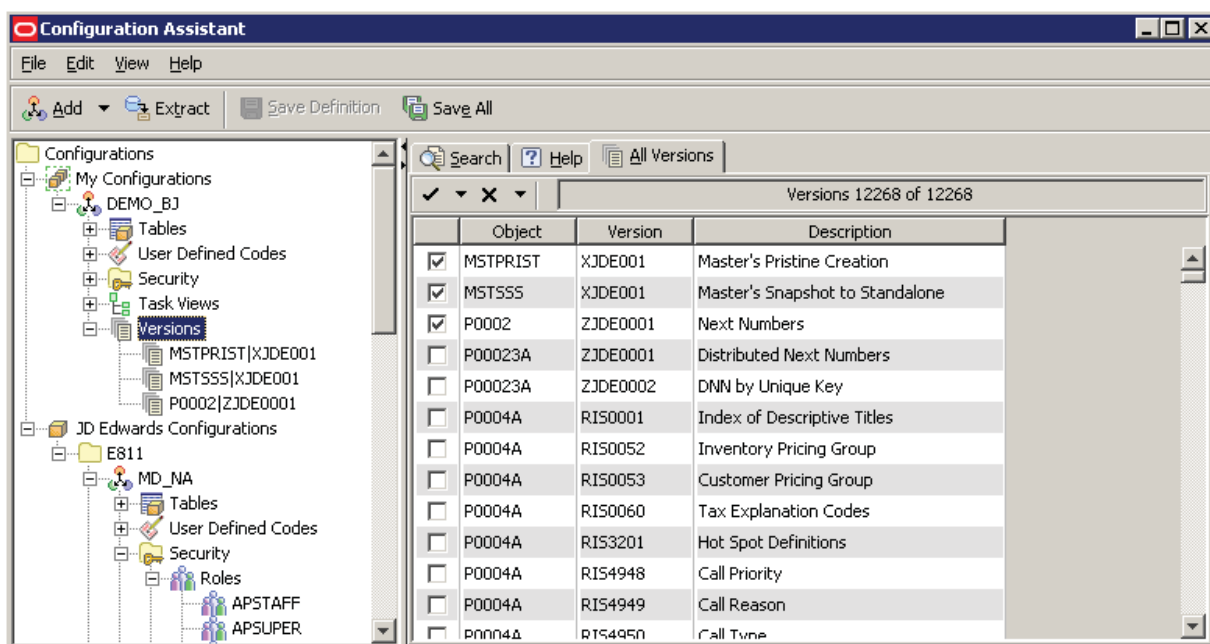
Note

For any selected objects, the non-changeable default load action is to Replace Objects.

All Versions

When you select the All Versions tab in the right panel, the Configuration Assistant displays a list of all JD Edwards EnterpriseOne Versions in the Version datasource for the environment in which you are logged on.

The grid contains a variety of information about each version, including object, version, and description.



Note

When you select All Versions, the Configuration Assistant displays all default JD Edwards versions (such as those prefixed with XJDE and ZJDE) as well as versions associated with Rapid Start (those that are prefixed with RIS).

