PeopleSoft®

EnterpriseOne Xe
Solution Accelerator Suite
Implementation PeopleBook

September 2000

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Table of Contents

Task Views

Activators

Solution Modeler

Solution Accelerator Suite

Solution Accelerator Suite

Solution Accelerator Suite is a collection of tools and technologies that extends J.D. Edwards OneWorld enterprise software and enables organizations to easily adapt their enterprise software after implementation to meet changing business conditions. Like OneWorld Explorer, Solution Accelerator Suite provides you with a convenient window into OneWorld. Solution Accelerator Suite redefines the enterprise resource planning world, however, in that it increases the power of each business to shape the ERP system to its needs.

The need for system flexibility is particularly acute for businesses competing in a rapidly changing, global economy. Businesses have a greater need to adapt. For example, businesses must be able to handle new forms of commerce, changing global office locations, new monetary standards, electronic commerce initiatives, and rapid changes in day-to-day processes.

A key problem for many businesses using enterprise software is that once they have taken their system "live," they find that making system modifications is a difficult task. Businesses need the ability to make technical and process changes to the software without lengthy downtimes that result in lost productivity. Sometimes, the ERP system's rigidity can create problems for businesses rather than creating the solutions to their day-to-day needs.

For example, a business professional might need to make a change in a process, such as setting up a warehouse. Rigidly constructed ERP systems require that an information technology expert rewrite code to permit this to happen, resulting in the loss of valuable time.

Solution Accelerator Suite, on the other hand, provides you with the ability to keep your system flexible so that it can evolve as your business grows and changes. You have the freedom to quickly transform your ideas into action to meet the short- and long-term opportunities that present themselves every day. The system is designed to be a flexible, customizable system that can adapt to your business needs and offer a permanent solution to the problem of adapting to changing conditions and requirements.

The Solution Accelerator Suite concept also rejects a "one-size-fits-all" approach to enterprise software in favor of the idea that many users will have many different needs.

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Key attributes that distinguish Solution Accelerator Suite from other ERP systems include:

- Ease of navigation. Solution Accelerator Suite offers a convenient, web-browser-based, customizable gateway to all features and to any internal or external web site. Using task views, you can create and use shortcuts to further speed your navigation and shorten your work time. Find It! allows you to quickly search for the programs that you need to do your work.
- Flexibility. Reusable units of work, called tasks, are at the core of the Solution Accelerator Suite. You use these tasks as building blocks to model and to create business and technical processes that can be modified without costly changes to the system.
- Configurability. You can set up the system so that it displays only the tasks and processes that you need for your daily work. You can enable and disable tasks and create variations on processes to reflect the needs of the system's users.
- Ease of use. Solution Accelerator Suite allows you to create special tasks, called activators, to build key business and technical processes without hard-coding form interconnections. Activators launch the Universal Director, which provides a graphical "wrapping" for the entire process you create and facilitates passing data between forms. The Universal Director also presents the steps included in a process in an easy-to-read format.
- Compatibility. The Solution Accelerator Suite architecture permits software developers and integration partners to produce custom activators that are compatible with both third-party software applications and with OneWorld.
- Accountability. Documentation exists for most tasks in Solution Accelerator Suite, which eliminates guesswork when you encounter a task. You can also create your own documentation for new tasks. Documentation means that information about tasks is readily accessible, even as people come and go within your organization.

Solution Accelerator Suite fulfills the promise of a system that allows you to quickly transform ideas that will better your business into actions that make those ideas reality. Not only does Solution Accelerator Suite provide your business with the power to build a highly customized, fully integrated enterprise solution; Solution Accelerator Suite also allows the system to be altered smoothly as business conditions warrant in a rapidly changing world.

This guide is composed of the following topics:

❑ Initial configuration

❑ Configuration refinement

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❑ Task view set up

❑ Task set up

❑ Activators

❑ Solution Modeler

How to Use This Guide

An important fact about Solution Accelerator Suite is that different users with different needs can use it in many different ways. An end user who is performing business tasks such as journal entry will be most concerned with finding easy access to the tasks necessary to complete the job. Such a user will access Solution Accelerator Suite through the Home Page and work most often in the Solution Explorer. This user will not be concerned with customizing the Solution Explorer.

Users who want to quickly acquaint themselves with Solution Explorer's interface and understand in general terms the meaning of the content in the various components of the interface can review the *Solution Explorer* section in the *OneWorld Foundations* guide.

System administrators will be most concerned with setting up and maintaining system security. These users will need to skim the various sections to acquaint themselves with the basic structure of Solution Accelerator Suite, and then review the *Security* section in the *OneWorld System Administration* guide

Solution Accelerator Suite Terminology at a Glance

This guide explains in detail the concepts behind Solution Accelerator Suite and the key tasks you complete to set up, maintain, and use the Solution Accelerator Suite. The following table briefly defines the most essential Solution Accelerator Suite terms.

Solution Explorer Term	Definition

Home Page	A URL whose contents first appear when the user launches the Solution Accelerator Suite. You can set the URL by configuring the jde.ini file as shown below. In this example, the home page is configured to display the ActivEra Portal.
	[EXPLORER]
	JASWebServer = “toolsjass1”
	JASPortalURL=“http://toolsjass1/jdeowportal”
	JASForceEnv=
	ExplorerHomeURL=“toolsjass1/jde/portal”
	ExplorerStart=home
	You can also configure the home page to display the last task the user viewed by setting ExplorerStart=task. To define a specific task view, set ExplorerStart=task:1234, where 1234 is the task view identifier.

Solution Explorer	A configurable Explorer for OneWorld and related objects that includes task content, when available.
Solution Modeler	An optional member of the Solution Accelerator Suite that allows you to model business processes and to relate business model tasks to Solution Explorer tasks.
Tasks	Units of work that you use to build essential business processes. Tasks can be interactive applications, batch applications, constants, next numbers, Windows executables, and so on.
Task relationships	Series of tasks arranged in parent-child relationships that form business processes such as Procure to Pay.
Task views	Collections of related task relationships, which appear in Solution Explorer.
Task links	Shortcuts from one relationship to another. The linked task appears in a secondary window in Solution Explorer.
Activators	Special tasks that you use to launch the Universal Director. Activators link logically together series of tasks; they allow business and technical professionals to make “on-the-fly” system changes and avoid costly down time.
Universal Director	A graphic user interface that the system launches when you access a task activator. The Universal Director provides a coherent framework for work with activators as well as the mechanism for passing data between the OneWorld forms required for completing the activator.

Solution Explorer Term	Definition
Rough Cut	The process you use to create a high level task view configuration. Using Rough Cut, you establish criteria the system uses to enable or disable tasks and task relationships. Rough Cut question tasks are categories of tasks; Rough Cut answers are the allowable values for each category.
Qualifier rules	Qualifier rules are if-then statements that you create, apply and use in conjunction with Rough Cut as the basis for enabling or disabling tasks. The system compares answers to Rough Cut questions to the criteria of the qualifier rules for each task and generates a batch process to enable or disable tasks based on the comparison.
Fine Cut	The process you use to selectively enable or disable tasks in a task view after you have created a task view configuration using Rough Cut.
Task relationship variants	A variation on a task relationship that you create using Fine Cut. In creating the variant you selectively disable tasks in the relationship, then save the variant. The system stores the variant, which you can activate as an alternative to the default task relationship.

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Task Views

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Initial Configuration

After installing OneWorld, launch the Solution Explorer, and then access the Getting Started task view. This task view orients you to the Solution Explorer. Your next step is to access the Implementation Approach task view. This task view provides a detailed implementation strategy that guides you through the OneWorld configuration and implementation process. The Implementation Approach task view represents information gathered from numerous implementation experts. When using these task views, make sure the Documentation window is visible. Documentation on how to use these task views appear in the Documentation window when you launch each task view.

Note: The Application Set Up task view is closely related to the Implementation Approach task view. You will probably never work with the Application Set Up task view on its own; it contains numerous link targets from the Implementation Approach task view that can simplify the implementation software tasks you need to perform.

While implementing OneWorld, one of the first steps in setting up the Solution Explorer is defining your business within the system to help determine which OneWorld tasks will be available to your users. To do this, you use a utility called Rough Cut. Rough Cut contains a list of descriptors that can be applied to business systems. Choosing some values and not others helps you to configure Solution Explorer so that it will display only those tasks that users need to do their work.

For example, your system might be built purely around automotives. Consequently, you would select only *Automotive* from the Rough Cut category *Industry.* By doing so, you provide the system with information so that it can disable certain tasks that your automotive business would not use, such as pharmaceutical tracking processes.

The results generated by Rough Cut (enabling and disabling tasks) are reflected in all of the Solution Explorer task views. After using Rough Cut, you use another utility, Fine Cut, to refine the configuration. As your business changes over time, you will continue to use Fine Cut to enable and disable applicable tasks.

Rough Cut consists of lists of categories (also known as questions), arranged in a hierarchical menu structure. Each category contains multiple values.

Initial configuration consists of the following tasks:

- ❑ Performing the initial configuration

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Performing the Initial Configuration

You perform the initial configuration for your system using Rough Cut. Rough Cut displays information categories that broadly define a business system. You select which categories are applicable to your business system. Based on how you define your system in Rough Cut, the system enables certain tasks and disables others. Then you use Fine Cut to override the system's suggestions where necessary.

Defining your business system in OneWorld need not occur within a single session. You can save your work at any time and return to Rough Cut later to continue, if necessary. The system stores your selections in the Environment Answer table (F9010).

See Also

- *Refining the Configuration* for information on using Fine Cut to refine Rough Cut results

▶ To perform the initial configuration

1. In the Solution Explorer, choose Rough Cut from the Tools menu.

   The Rough Cut task view appears.

2. Expand a Rough Cut category, such as Geography, and click the categories that apply to your business system.

   Many categories have subcategories. Parent categories can be symbolized with a book icon or with a checkbox. Clicking a parent-level checkbox selects all of its children.

3. Continue through all of the categories, checking those items that are applicable to your system and leaving blank those that are not.
4. Click the Save Data button on the Toolbar.

   You can save your work at any time. However, you must save before performing the next step.

5. Click the Idea to Action button on the Toolbar.

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The system analyzes all of the tasks in the system and enables or disables them based on your input. This process might take a few minutes.

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Configuration Refinement

One of the initial configuration tasks for the Solution Explorer is to use Rough Cut to define your business system. Based on your choices, Rough Cut processes all of the OneWorld tasks and disables several. To refine the initial configuration you use the utility called Fine Cut. After refinement, all of the tasks are appropriately enabled or disabled.

After your initial configuration, as your business changes over time, you can continue to use Fine Cut to enable and disable tasks as appropriate.

In Fine Cut, you selectively enable and disable tasks by choosing them and clicking buttons on the Toolbar. Then, when you execute Fine Cut, the system changes the properties of the affected tasks, which are stored in the Task Master table (F9000).

You can choose to hide or show tasks that you have disabled using Fine Cut by turning on or off the Show/Hide Disabled Tasks button on the Toolbar. The system enables this button after you turn Fine Cut off. Turning off the Show/Hide Disabled Tasks button hides disabled tasks from the task view and simplifies navigation.

However, you might choose to show disabled tasks if you want to keep track of all the tasks in a particular task view and their relationships, particularly if you plan on using Fine Cut frequently. If you click the Show/Hide Disabled Tasks button, the system displays the disabled tasks with a red X.

Hiding and showing disabled tasks affects how you see your task views only. If you choose to show disabled tasks, other users will not see the disabled tasks in their task views.

Configuration refinement consists of the following tasks:

- ❑ Refining the configuration

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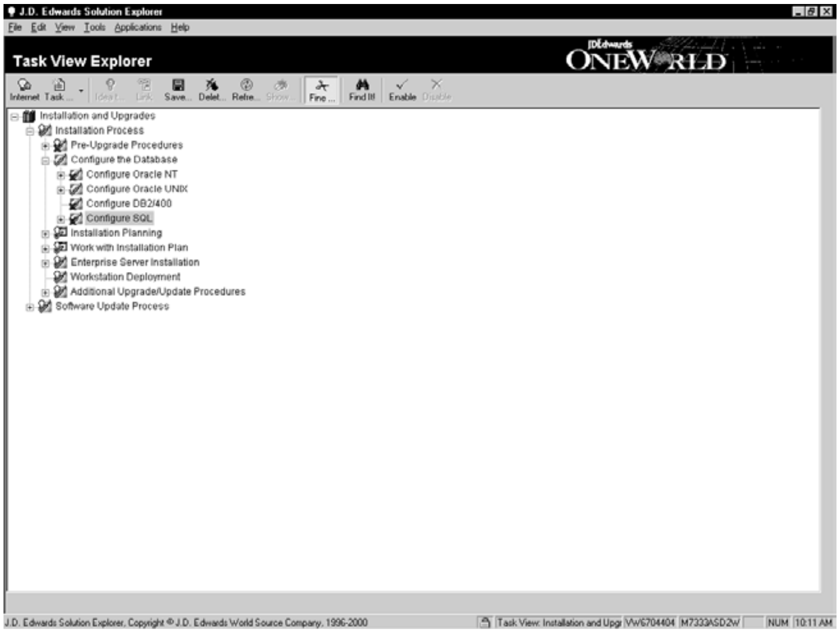
Refining the Configuration

You use Fine Cut to selectively enable or disable specific tasks in your implementation of the OneWorld system.

▶ To refine the configuration

1. In the task view of Solution Explorer that you want to refine, click the Fine Cut button on the Toolbar.

   The system changes the task view menu to indicate enabled and disabled tasks. Enabled tasks are indicated by a green checkmark; disabled tasks are indicated by a red X.



2. Expand the task tree in the task view to find a task that you want to enable or disable.
3. Select a task.
4. Click either the Enable or Disable button on the Toolbar.

   You can also double-click the task to toggle between the enabled and disabled conditions.

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5. Repeat steps 2–4 for each task you want to enable or disable.
6. When you have finished refining the task list, click the Save Data button.

   If you fail to save the changes, the system cannot store the new parameters, and your changes will not remain if you exit the Solution Explorer and then launch it again later.

7. Click the Fine Cut button to exit Fine Cut mode.
8. Click the Show/Hide Disabled Tasks button to toggle between hiding and displaying disabled tasks in the current task view menu.

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Task View Set Up

Tasks are the most discrete units in the Solution Explorer. Tasks are organized into hierarchical tree structures inside of task views. J.D. Edwards provides thousands of tasks and you can add more of your own. When placed in a single task view, finding a specific task among thousands might be difficult and time-consuming.

Instead of having only one task view in which all of the tasks in the system appear, the Solution Explorer allows you to have many different task views, each displaying only some of the tasks in the system.

Typically, tasks are grouped in a task view because they relate to a common business system, process, or function. Logical selection and grouping of tasks in this way can make it easier for users to find the functions they need. You can further refine which tasks a user sees in a task view by designating a task view to be role based. Role based task views allow users to apply a role filter to the view that will display only those tasks associated with the role that the user applied. Users can only apply roles for which they have been granted access.

Additionally, you can prevent users who only have View access to the Solution Explorer from seeing task views you set as being secured.

Task view set up consists of the following tasks:

- ❑ Working with task views
- ❑ Working with task view variants

See Also

- *Working with Task View Variants* for information about creating and modifying task menu variants
- *Task Set Up* for information about creating, working with, and documenting tasks
- *Working with Task Links* for information about creating links between tasks to aid navigation through task views

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Working with Task Views

Task views are groups of tasks arranged in a hierarchical tree structure. Working with task views consists of the following tasks:

- ❏ Creating a new task view
- ❏ Changing a task view
- ❏ Deleting a task view

Creating a New Task View

Create a new task view if you want a new category of tasks to which you want to insert tasks and build task relationships.

See Also

- *Creating a Task* and *Working with Tasks* for information on populating a task view with tasks

▶ To create a new task view

1. On Solution Explorer, choose Add a New Task View from the Tools menu.
2. On Task View Revisions, complete the following fields, and then click OK:
   - Task View

     Enter an internal ID for the Task View. The ID must be between two and five numbers long and cannot contain alpha characters. If you start the ID with more than one zero, the system will truncate it to a single zero. For example, if you input 005 as an ID, the system will change the number to 05.

   - Name
   - Description

     The name and the description do not have to be the same.

   - Secured Task View

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- Role Based Task View

  If you want users to be able to filter tasks in the task view based on their roles, select this option.

Field	Explanation
Secured Task View	Marking a Task View as being secured may hide that Task View for a user depending on that user's security settings. If the Task View is marked and the user only has View security for Explorer then the user will not be able to see the Task View. If the Task View is marked and the user has Add or Change security for Explorer then the user will be able to see the Task View.

Changing a Task View

You can modify an existing task view. For example, you might want to change the name of a task view so that it more accurately reflects the category of tasks in that view.

See Also

- *Working with Task Views* for information about copying or moving task view menu nodes
- *Working with Task View Variants* for information about providing alternate views of task view menus and nodes
- *Working with Tasks* for information about copying, moving, and deleting tasks

▶ To change a task view

1. On Solution Explorer, choose Work With Tasks from the Tools menu.

   Alternately, right-click in the task view and choose Task Revisions from the menu.

2. On Work with Tasks, choose Task Views from the Form menu.
3. On Work with Task Views, click Find.

   Use the QBE row to refine your search.

4. Choose the task view you want to change, and then click Select.
5. On Task View Revisions, change any of the following fields, and then click OK:

- Name
- Description

  The name and the description do not have to be the same.

- Secured Task View
- Role Based Task View

  If you want users to be able to filter tasks in the task view based on their roles, select this option.

Field	Explanation
Secured Task View	Marking a Task View as being secured may hide that Task View for a user depending on that user's security settings. If the Task View is marked and the user only has View security for Explorer then the user will not be able to see the Task View. If the Task View is marked and the user has Add or Change security for Explorer then the user will be able to see the Task View.

Deleting a Task View

You can delete any task view from the system. Deleting a task view does not delete the tasks within the view from the system, however.

See Also

- *Creating a New Task View* for information on securing task views from users who only have View access to the Solution Explorer
- *Deleting a Task* for information on removing tasks from the system

▶ To delete a task view

1. On Solution Explorer, choose Work With Tasks from the Tools menu.
2. On Work with Tasks, choose Task Views from the Form menu.
3. On Work with Task Views, click Find.

   Use the QBE row to refine your search.

4. Choose a task view, and then click Delete.

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Working with Task View Variants

You might want to customize certain task views or parts of task views for specific user groups. The system allows you to do so with variants. A variant is a subset of the tasks in the original task view. Variants allow you to customize and simplify task views. You can create a variant of the entire task view by making a variant of the task view node (the first node at the top of the task view menu), or you can create a variant of any of the parent tasks in the task view.

You can use variants to make different versions of task objects available to users, and you can vary the the descriptions of the tasks as well. Furthermore, when linking to a node that has one or more available variants, you can choose to link to the base view or to any of the variants instead. The variant does not replace the original task view menu; it is an alternate view which the user must apply and clear manually or that you can cause to be displayed as the target of a link. Note that if you create a variant of a specific node in the task view, the user must know which node to select to be able to apply the variant.

Working with task view menu variants consists of the following tasks:

❑ Creating a variant

❑ Changing a variant

❑ Deleting a variant

See Also

- *Working with Task Links* for information about linking tasks to help users move quickly from one task to another without searching for it
- *Working with Variant Task Views* in the *OneWorld Foundation* guide for information about applying and clearing task view menu variants

Creating a Variant

To create a variant, you refine the task view using Fine Cut, then save the variant. You create the variant based on your needs analysis of the variant users.

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▶ To create a variant

1. In a task view of Solution Explorer, click the Fine Cut button on the Toolbar.
2. Select a parent task and expand the task tree to expose tasks that you want to disable.
3. Select each task that you want to disable, and then click the Disable button.
4. After you have disabled all the tasks that you do not want to appear in the variant, select the parent task.
5. Right-click and choose Save Variant from the menu.
6. On Create New Variant, enter a name for the variant, and then click OK.

   The system saves your variant to the Variant Description (F9005) and the Variant Detail (F9006) tables. This operation might take a few minutes.

Changing a Variant

The ability to modify variants allows you an extra measure of control over the configuration of your Solution Explorer task view. Overriding the default task name and task version, for example, further differentiates a variant from the default version. Changing the name and version for the variant makes it easier for you and other users to understand the difference between the variant and the default view. You might want to work with a different application version than the default when you are in a variant view, and you can set that version with an override. After you have set the override, you do not have to change the version for the task in the variant again, unless you decide that you want to.

Keep in mind that the changes you make to the variant, such as assigning new task names, apply only to the variant. The system preserves the properties that define the default view. You are not replacing the original view; you are creating an alternative to be used in specific situations required by your business.

▶ To change a variant

1. In a task view of Solution Explorer, click the Fine Cut button on the Toolbar.
2. Select the parent task of the task relationship that has a variant.
3. Right-click the parent task, and then choose Manage Variants from the menu.
4. On Variant Name Search & Select, choose the variant you want to change, and then click Select.

Use the QBE row and click Find to search for a variant. When you bring up this form, the system shows all of the variants for all of the nodes under the parent task you clicked on.

The Variant Definition form appears, displaying all of the child tasks under the current node.

Alternately, you can access the Variant Definition form from the Content Management task view. Launch the Work with Variants task, and then find and select the variant you want to change.

5. Change the columns in the rows as desired, and then click OK:
   - Active
   - Override Task
   - Override Task Versoin
6. Close the Variant Search and Select form.
7. Click the Fine Cut button to exit Fine Cut Mode.

Field	**Explanation**
Active	Designates whether a task is active within a variant.
Override Task	Gives the user the ability to override the task name when it is used as a member in a variant.
Override Task Version	Override Task Version allows the user to override the version called when used as a member in a variant.

Deleting a Variant

You must use the Work with Variants application to delete a variant.

▶ To delete a variant

1. From the Content Development task view, launch the Work with Variants task.
2. On Work with Variants, click Find.

   Use the QBE row to refine your search.
3. Choose the variant you want to delete, and then click Delete.

   The system verifies the deletion.

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Task Set Up

To design and manage your system, you work with tasks—units of work that you use to build essential business processes. Tasks can be interactive applications, batch applications, constants, next numbers, Windows executables, and so on. You work with tasks in a Solution Explorer task view, which is a collection of related tasks hierarchically grouped in parent-child relationships, illustrated graphically by the task view menu. These task groups usually represent the steps in an essential business processes such as Procure to Pay.

J.D. Edwards provides a large selection of tasks which are already grouped in relationships within different task views. You can build on this base by modifying already existing tasks and their relationships. You can also create new tasks, task relationships, and views.

Within a task view, you insert new or existing tasks and arrange the tasks in logical sequences. You create or revise tasks on an ongoing basis, and then insert them to a task view as you deem necessary to build and enhance your business processes. The processes are fluid: you can drag and drop tasks and task relationships to change the relationships and the order that you perform tasks.

The system stores each task in a task view in the Task Master table (F9000) and assigns a unique ID to each one. Each task is a reusable object that you can insert into an existing task relationship, or you can use as a basis for creating a new task relationship. After you have inserted a task in a task view, you can move it, revise it, write documentation for it, set up processing options, set up versions, and locate it. You can accomplish any of these functions in a Solution Explorer task view, by launching interactive applications or using features and functions encompassed within Solution Explorer.

Task set up discusses the following topics:

- ❑ Understanding task types
- ❑ Creating a task
- ❑ Working with tasks
- ❑ Working with task links
- ❑ Documenting tasks

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See Also

- *Task View Set Up* for information about creating and maintaining task views
- *Working with Task View Variants* for information about creating and modifying task view variants
- *Working with Task Links* for information about creating links between tasks to aid navigation through task views

Understanding Task Types

When you create a task, you will be able to classify it in one of several ways. Each type of task is represented in the task view menu with its own icon. The Solution Explorer task types are:

- Interactive
- Batch
- Windows
- Non-software
- Activity script
- User defined code
- Processing option
- AAI
- Constant
- Next number

Interactive

Use this category for interactive OneWorld applications (with the exceptions of AAI and Constant applications). When the user runs this task, the application launches. You can define which version and even which form you want the task to launch, if desired. You can also control whether the user is prompted for processing options and in what mode (default, add, update, delete) the form will open. This last parameter is typically used only when the task will be used in a Universal Director process.

Batch

Use this category for batch OneWorld applications (such as reports). When the user runs this task, the batch application is submitted for processing. You can define which version you want the task to launch. You can also control how the user is prompted to set processing options and data selection.

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Windows

Use this category for Windows executable files. When the user executes this task, the system calls the Windows program. To use this option, you define the executable, its working directory, and the command-line parameters you want to pass to the program.

Non-Software

Use this category to create graphic placeholders in a task view. For example, you might want to group a number of procure to pay batch applications within the tree structure. You could create a non-software task called Procure to Pay Batch to act as the parent task and then place all of the batch-related tasks under it.

Activity Script

Use this category to define HTML-editable documents that are attached to Solution Modeler tasks.

User Defined Code

Define a task as a User Defined Code to access the Work with User Defined Codes form. The parameters you define for this task type (product code and UDC) are passed to the form so the user can work with the UDC set you specify.

Processing Option

Define a task as a processing option to bring up the processing options for the application you specify. You can also define the application version and the mode that the form appears in.

AAI

Use this category for interactive OneWorld applications affecting automatic accounting instructions. This type of task is identical to the Interactive task type except that its icon in the task view menu is different from the Interactive task type icon.

Constant

Use this category for interactive OneWorld applications affecting the constant values for a system. This type of task is identical to the Interactive task type except that its icon in the task view menu is different from the Interactive task type icon.

Next Number

Use this category to create a task that brings up the Set Up Next Numbers by System form when you execute it. This task type requires the product code of the system you want to affect.

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Creating a Task

The tasks in task views are reusable objects, which add to the flexibility of the Solution Explorer. Tasks reside in the Task Master table (F9000).

You can create a new task directly in the Solution Explorer by inserting a new task in a task view menu. You define the task with the Task Revisions form. When you create a task, you automatically create a relationship between the new child task and the parent task under which you inserted the new task.

Before You Begin

❑ If you are creating a task to launch an object such as an application, the object must already exist in the system before you can create a task for it. For example, you might want to design a new report and then make it available for processing via a task in a task view. Before you create a task that launches a report, you must first design and check in the report.

▶ To create a task

1. In a task view, select the task that will be the parent of the task that you want to create.
2. Right-click the task and choose Insert New Task from the menu.
3. On Task Revisions, complete the following field.
   - Task Name
4. Click the Common tab, and then complete the following fields:
   - Product Code
   - Activator Type

     Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.
   - Client Platform

     Leave this field blank if the task you are creating runs on both Windows and Web clients. Otherwise, enter W to specify web client only, or C to specify windows client only.
   - Country Code

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Leave this field blank if you want this task available for all users regardless of their country code. Otherwise, enter the country code users need assigned to access this task.

- Required

  Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.

- Active

  Deactivating a task makes it unavailable to users in any task view. Generally, you will want to keep your new tasks active.

5. Click the Executable tab, and then choose a task type option.

   Note: Many of the task type options require that you enter additional information. For example, if you choose Interactive as a task type, you must supply the object name for the application, the version, and form names, and set up processing options, if any.

   - Interactive

     Select this option for a task that will launch an interactive OneWorld application.

     - Application

       Enter the application's object name. Click the Search button to search for an application.

     - Version

       This is an optional field. To launch a specific version of an application, enter the version. Click the Search button to search for a version.

     - Form

       This is an optional field. To open a specific form in the application, enter the form ID. Click the Search button to search for a form.

     - Option Code
     - Form Mode

       Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.

- Batch

  Select this option for a task that will launch a OneWorld batch application.

  - Application

    Enter the batch application's object name. Click the Search button to search for an application.

  - Version

    This is an optional field. To launch a specific version of a batch application, enter the version. Click the Search button to search for a version.

  - No Processing Options

    Select this option to execute the batch application without processing options.

  - Blind Execution

    Select this option to execute the batch application without displaying its processing options.

  - Prompt for Version

    Select this option if you want to prompt the user to select which version of the batch application to run at execution.

  - Prompt for Values

    Select this option if you want to prompt the user to enter processing option values at execution.

  - Data Selection

    Select this option if you want to prompt the user to enter data selection at execution.

  - Data Selection and Values

    Select this option if you want to prompt the user to enter data selection and processing option values at execution.

- Windows

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Select this option for a task that will launch a Windows-based executable.

- Windows Executable

  Enter the executable name.

- Working Directory

  This is an optional field. Enter the directory where the executable resides.

- Executable Parameters

  This is an optional field. Enter any input commands, functions, or parameters you want to pass to the executable when it launches. Not all Windows executables accept parameters at launch.

- Non-Software

  Select this option for a task to be used as a placeholder in a task view. This task will not execute a function, but will be used to organize tasks in the tree.

- Activity Script

  Select this option for a task to be used as HTML text to be attached to a modeler task.

- User Defined Code

  Select this option for a task that will launch the UDC application to allow a user to modify UDCs.

  - Product Code
  - User Defined Codes

- Processing Option

  Select this option for a task that will display processing options for an application.

  - Application

    Enter the application's object name. Click the Search button to search for an application.

  - Version

    This is an optional field. To launch a specific version of an application, enter the version. Click the Search button to search for a version.

  - Option ID

- AAI

  Select this option for a task that will launch an automatic accounting instruction application.

  - Application

    Enter the application's object name. Click the Search button to search for an application.

  - Version

    This is an optional field. To launch a specific version of an application, enter the version. Click the Search button to search for a version.

  - Form

    This is an optional field. To open a specific form in the application, enter the form ID. Click the Search button to search for a form.

  - Option Code
  - Form Mode

    Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.

- Constant

  Select this option for a task that will launch an application to allow the user to modify constants.

  - Application

    Enter the application's object name. Click the Search button to search for an application.

  - Version

    This is an optional field. To launch a specific version of an application, enter the version. Click the Search button to search for a version.

  - Form

    This is an optional field. To open a specific form in the application, enter the form ID. Click the Search button to search for a form.

  - Option Code
  - Form Mode

    Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Activators* for more information.

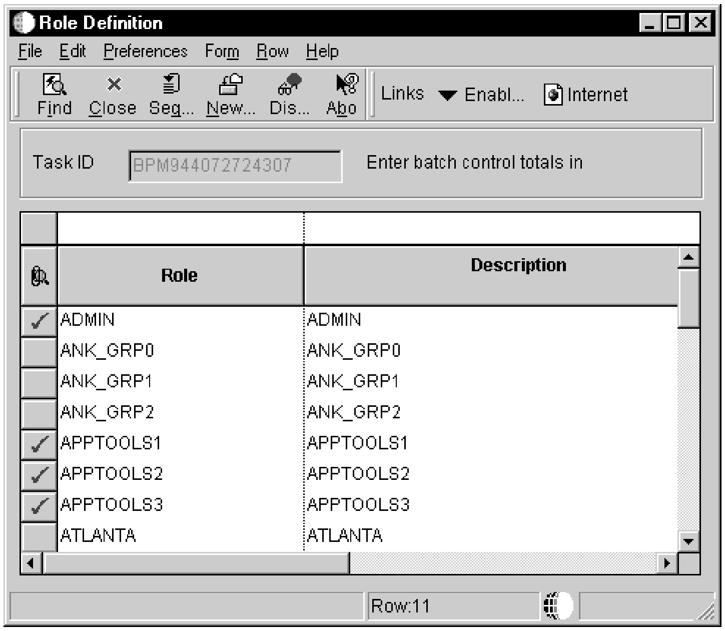
- Next Number

  Use Next Number to launch the Set Up Next Numbers by System form.

  - Product Code

6. Click the Resources tab, and then complete the following fields:
   - Base Resource
   - Base Units
   - Unit of Measure
7. To apply roles to the task, choose Roles from the Form menu.
8. On Role Definition, choose the a role that you want to apply to the task, and then choose Change Status from the Row menu.

   A checkmark appears to indicate the role is applied to the task. To remove a checkmark, choose Change Status from the Row menu again. To apply all roles to the task, choose Enable All from the Form menu.



Task ID BPM944072724307 Enter batch control totals in

	Role	Description
✓	ADMIN	ADMIN
	ANK_GRP0	ANK_GRP0
	ANK_GRP1	ANK_GRP1
	ANK_GRP2	ANK_GRP2
✓	APPTOOLS1	APPTOOLS1
✓	APPTOOLS2	APPTOOLS2
✓	APPTOOLS3	APPTOOLS3
	ATLANTA	ATLANTA

Row:11

9. Click Close.
10. On Task Revisions, click OK.

Field	Explanation
Task Name	Descriptive name for a Task ID.
Activator Type	Activator Type classifies a task. You can classify an activator as a business activator or technical activator, or not an activator. Business activators allow you to make quick changes to the processes you follow to manage your operation on a day-to-day basis. For example, a business activator might allow you to make changes or additions to your benefits structure. Technical activators allow you to manage and fine-tune your system infrastructure by adding new users, setting up security, changing workflow, and so on.
Required	Marking a task as being required ensures that it will run when it is used in a Task Relationship.
Active	If a task is marked as “not active,” it will not be shown in any business process flows. A task may become inactive based on the answers to the interview questions or through the configure process.
Version	Identifies a specific set of data selection and sequencing settings for the application. Versions may be named using any combination of alpha and numeric characters. Versions that begin with ‘XJDE’ or ‘ZJDE’ are set up by J.D. Edwards.

Field	Explanation
Form	The unique name assigned to a form.
Option Code	For World, this code specifies the function of a menu selection using the DREAM Writer when F18 is pressed. F18 may be locked out by simply replacing code 1 with 3 or code 2 with 4. This code, in conjunction with the version number and the option key, provide the following functions: Code 1 version — mandatory; option key — form i.d. F18 displays processing options. Selection = blind DREAM Writer execution. 2 version — blank; option key — form i.d. F18 displays DREAM Writer versions list. Selection = DREAM Writer versions list. 2 version — not blank; option key — form i.d. F18 displays DREAM Writer versions list. Selection = blind execution, batch. Review the HELP instructions for Menu Information (Menu Locks) (P0090) for a detailed explanation of codes related to job submission and control. For OneWorld, this code specifies whether the user will be prompted for additional information prior to running the application. Available values are: 0 No processing options 1 Blind execution (no prompt) 2 Prompt for version 3 Prompt for values
Form Mode	Form mode is to be used with Tasks that are of type Interactive. A form mode can specify how a form is called from the Universal Director. Calling a form in different modes causes the form to react differently to actions on the form.
Product Code	A user defined code (98/SY) that identifies a J.D. Edwards system.
Option ID	Processing Option ID
Base Resource	The individual who is responsible for performing the task.
Base Units	The estimated amount of time it will take to complete a task
Unit of Measure	Indicates the unit of measure that the estimated units is entered in.

Working with Tasks

The tasks in task views are reusable objects, which adds to the flexibility of the Solution Explorer. Not only can you create tasks and insert them into the appropriate task view; you can build tasks into task relationships that represent key business processes. You can also move tasks freely within a task view by dragging and dropping them into the appropriate task relationship. You can revise task properties, set processing options and interactive versions, and reuse the same task in as many different task relationships as necessary.

Tasks reside in the Task Master table (F9000).

Working with tasks discusses the following steps you complete to modify tasks:

- □ Inserting an existing task
- □ Setting default processing options for a task
- □ Setting versions for a task
- □ Applying roles to a task
- □ Changing a task
- □ Deleting a task

Inserting an Existing Task

When you insert a task and thereby create a task relationship, the system stores the parent-child relationship that you create in the Task Relationships table (F9001). The system also stores the task view into which you inserted the task.

Because tasks are reusable objects, you can insert the same task into multiple task view menus.

▶ To insert an existing task

1. In a task view of Solution Explorer, select a task that will be the parent of the task that you want to insert.
2. Right-click the parent task, and then choose Insert Existing Task from the menu.

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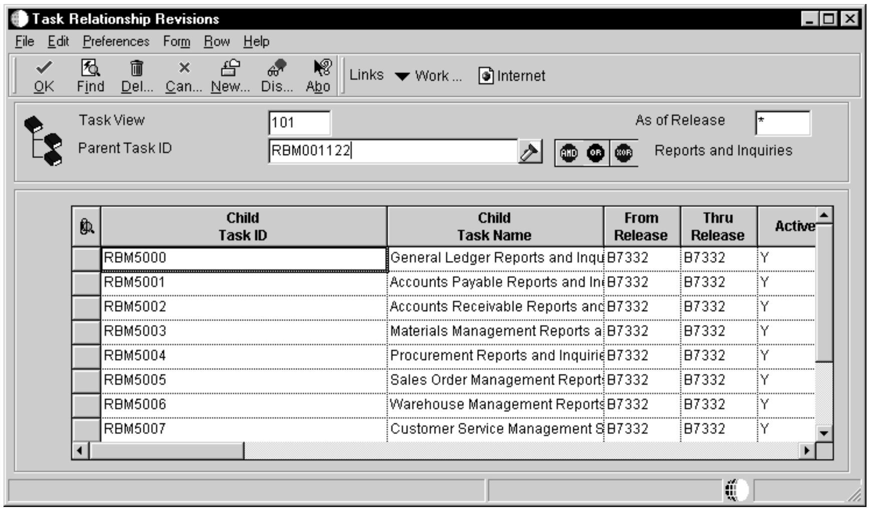
The Task Relationship Revisions form appears. The form displays the parent task ID and all tasks that are children of the parent task you selected.



Task Relationship Revisions
File Edit Preferences Form Row Help
OK Find Del... Can... New... Dis... Abo
Links Work ... Internet
AND OR XOR

Task View 101

Parent Task ID RBM001122

As of Release *

Reports and Inquiries

Child Task ID	Child Task Name	From Release	Thru Release	Active
RBM5000	General Ledger Reports and Inqu	B7332	B7332	Y
RBM5001	Accounts Payable Reports and In	B7332	B7332	Y
RBM5002	Accounts Receivable Reports and	B7332	B7332	Y
RBM5003	Materials Management Reports a	B7332	B7332	Y
RBM5004	Procurement Reports and Inquirie	B7332	B7332	Y
RBM5005	Sales Order Management Report	B7332	B7332	Y
RBM5006	Warehouse Management Reports	B7332	B7332	Y
RBM5007	Customer Service Management S	B7332	B7332	Y

3. Click a new line, and complete the following required fields:

   - Child Task ID

     Use the Search button to access the Task Search & Select form where you can find the task you want to insert.

   - Presentation Sequence

     If you want the task that you are inserting to appear in a position other than last in the presentation sequence, be sure to change the presentation sequence of the other tasks. For example, if the task you are inserting is in the eighth position, but you want it to appear second, you will have to change the presentation sequence of the task that is currently second to third, the third to fourth, and so on.

4. Complete any of the following fields:

   - Active
   - Required

     Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Linking Tasks To Create a Process* for more information.

   - Task View
   - Activator Type

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Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Linking Tasks To Create a Process* for more information.

- Override Resource
- Override Units
- Unit of Measure
- Auto Data Passing

  Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Linking Tasks To Create a Process* for more information.

- Override Form Mode

  Leave this field blank unless you plan on using this task as part of a Universal Director process. See *Linking Tasks To Create a Process* for more information.

5. Click OK.

Field	**Explanation**
Presentation Sequence	This field signifies the order in which the child tasks should appear.
Active	If a task in a task relationship is marked as “not active,” it will not be shown in any business process flows. A task may become inactive based on the answers to the interview questions or through the configure process.
Required	Marking a task as being required ensures that it will run when it is used in a Task Relationship.
Task View	Tasks can exist in different views for different reasons. They may be in the same view to make up a Procedural flow of events or to make up a Functional flow of events. You can create custom task views if necessary.
Activator Type	Activator Type classifies a task. You can classify an activator as a business activator or technical activator, or not an activator. Business activators allow you to make quick changes to the processes you follow to manage your operation on a day-to-day basis. For example, a business activator might allow you to make changes or additions to your benefits structure. Technical activators allow you to manage and fine-tune your system infrastructure by adding new users, setting up security, changing workflow, and so on.

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Field	Explanation
Override Resource	The resource that will complete the task can be overridden when that task is used in a Task Relationship.
Override Units	The estimated units that it will take to complete a task can be overridden within the relationship if it is felt that the time to complete the task will be different in context of the process flow.
Unit of Measure	Indicates the unit of measure that the estimated units is entered in.
Auto Data Passing	This flag is defined at the relationship level and specifies if data is automatically passed to other tasks in the relationship.
Override Form Mode	Form mode override is to be used with Tasks Relationships that are interactive. A form mode override can specify how a form is called from the Universal Director. Calling a form in different modes causes the form to react differently to actions on the form. The form mode override will override the form mode specified at the task level.

Setting Default Processing Options for a Task

You can set processing options, if they exist, for an interactive, AAI, constant, or batch application task. Even thought you input the values, the user will still have an opportunity to change the values when he or she launches the task.

▶ To set processing options for a task

1. In a task view of Solution Explorer, select an interactive, AAI, constant, or batch application task.
2. Right-click the task, choose Prompt for, and then choose Values from the menu.

   The system launches the processing options form for the task. Note that if processing options for the application do not exist, the Prompt for Values option is disabled.

3. Enter processing options for the task, and then click OK.

Setting Versions for a Task

You can choose which version of an object a task will launch.

▶ To set versions for a task

1. In a task view of Solution Explorer, select an interactive, AAI, constant, or batch application task.
2. Right-click the task, and then choose Prompt for Versions from the menu.

   The OneWorld Work With Versions form or Work With Batch Versions form appears.

3. Set up the interactive or batch version, and then click OK.

Applying Roles to a Task

You apply roles to tasks so that the tasks will be filtered properly in role-based task views. You can apply one or more roles to each task.

When a user launches a role-based task view, the system applies his or her default role to the view. If the system administrator has applied other roles to that user, he or she can apply them to the task view to see a different set of tasks.

For example, a user might have two roles: General Accounting Clerk (the user's default role) and Accounts Payable Clerk. When the user launches a role-based task view, the system displays only those tasks to which the General Account Clerk role has been applied, such as Auto-reconcile Void Payments, Auto-reconcile Void Receipts, and Refresh Reconciliations File. The user can apply the Accounts Payable Clerk role to the task view, and the system displays only those tasks to which the Accounts Payable Clerk role has been applied, such as Speed Status Change, Create Payment Groups, and Work with Payments.

See Also

❑ *Creating a Task* for information about applying roles to a new task when you create it

❑ *Creating a New Task View* for information about creating a role-based task view

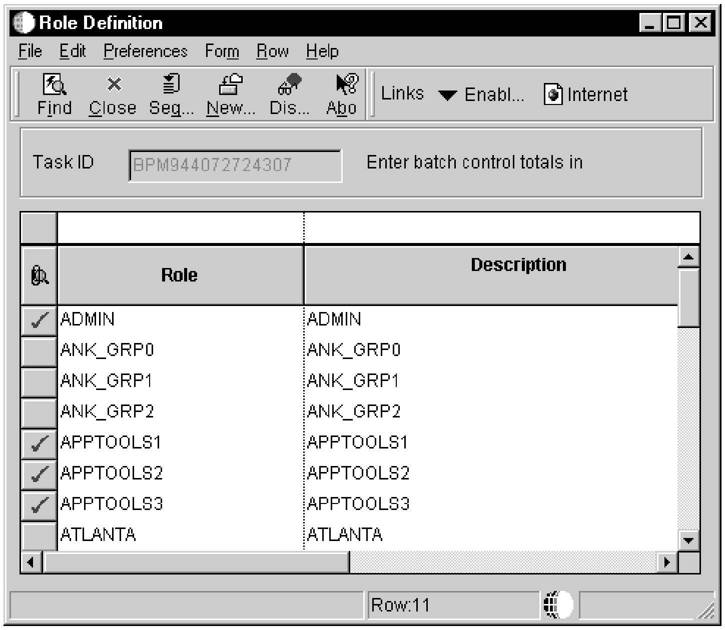
❑ *Setting Up User Roles* in the *OneWorld System Administration* guide for information on applying roles to users

▶ To apply roles to a task

1. In a role-based Solution Explorer task view, select the task that you want to apply roles to.
2. Right-click the task, and then choose Task Revisions.

3. On Task Revisions, choose Roles from the Form menu.
4. On Task Where Used, click Find.
5. Choose the parent of the task to which you want to apply roles, and then click Select.
6. On Role Definition, choose the a role that you want to apply to the task, and then choose Change Status from the Row menu.

   A checkmark appears to indicate the role is applied to the task. To remove a checkmark, choose Change Status from the Row menu again. To apply all roles to the task, choose Enable All from the Form menu.



Task ID BPM944072724307 Enter batch control totals in

	Role	Description
✓	ADMIN	ADMIN
	ANK_GRP0	ANK_GRP0
	ANK_GRP1	ANK_GRP1
	ANK_GRP2	ANK_GRP2
✓	APPTOOLS1	APPTOOLS1
✓	APPTOOLS2	APPTOOLS2
✓	APPTOOLS3	APPTOOLS3
	ATLANTA	ATLANTA

Row:11

7. Click Close.
8. On Task Revisions, click OK.

Changing a Task

When you change a task using this process, you affect all instances of the task in the Solution Explorer. See *Setting Processing Options for a Task* and *Setting Versions for a Task* for information about affecting specific instances of tasks.

▶ To change a task

1. In a Solution Explorer task view, select the task that you want to change.
2. Right-click the task, and then choose Task Revisions from the pop-up menu.

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3. On Task Revisions, complete any changes that you want to make to the task, and then click OK.

   See Creating a Task for more information about the available grid options.

Deleting a Task

You can delete an instance of a task from a task view menu. However, performing this action does not delete the task itself; it merely eliminates the task from the relationship. To delete a task from the system, you must go into the Work With Tasks form, locate the Task, and then delete it from the Task Master table.

This topic explains the steps required to accomplish the following tasks:

- Deleting an instance of a task
- Deleting a task from the system

Deleting an Instance of a Task

You can delete a task from a relationship in a task view of Solution Explorer. Doing so deletes the task only from the task view; it still exists in the Task Master table and in any other relationship where it has been inserted. Furthermore, it can still be inserted into other task menus.

▶ **To delete an instance of a task**

1. In Solution Explorer, open the task view that contains the task relationship you want to delete.
2. Right-click the task you want to delete, and then choose Delete Relationship from the menu.

   The system confirms the deletion.

Deleting a Task from the Task Master Table

If you want to delete a task from the system completely, you must delete it from the Task Master table. Before you can do so, however, you must first delete all of the task’s relationships. This is equivalent to deleting the task in each task view menu where it appears. The process below describes deleting the relationships as well as deleting the task itself.

▶ **To delete a task from the Task Master table**

1. In Solution Explorer, choose Work With Tasks from the Tools menu.

2. Click Find.

   Use the QBE row to refine your search.

3. Select the task you want to delete, and then choose Where Used from the Row menu.
4. On Task where Used, search for the parent of the current task by clicking Find.

   The task might have more than one parent. If so, all of the parents appear.

5. Choose the parent of the task you want to delete, and then click Select.
6. On Task Relationship Revisions, select the task you want to delete, and then click Delete.

   The system confirms the deletion.

7. Click OK.
8. Repeat steps 5–7 for each parent of the task in the list.
9. When finished, on Task where Used, click Close.
10. On Work With Tasks, select the task you want to delete, and then click Delete.

    The system confirms the deletion.

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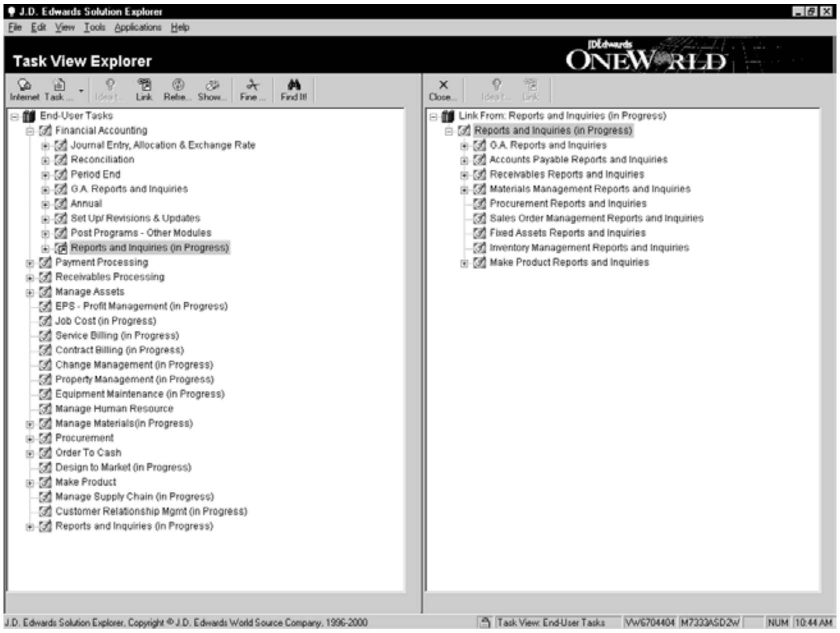
Working with Task Links

A task link is a shortcut to another task. The linked task appears in an alternate window in the Solution Explorer, so you can still see your point of origin. Typically, links are made to tasks with children—nodes. When you link to a node, all of its children are visible in the new window.


J.D. Edwards Solution Explorer
File Edit View Tools Applications Help
Task View Explorer
JDEdwards ONEWORLD
Internet
Task ...
Ident...
Link
Refre...
Show...
Fine ...
Find It!
Close...
Ident...
Link
J.D. Edwards Solution Explorer, Copyright © J.D. Edwards World Source Company, 1996-2000
Task View: End-User Tasks
VW6704404
M7333ASD2W
NUM
10:44 AM

- End-User Tasks
  - Financial Accounting
    - Journal Entry, Allocation & Exchange Rate
    - Reconciliation
    - Period End
    - G.A. Reports and Inquiries
    - Annual
    - Set Up/ Revisions & Updates
    - Post Programs - Other Modules
    - Reports and Inquiries (in Progress)
  - Payment Processing
  - Receivables Processing
  - Manage Assets
  - EPS - Profit Management (in Progress)
  - Job Cost (in Progress)
  - Service Billing (in Progress)
  - Contract Billing (in Progress)
  - Change Management (in Progress)
  - Property Management (in Progress)
  - Equipment Maintenance (in Progress)
  - Manage Human Resource
  - Manage Materials(in Progress)
  - Procurement
  - Order To Cash
  - Design to Market (in Progress)
  - Make Product
  - Manage Supply Chain (in Progress)
  - Customer Relationship Mgmt (in Progress)
  - Reports and Inquiries (in Progress)

- Link From: Reports and Inquiries (in Progress)
  - Reports and Inquiries (in Progress)
    - G.A. Reports and Inquiries
    - Accounts Payable Reports and Inquiries
    - Receivables Reports and Inquiries
    - Materials Management Reports and Inquiries
    - Procurement Reports and Inquiries
    - Sales Order Management Reports and Inquiries
    - Fixed Assets Reports and Inquiries
    - Inventory Management Reports and Inquiries
    - Make Product Reports and Inquiries

You can link to any task in any task view except for the task view node itself. Optionally, you can link to a task view variant.

When you create links, you must identify the link's two members: the task that you are linking from and the task that you are linking to. The task you are linking from is called the link task. The link task displays the link indicator. The task you jump to, called the link target, appears in the second window.

You cannot link to a task view node.

Working with task links describes the following procedures:

- ❑ Creating a link to a task
- ❑ Creating a link to a variant task view menu
- ❑ Deleting a link

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Creating a Link to a Task

To create a task link, you revise the task relationships.

▶ To create a link to a task

1. In a task view of Solution Explorer, select the parent of the task that you want to make the link task.
2. Right-click the task you selected, and then choose Task Relationships.

   The Task Relationship Revisions form appears, listing the child tasks of the parent you selected.

3. From the list of tasks, click the task you want to set as the link task.
4. From the Row menu, choose Link To.
5. On the Link To form, click the Find Relationship button.
6. On the Find Relationship form, complete the following fields, and then click Find:

   - Task View

     Use the Search button to bring up the Task View Search & Select form.

   - Parent Task ID

     Enter the parent of the task you want to set as the link target. Use the Search button to bring up the Task Search & Select form.

   The Find Relationship form lists all of the child tasks of the parent you searched on.

7. Choose the task you want to set as the link target, and then click Select.

   The link target is the task that appears in the second window when the user invokes the link. The system uses the information you provided to complete the required fields in the Link To form.

8. Click OK.
9. On Task Relationship Revisions, click OK.

   The link task appears in the task view with a red arrow to indicate that it links to another task.

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Creating a Link to a Variant Task View Menu

Creating a link to a variant is useful when you link task views as part of completing a business process. You might decide that users who link from one task view to another might need variants of a task relationship.

Before You Begin

❑ Apply the variant to the task link child.

▶ To create a link to a variant task view menu

1. In a task view of Solution Explorer, select the parent of the task that you want to make the link task
2. Right-click the task you selected, and then choose Task Relationships.

   The Task Relationship Revisions form appears, listing the child tasks of the parent you selected.

3. From the list of tasks, click the task you want to set as the link task.
4. From the Row menu, choose Link To.
5. On the Link To form, click the Find Relationship button.
6. On the Find Relationships form, complete the following fields, and then click Find:
   - Task View

     Use the Search button to bring up the Task View Search & Select form.

   - Parent Task ID

     Enter the parent of the task you want to set as the link target. Use the Search button to bring up the Task Search & Select form.

   The Find Relationships form lists all of the child tasks of the parent you searched on.

7. Choose the task you want to set as the link target, and then click select.

   This is the base of the variant task view that appears in the second window when the user invokes the link. The system uses the information you provided to complete the required fields in the Link To form.

8. In the Link to Variant field, enter the Variant ID.

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This is the variant task view that users see in the second window when they activate the link. Use the Search button in the Link to Variant control to locate the variant to which you want to link.

9. Click OK.
10. On Task Relationship Revisions, click OK.

    The link task appears in the task view with a red arrow to indicate that it links to another task.

Deleting a Link

To delete links, you revise the task relationships.

▶ To delete a link

1. In a task view of Solution Explorer, select the task link parent with the link you want to remove.
2. Right-click the task you selected, and then choose Task Relationships from the menu.

   The Task Relationship Revisions form appears.

3. From the Row menu, select Remove Link To.
4. Click OK.

   The system removes the link.

Documenting Tasks

Task documentation allows new system users to acquaint themselves with the purpose of a task, the steps required to complete it, and points to be aware of before beginning a task. Task documentation enables other users to create notes that clarify a business process and to provide links to other documents that result from completing a task, such as an invoice.

Many J. D. Edwards tasks already have documentation when you install the Solution Explorer. However, you can edit documentation using the Solution Explorer toolbar and an HTML editing tool, such as Microsoft Word. In addition, you can use your editing tool to write your own documentation.

Warning: Any modifications you make to J. D. Edwards-provided documentation will be lost when you update your system. Documentation you create yourself, however, will remain intact.

The Solution Explorer task view includes a documentation window, which displays task documentation in HTML format. When you categorize a piece of documentation for the Solution Explorer, you define it as being one of several instruction types, including Summary, Detail, Before You Begin, Notes, Deliverables, or Custom. These instruction types correspond to the names of the tabs that appear in the documentation window. For example, you might create two documents, defining one to be Summary and the other to be Detail. Consequently, users viewing documentation for that task would see two tabs in their documentation window: Summary and Detail. The documentation window is available both in the Solution Explorer and within the Universal Director.

Documenting tasks discusses the following topics:

- ❑ Understanding task documentation order of precedence
- ❑ Creating documentation
- ❑ Revising documentation
- ❑ Adding a documentation category

Understanding Task Documentation Order of Precedence

To determine what to display in the task documentation window, the Solution Explorer performs the following steps. For each task, the system performs these steps for every documentation category in the system.

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1. The system checks to see if documentation has been associated with the current task. If such documentation exists, the system displays that documentation. If not, the system proceeds with the second check.
2. If no documentation is available on the task level, the system checks to see if documentation has been associated with the task view. Task view documentation is actually associated with the task view node (the first task at the top of the task view menu). If such documentation exists, the system displays that documentation. If not, the system proceeds with the third check.
3. If no documentation is available on either the task or the task view levels, the system checks for global documentation that resides in the root of the documentation directory. If the file exists, then the system displays the file's contents in the documentation window. If the file does not exist, the system does not display a tab for that category.

You can create and edit global documentation, but you must do so outside of the Solution Explorer. Note that each category uses a different file for global text. For example, if you wanted global documentation for both the Detail and Consequence categories, you would create two files: detail.htm and consequence.htm.

The documentation associated with parent tasks is not checked as part of this order of precedence. For example, in a task view, you might have a parent task containing a child task. Even if the parent task has documentation associated with it, if the child task does not have documentation, the system displays the documentation associated with the task view and not the documentation associated with its parent.

Creating Documentation

You can write documentation of different types for any task in the Solution Explorer task view. Documentation might provide general information about a task, specific steps that you follow to complete a task, discussion of steps to take before you begin a task, or information that you customize for a particular task.

The documentation appears in the Solution Explorer documentation window each time you select a task in a task view, provided you have chosen Show from the View Menu and clicked Task Documentation. Tabs in the documentation window represent documentation instruction types that exist for a task. If you have not written documentation for the task, you can display a web site or HTML message for each task that does not have documentation.

To create the documentation, you click the scroll arrow on the Edit button in the pane and choose the type of documentation you want to provide.

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Before You Begin

- ❑ In the Solution Explorer, from the View menu, select Show and then select Task Documentation. This option displays the task documentation window.

▶ To create documentation for tasks

1. In a task view of Solution Explorer, select a task or task view.

   The documentation appears in the documentation window.

2. In the documentation window, click the scroll arrow on the Edit button in the documentation window toolbar.
3. Choose an instruction type, such as Summary, from the drop-down menu.

   The Solution Explorer Documentation form appears.

   The Solution Explorer Documentation form contains the file name, which refers to the instruction type you chose, such as Summary, and the full path to the documentation file you are writing.

4. Click Yes to continue.

   The system launches the editing tool that you use in your system, such as Microsoft Word.

5. Using the editing tool, write the documentation.
6. Save and close the document when you are finished.

   The system creates a tab that represents the documentation instruction type that you created. You might need to click Refresh to see the new documentation.

Revising Documentation

The system also allows you to revise documentation that you have already written. To revise documentation, click the Edit button in the documentation window, open the document, make changes, and save it.

Before You Begin

- ❑ In the Solution Explorer, from the View menu, select Show and then select Task Documentation. This option displays the task documentation window.

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▶ To revise documentation

1. In a task view of Solution Explorer, select a task containing documentation you want to revise.

   The documentation appears in the documentation window.

2. Click the tab that represents a type of previously created documentation, such as Summary.
3. Click Edit.

   The system launches the editing tool that you used to create the documentation, and retrieves the HTML file you created.

4. Edit the existing document.

   If your HTML editor is Microsoft Word, the document might appear blank initially. In the MicroSoft Word toolbar, click View, then choose HTML Source. You can now edit the HTML document.

   Note: If the documentation's Special Handling parameter is blank, you cannot edit the file. When you click the pencil button, the Solution Explorer Documentation form informs you that the file cannot be edited. See *Adding an Instruction Type* for more information.

5. Save and close the document when you are finished.

   You might need to click Refresh to see the new documentation.

Adding a Documentation Category

Instruction types refer to the category of documentation for tasks in your system. For example, Summary is an instruction type that provides a high-level overview and definition of the task. The system allows you to create an instruction type for your system by adding a type to the UDC table that stores instruction types and information about them. Each documentation type is identified by its own tab in the documentation window.

When you add an instruction type, you can specify whether you want to allow the documentation files to be edited. If you want to control access to documentation, make sure that you apply a special handling parameter that prevents users from editing the documents.

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▶ To add a documentation category

1. In System Administration Tools (GH9011), launch User Defined Codes (P0004A).
2. On Work With User Defined Codes, enter H90 in the Produce Code field.
3. In the User Defined Codes control, enter IN for Instruction Types.
4. Click Find, and then click Add.
5. In the User Defined Codes form, enter data to the following fields and click OK:
   - Codes: The order in which the tabs in the documentation window will appear
   - Description 1: The instruction type, which is the tab title that will appear in the documentation window
   - Description 2: The file name, which is the name of the instruction type with an HTML extension
   - Special Handling: The display properties of the documentation. An E means that the file will be displayed and is editable. If you leave the column blank, the file displays, but it cannot be edited. An N means that the file will not be displayed.
6. Close the Work With User Defined Codes form.

Activators

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Activators

To make the process of working through a series of tasks easier and less time consuming for end users, Solution Explorer provides a way to group tasks together. This group of tasks is called an activator. The system displays these tasks to the user with a tool called the Universal Director. With the Universal Director, users can work through tasks sequentially by clicking the Next button after they complete each task.

For example, you can create an activator containing the steps necessary to close out a quarter.

This section discusses the following topics:

- ❑ Understanding Activators
- ❑ Creating an Activator

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Understanding Activators

An activator is a sequential series of tasks that are required to perform a process that is integral to the functioning of your business.

The task that can launch an activator is always a parent task and is designated by an activator flag. Typically, the launching task is a non-software task under which the rest of the activator tasks reside. After you have created the activator, users executing the activator launch the Universal Director, a feature that provides a self-contained area in which you work with all the tasks in the relationship. While you are using the Universal Director to run activator tasks and task relationships, the system uses data mapping to pass data between tasks in the task relationship. The Universal Director guides you through each step of the process until you reach completion.

If you want to make changes to the activator, you make them in the Solution Explorer task view. Any changes that you make to the task relationship are automatically reflected when the Universal Director runs.

This topic discusses the main components related to activators:

- Activator flags
- Universal Director
- Data mapping

Activator Flags

An activator flag designates a task as a parent task under which the rest of the activator tasks reside. To enable an activator flag, you enter an activator type in the Task Revisions form. With the activator flag turned on, the task name displays a lightbulb symbol in the task view.

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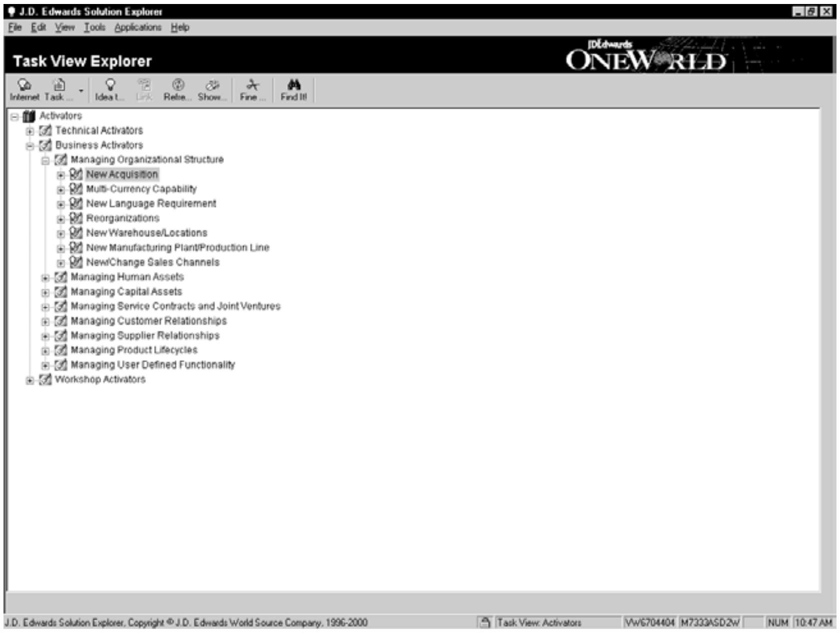
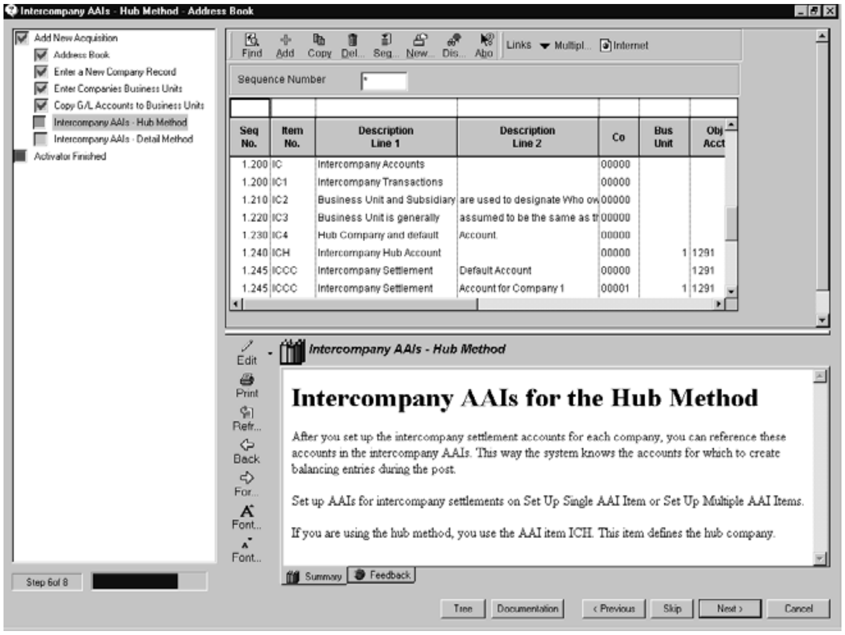


- Activators
  - Technical Activators
  - Business Activators
    - Managing Organizational Structure
      - New Acquisition
      - Multi-Currency Capability
      - New Language Requirement
      - Reorganizations
      - New Warehouse/Locations
      - New Manufacturing Plant/Production Line
      - New/Change Sales Channels
    - Managing Human Assets
    - Managing Capital Assets
    - Managing Service Contracts and Joint Ventures
    - Managing Customer Relationships
    - Managing Supplier Relationships
    - Managing Product Lifecycles
    - Managing User Defined Functionality
  - Workshop Activators

J.D. Edwards Solution Explorer, Copyright © J.D. Edwards World Source Company, 1996-2000 | Task View: Activators | VW6704404 M7333ASD2W | NUM 10:47 AM

Double-clicking an activator or clicking the Idea to Action button in the Solution Explorer toolbar launches the Universal Director. The Universal Director presents each of the tasks in the process in sequential fashion. Within the Universal Director, users work with any interactive and batch applications necessary to complete the business process keyed by the activator.



☑ Add New Acquisition
- ☑ Address Book
- ☑ Enter a New Company Record
- ☑ Enter Companies Business Units
- ☑ Copy G/L Accounts to Business Units
- ▨ Intercompany AAIs - Hub Method
- □ Intercompany AAIs - Detail Method

■ Activator Finished

Step 6of 8

Sequence Number *

Seq No.	Item No.	Description Line 1	Description Line 2	Co	Bus Unit	Obj Acct
1.200	IC	Intercompany Accounts		00000		
1.200	IC1	Intercompany Transactions		00000		
1.210	IC2	Business Unit and Subsidiary	are used to designate Who ow	00000		
1.220	IC3	Business Unit is generally	assumed to be the same as tr	00000		
1.230	IC4	Hub Company and default	Account.	00000		
1.240	ICH	Intercompany Hub Account		00000	1	1291
1.245	ICCC	Intercompany Settlement	Default Account	00000		1291
1.245	ICCC	Intercompany Settlement	Account for Company 1	00001	1	1291

Intercompany AAIs - Hub Method

Intercompany AAIs for the Hub Method

After you set up the intercompany settlement accounts for each company, you can reference these accounts in the intercompany AAIs. This way the system knows the accounts for which to create balancing entries during the post.

Set up AAIs for intercompany settlements on Set Up Single AAI Item or Set Up Multiple AAI Items.

If you are using the hub method, you use the AAI item ICH. This item defines the hub company.

Any sequence of tasks constitutes a task relationship in a broad sense. The tasks that you tie together might be tightly related. However, when you designate a parent task as an activator and launch the Universal Director, the system formally presents the tasks together in one unifying view. In addition, the system passes

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data between forms without hard-coded form interconnections. To alter a business process keyed by an activator, you change the task relationship in the Solution Explorer task view.

In addition, you can designate the type of activators you want to set up. Activator types include business and technical activators. Although the activator type does not affect how the activator works, by defining an activator as one type or another, you can more easily search for an activator.

You use business activators to implement rapid change to your system without having to consume development resources. You designate a task as a business activator if it is a part of the essential processes of your system. For example, a task such as New Company Acquisition would be a business activator. It triggers a process that ties together a sequence of related tasks, each of which you complete in a specified order to accomplish the goal. Other business activators might include adding a warehouse or creating customized reports and invoices.

You designate a task as a technical activator if it is part of the management and maintenance of your system infrastructure. Technical activators offer simplified system management in such areas as permissions, server administration, and component interfaces. For example, these activators allow information technologists to implement and maintain a package installation process. Technical activators, which automate processes such as these, free technical professionals to work on ensuring that the system performs to its maximum capability.

Universal Director

Activators enable you to create task relationships and pass data between forms without writing code that is embedded in Event Rules or in Workflow. The Universal Director creates a compact area in which users view and work with the tasks in your work process. The Universal Director presents the activator and all the tasks related to it in the sequence that you created in Solution Explorer.

The Universal Director allows you to move forward and backward within the task sequence, and it clearly displays your position within that sequence. You accomplish this movement within the view by using the director bar.

The Documentation view is also visible to you when you are working with the Universal Director. The system displays the documentation that corresponds to the particular task you are working on in the Universal Director view. You can manipulate and edit the documentation while you work in the Universal Director, just as you can from Solution Explorer.

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In short, the Universal Director presents another view of the activator parent-child task relationships that exist in the Solution Explorer task view. However, it also provides the interface for you to execute the tasks in those relationships.

Data Mapping

The Universal Director provides data mapping, which passes data between forms as you work on the tasks in the sequence. This data mapping mechanism ensures that you can pass data between forms logically without hard-coding form interconnections.

During data mapping, the Universal Director validates that a value-containing header control or grid column in one form has a header control or grid column match in the next form. If the match exists, the Universal Director passes the value. If no match exists, data mapping fails and the Universal Director generates an error message. You activate data mapping by entering Y in the Auto Data Passing grid column in the Task Relationships Revision form for each task that is to pass data to another task within the task relationship.

Creating an Activator

To create an activator, you first need to create and designate a parent task as the launch task, and then you turn on the activator flag for that task. A launch task serves as the parent task of a relationship that constitutes a key business or technical activator. Typically, launch tasks are non-software tasks. You create them in the same way you create any other kind of task. A task that you have designated as an activator appears in the task view with a lightbulb symbol.

Once you have created the launch task, you can place as many child tasks under it as you require to complete the process. Then, when you select the launch task and click the Idea to Action button, the system launches the Universal Director. From the Universal Director, you can step through the entire sequence from beginning to end, working in any applications that are necessary to reach completion.

▶ To create an activator

1. In a Solution Explorer task view, create or select a non-software task.

   If you select a task, right-click the task, and then select Task Revisions.

2. On the Task Revisions form, complete the fields and options on the Common, Executable, and Resources tabs as required, making sure to enter either a 1 or a 2 to the Activator Type control, and then click OK.

   The system places a lightbulb symbol on the task icon to designate the task as being a launch point for an activator.

3. To finish creating the activator, insert as any tasks required to complete the transaction in the proper order.

   You can place tasks in the activator by creating them or by sending them to the task view from another task view and then dragging and dropping them in their proper locations.

See Also

- *Creating a Task*

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Example: Creating an Activator

This example creates an activator for adding new users to the system. After completing the process, you can launch its activator and the Universal Director will automate the process of completing the steps. This particular activator already exists in the Solution Explorer; you might want to locate it and study it before you begin the example. Then you will have a model against which to compare the activator you create with this example.

▶ To create an activator

1. Determine the steps required to complete the process.

   Generally, you will need to decide what applications a user will need to run and in what order they have to be run.

   In the add user example, the following list identifies the steps to be completed and the application used to complete each step. Later, each step will be the basis for its own task in the process. Notice that the task name is not the same as the application name. Although you could use the application name as the task name, describing the action to be performed rather than listing the application to use makes the process clearer to the user. In this example, all of the applications are OneWorld applications.

   Observe that some applications have more than one step applied to them.

Add user profile	User Profile Revisions (P0092)
Add user profile environments	User Profile Revisions (P0092)
Add user profile security	OneWorld Security (P980WSEC)
Add user row security	Security Workbench (P00950)
Add user action security	Security Workbench (P00950)
Add user machine	Deployment Locations Application (P9654A)

2. Create the parent task.

   This task will serve as the launch task later in the example. The parent task should be a placeholder—a non-software task. When you create the task, complete the Task Revisions form as follows. If a field is not mentioned, then leave it blank.

- Task ID: H95_ADD NEW USER
- Task Name: Add New User
- Common tab fields
  - Product Code: H95
  - Activator Type: 1
  - Active: (selected)
- Executable tab fields: select the Non-Software option

Putting a value in the Activator Type field is critical; if you do not, the system will not mark the task as a launch task and the user will not be able to access the Universal Director to automate the child tasks.

3. Add a task called Add User Profile as the first child of the Add New User task. When you create the task, complete the Task Revisions form as follows. If a field is not mentioned, then leave it blank.
   - Task ID: H95_ADD USER PROFILE
   - Task Name: Add User Profile
   - Common tab fields
     - Product Code: H95
     - Active: (selected)
   - Executable tab fields: select the Interactive option
     - Application: P0092
     - Version: ZJDE0001
     - Form: 0092A
     - Option Code : 1
4. Add the remaining tasks, in order, as children of Add New User following the Add User Profile task.

   In this example, you are creating all of the tasks for the process. However, you can insert already existing tasks into the process as well. You can also send tasks to the task view and then drag and drop them in the correct place.

   Set up each task similarly to how you were instructed to name the last two tasks. Use the following parameters on the Executable tab of the Task Revisions form:

   - Add User Profile Environments
     - Application: P0092

     - Version: ZJDE0001
     - Form: 0092C
     - Option Code : 1
   - Add User Profile Security
     - Application: P98OWSEC
     - Version: ZJDE0001
     - Form: W98OWSEC
     - Option Code: 1
   - Add User Row Security
     - Application: P00950
     - Version: ZJDE0001
     - Form: W00950F
     - Option Code: 1
   - Add User Action Security
     - Application: P00950
     - Version: ZJDE0001
     - Form: W00950M
     - Option Code: 1
   - Add User Machine
     - Application: P9654A
     - Form: W9654AB

5. To test the process, click the Add New User activator, and then click the Idea to Action button on the Toolbar.

   The steps in the tree on the left of the Universal Director mirror the tasks you added to create the process.

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Solution Modeler

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Solution Modeler

Solution Modeler is intended to provide the ability to select from, manage, and create process models that are fully interactive with OneWorld applications. Based on a special version of ProVision Workbench^{TM}, the Modeler uses its built-in interoperability features to provide a seamless merging of the two technologies. Consequently, each Modeler task can be made to launch a OneWorld application or a windows executable.

The Solution Modeler is an optional member of the Solution Accelerator Suite.

Included in the Solution Modeler are several hundred pre-configured process models. Each task that is linked to a OneWorld application appears in the End-User Task View in the Solution Explorer. Therefore, if you change the properties of one of these tasks in the Modeler, you change how the task functions in the Explorer. If you add a task to a process model and want it to appear in the End-User Task View, you must assign the task a relationship (that is, a location in the task view) and one or more roles. Only those users with corresponding roles can see your new task.

The purpose of this topic is to describe how to endow a Solution Modeler task with Solution Explorer task capabilities such as launching an application, prompting for values, and so forth. For information about creating and modifying models and model components, please refer to the ProVision Workbench documentation.

This topic discusses the following items:

❑ Working with business processes

❑ Working with Modeler tasks

❑ Managing disk space and backups

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Working with Business Processes

Business processes usually do not follow the same path each time they are performed. You can compare different paths through a process to examine alternatives by creating process scenarios. A scenario is all or a portion of a process's workflow that defines a particular way in which the business executes the process.

J.D. Edwards provides several hundred pre-defined business processes and scenarios that represent suggested solutions for specific business process needs. You can select from these scenarios or modify them to define new ones.

To launch the Solution Modeler, select Solution Modeler from the Tools menu in any Solution Explorer task view.

Working with business processes is composed of the following topics:

- ❑ Viewing OneWorld business processes
- ❑ Working with scenarios

Viewing OneWorld Business Processes

Use the following task to view the pre-defined business processes. For information about creating and maintaining your own business processes, please refer to the ProVision Workbench documentation.

▶ To view OneWorld business processes

1. Launch the Solution Modeler and ensure the OneWorld Business Process Models repository is open.

   Any repository that appears in boldface type in the Repository View window is open.

   To open a repository, expand the repository in the Repository View window, and then double-click one of the notebooks underneath the repository. You might need to provide a user ID and password, depending on how the repository has been configured.

2. Expand the Workflow Modeler object in the Model View window.

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3. Double-click the OneWorld Business Process Models object.

   The OneWorld Business Process Model appears in the main window of the Modeler. This model is divided into the following categories:

   - Procure to Pay
   - Order to Cash
   - Consumption to Reorder
   - Concept to Opportunity
   - Demand to Available
   - Manage the Business

4. Drill down to more discrete process models by clicking on the down arrow button on a task and choosing Workflow Modeler.

   The system opens a new view each time you drill down. Each view has its own tab at the bottom of the form, and you can alternate between views by clicking on their tabs. To close a view, click a tab, and then click the bottommost close button (the X) in the upper right corner of the form. Do not click the uppermost close button, or you will exit the Solution Modeler.

Working with Scenarios

Scenarios are variations of a business process model. In the base model, all of the tasks are considered to be active. In a scenario, you can disable or add extra tasks. Active (recruited) tasks appear in color in the scenario, while disabled (not recruited) tasks might appear in gray or might be hidden based on how the scenario is configured.

You use the Scenario toolbar to create, view, and modify scenarios. Click the Scenario button on the Object Tools toolbar to activate the Scenario toolbar. This activation applies only to the current business process. If you have multiple business process views available and you switch to a different view, you must activate the Scenario toolbar again to make it available in the view.

To select a scenario of the current business process, choose it from the drop-down field on the Scenarios toolbar. After you select a scenario, it is used as the default parent process in each sub-process you define for it.

Note: To properly link a scenario of a sub-process to its parent scenario, both the parent and child scenarios must have the same name. For example, you might have a base process, Enter Work Order, that includes a number of sub-processes, including one called Create Work Order Header. If you made a scenario of the parent called Enter Work Order v1, then drilled down into the Create Work Order Header sub-process and created a scenario of that sub-process, you would need to call that scenario Enter Work Order v1 as well.

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To keep existing scenarios for comparison, J.D. Edwards recommends you create your own scenarios using existing scenarios as a base from which to start rather than modifying the existing scenarios. This process is known as cloning. After cloning a scenario, you can modify the clone without affecting the base scenario. You might want to modify a scenario; following are some of the most common reasons for modifying a scenario:

- To change the tasks or flow that are included in the scenario
- To change the names of the tasks that apply to a specific scenario
- To change the program version that is assigned to a task in a specific scenario

Working with scenarios is composed of the following tasks:

- Cloning a scenario
- Changing included tasks and flow

See Also

❑ *Working with Modeler Tasks*

▶ To clone a scenario

1. Open the scenario you want to clone.
2. Click Maintain on the Scenario toolbar.
3. On Scenario Maintenance, click the scenario you want to clone, and then click Clone.

   The system adds a new, unnamed scenario to the list.
4. Ensure the new scenario is highlighted, and then click Modify.
5. On Scenario Detail, complete the following fields:
   - Name
   - Desc
6. Choose one of the following options:
   - Hide non-members

     Choose this option to keep not recruited tasks from being displayed in the scenario.
   - Ghost non-members

     Choose this option to display not recruited tasks in gray in the scenario.

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7. Click OK.

▶ To change included tasks and flow

1. Open the scenario you want to change.
2. Use the standard Modeler tools to add tasks and change the flow among the tasks.
3. To change the recruitment status of a task, click Recruitment on the Scenario toolbar.

   The Scenario Recruitment dialog box appears.
4. Click on tasks to toggle their status between recruited and not recruited, and then click OK on Scenario Recruitment.

Working with Modeler Tasks

Working with Modeler Tasks

You can add Solution Explorer task functionality to any Solution Modeler task. Additionally, you can define and modify OneWorld scenarios for each Modeler task.

Working with Modeler tasks describes the following topics:

- ❑ Associating Modeler and Explorer tasks
- ❑ Overriding a task in a scenario

Associating Modeler and Solution Explorer Tasks

After creating a Modeler task, you then create a Solution Explorer task to associate with it. You create Solution Explorer tasks while you are in the Solution Modeler. Once the Solution Explorer task is associated with the Modeler task, you can interact with the Modeler task in many of the same ways you can with tasks in Solution Explorer task views. For example, you can prompt for values or versions, or execute the task's application (if it is a software task).

Associating Modeler and Explorer tasks describes the following topics:

- Accessing the interoperability menu
- Assigning properties to a task
- Modifying task properties
- Launching an associated task
- Linking to an Explorer task
- Executing a link
- Setting processing options for a task
- Selecting a version of a task to execute

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Accessing the Interoperability Menu

All task association in the Solution Modeler is performed through the interoperability menu. To perform any of the tasks in this section, you must first complete the following steps to display the interoperability menu.

▶ To access the interoperability menu

1. From Solution Explorer, select Solution Modeler from the Tools menu.

   Solution Modeler opens in a new Window.

2. Open a process model or create a new one.
3. Right-click the Modeler task you want to work with, and then select Solution Explorer Interoperability.

Assigning Properties to a Task

You can associate an Explorer task with a Modeler task. Then, you can launch the Explorer task from the Modeler task by right-clicking the task and then choosing Idea To Action from the interoperability menu.

▶ To assign properties to a task

1. Right-click the Modeler task that you want to assign properties to.
2. Select Solution Explorer Interoperability, and then select Properties.

   The system confirms that you want to create a task.

3. Click Yes.
4. On Task Revisions, create an Explorer task to associate with the Modeler task.

   See Creating a Task for instructions on creating an Explorer task.

   Note: Assigning roles and End-User task view relationships to a task are described in *Creating a Task.* Keep in mind that the system does not automatically assign roles or task view relationships, so you must assign them yourself as described in the referenced task.

5. Click OK.

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Modifying Task Properties

After you have associated an Explorer task with a Modeler task, you can change the properties of the task from the Modeler.

▶ To modify task properties

1. Right-click a Modeler task with the associated Explorer task that you want to modify.
2. Select OneWorld Xe, and then select Properties.
3. On Task Revisions, change the properties that you want, and then click OK.

Launching an Associated Task

After you have associated an Explorer task with a Modeler task, you can launch the action defined by the associated task from the Modeler.

▶ To launch an associated task

1. Right-click a Modeler task with the associated Explorer task that you want to launch.
2. Select OneWorld Xe, and then select Idea To Action.

   The system launches the associated task.

Linking to an Explorer Task

Just as you can with Explorer tasks, you can create a link from a Modeler task to an Explorer task. For more information about linking tasks (including linking to task variants), see *Working with Tasks Links.*

▶ To link to an Explorer task

1. Right-click a Modeler task with the associated Explorer task that you want to add a link to.

   You can also create a link when you first create a new Explorer task.

2. Select OneWorld Xe, and then select Properties.
3. On Task Revisions, select Link To from the Form menu.
4. On the Link To form, click the Find Relationship button.

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5. On the Find Relationship form, complete the following fields, and then click Find:

   - Task View

     Click the Search button to bring up the Task View Search & Select form.

   - Parent Task ID

     Enter the parent of the task you want to set as the link target. Click the Search button to bring up the Task Search & Select form.

   The Find Relationship form lists all of the child tasks of the parent you searched on.

6. Choose the task you want to set as the link target, and then click Select.

   The link target is the task that will appear in the second window when the user invokes the link. The system uses the information you provided to complete the required fields in the Link To form.

7. Click OK.
8. On Task Relationship Revisions, click OK.

Executing a Link

After you have created a link from a Modeler task to an Explorer task, you can execute the link.

▶ To execute a link

1. Right-click the Modeler task with the link that you want to execute.
2. Select OneWorld Xe, and then select Link To.

   The system switches to the ActivEra Solution Explorer and displays the linked task in a second window.

Setting Processing Options for a Task

After you have associated an Explorer task with a Modeler task, you can set its processing options, when applicable, from the Modeler.

▶ To set processing options for a task

1. Right-click the Modeler task with an associated Explorer task that you want to set processing options for.
2. Select OneWorld Xe, and then select Prompt for Values.
3. On Processing Options, set the processing options values as desired, and then click OK.

Selecting a Version of a Task to Execute

After you have associated an Explorer task with a Modeler task, you can choose which version of its associated application to execute.

▶ To select a version of a task to execute

1. Right-click the Modeler task with an associated Explorer task that you want to select a version to execute.
2. Select OneWorld Xe, and then select Prompt for Version.
3. On Work with Versions, select the version you want to execute, and then click Select.

Overriding a Task in a Scenario

In some instances, you might want to maintain a task's place in a scenario but alter some aspect of it such as its name or the version of the application it opens. For example, you might have two offices that use identical processes to enter a new employee, but they use different versions of a form in an application to enter insurance options. You could use the same process model for both offices and then create a scenario with a task override to launch a different form for the second office.

Use the following procedure to perform a task override in a scenario.

▶ To override a task in a scenario

1. Open a scenario.
2. Double-click the task you want to override.
3. On Task, click the OneWorld tab.
4. Click Override.
5. Perform one of the following:
   - Choose a task from Select Override Task.

Override tasks are available only if the base business process model has multiple scenarios in which overrides already exist for the current task.

- Enter a name in Create New Override Task, and then click Add.

6. Click OK.
7. Right-click the task, then choose OneWorld Xe, and then choose Properties.

   If you created a new task, the system confirms the creation.

8. On Task Revisions, create or modify an Explorer task to associate with the Modeler task.

   See *Creating a Task* for instructions on creating an Explorer task.

   Note: Assigning roles and End-User task view relationships to a task are described in *Creating a Task.* Keep in mind that the system does not automatically assign roles or task view relationships, so you must assign them yourself as described in the referenced task.

9. Click OK.

Managing Disk Space and Backups

While working in a repository, it is essential to back up your work. By default, Solution Modeler automatically saves a new backup each time the repository is closed. The Modeler keeps the five latest backups. This rolling backup methodology is useful for working repositories. Static repositories such as the OneWorld Business Process Model repository do not require multiple backups, however. Because each backup requires an equal amount of disk space, you should change the number of backups of static directories the system saves. Solution Modeler allows you to set the number of backups for each repository in the application.

Managing disk space and backups is composed of the following topics:

- Accessing Repository Details
- Changing the number of rolling backups
- Managing backups

Accessing Repository Details

You perform all disk space and backup management tasks from the Repository Details form. Use the following task to access the Repository Details form.

▶ To access Repository Details

1. In the Repository view window, right-click the repository, and then choose Open.

   After the repository is opened, it appears in bold letters.

2. Right-click the repository again, and then choose Detail.

Changing the Number of Rolling Backups

Use this procedure to change the number of rolling backups saved for a specific repository. You can also disable the automatic backup option.

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▶ To change the number of rolling backups

1. On Repository Details, click the Options tab.

   See Accessing Repository Details for instructions about accessing the Repository Details form.

2. Enter the number of automatic backups you want to retain.

   You can enter any number of automatic back-ups. The default is 5. Remember that each backup takes the same amount of disk space, and unless you are managing a working repository, the file size of each subsequent backup will increase over time. This growth occurs because of the way the underlying database is set up. To manage the growth of backup files, you should periodically select "Compact database." If automatic back-ups are not required, remove the checkmark to "Automatically back up this repository whenever it is closed."

Managing Backups

In addition to the Modeler's automatic backup feature, you can create backups manually. After backups exist, you can restore data from them. You can rename backups to better manage them, and you can delete backups you no longer need.

Perform the following tasks:

- Creating a manual backup
- Renaming a backup
- Restoring a backup
- Deleting a backup

Before You Begin

❑ See Accessing Repository Details for instructions about accessing the Repository Details form.

▶ To create a manual backup

1. On Repository Details, click the Backups tab, and then click the Back up button.
2. On the Create Backup window, enter a name for the backup file, and then click Backup.

   The system creates a backup of the open repository.

▶ To rename a backup

1. On Repository Details, click the Backups tab, and then choose a backup file.
2. Click Details.
3. On Backup Details, enter a new name for the backup, and then click OK.

▶ To restore a backup

1. On Repository Details, click the Backups tab, and then choose a backup file.
2. Click Restore.

   The system confirms that you want to overwrite your existing repository.

3. Click Yes to overwrite your repository with the backup.

▶ To delete a backup

1. On Repository Details, click the Backups tab, and then choose a backup file.
2. Click Delete.

   The system confirms that you want to delete the backup.

3. Click Yes to accept the deletion.

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Glossary

Glossary

AAI. See automatic accounting instruction.

action message. With OneWorld, users can receive messages (system-generated or user-generated) that have shortcuts to OneWorld forms, applications, and appropriate data. For example, if the general ledger post sends an action error message to a user, that user can access the journal entry (or entries) in error directly from the message. This is a central feature of the OneWorld workflow strategy. Action messages can originate either from OneWorld or from a third-party e-mail system.

activator. In the Solution Explorer, a parent task with sequentially-arranged child tasks that are automated with a director.

ActiveX. A computing technology, based on object linking and embedding, that enables Java applet-style functionality for Web browsers as well as other applications. (Java is limited to Web browsers at this time.) The ActiveX equivalent of a Java applet is an ActiveX control. These controls bring computational, communications, and data manipulation power to programs that can "contain" them. For example, certain Web browsers, Microsoft Office programs, and anything developed with Visual Basic or Visual C++.

advance. A change in the status of a project in the Object Management Workbench. When you advance a project, the status change might trigger other actions and conditions such as moving objects from one server to another or preventing check-out of project objects.

alphanumeric character. A combination of letters, numbers, and symbols used to represent data. Contrast with numeric character and special character.

API. See application programming interface.

APPL. See application.

applet. A small application, such as a utility program or a limited-function spreadsheet. It is generally associated with the programming language Java, and in this context refers to Internet-enabled applications that can be passed from a Web browser residing on a workstation.

application. In the computer industry, the same as an executable file. In OneWorld, an interactive or batch application is a DLL that contains programming for a set of related forms that can be run from a menu to perform a business task such as Accounts Payable and Sales Order Processing. Also known as system.

application developer. A programmer who develops OneWorld applications using the OneWorld toolset.

application programming interface (API). A software function call that can be made from a program to access functionality provided by another program.

application workspace. The area on a workstation display in which all related forms within an application appear.

audit trail. The detailed, verifiable history of a processed transaction. The history consists of the original documents, transaction entries, and posting of records, and usually concludes with a report.

automatic accounting instruction (AAI). A code that refers to an account in the chart of accounts. AAIs define rules for programs that automatically generate journal entries, including interfaces between Accounts Payable, Accounts Receivable, Financial Reporting, General Accounting systems. Each system that interfaces with the General Accounting system has AAIs. For example, AAIs can direct the General Ledger Post program to post a debit to a specific expense account and a credit to a specific accounts payable account.

batch header. The information that identifies and controls a batch of transactions or records.

batch job. A task or group of tasks you submit for processing that the system treats as a single unit during processing, for example, printing reports and purging files. The computer system performs a batch job with little or no user interaction.

batch processing. A method by which the system selects jobs from the job queue, processes them, and sends output to the outqueue. Contrast with interactive processing.

batch server. A server on which OneWorld batch processing requests (also called UBEs) are run instead of on a client, an application server, or an enterprise server. A batch server typically does not contain a database nor does it run interactive applications.

batch type. A code assigned to a batch job that designates to which J.D. Edwards system the associated transactions pertain, thus controlling which records are selected for processing. For example, the Post General Journal program selects for posting only unposted transaction batches with a batch type of O.

batch-of-one immediate. A transaction method that allows a client application to perform work on a client workstation, then submit the work all at once to a server applicationfor further processing. As a batch process is running on the server, the client application can continue performing other tasks. See also direct connect, store and forward.

BDA. See Business View Design Aid.

binary string (BSTR). A length prefixed string used by OLE automation data manipulation functions. Binary Strings are wide, double-byte (Unicode) strings on 32-bit Windows platforms.

Boolean Logic Operand. In J.D. Edwards reporting programs, the parameter of the Relationship field. The Boolean logic operand instructs the system to compare certain records or parameters. Available options are:

EQ	Equal To.
LT	Less Than.
LE	Less Than or Equal To.
GT	Greater Than.
GE	Greater Than or Equal To.
NE	Not Equal To.
NL	Not Less Than.
NG	Not Greater Than.

browser. A client application that translates information sent by the World Wide Web. A client must use a browser to receive, manipulate, and display World Wide Web information on the desktop. Also known as a Web browser.

BSFN. See business function.

BSTR. See binary string.

BSVW. See business view.

business function. An encapsulated set of business rules and logic that can normally be reused by multiple applications. Business functions can execute a transaction or a subset of a transaction (check inventory, issue work orders, and so on). Business functions also contain the APIs that allow them to be called from a form, a database trigger, or a non-OneWorld application. Business functions can be combined with other business functions, forms, event rules, and other components to make up an application. Business functions can be created through event rules or third-generation languages, such as C. Examples of business functions include Credit Check and Item Availability.

business function event rule. See named event rule.

business view. Used by OneWorld applications to access data from database tables. A business view is a means for selecting specific columns from one or more tables whose data will be used in an application or report. It does not select specific rows and does not contain any physical data. It is strictly a view through which data can be handled.

Business View Design Aid (BDA). A OneWorld GUI ool for creating, modifying, copying, and printing business views. The tool uses a graphical user interface.

category code. In user defined codes, a temporary title for an undefined category. For example, if you are adding a code that designates different sales regions, you could change category code 4 to Sales Region, and define E (East), W (West), N (North), and S (South) as the valid codes. Sometimes referred to as reporting codes.

central objects. Objects that reside in a central location and consist of two parts: the central objects data source and central C components. The central objects data source contains OneWorld specifications, which are stored in a relational database. Central C components contain business function source, header, object, library, and DLL files and are usually stored in directories on the deployment server. Together they make up central objects.

check-in location. The directory structure location for the package and its set of replicated objects. This is usually \\deploymentserver\release\path_code\package\ packagename. The sub-directories under this path are where the central C components (source, include, object, library, and DLL file) for business functions are stored.

child. See parent/child form.

client/server. A relationship between processes running on separate machines. The server process is a provider of software services. The client is a consumer of those services. In essence, client/server provides a clean separation of function based on the idea of service. A server can service many clients at the same time and regulate their access to shared resources. There is a many-to-one relationship between clients and a server, respectively. Clients always initiate the dialog by requesting a service. Servers passively wait for requests from clients.

CNC. See configurable network computing.

component. In the ActivEra Portal, an encapsulated object that appears inside a workspace. Portal components

configurable client engine. Allows user flexibility at the interface level. Users can easily move columns, set tabs for different data views, and size grids according to their needs. The configurable client engine also enables the incorporation of Web browsers in addition to the Windows 95- and Windows NT-based interfaces.

configurable network computing. An application architecture that allows interactive and batch applications, composed of a single code base, to run across a TCP/IP network of multiple server platforms and SQL databases. The applications consist of reusable business functions and associated data that can be configured across the network dynamically. The overall objective for businesses is to provide a future-proof environment that enables them to change organizational structures, business processes, and technologies independently of each other.

constants. Parameters or codes that you set and the system uses to standardize information processing by associated programs. Some examples of constants are: validating bills of material online and including fixed labor overhead in costing.

control. Any data entry point allowing the user to interact with an application. For example, check boxes, pull-down lists, hyper-buttons, entry fields, and similar features are controls.

core. The central and foundation systems of J.D. Edwards software, including General Accounting, Accounts Payable, Accounts Receivable, Address Book, Financial Reporting, Financial Modeling and Allocations, and Back Office.

CRP. Conference Room Pilot.

custom gridlines. A grid row that does not come from the database, for example, totals. To display a total in a grid, sum the values and insert a custom gridline to display the total. Use the system function Insert Grid Row Buffer to accomplish this.

data dictionary. The OneWorld method for storing and managing data item definitions and specifications. J.D. Edwards has an active data dictionary, which means it is accessed at runtime.

data mart. Department-level decision support databases. They usually draw their data from an enterprise data warehouse that serves as a source of consolidated and reconciled data from around the organization. Data marts can be either relational or multidimensional databases.

data replication. In a replicated environment, multiple copies of data are maintained on multiple machines. There must be a single source that “owns” the data. This ensures that the latest copy of data can be applied to a primary place and then replicated as appropriate. This is in contrast to a simple copying of data, where the copy is not maintained from a central location, but exists independently of the source.

data source. A specific instance of a database management system running on a computer.

Data source management is accomplished through Object Configuration Manager (OCM) and Object Map (OM).

data structure. A group of data items that can be used for passing information between objects, for example, between two forms, between forms and business functions, or between reports and business functions.

data warehouse. A database used for reconciling and consolidating data from multiple databases before it is distributed to data marts for department-level decision support queries and reports. The data warehouse is generally a large relational database residing on a dedicated server between operational databases and the data marts.

data warehousing. Essentially, data warehousing involves off-loading operational data sources to target databases that will be used exclusively for decision support (reports and queries). There are a range of decision support environments, including duplicated database, enhanced analysis databases, and enterprise data warehouses.

database. A continuously updated collection of all information a system uses and stores. Databases make it possible to create, store, index, and cross-reference information online.

database driver. Software that connects an application to a specific database management system.

database server. A server that stores data. A database server does not have OneWorld logic.

DCE. See distributed computing environment.

DD. See data dictionary.

default. A code, number, or parameter value that is assumed when none is specified.

detail. The specific pieces of information and data that make up a record or transaction. Contrast with summary.

detail area. A control that is found in OneWorld applications and functions similarly to a spreadsheet grid for viewing, adding, or updating many rows of data at one time.

direct connect. A transaction method in which a client application communicates interactively and directly with a server application. See also batch-of-one immediate, store and forward.

director. An interactive utility that guides a user through the steps of a process to complete a task.

distributed computing environment (DCE). A set of integrated software services that allows software running on multiple computers to perform in a manner that is seamless and transparent to the end-users. DCE provides security, directory, time, remote procedure calls, and files across computers running on a network.

DLL. See dynamic link library.

DS. See data structure.

DSTR. See data structure.

duplicated database. A decision support database that contains a straightforward copy of operational data. The advantages involve improved performance for both operational and reporting environments. See also enhanced analysis database, enterprise data warehouse.

dynamic link library (DLL). A set of program modules that are designed to be invoked from executable files when the executable files are run, without having to be linked to the executable files. They typically contain commonly used functions.

dynamic partitioning. The ability to dynamically distribute logic or data to multiple tiers in a client/server architecture.

embedded event rule. An event rule that is specific to a particular table or application. Examples include form-to-form calls, hiding a field based on a processing option value, and calling a business function. Contrast with business function event rule. See also event rule.

employee work center. This is a central location for sending and receiving all OneWorld messages (system and user generated) regardless of the originating application or user. Each user has a mailbox that contains workflow and other messages, including Active Messages. With respect to workflow, the Message Center is MAPI compliant and supports drag and drop work reassignment, escalation, forward and reply, and workflow monitoring. All messages from the message center can be viewed through OneWorld messages or Microsoft Exchange.

encapsulation. The ability to confine access to and manipulation of data within an object to the procedures that contribute to the definition of that object.

enhanced analysis database. A database containing a subset of operational data. The data on the enhanced analysis database performs calculations and provides summary data to speed generation of reports and query response times. This solution is appropriate when external data must be added to source data, or when historical data is necessary for trend analysis or regulatory reporting. See also duplicated database, enterprise data warehouse.

enterprise data warehouse. A complex solution that involves data from many areas of the enterprise. This environment requires a large relational database (the data warehouse) that is a central repository of enterprise data, which is clean, reconciled, and consolidated. From this repository, data marts retrieve data to provide department-level decisions. See also duplicated database, enhanced analysis database.

enterprise server. A database server and logic server. See database server. Also referred to as host.

ER. See event rule.

ERP. See enterprise resource planning.

event. An action that occurs when an interactive or batch application is running. Example events are tabbing out of an edit control, clicking a push button, initializing a form, or performing a page break on a report. The GUI operating system uses miniprograms to manage user activities within a form. Additional logic can be attached to these miniprograms and used to give greater functionality to any event within a OneWorld application or report using event rules.

event rule. Used to create complex business logic without the difficult syntax that comes with many programming languages. These logic statements can be attached to applications or database events and are executed when the defined event occurs, such as entering a form, selecting a menu bar option, page breaking on a report, or selecting a record. An event rule can validate data, send a message to a user, call a business function, as well as many other actions. There are two types of event rules:

1 Embedded event rules.
2 Named event rules.

executable file. A computer program that can be run from the computer's operating system. Equivalent terms are "application" and "program.".

exit. 1) To interrupt or leave a computer program by pressing a specific key or a sequence of keys. 2) An option or function key displayed on a form that allows you to access another form.

facility. 1) A separate entity within a business for which you want to track costs. For example, a facility might be a warehouse location, job, project, work center, or branch/plant. Sometimes referred to as a business unit. 2) In Home Builder and ECS, a facility is a collection of computer language statements or programs that provide a specialized function throughout a system or throughout all integrated systems. For example, DREAM Writer and FASTR are facilities.

FDA. See Form Design Aid.

find/browse. A type of form used to:

1 Search, view, and select multiple records in a detail area.
2 Delete records.
3 Exit to another form.
4 Serve as an entry point for most applications.

firewall. A set of technologies that allows an enterprise to test, filter, and route all incoming messages. Firewalls are used to keep an enterprise secure.

fix/inspect. A type of form used to view, add, or modify existing records. A fix/inspect form has no detail area.

form. An element of OneWorld's graphical user interface that contains controls by which a user can interact with an application. Forms allow the user to input, select, and view information. A OneWorld application might contain multiple forms. In Microsoft Windows terminology, a form is known as a dialog box.

Form Design Aid (FDA). The OneWorld GUI development tool for building interactive applications and forms.

form interconnection. Allows one form to access and pass data to another form. Form interconnections can be attached to any event; however, they are normally used when a button is clicked.

form type. The following form types are available in OneWorld:

1 Find/browse.
2 Fix/inspect.
3 Header detail.
4 Headerless detail.
5 Message.
6 Parent/child.
7 Search/select.

fourth generation language (4GL). A programming language that focuses on what you need to do and then determines how to do it. Structured Query Language is an example of a 4GL.

graphical user interface (GUI). A computer interface that is graphically based as opposed to being character-based. An example of a character-based interface is that of the AS/400. An example of a GUI is Microsoft Windows. Graphically based interfaces allow pictures and other graphic images to be used in order to give people clues on how to operate the computer.

grid. See detail area.

GUI. See graphical user interface.

header. Information at the beginning of a table or form. This information is used to identify or provide control information for the group of records that follows.

header/detail. A type of form used to add, modify, or delete records from two different tables. The tables usually have a parent/child relationship.

headerless detail. A type of form used to work with multiple records in a detail area. The detail area is capable of of receiving input.

hidden selections. Menu selections you cannot see until you enter HS in a menu's Selection field. Although you cannot see these selections, they are available from any menu. They include such items as Display Submitted Jobs (33), Display User Job Queue (42), and Display User Print Queue (43). The Hidden Selections window displays three categories of selections: user tools, operator tools, and programmer tools.

host. In the centralized computer model, a large timesharing computer system that terminals communicate with and rely on for processing. In contrasts with client/server in that those users work at computers that perform much of their own processing and access servers that provide services such as file management, security, and printer management.

HTML. See hypertext markup language.

hypertext markup language. A markup language used to specify the logical structure of a document rather than the physical layout. Specifying logical structure makes any HTML document platform independent. You can view an HTML document on any desktop capable of supporting a browser. HTML can include active links to other HTML documents anywhere on the Internet or on intranet sites.

index. Represents both an ordering of values and a uniqueness of values that provide efficient access to data in rows of a table. An index is made up of one or more columns in the table.

inheritance. The ability of a class to recieve all or parts of the data and procedure definitions from a parent class. Inheritance enhances developement through the reuse of classes and their related code.

install system code. See system code.

integrated toolset. Unique to OneWorld is an industrial-strength toolset embedded in the already comprehensive business applications. This toolset is the same toolset used by J.D. Edwards to build OneWorld interactive and batch applications. Much more than a development environment, however, the OneWorld integrated toolset handles reporting and other batch processes, change management, and basic data warehousing facilities.

interactive processing. Processing actions that occur in response to commands you enter directly into the system. During interactive processing, you are in direct communication with the system, and it might prompt you for additional information while processing your request. See also online. Contrast with batch processing.

interface. A link between two or more computer systems that allows these systems to send information to and receive information from one another.

Internet. The worldwide constellation of servers, applications, and information available to a desktop client through a phone line or other type of remote access.

interoperability. The ability of different computer systems, networks, operating systems, and applications to work together and share information.

intranet. A small version of the Internet usually confined to one company or organization. An intranet uses the functionality of the Internet and places it at the disposal of a single enterprise.

IP. A connection-less communication protocol that by itself provides a datagram service. Datagrams are self-contained packets of information that are forwarded by routers based on their address and the routing table information contained in the routers. Every node on a TCP/IP network requires an address that identifies both a network and a local host or node on the network. In most cases the network administrator sets up these addresses when installing new workstations. In some cases, however, it is possible for a workstation, when booting up, to query a server for a dynamically assigned address.

IServer Service. Developed by J.D. Edwards, this internet server service resides on the web server, and is used to speed up delivery of the Java class files from the database to the client.

ISO 9000. A series of standards established by the International Organization for Standardization, designed as a measure of product and service quality.

J.D. Edwards Database. See JDEBASE Database Middleware.

Java. An Internet executable language that, like C, is designed to be highly portable across platforms. This programming language was developed by Sun Microsystems. Applets, or Java applications, can be accessed from a web browser and executed at the client, provided that the operating system or browser is Java-enabled. (Java is often described as a scaled-down C++). Java applications are platform independent.

Java Database Connectivity (JDBC). The standard way to access Java databases, set by Sun Microsystems. This standard allows you to use any JDBC driver database.

JavaScript. A scripting language related to Java. Unlike Java, however, JavaScript is not an object-oriented language and it is not compiled.

jde.ini. J.D. Edwards file (or member for AS/400) that provides the runtime settings required for OneWorld initialization. Specific versions of the file/member must reside on every machine running OneWorld. This includes workstations and servers.

JDEBASE Database Middleware. J.D. Edwards proprietary database middleware package that provides two primary benefits:

1. Platform-independent APIs for multidatabase access. These APIs are used in two ways:
   a. By the interactive and batch engines to dynamically generate platform-specific SQL, depending on the datasource request.
   b. As open APIs for advanced C business function writing. These APIs are then used by the engines to dynamically generate platform-specific SQL.
2. Client-to-server and server-to-server database access. To accomplish this OneWorld is integrated with a variety of third-party database drivers, such as Client Access 400 and open database connectivity (ODBC).

JDECallObject. An application programming interface used by business functions to invoke other business functions.

JDENET. J.D. Edwards proprietary middleware software. JDENET is a messaging software package.

JDENET communications middleware. J.D. Edwards proprietary communications middleware package for OneWorld. It is a peer-to-peer, message-based, socket based, multiprocess communications middleware solution. It handles client-to-server and server-to-server communications for all OneWorld supported platforms.

job queue. A group of jobs waiting to be batch processed. See also batch processing.

just in time installation (JITI). OneWorld's method of dynamically replicating objects from the central object location to a workstation.

just in time replication (JITR). OneWorld's method of replicating data to individual workstations. OneWorld replicates new records (inserts) only at the time the user needs the data. Changes, deletes, and updates must be replicated using Pull Replication.

KEY. A column or combination of columns that identify one or more records in a database table.

leading zeros. A series of zeros that certain facilities in J.D. Edwards systems place in front of a value you enter. This normally occurs when you enter a value that is smaller than the specified length of the field. For example, if you enter 4567 in a field that accommodates eight numbers, the facility places four zeros in front of the four numbers you enter. The result appears as: 00004567.

level of detail. 1) The degree of difficulty of a menu in J.D. Edwards software. The levels of detail for menus are as follows:

A	Major Product Directories.
B	Product Groups.
1	Basic Operations.
2	Intermediate Operations.
3	Advanced Operations.
4	Computer Operations.
5	Programmers.
6	Advanced Programmers Also known as menu levels.

2) The degree to which account information in the General Accounting system is summarized. The highest level of detail is 1 (least detailed) and the lowest level of detail is 9 (most detailed).

MAPI. See Messaging Application Programming Interface.

master table. A database table used to store data and information that is permanent and necessary to the system's operation. Master tables might contain data such as paid tax amounts, supplier names, addresses, employee information, and job information.

menu. A menu that displays numbered selections. Each of these selections represents a program or another menu. To access a selection from a menu, type the selection number and then press Enter.

menu levels. See level of detail.

menu masking. A security feature of J.D. Edwards systems that lets you prevent individual users from accessing specified menus or menu selections. The system does not display the menus or menu selections to unauthorized users.

Messaging Application Programming Interface (MAPI). An architecture that defines the components of a messaging system and how they behave. It also defines the interface between the messaging system and the components.

middleware. A general term that covers all the distributed software needed to support interactions between clients and servers. Think of it as the software that's in the middle of the client/server system or the "glue" that lets the client obtain a service from a server.

modal. A restrictive or limiting interaction created by a given condition of operation. Modal often describes a secondary window that restricts a user's interaction with other windows. A secondary window can be modal with respect to it's primary window or to the entire system. A modal dialog box must be closed by the user before the application continues.

mode. In reference to forms in OneWorld, mode has two meanings:

- An operational qualifier that governs how the form interacts with tables and business views. OneWorld form modes are: add, copy, and update.
- An arbitrary setting that aids in organizing form generation for different environments. For example, you might set forms generated for a Windows environment to mode 1 and forms generated for a Web environment to mode 2.

modeless. Not restricting or limiting interaction. Modeless often describes a secondary window that does not restrict a user's interaction with other windows. A modeless dialog box stays on the screen and is available for use at any time but also permits other user activities.

multitier architecture. A client/server architecture that allows multiple levels of processing. A tier defines the number of computers that can be used to complete some defined task.

named event rule. Encapsulated, reusable business logic created using through event rules rather than C programming. Contrast with embedded event rule. See also event rule.

NER. See named event rule.

network computer. As opposed to the personal computer, the network computer offers (in theory) lower cost of purchase and ownership and less complexity. Basically, it is a scaled-down PC (very little memory or disk space) that can be used to access network-based applications (Java applets, ActiveX controls) via a network browser.

network computing. Often referred to as the next phase of computing after client/server. While its exact definition remains obscure, it generally encompasses issues such as transparent access to computing resources, browser-style front-ends, platform independence, and other similar concepts.

next numbers. A feature you use to control the automatic numbering of such items as new G/L accounts, vouchers, and addresses. It lets you specify a numbering system and provides a method to increment numbers to reduce transposition and typing errors.

non–object librarian object. An object that is not managed by the object librarian.

numeric character. Digits 0 through 9 that are used to represent data. Contrast with alphanumeric characters.

object. A self-sufficient entity that contains data as well as the structures and functions used to manipulate the data. For OneWorld purposes, an object is a reusable entity that is based on software specifications created by the OneWorld toolset. See also object librarian.

object configuration manager (OCM). OneWorld's Object Request Broker and the control center for the runtime environment. It keeps track of the runtime locations for business functions, data, and batch applications. When one of these objects is called, the Object Configuration Manager directs access to it using defaults and overrides for a given environment and user.

object embedding. When an object is embedded in another document, an association is maintained between the object and the application that created it; however, any changes made to the object are also only kept in the compound document. See also object linking.

object librarian. A repository of all versions, applications, and business functions reusable in building applications. You access these objects with the Object Management Workbench.

object librarian object. An object managed by the object librarian.

object linking. When an object is linked to another document, a reference is created with the file the object is stored in, as well as with the application that created it. When the object is modified, either from the compound document or directly through the file it is saved in, the change is reflected in that application as well as anywhere it has been linked. See also object embedding.

object linking and embedding (OLE). A way to integrate objects from diverse applications, such as graphics, charts, spreadsheets, text, or an audio clip from a sound program. See also object embedding, object linking.

object management workbench (OMW). An application that provides check-out and check-in capabilities for developers, and aids in the creation, modification, and use of OneWorld Objects. The OMW supports multiple environments (such as production and development).

object-based technology (OBT). A technology that supports some of the main principles of object-oriented technology: classes, polymorphism, inheritance, or encapsulation.

object-oriented technology (OOT). Brings software development past procedural programming into a world of reusable programming that simplifies development of applications. Object orientation is based on the following principles: classes, polymorphism, inheritance, and encapsulation.

OCM. See object configuration manager.

ODBC. See open database connectivity.

OLE. See object linking and embedding.

OMW. Object Management Workbench.

OneWorld. A combined suite of comprehensive, mission-critical business applications and an embedded toolset for configuring those applications to unique business and technology requirements. OneWorld is built on the Configurable Network Computing technology- J.D. Edwards' own application architecture, which extends client/server functionality to new levels of configurability, adaptability, and stability.

OneWorld application. Interactive or batch processes that execute the business functionality of OneWorld. They consist of reusable business functions and associated data that are platform independent and can be dynamically configured across a TCP/IP network.

OneWorld object. A reusable piece of code that is used to build applications. Object types include tables, forms, business functions, data dictionary items, batch processes, business views, event rules, versions, data structures, and media objects. See also object.

OneWorld process. Allows OneWorld clients and servers to handle processing requests and execute transactions. A client runs one process, and servers can have multiple instances. OneWorld processes can also be dedicated to specific tasks (for example, workflow messages and data replication) to ensure that critical processes don't have to wait if the server is particularly busy.

OneWorld Web development computer. A standard OneWorld Windows developer computer with the additional components installed:

- JFC (0.5.1).
- Generator Package with Generator.Java and JDECOM.dll.
- R2 with interpretive and apllication controls/form.

online. Computer functions over which the system has continuous control. Users are online with the system when working with J.D. Edwards system provided forms.

open database connectivity (ODBC). Defines a standard interface for different technologies to process data between applications and different data sources. The ODBC interface is made up of a set of function calls, methods of connectivity, and representation of data types that define access to data sources.

open systems interconnection (OSI). The OSI model was developed by the International Standards Organization (ISO) in the early 1980s. It defines protocols and standards for the interconnection of computers and network equipment.

operand. See Boolean Logic Operand.

output. Information that the computer transfers from internal storage to an external device, such as a printer or a computer form.

output queue. See print queue.

package. OneWorld objects are installed to workstations in packages from the deployment server. A package can be compared to a bill of material or kit that indicates the necessary objects for that workstation and where on the deployment server the install program can find them. It is a point-in-time "snap shot" of the central objects on the deployment server.

package location. The directory structure location for the package and it's set of replicated objects. This is usually \\deployment server\release\path_code\package\ package name. The sub-directories under this path are where the replicated objects for the package will be placed. This is also referred to as where the package is built or stored.

parameter. A number, code, or character string you specify in association with a command or program. The computer uses parameters as additional input or to control the actions of the command or program.

parent/child form. A type of form that presents parent/child relationships in an application on one form. The left portion of the form presents a tree view that displays a visual representation of a parent/child relationship. The right portion of the form displays a detail area in browse mode. The detail area displays the records for the child item in the tree. The parent/child form supports drag and drop functionality.

partitioning. A technique for distributing data to local and remote sites to place data closer to the users who access. Portions of data can be copied to different database management systems.

path code. A pointer to a specific set of objects. A path code is used to locate:

1. Central Objects.
2. Replicated Objects.

platform independence. A benefit of open systems and Configurable Network Computing. Applications that are composed of a single code base can be run across a TCP/IP network consisting of various server platforms and SQL databases.

polymorphism. A principle of object-oriented technology in which a single mnemonic name can be used to perform similar operations on software objects of different types.

portability. Allows the same application to run on different operating systems and hardware platforms.

portal. A configurable Web object that provides information and links to the Web. Portals can be used as home pages and are typically used in conjunction with a Web browser.

primary key. A column or combination of columns that uniquely identifies each row in a table.

print queue. A list of tables, such as reports, that you have submitted to be written to an output device, such as a printer. The computer spools the tables until it writes them. After the computer writes the table, the system removes the table identifier from the list.

processing option. A feature of the J.D. Edwards reporting system that allows you to supply parameters to direct the functions of a program. For example, processing options allow you to specify defaults for certain form displays, control the format in which information prints on reports, change how a form displays information, and enter beginning dates.

program temporary fix (PTF). A representation of changes to J.D. Edwards software that your organization receives on magnetic tapes or diskettes.

project. An Object Management Workbench object used to organize objects in development.

published table. Also called a "Master" table, this is the central copy to be replicated to other machines. Resides on the "Publisher" machine. the Data Replication Publisher Table (F98DRPUB) identifies all of the Published Tables and their associated Publishers in the enterprise.

publisher. The server that is responsible for the Published Table. The Data Replication Publisher Table (F98DRPUB) identifies all of the Published Tables and their associated Publishers in the enterprise.

pull replication. One of the OneWorld methods for replicating data to individual workstations. Such machines are set up as Pull Subscribers using OneWorld's data replication tools. The only time Pull Subscribers are notified of changes, updates, and deletions is when they request such information. The request is in the form of a message that is sent, usually at startup, from the Pull Subscriber to the server machine that stores the Data Replication Pending Change Notification table (F98DRPCN).

purge. The process of removing records or data from a system table.

QBE. See query by example.

query by example (QBE). Located at the top of a detail area, it is used to search for data to be displayed in the detail area.

redundancy. Storing exact copies of data in multiple databases.

regenerable. Source code for OneWorld business functions can be regenerated from specifications (business function names). Regeneration occurs whenever an application is recompiled, eitherfor a new platform or when new functionality is added.

relationship. Links tables together and facilitates joining business views for use in an application or report. Relationships are created based on indexes.

release/release update. A "release" contains major new functionality, and a "release update" contains an accumulation of fixes and performance enhancements, but no new functionality.

replicated object. A copy or replicated set of the central objects must reside on each client and server that run OneWorld. The path code indicates the directory the directory where these objects are located.

run. To cause the computer system to perform a routine, process a batch of transactions, or carry out computer program instructions.

SAR. See software action request.

scalability. Allows software, architecture, network, or hardware growth that will support software as it grows in size or resource requirements. The ability to reach higher levels of performance by adding microprocessors.

search/select. A type of form used to search for a value and return it to the calling field.

selection. Found on J.D. Edwards menus, selections represent functions that you can access from a menu. To make a selection, type the associated number in the Selection field and press Enter.

server. Provides the essential functions for furnishings services to network users (or clients) and provides management functions for network administrators. Some of these functions are storage of user programs and data and management functions for the file systems. It may not be possible for one server to support all users with the required services. Some examples of dedicated servers that handle specific tasks are backup and archive servers, application and database servers.

servlet. Servlets provide a Java-based solution used to address the problems currently associated with doing server-side programming, including inextensible scripting solutions. Servlets are objects that conform to a specific interface that can be plugged into a Java-based server. Servlets are to the server-side what applets are to the client-side.

software. The operating system and application programs that tell the computer how and what tasks to perform.

software action request (SAR). An entry in the AS/400 database used for requesting modifications to J.D. Edwards software.

special character. A symbol used to represent data. Some examples are *, &, #, and /. Contrast with alphanumeric character and numeric character.

specifications. A complete description of a OneWorld object. Each object has its own specification, or name, which is used to build applications.

Specs. See specifications.

spool. The function by which the system stores generated output to await printing and processing.

spooled table. A holding file for output data waiting to be printed or input data waiting to be processed.

SQL. See structured query language.

static text. Short, descriptive text that appears next to a control variable or field. When the variable or field is enabled, the static text is black; when the variable or field is disabled, the static text is gray.

store and forward. A transaction method that allows a client application to perform work and, at a later time, complete that work by connecting to a server application. This often involves uploading data residing on a client to a server.

structured query language (SQL). A fourth generation language used as an industry standard for relational database access. It can be used to create databases and to retrieve, add, modify, or deleta data from databases. SQL is not a complete programming language because it does not contain control flow logic.

subfile. See detail.

submit. See run.

subscriber. The server that is responsible for the replicated copy of a Published Table. Such servers are identified in the Subscriber Table.

subscriber table. The Subscriber Table (F98DRSUB), which is stored on the Publisher Server with the Data Replication Publisher Table (F98DRPUB) identifies all of the Subscriber machines for each Published Table.

subsystem job. Within OneWorld, subsystem jobs are batch processes that continually run independently of, but asynchronously with, OneWorld applications.

summary. The presentation of data or information in a cumulative or totaled manner in which most of the details have been removed. Many of the J.D. Edwards systems offer forms and reports that are summaries of the information stored in certain tables. Contrast with detail.

system. See application.

System Code. System codes are a numerical representation of J.D. Edwards and customer systems. For example, 01 is the system code for Address Book. System codes 55 through 59 are reserved for customer development by customers. Use system codes to categorize within OneWorld. For example, when establishing user defined codes (UDCs), you must include the system code the best categorizes it. When naming objects such as applications, tables, and menus, the second and third characters in the object's name is the system code for that object. For example, G04 is the main menu for Acounts Payable, and 04 is its system code.

system function. A program module, provided by OneWorld, available to applications and reports for further processing.

table. A two-dimensional entity made up of rows and columns. All physical data in a database are stored in tables. A row in a table contains a record of related information. An example would be a record in an Employee table containing the Name, Address, Phone Number, Age, and Salary of an employee. Name is an example of a column in the employee table.

table design aid (TDA). A OneWorld GUI tool for creating, modifying, copying, and printing database tables.

table event rules. Use table event rules to attach database triggers (or programs) that automatically run whenever an action occurs against the table. An action against a table is referred to as an event. When you create a OneWorld database trigger, you must first determine which event will activate the trigger. Then, use Event Rules Design to create the trigger. Although OneWorld allows event rules to be attached to application events, this functionality is application specific. Table event rules provide embedded logic at the table level.

TAM. Table Access Management.

TBLE. See table.

TC. Table conversion.

TCP/IP. Transmission Control Protocol/Internet Protocol. The original TCP protocol was developed as a way to interconnect networks using many different types of transmission methods. TCP provides a way to establish a connection between end systems for the reliable delivery of messages and data.

TCP/IP services port. Used by a particular server application to provide whatever service the server is designed to provide. The port number must be readily known so that an application programmer can request it by name.

TDA. See table design aid.

TER. See table event rules.

Terminal Identification. The workstation ID number.Terminal number of a specific terminal or IBM user ID of a particular person for whom this is a valid profile.Header Field: Use the Skip to Terminal/User ID field in the upper portion of the form as an inquiry field in which you can enter the number of a terminal or the IBM user ID of a specific person whose profile you want the system to display at the top of the list. When you first access this form, the system automatically enters the user ID of the person signed on to the system.Detail Field: The Terminal/User ID field in the lower portion of the form contains the user ID of the person whose profile appears on the same line.A code identifying the user or terminal for which you accessed this window.

third generation language (3GL). A programming language that requires detailed information about how to complete a task. Examples of 3GLs are COBOL, C, Pascal and FORTRAN.

token. A referent to an object used to determine ownership of that object and to prevent non-owners from checking the object out in Object Management Workbench. An object holds its own token until the object is checked out, at which time the object passes its token to the project in which the object is placed.

trigger. Allow you to attach default processing to a data item in the data dictionary. When that data item is used on an application or report, the trigger is invoked by an event associated with the data item. OneWorld also has three visual assist triggers: calculator, calendar and search form.

UBE. Universal batch engine.

UDC Edit Control. Use a User-Defined Code (UDC) Edit Control for a field that accepts only specific values defined in a UDC table. Associate a UDC edit control with a database item or dictionary item. The visual assist Flashlight automatically appears adjacent to the UDC edit control field. When you click on the visual assist Flashlight, the attached search and select form displays valid values for the field. To create a UDC Edit Control, you must:

- Associate the data item with a specific UDC table in the Data Dictionary.
- Create a search and select form for displaying valid values from the UDC table.

uniform resource identifier (URI). A character string that references an internet object by name or location. A URL is a type of URI.

uniform resource locator (URL). Names the address (location) of a document on the Internet or an intranet. A URL includes the document's protocol and server name. The path to the document might be included as well. The following is an example of a URL: http://www.jdedwards.com. This is J.D. Edwards Internet address.

URI. See uniform resource identifier.

URL. See uniform resource locator.

user defined code (type). The identifier for a table of codes with a meaning you define for the system, such as ST for the Search Type codes table in Address Book. J.D. Edwards systems provide a number of these tables and allow you to create and define tables of your own. User defined codes were formerly known as descriptive titles.

user defined codes (UDC). Codes within software that users can define, relate to code descriptions, and assign valid values. Sometimes user defined codes are referred to as a generic code table. Examples of such codes are unit-of-measure codes, state names, and employee type codes.

UTB. Universal Table Browser.

valid codes. The allowed codes, amounts, or types of data that you can enter in a field. The system verifies the information you enter against the list of valid codes.

visual assist. Forms that can be invoked from a control to assist the user in determining what data belongs in the control.

vocabulary overrides. A feature you can use to override field, row, or column title text on forms and reports.

wchar_t. Internal type of a wide character. Used for writing portable programs for international markets.

web client. Any workstation that contains an internet browser. The web client communicates with the web server for OneWorld data.

web server. Any workstation that contains the IServer service, SQL server, Java menus and applications, and Internet middleware. The web server receives data from the web client, and passes the request to the enterprise server. When the enterprise server processes the information, it sends it back to the web server, and the web server sends it back to the web client.

WF. See workflow.

window. See form.

workflow. According to the Workflow Management Coalition, worlflow means "the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.".

workgroup server. A remote database server usually containing subsets of data replicated from a master database server. This server does not performance an application or batch processing. It may or may not have OneWorld running (in order to replicate data).

workspace. In the ActivEra Portal, the main section of the Portal. A user might have access to several workspaces, each one configured differently and containing its own components.

worldwide web. A part of the Internet that can transmit text, graphics, audio, and video. The

World Wide Web allows clients to launch local or remote applications.

z file. For store and forward (network disconnected) user, OneWorld store and forward applications perform edits on static data and other critical information that must be valid to process an order. After the initial edits are complete, OneWorld stores the transactions in work tables on the workstation. These work table are called Z files. When a network connection is established, Z files are uploaded to the enterprise server and the transactions are edited again by a master business function. The master business function will then update the records in your transaction files.

Index