PeopleSoft.

EnterpriseOne JDE5
Foundation
PeopleBook

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EnterpriseOne JDE5
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J.D. Edwards Software Overview

J.D. Edwards software provides a flexible, configurable solution in the face of constantly changing technology and enterprise practices. J.D. Edwards software is the first network-centric software that separates business rules from the underlying technology. With J.D. Edwards software, as new technologies emerge, you can easily add them to the framework of your enterprise.

J.D. Edwards Software Features

J.D. Edwards software offers the following features:

- Multiplatform computing. J.D. Edwards software has the ability to run on different platforms. This versatility allows for easy maintenance of information across a network.

- Integrated supply chain. J.D. Edwards software provides the ability to use the Internet and an intranet to allow you to communicate and share information with your employees, customers, and suppliers.

- Interoperability. J.D. Edwards software lets you leverage your existing investments in hardware, databases, and software, and integrate them with legacy and third-party products.

- Adaptability. J.D. Edwards software adapts easily to different languages, currencies, reporting provisions, and technology standards.

- User-friendly. J.D. Edwards software lets you point and click, drag and drop, and use fill-in-the-blank forms to easily complete your tasks.

System Integration

J.D. Edwards software combines enterprise applications with an integrated toolset to tailor those applications to the needs of your business.

J.D. Edwards refers to each group of its software products as an *application suite*. The application suites support manufacturing, financials, distribution or logistics, and human resource operations for multisite and multinational organizations. Your business needs determine what application suites are installed for your enterprise system. For complex business situations, you might use several application suites to achieve a comprehensive solution.

Each application suite is made up of *systems*. For example, the Financial Suite contains systems such as Accounts Receivable - System 03B, Accounts Payable - System 04, General Accounting - System 09, Fixed Assets - System 12, and others. Each system consists of applications, forms, reports, and database tables that are designed to handle specific business needs.

Because the functions and features of all the systems are similar and integrated, you are not necessarily aware of moving from one system to another when working with various applications. The following illustration shows data and logic that is shared between applications such as Sales Order Detail File, Customer Ledger, and Account Ledger. The illustration shows how a sales order entry application shares customer data, such as balances and total order amounts, with an accounts receivable (A/R) application. As orders are taken, the sales order application passes the information over to the A/R application, which then posts the entries to the general ledger. Also, the order entry application can request credit checks from the A/R application.

```
                          Sales Order
                          Detail File
                           (F4211)

                         ┌────────┐
                         └────────┘

            ┌──────────────┘    └──────────────┐
            │                                  │
        ┌────────┐                         ┌────────┐                    Database
1. Credit check                    2. Adjust customer
        └────────┘                    balance  └────────┘            ┌──────────┐
            │                                  │                     │          │
            └──────────────┐    ┌──────────────┘                     │          │
                           │    │                                    │          │
     Customer           ┌────────┐                                   │          │
      Ledger            └────────┘───────────────────────────────────▶│          │
     (F03B11)              │                                          │          │
                          │                                          │          │
                   ┌────────┐                                        │          │
3. Post to Account │        │                                        └──────────┘
    Ledger         └────────┘
                          │
                          ▼
     Account         ┌────────┐
Ledger (F0911)       └────────┘
```
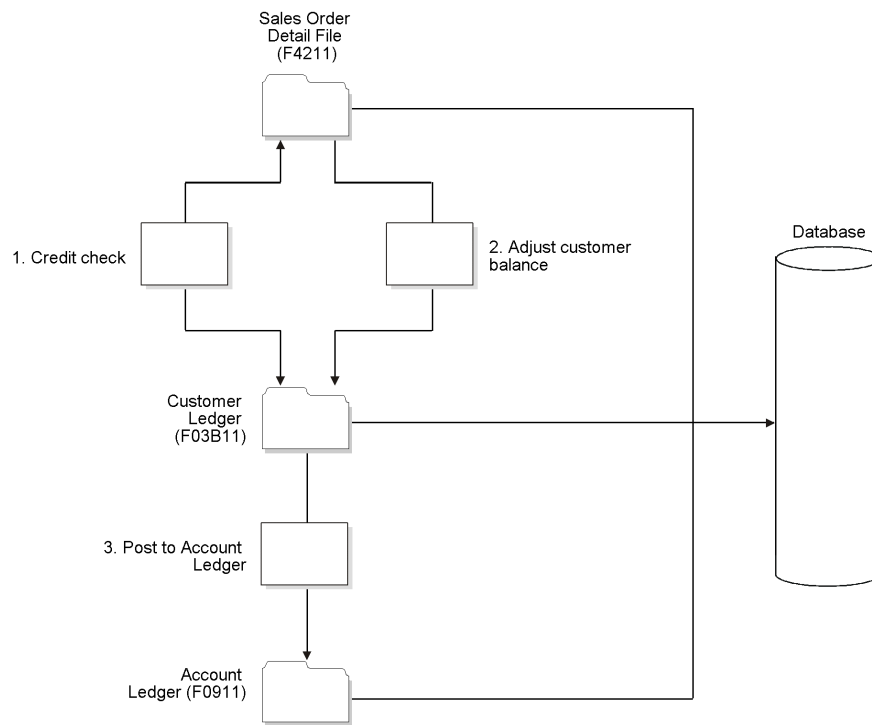
This guide often refers to Address Book - System 01 to illustrate the foundational concepts of J.D. Edwards software. Address Book, an online version of a traditional card file, is a database of names, addresses, and phone numbers that:

- Provides easy access to all addresses for searching and reporting purposes

- Reduces the need for duplication of records

- Provides security through Business Unit assignment or Search Type authorization

- Interfaces with other J.D. Edwards software systems

Because it is fundamental to business solutions, Address Book provides a realistic subject for learning the foundational concepts of J.D. Edwards software. Many of the tasks that you perform use Address Book examples.

Address Book interfaces include, but are not limited to, the following systems:

General
Ledger

Job Cost

Distribution

**Address
Book**

Customers

Suppliers

Manufacturing

Employees

Payroll/
Human
Resources

Jobs

Tenants

Property
Management

Accounts
Payable

Accounts
Receivable
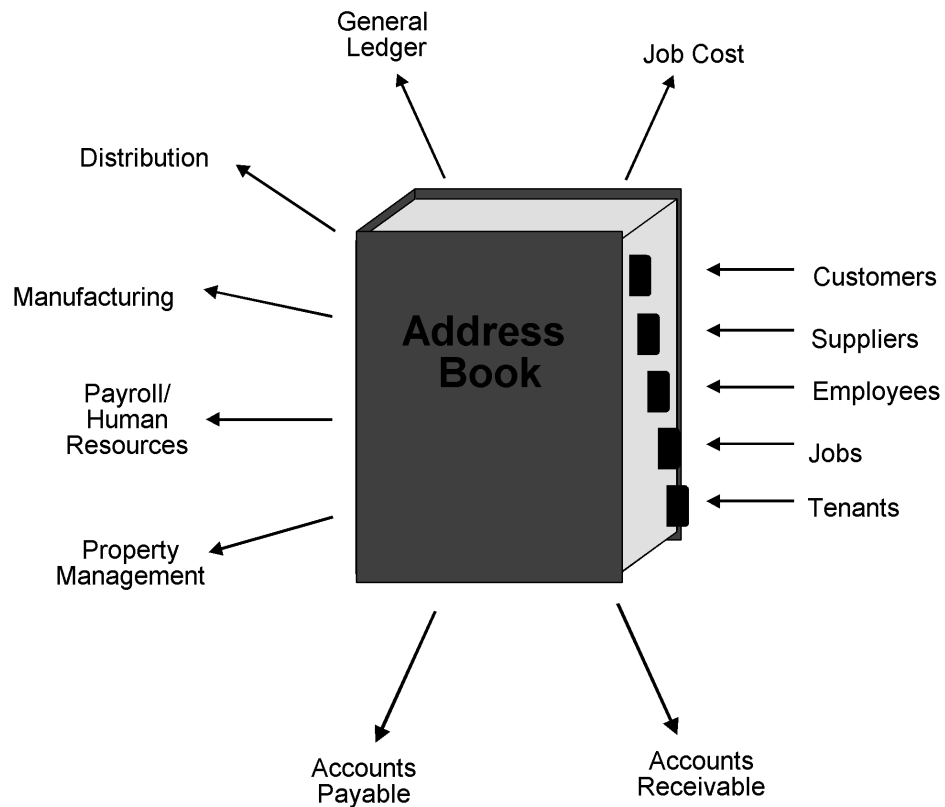
See Also

- *J.D. Edwards Software Systems* for a list of systems and their associated codes

Foundation Overview

The *Foundation* documentation introduces you to the integrated environment of J.D. Edwards software. Through overviews, illustrations, procedures, and examples, *Foundation* describes the operations and functions that are common to all applications. *Foundation* comprises the following topics:

J.D. Edwards Software Access	Learn about the different applications that can each be used as an entry point for accessing J.D. Edwards tools and applications.
Application User Interface	Learn about the operating environment, including menus, forms, and the grid.
User Overrides	Learn to change the appearance of an application to fit the needs of your business.
Records	Learn how to locate, add, and work with database records, add objects, and format and move around on a record-entry form.
Messages and Queues	Learn to use Work Center to send, receive, and work with messages from J.D. Edwards users and recipients outside of the J.D. Edwards software environment.

Media Object Attachments	Learn how to attach objects (text, images, OLE objects, and J.D. Edwards application shortcuts) to rows and forms.
MailMerge Workbench	Learn about merging J.D. Edwards system records with third-party word processing documents for automatic creation of form letters by using certain application workflows.
Interactive Versions for Applications	Learn to modify the behavior of applications through changes to processing options and interactive version detail.
Batch Versions for Reports	Learn how to create, modify, and print your own report versions.
Processing Options	Learn key functions, types, and how to access and use processing options.
Menu Word Search	Learn how to find and open J.D. Edwards menus and applications, and customize search lists.
User Defined Codes	Learn how to tailor valid values for a field to meet your business needs.
Configurable Network Computing Foundation	Learn some key concepts and fundamentals about the technical architecture that makes J.D. Edwards software possible.

J.D. Edwards Software Access

J.D. Edwards software provides several different applications, each of which can be used as an entry point for accessing other J.D. Edwards tools and applications. The following table summarizes the difference between these applications:

Solution Explorer	A Windows-based explorer that provides the ability to navigate menus and launch Windows versions of J.D. Edwards applications. It also provides tools for quickly implementing J.D. Edwards software and making changes after implementation. See *Solution Explorer* for more information about this application.
J.D. Edwards Explorer - Windows	A Windows-based explorer provided with J.D. Edwards software. See *J.D. Edwards Explorer - Windows* for more information about this application.
J.D. Edwards Portal	A fully configurable Web-based portal. The J.D. Edwards Portal requires a J.D. Edwards web server, and it also can launch an HTML version of J.D. Edwards applications. See *J.D. Edwards Portal* for more information about this application.
J.D. Edwards Web Client	An HTML-based menu system that provides the ability to navigate J.D. Edwards software menus and launch an HTML version of J.D. Edwards applications. See *J.D. Edwards Web Client* for more information about this application.
J.D. Edwards Java	A Java-based menu system that provides the ability to navigate J.D. Edwards software menus and launch Java versions of J.D. Edwards applications. See *J.D. Edwards Java* for more information about this application.

Solution Explorer

Solution Explorer is a collection of tools and technologies that provides a gateway to J.D. Edwards enterprise software and enables organizations to easily adapt their enterprise software both before and after implementation to meet changing business conditions.

Key attributes that distinguish Solution Explorer from other Enterprise Resource Planning (ERP) systems include:

- Ease of navigation. The Solution Explorer offers a convenient, web-browser-based, customizable gateway to all features and to any internal or external Web site. You can create and use links between and within task views to further speed your navigation and shorten your work time. Find It! allows you to quickly search for the programs that you need.

- Flexibility. Reusable units of work called tasks are at the core of the Solution Explorer. You can use these tasks as building blocks to model and create business and technical processes. These processes can be modified without costly changes to the system.

- Configurability. You 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 Explorer allows you to create special tasks called activators, which you use to build key business and technical processes without having to hard-code any form interconnections. Activators launch the Universal Director, which provides an interface for the entire process that you create. The Universal Director also facilitates the passing of data between forms. In addition, the Universal Director presents process steps in an easy-to-read format.

- Compatibility. Solution Explorer's architecture permits software developers and integration partners to produce custom activators that are compatible with both third-party software applications and J.D. Edwards software.

- Accountability. Documentation exists for most tasks in Solution Explorer, 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 Explorer allows you to quickly transform your business ideas into action. Not only does Solution Explorer provide your business with the power to build a highly customized, fully integrated enterprise solution, but Solution Explorer also allows the system to be altered smoothly as business conditions warrant change in a rapidly evolving world.

Working with Solution Explorer

Solution Explorer is the gateway to J.D. Edwards software applications, reports, menus, and external objects such as related documents and spreadsheets. You access these items using different task views provided by the Solution Explorer. Task views contain menus composed of these various items. Different task views only display specific items arranged in their menus and based on varying criteria. Depending on what you want to do, you select the task view that best supports your task. The Solution Explorer also offers access to the Internet or an intranet through its web browser.

Solution Explorer offers the ability to change user and display options, and to open menus by various methods.

Understanding the Solution Explorer Interface

The overall appearance of the Solution Explorer can vary dramatically depending on whether you are using the web browser, working with a task view, or displaying or hiding certain features. However, some features of the Explorer interface are available at all times, such as the menu bar. Additionally, other features, such as the Toolbar and the status bar, remain constant in how you can interact with them, although you have the option of turning them on and off.

Windows and Forms

Depending on how you interact with the Solution Explorer, it can display several panels of information. These panels are referred to as windows. For example, you might display a task view, choose to display task properties and documentation, and then use Find It! to open a menu. Your task view, the task properties, the menu displayed by Find It!, and the documentation each appears in its own window.

The task view window cannot be closed.

Menu Bar

Within the Solution Explorer, the word "menu" is used in two different ways. A menu can be a drop-down list or a pop-up list of options. This type of menu is common to Windows applications. In the Explorer, a menu can also be a tree-structured list of J.D. Edwards software tasks, such as applications and reports. Menus of this type are available only in task views.

The menu bar at the top of the Explorer provides pull-down menus that display options for a task view, a menu, or an application. Some of the menus that you can access from the menu bar are File, Edit, and View.

To choose menu options, either use your mouse to click an option or use the keyboard. Whenever a single, underlined letter appears in an option, you can press the Alt key plus the key that corresponds to the underlined letter to access the option. For example, the letter F is underlined in the word File on the menu bar so that you can access the File pull-down menu with your keyboard by holding down the Alt key and pressing the F key.

The following list describes each menu option found on the menu bar. Depending on how your system administrator has configured your account, your ability to access some menu options might vary from what is described here.

File   Use this option to access printer controls and to exit the system.

Edit   Use this option to create shortcuts and define prompting options when available.

View   Use this option to access the web browser, turn toolbars on and off, access task views, and access a menu for changing user preferences.

Tools   Use this option to access the following:

- Find It!
- Work Center
- Object Management Workbench
- Report Design and Report Versions

- Calendar
- Calculator

Applications Use this option to access a list of all J.D. Edwards applications that are currently open.

Help Use this option to access online help.

Solution Explorer Toolbars

The Toolbars provide shortcuts for accessing frequently used commands. The Toolbar buttons vary, depending on whether you are using the Web browser, a task view, the Find It! utility, and so on. Because your system administrator can configure the Toolbar, the buttons on the Toolbar might vary from those described in this section. The Toolbar appears at the top of the window, directly beneath the window's banner. If more than one window is displayed, each window has its own Toolbar, if applicable (not all windows have Toolbars).

To toggle the Toolbar on and off, choose Show from the View menu and then choose Toolbar. To toggle text descriptions on and off under each button, choose Show from the View menu and then choose Toolbar Text.

When you move the cursor over a button, the button is highlighted, and the system provides a brief Hover Help description in a yellow box below your cursor.

The following list provides information about the functions available on the various Toolbars. Keep in mind that most Toolbars do not provide all of the functions on the list.

Back button The Back button displays the previous Web page.

Edit button The Edit button allows you to add or change the documentation for a task.

Find It! button The Find It! button launches a program that performs a search of J.D. Edwards software items based on the criteria that you entered.

Font down button The Font down button decreases the size of the text that appears in the documentation window.

Font up button The Font up button increases the size of the text that appears in the documentation window.

Forward button The Forward button displays the next Web page in the queue.

Go button The Go button displays the Web page at the address that you enter in the field next to the button.

Home button The Home button displays the Web page that your system administrator has configured to be your home page. This page might not be the same as the Solution Explorer Home Page.

Idea to Action button The Idea To Action button launches the selected task.

Internet button The Internet button displays the most recently accessed Web browser location. To access the Solution Explorer Home Page, click the Internet button twice.

Link button	The Link button launches the linked task in a second window.
New Search button	The New Search button clears all of the fields in Find It! so that you can perform a new search based on different criteria.
Print button	The Print button is located on the toolbar of the Web browser and the Task Documentation windows. Click the Print button to print the current contents of the Web browser or Task documentation window to your default printer.
Refresh button	The Refresh button updates the information in the window that you are viewing. In the Web browser, the Refresh button reloads the current Web page. In a Task view, the Refresh button updates the Explorer with any changes made to your menus. In the Task Documentation window, the Refresh button updates the documentation window to reflect any changes made to the documentation.
Search button	The Search button accesses a Web site determined by your system administrator.
Stop button	The Stop button halts the system's efforts to load a Web page.
Task View button	The Task View button displays the most recently accessed task view. To choose a specific task view, click the down arrow next to the Task View button, and then click a selection from the drop-down menu.

Status Bar

The Status Bar offers quick information about the meaning of a function, the security for your system, and the OneWorld environment in which you are operating. Typically, it appears at the bottom of the Explorer screen.

To display the Status Bar, select Show from the View menu, and then click Status Bar.

Hovering your cursor over the Status Bar components activates hover help for each item.

The following information appears on the Solution Explorer status bar:

- A description of a highlighted menu bar item
- Error messages
- A message that contains the status of ongoing processes in OneWorld
- Solution Explorer copyright information
- Fields that notify you whether Caps Lock, Num Lock, or Scroll Lock is activated
- Your user ID and the environment that you are logged into

Fast Path

Fast Path is a dockable toolbar. You use commands in Fast Path to quickly move among menus and applications. A fast path command can be any of the following items:

- An abbreviation that is either shipped with J.D. Edwards demo data or that you define to suit your business environment. For example, the fast path OMW might take you to the Object Management Workbench application so that you can work with J.D. Edwards software objects.

- A task ID.

- A program name.

To display the Fast Path toolbar, choose Show from the View menu, and then click Fast Path. To use it, enter a fast path code in the toolbar and press Enter.

In Solution Explorer, you can use fast path commands to launch Windows executables, task views, OneWorld applications, and so on. If you use Fast Path to open a menu, the Explorer switches to a task view (if you were using the web browser) and displays the menu that you selected in a window (the Link Window) to the right of the task view window. To specify a task view, enter its Internal Task ID, followed by a colon in front of the menu that you want to launch. For example, when you enter 101:RBM021444, the system displays not only the Master Scheduling Inquiries menu in the Link Window, but also the OneWorld Menus task view in the task view window. You can determine a task view's Internal Task ID by clicking on the uppermost item in the task view, and then clicking on the Advanced tab in the Task Properties window. To display the Task Properties Window, choose Show from the View menu, and then click Task Properties.

To specify a form, enter the application's ID followed by a |, and then enter the form ID. For example, when you enter P01012|W01012B, the system displays the Work with Addresses form in the Work with Addresses application. You can specify a version of a form to open by adding the version number after the form name with a |, such as P01012|W01012B|ZJDE0003.

Note

Not all objects have fast path commands.

Favorites Bar

The Favorites Bar, a dockable toolbar, displays the tasks and folders that you have placed in your Favorites. You can launch applications by double-clicking a task in this toolbar. For more information about setting up Favorites, see *Using the Favorites Task View.*

To display the Favorites Bar, choose Show from the View menu, and then click Favorites Bar.

Changing Your User Options

You can access user option information from Solution Explorer. From the View menu, choose User Options. The User Default Revisions form appears.

The following list describes the associated application for each button on the User Default Revisions form:

User Profile Revisions	This button accesses the User Profile Revisions application. Only system administrators should change user profiles. See the *User Profiles* section in the *System Administration* documentation for more information about modifying user profiles. However, you can use this button to view your current user profile.
View Local Output	This button accesses the PrintQueue directory on the machine that is running J.D. Edwards software. This queue contains the Adobe Acrobat Portable Document Format (PDF) version of any reports that you have run. For more information, see *To view report output* later in this topic.
Submitted Reports	This button accesses the Work With Servers application, which you can use to check the status of a submitted report or job, change your report or job priority, work with the

report output, and review errors. For more information, see the *Submitting a Report* section of the *Enterprise Report Writing* documentation.

Menu Revisions	This button accesses the Work With Menus application, which you use to modify the appearance of menus in J.D. Edwards software.
Change Password	This button accesses the User Password Revisions application, which provides a means for you to change your own system password, as explained later in this topic.
Default Printer	This button accesses the Work With Default Printers application. Only system administrators should change default *printer settings.* See *Working with the Printers Application* in the *System Administration* documentation for more information. You use the Work With Default Printers application to add or change a system default printer, or to change the status of a default printer.

► **To change your password**

1. On Solution Explorer, choose User Options from the View menu.

2. On User Default Revisions, click Change Password.

3. On User Password Revisions, complete the following fields and click OK:

   - Old Password

   - New Password

   - New Password - Verify

► **To view report output**

Before you can view the output of your reports online, you must run a report version. See *Batch Versions for Reports* for information about how to run a report.

1. On Solution Explorer, choose User Options from the View menu.

2. On User Default Revisions, click View Local Output.

3. On the Open form, choose a file and click Open.

A PDF version of the report appears. You can also view log files, such as error logs. To do so, choose "UBE Log Files" from the Files of Type field.

Working with the Web Browser

You can access the Internet through the web browser component of Solution Explorer. To access the web browser, choose Internet from the View menu or click the Internet button on the Toolbar. If you know the address of the web page that you want to view, enter it in the field on the Toolbar and click Go. Otherwise, click the Search button to locate one or more Web sites.

Additionally, your system administrator can configure a special page called the Solution Explorer Home Page. The Home Page can contain OneWorld and company-related links and data. Typically, you see the Home Page when you first log on to OneWorld. If you have been using the web browser to view other pages and web sites and would like to return to the Home Page, click the Internet button on the Toolbar twice.

See Also

- *Solution Explorer Toolbars* for a complete description of the buttons on the Toolbar

Opening Menus and Applications in Solution Explorer

Within the Solution Explorer, the term "menu" can be used in two different ways. A menu can be a drop-down or pop-up list of options, such as those that are common to Windows applications. In the Explorer, a menu can also be a tree-structured list of various OneWorld items such as applications and reports. Menus of the this type are available only in task views.

In task views, you navigate through menus to locate and perform tasks such as launching an application, processing a report, and so on. OneWorld provides several methods of finding and displaying menus.

You can also use Fast Path to open menus and applications. See *Using Fast Path* for more information.

Understanding the Task View Menu Tree Structure

OneWorld items such as applications and reports are grouped in menus that are arranged in a tree structure. If a plus (+) sign appears to the left of a menu item, you can expand that item to show the items that have been grouped under it. Menu items under which other items have been grouped are called nodes. Any OneWorld item, even other nodes, can be grouped in nodes. If a minus (-) sign appears to the left of a menu item, that item is expanded as far as possible. You can expand and contract menus in two ways.

In any task view, from the tree structure in the left pane:

- Use your mouse to click directly on the plus (+) or minus (-) sign.

- Use your mouse to double-click on the text of the menu. For example, if you double-click the "Foundation Systems" text, that menu either expands or contracts.

Launching Applications in a Task View

Many menu items, also known as tasks, launch an application or submit a report when you activate them. To activate a software task, perform one of the following:

- Double-click the task's icon or text.

- Single-click the task and then click the Idea To Action button on the Toolbar.

Some tasks allow you to set values, select a version, or define data selection. To set these variables, right-click the task, choose Prompt For from the pop-up menu, and then choose the option that you want. The system disables options that cannot be set for that task.

Opening Menus and Applications Using Find It!

Find It! is a utility that you can use to search for any OneWorld item including applications, menus, and reports. You do not need to know the full name of an item to locate it with Find It! You can use Find It! to perform a word search or an advanced search. Use word search to find tasks based on their name (description). Use advanced search to find items based on their object name, object code, date and time of last update, or any combination of these criteria.

▶ **To use Find It! to perform a word search**

1. From the Tools menu, choose Find It!

2. Click the Word Search tab.

3. Enter the name of the item that you want to find in the Search Words field and then click the Find It! button on the Toolbar.

   If the item that you want to find is an activator, and if you know its type (business or technical), you can limit the search by specifying the activator type in the Activator Type field.

   If you do not know the item's exact name, enter a single word or a string of words to display all menus and applications that match. For example, if you enter ADDRESS BOOK, Menu Word Search displays menus and applications that contain the words address book, such as the Address Book Category Codes menu and the Customer Address Book Revisions application.
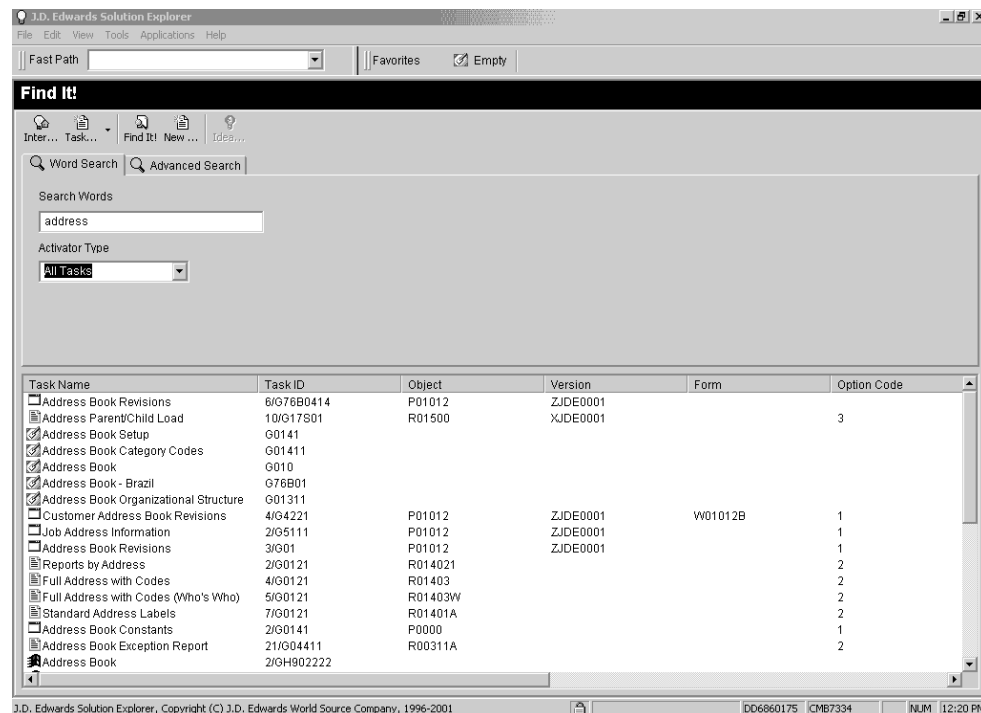
4. On Find It!, double-click the item that you want to launch.

    Double-clicking an application launches the application. Double-clicking a report starts the report processing. You can also single-click the task, and then click the Idea To Action button. To set processing options (when available), right-click the task, choose Prompt For from the pop-up menu, and then choose the option that you want.

    Double-clicking a menu launches the OneWorld task view. The menu that you double-clicked appears in a window (the Link Window) to the right of the OneWorld task view window.

► **To use Find It! to perform an advanced search**

1. From the Tools menu, choose Find It!
2. Click the Advanced Search tab.
3. Complete one or more of the following fields, and then click the Find It! button on the Toolbar:

    -   Object Name
    -   Product Code
    -   Last Updated

4. Double-click the item that you want to launch.

    Double-clicking an application launches the application. Double-clicking a report starts the report processing. Depending on its processing options, you might be prompted to choose a version of the report or to set other parameters.

    Double-clicking a menu launches the OneWorld task view. The menu that you double-clicked appears in a window (the Link Window) to the right of the OneWorld task view window.

Working with Task Views

With the Solution Explorer, you can access OneWorld menus and applications through different task views. Task views in Solution Explorer contain particular kinds of task relationships that represent processes that you follow to complete essential jobs in the system. Tasks in a task view might launch an application, display a series of child tasks, or link to another task view.

To launch a particular task view, choose Task Views from the View menu, and then choose the task view that you want from the resulting list.

Note

Depending on your configuration, some task views might be unavailable to you, or you might be able to access other views that are not described here.

See Also

-   *Solution Accelerator Suite* documentation for a description of other administrative views

- *Opening Menus and Applications in Solution Explorer* for instructions on manipulating the menus and launching applications in task views

Using the OneWorld Menus Task View

The OneWorld Menus task view contains the suite of OneWorld applications arranged in a tree structure.

Using the End-User Tasks Task View

The End-User Tasks task view contains menus that are based on the role or roles of the particular user. For example, a user might be assigned to the role of purchasing clerk. The role-based menu associated with this role contains only those menu items associated with making purchases.

The system administrator sets your roles, and the tasks that you can see, in this view.

▶ **To apply a role**

1. In the Solution Explorer End-User Tasks task view, right-click any task in the task view menu, and then choose Apply Role from the pop-up menu.

   The Apply Role form appears. All of the roles to which you have access appear in the detail area.

2. In the detail area, click the new role that you want to apply, and then click Select.

Using the J.D. Edwards Education Task View

The J.D. Edwards Education task view displays courses available at J.D. Edwards training centers. Training paths and course descriptions for each product vertical are also available.

Using the Favorites Task View

The tasks that you use most frequently are placed in the Favorites task view, which provides easy access to them from one convenient location. You can create favorites that quickly identify your favorite tasks and then arrange those favorites as children of the identifying task.

Items that you place in your Favorites appear in your Favorites Bar, and thus you do not need to return to the Favorites view to access an item. To display the Favorites Bar, select Show from the View menu and then click Favorites Bar.

You can add existing tasks either by clicking on the task and using the Send To function, or by inserting the task directly into your Favorites if you know the name of the task. You can also create tasks for your Favorites. For example, if you created your own version of a report, you can create a task in your Favorites that enables you to access your report version easily. In addition to creating tasks for launching J.D. Edwards software objects, you can create placeholder tasks under which you can place other tasks. These non-software tasks become nodes when you place child tasks under them. Placeholder tasks help you to organize the tasks in your task view.

► To add a task to Favorites with Send To

1. Right-click the task that you want to add, and then choose Send To from the pop-up menu.

   Remember that a task can be an item that performs a function such as launching an application, or that acts as a node that holds several tasks below it. If you add a node to your favorites, all of its children are added as well.

2. Ensure that Favorites is selected, and then choose to copy only the task or the task and all of its subtasks to your Favorites.

3. Click OK.

   The system adds your selection to your Favorites.

► To add a task to Favorites with Insert Existing Task

1. On your Favorites task view, choose the task under which you want to insert the task that you are adding.

2. Right-click the task that you selected, and then choose Insert Existing Task from the pop-up menu.

3. On Task Relationship Revisions, complete the following fields:

   - Child Task ID

   - Required

   You can enter more than one task in the detail area if you want to add more than one task to your Favorites at the same time.

4. Click OK.

   If you added more than one task to the detail area, all of the tasks that you added will be added to your Favorites.

Note

If you add a task under a task that has no children, when you click OK, the detail area on the Task Relationship Revisions form clears and the form remains open. Click Cancel to close the form. The tasks that you added appear in the task view menu.

► **To create a new task for Favorites**

1. Create the object for which you want to create a task.

   For example, create your own version of a report.

2. In the Favorites view of the Solution Explorer, choose the task under which you want to add the new task.

3. Right-click the task, and then choose Insert New Task from the pop-up menu.

4. On Task Revisions, enter a name for the task in the Task Name field.

5. Click the Common tab and enter a product code in the Product Code field.

   Leave the Activator Type field blank. Ensure that the Required checkbox is not checked and that the Active checkbox is checked.

6. Click the Executable tab and indicate the type of object that your task launches when it is executed.

   The system prompts you to specify which object to launch along with any applicable processing options.

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, as well as the version and form names. You must also set up processing options, if applicable.

- Interactive

- Application

- Version

- Form

- Option Code

- Form Mode

     Leave this field blank.

- Batch

- Application

- Version

- No Processing Options

- Blind Execution

- Prompt for Version

- Prompt for Values

- Data Selection

- Data Selection and Values

- Windows

- Windows Executable

- Working Directory

- Executable Parameters

- AAI

- Application

- Version

- Form

- Option Code

     Leave this field blank.

- Form Mode

     Leave this field blank.

- Constant

- Application

- Version

- Form

- Option Code

     Leave this field blank.

- Form Mode

     Leave this field blank.

7. Click the Resources tab and complete the following optional fields:

- Base Resource

- Base Units

- Unit of Measure

8. Click OK, and then click Cancel to return to the Favorites task view.

► **To create a placeholder task**

1. In the Favorites view of the Solution Explorer, choose the task under which you want to add the placeholder task.

2. Right-click the task that you selected, and then choose Insert New Task from the pop-up menu.

   The Task Revisions form appears.

3. Enter a name for the placeholder task in the Task Name field.

4. Click the Common tab and enter a product code in the Product Code field.

   Leave the Activator Field blank. Ensure that the Required checkbox is not checked and that the Active checkbox is checked.

5. Click the Executable tab and click the Non-Software option.

6. Click OK.

► **To reorganize Favorites**

From the Favorites view, perform either of the following after you add tasks and folders to your Favorites:

- To delete a task from your favorites, right-click the task that you want to delete, and then choose Delete Relationship from the pop-up menu. The system confirms that you want to delete the relationship. If you delete a parent object, all of its children will be removed from your favorites as well. When you delete a relationship in this manner, the system does not delete the task from the system; only your Favorites is affected.

- To make a task or folder into a child (that is, a subtask or subfolder) of another task or folder, drag it onto the task or folder that you want to use as a parent. The Explorer modifies the tree structure of your Favorites accordingly.

Working with Variant Task Views

Your system administrator can create versions of different task views that you can use to easily access the tasks that you need. Applying a variant applies a predefined filter to part of the task view's menu. For example, if a menu in your task view showed tasks related to both customers and suppliers, you can choose to view either of two variants: customer-related tasks or supplier-related tasks.

Although a task view can have many variants, each variant is actually referenced by the parent task in the tree under which the tasks are filtered. The parent task in the tree that you select before applying a variant is known as the root.

You can clear the variant and return to the original view of the menu at any time.

Note

The variant does not permanently override the relationships that you originally see in a task view before you apply the variant, which is simply an alternate way to view the data. Switching between the original view and the variant view does not affect the tasks within the view.

Note also that not all task views have variants.

▶ **To apply a variant task view**

1. In a task view of the Solution Explorer, right-click a task, and then choose Apply Variant from the pop-up menu.

2. On Variant Selection, choose the variant that you want to apply and then click Select.

   Use the *Only Show Root Variants* option to display only those variants that will affect the child tasks of the parent task (the root) that you right-clicked.

   The system applies the variant to the task view and collapses the parent task.

3. Expand the parent task to see the variant.

▶ **To clear a variant task view**

1. In a task view of Solution Explorer, choose the parent task (the root) with child tasks that are currently affected by the variant.

2. Right-click the parent task and choose Clear Current Variant.

   The system removes the variant, returning that portion of the menu to its original state so that the parent task collapses.

3. Expand the parent task to verify that the variant has been cleared.

Working with Task Documentation Window Content

The documentation window contains information that you select on tabs that classify the documentation type. Much of the task documentation in Solution Explorer comes preloaded. However, you can write your own documentation for tasks. To display the task documentation, choose Show from the View menu, and then click Task Documentation.

Note

Some tasks do not use instruction-type tabs; therefore, some tabs do not appear.

See Also

❑ *Documenting Tasks* in the *Solution Explorer Implementation* documentation for information about writing your own documentation

Summary Tab

The Summary tab provides a comprehensive abstract of the task, including its business purpose, how it integrates into your system, and the processes contained within the system. Summary documentation might also include general examples of how the task is used.

Detail Tab

The Detail tab provides instructions on the steps that are required to complete a task. Such documentation might also include general comments about a particular step in the instructions and specific examples associated with to completing the process.

Before You Begin Tab

The Before You Begin tab provides documentation about the task's influence on other processes, programs, and systems, and includes steps that you might be required to complete before you begin a task. Before You Begin documentation might also describe possible outcomes when you complete a task, such as the consequences of failing to complete a step in the process.

Notes Tab

The Notes tab provides explanatory information to a user about a task. For example, if you have changed the purchase order process, you might write Notes documentation that explains why you made the change.

Deliverables Tab

The Deliverables tab provides links to documentation associated with a task. For example, if you use a task to create an engagement letter, you might create a link to the engagement letter so that the user can see what it looks like in its completed state.

Custom Tab

Anytime that you want to develop documentation that does not fit into one of the existing categories, you can create custom documentation. This feature meets the J.D. Edwards ongoing commitment to Idea to Action. You, the user, can adapt the system to meet the needs of your business. The system exists to serve you.

Understanding Task Properties

When you are in a task view, you can display a window that shows system information about any item that you select in the task view window or the Link Window. To display the Task Properties window, choose Show from the View menu, and then click Task Properties.

The Task Properties window has three tabs: Basic, Intermediate, and Advanced. Based on the item currently selected, the information in the Task Properties window will vary. Some of the information on the tabs is described below:

- Activator Type resides on the Basic tab, and is useful if you want to use the Activator task view or search by Activator type with the Find It! utility.

- Version resides on the Intermediate tab.

- Object Name resides on the Intermediate tab.

- Links are shown on the Intermediate tab. If an object is linked to another object, you can launch the second object with the Link button on the Toolbar.

- Task ID resides on the Advanced tab. If you know an object's task ID, you can launch it directly from the Fast Path Bar.

Running the Universal Director

Some Solution Explorer tasks have a light bulb next to their icons. Launching these tasks automatically launches the Universal Director. The Director provides a single interface that leads you through the steps of major tasks.

For example, you might have a task called New Customer that you use to enter new customers into the system. If this task is set up as a Universal Director task, the Universal Director might first guide you through adding an address book record for the customer, then adding a customer master record, and then creating the initial sales order. At each step, the Universal Director launches the appropriate application.

The Universal Director displays a list of steps that are required to complete the task. As you complete the steps, the Universal Director marks them as complete. You can choose to move backwards and forwards through the list, or to skip steps altogether. You can also display the documentation window for help with steps, as shown below:
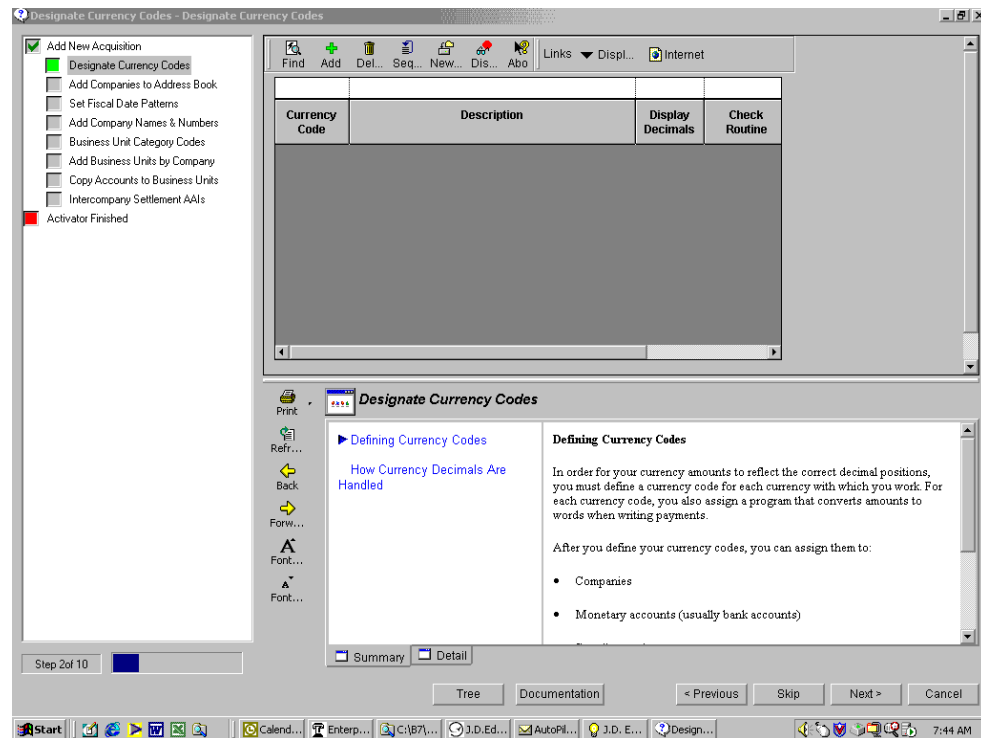
The buttons at the bottom of the Universal Director form have the following functions:

Tree
The Tree button hides or shows the window that displays the steps in the process that you are currently performing.

Documentation
The Documentation button hides or shows the documentation window.

Previous
The Previous button returns you to the previous task in the process.

Skip
The Skip button allows you to skip the current task and move to the next task in the process. Steps that you skip are marked with a red dash in the tree window.

Next
The Next button allows you to move to the next task in the process. You typically use this button in conjunction with the Previous button.

Cancel
The Cancel button halts the Universal Director and closes the Universal Director form.

► **To run the Universal Director**

1. From any task view of the Solution Explorer, select a task marked with the light bulb icon.

2. Click the Idea To Action button on the Toolbar.

    The system launches the Universal Director.

3. Proceed through the tasks in the activator, clicking the Next button after you complete each task.

J.D. Edwards Explorer - Windows

J.D. Edwards Explorer is the graphical user interface to J.D. Edwards software itself. J.D. Edwards Explorer:

- Uses menus as the basis of navigation throughout J.D. Edwards software. These menus display icons with text to represent J.D. Edwards (and third-party) applications, reports, and other menus.

- Displays menus in a tree structure. You can use the structure to open a menu to display additional menus, and the applications or reports associated with the menu.

- Includes a status bar, menu bar, toolbar, and menu selections that provide access to additional features, including user preferences and display settings.

Signing On and Off OneWorld

To sign on to OneWorld, you must enter a user ID and password on the OneWorld Sign On form. User IDs define the following types of information for each user:

- Security and permissions
- Initial menu
- Language and currency symbol
- Display preferences

On the OneWorld Sign On form, you also have the option to choose the OneWorld environment in which you work. The system administrator will set up your environment for you. Typically, you will need only one environment in which to work.

Signing On to OneWorld

You must sign on to OneWorld to use the system.

► To sign on to OneWorld

1. To access the OneWorld Sign On form from Windows 95 or Windows NT 4.x, choose the OneWorld icon.

2. On OneWorld Sign On, complete the following fields and then click OK:

    - Environment

        For a list of environments, click the Environment field, and then click the search button that appears to the right of the field. The Select User Environment form appears. Choose the appropriate environment and then click Select. The Select User Environment form disappears and the environment that you selected appears in the Environment field on the OneWorld Sign On form.

        After you choose an environment, that environment is the default environment each time that you sign on to OneWorld. To use a different environment, access the Select User Environment form again and select a different environment. Your authorization might allow you to access a number of environments. However, only the environments loaded onto the workstation that you are using, and to which you have access, appear on the Select User Environment form.

3. On OneWorld Sign On, click OK.

   The J.D. Edwards Explorer appears.

Signing Off of OneWorld

When you finish your work in OneWorld, you must sign off the system. When you sign off of OneWorld, you exit both the OneWorld application and the database.

► **To sign off of OneWorld**

From any OneWorld menu, choose one of the following methods to sign off:

- Choose Exit from the File menu
- Click the X button at the right of the Title bar
- Press Alt + F4

If a check mark appears next to the "Save Settings on Exit" selection on the File menu, OneWorld saves any changes that you made to your display.

Understanding J.D. Edwards Explorer

As a graphical user interface, J.D. Edwards Explorer has a familiar look and feel. It comes equipped with a tree structure of menus, menu selections (icons and descriptive text) for accessing applications or additional menus, a menu bar with pull-down menus that provide choices for applications and menus, a toolbar for fast access to helpful commands, and a status bar that displays additional information, such as error messages and the time of day.

Tree Structure

The tree structure appears in the left pane of the J.D. Edwards Explorer window. Each item in this tree structure is a menu. If a plus (+) sign appears to the left of a menu, you can expand that menu to see additional menus. If a minus (-) sign appears to the left of a menu, that menu is expanded as far as it goes. You can expand and contract menus in two ways:

- Use your mouse to single-click directly on the plus (+) or minus (-) sign.
- Use your mouse to double-click on the text of the menu. For example, if you double-click directly on the "Foundation Systems" text, that menu will either expand or contract.

You can cause a menu in the tree structure to display its contents (called menu selections) in the right pane of the J.D. Edwards Explorer window. Choose any menu in the tree structure (choose a menu by single-clicking directly on the menu text) and its menu selections appear in the right pane. The menu selections are either applications or additional menus, or a combination of applications and menus. The tree structure, however, only displays menus. For more information about navigating menus, see *Opening Menus*.

The menus that appear directly beneath the Master Directory menu reflect the application suites that are installed for your business environment. The suites can differ not only between enterprises, but also between departments within an enterprise. The application suites might include financials, human resource management, distribution/logistics, and manufacturing. For more information about application suites, see *System Integration* in the *OneWorld Foundation* documentation.

Menu Selections

Menu selections appear in the right pane of the J.D. Edwards Explorer window. Each menu selection is an icon followed by descriptive text. Use menu selections to access:

- OneWorld interactive and batch applications

- Third-party applications, including WorldSoftware programs accessed through the WorldVision™ interface

- Other menus

You can display menu selections in a variety of ways. For example, you can display them as large icons, small icons, a detailed list, or even as a Web page. For information about changing the menu selection view, see *Changing the Appearance of J.D. Edwards Explorer*.

When you sign on to OneWorld, the same initial menu appears in the right pane of the window. Your system administrator sets this initial menu in the Menu Identification field of your user profile. This menu should be appropriate to the type of work that you do. For example, if you typically enter invoices, you should probably start in the appropriate Accounts Receivable menu.

Menu Bar

The menu bar provides pull-down menus that display options for a menu or an application. To choose menu options, either use your mouse to single-click on an option or use the keyboard. Whenever a single, underlined letter appears in an option, you can press the Alt key plus the key that corresponds to the underlined letter to access the option. For example, the letter F is underlined in the word File on the menu bar, so you can access the File pull-down menu with your keyboard by pressing and holding the Alt key and then pressing the F key.

The following table describes each menu option that appears the menu bar:

File	Use this option to create tabs, open menus, save display settings, and exit the system.
Edit	Use this option to remove tabs, access processing options, and locate versions.
View	Use this option to change the appearance of the menu selections in the right pane of the J.D. Edwards Explorer window; turn on and turn off the menu tree structure, menu bar, and status bar; and access a menu for changing user preferences.
Tools	Use this option to access the following: - Calendar - Calculator - Internet
Applications	Use this option to display a list of all applications that are currently open.
Help	Use this option to access online help.

Toolbar

The toolbar enables you to access frequently used commands. You can turn the toolbar on and off from the View menu.

When you move the cursor over a toolbar button, the button becomes highlighted and the system provides a brief description below your cursor as well as a complete description in the status bar of the form.

The following table provides information about the functions available on the toolbar:

New Tab button	Accesses a form that allows you to add new tabs in the right portion of J.D. Edwards Explorer.
Open button	Accesses a form that allows you to enter search criteria about a menu when you do not know the menu title.
Save Object button	Allows you to save an object that you insert on an object tab.
Show/Hide Menu Tree button	Toggles the tree structure in the left portion of J.D. Edwards Explorer on and off.
Refresh button	Updates J.D. Edwards Explorer with any changes that are made to your menus while you run J.D. Edwards software.
Remove Tab button	Removes any tab that you add to J.D. Edwards Explorer. However, you cannot remove the first tab.
Large Icons button	Switches to a view that displays large icons.
Small Icons button	Switches to a view that displays small icons.
List button	Switches to a view that displays items in a column format.
Detail button	Switches to a view that displays items in a list that includes information about the menu selection.
Web button	Switches to a view that displays items as a Web page.
Home button	Returns to the menu that you set when you created the tab.
Back button	Moves to the previous menu accessed from the current tab .

Forward button	Moves to the next menu accessed from the current tab. You can only use this button after you use the Back button to move to a previous menu.
Word Search button	Opens the Menu Word Search application. This application allows you to enter search criteria to locate and access menus and applications.
Fast Path	Allows you to enter a menu ID to open a particular menu.

Status Bar

The Status bar appears at the bottom of the J.D. Edwards Explorer. You can turn the Status bar on and off from the View menu. The following information appears on the J.D. Edwards Explorer status bar:

- A description of a highlighted menu bar item

- A description of a toolbar item over which you move the cursor

- Error messages

- A message that contains the status of ongoing processes in OneWorld

- Copyright information about J.D. Edwards Explorer

- Fields that notify you whether Caps Lock, Num Lock, and Scroll Lock are activated

- The time

Working with J.D. Edwards Explorer

J.D. Edwards Explorer is the gateway to J.D. Edwards applications, reports, menus, external objects such as attached documents and spreadsheets, and the Internet or an intranet through attached Web pages.

J.D. Edwards Explorer allows you to change display options, change user options, access applications through custom tabs, and open menus through a variety of methods.

Changing the Appearance of J.D. Edwards Explorer

You can change the appearance of J.D. Edwards Explorer. You can use the View menu from the J.D. Edwards Explorer menu bar to adjust the following settings:

- Toggle on or off the menu tree structure, the toolbar, and the status bar.

- Change how OneWorld displays menu selections (which can be applications or menus) in the right pane of J.D. Edwards Explorer. You can specify whether the menus and applications appear as large icons, small icons, a simple list, a detailed list, or a Web page.

- Refresh your view if changes occur, such as the addition of a new menu selection.

You can also manually adjust the toolbar and change the widths of the left and right panes of the J.D. Edwards Explorer window.

You can save any display changes to J.D. Edwards Explorer. From the File menu, ensure that the "Save Settings on Exit" selection is turned on (a check mark appears next to it).

► **To toggle on or off the tree, the toolbar, and the status bar**

On J.D. Edwards Explorer, from the View menu, click any of the following options:
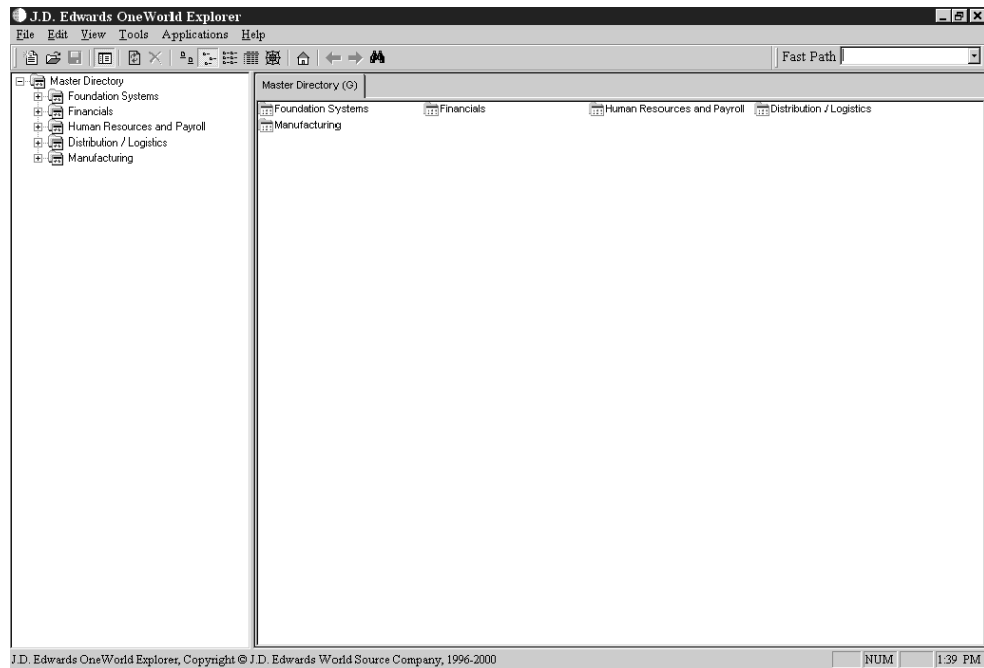
- Tree

- Toolbar

- Toolbar Text

- Status Bar

► **To change the menu selection view**

On J.D. Edwards Explorer, from the View menu, choose one of the following:

- Large Icons. This style displays a large icon and the name of the application or menu from left to right.
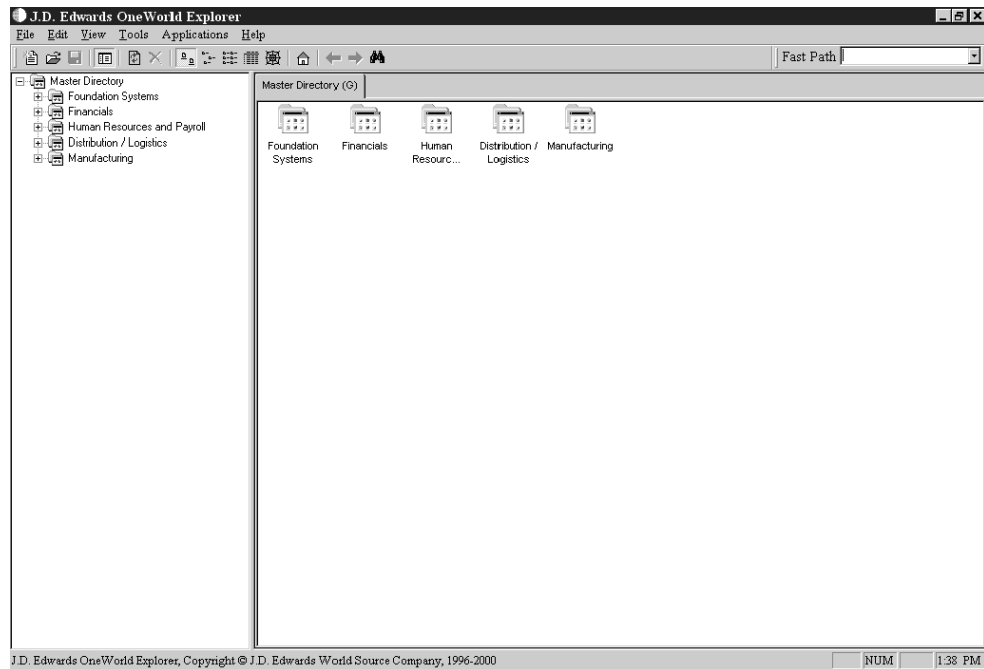
- Small Icons. This style displays a small icon and the name of the application or menu from left to right.

- **List.** This style displays a small icon and the name of the application or menu as a list from top to bottom.
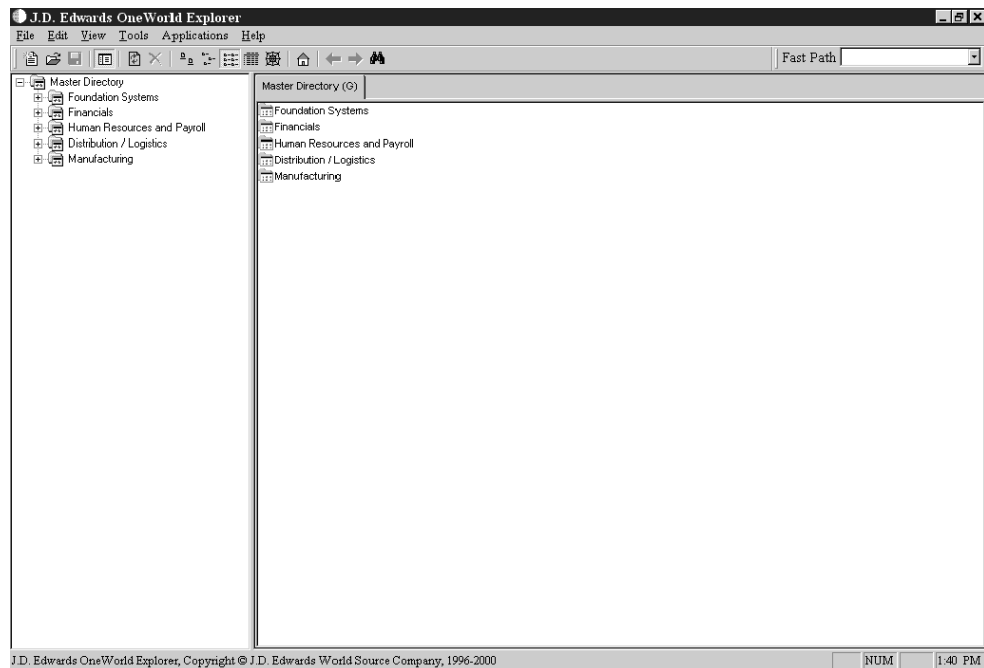
- **Details.** This style displays a small icon and the name of the application or menu, its program ID, and, if applicable, the report version associated with the application. For example, the program ID for Word Search (an interactive

application) is P01BDWRD, and the program ID for Reports by Address (a batch application) is R014021.
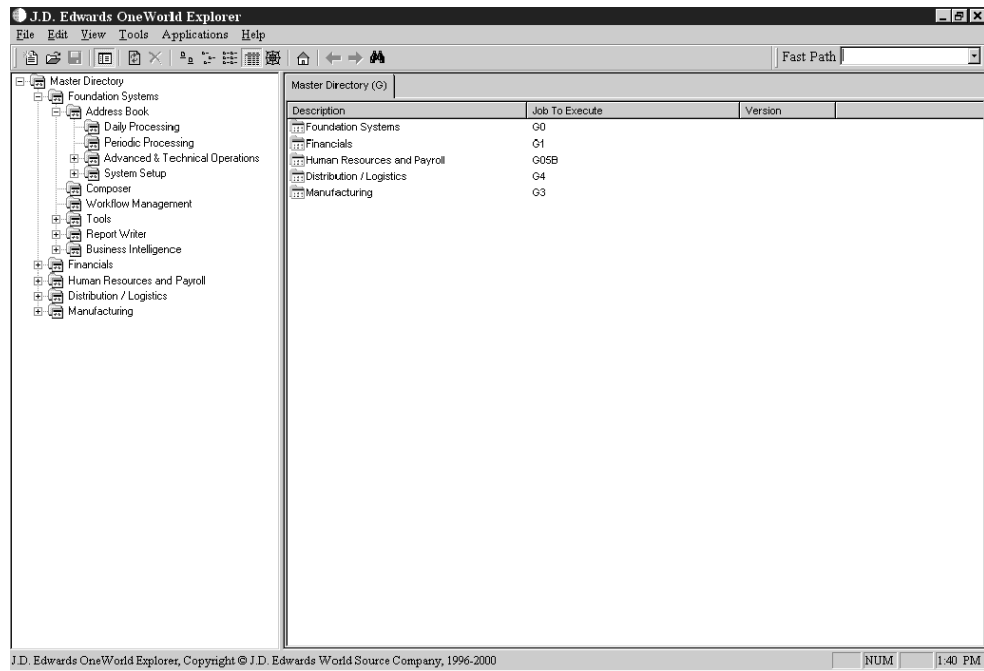
- Web. This style displays icons and the name of the application or menu as a Web page.
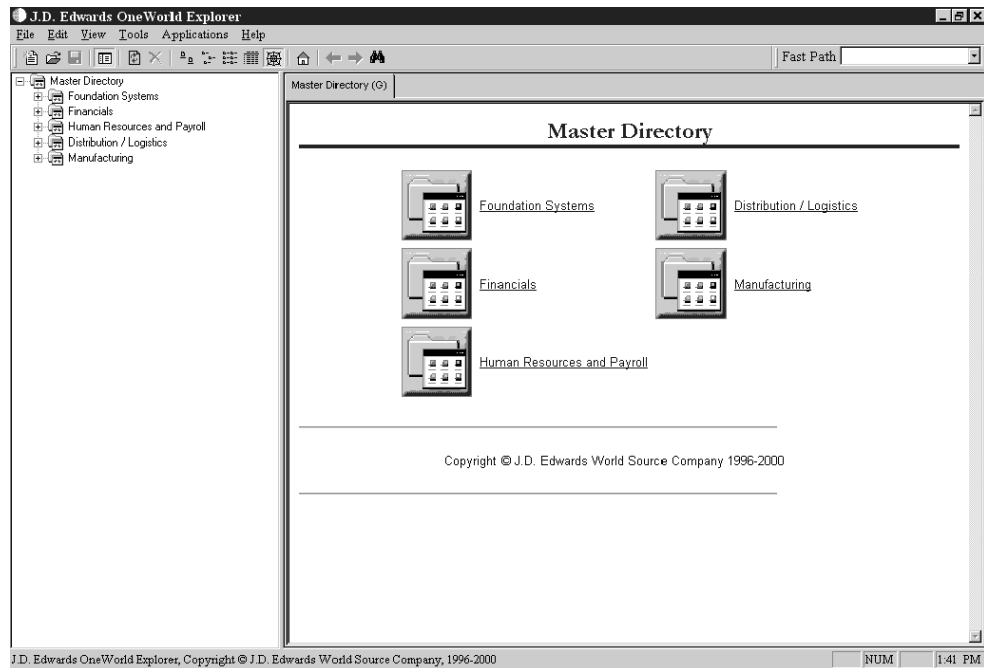
► **To refresh your view**

On J.D. Edwards Explorer, to refresh your display to reflect any changes to menus and icons, click the Refresh button on the toolbar.

► **To adjust the appearance of the toolbar**

1. On J.D. Edwards Explorer, move the cursor over the pair of vertical lines on the left edge of the toolbar. The cursor changes to a double arrow. For example, the Fast Path toolbar has a pair of vertical lines to the left of the words "Fast Path."

2. Click and hold the left mouse button, and then do one of the following:

   - Move the cursor left or right to display more or less of the selected toolbar.

   - Move the cursor down to display the selected toolbar below the other toolbar.

► **To adjust the width of the left and the right panes**

1. On J.D. Edwards Explorer, place the cursor over the divider between the two panes until the pointer changes to a double arrow.

2. Click and hold the left mouse button and drag the pane either to the right or to the left until it reaches the desired size.

3. Release the mouse button.

Changing Your User Options

You can access user option information from J.D. Edwards Explorer. From the View menu, choose User Options. The User Default Revisions form appears.

The following list describes the associated application for each button on the User Default Revisions form:

User Profile Revisions	The User Profile Revisions application allows you to change user profiles. Only system administrators should perform this function. See *User Profiles* in the *System Administration* documentation for complete information.
	Using the User Profile Revisions application, you define a specific user or group to the system with such information as the deployment location of a package, the list of packages a user or group can install, the list of environments that a user or group can choose from when signing on to the system, and the language preference of the user or group.
View Local Output	This button accesses the Print Queue directory on the machine that is running J.D. Edwards software. This queue contains the Adobe Acrobat Portable Document Format (PDF) version of any reports that you have run. For more information, see *To view report output*.
Submitted Reports	This button accesses the Work With Servers application, which you can use to check the status of a submitted report or job, change the priority of your report or job, work with the report output, and review errors. For complete information, see *Submitting a Report* in the *Enterprise Report Writing* documentation.
Menu Revisions	This button accesses the Work With Menus application, from which you can create, change, delete, copy, and filter both menus and menu selections. For complete information, see *Menu Design* in the *System Administration* documentation.
Change Password	This button accesses the User Password Revisions application, which provides a means for you to change your own system password, as explained later in this section.

means for you to change your own system password, as explained later in this section.

Default Printer   This button accesses the Work With Default Logical Printers application. Only system administrators should change default printer settings. See *Defining a Default Printer* in the *System Administration* documentation for complete information.

With the Work With Default Logical Printers application, you can add or change a system default printer, or change the status of a default printer.

► **To change your password**

1. On J.D. Edwards Explorer, from the View menu, choose User Options.

2. On User Default Revisions, click the Change Password option.
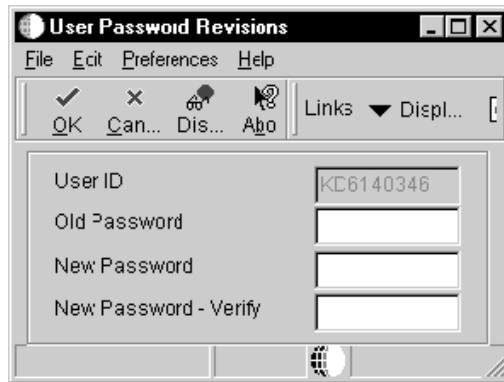
3. On User Password Revisions, complete the following fields and click OK:

   • Old Password

   • New Password

   • New Password - Verify

Before you can view your report output online, you must run a report version. See Batch Versions for Reports for information about how to create and run a report.

1. On J.D. Edwards Explorer, choose User Options from the View menu.

2. On User Default Revisions, click the View Local Output option.
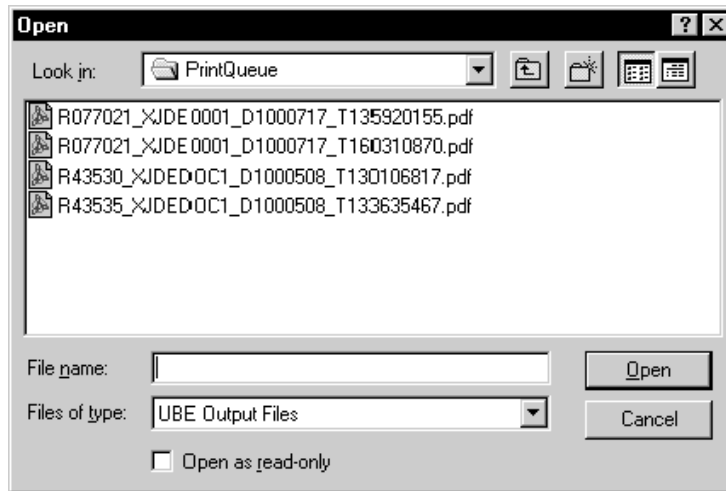
3. On the Open form, choose a file and click Open.

    A PDF version of the report appears. You can also view log files, such as error logs. To do so, on the Open form, choose "UBE Log Files" from the Files of Type field to view a list of any log files.

Creating Tabs

You can create tabs in the right pane of the window for menus, objects (such as spreadsheets and documents), and Web pages. You cannot delete the initial menu tab, but you can delete any additional tabs you or others have created.

When you open a menu that is different from the one for which you initially created the tab, the new menu replaces the initial menu on the tab. Each subsequent menu that you open in the tab also replaces the previous menu.

► **To create a new menu tab**

1. On J.D. Edwards Explorer, do one of the following:

    • Click the New Tab button on the toolbar.
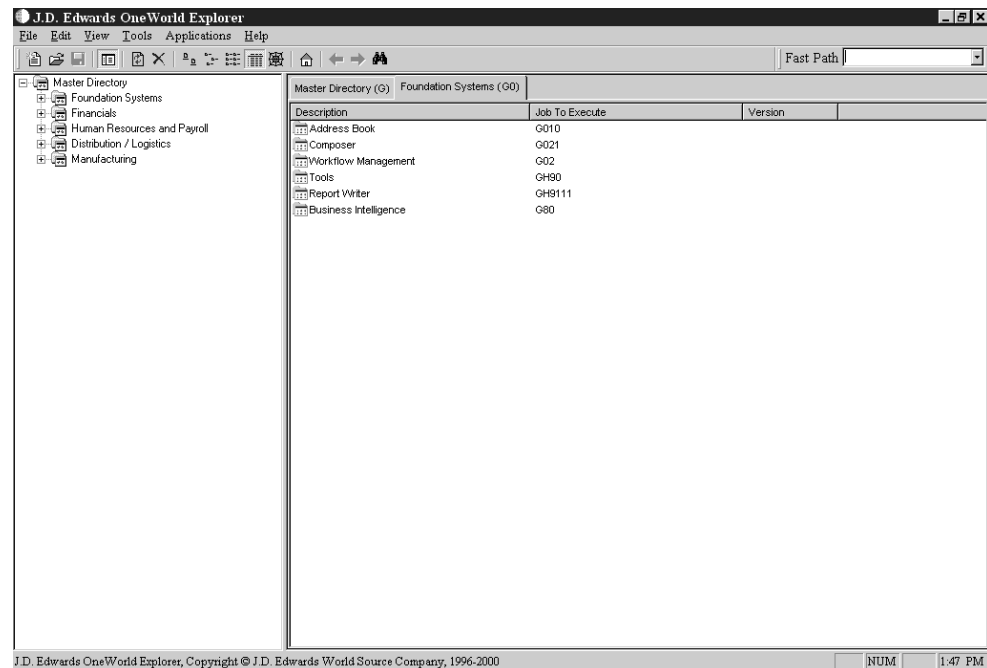
    • From the File menu, choose New Tab.
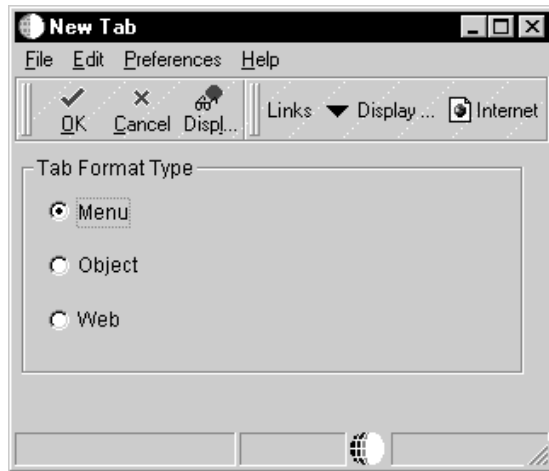
2. On the New Tab form, click the Menu option, and then click OK.
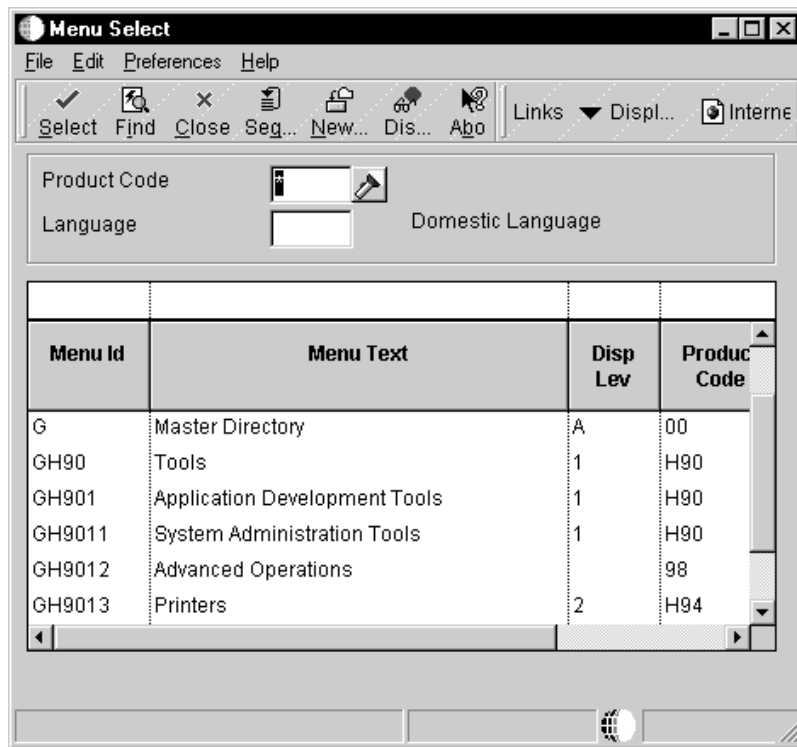

3. On the Menu Select form, complete any of the following fields to narrow your search, and then click Find:

- Product Code

- Language

4. Choose a menu title and click Select to open the menu as a new tab.

The new tab appears.

► **To create a tab for an object**

1. On J.D. Edwards Explorer, do one of the following:

    • Click the New Tab button on the toolbar.

    • From the File menu, choose New Tab.

2. On the New Tab form, click the Object option, and then click OK.
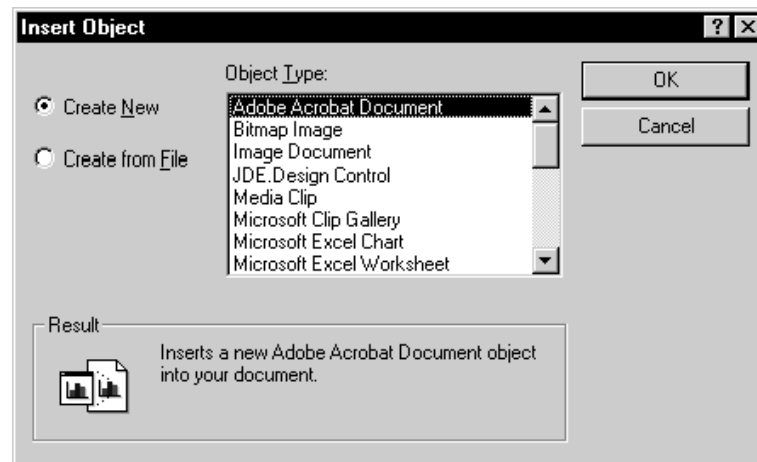
3. On the Insert Object form, choose an Object Type, and then click OK to create a new object.

The products that are installed on your workstation determine the types of selections that are available.

4. To create an object from an existing file, click the Create from File option.
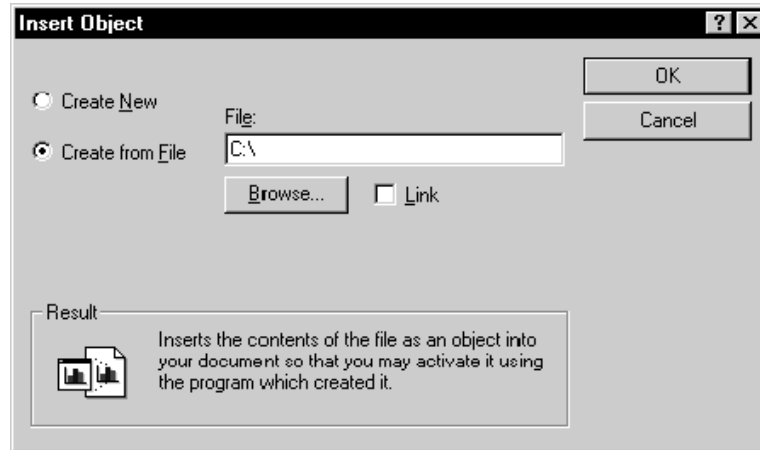
5. Under File:, enter the path and name of the desired file, and then click OK to create a new tab.

6. Click inside the tab to access all of the controls in the selected application.

See Also

❑ *Working with Media Objects* for information about attaching media objects to forms and rows instead of to a tab.

❑ *System Administration* documentation for complete information about media objects.

► **To create a Web browser tab**

When you create a tab for a Web browser, you need to identify a universal resource locator (URL). For example, the URL for the J.D. Edwards home page is www.jdedwards.com. In addition to URL addresses, you can also enter path and file names for HTML pages on your computer or on your network.

1. On J.D. Edwards Explorer, do one of the following:

- Click the New Tab button on the toolbar.

- From the File menu, choose New Tab.

2. On the New Tab form, choose Web, then click OK.

3. On the New Web Address form, enter the URL address (you do not need to enter http://), and then click OK.

The Web site appears in the tab.

▶ **To delete a tab**

1. On J.D. Edwards Explorer, choose the tab that you want to remove.

2. Do one of the following:

   • On the toolbar, click the Remove Tab button.

   • From the Edit menu, choose Remove Tab.

   Remove Tab is not available from the menu bar for object tabs because the menu bar changes to support the application for the embedded object. To delete an object tab, you can only use the Remove Tab button on the toolbar.

Opening Menus

Various ways are available for you to navigate through the OneWorld menus, such as using the tree structure in the left pane, using the menu ID in the Fast Path field, or by setting up menus as shortcuts on your workstation desktop.

See Also

❑ *Menu Word Search* for instructions on how to search for and access menus using Menu Word Search

▶ **To open menus using the tree structure**

Each item in the tree structure is a menu. If a plus (+) sign appears to the left of a menu, you can expand that menu to show additional menus. If a minus (-) sign appears to the left of a menu, that menu is expanded as far as it goes. You can expand and contract menus in two ways.
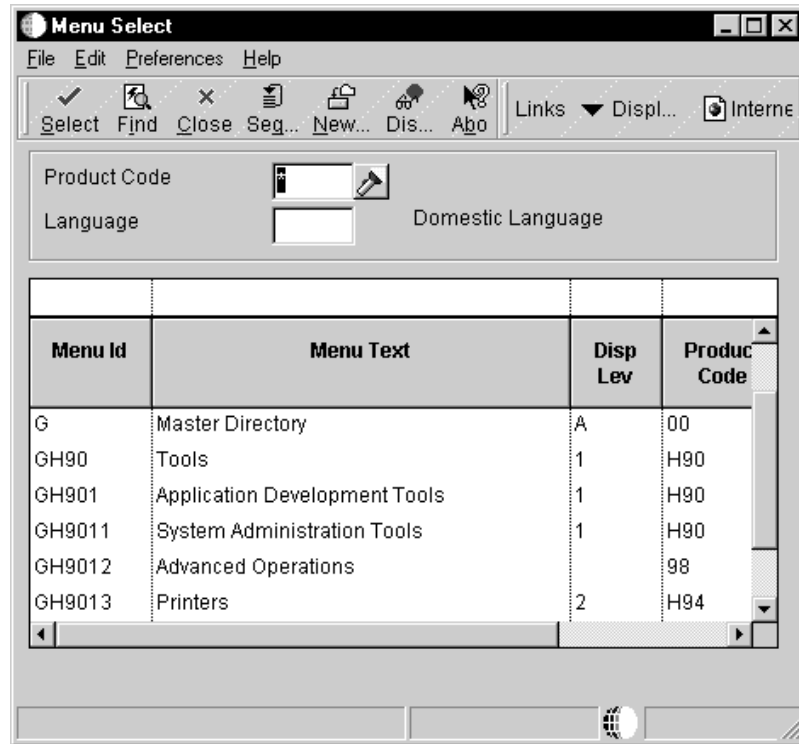
On J.D. Edwards Explorer, from the tree structure in the left pane, do one of the folliwing:

• Use your mouse to single-click directly on the plus (+) or minus (-) signs.

• Use your mouse to double-click on the text of the menu. For example, if you double-click directly on the "Foundation Systems" text, that menu will either expand or contract, depending on it's current state.

► To open menus using Menu Select

The Menu Select form can display every menu available in OneWorld. You can narrow your
search by product code and language.

1. On J.D. Edwards Explorer, from the File menu, choose Open.

2. On Menu Select, complete any of the following fields and click Find to narrow your
    search:

    • Product Code

    • Language

3. Choose a menu title, and then click Select to open the menu.

► To open menus using Fast Path

Fast Path must be activated in your user profile for you to use this method.

Every menu in OneWorld has its own unique ID. For example, the Master Directory has an ID
of G, and the Address Book menu ID is G01. The menu ID appears on the tabs in the right
pane of the J.D. Edwards Explorer window. It also appears next to menus in the right pane if
you are viewing the menu selections as a detailed list. In addition, you can define your own
Fast Path IDs, which could include applications. OneWorld provides a list of Fast Path IDs,
which you can access by single clicking on the down arrow to the right of the Fast Path field.
Fast Path also remembers up to 15 paths that you used since you signed on.

1. On J.D. Edwards Explorer, do one of the following to move the cursor to the Fast
    Path field:

- Press F4.

- Press Ctrl + F.

- Click in the Fast Path field.

2. In the Fast Path field on the toolbar, enter the menu ID of the menu that you want to open. For example, enter G01 to open the Address Book menu. You can also click the down arrow button to review and choose previously entered fast paths.

▶ **To open a menu from a desktop shortcut**

If you have an application, report, or menu that you use often, you can create a shortcut on your workstation's desktop. This feature is available to Windows 95 or Windows NT 4.x users.

1. In the right pane of J.D. Edwards Explorer, right-click on an icon for an application, report, or menu.

2. On the pop-up menu, choose Create Shortcut.

3. On the desktop, double-click the shortcut icon to open the application, report, or menu.

Opening Applications

You can open OneWorld applications in various ways, such as double-clicking on menu selection icons or text in the right pane of the window or by setting up the application as a shortcut on your workstation's desktop.

▶ **To open an application from a J.D. Edwards Explorer menu**

You can open applications by selecting their menu selection icons or text that appears in the right pane of the J.D. Edwards Explorer window. Menu selections can be interactive applications, batch applications, and other menus.

On J.D. Edwards Explorer, double-click an application icon.

The initial form for the application appears. For example, if you double-click the Name Search application, the Work With Addresses form appears.

▶ **To open an active application from the Applications menu**

You can access a list of open applications from the Application menu on the J.D. Edwards Explorer menu bar. When you select an application from this list, the application becomes the active window.

1. On J.D. Edwards Explorer, choose the Applications menu.

   A list of running applications appears.

2. Click on an application to bring it to the front.

▶ **To open an application from a desktop shortcut**

If you have an application, report, or menu that you use often, you can create a shortcut for it on your workstation's desktop. This feature is available to users with Windows 95 or Windows NT 4.x.

1. On J.D. Edwards Explorer, in the right pane of the window, click the right mouse button on an icon for a frequently used application, report, or menu.

2. On the pop-up menu, choose Create Shortcut.

3. On the desktop, double-click the shortcut icon to open the application, report, or menu.

Menu Word Search

Menu Word Search is an application that you can use to find and open menus and applications. Enter a single word or a string of words and Menu Word Search displays all of the menus and applications that match. For example, if you enter ADDRESS BOOK, Menu Word Search displays menus and applications that contain that text string, such as the Address Book Category Codes menu and the Customer Address Book Revisions application. You can also search using object names (such as P0101) and menu IDs (such as G01).

You can also use Menu Word Search to edit the following lists of words to help with your searches:

- The equivalent word list. Use it to add, change, or delete words that are similar to, but not exactly like, the full name of a menu or application. You can use an equivalent word to perform a search. For example, if you established UDC as an equivalent word, you can use those initials instead of USER DEFINED CODES when performing a search.

- The ignore word list. Use it to add, change, or delete words that you want OneWorld to ignore if you enter them by themselves, such as the word "A."

Finding and Opening Menus and Applications

You can use Menu Word Search to find menus and applications by entering search strings. When you have found the menu or application that you want, you can display the menu or run the application.

This task explains how to access the Menu Word Search application from J.D. Edwards Explorer. For information about how to access Menu Word Search from a particular application within OneWorld, see that application's guide. Not all applications have access to Menu Word Search.

► To find and open menus and applications

1. On an Explorer, do one of the following:

- From the toolbar, click the Word Search button.

- From the Menu Word Search (GH9024) menu, choose Menu Word Search (P95012).

2. On Menu Word Search, type your search criteria in the following fields and click Find:

- Search Code

  Enter a specific system code, such as 01 for Address Book or 00 for the Foundation Environment (entering * by itself also works for the Foundation Environment).

- Search Word / Object / Menu

  You can enter a single word, such as ADDRESS, multiple words, such as ADDRESS BOOK, or a word equivalent, such as UDC for user defined codes. See *Working with Equivalent Words* for detailed information. You can also search using object names (such as P0101) and menu IDs (such as G01).

To eliminate ambiguity, OneWorld edits the Search Word / Object / Menu field to all uppercase characters. Therefore, the search is not case-sensitive.

3. From the list in the detail area, choose the appropriate list item, and then do one of the following:

- Either click Select, or from the Row menu, choose Execute to access the menu or application that you chose. If you chose a menu, it appears in the right pane of J.D. Edwards Explorer. If you chose an application, OneWorld starts that application.

- From the Row menu, choose Go to Menu to display the menu that you chose, or if you chose an application, the menu that the application resides on. The appropriate menu appears in the right pane of J.D. Edwards Explorer.

Working with Equivalent Words

With Menu Word Search, you can add, change, or delete from a list of equivalent words. An equivalent word is one that is similar to, but not exactly like, the full name of a menu or application. An equivalent word can be a synonym, an alternative spelling, an alternative phrasing, or any string by which a user is likely to search for a menu or application. For example, the OneWorld application called User Defined Codes is also commonly known by its initials of UDC. If you establish these initials as an equivalent word, you can enter them into the Search Word field on the Menu Word Search form, rather than typing out USER DEFINED CODES. For an equivalent word to work on the Menu Word Search form, it must be in the Word Search Equivalence table (F91011). OneWorld comes with a list of equivalent words, to which you can add your own words.

Equivalent words are categorized by search code and search words. A search code is the highest level. Immediately beneath the search code are search words. You can only add equivalent words to search words. For example, to create UDC as an equivalent word, you must first choose under which search code it will appear. For example, under the 01 (Address

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Book) search code, you need to choose a search word for which you want UDC to be the equivalent. In this example, you would choose USER DEFINED CODES. The hierarchy looks like this:

- Search code, such as 01

  - Search word, such as USER DEFINED CODES

    - Equivalent word, such as UDC

Returning to the Menu Word Search form, to find applications and menus, you must search using the specific search code that you entered for the equivalent word. Using the example above, to find applications and menus using the equivalent word UDC, you would enter the 01 search code. You need to create UDC as an equivalent word under each search code for which you want Menu Word Search to find matches.


Note

You can add or change equivalent words any time that you want, but Menu Word Search will not recognize the changes until a batch process updates the main Menu Word Search table (F91013). Contact your administrator to schedule this batch process, or see *Building the Menu Word Search Table* for information about how to run this process.

► **To view equivalent words**

1. From an Explorer, do one of the following to access the Work With Word Equivalencies form:

   - From the toolbar, click the Word Search button.

     The Menu Word Search form appears. From its Form menu, choose Word Equivalencies.

   - From the Menu Word Search (GH9024) menu, choose Word Search Equivalencies (P95012).

   - On the Work With Ignore Words form, choose Word Equivalence from the Form menu.

2. On Work With Word Equivalencies, type your search criteria in the following fields and click Find:

   - Search Code

     Enter a specific system code, such as 01 for Address Book, or enter and asterisk (*) by itself to display all system codes that are currently in the Word Search Equivalence (F91011) table.

   - Search Word

     Enter the entire string of the "parent" search word. When you add equivalent words, you must state a search word and its word equivalence. Using the Work With Word Equivalencies form, you can only search on the parent search word. For example, if you want to view any equivalent words for USER DEFINED CODES, you must enter USER DEFINED CODES, not UDC, unless you added UDC as a search word and not just as an equivalent.

You can also enter * by itself to display all equivalent words for the system code entered in the Search Code field.

The system code folder displays any equivalent words that exist for the system code and search word that you entered. Use your mouse to expand folders to see the search words and equivalent words beneath.
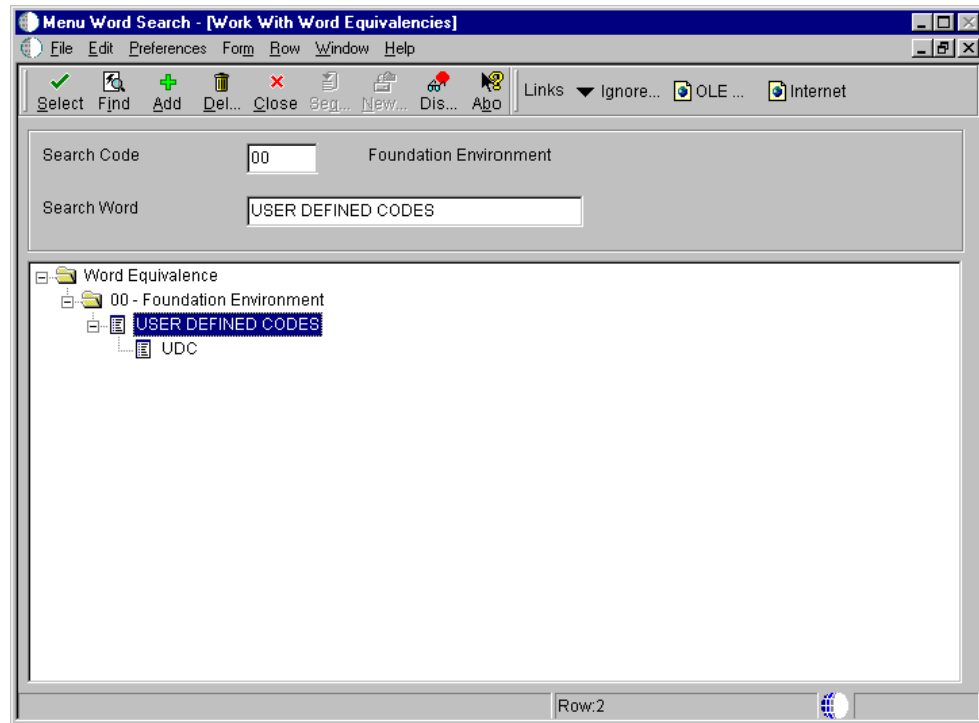
► **To add equivalent words**

1. From an Explorer, do one of the following to access the Work With Word Equivalencies form:

   • From the toolbar, click the Word Search button.

     The Menu Word Search form appears. From its Form menu, choose Word Equivalencies.

   • From the Menu Word Search (GH9024) menu, choose Word Search Equivalencies (P95012).

   • On the Work With Ignore Words form, from the Form menu, choose Word Equivalence.

2. On Work With Word Equivalencies, click Add.

![Menu Word Search - Word Equivalence Revisions form showing Search Code field with value "00" and label "Foundation Environment", Search Word field with "USER DEFINED CODES", and Word Equivalence field with "UDC"](image)

3. On the Word Equivalence Revisions form, complete the following fields and click OK.

   - Search Code

     You must enter a specific system code, such as 01 for Address Book or 00 for the Foundation Environment.

   - Search Word

     Enter the word or phrase (such as USER DEFINED CODES) for which you want to create the equivalent word.

   - Search Word 2

     Enter the equivalent word, such as UDC for USER DEFINED CODES.

   You can now find your new equivalent word on this form, but you cannot use the equivalent word on the Menu Word Search form until the system administrator updates the main Menu Word Search table. See *Building the Menu Word Search Table* for more information about this batch process.

► **To change equivalent words**

1. From an Explorer, do one of the following to access the Work With Word Equivalencies form:

   - From the toolbar, click the Word Search button.

     The Menu Word Search form appears. From its Form menu, choose Word Equivalencies.

- From the Menu Word Search (GH9024) menu, choose Word Search Equivalencies (P95012).

- On the Work With Ignore Words form, choose Word Equivalence from the Form menu.

2. On Work With Word Equivalencies, find the equivalent word that you want to change.

3. Choose the equivalent word and click Select.

   On Word Equivalence Revisions, the Search Code and Search Word fields are grayed out.

4. Complete the following field and then click OK.

- Search Word 2

   Change the equivalent word.

   You can now find your changed equivalent word on this form, but you cannot use the equivalent word on the Menu Word Search form until the system administrator updates the main Menu Word Search table. See *Building the Menu Word Search Table* for more information about this batch process.

► **To delete equivalent words**

1. From an Explorer, do one of the following to access the Work With Word Equivalencies form:

- From the toolbar, click the Word Search button. On Menu Word Search, choose Word Equivalencies from the Form menu.

- From the Menu Word Search (GH9024) menu, choose Word Search Equivalencies (P95012).

- On Work With Ignore Words form, choose Word Equivalence from the Form menu.

2. On Work With Word Equivalencies, find the equivalent word that you want to delete.

3. Choose the equivalent word (not the search word "parent") and click Delete.

   The equivalent word will not be deleted from the main Menu Word Search table until the system administrator updates the table. See *Building the Menu Word Search Table* for more information about this batch process.

Working with Ignored Words

With Menu Word Search, you can add, change, or delete from a list of words that you want OneWorld to ignore if you enter them in the Search Word field by themselves. For example, Menu Word Search already ignores A, ABOUT, and AFTER; if you enter one of these words by itself into the Search Word field, the Menu Word Search application ignores it. This process prevents OneWorld from retrieving too many menus and applications, such as all menus or applications with the word "A" in their title.

Note

You can add or change ignore words at any time, but Menu Word Search will not recognize the changes until a batch process updates the main Menu Word Search (F91013) table. Contact your administrator for the schedule of this batch process or see *Building the Menu Word Search Table* for information about how to run this process.

► **To view ignore words**

1. From an Explorer, do one of the following to access the Work With Ignore Words:

   • From the toolbar, click the Word Search button. The Menu Word Search form appears. From the Form menu, choose Ignore Words.

   • From the Menu Word Search (GH9024) menu, choose Word Search Ignore Words (P95012).

   • On the Work With Word Equivalencies form, choose Ignore Words from the Form menu,

2. On Work With Ignore Words, complete the following field and then click Find:

   • Search Code

     Enter a specific system code, such as 01 for Address Book or 00 for the Foundation Environment. You can use * by itself to display all system codes currently in the Word Search Ignore Word Table (F91012).

   The system code folder displays any ignore words that exist for the system code that you entered. You can expand the folders to see the ignore words beneath Foundation Environment:
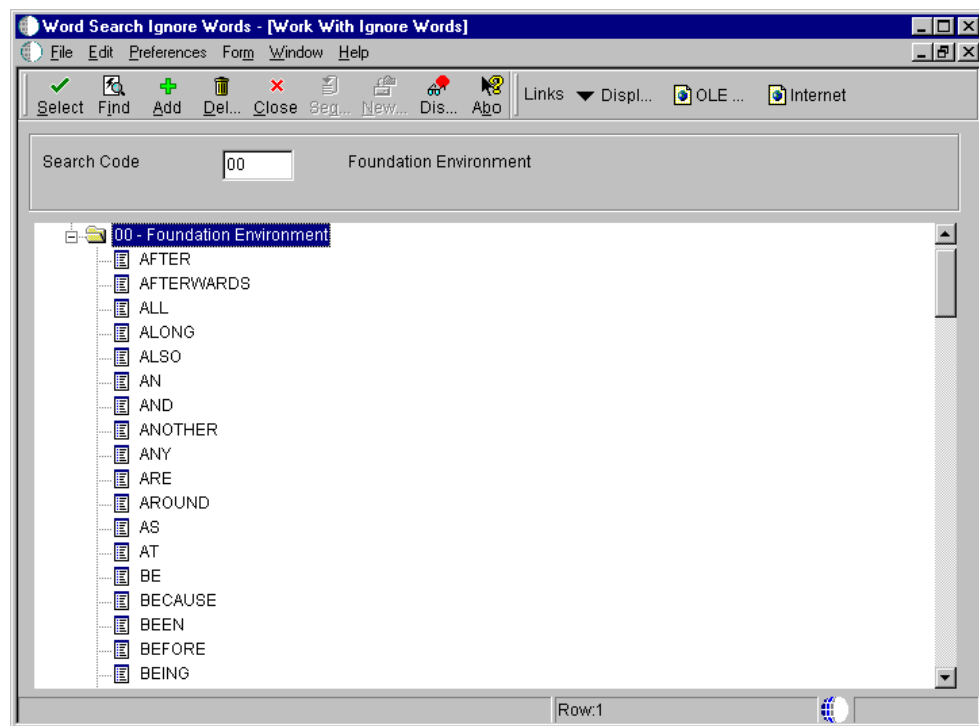
► To add ignore words

1. From an Explorer, do one of the following to access the Work With Ignore Words form:

   - From the toolbar, click the Word Search button. The Menu Word Search form appears. From the Form menu, choose Ignore Words.

   - From the Menu Word Search (GH9024) menu, choose Word Search Ignore Words (P95012).

   - On the Work With Word Equivalencies form, from the Form menu, choose Ignore Words.

2. On Work With Ignore Words, click Add.

3. On the Ignore Word Revisions form, complete the following fields and click OK.

   - Search Code

     You must enter a specific system code, such as 01 for Address Book or 00 for the Foundation Environment.

   - Ignore Word

     Enter the word that you want Menu Word Search to ignore if you enter that word into the Search Word field by itself.

   You can now find the new ignore word on Work With Ignore Words, but Menu Word Search will not ignore this word until the system administrator updates the main Menu Word Search table. See *Building the Menu Word Search Table* for more information about this batch process.

► To change ignore words

1. From an Explorer, do one of the following to access the Work With Ignore Words form:

   - From the toolbar, click the Word Search button. The Menu Word Search form appears. From the Form menu, choose Ignore Words.

   - From the Menu Word Search (GH9024) menu, choose Word Search Ignore Words (P95012).

   - On the Work With Word Equivalencies form, from the Form menu, choose Ignore Words.

2. On Work With Ignore Words, find the ignore word that you want to change.

3. Choose the ignore word and click Select.

   On Ignore Word Revisions, the Search Code field is grayed out.

4. Complete the following field and then click OK.

   - Ignore Word

     Change the ignore word.

   You can now find the changed ignore word on Work With Ignore Words, but Menu Word Search will not ignore this word until the system administrator updates the main

Menu Word Search table. See *Building the Menu Word Search Table* for more information about this batch process.

► **To delete ignore words**

1. From an Explorer, do one of the following to access the Work With Ignore Words form:

   - From the toolbar, click the Word Search button. The Menu Word Search form appears. From its Form menu, choose Ignore Words.

   - From the Menu Word Search (GH9024) menu, choose Word Search Ignore Words (P95012).

   - On the Work With Word Equivalencies form, choose Ignore Words from the Form menu.

2. On Work With Ignore Words, find the ignore word that you want to delete.

3. Choose the ignore word and click Delete.

   The ignore word will not be deleted from the main Menu Word Search table until the system administrator updates this table. See *Building the Menu Word Search Table* for more information about this batch process.

Building the Menu Word Search Master Table

System administrators use the batch process explained in this task to build the Menu Word Search Table (F91013) periodically (for example, once a week). This process updates the main Menu Word Search table with any changes to menus, equivalent words, or ignore words.

Note

This batch process can take several hours to complete.

► **To build the menu word search master table**

1. Sign onto the OneWorld environment that points to your pristine or publisher copy of your menus (such as PROD ADMIN). This environment would typically map your menus to the data source "Control Tables - Production," where the Menu Word Search master table resides. Only use an environment that points to your local workstation if you have very recently installed OneWorld. Otherwise, you could be building from out-of-date menus.

2. On System Administration Tools (GH9011), choose Batch Versions (P98305).

   On Work With Batch Versions - Available Versions, you can locate and run batch processes.

3. Type R95012 into the Batch Application field, which is the name of the batch process that updates the Menu Word Search table.

4. Click Find to locate the versions that are available on your workstation.

5. In the grid, choose version XJDE0001, Build Menu Word Search Table, and click Select.

The Version Prompting form appears. You can submit your job without selecting any options on Version Prompting. However, if you want, from Version Prompting, you can specify Data Selection and Data Sequencing, and access the Advanced Version Prompting form.

6. Click Submit to send your job to the report processing location. If you choose any options on Version Prompting, forms appear that allow you to modify your report before processing.

7. On the Processing Options form, complete the following field:

- Clear Word Search Tables

  Enter 1 to clear the Menu Word Search table before you rebuild it (a recommended procedure), enter 0, or leave the field blank so that the table is not cleared. Make sure that you have a backup of the table before you clear it.

The system takes the menu information from the Object Configuration Management mappings on the environment that you are signed onto and populates the Menu Word Search table.

This process can take several hours.

See Also

- ❏ *Batch Versions for Reports*
- ❏ *Object Configuration Manager* in the *Configurable Network Computing Implementation* documentation

Accessing the Internet

J.D. Edwards Explorer provides access to the Internet through a link in the Tools menu.

► **To access the Internet from J.D. Edwards Explorer**

On J.D. Edwards Explorer, from the Tools menu, choose Internet.

J.D. Edwards Portal Overview

The J.D. Edwards Portal is a configurable gateway to J.D. Edwards software and other applications as well as to the Internet. You can use the Portal to launch J.D. Edwards applications or other programs, perform Internet and intranet searches, and to access other information. The look of the Portal is completely configurable. You can change the Portal and its components so that it looks like the rest of your company's web pages. Access to the Portal and to its resources is governed by J.D. Edwards software security and is based on roles and user IDs.

You can access the J.D. Edwards Portal either through your computer or through a variety of hand-held devices.

Note

You must be licensed to run J.D. Edwards software on a thin client browser before you can receive the J.D. Edwards Portal.

Portal Interface

The J.D. Edwards Portal provides a Web-based framework in which you can manipulate components. A component is any element in the workspace of the Portal and can include a calendar, your e-mail, your work center, national news headlines, and so forth. You can use your PC to view the Portal, or you can use a handheld device that uses Pocket PC or Windows CE. The interface for each of these environments varies; furthermore, the Pocket PC environment does not support full Portal functionality.

Note

If you are using Microsoft Internet Explorer version 6 to view the Portal, you must turn on support for session cookies in Microsoft Internet Explorer before you launch the Portal.

Portal PC Interface

The PC interface for the J.D. Edwards Portal features two toolbars and a workspace area. The system displays workspaces in the workspace area, and it displays components within workspaces.

Toolbars

The top area of the Portal contains two toolbars. The upper toolbar is the Enterprise Navigation Bar. It contains icons (buttons) or hyperlinks that are configured by your system administrator for enterprise-wide navigation. For example, the buttons can provide access to different areas of your company's Web site, other areas within the Portal, or other sites on the World Wide Web. You can choose to display the Enterprise Toolbar Buttons as icons, text, or icons and text. The Enterprise Navigation Bar might also contain an Internet Search Tool. Use User Preferences to hide or show the Internet Search Tool and to select a search engine.

The lower toolbar is the Workspace Navigation Bar. It displays the name of the current workspace. Additionally, the Workspace Navigation Bar might contain a workspace chooser, a role chooser, and a set of Portal- and workspace-related links. A special component type, link components, can be added to the Workspace Navigation Bar to provide hyperlinks in addition to the default hyperlinks provided by the Portal. You can display the workspace chooser either as a drop-down field or as a set of tabs across the bottom part of the Workspace Navigation Bar.

Both toolbars might vary, depending on the current workspace and on how your system administrator configures it and your access to the Portal.

► **To configure the Enterprise toolbar buttons**

1. Click Personalize on the Secondary Navigation Bar.

   If you do not see the Personalize hyperlink, your account probably has not been configured to allow you access to this feature. Contact your system administrator for assistance.

2. On Personalize, click User Preferences.

3. On Display Preferences, for Enterprise Navigation Bar Icon Display, choose how you want to display the buttons and click OK.

► **To hide or show the Internet search tool**

1. Click Personalize on the Secondary Navigation Bar.

   If you do not see the Personalize hyperlink, your account probably has not been configured to allow you access to this feature. Contact your system administrator for assistance.

2. On Personalize, click User Preferences.

3. On Display Preferences, perform one of the following tasks:

   a. To hide the Internet search tool, ensure that Show is not selected, and then click OK.

   b. To show the Internet search tool, click Show and complete the following steps.

      i. Click Personalize Search to configure the tool.

      ii. On Internet Search Preferences, choose one of the search engine options, or specify a different engine by clicking Custom and completing the following fields:

         • Title

           You can give the search engine any title you wish. This title appears next to the Internet Search Tool field on the Enterprise Navigation Bar.

         • Search Home URL

           Enter the URL of the home page for the search engine.

         • Search Query URL

           Enter the URL that the search engine uses for normal searches. To find this URL, verify that the Address Bar is showing in your Web browser, and then go to the search engine home page. Perform a normal search. The URL that appears in the address bar is the search query URL plus the text string you asked to search on (for example, a normal search in yahoo.com for J.D. Edwards renders the following URL:

`http://search.yahoo.com/bin/search?p=J.+D.+Edwards`).
Delete the text string you searched on and copy the rest of the URL (for
example: `http://search.yahoo.com/bin/search?p=`). This is the
URL you must place in the Search Query URL field.

   iii. Click OK.

   iv. On Display Preferences, click OK.

▶ To configure the workspace chooser

1. Click Personalize on the Secondary Navigation Bar.

   If you do not see the Personalize hyperlink, your account probably has not been
   configured to allow you access to this feature. Contact your system administrator for
   assistance.

2. On Personalize, click User Preferences.

3. On Display Preferences, for Workspace Selection Display Type, choose Dropdown to
   display the chooser as a drop-down menu or choose Tabs to display the chooser as
   a set of tabs.

4. Click OK.

Workspace Area

Most of the Portal interface space is devoted to the workspace area: the area in which the
Portal displays workspaces. You can create several workspace layouts to logically group
components. For example, you might have one workspace for a variety of news and stock
information and another workspace for accessing your company's accounting systems. You
can configure your private workspaces to show one or more components arranged in one to
five columns. You can switch between workspaces by using the workspace chooser on the
Workspace Navigation Bar.

Workspaces that you create are private; only you can see them. Your system administrator
can create system-wide workspaces. You might not be able to modify these system-wide
workspaces. Furthermore, your system administrator can assign one or more roles in the
system to you. Your role determines in part which Enterprise Navigation Bar buttons,
workspaces, and components you can see.

Components

Most workspaces display several components at once. Components have their own
properties and can be viewed in several modes. Most components have a toolbar at the top
that displays the component's title and includes two or more buttons. These buttons allow you
to change the component mode. The component modes are:

Restore   In restore mode, the component can be viewed in a box in the workspace. Other
components (if they exist) can be viewed in the workspace as well. Restore mode
usually provides a small amount of content that fits into its portion of the workspace.
For example, an e-mail component might display the subjects of your first five pieces
of new mail, and a weather component might display a map with temperatures.

Restore mode is the default mode of all components. If a component is in another
mode, you can return it to normal mode by clicking the double-box icon on the
component toolbar.

Minimize   In minimize mode, only the component's toolbar is visible. If you have a large number
of components in your workspace, you might want to minimize some to give others

	more space. To view a component in minimize mode, click the line icon on the toolbar. To return to restore mode, click the double-box icon on the toolbar.
Maximize	In maximize mode, the component fills the entire workspace. If the component contains a large amount of content, it might be easier to work with it in this mode. In this mode, some components might display additional features. Not all components have this mode available. To view a component in maximize mode, click the single-box icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.
Help	In help mode, the component fills the entire workspace, displaying information about the component. Not all components have this mode available. To view a component in help mode, click the question mark icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.
Personalize	In personalize mode, the component fills the entire workspace. The tasks that you can perform in this mode vary based on the component. You might be able to add or remove links from the component, for example. Not all components have this mode available. To view a component in personalize mode, click the arrow icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.

Most components have a restore, minimize, and maximize mode. Help and personalize modes are available only if the designer of the component enabled them.

Portal Windows CE Interface

The Windows CE interface for the J.D. Edwards Portal features two toolbars and a workspace area. The system displays workspaces in the workspace area, and it displays components within workspaces.

Toolbars

The top area of the Portal contains two toolbars. The upper toolbar is the Enterprise Navigation Bar. It contains icons (buttons) or hyperlinks that are configured by your system administrator for enterprise-wide navigation. For example, the buttons can provide access to different areas of your company's Web site, other areas within the Portal, or other sites on the World Wide Web.

The lower toolbar is the Workspace Navigation Bar. It displays the name of the current workspace. Additionally, the Workspace Navigation Bar might contain a workspace chooser, a role chooser, and a set of Portal- and workspace-related links. A special component type, link components, can be added to the Workspace Navigation Bar to provide hyperlinks in addition to the default hyperlinks provided by the Portal.

Both toolbars might vary, depending on the current workspace and on how your system administrator configures it and your access to the Portal.

► **To configure the Enterprise toolbar buttons**

1. Click Personalize on the Secondary Navigation Bar.

   If you do not see the Personalize hyperlink, your account probably has not been configured to allow you access to this feature. Contact your system administrator for assistance.

2. On Personalize, click User Preferences.

3. On Display Preferences, for Enterprise Navigation Bar Icon Display, choose how you want to display the buttons and click OK.

Workspace Area

Most of the Portal interface space is devoted to the workspace area: the area in which the Portal displays workspaces. You can create several workspace layouts to logically group components. For example, you might have one workspace for a variety of news and stock information and another workspace for accessing your company's accounting systems. You can configure your private workspaces to show one or more components arranged in one to five columns. You can switch between workspaces by using the workspace chooser on the Workspace Navigation Bar.

Workspaces that you create are private; only you can see them. Your system administrator can create system-wide workspaces. You might not be able to modify these system-wide workspaces. Furthermore, your system administrator can assign one or more roles in the system to you. Your role determines in part which Enterprise Navigation Bar buttons, workspaces, and components you can see.

Components

Most workspaces display several components at once. Components have their own properties and can be viewed in several modes. Most components have a toolbar at the top that displays the component's title and includes two or more buttons. These buttons allow you to change the component mode. The component modes are:

Restore
In restore mode, the component can be viewed in a box in the workspace. Other components (if they exist) can be viewed in the workspace as well. Restore mode usually provides a small amount of content that fits into its portion of the workspace. For example, an e-mail component might display the subjects of your first five pieces of new mail, and a weather component might display a map with temperatures.

Restore mode is the default mode of all components. If a component is in another mode, you can return it to normal mode by clicking the double-box icon on the component toolbar.

Minimize
In minimize mode, only the component's toolbar is visible. If you have a large number of components in your workspace, you might want to minimize some to give others more space. To view a component in minimize mode, click the line icon on the toolbar. To return to restore mode, click the double-box icon on the toolbar.

Maximize
In maximize mode, the component fills the entire workspace. If the component contains a large amount of content, it might be easier to work with it in this mode. In this mode, some components might display additional features. Not all components have this mode available. To view a component in maximize mode, click the single-box icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.

Help
In help mode, the component fills the entire workspace, displaying information about the component. Not all components have this mode available. To view a component in help mode, click the question mark icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.

Personalize
In personalize mode, the component fills the entire workspace. The tasks that you can perform in this mode vary based on the component. You might be able to add or remove links from the component, for example. Not all components have this mode available. To view a component in personalize mode, click the arrow icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.

Most components have a restore, minimize, and maximize mode. Help and personalize modes are available only if the designer of the component enabled them.

Portal Pocket PC Interface

The Pocket PC interface for the J.D. Edwards Portal features one toolbar and a workspace area. The system displays workspaces or components in the workspace area.

Toolbar

The top area of the Portal contains a toolbar consisting of a drop-down field. Click the drop-down menu to access different workspaces or to log off.

Workspace Area

Most of the Portal interface space is devoted to the workspace area: the area in which the Portal displays workspaces and components. When you first log on, a workspace is displayed in the workspace area. It appears as one or more hyperlinks. The hyperlinks are components. Click a component to display it.

You cannot create or configure workspaces with the Pocket PC interface.

Components

Most workspaces display several components at once. Components have their own properties and can be viewed in several modes. Most components have a toolbar at the top that displays the component's title and includes two or more buttons. These buttons allow you to change the component mode. The component modes are:

Restore	In restore mode, the component can be viewed in a box in the workspace. Other components (if they exist) can be viewed in the workspace as well. Restore mode usually provides a small amount of content that fits into its portion of the workspace. For example, an e-mail component might display the subjects of your first five pieces of new mail, and a weather component might display a map with temperatures.
	Restore mode is the default mode of all components. If a component is in another mode, you can return it to normal mode by clicking the double-box icon on the component toolbar.
Minimize	In minimize mode, only the component's toolbar is visible. If you have a large number of components in your workspace, you might want to minimize some to give others more space. To view a component in minimize mode, click the line icon on the toolbar. To return to restore mode, click the double-box icon on the toolbar.
Maximize	In maximize mode, the component fills the entire workspace. If the component contains a large amount of content, it might be easier to work with it in this mode. In this mode, some components might display additional features. Not all components have this mode available. To view a component in maximize mode, click the single-box icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.
Help	In help mode, the component fills the entire workspace, displaying information about the component. Not all components have this mode available. To view a component in help mode, click the question mark icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.
Personalize	In personalize mode, the component fills the entire workspace. The tasks that you can perform in this mode vary based on the component. You might be able to add or

remove links from the component, for example. Not all components have this mode available. To view a component in personalize mode, click the arrow icon on the component toolbar. To return to restore mode, click the double-box icon on the toolbar.

Most components have a restore, minimize, and maximize mode. Help and personalize modes are available only if the designer of the component enabled them.

Accessing the J.D. Edwards Portal

▶ **To log into the Portal**

1. Launch a Web browser such as Netscape Navigator or Microsoft Internet Explorer.

   Note

   Your company may have its own method for users to access the Portal, such as a desktop shortcut.

2. Enter the Portal's URL and press Enter.

   If you do not know what the Portal's URL is, contact your system administrator.

   Alternatively, you can also enter your ID, password, and environment directly into the URL to bypass the login form. For example, if the URL for the Portal was:

   ```
   http://localhost/jde/servlet/com.jdedwards.portal
   ```

   you could instead enter:

   ```
   http://localhost/jde/servlet/com.jdedwards.portal.PortalBui
   lderServlet?User=MYUSERID&Password=MYPASSWORD&Environmen
   t=MYENVIRONMENT
   ```

   where

   MYUSERID = your user ID

   MYPASSWORD = your password

   MYENVIRONMENT = the environment you want to access

   This method of logging in is called parameter-based login.

3. On the J.D. Edwards software login form, enter your user ID, password, and environment, and then click Sign On.

   If you leave the environment field blank, the system provides a list of environments for you to choose from when you click Sign On.

► To log out of the Portal

Click Logout in the Workspace Navigation Bar.

Portal Workspaces

If your system administrator has granted you the ability to personalize workspaces, you can add new workspaces to the Portal.

The workspace that you create is not public; that is, only you can see it. However, you can grant other individuals the following kinds of rights to your workspace:

- View

  Individuals who have View rights can see your workspace and personalize the appearance on their workstations. They cannot affect the workspace in any other way.

- View/Edit

  Individuals who have View/Edit rights can view and make changes to the workspace.

- View/Edit/Grant Permissions

  Individuals who have View/Edit/Grant Permissions rights can view and change the workspace, and can also grant rights to other individuals.

You can personalize your workspaces. From the Personalize form, you can change the following characteristics for a workspace:

- Workspace unique ID (Workspace Name)
- Environments in which the workspace can appear (PC, Windows CE, Pocket PC)
- Title
- Components (add, remove, rearrange)
- Columns (add, remove)
- Workspace Navigation Bar links
- Colors
- Background image
- Toolbar logo and background image
- Access privileges

To personalize a workspace, you must have a View/Edit rights to the workspace. You alone are granted View/Edit/Grant Permissions rights automatically with any workspace you create. You might not have access privileges to some public workspaces.

► To create a new workspace

You can create an original workspace (one that is not based on another workspace), or you can create a workspace that is based on another workspace.

1. Click Personalize on the Secondary Navigation Bar.

    If you do not see the Personalize hyperlink, your account probably has not been configured to allow you access to this feature. Contact your system administrator for assistance.

2. On Personalize, perform one of the following:

    a. To create an original workspace, click Add Workspace.

    b. To create a workspace that is based on another workspace, choose a workspace from the Select Workspace field on the Workspace Navigation Bar, and then click Copy Workspace.

    Note

    When you copy a workspace, the system does not copy any links associated with the workspace. If you want the new workspace to contain the same links as the workspace on which it is based, you must recreate them.

3. Complete the following fields in the Current Workspace section of the form:

    *   Workspace Name

        This is the name of the workspace as it appears in the workspace chooser on the Workspace Navigation Bar. You should limit your workspace name to 50 characters.

    *   Devices

        Choose in which form factors the new workspace should be available. Choose HTML 4.0 to make the workspace available to PC environments; click one or more of the other choices to make the workspace available to devices that use Windows CE.

    Note

    Making a workspace available to a particular device does not guarantee that all of its components will work properly on that device. A component that includes features that are not supported by a particular device will not function correctly on that device.

    *   Page Title

        This text appears on the bottom right side of the Workspace Navigation Bar when the workspace is being viewed.

    *   Workspace ID

        This name is the system name for the workspace.

    Caution

    All J.D. Edwards workspaces follow this convention: jde*xxxxxxx*. Do not use the J.D. Edwards convention to name your workspaces. Any Portal element

(workspaces, components, and so forth) beginning with the characters jde might be overwritten when the system is upgraded.

4. Format the workspace as desired by adding or removing columns and components, changing colors, and defining different URLs to use for Portal elements.

   See *To change how a workspace looks* and *To change the layout of a workspace* for instructions for making these changes.

5. Click OK.

   If you make changes to several areas of the form, clicking OK in any section saves the changes made to all sections.

   To cancel your changes, click the Portal hyperlink on the Workspace Navigation Bar instead of OK.

► **To change how a workspace looks**

1. From the Portal, click Personalize on the Workspace Navigation Bar.

   If you do not see the Personalize hyperlink, your account probably has not been configured to allow you access to this feature. Contact your system administrator for assistance.

2. Choose a workspace from the Select Workspace field on the Workspace Navigation Bar.

3. To change the name or title of the workspace or to change on which devices the workspace should be available, change the corresponding fields in the Current Workspace section of the form.

   For more information about these fields, see *To create a new workspace*.

4. To change the colors of different Portal elements, click *Color Scheme Appearance* in the Workspace Details section of the form and perform the following actions:

   a. To choose a color scheme to set all of the Portal elements to different but compatible colors and textures, select a color scheme from the Predefined Schemes drop-down field in the Choose a Scheme for Your Workspace section.

      If you vary the colors or logos of any of the elements in the other sections on this page, you can return to the default values for the scheme by clicking Select (the button next to the Predefined Schemes drop-down field that looks like two right-pointing arrows).

   b. To choose a color for a specific Portal element, perform either of the following tasks in the Modify Workspace Scheme Colors section.

      The colors you choose in this section override your current color scheme, but will be lost if you choose a different color scheme.

      i. For a given element, click a color on its Color Palette.

      ii. For a given element, enter a hexadecimal value in the # field in the New Color column. Click Preview to render the hexadecimal color.

   c. To return an element to the color specified by the current color scheme, click Reset.

When you choose different options (in any section of the page), the system reflects your choices in the Scheme Preview in the Choose a Scheme for Your Workspace section.

5. To use different images for the workspace's background, logo, and toolbars, enter an appropriate URL in the applicable fields in the Modify Workspace Images and Links section of the page.

   When you choose different options (in any section of the page), the system reflects your choices in the Scheme Preview in the Choose a Scheme for Your Workspace section.

6. When you are finished, click OK.

   If you make changes to several areas of the page, clicking OK in any section saves the changes made to all sections.

7. To cancel your changes, click Cancel in any section of the page.

► **To change the layout of a workspace**

In the following task, if you do not see a particular option, your account probably has not been configured to allow you access to the feature in question. Contact your system administrator for assistance.

1. Click Personalize on the Workspace Navigation Bar.

2. On Personalize, choose a workspace from the Select Workspace field on the Workspace Navigation Bar.

3. In the Workspace Layout Design section of the form, change the number of columns by performing any of the following steps. All buttons are located under the Workspace Layout graphic. When you hover over a button, its title appears in the box between the Workspace Layout graphic and the buttons.

   a. Click *Add a new column* to add a new column to the workspace.

      New columns are added to the right. Workspaces can contain 1-5 columns.

   b. Choose a column and then click *Delete the highlighted column* to remove the column you chose from the workspace.

      If you delete a column with components in it, the components are removed from the workspace only. You cannot use the Personalize form to delete components from the system.

   c. Click *Reset to 3 empty columns* to clear all components and to create three equally-sized columns.

4. To change the width of a column, drag the column dividers to the right and left.

   If a component's width is wider than the column width that you set, the system overrides your column settings to accommodate the component.

5. Add, remove, and rearrange components in the workspace by performing any of the following steps:

   a. To add a component to a column, choose a column, choose the component that you want to add, and click the right-pointing arrow between the Available Components list and the Workspace Layout graphic.

b. To remove a component from a column, choose the component that you want to remove and click the left-pointing arrow between the Available Components list and the Workspace Layout graphic.

c. To move a component on the Workspace Layout to a different column, choose the component that you want to move and click the right- or left-pointing arrow below the Workspace Layout graphic, or drag and drop the component to a new location.

d. To move a component on the Workspace Layout above or below other components in the column, choose the component that you want to move and click the up- or down-pointing arrow below the Workspace Layout graphic, or drag and drop the component to a new location.

6. To list the components by their IDs instead of by their names, click Sort by IDs.

7. When you are finished, click OK.

    If you make changes to several areas of the form, clicking OK in any section saves the changes made to all sections.

► **To alter hyperlinks on the Workspace Navigation Bar for a workspace**

Component developers can make a special kind of component called a link component. When you add link components to the Workspace Navigation Bar, they appear as additional hyperlinks.

In the following task, if you do not see a particular option, your account probably has not been configured to allow you access to the feature in question. Contact your system administrator for assistance.

1. From the Portal, click Personalize on the Workspace Navigation Bar.

2. On the Workspace Navigation Bar, choose a workspace from the Select Workspace field.

3. In the Workspace Details section, click Workspace Navigation Bar Links.

4. Add, remove, and rearrange links by performing any of the following tasks:

    a. To add a link to the Workspace Navigation Bar, choose the link component that you want to add, and click the right-pointing arrow between the Available list and the Selected list.

    b. To remove a link from the Workspace Navigation Bar, choose the link that you want to remove and click the left-pointing arrow between the Available list and the Selected list.

    c. To rearrange the order of the links, choose the link that you want to move and click Move Up or Move Down.

5. To list the components by their IDs instead of by their names, click Sort by IDs.

6. When you are finished, click OK.

► **To delete a workspace**

You can delete any workspace that you create. However, when you delete a workspace, you do not delete its components from the system.

1. Click Personalize on the Workspace Navigation Bar.

   If you do not see the Personalize hyperlink, your account probably has not been configured to allow you access to this feature. Contact your system administrator for assistance.

2. On Personalize, choose a workspace from the Select Workspace field on the Workspace Navigation Bar.

3. In the Current Workspace section of the form, click Delete Workspace.

   The system confirms the deletion.

4. Click Yes when the system asks if you really want to delete the workspace.

Incorporating Your Corporate Theme

You can alter a single workspace or the entire J.D. Edwards Portal to match the look and feel of an existing page or site. Changes you make to the jas.ini or portal.css files are global. Changes you make on the Personalize form override the global settings but are applied only to the current workspace.

► **To incorporate your corporate theme**

1. From the Portal, click Personalize on the Workspace Navigation Bar.

   If you do not see the Personalize hyperlink, your account probably has not been configured to allow you access to this feature. Contact your system administrator for assistance.

2. On Personalize, choose a workspace from the Select Workspace field on the Workspace Navigation Bar.

3. To change the background for the workspace area, perform one of the following processes:

   • To change the color, in the Workspace Look & Feel section, click the checkbox next to Workspace Background Color field, and perform one of the following processes:

      • Click a color on the Color Palette, and then click the paintbrush icon under the Color Palette.

      • Enter the hexadecimal value of a color in the Color Code field, and then click the paintbrush icon next to the value you entered.

   • To display an image in the workspace area, enter the URL of the image to display in the Workspace Background Image URL field in the Additional Personalization section of the form.

      Depending on the size of the image, the Portal might tile it. To remove a background image, delete the contents of this field.

4. To change the background for the Enterprise Navigation Bar, perform one of the following processes:

- To change the color, in the Workspace Look & Feel section, click the checkbox next to Enterprise Navigation Bar Background Color field, and perform one of the following processes:

  - Click a color on the Color Palette, and then click the paintbrush icon under the Color Palette.

  - Enter the hexadecimal value of a color in the Color Code field, and then click the paintbrush icon next to the value you entered.

- To display an image in the Enterprise Navigation Bar, enter the URL of the image to display in the Enterprise Navigation Background Image URL field in the Additional Personalization section of the form.

  Depending on the size of the image, the Portal might tile it. To remove a background image, delete the contents of this field.

5. To change the logo on the Enterprise Navigation Bar, enter the URL of the image in the Enterprise Navigation Logo Image URL field in the Additional Personalization section of the form.

   For best results, the referenced image should be between 100-120 pixels wide and 25-35 pixels tall.

   To use your logo as the default logo in all Portal workspaces, change the corplogourl setting in the [PORTAL] section of the jas.ini file to point to the image you want to use.

   To make the logo a clickable link, enter a target URL in the Enterprise Navigation Logo Link URL field. When the user clicks on the logo, the target URL appears.

6. To change the colors of different Portal elements, perform one of the following actions in the Workspace Look & Feel section of the form:

   - Select a color scheme from the drop-down menu.

     You can create a selectable color scheme based on your company's colors. These custom schemes are stored in the jas.ini file.

   - Click a color on the Color Palette, click the checkbox next to one or more elements that you want to change, and then click the paintbrush icon under the Color Palette to apply the color to the selected elements.

   - Enter the hexadecimal value of a color in the Color Code field, click the checkbox next to one or more elements that you want to change, and then click the paintbrush icon next to the value you entered to apply the color to the selected element.

7. To change font types, sizes, colors, and related elements, modify the Portal style sheet (portal.css).

   Changes to the Portal's style sheet are reflected in the entire Portal, not just the current workspace.

Caution

Changing a web page's style sheet can drastically alter the appearance of the page. For example, increasing a font's point size might displace or obscure some page elements. If you change the style sheet, make a note of your changes and test each one so you can revert to the previous setting if a change has a negative impact.

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8. When finished, click OK.

    If you make changes to several areas of the form, clicking OK in any section saves the changes made to all sections.

    To cancel your changes, click the Portal hyperlink on the Workspace Navigation Bar instead of OK.

Using the Link Center Component

Depending on your J.D. Edwards Portal configuration, you might have access to the Link Center component. You can use this component to organize and display any hyperlinks you want to add to your Portal.

Links appear under user-defined categories.

► To configure the Link Center component

1. On the Link Center component, click Personalize.
2. On Personalize Link Center, in the Options section, complete the following fields:

    -   Show all categories open

        Click this option to display all links under each category as the default view. If not selected, the component displays the categories only initially, and then you most open the categories manually to display their contents.

        Note

        Not all browsers support this option.

    -   Show URL with link

        Click this option to display the URL next to your name for the link.

3. Click Apply Changes.
4. Click Normal on the component toolbar to return to your normal workspace view.

► To add links

1. On the Link Center component, click Personalize.
2. On Personalize Link Center, click Add Link.
3. On Add Link, complete the following fields:

    -   Category

        Choose the category under which you want the hyperlink to appear. See *To add categories* for information on how to add a new category to the list.

    -   Description

        Enter the text that you want to appear in the Link Center so you can identify the hyperlink.

    -   URL

Choose the correct protocol from the drop-down list, and then enter the remainder of the URL in the following field. For example, to specify a link to http://www.jdedwards.com/, you select http:// from the drop-down list, and then you enter www.jdedwards.com/.

- Target

  Choose one of the following four options:

  - This Window

    Choose this option to leave the Portal and display the target in your Web browser.

  - New Window

    Choose this option to display the target in a new Web browser window, leaving the J.D. Edwards Portal in the original window.

  - Portal

    This option replaces the component area with the target. You remain in the Portal, so the component and Portal toolbars are available. Use this option for sites that use fully-qualified URLs.

  - Portal in Frame

    This option replaces the component area with the target. You remain in the Portal, so the component and Portal toolbars are available. Use this option for sites that do not use fully-qualified URLs.

  The option you choose is represented with an icon in the Target field on Personalize Link Center.

4. Click Save to save the link in the component and return to Personalize Link Center. Click Save & Add New to save the link in the component and add another link.

5. Click Normal on the component toolbar to return to your normal workspace view.

► **To add categories**

1. On the Link Center component, click Personalize.

2. On Personalize Link Center, click Add Category.

3. On Add a Category, complete the following fields:

   - Category Name

     Enter text to identify the name of the category.

   - Category Color

     Choose a color that you want to use for the display of the category name.

4. Click Save to save the category and return to Personalize Link Center. Click Save & Add New to save the category and add another category.

5. On the component toolbar, click Normal to return to your normal workspace view.

▶ To change links or categories

1. On the Link Center component, click Personalize.

2. On Personalize Link Center, click the edit icon next to the element you want to modify.

3. Modify the element as desired.

4. Click Save to save your changes and return to Personalize Link Center. Click Save & Add New to save your changes and add a new element.

5. On the component toolbar, click Normal to return to your normal workspace view.

▶ To delete links or categories

1. On the Link Center component, click Personalize.

2. On Personalize Link Center, click the delete icon next to the element you want to delete.

   The system verifies the deletion.

3. On the component toolbar, click Normal to return to your normal workspace view.

Using the Task Explorer Component

Depending on your Portal configuration, you might have access to the Task Explorer component. The Task Explorer component displays the Solution Explorer task views that you have access to. Additionally, this component might include the Fast Path utility, which lets you move quickly among task views and tasks using fast path commands.

Note

If you have used or are using the J.D. Edwards Explorer, your system administrator must run the R9000C batch application from the Task Explorer component to work properly. See the *Solution Explorer Implementation* documentation for more information

Opening Menus and Applications in Portal

In the Task Explorer component, a task view is a hierarchical list of various J.D. Edwards software items such as applications and reports. You navigate through task views to locate and perform tasks such as launching an application and processing a report. Portal provides several methods of finding and displaying menus.

You can also open menus and applications using Fast Path. See *Using Fast Path* for more information.

Understanding the Task View Tree Structure

J.D. Edwards software tasks such as applications and reports are grouped hierarchically in task views. If a plus (+) sign appears to the left of a task, you can expand the task to show any tasks that have been grouped under it. If there is no plus sign to the left of a task, the task is expanded. Click the Up menu button to return to the previous task level. Click the Top menu button to return to the top of the task view.

Tasks can be linked to a specific group of tasks in a task view. A task with an available link has a red link icon on top of the regular task icon. Click the linked task to quickly move from your current position in the task view to the position designated by the link.

The task view tree structure also gives you the option to save a task to your Favorites task view and choosing versions and values for applicable tasks. When you first open a task view, a heart icon appears to the right of every task. Click the heart icon to send the task to your Favorites task view. For applications that contain different versions, a gear icon appears to the right of the task. Hover over the gear icon to set values, select a version, or define data selection when available. You can click Hide at the top of the task view tree structure to hide the heart and gear icons. If the icons are hidden, you can click Show to display them.

Launching Applications in a Task View

Tasks can launch an application or submit a report when you click on them. To activate a software task, click the task text.

Some tasks allow you to set values, select a version, or define data selection. To set these variables, hover over the gear icon to the right of the task, and then select the option that you want. Options that cannot be selected for that task are disabled.

Working with Task Views

In the Task Explorer component, you can access J.D. Edwards software menus and applications through different task views. Task views in the Task Explorer component contain task relationships that represent the processes necessary to complete specific jobs. In a task view, a task might launch an application or display a series of other tasks.

To launch a specific task view, choose a task view from the Task View field.

Note

Your system administrator determines which task views you can access.

See Also

❑ *Solution Explorer Implementation* documentation for a description of other administrative views

❑ *Opening Menus and Applications in Portal* for instructions on manipulating the menus and launching applications in task views

Using the OneWorld Menus Task View

The OneWorld Menus task view contains the suite of J.D. Edwards software applications arranged in a tree structure. Your system administration determines if you have access to this view.

Using the End-User Tasks Task View

The End-User Tasks task view contains menus based on the role or roles of the particular user. For example, a user is assigned to the role of purchasing clerk. The role-based menu that appears for the purchasing clerk contains only the menu items that the clerk needs to perform purchasing-related tasks.

When you open the End-User Tasks task view, your default role is applied to the view. If you have more than one role, you can apply another role to the view and change the displayed tasks.

Your role (or roles) and, therefore, the tasks that you can see in this view are set by the system administrator.

► **To apply a role to a task view**

1. In the End-User Tasks task view, click Apply Role.

   The Apply Role form appears listing the roles that you have access to.

2. Click the role that you want to apply to the view.

Using the Favorites Task View

The Favorites task view displays the tasks that you use most frequently. This view provides quick and easy access to your most-used tasks from one convenient location. You can add existing tasks to your Favorites task view by clicking the heart icon to the right of any task. To remove a task from your Favorites view, click the X to the right of the task. Deleting a task from your Favorites view does not delete the task from the system.

Unlike the other task views, the changes you make to the Favorites task view appear immediately and do not require system administrator intervention.

Using Fast Path - Portal

Fast Path is a utility that provides direct access to a task view or an application by entering a fast path command. Your system administrator determines whether you have access to Fast Path. Once you become more familiar with the fast path commands, you might find that fast path is a quicker way to access a task view or an application, instead of navigating through menus.

A fast path command can be any of the following items:

- An abbreviation that is either shipped with J.D. Edwards demo data or which you define to suit your business environment. For example, the fast path *OMW* might take you to the Object Management Workbench application so you can work with J.D. Edwards software objects.

- A task ID.

- An application ID.

To specify a version, enter the application ID followed by | (logical OR bar) and then the version ID. For example: P01012|ZJDE0003 displays the ZJDE0003 version of the Work with Addresses application. You can also specify the form in a version to open by placing the form number between the application and version IDs, such as P01012|W01012B|ZJDE0003.

J.D. Edwards Web Client

J.D. Edwards Web Client is the Web-based gateway to J.D. Edwards software applications and reports. J.D. Edwards Web Client does the following:

- Uses menus as the basis of navigation throughout J.D. Edwards software. These menus display icons with text to represent J.D. Edwards software.

- Allows you to use fast path commands to quickly access a menu or application.

- Includes a Tools pull-down menu that provides access to additional features.

Signing On and Off J.D. Edwards Web Client

The first time that you access the Web Server, the system caches files into the browser's cache directory on your workstation. Therefore, the next time that you log on using the same workstation, many files are already loaded.

To sign on to J.D. Edwards Web Client, you must enter a user ID and password on the Sign On form. User IDs define the following information for each user:

- Security and permissions

- Initial menu

- Language and currency symbol

- Display preferences

On this form, you can also choose the environment in which you work. The system administrator sets up your environment for you. Typically, you will need to work in only one environment.

► To sign on to J.D. Edwards Web Client

The system administrator has several choices of how your system is set up for signing on to J.D. Edwards Web Client. For example, the system administrator might have you sign on using a URL, clicking on an icon, or using a favorites folder in your browser.

1. To sign on to J.D. Edwards Web Client, choose one of the following options:

   - From your browser, enter the appropriate URL. For example,
     `HTTP://Servername/Environment/OWHTML`

   - From your desktop, click the icon assigned to J.D. Edwards Web Client

   - From your browsers favorite list, choose the J.D. Edwards Web Client option set up for your system

2. From the Sign On, complete the following fields, and then click Sign On:

3. From Select User Environment, click the appropriate environment.

   Your authorization might allow you to access a number of environments. However, only the WAN environments that are loaded onto the workstation that you are using, and to which you have access, appear.

   The J.D. Edwards Master Directory appears.

From the main banner, choose one of the following methods to sign off:

- From the Tools pull-down menu, choose Log Off.

- From the OneWorld banner, click Logoff.

- Allow the system to expire. The system expires when unattended for a predetermined amount of time.

Working with J.D. Edwards Master Directory

J.D. Edwards Master Directory is the gateway to J.D. Edwards applications and reports. The Master Directory comes equipped with menu selections (icons and descriptive text) for accessing applications, reports, or additional menus.

Using the J.D. Edwards Master Directory

Menus are the entry point to J.D. Edwards OneWorld applications and reports. Use the J.D. Edwards Master Directory to navigate the OneWorld applications. The menus selections reflect the application suites installed to your business environment. The suites can differ not only between enterprises, but between departments within an enterprise. The application suites can include foundation, financials, HR and payroll management, distribution/logistics, and manufacturing, or combinations of these suites.

► **To navigate through the J.D. Edwards Master Directory**

1. From the Master Directory, choose a menu to continue to the next submenu.
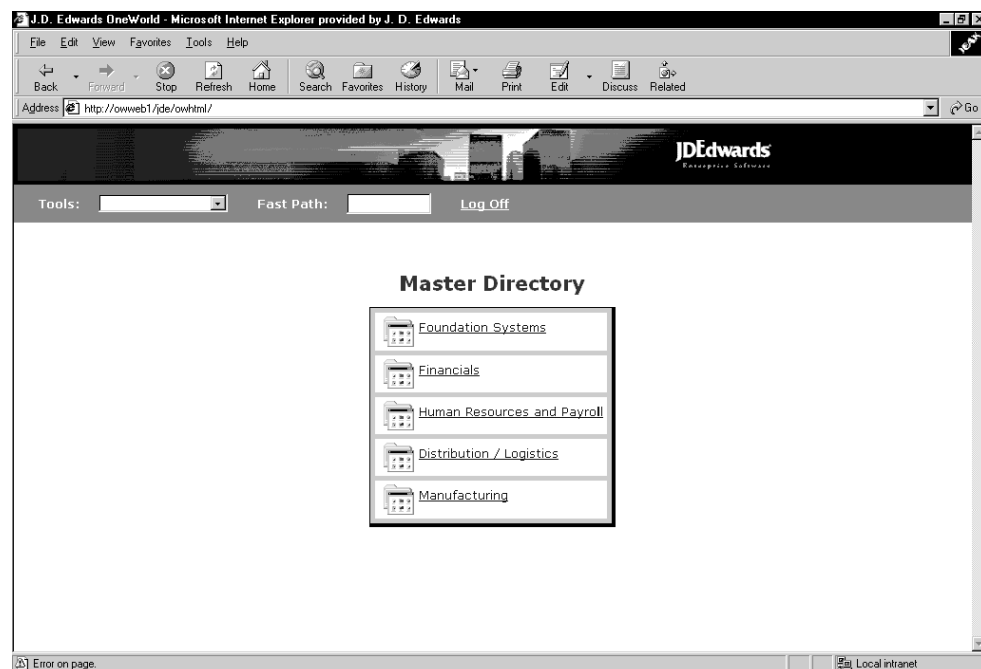
2. Continue with step 1 until the application or report that you want to run is visible.

3. Click the application or report.

Some objects allow you to set values, select a version, or define data selection. To set these variables, hover over the icon to the right of the task, and then select the option that you want. Options that cannot be set for that object are disabled.

Using J.D. Edwards HTML Fast Path

Fast Path must be activated in your User Profile for you to use this method to access J.D. Edwards software menus.

J.D. Edwards Web application tools allow you to use fast path commands to quickly access a menu or application. A fast path command is:

- An abbreviation that is either shipped with J.D. Edwards demo data or which you define to suit your business environment. For example, the fast path OMW takes you to the application Object Management Workbench so that you can work with J.D. Edwards software objects.

- A combination of menu selection and menu number. For example, 2/G01 (menu selection number 2 on menu G01) takes you to Work With Addresses in Address Book.

You can set up your own fast path abbreviations to access frequently used applications using the Menu Design application.

► **To open menus using Fast Path**

1. From the OneWorld banner, in the Fast Path field, enter either an application or menu abbreviation, or a combination of a menu selection and menu number that you want to open. For example, enter G01 to open the Address Book menu. You can also double-click in the fast path field to display previously entered fast paths.

The system displays the menu or accesses the application of the fast path command that you entered.

From J.D. Edwards Master Directory, you can open application workspaces that provide access to OneWorld applications through the use of forms. The application workspace is the area in which all related forms within an application appear.

The following form provides an example of an application workspace with an open form:
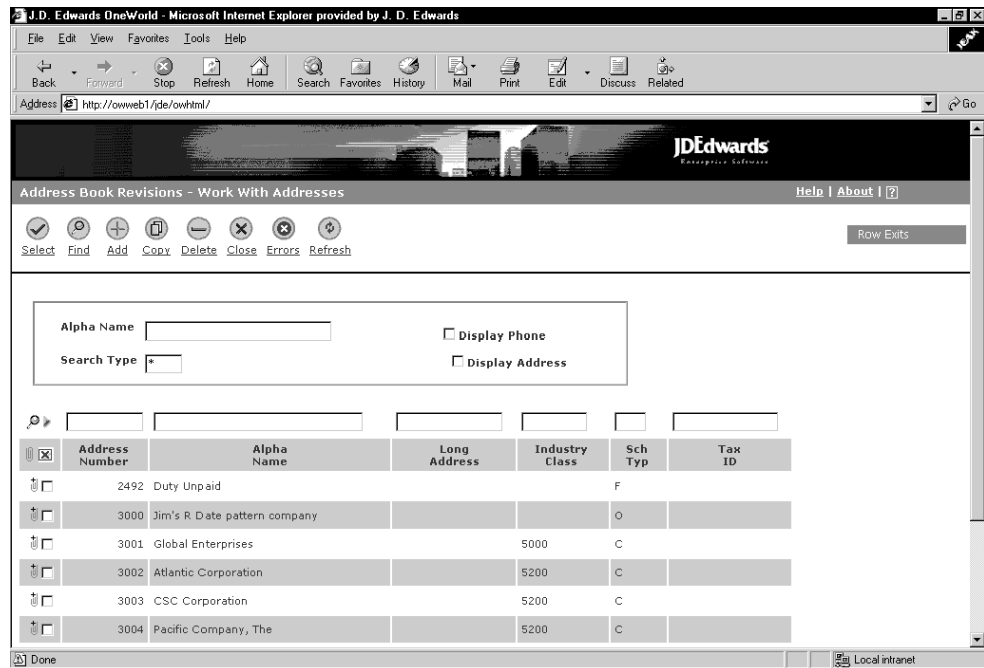
Working with the Toolbar

You must be familiar with the use of the buttons on the toolbar to operate the J.D. Edwards software system. The Toolbar options provide access to specific tasks within J.D. Edwards software.

The following provides information about the functions available on the toolbar:

Select	The Select button chooses one or more records and opens corresponding forms.
Search	The Search button displays all the entries from your database that match the search criteria that you specify.
Add	The Add button opens a new form where you can add a new record.
Copy	From a Browse form, the Copy button copies the entire record. The system copies all fields into a new record, except those fields that are unique to the existing record.
	From a Revision form, the Copy button selects the fields for the new form. You must enter data in all other fields. You can modify on the new form those fields that you copied from the existing record.
Delete	From a Browse or Revision form, the Delete button deletes the entire record.
	Depending upon the application that you are using, the Delete button may also remove related information. For example, if you delete an Address Book record, the system also deletes the phone numbers for that record. See your application user help documentation for information about deleting child records.
Close	The Close button closes the form.

Errors	The Error button displays a full description, the error identification number, and the functions that the error impacts in the Error window.
Refresh	The Refresh button updates your current J.D. Edwards screen and populates the appropriate information based on the information entered into the dialog boxes.

Row Exits

When you move the cursor over Row Exits, a pulldown menu provides a list of options relating to the active form. The functions on the Row Exits vary from form to form. For example, an option might open a data entry form or a form that allows you to attach objects to a record.

Visual Assists

You can use the visual assist button to access valid values available on your forms.

The visual assist helps you search for specific items by providing lists of valid values, such as address numbers and lists of codes that categorize your records. The visual assist button is available in appropriate fields on certain forms.

Error Messages

Errors occur in OneWorld for several reasons. For example, if you enter a value that OneWorld does not recognize, the system highlights the field in red. The description of the error or warning appears in the Errors and Warnings form. You can also access an error message form to review error messages.

► To review error messages

1. On any form that displays an error, perform the following:

   • From the toolbar, click Errors

   The cause of the error or warning appears.
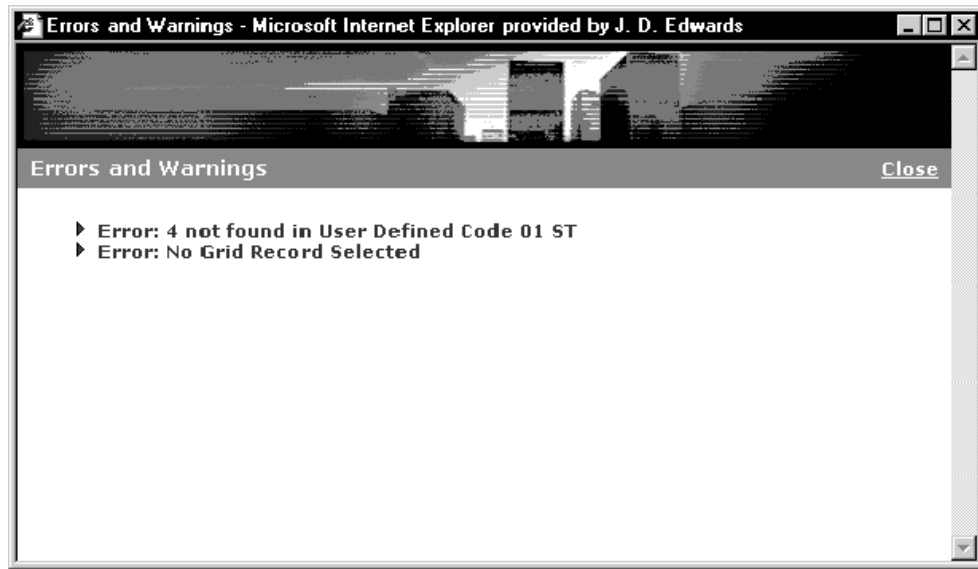
2. To close the Errors and Warnings form, from the title bar, click Close.

J.D. Edwards Java

J.D. Edwards Java is the Java-based gateway to J.D. Edwards software. J.D. Edwards Java does the following:

- Displays menus in a tree structure. You can use the structure to open additional menus and the applications or reports associated with the menus.

- Allows you to use fast path commands to quickly access a menu or application.

- Allows you to use Keyword Search commands to search and access menus and applications.

- Allows you to create and manage bookmarks that function in a similar way to those of a browser to help you access J.D. Edwards software applications.

Signing On and Off OneWorld

To sign on to OneWorld, you must enter a user ID and password on the OneWorld Sign On form. User IDs define the following types of information for each user:

- Security and permissions

- Initial menu

- Language and currency symbol

- Display preferences

On this form, you also have the option to choose the OneWorld environment in which you work. The system administrator will set up your environment for you. Typically, you will need only one environment in which to work.

► To sign on to OneWorld

The system administrator has several choices of how your system is set up for signing on to OneWorld. For example, the system administrator might have you sign on using a URL, clicking on an icon, or using a favorite in your browser.

1. To sign on to OneWorld, choose one of the following options:

   - From your browser, enter the appropriate URL. For example,
     `HTTP://`*Servername*`/`*Environment*`/OWHTML`.

   - From your desktop, click the icon assigned to OneWorld.

   - From your browsers favorite list, choose the OneWorld option set up for your system.

   The OneWorld Sign On form appears.

2. From OneWorld Sign On, complete the following fields.

3. From OneWorld Sign On, place your cursor in the Environment field and click the visual assist that appears to the right of the field.

   Your authorization might allow you to access a number of environments. However, only the WAN environments loaded onto the workstation you are using, and to which you have access, appear.

4. From Select User Environment, double-click the appropriate environment.

To use a different environment, access the Select User Environment form again and double-click a different environment.

The OneWorld Menu Console appears.

► **To sign off OneWorld**

From the OneWorld View menu, choose Log Off.

Understanding OneWorld Menu Console

OneWorld Menu Console is the gateway to J.D. Edwards applications and reports. It provides you with a tree structure of menus and menu selections, allows you to use fast path commands to quickly access a OneWorld menu or application, allows you to search for and display menus and applications, and allows you to create bookmarks that function in a similar way to those of a browser to help you access OneWorld applications.

Note

This section refers to menus from the OneWorld toolbar and not the browser's toolbar.

Using the Tree Structure

The Master Directory comes equipped with a tree structure of menu selections (icons and descriptive text) for accessing applications and reports.

The tree structure appears in the Master Directory window of the Menu Console:
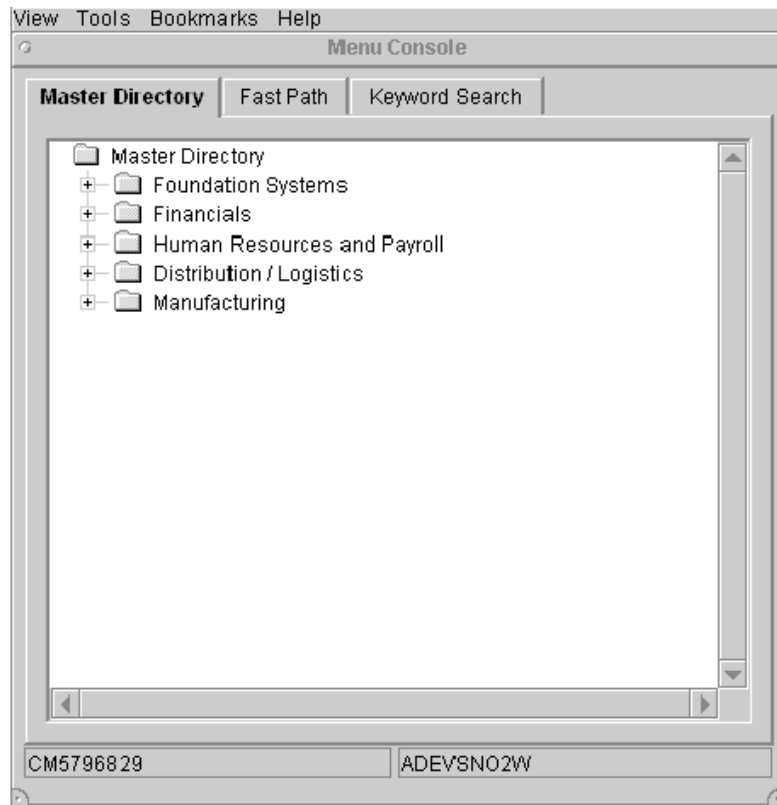
Each item in this tree structure is a menu. If a plus (+) sign appears to the left of a menu, you can expand that menu to show additional menus. If a minus (-) sign appears to the left of a menu, that menu is expanded as far as it goes. You can expand and contract menus in two ways:

- Use your mouse to single-click directly on the plus (+) or minus (-) sign.

- Use your mouse to double-click on the text of the menu. For example, if you double-click directly on the "Foundation Systems" text, that menu will either expand or contract.

Launching Applications

Many menu items launch an application or submit a report when you activate them. To activate a software task, perform one of the following:

- Double-click the task's icon or text.

- Right-click a task and then choose Open.

Some tasks allow you to set values, select a version, or define data selection. To set these variables, right-click the task, choose Prompt For from the pop-up menu, and then select the option that you want. Options that cannot be set for that task will be disabled.

Using the Fast Path

Fast Path must be activated in your User Profile for you to use this method.

OneWorld Web application tools allow you to use fast path commands to quickly access a OneWorld menu or application. A fast path command can be:

- An abbreviation that is either shipped with J.D. Edwards demo data or which you define to suit your business environment. For example, the fast path OMW takes you to the application Object Management Workbench so that you can work with J.D. Edwards software objects.

- A combination of menu selection and menu number. For example, 3/G01 (menu selection number 3 on menu G01) takes you to Work With Addresses in Address Book. As you become more familiar with OneWorld menu abbreviations, you might find fast path a quicker way to navigate to an application.

You can set up your own fast path abbreviations to access frequently used applications using the Menu Design application.

► **To open menus using Fast Path**

1. On Menu Console, do one of the following to move the cursor to the Fast Path field:

   - From Menu Console, choose the Fast Path tab.

   - From the Tools menu, choose Fast Path.

2. In the Enter Fast Path Key Here field, enter the menu ID or the application that you want to open. For example, enter G01 to open the Address Book menu.

Using Keyword Search

Keyword Search is an application that you can use to find and open menus and applications. If you do not know the exact name, enter a single word or a string of words, and Keyword Search displays all menus and applications that match. For example, if you enter ADDRESS BOOK, Keyword Search displays menus and applications that contain the words "address book," such as the Address Book Category Codes menu and the Customer Address Book Revisions application. You can also enter the object name of the menu or application, such as G01. You can also specify if the item for which you are searching is an application or report.

► **To open menus using Keyword Search**

1. On Menu Console, do one of the following to move the cursor to the Search field:

   • From the Tools menu, choose Search Menu.

   • Click the Keyword Search tab.
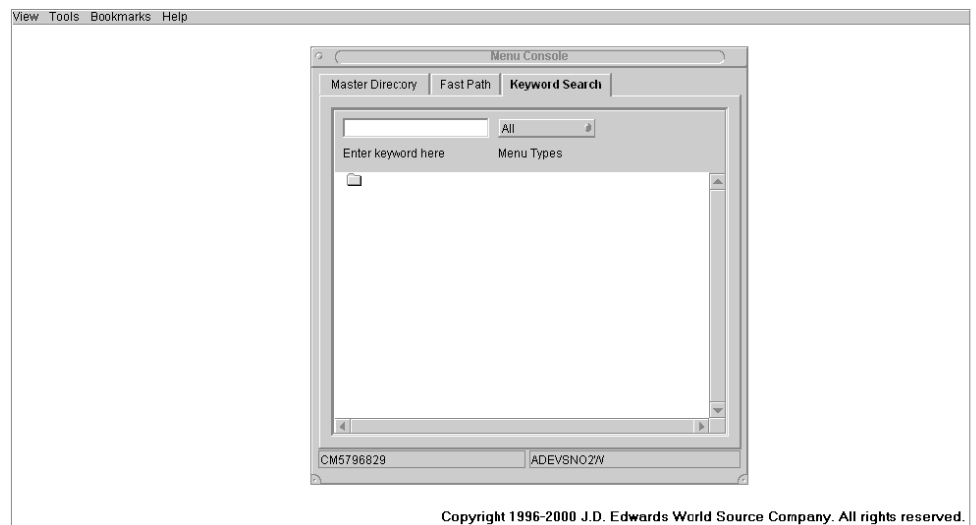
2. On the Menu Console, from the Keyword Search tab, choose either All, Applications, or Reports.

3. Type your search criteria in the following field and then press Enter:

   • Enter keyword here

     Enter a specific system code, such as 01 for Address Book or 00 for the Foundation Environment.

     You can enter a single word, such as ADDRESS, or multiple words, such as ADDRESS BOOK, or a word equivalent, such as UDC for user defined codes. You can also search using object names (such as P0101) and menu IDs (such as G01).

     To eliminate ambiguity, the search is not dependent on case.
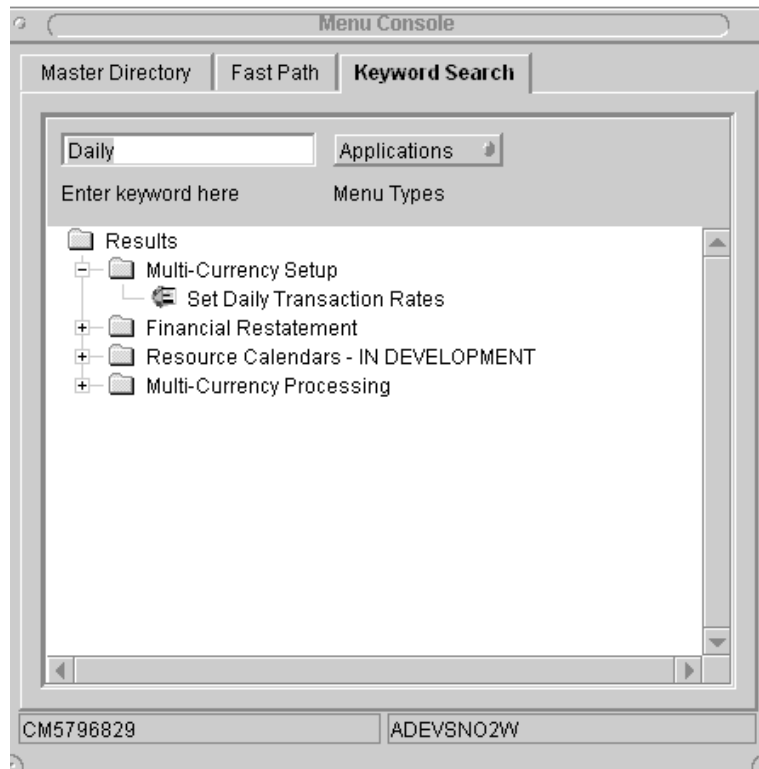
4. From the list in the detail area, choose the appropriate list item, and then perform one of the following:

    •   Right click on the item and choose Open.

        If you choose an application, OneWorld starts that application.

        If processing options are available, choose prompt for values. Enter the appropriate items and choose OK. OneWorld starts that application.

    •   Double-click on the item. If you choose an application, OneWorld starts that application.

    Caution

    If you double-click on an application that uses processing options, you will not be prompted for values. OneWorld starts that application with default processing option values.

Using the Visual Assists

You can use the visual assist button to access valid values that are available on your forms. The visual assist helps you to search for specific items by providing lists of valid values such as address numbers and lists of codes that categorize your records.

The visual assist button is available in appropriate fields on certain forms.

Using Web Bookmarks

Each user (not based on client or browser) can add bookmarks to OneWorld applications. Just as with a browser, you use the bookmark to mark your favorite OneWorld applications. Then you can choose the bookmark to access the application instead of navigating through the J.D. Edwards Master Directory. The bookmark facility also includes a bookmark manager that allows you to organize your bookmarks into folders.

► **To add a bookmark**

1. From the Bookmarks menu, choose Bookmark Manager.
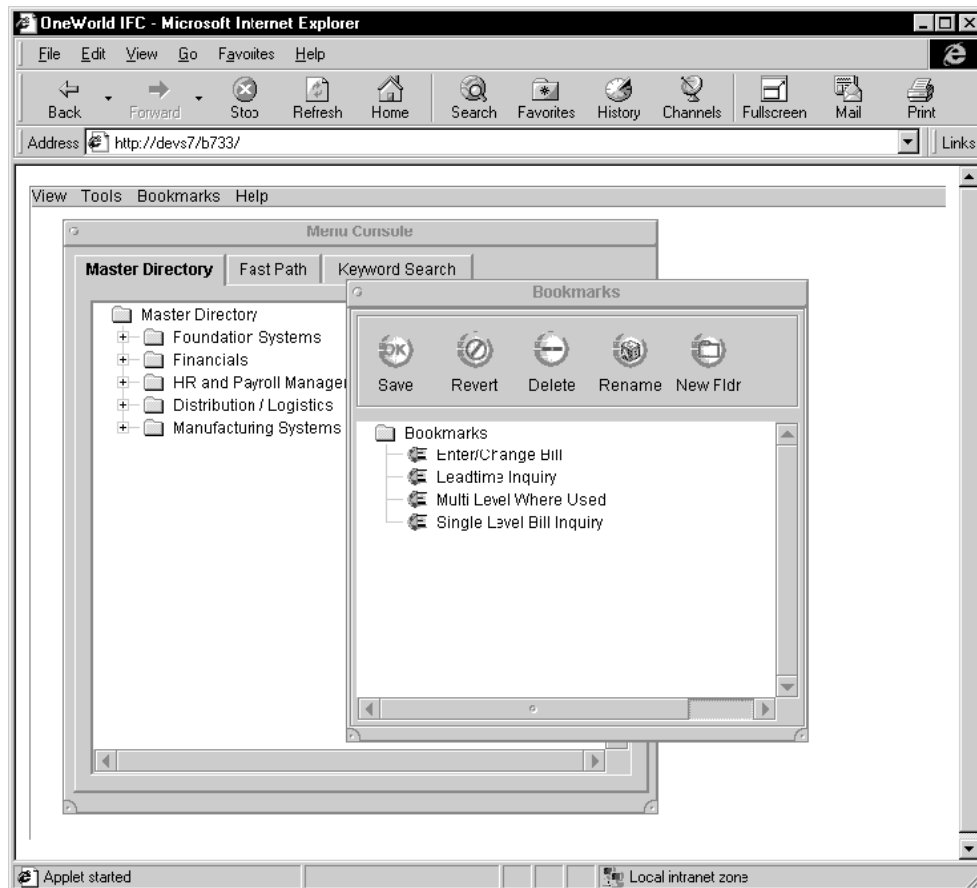
2. On the menu console, from the Master Directory tab, navigate to a OneWorld application for which you want to make a bookmark.

3. Choose the application, or directory (if you want all applications within the directory), that you want to bookmark and drag it to the Bookmarks folder within the Bookmarks window.

► **To modify a bookmark**

1. From the Bookmarks menu, choose Bookmark Manager.

2. On Bookmarks, you can save a bookmark, revert to previous bookmark selections, delete a bookmark, rename a bookmark, and create directories to organize your

bookmarks. You can also double-click an application to access it. Use the following options to manage your bookmarks:

- Save
- Revert
- Delete
- Rename
- New Fldr

Application User Interface

OneWorld applications have a user interface that is similar to J.D. Edwards Explorer, using the same look and feel of menus bars, toolbars, and a status bar. Applications, however, have their own additional features, which include:

- Visual assists, which display specific values for a given field on an application form

- Exit bar, which provides icon-based access to areas within OneWorld, such as messaging, media objects, and forms related to the application

- Task-level online help, which provides step-by-step procedures for completing a given task

- Form types, which establish how each form functions

- Grids, which display records

Understanding the Application User Interface

The OneWorld user interface includes J.D. Edwards Explorer and application forms. From J.D. Edwards Explorer, you can open application workspaces that provide access to OneWorld applications through the use of forms. The application workspace is the area in which all related forms within an application appear.

The following illustration provides an example of an application workspace with a number of open forms:
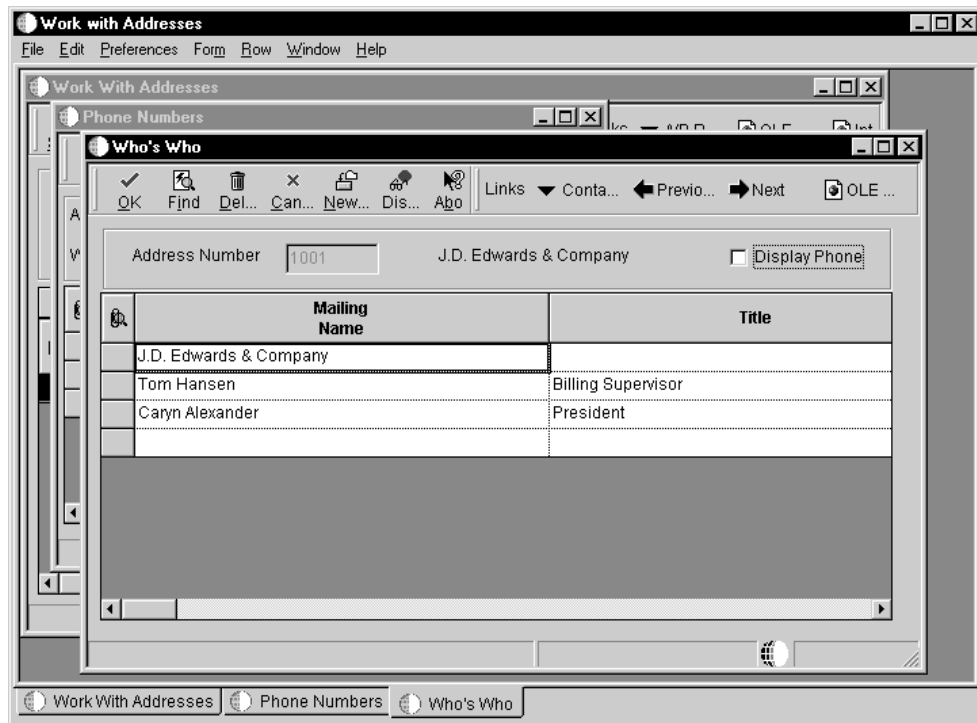
Within certain applications, you can use the modeless processing feature. Modeless processing refers to the ability to move between open forms in an application by choosing the

form with a mouse click. For example, from Address Book, choose Daily Processing, and then choose Address Book Revisions. Address Book Revisions allows access to Work with Addresses. After choosing a record, you can open the Phones and Who's Who forms from the Row menu. You can move back and forth between these forms by clicking the appropriate form. In addition, tabs appear at the bottom of the application workspace. You can activate a form by clicking its tab. Within an application, you can move between forms and display information related to the form in order to assist you with your daily business needs.

Menu Bars

The menu bar that appears on the application workspace corresponds to the active form. Menu bars provide pull-down menus to display options for an application. Use your mouse or the keyboard to choose menus and options on these menus. Depending on the type of form, the menus and options will change.

The functions that are available on the menu bar are defined as follows:

File   From the File menu, you can Select, Find, Add, Copy, and Delete records, Print Screen, Print Setup, and Close the form.

Edit   From the Edit menu, you can Cut, Copy, and Paste information to and from the Clipboard and choose to Undo the last action.

Preferences   From the Preferences menu, you can view the Exit Bar, attach external objects, customize the display of a form, and change the grid.

Form   From the Form menu, you can access other forms that relate to your current form.

Row   From the Row menu, you can access information that is specific to a row chosen in the detail area. For example, you can attach and view objects to a chosen record from the Row menu.

Report   From the Report menu, you can access reports associated with the application.

Window   From the Window menu, you can choose alternate views to display the open forms in an application.

Help   From the Help menu, you can access online help for specific applications.

Toolbars

The toolbar provides you with buttons for executing frequently used commands. When you move your cursor over a button, the system provides a brief description in a yellow Hover Help box below your cursor and a complete description in the status bar of the form.

J.D. Edwards software provides standard toolbar features and toolbar display formats for each form. However, you can customize the features and the display of the toolbar to suit the functionality for each individual form. You must be familiar with the use of the buttons on the toolbar to operate the J.D. Edwards system. The following list describes the functions of the standard toolbar buttons:

Select Selects one or more records, and opens corresponding forms.

Find Displays all the entries from your database that match the search criteria that you specify.

Add Opens a new form where you can add an new record.

Copy From a Browse form, the Copy button copies the entire record. The system copies all fields except those that are unique to the existing record into a new record.

From a Revision form, the Copy button selects the fields for the new form. You must enter data in all other fields. You can modify those fields that you copied from the existing record on the new form.

Delete From a Browse or Revision form, the Delete button deletes the entire record.

Depending upon the application that you are using, the Delete button may also remove related information. For example, if you delete an Address Book record, the system also deletes the phone numbers for that record.

See your application user guide for information about deleting child records.

Close Closes the form.

OK Accepts the data in the current form.

Cancel Ignores any additions, revisions, or deletions that you made to the current form, closes the form, and moves to the previous form.

The Links toolbar supplies buttons that provide access to other areas in J.D. Edwards software and the Internet. The hyper-button displays a down arrow. When you click on the down arrow, the pop-up menu displays the same options that exist on the menu bar, as well as a Tools menu that has a link to other features, including the Internet.

The function of the hyper-button varies from form to form. For example, the hyper-button could open a data entry form or open a form that allows you to attach objects to a record.

When you click the down arrow on the hyper-button, a pull-down menu appears that provides a list of various options relating to the active form.

The default form that you open when you click the hyper-button changes to the last form that you accessed using the down arrow. This feature allows you to set the hyper-button with a link to the form that you use most frequently.

Exit Bars

The Exit bar is a movable and dockable toolbar that provides quick access to other applications and forms within the current application. The Exit bar also accesses an online calculator and calendar, messaging, and the Internet. You can choose Exit Bar from the Preferences menu to turn the Exit bar on and off.

The following illustration provides an example of an application with an active exit bar:
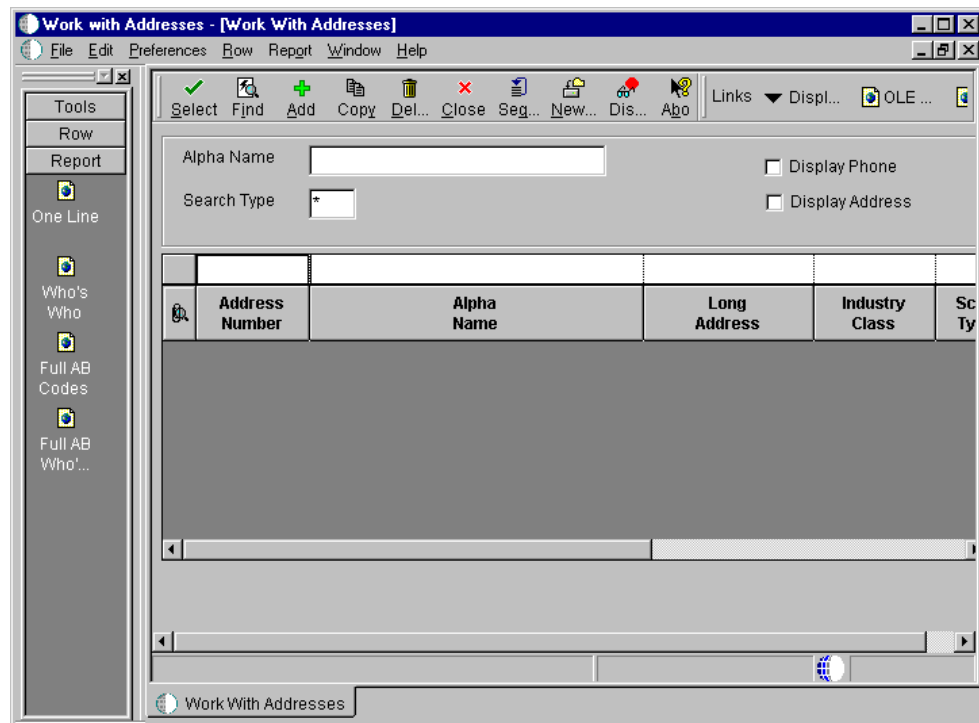
The following categories appear on the Exit bar:

- Tools

- Menus that appear between the Preferences and the Help menu (except for the Window menu)

The Row and Report categories on the exit bar provide the same options as the corresponding Row and Report menus on the menu bar. The options for these buttons appear on the Exit bar if the corresponding menu bar option is available. The Tools category on the exit bar is not represented on the menu bar. However, you can access the Tools menu by clicking the down arrow located on the Links toolbar and choosing Tools.

The Tools category provides the following standard buttons:

Calendar	Displays a calendar. On the calendar, use the mouse or keyboard to choose a date, and then click OK.
Calculator	Displays a calculator. On the calculator, use the mouse or keyboard to perform the calculations and then click OK.
Work Center	Accesses the Employee Work Center, which is the application that you use for J.D. Edwards e-mail messages. For complete information on messaging and the Employee Work Center, see *Messages and Queues*.
Internal Mail	Displays the Send Internal Mail form, which you can use to send messages to J.D. Edwards software users within your enterprise. For complete information on messaging and the Employee Work Center, see *Message and Queues*.
External Mail	Displays the Send External Mail form (if you previously set up your messaging for external mail), which you can use to send messages to people outside of your J.D.

Edwards software enterprise. For complete information on messaging and the Employee Work Center, see *Messages and Queues*.

Internet   Provides a link to the Internet. Click this button and your Internet browser opens.

Create Shortcut   Creates a shortcut on your local machine's desktop of the form that you are viewing. For example, if you are in the Work With Addresses form and you click the Create Shortcut button, a shortcut appears on your desktop that will open the Work With Addresses form.

Send Shortcut   Displays the Send Internal Mail form with a shortcut attached to the message of the form you are viewing. You can then send the shortcut to another J.D. Edwards software user in your enterprise. For complete information on messaging and the Employee Work Center, see *Messages and Queues*.

Pop-up Menus

You can access certain information directly on the form through a pop-up menu. When you click the right mouse button in certain areas on the form, such as the grid, you can display a menu that provides options that are specific to that area of the form. For example, when you customize the grid, you can display this pop-up menu to choose options that allow you to change the features of the grid, such as the font and background color.

The following illustration is an example of a pop-up menu for the grid:
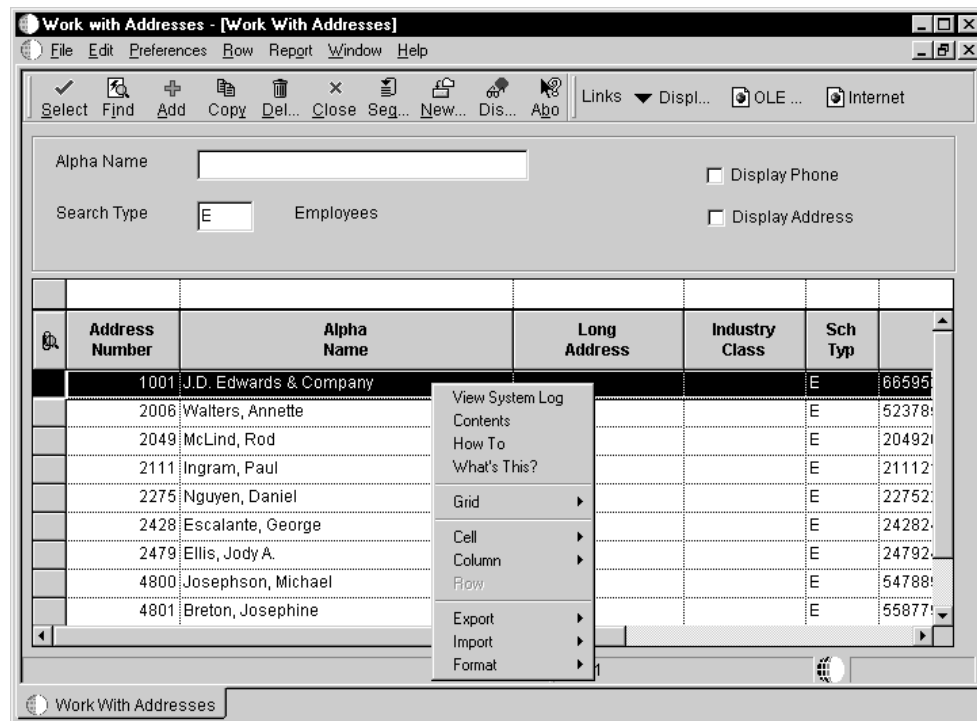
Scroll Bar

A scroll bar appears on the right side or bottom of a form when more information is available than will fit into the viewing area of the form. You can use this bar to scroll to the additional information. Single-click these buttons to move up or down one record at a time. Click and hold the mouse button down to scroll through more than one record.

Within the scroll bar is the scroll box, which shows the position of information visible in the form. Either click and hold the scroll box and move it, or single-click in the area on either side of the box.

Visual Assists

Visual assists provide you with a predetermined list of selections that are available for a certain field. Visual assists also allow you to access supplemental tools available on your forms, such as the Search button, Calculator button, and the Calendar button. These tools automate the process of inputting information into fields. The calculator and the calendar are also available from the Tools menu. Examples of visual assists include the following:

- Search
- Calculator
- Calendar

Search

The search button is available in appropriate fields on certain forms. It helps you search for specific items by providing lists of valid values, such as address numbers and lists of codes that categorize your records. This button may also be represented by other icons.

For example, suppose one of your job requirements is to perform standard invoice entry. When you enter the Standard Entry Form, you are not sure of the customer number. Clicking in the Customer Number field causes the visual assist to appear. Clicking the visual assist brings you to a search form from which you can search on the customer name to find the customer number.

Calculator

The calculator visual assist displays a calculator to use for arithmetic operations. As you continue the standard invoice entry, you can use the calculator to assist you in calculating the Gross Amount for a particular Pay Item.

Calendar

The calendar visual assist displays a calendar. As you continue the standard invoice entry, the calendar assists you in determining the Void Date.

Status Bars

OneWorld provides a status bar that appears at the bottom of all forms. Status bars provide information about your current location in OneWorld.

The following information appears on the status bar of OneWorld forms:

- Descriptions of menu options

- Status of record retrieval and a Stop button to end retrieval

- Error messages

Online Help

Online help provides you with additional information about fields and forms. This information can be an explanation of a field or a task on how to use a form. Online help uses hypertext, which allows you to quickly move from one topic to another, or to display a definition about the term that you selected. When you are working in an application, you can access online help for either a specific task or a single field.

There are two types of hypertext:

- Text that directly jumps to another topic. This text highlights as a different color with a solid underline.

- Pop-up text. This text is usually shown as green text with a broken underline. Pop-up text displays a form that overlays the existing topic. Pop-up forms display a brief definition or provide additional clarification.

You can access help from the Help button on the toolbar or from the following options on the Help menu:

Contents	Opens the table of contents for your current system. The table of contents file organizes topics by guide, section, and chapter.
How To	Displays a task-oriented procedure that is associated with your current form.
Display Errors	Shows the first error or warning message for a form.
Next Error	Moves to the subsequent error in a form.
About OneWorld	Displays information about the menu or form, including program and form ID information.

Accessing Task-Level Help

When you need to know the steps to perform a specific task, you can access task-level help. This help provides brief, conceptual information along with the steps that you must perform to successfully complete the task.

► **To access task-level help**

From any application form Help menu, choose How To.

The online help topics for the task appear.

Accessing Field-Level Help

Use field-level help to see a detailed description about a field within a form. The description includes a definition of the field, and describes valid values and variables such as field length.

1. On any application form, place the cursor in the field about which you want information.

2. Do either of the following:

   - Press F1.

   - Click the right mouse button, and from the menu that appears, choose What's This.

   A pop-up appears with the information about the field.

3. Click the form or press any key to remove the pop-up.

Error Messages

If you enter a value that OneWorld does not recognize, the system highlights the field in red and displays the following in the status bar:

- A description of the error

- The number of errors and warnings for the current form

  If more than one error or warning exists on a form, you can press F7 to move to the next error or warning. The description of the error or warning appears on the status bar at the bottom of the form. You can also access an error message window to review error messages.

► **To review error messages**

1. On any form that displays an error, perform one of the following:

   - From the Help menu, choose Display Errors.

   - Press F8.

   - Click the Display Errors button.

   - Click the red stop-sign icon at the bottom right of the form.

2. Choose an error in the error message window at the bottom of the form, click the right mouse button, and choose Full Description from the pop-up menu.

   The cause of the error and how to resolve it appears.

3. Click anywhere on the desktop, or press any key to close the description.

4. Click the right mouse button, and then choose Detail to review the error identification number and the functions that the error impacts.

5. On Error and Warning Detail, after reviewing the information, click Close to exit the error message information.

6. To close the error message window, click the right mouse button and then choose Close.

   Before you close the error message window, you have the option of activating an audio signal that alerts you with an audible beep when an error occurs.

7. To activate the signal, click the right mouse button and then click Error Beep. A checkmark appears next to Error Beep on the pop-up window. Click Error Beep again to remove the checkmark.

1. On a form with an error message window, click and hold the left mouse button slightly above the error message window.

   A box appears around the message window.

2. Move the message window to the desired location and then release the left mouse button.

   The message window detaches from the OneWorld form.

3. Resize the window by placing the cursor over the edge of the message window. When the cursor changes to a double arrow, resize the window.

   You can also resize the window while it is still attached to the OneWorld form. Place the cursor over the dark line between the window and the form. When the cursor changes to a double arrow, resize the window.

Form Types

Applications use a variety of form types. The characteristics of each form type remain the same, regardless of the application in which you access the form.

Find/Browse Form

The Find/Browse form provides the entry point to most applications. It contains an optional query-by-example (QBE) line so that you can search on any field in the grid. The standard title for a Find/Browse form begins with Work With followed by the information specific to the business task. You cannot add or change existing records on a Find/Browse form.

Find/Browse forms allow you to perform the following:

- Search, view, and select multiple records in a grid

- Exit to another form to add, change, or view a record

The following illustration provides an example of a Find/Browse form where the only criteria has been to find all names with a search type of E for employee:

Search/Select Form

Use the Search/Select form to locate a value for a field. The grid displays valid values that are stored in a database table. When you choose a value from the grid and click the Select button, that value is automatically placed in the field. For example, when you need to enter a user defined code into a field, the visual assist appears, allowing you to access a Search/Select form that displays a list of user defined codes. You can select an item from the list and place it in the appropriate field. You cannot edit the information that appears on this form.

The following illustration is an example of a Search/Select form:

Header Detail and Headerless Detail Forms

The Header Detail and Headerless Detail forms include a detail area, the OK button, and the Cancel button. You can change multiple records using these forms. The Header Detail form includes information from two different business views to provide more depth on the information that appears on the form. The Headerless Detail form provides information from only one table. At the top of the form, data displays that is common to all the records in the grid.

Header Detail and Headerless Detail forms allow you to perform the following:

- Display multiple records

- View records

- Add records

- Change records

- Delete records

The following illustration is an example of a Header Detail form:

The following illustration is an example of a Headerless Detail form:

Fix/Inspect Form

The Fix/Inspect form does not include a detail area. If a record was selected on a previous form, the Fix/Inspect form displays data for that record. If you are adding a record, the Fix/Inspect form is empty, except for any default values.

Fix/Inspect forms allow you to perform the following:

- View a single record

- Add a record

- Change a record

The following illustration is an example of a Fix/Inspect form:

Parent/Child Form

The Parent/Child form presents parent/child relationships in an application on one form. The left portion of the form presents a list of items. The right portion of the form displays information that relates to the selected item in the left portion of the form. The Parent/Child form supports the ability to drag and drop items from one area to another. This form includes Select and Close buttons.

The following illustration is an example of a Parent/Child form:

Process Activity Monitor - [Process Activity Monitor]

File   Edit   Preferences   Row   Window   Help

Select   Find   Close   Seq...   New...   Dis...   Abo | Links   ▼ Termi...   OLE ...   Internet

Process   *   Start Date From   *
Status   *   Thru   *

Description	Resource	Status	Start Date	Start Time
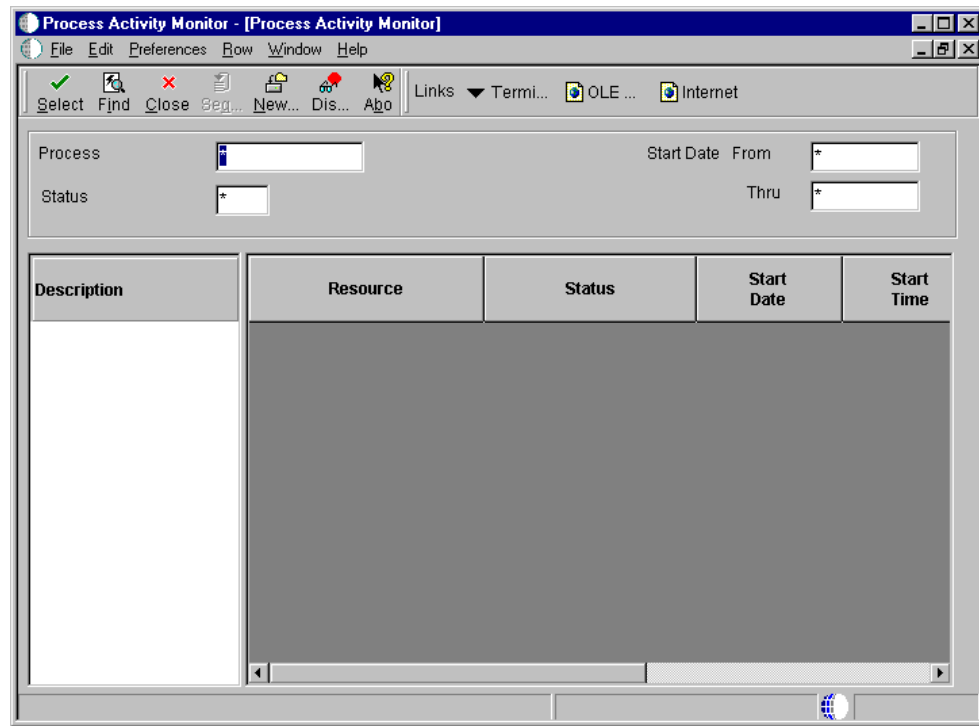
You can resize the display areas according to your personal preferences.

Message Box

The message box contains information about processing that occurs when you work with OneWorld. For example, when you delete a record, a Confirm Delete message box appears to ask if you are sure that you want to delete the object. The message box might also include information about an event that occurs while you work with OneWorld.

Tab Controls for Forms

Some forms have tabs. Each tab can display a logical grouping of fields. This grouping occurs within those applications that contain a lot of fields that can be logically grouped into tabs, for example, the revisions form within the Manufacturing Constants application. The tabbed groupings make finding and completing fields easier. See your application guide for information about tabs within a specific application.
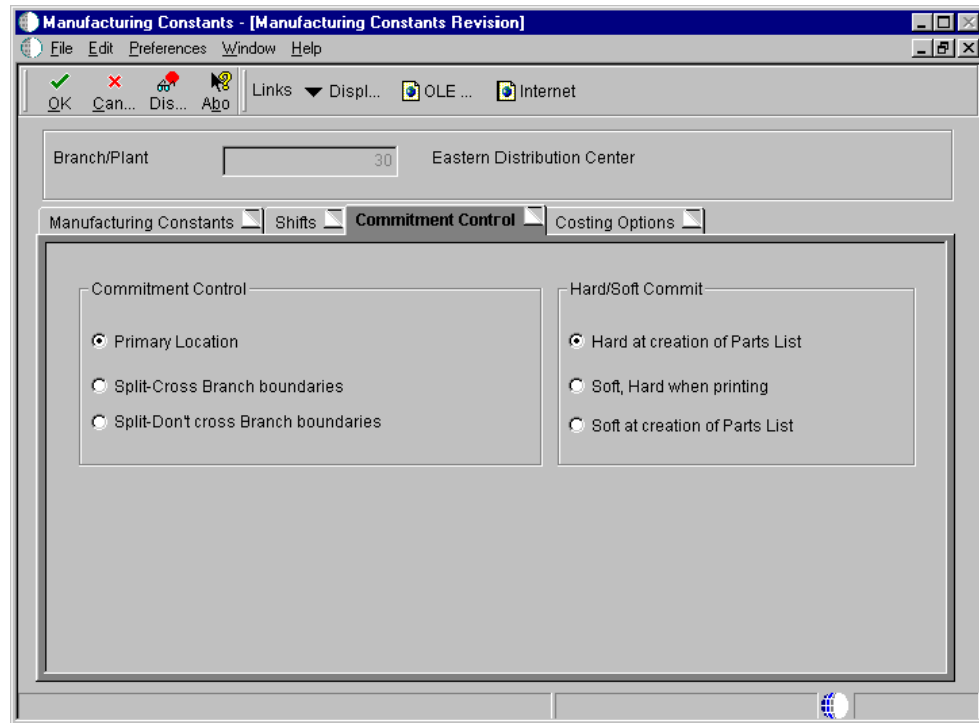
To move between tabs, do one of the following:

- Single-click on a tab header and it appears in front of the others.
- Press the left and right arrow keys on your keyboard when the cursor focus is on the tab header. You can move the focus to the tab header by tabbing through the last field on that tab.
- Press the Ctrl + Tab or the Ctrl + Shift + Tab keys.

These tabs should not be confused with J.D. Edwards Explorer tabs and the grid format tabs that you can create. For information concerning J.D. Edwards Explorer tabs, see *Creating Tabs*. For information concerning formatting grids, see *Creating Formats*.

Working with the Application User Interface

OneWorld provides features that allow you to personalize your application user interface. Additional features, such as the exit bar and an online calculator, simplify the processes necessary to complete your daily business requirements.

Changing the Display of the Toolbar

You can move the Links toolbar to display more of the toolbar or to display below the main toolbar.

► **To change the display of the toolbar**

1. On a form toolbar, click and hold the left mouse button on Links.
2. Perform one of the following:

- Move the cursor left or right to display more or less of the links section.
- Move the cursor down to display the full Links section below the toolbar buttons.

Customizing Menu Bars and Toolbars

You can customize the appearance and performance of each form by customizing menu bars and toolbars. When you customize your toolbar, the Hint box and the Status Bar Help box provide information that describes the help messages that appear on the actual form for a certain button. The Buttons box displays the available buttons for each category.

The following restrictions apply when you customize your menus and toolbars:

- You cannot add more than one menu or toolbar.
- Although you can remove menu options and toolbar items at the form level, you cannot delete an existing menu or toolbar item from the system.
- You cannot duplicate an item that already exists on a menu.

When you see an ampersand (&) on the Customize form, the letter that directly follows the ampersand represents the accelerator key for that menu bar command.

▶ To customize toolbars

1. On any form with a toolbar, from the Preferences menu, choose Customize.
2. On Customize, click the Toolbar tab.
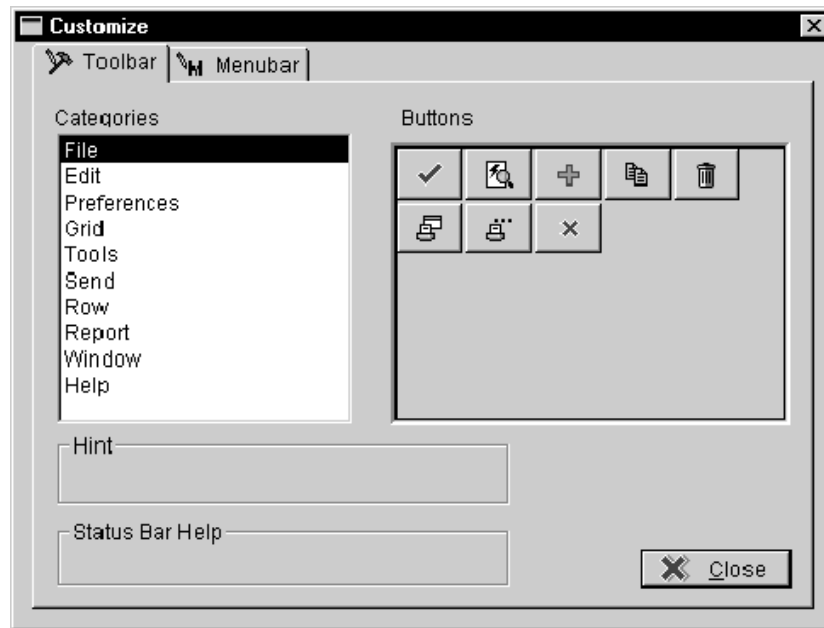
3. On Customize, choose a category from the Categories list.
4. Click and drag items from the Buttons box onto the toolbar.
5. To remove a button from the toolbar, click and drag the button off the toolbar.

► **To customize menu bars**

1. On any form with a menu bar, from the Preferences menu, choose Customize.
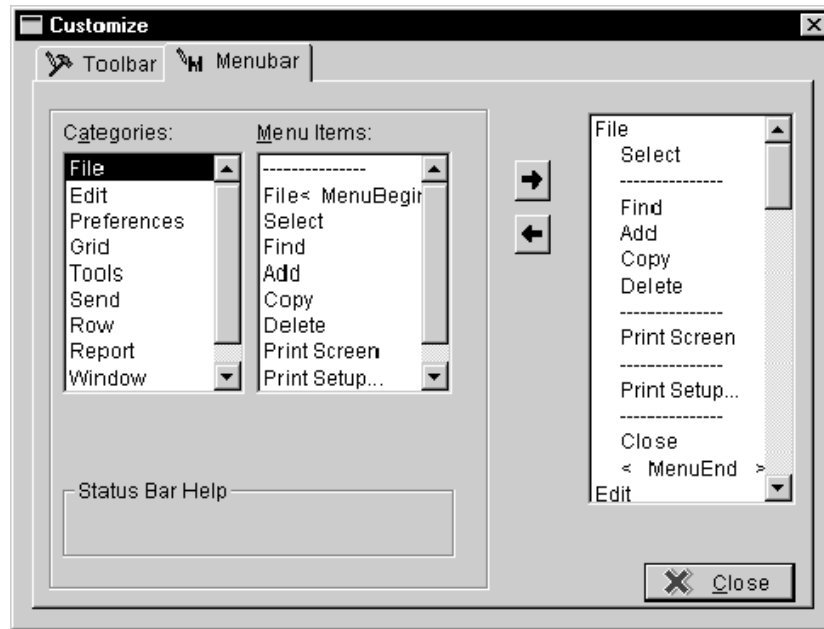
2. On Customize, click the Menubar tab.

3. From the Categories list, choose a menu to which you want to add an item.

   The Menu Items list displays the available items and separator bars. The list to the right of the form shows the items currently on the menu.

4. From the Menu Items list, choose the item that you want to add.

5. In the list box to the right, choose the item below which you want the new item to appear. If you do not choose an item, your new item appears at the bottom of the list.

6. Click the top arrow button to add your menu item.

   The selected item appears below the highlighted item in the list to the right. An ampersand before the letter represents the accelerator key. If you do not choose an item in the list of current menu items below which you want your new menu item to appear, the new menu item defaults to the end of the list of current menu items.

7. To remove a list item, choose the item in the list to the right and then click the bottom arrow button.

8. Click Close and verify the changes you made.

Working with Modeless Processing

In certain applications, you can open multiple forms and move between them to exchange information. For example, in Address Book, you can open the Phones and Who's Who forms from the Work with Addresses form to display all three forms at the same time. You can then verify that the information on each of the forms corresponds to the information on the others. The Window menu allows you to arrange the open forms.

► **To move between forms**

On a form that supports modeless processing, with multiple forms open, perform one of the following:

- Click a partially hidden form to bring the form to the front of the display.
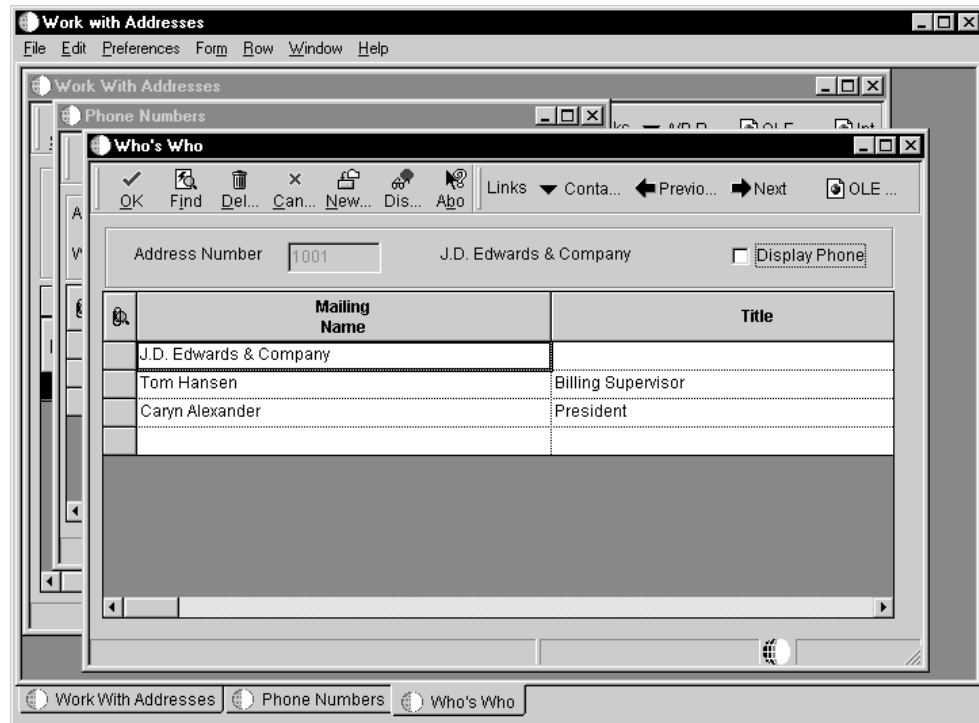
- Click a tab at the bottom of the form to bring a form to the front.
- From the Window menu, choose the name of the form to bring the form to the front.

► **To arrange the forms**

1. On a form that supports modeless processing and with multiple forms open, from the Window menu, choose one of the following:
   - Cascade
   - Tile Horizontally
   - Tile Vertically
2. Move the cursor over the edge of a form until the cursor becomes a double arrow.
3. Click and hold the left mouse button, then move the cursor until you achieve the desired width.

Working with the Exit Bar

You can display the exit bar for an application to provide easy access to other forms in the application, other applications, an online calendar and calculator, messaging, and the

Internet. Initially, the exit bar appears at the left of the parent window, but you can move the bar to the right or detach the bar from the form. If you detach the bar, when you leave the form and then return, the exit bar appears in its default position at the left of the form. You can also resize the exit bar. OneWorld saves your exit bar preferences when you sign off OneWorld.

Depending on the current form within an application, you can display the Tools bar and any menu that appears between the Preferences menu and the Help menu except for the Window menu. Options do not appear for the Form bar and the Row bar unless the Form menu or the Row menu appears on the menu bar for the active form.

► **To display the exit bar**

In any application, from the Preferences menu, choose Exit Bar.

► **To move the exit bar**

1. In any application with an exit bar, click and hold the border of the exit bar.
2. Perform one of the following:

   - Drag the box to the right side of the form.
   - Drag the box to the left side of the form.

► **To detach the exit bar**

In any application with an exit bar, perform one of the following:

- Double-click the border of the exit bar.
- Click and hold the border of the exit bar and drag the gray box to the middle of the form.

► **To resize the exit bar**

1. In any application with an exit bar, move the cursor over the right edge of the exit bar until the cursor becomes a double-arrow.
2. Click and drag the border until you achieve the desired width.

► **To open a function or application with the exit bar**

1. In any application with an exit bar, click a bar on the exit bar for the category that you want to display, such as Tools.
2. On the active exit bar for any given button, click the button for the appropriate function or application.

Working with Visual Assists

OneWorld provides tools to help you with certain tasks that you might need to complete. For example, you can access an online calculator to place the result of a calculation in a numeric field or you can access an online calendar to enter a specific date. When a record requires you to place a specific value in a field, you can use a visual assist to determine the valid values for the field.

► To use the calculator

Turn on Num Lock before you use the keyboard with the calculator.

1. On any form with a numeric field that requires a calculation, click that field.

2. Click the Calculator button.

3. On Calculator, use the mouse or the keyboard to perform the calculation.

    If you use the numeric pad on the keyboard, Num Lock must be turned on.

4. Click OK.

    The system displays the calculated value in the selected field.

► To use the calendar

1. On any form with a date field, click that field.

2. Click the Calendar button.

3. On the calendar, choose the correct month and year from the drop-down lists.

4. Click the correct date in the calendar and then click OK.

    The system displays the date in the selected field.

► To use the visual assist button

1. On any form, when you click in a field and the visual assist button appears, click the visual assist button

    One of the following form types appears:

    - A user defined code form:

- A record search form:

2. Choose your selection and then click Select.

   The system displays the selection in the selected field on the previous form.

► **To access a visual assist in a header field**

1. In a field that accesses a visual assist, click the right mouse button.
2. From the pop-up menu, choose Visual Assist.

   The appropriate visual assist appears.

► **To access a visual assist in a detail field**

1. Click in a field that accesses a visual assist and then click the right mouse button.
2. From the pop-up menu, choose Cell and then Visual Assist.

   The appropriate visual assist appears.

Working with the Grid

The grid includes columns, descriptive column headers, rows, and row headers. In general, each row represents one record. To customize the grid you can:

- Create multiple views of information in which you can change the format of the rows and the columns
- Change the font properties
- Change the color properties

- Detach and expand the grid to view more information at the same time
- Adjust the magnification of the grid
- Freeze specific columns or rows of information so that they remain in place as you scroll through the rest of the information

After you customize your grid, you can create a format to save your changes that is based on your user ID. The system then loads your specific format whenever you sign on to the system.

OneWorld allows you to export the contents of the grid into a Windows-based spreadsheet or word processing application. Conversely, you can import data from a spreadsheet into a grid in OneWorld.

You can also print the contents of the grid.

Working with Grid Formats

You can create grid formats to save the customized changes that you make to sort sequence, fonts, colors, and magnification. For example, you can create and save multiple formats to display different views of the same grid. A tab appears at the top of each newly created format. If you have multiple formats, you can move among views by clicking tabs.

After you create your formats, you can rename them or delete them from your system. Your custom formats load in subsequent sessions on any workstation when you enter your user ID.

► To create grid formats

If you want to recall the default format, save the original grid format before you save a new format. Otherwise, you must remove the new format, exit the application, and then access the application again to view the default grid format.

1. On any form with a grid, click the right mouse button in the grid to display a pop-up menu.

2. From the pop-up menu, choose Format and then New Format.
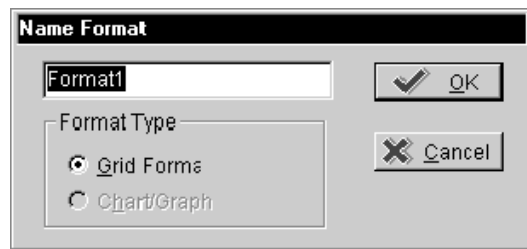
3. On Name Format, enter the name of the format.

   You can accept the name OneWorld provides or enter your own.

4. Choose Grid Format as the format type and then click OK.

5. Click a tab to display that view of the grid.

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► **To rename grid formats**

1. On any form with format tabs for a grid, choose a format tab.

2. Click the right mouse button in the grid to display a pop-up menu.

3. From the pop-up menu, choose Format and then Rename Format.

4. On Rename Format, change the name of the format and then click OK.

► **To delete grid formats**

1. On any form with format tabs for a grid, choose a format tab.

2. Click the right mouse button in the grid to display a pop-up menu.

3. From the pop-up menu, choose Format and then Remove Format.

   The system removes the tab for the format that you delete.

Customizing the Format of the Grid

Format your grid to customize the sequence of the columns and rows by reordering the columns or by sorting the rows differently. For example, you might want to move a column that you often use from the end to the beginning. You can also change the size of columns and rows to display more information, or determine new sorting criteria to display records in a sequence more appropriate to your business needs. You can sort records by any column in the grid. Each format supports a sort sequence that is unique to the format.

The Auto Return feature allows you to designate a column in the grid that sends you to the first cell in the next row when you tab out of a cell.

► **To reorder grid columns**

1. On any form with a grid, click and hold down the left mouse button over the title of the column that you want to move.

   The cursor becomes a column with a double-arrow.

2. Drag the column to the new position.
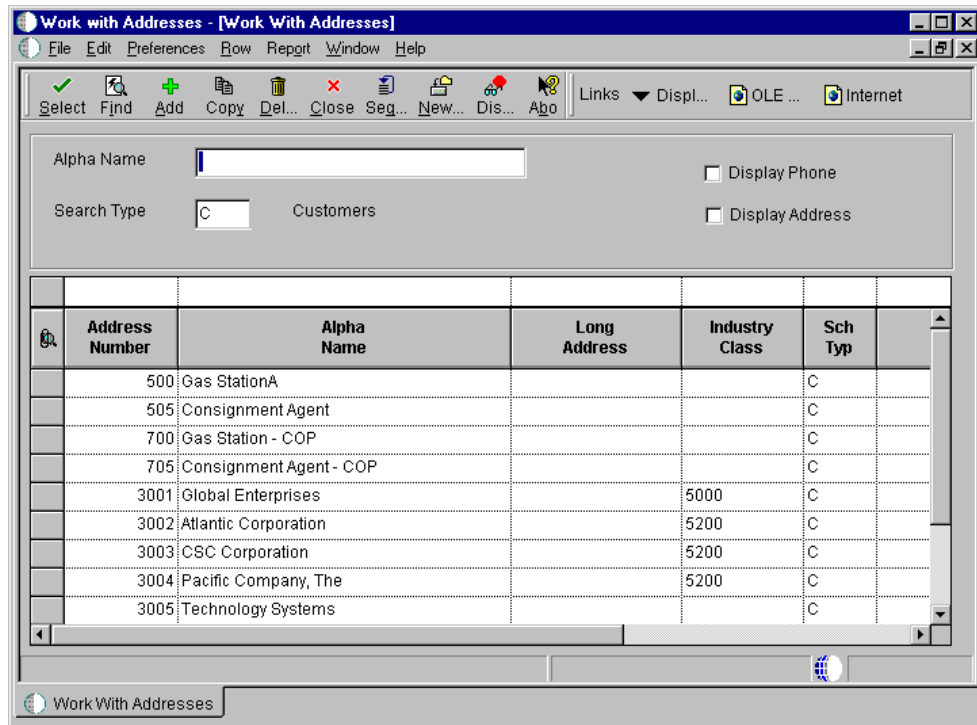
3. Release the mouse button.

   The column moves next to the column over which you released the mouse button.

► **To change the sort sequence of a grid**

1. On any form with a grid, click the right mouse button in the grid to display a pop-up menu.

2. From the pop-up menu, choose Grid and then Sequence.
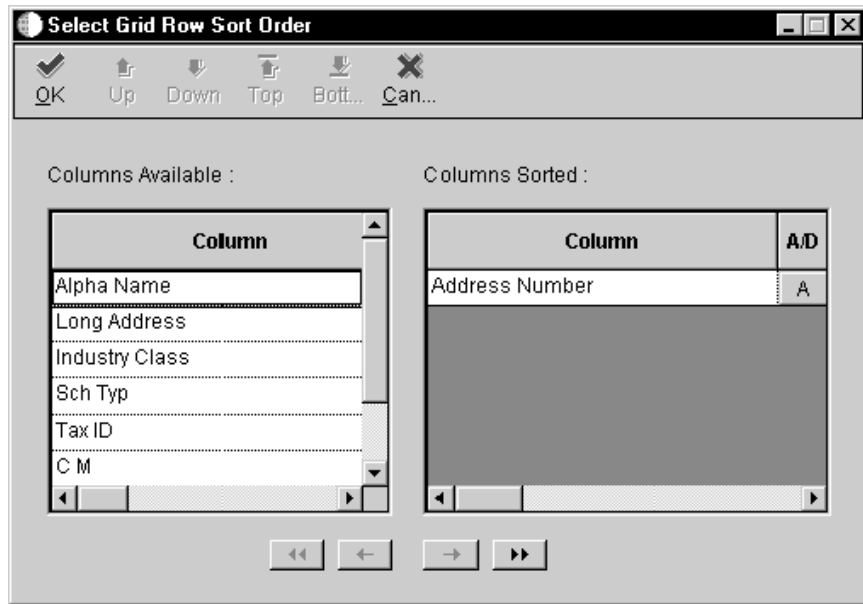
3. On Select Grid Row Sort Order, you can choose which columns that you want to use to sort your information by performing one of the following tasks:

    - From the Columns Available list, choose a column, then click the right-arrow button at the bottom of the form.

      The column appears in the Columns Sorted list.

    - To sort all of the columns, click the double-right-arrow button at the bottom of the form.

    - To remove a column, from the Columns Sorted list, choose a column and then click the left-arrow button (click the double-left-arrow button to remove all of the columns).

      The column appears in the Columns Available list.

4. To change the sort sequence of the columns, from the Columns Sorted list, choose a column, then click one of the following buttons on the toolbar:

    - Up

      Moves the column up in the sort order one column at a time.

    - Down

      Moves the column down in the sort order one column at a time.

    - Top

      Moves the column to the top of the sort sequence.

    - Bottom

      Moves the column to the bottom of the sort sequence.

5. To change the order of the records in a column, from the Columns Sorted list, click the A or D field next to the column. This toggles between the following values:

- A

  The records appear in ascending order.

- D

  The records appear in descending order.

6. Click OK.

   Your changes appear in the grid.

► **To resize grid columns**

1. On any form with a grid, move the cursor over the right edge of the column that you want to size.

   The cursor becomes a double-arrow.

2. Click and drag the right edge to increase or decrease the width of the column.

3. Release the mouse button.

► **To resize grid rows**

You can only size rows that have grid row headers. A row header is the field that can display and icon, such as a paperclip for attachments, to the left of the grid.

1. On any form with a grid, move the cursor over the top edge of the row header for the row you want to size.

   The cursor becomes a double-arrow.

2. Click and drag the top edge to increase or decrease the height of the row.

3. Release the mouse button.

The following icons can appear in the row header column of a grid to specify additional information:

Lock	The lock above the first column indicates that you have moved into a protected field. You cannot change information in this field
Paper Clip	The paper clip indicates that a media object exists as an attachment to this record
	The paper clip icon only appears next to a record with attachments when you check for attachments

See Also

❑ *Attaching Media Objects* to add text, images, object linking and embedding (OLE) objects, and shortcuts to records

► **To set up Auto Return for a grid**

The Auto Return feature allows you to designate a column in the grid that sends you to the first cell in the next row when you tab out of a cell. For example, if you enter similar information into a large number of grid rows but you do not enter information into every

column on the grid, you can arrange your columns into a specific order. Then you can set Auto Return on the last column into which you enter information so that when you tab out of a cell in that column, you continue entering information for the next row. You can set up Auto Return only on an input-capable grid.

1. On any form with an input-capable grid, on the column you want to set as your last column, click the right mouse button to display a pop-up menu.

2. From the pop-up menu, choose Column and then Auto Return.

    A colored line appears at the right edge of the column to mark the Auto Return at that column. Whenever you tab out of this column, the cursor moves to the first cell in the next row.

3. To remove Auto Return, repeat the process in the Auto Return column.

    The colored line disappears and Auto Return is no longer set for the grid.

Customizing the Appearance of the Grid

You can customize the colors and fonts in the grid. You can do this to highlight specific information or to adjust for personal preferences. Also, you can change the magnification of the grid to increase the number of rows you can view at the same time or to bring important information into focus.

► To change fonts for a grid

You can change the fonts for individual columns or for the entire grid.

1. On any form with a grid, in the column for which you want to change the font, right-click to display a pop-up menu.

    The cursor can be anywhere within the grid if you are changing the font for the entire grid.

2. From the pop-up menu, perform one of the following:

    •   Choose Column and then Font to change column fonts.

    •   Choose Grid and then Font to change grid fonts.

    The cursor must be on the column title to change the font of the title.
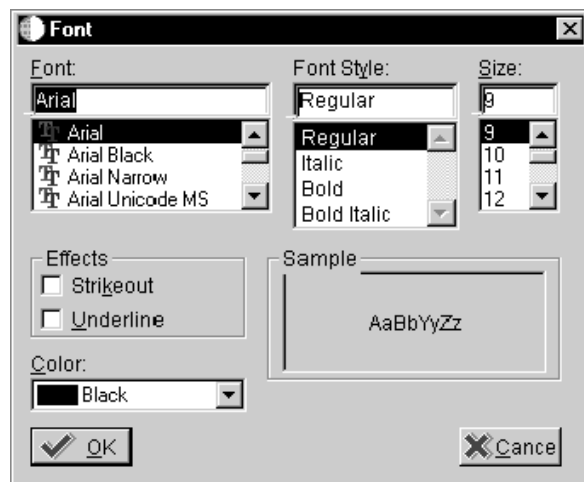
3. On Font, choose a font and any additional attributes, such as style, size, color, and effects.

4. Click OK.

► **To change the background color for a grid**

You can change the background color for individual columns or for the entire grid.

1. On any form with a grid, in the column for which you want to change the background color, right-click to display a pop-up menu.

   The cursor can be anywhere within the grid if you are changing the background color for the entire grid.

2. From the pop-up menu, perform one of the following:

   • Choose Column and then Color to change the column colors.

   • Choose Grid and then Color to change the grid colors.
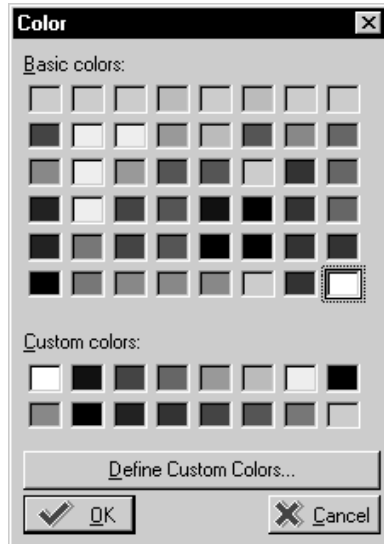
3. On Color, choose a color and then click OK.

► **To change the magnification of a grid**

1. On any form with a grid, right-click in the grid to display a pop-up menu.

2. From the pop-up menu, choose Grid and then Zoom.
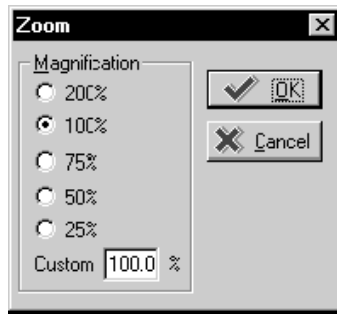
3. On Zoom, choose a preset percentage from the Magnification box or complete the following field:

   - Custom

4. Click OK.

Freezing Columns and Rows

Freezing allows you to lock specific columns and rows into place so that they do not disappear from view while you scroll through wide and long lists respectively. You can also freeze just the column title so that no actual records freeze. The system shows the frozen area with a heavy red line.

► To freeze columns and rows

When you freeze a row, all columns and rows above the row and to the left of the column become locked in place. A red line appears to mark the frozen area. Also, you can freeze only the columns in the grid by performing the following tasks on the column title. However, to freeze any number of rows, you must freeze at least one column.

1. On any form with a grid, in the column and row you want to freeze, right-click to display a pop-up menu.

2. From the pop-up menu, choose Column and then Freeze/Unfreeze.

   A red line appears at the right edge of the frozen column and the bottom edge of the frozen row.

3. To verify the change, scroll to the right and scroll down.

   The frozen columns and rows remain in view.

► To unfreeze columns and rows

1. On any form with a grid, click the right mouse button to display a pop-up menu.

2. From the pop-up menu, choose Column and then Freeze/Unfreeze.

   The red lines disappear.

3. Test the system by scrolling to the right.

   Previously frozen columns now scroll out of the form.

Maximizing the Grid

You can maximize the grid to fill the parent window. The menu bar and toolbar remain visible above the grid. Restore the grid to return the form to its default appearance.

► **To maximize the grid**

1. On any form with a grid, click the right mouse button to display a pop-up menu.

2. From the pop-up menu, choose Grid and then Maximize/Restore.

   The maximized grid expands to fill the parent window.
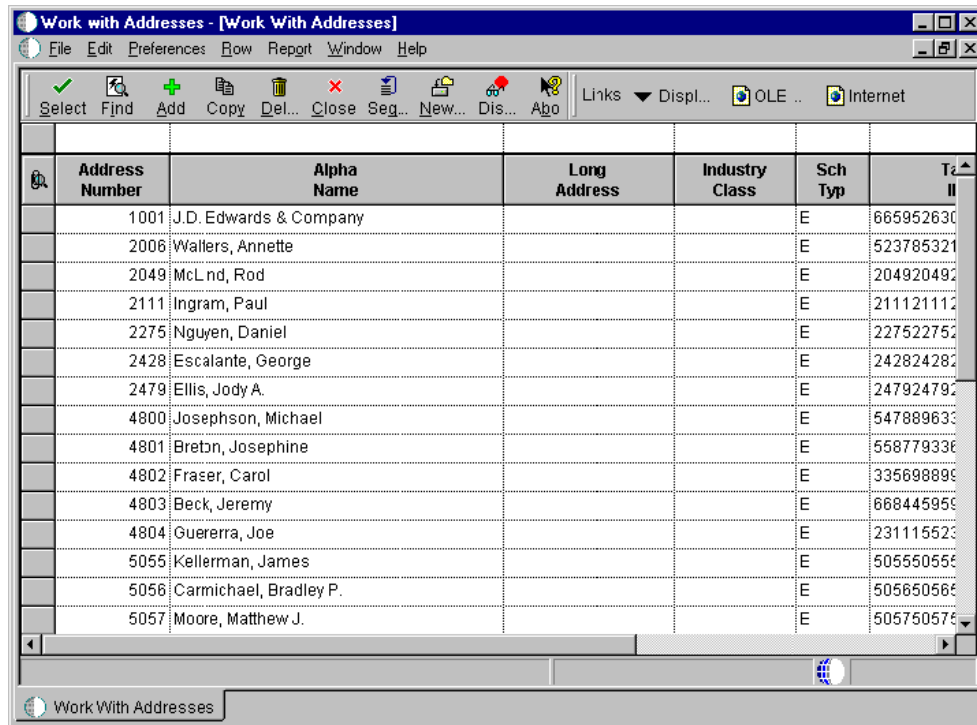
3. Maximize or resize the parent window to display more of the grid.

► **To restore the grid**

1. On a form with a maximized grid, click the right mouse button to display a pop-up menu.

2. From the pop-up menu, choose Grid and then Maximize/Restore.

   The form restores its default settings.

   Your form also restores its default settings when you close the form and then reenter.

Exporting Data from the Grid

You can export the contents of the grid into a third-party spreadsheet or word processing application. You also have the option to establish a hot link between an input-capable grid

and a third-party spreadsheet. A hot link allows you to update data in two connected applications simultaneously. Thus, when you update data in your OneWorld grid, your third-party spreadsheet data of that grid is also updated. If the OneWorld grid does not allow you to enter information into it, you cannot establish a hot link with it.

OneWorld might offer a third-party application that you do not have installed on your workstation. If you try to access this application to export data, a message box appears to inform you that the application is not available on your workstation.

▶ **To export data from the grid**

1. On any form with a grid, click the right mouse button to display a pop-up menu.

2. From the pop-up menu, choose Export and then choose a third-party application from the menu.

   If you choose a spreadsheet application, the following Export Assistant form appears.

   If you choose a word processing application, the following Export Assistant form appears:

3. As necessary, complete the following:

- Establish a "Hot Link" to a third-party spreadsheet if the OneWorld grid is input-capable. Otherwise, the hot link checkbox is disabled.

- Export to a New Workbook.

- Export to an Existing Workbook.

- Specify a worksheet name to export to.

- Specify a spreadsheet cell address field.

4. On the grid, choose the range of cells to export.

5. Click Continue to begin the application and export the chosen data.

Importing Data into the Grid

You can import data from third-party spreadsheet applications into an input-capable OneWorld grid. You also have the option to establish a hot link between a third-party spreadsheet and an input-capable OneWorld grid. A hot link allows you to update data in two connected applications simultaneously. Thus, when you update data in your third-party spreadsheet, your OneWorld grid is also updated.

OneWorld might offer a third-party application that you do not have installed on your workstation. If you try to access this application to import data, a message box appears to inform you that the application is not available on your workstation.

You must specify a range of cells to import from the third-party application into the grid. The convention that you should follow when you specify this range is "Ax:Bx." For example, to import a range of cells between cell D3 and cell G6, you need to type "D3:G6."

► **To import data into the grid**

1. On any form with an input-capable grid, click the right mouse button on the grid to display a pop-up menu.

2. From the Import menu, choose a third-party application.
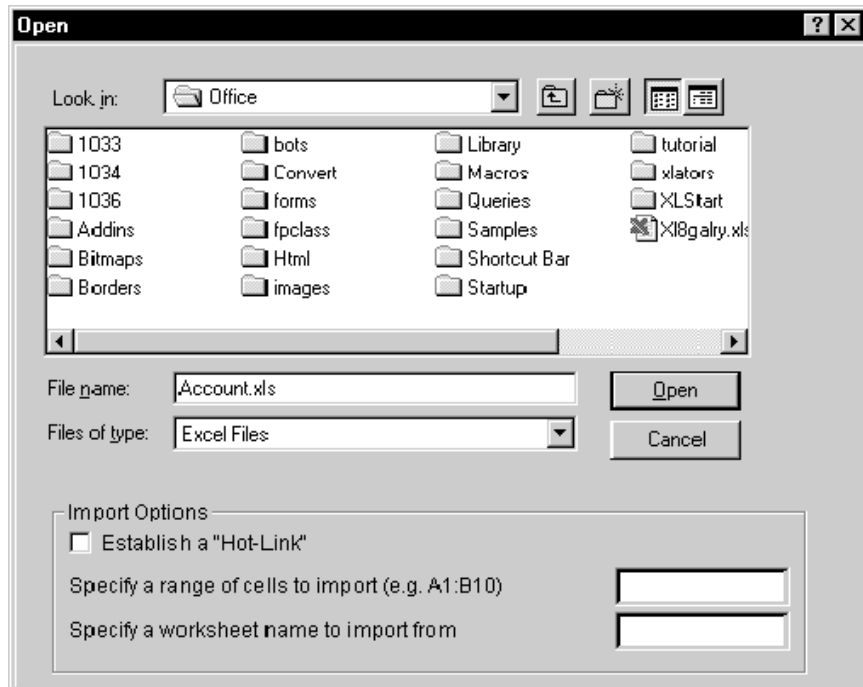
3. On Open, complete the following:

- File name

- Specify a range of cells to import

- Specify a worksheet name to import from

4. If necessary, complete the following:

- Files of type

- Establish a "Hot Link"

5. Click Open to send the data to the OneWorld grid.

   Locked cells do not accept imported data.

Printing the Grid

You can print the contents of the grid directly to a printer. You can specify ranges of cells on forms where you can select more than one row. In addition, you can adjust margins for your printout.

► **To print the grid**

1. On any form with a grid, click the right mouse button to display a pop-up menu.

2. From the pop-up menu, choose Grid and then Print.
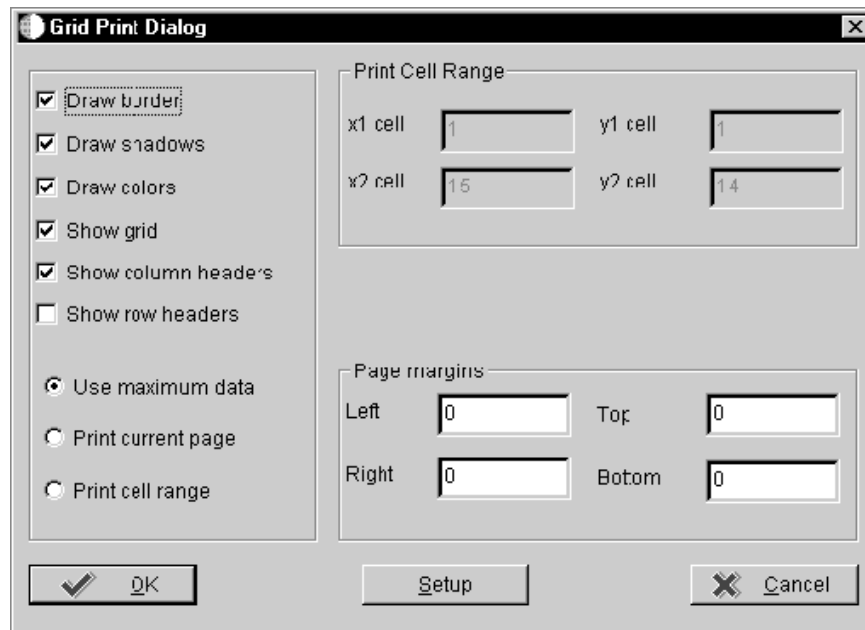
3. On Grid Print Dialog, click one or more of the following printing options:

- Draw border

- Draw shadows

- Draw colors

- Show grid

- Show column headers

- Show row headers

4. Choose the range of data that you want to print from the following options:

- Use maximum data (default)

- Print current page

- Print cell range

5. If necessary, do the following:

- Click the Setup button to change the default printer or modify additional printer settings.

- Adjust the page margins.

6. Click OK.

Creating Charts and Graphs in a Grid

You can create charts and graphs in the grid of any form to provide a graphical view of your data. By selecting different types of data to chart, you can easily view differences and relationships between certain items.

► **To create charts and graphs in a grid**

1. On any grid with an established grid format, click the right mouse button to display a pop-up menu.

2. From the pop-up menu, choose Format and then New Format.

3. Enter the name for the format.

4. Choose Chart/Graph as the type and then click OK.

   For each format that you create, a tab appears at the top of the grid. Chart tabs contain a graphic icon.

   The Chart Assistant form appears.

5. On the grid, select the range of cells that you want to use as data to graph.

   Row data in the first column is always used for labelling the X or Y axis.

6. On Chart Assistant, click Continue to draw the graph.

   A graph appears.
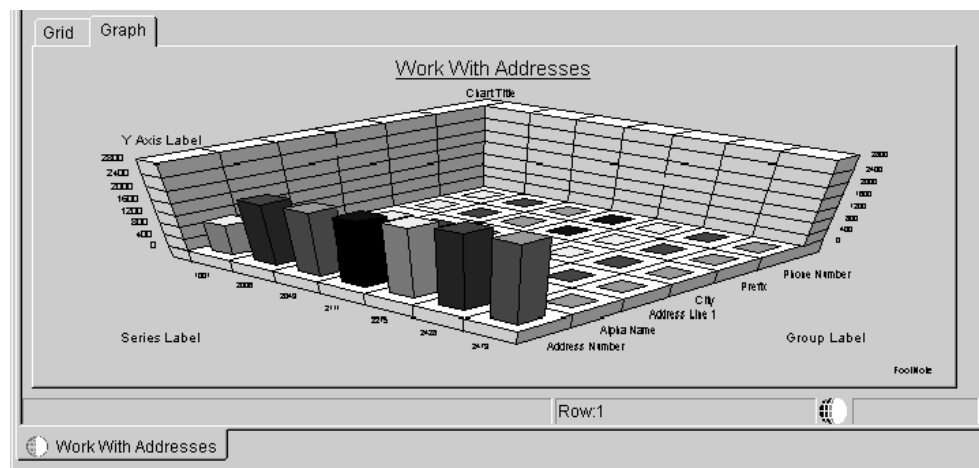
Customizing Charts and Graphs in a Grid

After creating a new chart or graph format, you can customize the new format by changing its type, dimension, rotation, and text. However, you cannot change text labels that contain information directly extracted from a record in the grid. OneWorld copies the information from this label directly from the grid record.

► **To customize charts and graphs in a grid**

1. On the graph, double-click any text on the graph to access the Chart Text Attribute form.

2. On Chart Text Attribute, complete the following field:

   - Text

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3. Click the Font button to access a form where you can change the font properties for the label.

4. When you finish working on Chart Text Attribute, click OK to return to the graph.

5. On the graph, right-click to choose one of the following graph types from the menu that appears:

   - Line

   - 3D

   - Area

   - Pie

   - Histogram

   - Percent Bar

   - Pie Bar

   - Side by Side Bar

   - Stacked Bar

   - Scatter

   For 3D formats, additional formatting choices are available:

   - Preset Angles:

     - Standard

     - Long Narrow

     - Bird's Eye

     - Distorted

   - Custom Angles (currently inactive)

   - Cube Color

   - Show 3D Tool

   - Hide 3D Tool

   If you choose 3D, the 3D menu appears.

6. On the 3D menu, choose Show 3D Tool.

   The 3D Tool form displays the 3D Rotation controls.

3-D Rotation
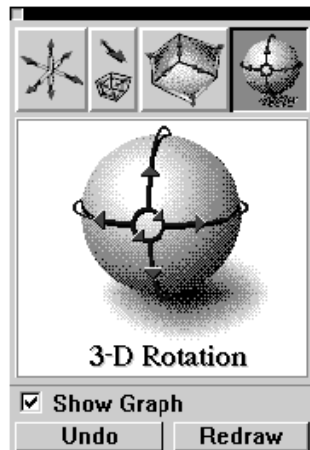
7. On the 3D Tool, click the red arrows to adjust the outline of the graph.
8. Click the Redraw button to apply changes.

   The row of buttons at the top provides access to additional controls:

   • 3D Movement

3-D Movement
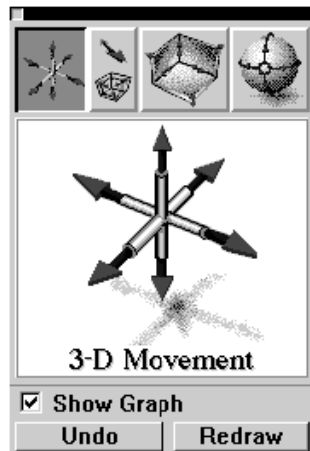
   • 3D Zoom, 3D Perspective, and 2D Pan
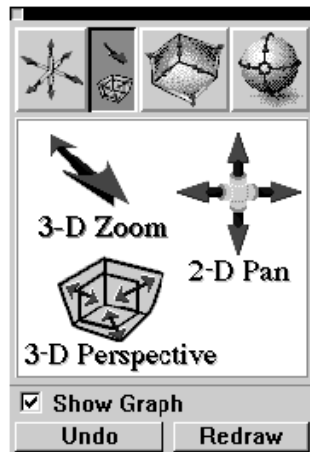
- 3D Box Proportions
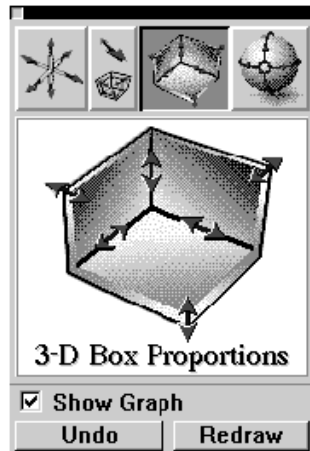
User Overrides

User Overrides Revision (P98950) allows you to change the appearance of an application to fit the needs of your business. For some user overrides, such as an object linking and embedding (OLE) attachment to a form, no consequences exist when you upgrade your OneWorld software because your user overrides are merged into the new release. For other user overrides, such as grid or toolbar formats, OneWorld gives you the option to try to reconcile your user overrides with the new software, or you can delete your user overrides.

Understanding User Overrides

A user override changes only the appearance of an application. It does nothing to the application's functions. You can set overrides by user ID, group ID, or the keyword *PUBLIC. If you set your override by user ID, only that user is affected when he or she signs onto any workstation in the enterprise. If you set your overrides by group ID, those users who are set up within User Profiles to be members of that group are affected. If you set your user overrides by *PUBLIC, all users in the enterprise are affected. After you create an override for a group ID or *PUBLIC, each employee inherits that override, regardless of the workstation he or she signs onto. Even with group or *PUBLIC overrides, each employee can further customize a version to fit individual needs. For example, if someone in a department has trouble seeing text on a form, he or she can switch to a larger font. This change applies only to the individual, and not to the entire group or company.

OneWorld stores these modifications in the User Overrides Table (F98950). Because OneWorld tracks the overrides by your user ID or group ID, the modifications will appear on any workstation that you sign on to. User Overrides allows you to make the following modifications:

- Resequencing the grid

- Changing the sort order of rows and columns

- Freezing columns and rows

- Moving and resize columns and rows

- Changing the magnification and font size

- Adding charts and graphs to an application, and embedding third-party products that support OLE automation

The following overrides are only local. They could be considered workstation preferences. The system stores these overrides on your workstation. Therefore, they are accessible only from that particular workstation:

- Sizing of the parent and child windows

- Changing the parent window

- Changing fonts on a form

- Maximizing the form

- Turning on the exit bar

Search Hierarchy

During the execution of an application, the system uses a search hierarchy to locate a user override. The system searches by user and group for each unique combination of application, form, version, and language in the following order:

User ID When you access a specific application, the system searches for an override for the application under your user ID first.

Group If the system does not find an override under your user ID for the application, it then searches for it at the group level. For example, if you are in the Accounts Payable group, the system searches for an override for that group.

*PUBLIC If the system does not find an override for the application at the group level, it searches for it under *PUBLIC. If no override is found at the *PUBLIC level, the system uses the default No Overrides.

Cached Override Information

The first time that a user opens a OneWorld application form, the system reads the User Overrides Table (F98950) and creates a disk cache on the workstation. This table contains form-specific information such as menus, buttons, and formats. This cache serves to improve OneWorld network performance because multiple database fetches are not required to retrieve the individual form elements.

However, if a system administrator or the user modifies user overrides using the User Overrides Revision (P98950) application, the override information is written directly to the F98950 table, and not to the cached table. Because OneWorld always reads overrides from the cached information, any modified user overrides cannot become effective until the user exits and reenters OneWorld, causing the cached table to be refreshed.

For example, assume that you want to modify a journal entry by adding tabs and having those added tabs associated with your user overrides. First, create the tab and then use the P98950 application to associate the tab with your user profile. However, you will not be able to immediately see any records of the journal entry form because the user override is stored in the User Overrides Table. But OneWorld is looking at the cached information. The cached information can only be refreshed by exiting OneWorld and restarting. This process does not affect your ability to create and use local form changes, or workstation preferences, that are not stored in the F98950 User Overrides Table.

If, for some reason, you have two users who share the same user ID, be aware that OneWorld does not share user override records. If both users sign onto OneWorld at approximately the same time, the first of these two users to sign on sees the user overrides while the second user to sign on does not. Furthermore, the first user to make an override change during simultaneous sessions takes control of the F98950 record, and all other users signed onto the same user ID are locked out.

Working with User Overrides

You can create user overrides for a user ID, group ID, or for *PUBLIC. After you create a user override, your user override will be available on any workstation that you sign on to in the enterprise.

If a form for which you have created user overrides has changed after upgrading your software, OneWorld attempts to merge your user overrides with the changed form. You

might, however, need to reset your user overrides, or at the least, verify that your user overrides are still intact.

Creating User Overrides

You can create individual user overrides in which the changes that you make to an application reside on an enterprise server and are associated with your user ID. This override is available to you at any workstation that you sign on to. To create a group override, you first create an individual override, and then you change that override to a group override, thereby making the override available to employees within a group or to the entire company (*PUBLIC).

▶ **To create an individual user override**

1. Choose the application for which you want to create an override (for example, Standard Voucher Entry).

2. Modify the application (for example, rearrange columns or rows on the grid). When you exit the application, the preferences that you just set up are stored in User Overrides under your user ID.

   See *Application User Interface* for more information on how to modify applications.

▶ **To change an individual user override to a group user override**

1. On the System Administration Tools menu (GH9011), choose User Overrides (P98950).
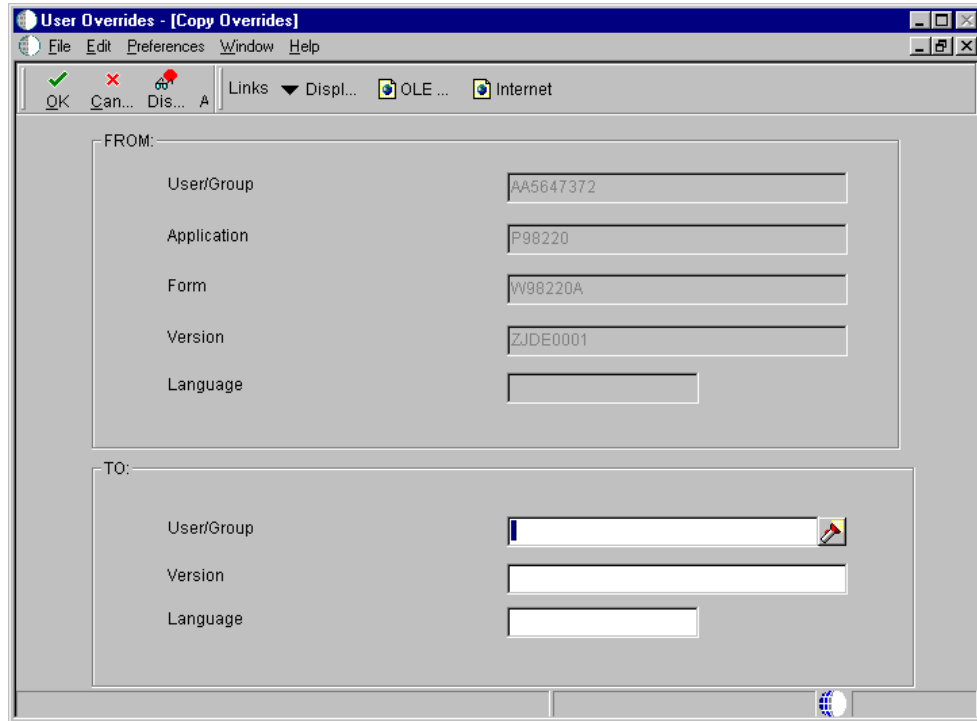
2. On Work With User Overrides, locate and choose the individual override record that you wish to make available to a group.

Note

Be sure that you choose the correct type of override. The two types available are GF for grid tab format overrides, and HC for menu and toolbar overrides. For example, to deploy a grid tab to other users, you need to choose a GF record, whereas, to deploy a changed menubar or toolbar, you need to choose an HC record. On the Work With User Overrides form, scroll to the right to see the override type.

3. Click Copy.

4. On Copy Overrides, enter information in the following fields:

   - User/Group

     Enter either a valid group, which has been set up in User Profiles, or *PUBLIC to copy the user override to a group or the entire company.

     If you want to change a J.D. Edwards demo version and want the copied version to use the same user overrides as the demo version, do not change the User/Group, but name the version to represent your custom version.

   - Version (optional)

     Enter the version name to copy user overrides set up for one version to another version. User Overrides does not create versions.

   - Language (optional)

     Enter a valid language code to select the user override language for the specified user and application.

5. If you copied and modified the version, delete the individual user record that you copied. Deleting this record ensures that when you sign in, you are viewing the overrides for the group that you are in, not the override that is specific to your user ID.

Note

The system creates a record for each form that you modify.

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6. Click OK.

Fixing User Overrides after a Form Change

When you install a package on your workstation, you might have a discrepancy between the changed forms included with the new package and the grid, menu, or toolbar user overrides that you made before the installation. For example, a new column might have been added to a grid for which you have user overrides. After the package installation, the first time that you access the changed form, OneWorld detects the discrepancy between the newly installed form and your existing user overrides. OneWorld asks if you want to fix your user overrides to include the new column or delete your user overrides altogether. If OneWorld cannot fix the discrepancy between the changed form and your user overrides, OneWorld automatically deletes your user overrides.

OneWorld performs this fix only for grid, menu, or toolbar user overrides because all other user overrides, such as an OLE attachment to a form, do not interfere with changes to a form.

► **To fix user overrides after a form change**

The first time that you access a form after a package installation and have a discrepancy between the newly installed form and your user overrides, a message box appears. This box prompts you to either delete your user overrides for that form or have OneWorld try to fix your user overrides to match the changed form.

On the message box that appears, perform one of the following:

- To delete your user overrides, click Delete.

  OneWorld deletes your user overrides for that form. You can add your overrides again by following the process of creating user overrides.

- To try to fix your user overrides, click Fix.

  OneWorld tries to merge the changes from the newly installed form with your user overrides for that form. If successful, verify that the form works properly with your user overrides. If there is anything wrong with the grid formats or menu and toolbar customization after OneWorld tries to fix the discrepancy, you should delete your user overrides for that form. On the Work With User Overrides form, choose your overrides and then click Delete.

  If OneWorld is unable to merge the changes with your user overrides, OneWorld automatically deletes your user overrides for that form. You can add your overrides again by following the process of creating user overrides.

Records

Databases store information in units called *records.* Each record might contain more than one item of information. For example, Dominique Abbott is an item of information in OneWorld. When you access Dominique Abbott from the Address Book application, the record that appears may also include her phone number, address, and other pertinent information. OneWorld might save all of this information as one record, or it might save some of this information as a primary record and other information about Dominique Abbott as secondary records. These types of relationships exist throughout OneWorld.

Database tables store all OneWorld records. Each record must have at least one key that links the record to a database table. Keys function as unique identifiers to distinguish one record from another. For example, Address Book uses Address Number as the key to distinguish each record. Therefore, each Address Number must be unique. When creating new records, you must enter information into a key field. If you do not enter information into a key field, OneWorld displays an error message. Once you have entered information into a key field, you cannot edit that key field later. To change the key field information, you need to create a new record.

The Media Objects feature allows you to add notes, graphics, and other objects to records. For example, you can use a note to explain special circumstances surrounding a journal entry. You can also attach drawings, animations, and other types of objects to records.

Locating Records

To locate a record, use the grid on the Find/Browse form. The grid displays one or more records when you perform a search. By examining the information displayed in the grid, you can identify the records that you want to review, copy, update, or delete. Records that match your selection criteria appear in the detail area below the column titles.

You can locate all associated records from any Find/Browse form by clicking on the Find button and then scrolling down the list of records. OneWorld loads records one page at a time to improve performance. Only the records that you see in the grid have been retrieved. When you scroll down, OneWorld retrieves new records. Depending on how many records that you have and on your system resources, loading every record might take a long time. However, OneWorld allows you to filter your records by narrowing and defining the criteria for your search. The following list provides examples of how to define your search criteria:

- Use the filter fields at the top of the form. For example, you can enter information in a filter field to search only for employee records.

- Use the query-by-example line to search in one or more columns based on criteria such as a specific name and address number, or a range of names and numbers.

- Refine your search in the filter fields and the query-by-example line using a wildcard.

Locating Records Using Specific Selection Criteria

Selection criteria defines your search by specific types of records. For example, you can include information in filter fields such as Name Search and Search Type to search for only employees whose names start with the letter "A."

► To locate a record using selection criteria

1. For example, on Work With Addresses, complete the following field:

   • Search Type

   If you do not know the Search Type, use the visual assist Search button to view a list of user defined codes.

2. Click the Find button.

   A list of matching records appears.

See Also

❑ *Working with Visual Assists* for information about the visual assist Search button

Using the Query-by-Example Line

You can use the query-by-example line to search for records by a grid column. For example, if you are searching for a person by name, enter all or part of the name in the query-by-example line directly above the Alpha Name column in the grid.

The information that you enter in the query-by-example line must be a valid value for the column. If it is not, the system will not find a match. You cannot enter values in the disabled (grayed-out) columns because these columns do not allow searches.

Some query-by-example lines in OneWorld work differently. On certain forms in OneWorld Tools, after filling in one or more fields, the act of tabbing to the end of the line acts in the same way as clicking the Find button.

► To use the query-by-example line

On any Find/Browse form, type the characters on which you want to search in the corresponding column of the query-by-example line, then click Find.

The record that matches the query criteria appears in the grid.
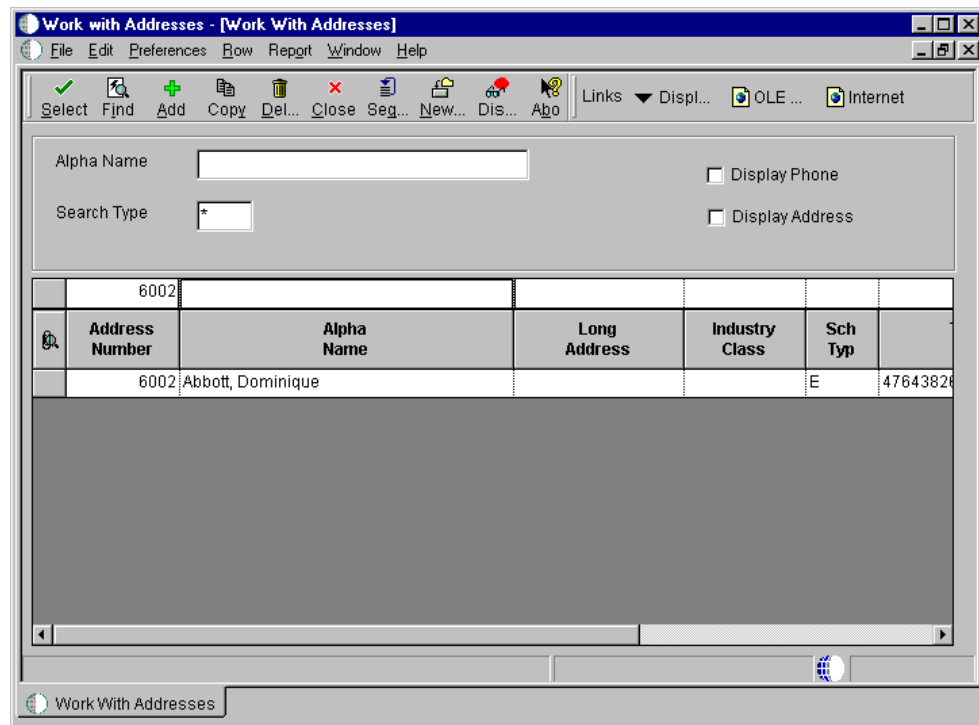
Locating Records Using Wildcards and Operators

You can use the asterisk (*) as a wildcard character in place of one or more letters. Using the asterisk widens your search. For example, you can type "abb*" in the alpha name column of the query-by-example line to view all records that begin with the letters "abb." Or you can type "*bb*" in the query-by-example line to retrieve records with those letters in the middle of the names.

In addition, you can search for values in a set using operators. For example, in the Address Number column of the query-by-example line, type "<87" to specify address numbers less than 87. Type "<b" in the Alpha Name column of the query-by-example line to specify names beginning with "a".

The following operators are valid on the query-by-example line:

<   Less than

< =   Less than or equal to

>   Greater than

> =   Greater than or equal to

!   Not equal to

Each time that you enter values in a search, click the Find button to retrieve matching records.

The following illustration shows the matching records of the operator entered into the query-by-example line:
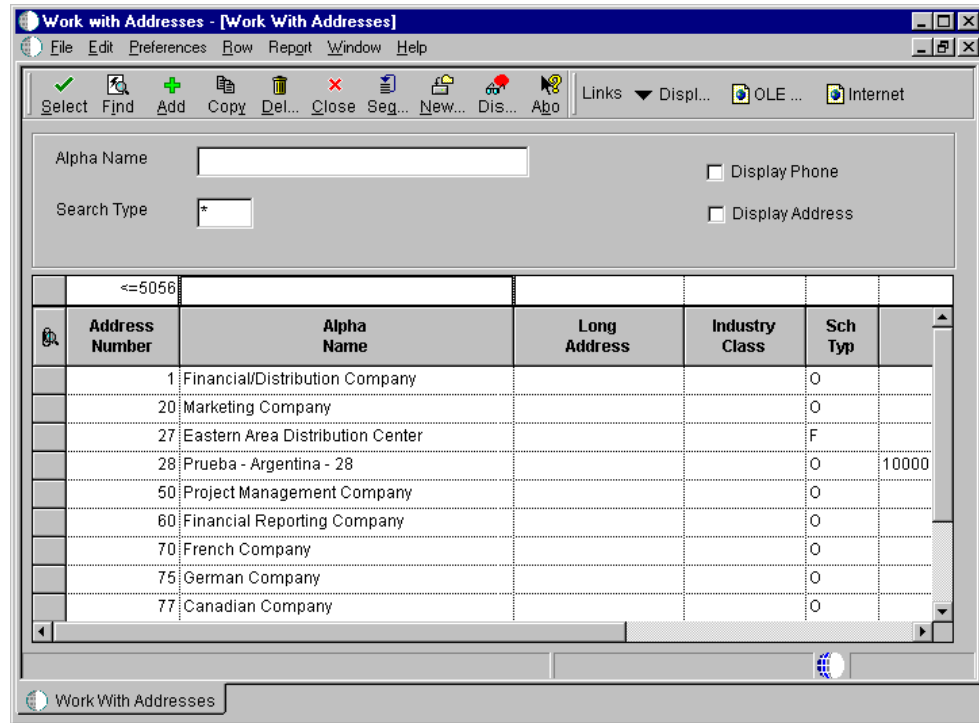
Working with Records

Records are often related to one another within J.D. Edwards applications. Many of these relationships depend on one another. In other words, you can change primary records by adding, deleting, and saving the information located on the secondary records or the records themselves. For example, you can have a primary or master record that contains an employee's name and address. Additional information, such as his or her phone numbers, exists in a secondary record.

Primary Record
Address Book #0938
Joe Jones
342 Elm

Secondary Record
Phone Numbers
837-3928 Home
783-9816 Car

Secondary Record
Who's Who
Joe Jones
President

Secondary Record
Category Codes
Region: DEN
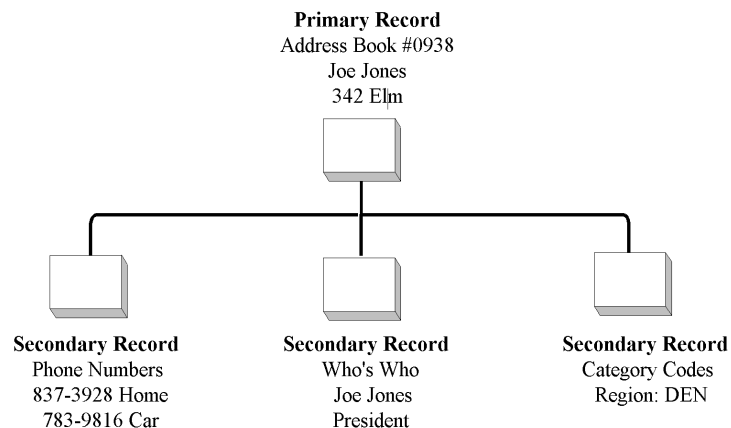
J.D. Edwards software is event-driven, which means that actions, such as clicking on a button, tabbing to a field, or selecting from a menu or list, can alter your data. However, changes to the database are not saved until you exit a form by clicking OK or pressing Enter. Information that you change on related forms is not saved until you enter those changes in the previous form and click OK to accept them.

When you work with records, you should be aware of the following considerations:

Primary and secondary relationships

When adding records to the database, you add the primary record first and then add the secondary records. It is important to remember that primary records must be in the database before you can add a secondary record to the database.

Working with records

The process for changing, adding, and deleting records is consistent throughout the system. Two types of forms on which you can make these types of changes to your database exist:

- A single-record form, such as Address Book Revision
- A multiple-record form, such as Phone Numbers

Adding

When adding a record, if it contains a Next Numbers field, the number is added automatically.

When adding records to a Find/Browse form, you click Add. Complete the blank form that appears. Click OK when completed.

Any required field that you do not complete will highlight in red when you finish adding the record.

Changing

If a field is protected, such as Address Number on Work With Addresses, you cannot change it.

Copying

When copying a record, the system does not copy all the fields to the new record. In order to make the record unique, the system changes certain fields for the new record.

Deleting

In a Find/Browse form, such as Work With Addresses, choose the row that you want to delete and click Delete. The system prompts you with a series of confirmation messages for each row that you select to delete.

In a multiple-record form, such as Phone Numbers, you must choose the entire row in the grid to remove that row.

You cannot delete a record from a single-record form such as Address Book Revision. You can delete only from the grid.

Depending upon which application you are in, when you delete a parent record, the system deletes the information from related forms. See the application guide for information about deleting child records.

Dates

The system validates dates according to your user profile. You can assign your user profile either Windows or J.D. Edwards software settings.

Tabbing out of required a field

When you tab out of a required field, the system validates the field. If it is not correct, you get an error message.

User defined codes

The system validates user defined codes against the user defined code table.

Account numbers

The system validates account numbers against the account number table.

Choosing a Record
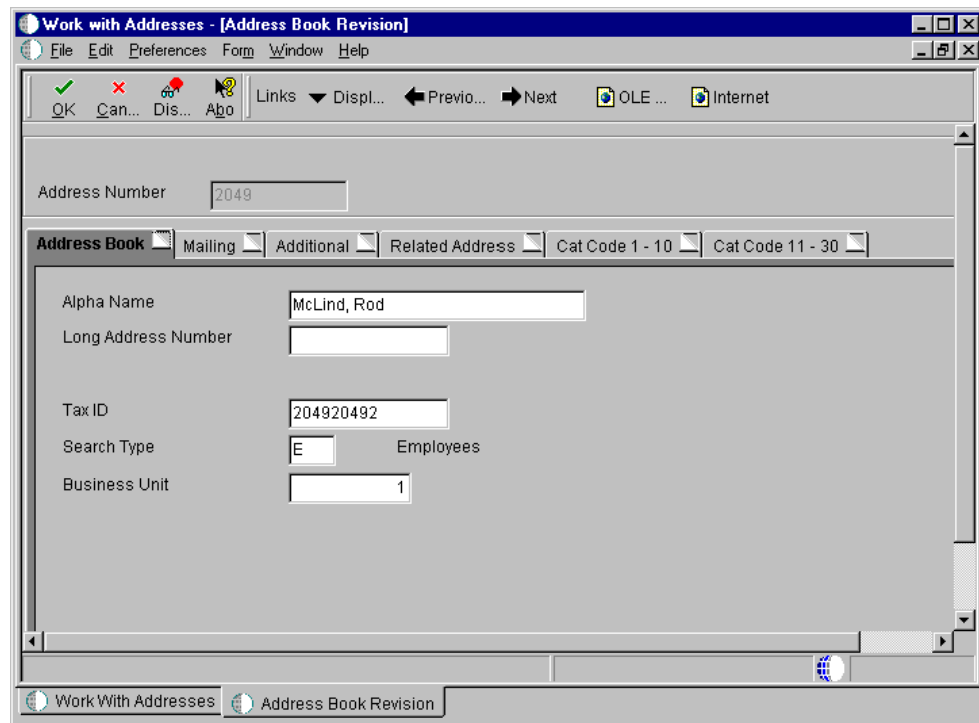
You choose a record for a variety of reasons. For example, you might need to change an employee's address and phone number. You can choose a single record or multiple records from the Find/Browse form, and then change the information on a Revision form.

You can choose a record in one of two ways:

- Click the record and then click the Select button to open the corresponding form.

- Double-click a record to select it and open the corresponding form.

► To choose a record

1. On any Find/Browse form, locate a record.

2. Double-click the record to display it on a revision form.

3. On the revisions form, revise the record and then click OK.

   If you selected more than one record, your second record might appear now. If your second record does not appear, click the Next button at the top of the form. Continue to revise as needed.

4. After you finish, be sure to click OK to save your latest revision and then click Cancel to exit.

See Also

- ❑ *Locating Records* for information about the different methods for finding a record or a set of records

Adding a Record

When adding records to the database, you add the primary record first and then add the secondary records.

► **To add a record**

1. On a Find/Browse form, click Add to open a blank revision form.

2. Enter the information for the new record.

3. Click OK.

When you add records, OneWorld uses the Next Numbers feature to automatically number Address Book records, journal entries, purchase orders, and other documents.

Changing a Record

In OneWorld, when you request an application, a Find/Browse form appears. On the Find/Browse form, you select the action that you wish to perform. Selecting a button or function that you wish to perform displays, for example, a Fix/Inspect form on which you can change your record.

As you move from field to field, you can view your changes reflected in the form. If you type an invalid value in a field, the field highlights red and an error appears. You must correct the error before you click OK. Clicking OK saves your changes in the database.

You cannot change information on the Find/Browse form itself. The information you have changed appears after you select the appropriate button on the Find/Browse form.

► **To change a record**

1. On a Find/Browse form, choose a record.

   You can double-click a record, or choose a record and then click the Select button.

2. On the revisions form, revise information as needed.

3. Click OK to accept the revisions.

Deleting a Record

Occasionally, you might need to remove a record from your database. For example, you might no longer use a particular supplier. Depending upon the application, if you delete a primary record, OneWorld may also delete any secondary records related to the primary record, such as phone numbers. See the application guide for information about deleting child records.

► **To delete a primary record**

1. On a Find/Browse form, choose one or more records.

2. Click Delete.

   The system prompts you to confirm the deletion.

Messages and Queues

With OneWorld, you can send and receive electronic mail (e-mail) messages. OneWorld electronic mail includes messages sent by OneWorld users, people outside of your OneWorld system, and messages sent by a workflow process. You can organize your messages by placing them into queues (storage areas for your messages) provided by OneWorld or by setting up your own queues. The Work Center is the OneWorld application that manages messages and allows you to place your messages into queues. This section explains how to work with your messages and with your queues. In addition, you can also indicate your work-time location and add remarks to your time log.

Note

For Web-based users, the Work Item Manager (P012503) is the HTML application that allows users to manage messages and queues and work with internal e-mail.

Understanding Messages and Queues

The Work Center application provides electronic mail (e-mail) services within OneWorld. Using this application, you can send and receive e-mail messages and organize your messages within the storage areas called queues.

Understanding Messages

Messages are electronic mail (e-mail) items that are either internal or external to OneWorld. Messages can be sent by another person or by an application's workflow process.

See the *Enterprise Workflow Management* documentation for general information about the workflow process. See your application's guide for specific information about a particular workflow process, such as the credit limit approval process.

Internal and External Messages

J.D. Edwards software categorizes and processes your e-mail messages in different ways, depending upon whether the message is J.D. Edwards software internal or external.

Internal Messages	Internal messages are sent to and received from individuals within J.D. Edwards software using the Work Center.
External Messages	External messages are sent to and received from individuals either within J.D. Edwards software or from outside of J.D. Edwards software. External messages are sent and received using third-party e-mail software packages such as Microsoft Exchange or Microsoft Outlook.

Message Routing

The following scenarios explain where database messages are stored, depending on whether the messages are routed internally or externally from J.D. Edwards software. Internal messages are routed through the J.D. Edwards software message system while external messages are routed through the J.D. Edwards middleware package called JDEMail, which is Extended MAPI compliant and is used to interface with third-party external mail products. See *Setting Up External Mail Preferences* for information about setting up a third-party mail product for J.D. Edwards software messages.

Sender to Receiver	Description
Internal to Internal	The system routes a message internally using the Work Center. All of these messages are stored in the J.D. Edwards software database.
Internal to External	The system stores and routes a message externally using the Work Center because the receiver has an external mail preference. The message is stored in the J.D. Edwards software database because it was originally an internal message.
External to Internal	The system stores and routes a message internally using the Work Center, even though the sender might have an external mail preference set up. The system recognizes that the sender has a J.D. Edwards software address book record and, therefore, bypasses routing the message unnecessarily through the mail server. The message is stored in the J.D. Edwards software database.
External to External	The system routes the message externally using a third-party e-mail product. The sender and receiver must each have an external mail preference set up for a message to be considered an external e-mail message. The message is stored in the third-party e-mail database.

The following graphic shows how J.D. Edwards software routes and stores internal and external messages:

Employee Work Center

Send or receive internal message

Send or receive external message

PPAT Message Control (F01131)

PPAT Message Detail (F01133)

Media Objects Storage (F00165)

Mail Server (JDEMail with Extended MAPI/SMTP)

Third-party e-mail Product
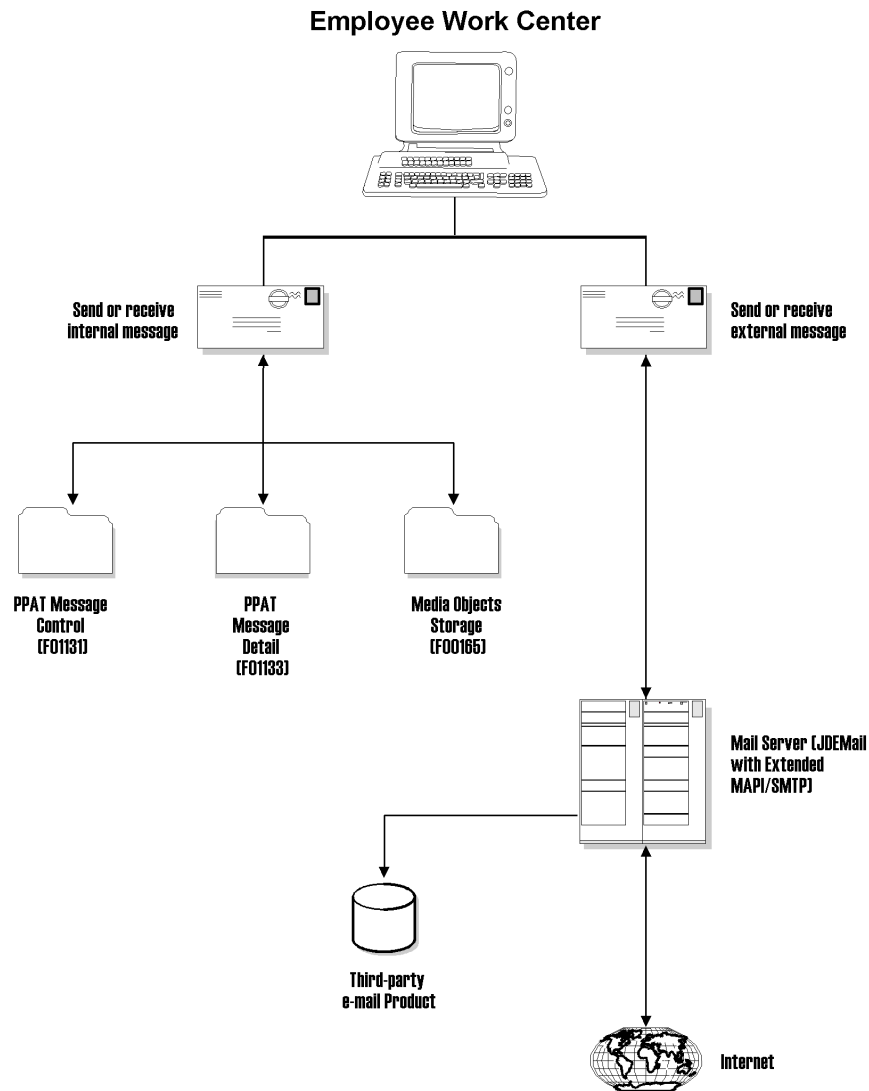
Internet

Workflow Messages

The standard internal and external messages are sent by users, but a type of message called an action message is sent automatically as part of a workflow process.

Action Messages

Workflow processes sometimes generate messages that require you to take action, such as approving or rejecting a change to a customer's record. A lightning bolt icon identifies an action message. Action messages can also act as informational messages that tell you about purchase orders that need to be approved or accounts receivable credit checks that need to be researched.

Action messages contain a shortcut icon that links directly to an application. When you click the shortcut icon, the system retrieves the most current information from the database. This purpose ensures that you get accurate information even if there are changes after an action message is sent to you.

You can send action messages to specific queues.

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Understanding Queues

Queues are storage areas that allow you to organize messages using the Work Center. For example, messages can be organized into queues for priority mail, Internet messages, or for submitted jobs. Through a queue, users can approve or reject certain activities in a workflow process. A queue is actually a user defined code, and you set up a queue in the same way as you would set up any user defined code.

Queues Provided with J.D. Edwards Software

J.D. Edwards software provides the following queues:

Sent — Messages that you have sent to others.

Deleted — Messages that you have deleted. After you delete a message, you can view it, but you cannot move it to another queue.

The system administrator has the authority to purge deleted messages from the system, which is typically done on a periodic or predetermined schedule. You can also remove a message from the system by deleting it from your Deleted queue.

Internet Messages — Messages sent to you from an external mail source.

Submitted Jobs — Messages generated by the system for jobs that you have submitted for batch processing, such as the General Ledger Post.

Action — System-generated messages, such as purchase order approvals and General Ledger Post error messages. These messages require you to take action. The system sends them directly to an action queue, making them easier to manage.

Workflow Queues

Workflow includes several predefined queues, but you might want to set up a custom queue for messages generated by processes that you create. For example, you might want to set up a queue for messages generated by a credit limit approval process. This queue would gather any approval or rejection messages related to credit limits for customers. A user can then open that queue and act on the message contained within it.

You can set up the following types of custom queues for a workflow process:

- Queues for categorizing and grouping purposes. For example, you can set up a queue to collect messages regarding credit management information.

- Queues with a shortcut to a OneWorld application. This shortcut opens a OneWorld application that is assigned to that queue and related to the function of that queue. For example, you can set up a queue that is linked to the Customer Master application (P03013), where you can verify a customer's credit limit.

Queue Security

You can change the security status for a user or group of users within a queue. You can either give a user authority to monitor everyone's queues within a group, or you can deny users access to certain queues.

You can add security by user, by distribution list, or both. For example, you might want to set up security so that a manager can monitor all messages within certain queues. Or you might set up security by distribution list only so that users within a distribution list have authority to

monitor certain queues. If you want to give only a few people within a distribution list access to certain queues, you enter the distribution list and the users' address book numbers to define which queues those users in a particular distribution list can access.

Working with Messages

Use the Work Center to send and receive internal electronic mail (e-mail) messages within OneWorld, or to send and receive external messages within and outside of OneWorld. When sending external messages, you use a third-party e-mail software product that you access from the Work Center. You can also revise messages, reassign messages to other users, direct messages to queues, attach shortcuts to messages, print messages, and delete messages.

Accessing the Work Center

The Work Center is the hub of e-mail within OneWorld. Use the Work Center to manage your messages and queues. See *Working with Queues* for information about queues. You can access the Work Center in one of the following ways:

- From the Workflow Management menu (G02), choose Employee Work Center.

    The Work Center form appears.
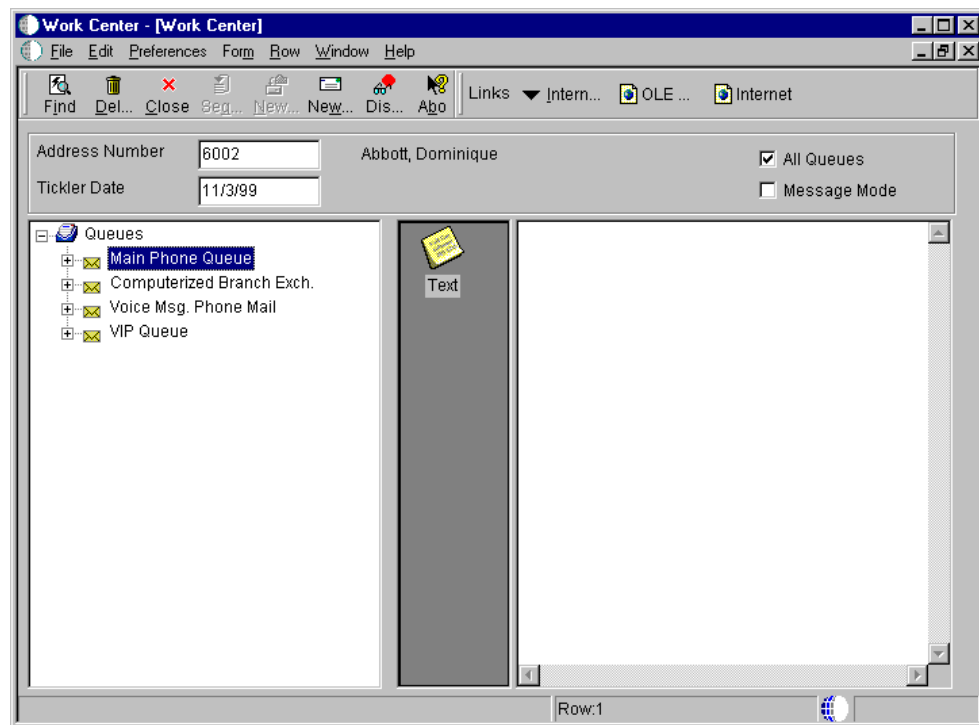
- From the Tools exit bar in any application, choose Work Center. You must have the Exit Bar preference turned on for this bar to appear.

- From the hyper-button in any application, click the down arrow on the hyper-button, choose Tools, and then Work Center.

Viewing Messages

Use the Work Center to view your messages. Messages sent from other users will appear in either your Personal In Basket queue, or if you set them up, your Priority Mail and Secondary queues. See *Redirecting Messages to the Priority or Secondary Queue*. Workflow messages, however, can be sent directly to a specific queue. See the *Enterprise Workflow Management* guide for information about workflow messages.

Note

If you cannot view messages, make sure that queue security is set up to allow you to view the Address Book number and queue that you want to view. See *Changing a User's Queue Security* for information about queue security.

► **To view messages**

1. From any application, click the down arrow on the hyper-button and choose Tools, and then Work Center.

2. On Work Center, double-click on one of your queues that contains a message.

   Any messages in that queue appear. New messages appear in bold.

3. Click on the message that you want to view.

   The message appears in the right-side view area of the Work Center form.

Sending Internal Messages

When you send internal e-mail messages, you send them to other users within OneWorld. You can control the time of delivery for a message by assigning a tickler date to it. A tickler date is a date in the future when OneWorld will automatically send the message. Assigning a tickler date is especially helpful if you plan to be out of the office on the day that you want others to receive your message, or if you want to remind yourself about upcoming meetings or other obligations.

When you send internal messages, you can also include an attachment. Attachments allow you to include files, images, or links that conform to the OLE standard, such as word-processing documents and spreadsheets.

To send a message to more than one person, you can use a quick list or a predefined distribution list.

► **To send an internal message**

1. From any application, click the down arrow on the hyper-button, choose Tools, then Send, and then Internal Mail.

2. On Send Internal Mail, to send a message to one person, complete the following fields:

- Send To

- Subject

3. The following fields are optional, so you can complete if necessary:

- Type 1

- Type 2

- Mail Box

- Marketing

- Lead Source

- Keep Copy

- Receipt Notify

- Address

- Contact

- Tickler Date

- Phone Number

4. Type your message.

5. To include an attachment with your message, right-click the panel with the Text icon.

6. Choose New, and then one of the following:

- Image

- OLE

- Shortcut

- URL/File

7. Click OK to send the message.

   OneWorld returns you to the previous application. If you choose to keep a copy of a message that you send, you can view it in the same queue from which you sent the message.

See Also

- *Working with Media Objects* for information about attaching media objects

- *Media Objects and Imaging* in the *System Administration* documentation for complete information about media objects

► **To send a message to a quick list**

1. From any application, click the down arrow on the hyper-button, choose Tools, then Send, and then Internal Mail.

2. On Send Internal Mail, choose Quick List from the Form menu.
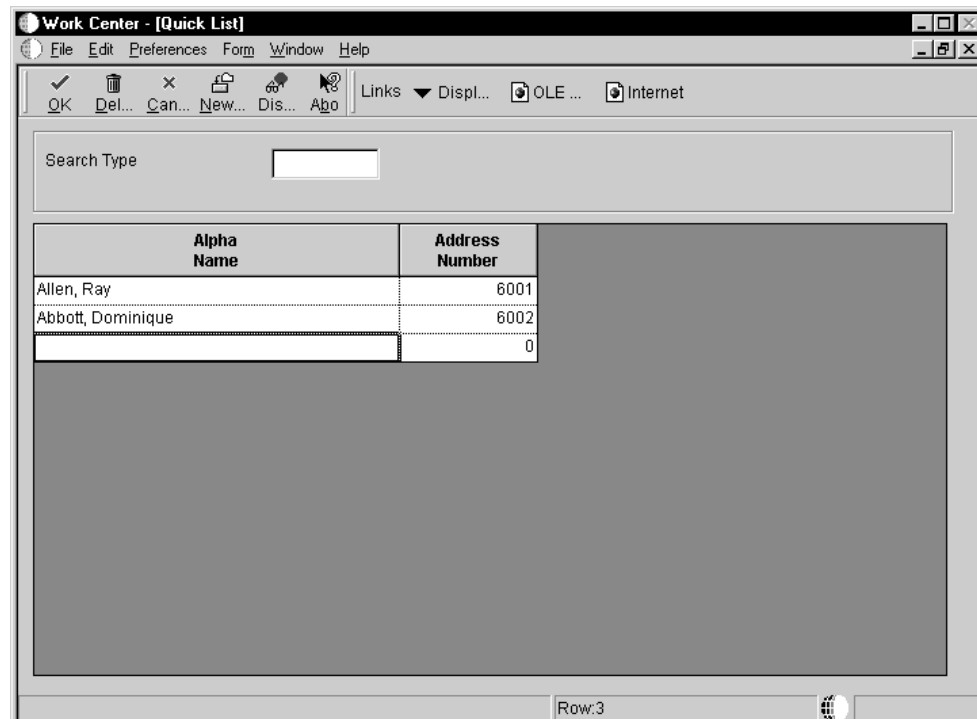
3. On Quick List, complete either of the following fields for each person whom you want on the list, then click OK:

    - Alpha Name

    - Address Number

4. Follow the steps for sending an internal message.

This process sends your message to the people whom you placed on the quick list. You cannot save a quick list.

▶ **To send a message to a distribution list**

1. From any application, click the down arrow on the hyper-button, choose Tools, then Send, and then Internal Mail.

2. On Send Internal Mail, enter one of the following in the Send To field:

    - Address Number of the distribution list to send the message to all members in one distribution list.

    - Parent Number of the distribution list to send the message to all members (children) of the parent distribution list. The parent distribution list might include more than one distribution list.

3. Follow the steps for sending an internal message.

See Also

❑ *Understanding Distribution Lists* in the *Enterprise Workflow Management* documentation for complete information about distribution lists

Setting Up External Mail Preferences

Before you can send or receive e-mail that is external to OneWorld, you must designate which third-party e-mail product to use. When you choose the External Mail option to send an external message, OneWorld checks your local address profile for your external mail information. If no preference exists at the local level, it then checks the Microsoft Exchange or Microsoft Outlook profile. Finally, it checks the jde.ini file. If no preference exists at any of these levels, the system then prompts you to set up an external mail preference.

If no external mail preference has been set up for an employee, you can set one up using the Update Mail Preference form.

▶ **To set up external mail preferences**

1. From Workflow Management (G02), choose Employee Queue Manager (P012501).

2. On Work With Employee Queue Manager, find and choose the address number for which you want to apply external mail preferences, and then choose Preference from the Row menu.

3. On Update Mail Preference, complete the following fields, then click OK:

- E-mail Preference

- E-mail Address

See Also

❑ *Setting Up a Third-Party Mail System* in the *Enterprise Workflow Management* documentation for more information about using third-party e-mail systems

Sending External Messages

You use external e-mail for messages sent to people outside of OneWorld, but you can also use it for people within OneWorld. Your mail preference must be set up appropriately to send external messages. See *Setting Up External Mail Preferences* in this section for information.

When you send external messages, you can include an attachment, such as an image or an OLE link, to a word-processing document or a spreadsheet.

► To send external messages

1. From any application, click the down arrow on the hyper-button and choose Tools, then Send, then External Mail.

2. If the Update Mail Preference form appears, you are not set up to send e-mail. Complete the following:

- Change the E-mail Preference field to an external mail value, such as 2 for Microsoft Exchange.

- Enter your e-mail address from the address profile set up in your third-party e-mail product.

- Click OK.
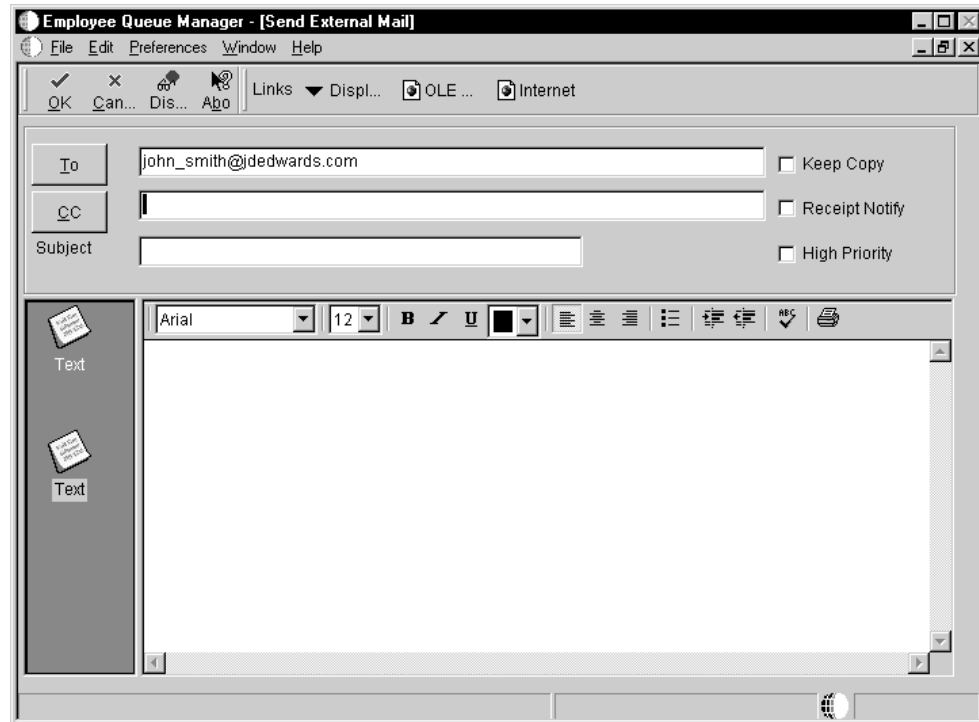
3. On Send External Mail, complete the following field:

- To

4. The following fields are optional, so you can complete them if necessary:

- CC

- Subject

5. Type your message and then click OK to send the message.

Working with Shortcuts

When you send a message to an internal recipient, you can attach a shortcut to a OneWorld application and preface it with a message for the recipient's review and approval. For example, you might want your manager to approve a change that you made to a customer's record. After sending a shortcut to your manager, he or she can view the record immediately by clicking the shortcut icon. When you send a shortcut, the system sends the key for that particular record to the recipient. When the recipient clicks the shortcut icon, OneWorld opens the application and retrieves the record.

When you answer a workflow action message, you can add your own comments. These comments are not sent back to the person who originally sent the message. Instead, they are stored as part of the audit trail data within OneWorld. This process only applies to workflow messages that have the generic workflow approval form attached to them. From this approval form, you can select Audit Trail from the Form menu and enter audit text.

You can attach shortcuts to messages created in Microsoft Exchange or Microsoft Outlook. You can also create a shortcut to an application on your desktop.

► **To send a shortcut**

1. From the application from which you want to create a shortcut, retrieve any records you want the recipient to view.

2. Click the down arrow on the hyper-button and choose Tools, then Send Shortcut.

   The Send Internal Mail form appears with a shortcut to the application.

3. On Send Internal Mail, complete the following fields:

   - Send To

   - Subject

   - Keep Copy

   - Receipt Notify

   - Address

   - Contact

   - Tickler Date

   - Phone Number

4. Type your message.

5. Click OK to send the message.

▶ **To create a shortcut on your desktop**

You can create a shortcut to a particular record within an application on your desktop.

From any application, click the down arrow on the Hyper-button and choose Tools and then Create Shortcut. The system places the shortcut icon on your Windows desktop. After you create the shortcut, you can drag the shortcut icon into an internal or external message. You can place shortcuts into messages created in any third-party e-mail system.

Revising Messages

You can revise the text of messages in any of your queues. This feature opens up the actual message and allows you to change the text or add new text.

▶ **To revise messages**

1. From any application, click the down arrow on the hyper-button, choose Tools, and then Work Center.

2. On Work Center, choose the message that you want to revise. Then from the Row menu, choose Message Revisions.

3. On the Message Revisions form, change any of the following fields and then click OK:

   • From

   • Contact

   • Phone Number

   • Subject

   • Tickler Date

   • Free-form text area

Moving a Message to Another Queue

You can move a message from one queue to another. For example, you might want to move a message from your Priority queue to your Personal To Do List queue.

▶ **To move a message to another queue**

1. From any application, click the down arrow on the hyper-button, choose Tools, and then Work Center.
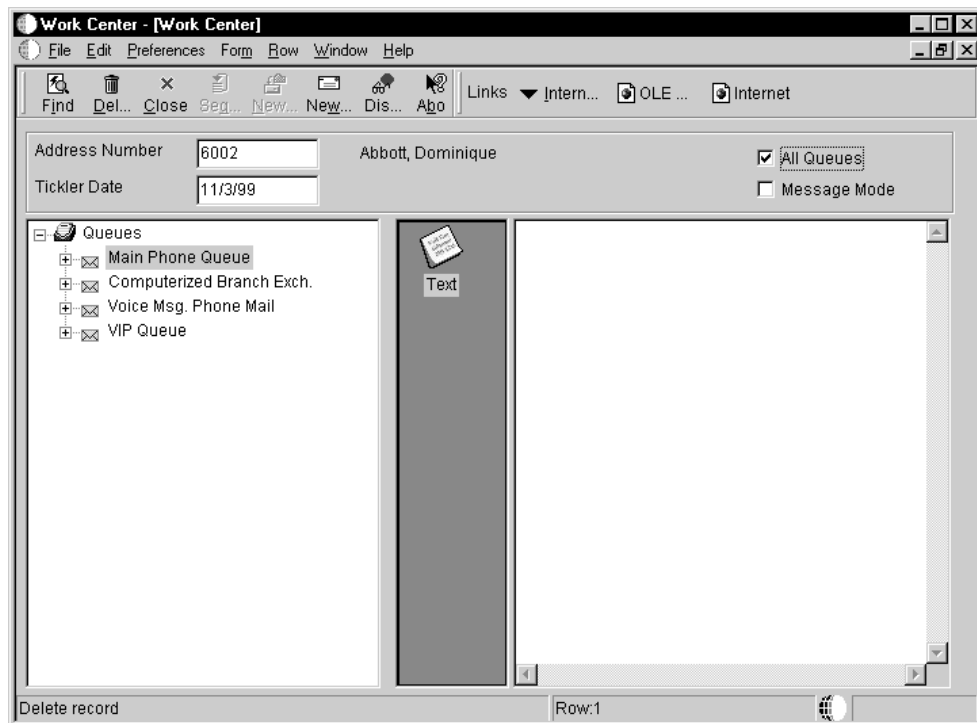
2. On Work Center, click the All Queues option if the target queue to which you want to move the message does not appear.

3. Click and drag the message to the target queue. To move more than one message, hold down the Shift key and click on each message, and then click and drag one of the messages to the target queue. All highlighted messages move to the queue.

4. To verify the placement of the message, double-click the target queue and view the contents.

Redirecting Messages to the Priority or Secondary Queue

You can redirect messages that you receive from an individual to your Priority Mail queue. When you do this, the system sends all future messages from that individual directly to your Priority Mail queue. Alternatively, you can redirect messages from an individual to your Secondary queue.

To redirect messages to the Priority Mail or Secondary queue, you must follow these steps and not the ones for moving messages. Moving messages only moves individual messages, whereas redirecting messages to the Priority Mail or Secondary queue affects all messages from that user until you remove the designation.

Although you can move a message to the Archived or Deleted queue, the system does not redirect future messages from the sender to that queue. You must manually move the sender's message to the Archived or Deleted queue each time.

You can redirect messages from more than one person to your Priority Mail and Secondary queues. You can also prevent messages from being delivered to a specific queue.

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► **To redirect messages to the Priority Mail or Secondary queue**

1. From any application, click the down arrow on the hyper-button, choose Tools, and then Work Center.

2. On Work Center, choose the message that you want to redirect to your Priority Mail or Secondary queue.

3. From the Row menu, choose one of the following:

   - Priority

   - Secondary

4. Double-click the target queue to verify the placement of your message.

   Any further messages that you receive from this sender will arrive in the queue which you selected. Repeat these steps for redirecting other users' messages.

► **To cancel the delivery of messages to a specific queue**

If you decide that you no longer want the system to automatically redirect messages from an individual to a Priority Mail queue, you can cancel the automatic delivery of messages to your Priority Mail or Secondary queue.

1. From any application, click the down arrow on the hyper-button, choose Tools, and then Work Center.

2. On Work Center, choose a message from the user for which you want to cancel automatic delivery.

3. From the Row menu, choose Remove.

4. Move any other messages from this particular sender out of the Priority Mail or Secondary queue. As long as you keep any messages in your Priority Mail or Secondary queue from the sender whom you removed, future messages from that sender will still appear in that queue.

Reassigning Messages

OneWorld allows you to reassign a message to another user, after the message is sent to the original recipient. This process changes whose queue the message appears in. For example, if you originally sent a message to Jim, you can reassign that message to Betty. The message will now be in Betty's queue and will not be in Jim's queue. You can also reassign messages that you receive.

You can only reassign messages in other users' queues if your queue security allows.

► **To reassign messages**

1. From any application, click the down arrow on the hyper-button, choose Tools, and then Work Center.

2. On Work Center, choose the message that you want to reassign, and then from the Row menu, choose Reassign.

3. On Assign Message, complete the following fields, then click OK:

   - Address Number

   - Queue Designator

Deleting Messages

To delete a message, either drag the message to the Deleted queue, or choose the message and click Delete. To choose more than one message, hold down the Shift key and click on each message.

You cannot recover a message after you move it to the Deleted queue. It remains in your Deleted queue until your system administrator purges messages, which is typically done on a periodic or predetermined schedule. Alternatively, you can remove a message from the system by deleting it from your Deleted queue.

Printing Messages

An alternative to viewing messages online is to print them. You can do either of the following:

- Print a message
- Print a report that lists all messages within a queue

► To print a message

You might find that you want a printed copy of a message for your records. You can print a message from any of your queues.

1. From any application, click the down arrow on the hyper-button, choose Tools, and then Work Center.
2. On Work Center, choose the message that you want to print.
3. From the Row menu, choose Print.
4. On Printer Selection, click OK.

► To print a report that lists all messages in a queue

You can print a report that lists all of the messages in a queue. This report includes a summary for each message. The two types of message reports are:

- Message Center - Summary
- Message Center - Detail

These reports show who sent and received the message, and the subject of the message. The detail report shows the content of each message.

1. From any application, click the down arrow on the hyper-button, choose Tools, and then Work Center.
2. On Work Center, choose the message queue that you want to print.
3. From the Form menu, choose Print.
4. On Work with Batch Versions - Available Versions, select the version and submit the report.

Working with Queues

Use the Work Center to organize your messages by using queues. This topic describes how to manage your queues by creating new ones or adding security. As with a message, you can also add a shortcut to a queue.

Setting Up Queues

Queues are a way to group related messages together. You set up queues in OneWorld as user defined codes. Use this task to create queues or to modify existing queues.

► **To set up a queue**

1. From Workflow User Defined Codes (G02411), choose Employee Task Queues.

2. On Work With User Defined Codes, click Add.

3. On User Defined Codes, complete the following fields in an empty row on the grid and click OK:

- Codes

  Enter a unique number for the queue.

- Description 1

- Description 2

  Specify "HOT" for Description 02 if you intend to attach a shortcut to this queue. This field is optional unless you attach a shortcut.

- Special Handling

- Hard Coded

  Enter N in this field.

Adding a Shortcut to a Queue

You can add a shortcut to a queue to provide a link to a OneWorld application. You might do this if all messages in the queue pertain to a particular OneWorld application.

► **To add a shortcut to a queue**

1. Ensure that the Description 2 field of the queue has the literal value HOT (in capital letters). See *Setting Up a Queue* for information.

2. To add the shortcut, from Workflow Management Setup (G0241), choose Queue Properties.

3. On Work With Queues, click Add.

4. On Queues Property Revisions, complete the following fields and click OK:

   - Queues

     Enter the code number of the queue to which you want to attach a shortcut.

   - Application

     Enter the program number of the application to which you want to create a shortcut.

   - Form Name

   - Version

Specifying the Queues that a User Can View

When you set up a new user in a distribution list, you must specify which queues the user can view within that group.

► **To specify the queues a user can view**

1. From Workflow Management Setup (G0241), choose Queue Security.

2. On Work With Workflow Message Security, click Add.

3. On Workflow Message Security Revisions, complete the following fields:

   - User

   - Group

4. Specify the queues that a user can view by completing the following field and clicking OK:

   - Authority Y/N

   In this example, Dominique Abbott has access to the Electronic Workbench, Collection Management, Credit Management, Delinquency Notice Approval, and Delinquency Fee Approval queues. Therefore, she can monitor all messages within these queues.

Changing a User's Queue Security

You can deny a user access to queues or allow the user to view all of the messages within certain queues available to the group.

If you choose the Public Security option, all users will have access to queues that you specify. For example, if you choose the Public Security option and give authority to the

Collection Management queue, all users in the system will be able to view all messages in that queue.

▶ **To change a user's queue security**

1. From Workflow Management Setup (G0241), choose Queue Security.

2. On Work With Workflow Message Security, find and choose the user's record, and click Add.

3. On Workflow Message Security Revisions, complete the following fields and click OK:

   - Public Security

     When you choose this option, the system protects the User and Group fields because you are specifying that you want to give authority for specific queues to all users in the system.

   - Authority Y/N

   If you complete the user field, the system protects the Public Security field.

Logging Time and Adding Remarks

The Work Center allows you to inform others of your whereabouts. You can specify when you are in or out of the office by using the Check In and Check Out options. You can add remarks to your check out to provide detailed information about where you are. You can view this information from the Time Log form.

Checking In and Out

Checking in and out informs others of your whereabouts. When you check out, you can also enter a remark, return date, and return time. If you do not enter a remark, the system supplies the word *home*. If you do not enter a return date, the system enters the next business day. The check in and out information appearing on the Time Log form is discussed later in this topic.

▶ **To check in and out**

From the Workflow Management menu (G02), choose Employee Queue Manager.

1. On Work With Employee Queue Manager, locate and choose your record.

2. From the Row menu, choose one of the following:

- Check In

- Check Out

Each time that you choose Check In or Check Out, OneWorld updates your status, which you can view from the Time Log.

Entering Remarks

You can enter a remark to provide more information about your whereabouts, your schedule, and so on. For example, you might enter a remark indicating that you are in a meeting, on vacation, or can be reached at a particular phone number. Later, you might need to update

your existing remark, for example, if you are no longer in a meeting or are leaving on a business trip.

► To enter remarks

1. From the Workflow Management menu (G02), choose Employee Queue Manager.
2. On Work With Employee Queue Manager, locate and choose your record.
3. From the Row menu, choose Remark.

4. On the Check In/Out and Update Remark form, turn on the Update Remark option.
5. Enter your remark in the following field:

   - Remark

6. The following fields are optional; complete if necessary:
   - Return Time
   - Return Date
7. Click OK.

To view your remark, click Find on Work With Employee Queue Manager.

Viewing Time Logs

You can view the times when you or other employees check in and out, and view any remarks.

► **To view time logs**

1. From the Workflow Management menu (G02), choose Employee Queue Manager.

2. On Work with Employee Queue Manager, choose the employee record time log that you want to view.

3. From the Row menu, choose Time Log.

Media Object Attachments

J.D. Edwards software Media Objects and Imaging features allow you to attach useful information to an application, including information that might currently exist as a paper-based document. The Media Objects feature allows you to attach the information to J.D. Edwards software applications, forms and rows, and Object Librarian Objects. The Imaging feature, within Media Objects, gives you flexibility to create a more efficient method of information storage.

Use Media Objects to link information to applications, either to individual rows in a grid or to a form. The following list describes the types of information that you can attach to a grid row or form:

Text	Media Objects provides a word processor that lets you create a text-only attachment. For example, you could use a text attachment to provide specific instructions for a form or additional information about a record.
Image	Images include files such as Windows bitmaps, Graphics Interchange Format (GIF) files, and Joint Photographic Experts Group (JPG) files. These files might represent electronically created files as well as scanned images of paper-based documents.
Object Linking and Embedding (OLE)	Media Objects can be files that conform to the OLE standard. OLE allows you to create links between different programs. Using these links, you can create and edit an object from one program in a different program. J.D. Edwards software provides the links that you need to attach OLE objects.
	You attach OLE media objects at the base form level. Media objects attached at this level are attached to a form and not to any data that might appear in the form. You can attach media objects to a grid row or a form, but the files themselves exist in separate directories. The only file information included with the application to which the OLE links is the path to the supporting file.
	You can only use OLE objects that you properly register and install as OLE objects through Windows.
JDE Shortcuts	A JDE shortcut is a link that opens a J.D. Edwards software application. Within media objects, you can only attach J.D. Edwards software shortcuts, that is, you cannot attach Windows shortcuts to media objects.
Uniform Resource Locators (URL)/Files	Media Objects can be links to web page URLs or other related files. When a developer attaches a URL media object to a control object on a form, the web page appears as part of the form. When a user attaches a URL to a form or Object Librarian object, the media object acts as a link to the URL.

System administrators can also set up templates. A template might include attachments of its own, such as images and shortcuts. For example, you can create a letterhead and a standard form for a memo. Also, you might create a shortcut to include in the template to provide access to an application that uses data specific to the information that you add to the template. See the *Development Tools* documentation for information on creating attachment templates.

For system administration information, see *Media Objects and Imaging* in the *System Administration* documentation.

Working with Media Objects

You can use the Media Objects feature to add text, graphics, and other objects to forms and records. For example, you can use a text attachment to explain special circumstances surrounding a journal entry. Or you can attach drawings, animations, and other types of objects to forms and records. A pop-up menu provides access to established templates for attachments and an option to set the properties for the Media Objects form.

When you attach a media object to a form, the attachment might not be available if you access different data on the form. For example, if you attach a media object to a detail form that contains data for Order Number 2002, this attachment does not appear on the detail form that appears when you access data for Order Number 3003. The base form, which in this case is a detail form, is the same for both Order Numbers, but the data associated with the form is specific to each Order Number. The Order Number represents the key to the location where an attachment is stored.

OneWorld supports Object Linking and Embedding (OLE). OLE allows you to create links between different programs. Using these links, you can save an object from one program in a different program. OneWorld provides the links that you need to attach OLE objects. You can attach OLE objects as media objects and at the base form level. When you attach an object at the base level of the form, you attach the object to the form and not to any data that might appear in the form.

If attachments exist for a form, a paper clip icon appears at the right of the status bar when you open the form. For an OLE object attached at the base form level, a document icon appears at the right of the status bar.

When a form first opens, grid rows do not indicate whether attachments exist for the corresponding records. You can perform a search on every record that OneWorld loads onto your workstation or search on each record individually to determine whether attachments exist for records.

The Text feature includes a word processor that lets you create, view, edit, and delete notes.

When you create a text attachment, you can also set up templates. You can use templates to create a format for a frequently used media object.

Checking for Attachments

To find out whether an attachment exists for a record, you must first perform a search on the record. You can perform this search on one record or on a number of records at the same time. OneWorld only searches for attachments on records that you load onto your workstation. For example, when you initially click the Find button to locate a number of records, only the records that appear in the grid exist on your workstation. Use the page buttons to view more records.

When you click the Find button to refresh the records in the grid or to display new records, the form resets the attachments view status. You must again click the find attachments button to display the attachments for the grid records.

▶ To check for all attachments

On a form with the attachments feature available, click the Checking for Attachments icon on the left of the row of column titles. This icon looks like a paper clip overlapping a magnifying glass.

A paper clip icon appears in the row header for each loaded record with an attachment.

▶ To check for attachments for a single row or a range of rows

1. On a form with the attachments feature available, move and hold the cursor over the row header for the grid row.

   If an attachment exists for the row, a paper clip icon appears in the row header.

2. Move the cursor up or down in the row header column to search for attachments for adjacent rows.

Attaching Media Objects

Use the Attachments feature to attach text, photos, drawings, spreadsheets, video images, sounds, and application shortcuts to forms and grid rows. For example, you might attach the image of an invoice to a data entry record, attach a legal document to a record that describes a contractual agreement, or attach text that describes a process on a form. The attachments feature is not available on all forms.

Note

You cannot create attachments until an administrator has established and mapped media object queues as described in *Media Objects and Imaging* in the *System Administration* documentation.

When you enter text, you can format the paragraphs and run a spell check. J.D. Edwards software also supports object linking and embedding (OLE).

▶ To attach text

1. On a form where attachments are available, do one of the following:

   - To attach text to a form, from the Form menu, choose Attachments.

     If attachments exist for the form, click the paper clip icon to the right of the status bar.

   - To attach text to a grid row, choose the row, and then from the Row menu, choose Attachments.
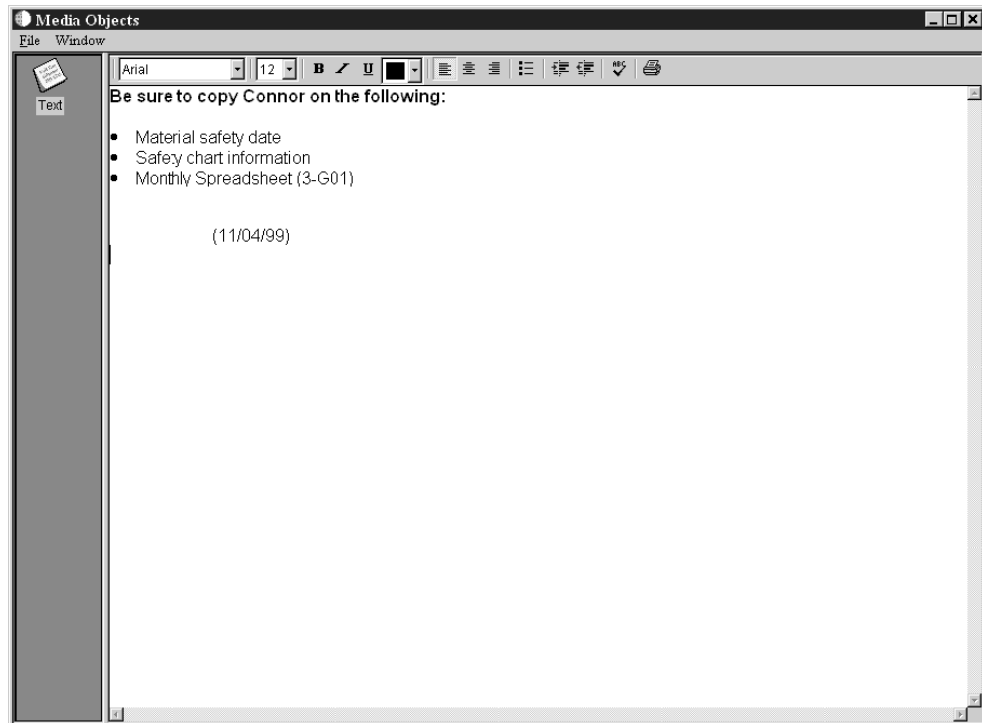
The Media Objects workspace is split into two panels. The left panel is the icon panel and the right panel is the viewer panel. Icons for any files previously attached to the record appear in the icon panel.

2. Do one of the following:

    - From the File menu, choose New, and then Text.

   - In the icon panel, click the right mouse button, choose New, and then Text from the pop-up menu.

3. In the viewer panel, type the desired text.

4. When you finish, from the File menu, choose Save and Exit.

    You can use the formatting tools at the top of the viewer panel to format the text of your note.

► **To attach an image**

1. On a form where attachments are available, do one of the following:

    - To attach an image to a form, from the Form menu, choose Attachments.

      If attachments exist for the form, click the paper clip icon to the right of the status bar.

    - To attach an image to a grid row, choose the row, and then from the Row menu, choose Attachments.

2. On Media Objects, do one of the following:

    - From the File menu, choose New and then Image.

- In the icon panel, click the right mouse button, choose New, and then Image from the pop-up menu.

3. Complete the following options:

- Queue Name

- Files of Type

The Preview option contains a default checkmark to display a sample of the selected image. Toggle this option to display or hide the preview image.

4. Choose an image, and then click OK.

If OneWorld supports the graphic format, the image appears in the viewer panel.
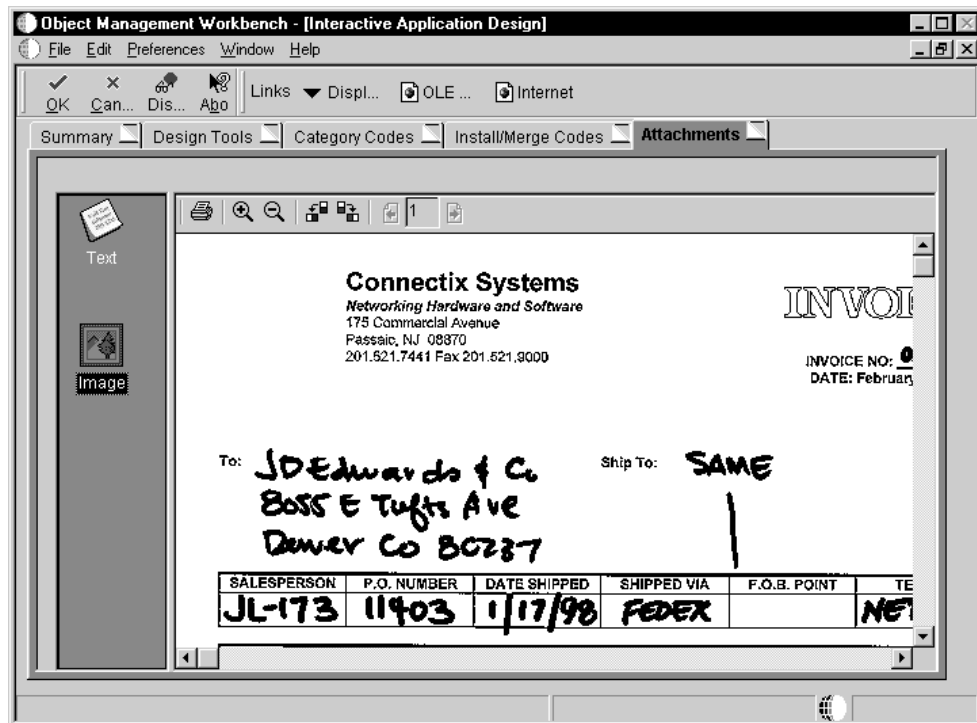
5. When you finish, from the File menu, choose Save and Exit.

Field	Explanation
Queue Name	The name of the directory where the image file exists.
Files of Type	The list of file extensions that the system supports. For example, file types might include .bmp for a Windows bitmap, .gif for a graphics interchange format file, and .jpg for a joint photographic experts group file.

► To attach an OLE object

1. On a form where attachments are available, do one of the following:

   - To attach an OLE object to a form, from the Form menu, choose Attachments.

     If attachments exist for the form, click the paper clip icon to the right of the status bar.

   - To attach an OLE object to a grid row, choose the row, and then from the Row menu, choose Attachments.

2. On Media Objects, do one of the following:

   - From the File menu, choose New and then OLE.

   - In the icon panel, click the right mouse button, choose New, and then OLE from the pop-up menu.
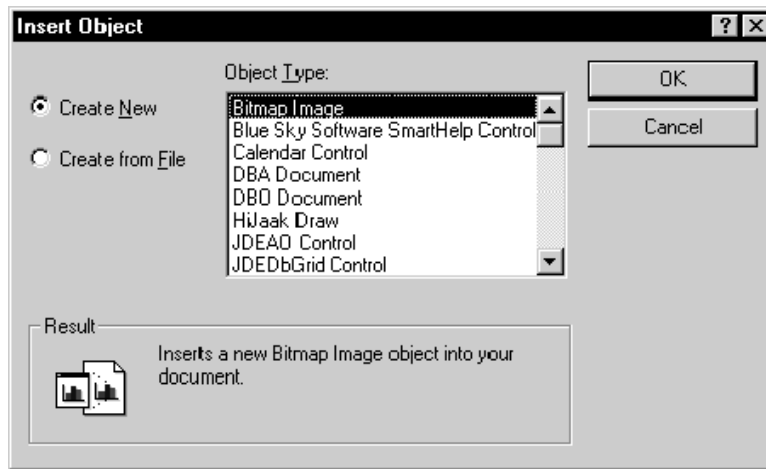
3. On Insert Object, to create a new object, choose an object type and then click OK.

   Selections vary from system to system depending on what the system administrator installs on your workstation and on the network.

4. Create your object.
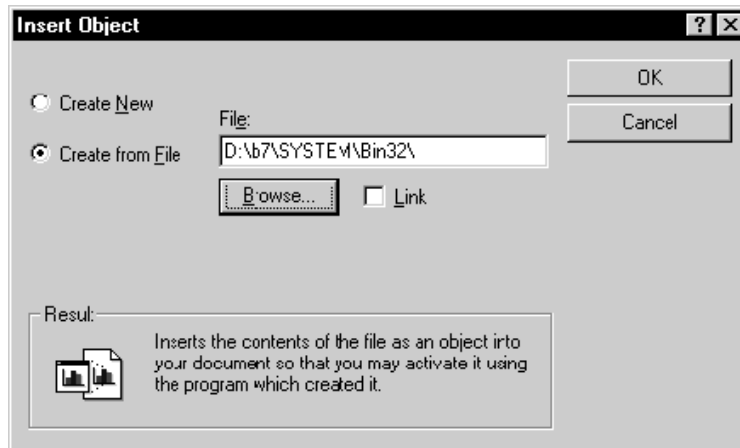
5. To attach an existing object, choose Create from File, locate the object on your system, and then click OK.

    Depending on whether you create an object or attach a preexisting object, the application associated with the object appears in the viewer panel to display either a blank workspace or the preexisting object.

    The menu bar displays the menus for the application from which you call the object. For example, if you select an Excel document, the menus for Excel display on the menu bar.
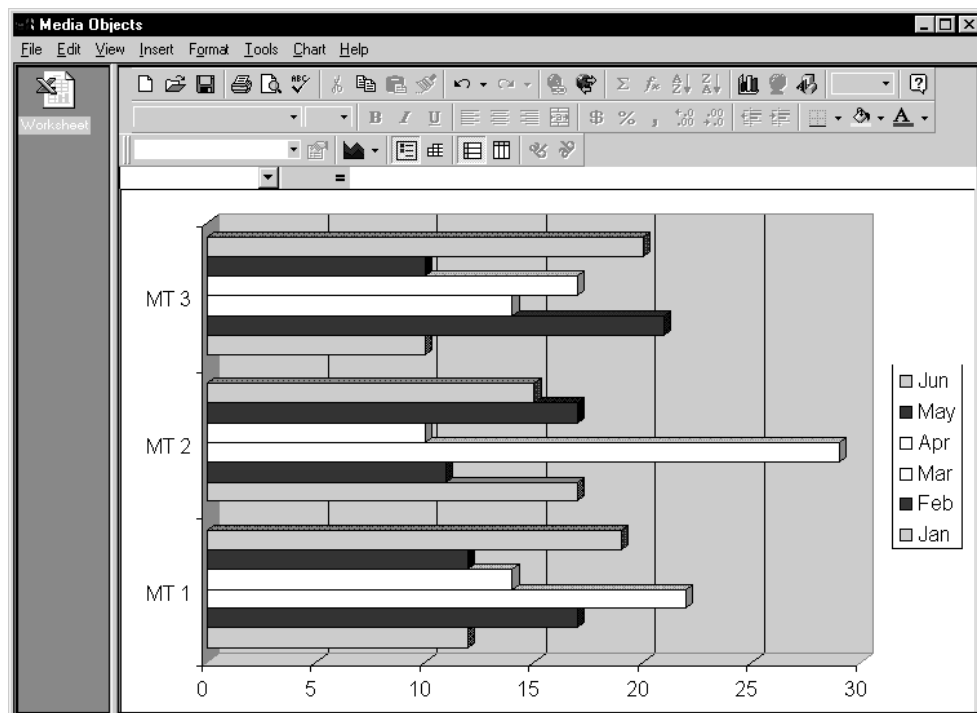
6. On Media Objects, edit the object in the viewer panel to your preference.

7. When you finish, from the File menu, choose Save and Exit.

► **To attach a shortcut**

Include a shortcut to provide access directly from a record to an associated application.

1. On a form where attachments are available, do one of the following:

   - To attach a shortcut to a form, from the Form menu, choose Attachments.

     If attachments exist for the form, click the paper clip icon to the right of the status bar.

   - To attach a shortcut to a grid row, choose the row, and then from the Row menu, choose Attachments.

2. On Media Objects, do one of the following:

   - From the File menu, choose New and then Shortcut.

   - In the icon panel, click the right mouse button, choose New and then Shortcut from the pop-up menu.

3. On Open, browse through your files, choose the appropriate shortcut, and click Open.

   Your shortcut appears in the viewer panel.
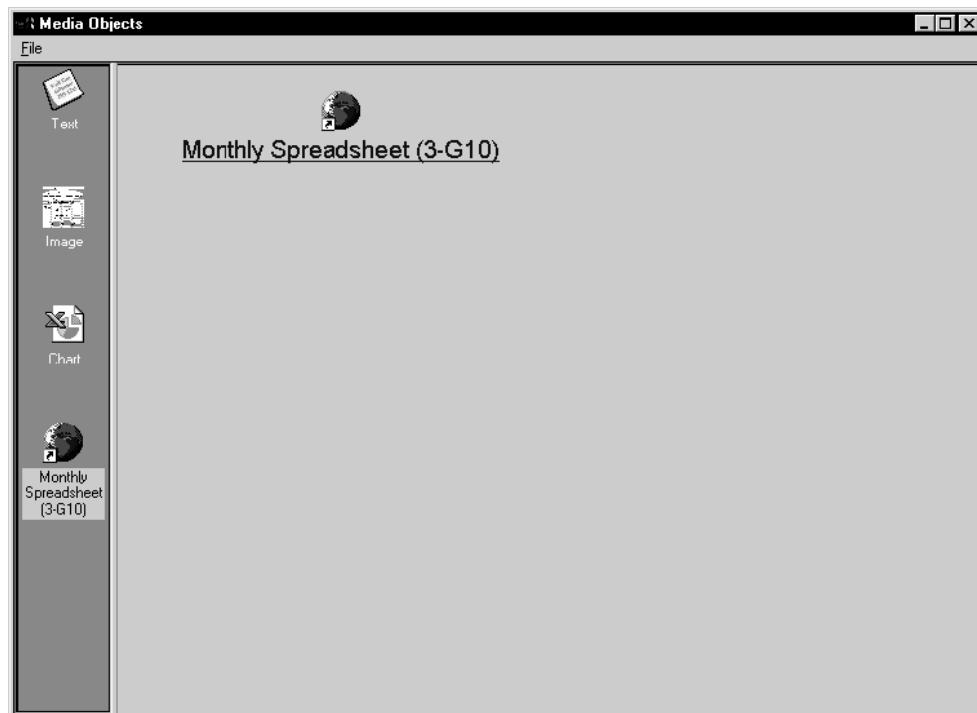
4. When you finish, from the File menu, choose Save & Exit.

► To attach a URL or file

Attach a URL to provide access to a web page or a file on disk. You can also attach other types of files that cannot be attached as images or OLE files such as bitmaps.

1. On a form where attachments are available, do one of the following:

    -   To attach a URL or file to a form, from the Form menu, choose Attachments.

        If attachments exist for the form, click the paper clip icon to the right of the status bar.

    -   To attach a URL or file to a grid row, choose the row, and then from the Row menu, choose Attachments.

2. On Media Objects, do one of the following:

    -   From the File menu, choose New and then URL/File.

    -   In the icon panel, click the right mouse button, choose New and then URL/File from the pop-up menu.

3. On Add URL/File, browse through your files or queues, choose the appropriate URL or file, and click Open. You can also type in a URL in the field provided.

4. Click OK.

    Your URL or file appears in the viewer panel. If you are attaching a URL, a download dialog box appears. You can either verify that the URL is active, or you can click Cancel.

5. When you finish, from the File menu, choose Save & Exit.

► To search for a media object

You can search for a specific media object in the system by information such as creation date, alternate keys, or user-defined codes. Note that you can only search for media objects that already have codes defined for them and that your system administrator has made available to all users in the system.

1. On a form where attachments are available, do one of the following:

    -   To search for a media object to attach to a form, from the Form menu, choose Attachments.

        If attachments exist for the form, click the paper clip icon to the right of the status bar.

    -   To search for a media object to attach to a grid row, choose the row, and then from the Row menu, choose Attachments.

2. On Media Objects, do one of the following:

    -   From the File menu, choose New and then Search.

    -   In the icon panel, click the right mouse button, choose New, and then Search from the pop-up menu.
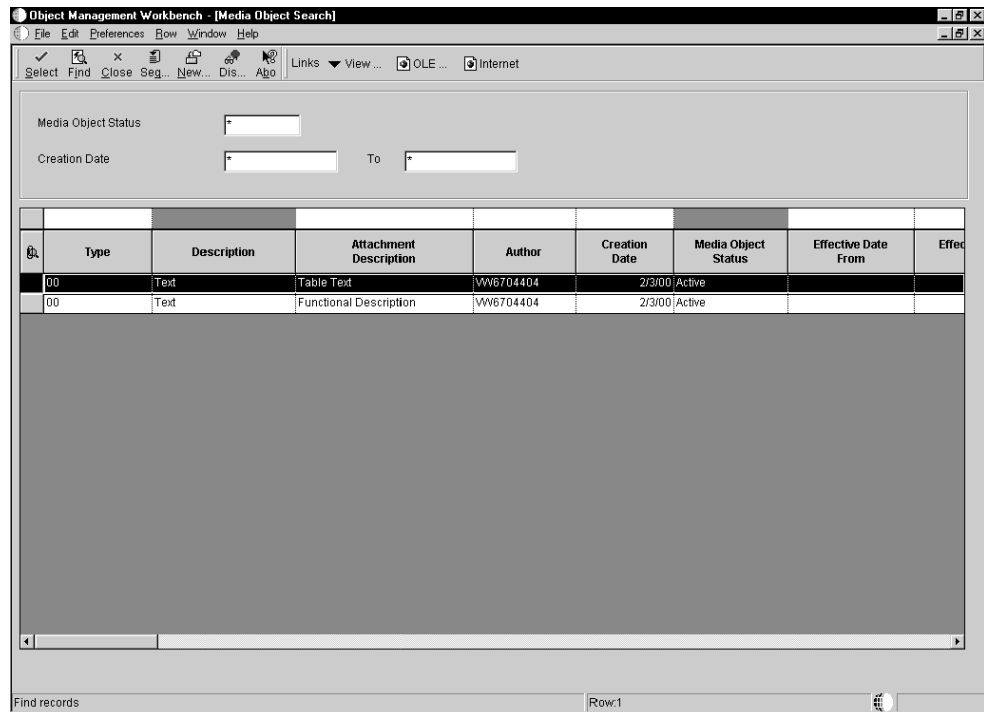
3. On Media Object Search, complete the following fields and click Find.

- Media Object Status

- Creation Date

Use the QBE row to limit your search, if desired.

Only attachments with defined metadata appear.

4. Choose an attachment and click select.

Your media object appears in the viewer panel.

5. When you finish, from the File menu, choose Save & Exit.

► **To rename an attachment icon**

When you add an attachment, the system displays its filename under its icon in the icon panel. You can rename the icon to make it more meaningful to other users if you wish.

1. On Media Objects, choose an icon and do one of the following:

- From the File menu, choose Rename.

- In the icon panel, click the right mouse button and choose Rename from the popup menu.

2. Type a new name for the icon and then click anywhere else on the form when finished.

Deleting Media Objects

When you no longer need an attachment, use the Delete feature on Media Objects to remove the object. When you delete text, the text is permanently erased. When you delete images and OLE objects, you remove the attachment of the file to the record. The system still stores a file for the object.

► To delete an object

1. On a form where attachments are available, do one of the following:

    - To delete an attachment to a form, from the Form menu, choose Attachments.

        If attachments exist for the form, click the paper clip icon to the right of the status bar.

    - To delete an attachment to a grid row, choose a row with a paper clip icon, and then from the Row menu, choose Attachments.

2. On Media Objects, choose the appropriate icon in the icon panel and then choose Delete from the File menu.

3. On Confirm Media Object Delete, click Yes to confirm the deletion.

    The icon disappears from the icon panel.

4. When you finish, from the File menu, choose Save & Exit.

Working with Templates

On Media Objects, you can access the Work With Media Objects Templates form. On this form, you can attach create, modify, and delete templates to help you format your text attachments.

► To attach a template

1. On a form where attachments are available, choose the row to which you want to attach a template, and then choose Attachments from the Row menu.

2. On Media Objects, in the icon panel, click the right mouse button and choose Templates from the pop-up menu.
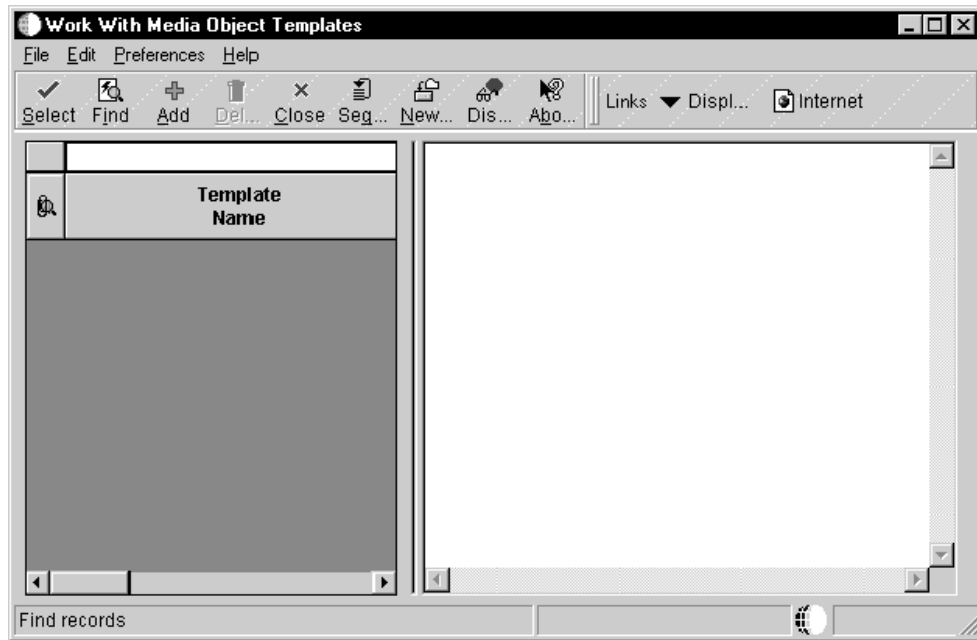
3. On Work With Media Object Templates, click Find.

   You can use the query-by-example line to refine your search.

4. To preview the template, double-click the paper clip icon in the row header.

5. Choose the grid row for the template that you want to attach, and then click Select.

6. The template appears in the workspace on Media Objects.

► **To create a template**

1. On a form where attachments are available, choose the row from which you want to attach a template, and then choose Attachments from the Row menu.

2. On Media Objects, in the icon panel, click the right mouse button and choose Templates from the pop-up menu.

3. On Media Objects Template, click Add.
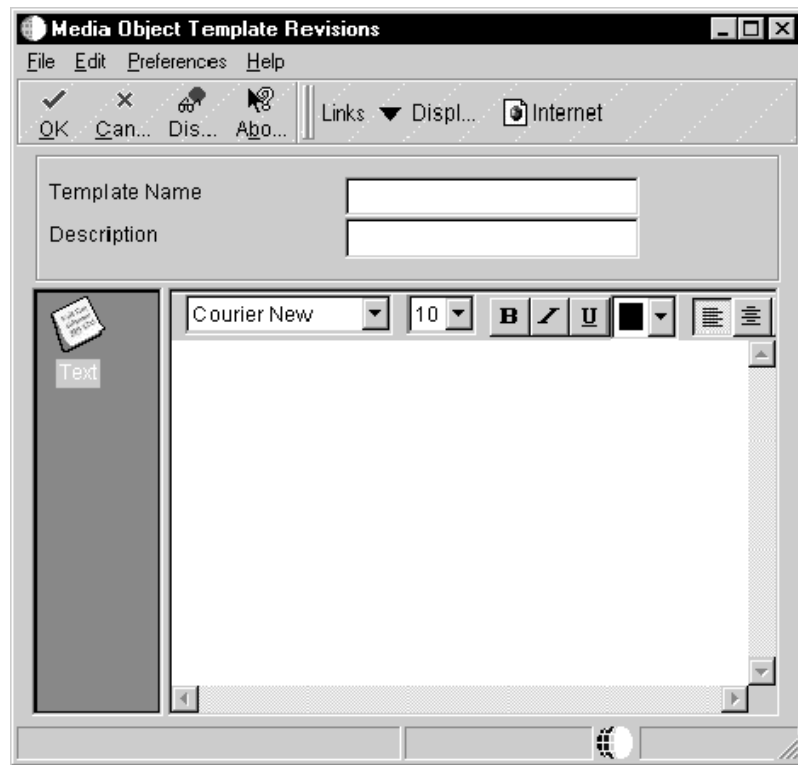
4. On Media Object Template Revisions, complete the following fields, and then enter your template information into the workspace:

5. Click Add.

    - Template Name

    - Description

► **To modify a template**

1. On a form where attachments are available, choose the row from which you want to modify a template, and then choose Attachments from the Row menu.

2. On Media Objects, in the icon panel, click the right mouse button and then choose Templates from the pop-up menu.

3. On Work With Media Object Templates, click Find.

    You can use the Query by Example line to refine your search.

4. Choose the grid row for the template that you want to modify and then click Select.

5. On Media Objects, modify the template as necessary and then from the File menu, choose Save & Exit.

► **To delete a template**

1. On a form where attachments are available, choose the row from which you want to delete a template, and then choose Attachments from the Row menu.

2. On Media Objects, in the icon panel, click the right mouse button and then choose Templates from the pop-up menu.

3. On Work With Media Object Templates, click Find.

   You can use the Query By Example line to refine your search.

4. Choose the grid row for the template that you want to delete, click Delete, and then on Confirm Delete, click OK.

► **To delete a template on Media Objects**

1. On a form where attachments are available, choose the row from which you want to delete a template, and then choose Attachments from the Row menu.

2. On Media Objects, in the icon panel, choose the text icon for the template, and then choose Delete from the File menu.

3. On Confirm Media Object Delete, click Yes.

   The template and the text icon disappear.

Working with the Properties of Media Objects

The pop-up menu that appears when you click the right mouse button in the icon panel on Media Objects provides you with the option to view and, for some objects, to change the properties of an object. Each object has unique properties.

In addition, you can define metadata for an object. Metadata contains information about the object such as a description of the object, who created it, and when it was created. Other users can then search for the object based on this information.

► **To set Media Objects properties**

1. On Media Objects, in the icon panel, click the right mouse button and then choose Properties.

2. On Properties, review the following on the Key Information tab:

   - Technical information about the key for the form

3. Click the Flags tab to review the following information:

   - Allow Text Items

   - Allow Image Item

   - Allow OLE Items

   - Allow RTF Text

   - Show Text Item On Open

   - Read Only

► **To set text properties**

1. On Media Objects, in the icon panel, click the right mouse button over a text icon, and then choose Properties from the pop-up menu.

2. On the text properties form, review the following fields on User Audit Information:

   - Created by

- Date Created
- Time Created
- Updated By
- Date Updated
- Time Updated

3. Click the Printing Information tab and then do the following, if necessary:

- Click the Check to print before report item option
- Complete the Effective From field
- Complete the Effective To field

► **To set image properties**

1. On Media Objects, in the icon panel, click the right mouse button over an image icon, and then choose Properties from the pop-up menu.

2. On the Image Properties tab, review the following fields:

- File Name
- Queue Name
- Queue Path

3. To give the image a title, complete the following field:

- Description

► **To view OLE properties**

1. On Media Objects, in the icon panel, click the right mouse button over an OLE object icon, and then choose Properties from the pop-up menu.

2. On the OLE Properties tab, review the following fields:

- File Name
- Queue Name
- Queue Path

► **To set shortcut properties**

1. On Media Objects, in the icon panel, click the right mouse button over a shortcut icon, and then choose Properties from the pop-up menu.

2. On the shortcut properties form, review the following fields on the General tab:

- Menu Name
- Selection
- Icon File
- Icon Index

3. Do the following if necessary:

- Click the Colors tab to set the color for the shortcut hypertext.

- Click the Fonts tab to set font properties such as size, family, bold, italics, underline, and strikeout.

► **To view and define metadata**

1. On Media Objects, in the icon panel, click the right mouse button over an object icon, and then choose Characterize Object from the pop-up menu.

   The Media Object Category Revisions form appears.

2. On the Media Object Category Revisions form, click the General tab, complete the following fields, and click OK:

   - Description

   - Author

   - Creation Date

   - Status

Attaching OLE Objects at the Base Form Level

At the base level of a standard form, you can attach OLE objects using the OLE Objects button on the Links toolbar. Menu bars and toolbars appear on all standard forms. When you attach an OLE object at the base level of a form, rather than associating the attachment with a record, the OLE object attaches only to the form. No matter what record appears on the form, the OLE object that you attach using the OLE Objects button will always appear when you open the form.

1. On any standard form, do one of the following:

   - From the Links toolbar, choose Preferences, and then OLE Objects.

   - From the Preferences menu, choose OLE Objects.

   - If attachments exist for the form, click the document icon to the right of the status bar.

2. Choose the appropriate queue from the Choose Queue form.

   Note

   If you do not know the queue in which the object you want to attach exists, see your system administrator.

3. On the OLE Objects form, do one of the following:

   - From the File menu, choose Add Object.

   - In the icon panel, click the right mouse button and then choose Add Object.
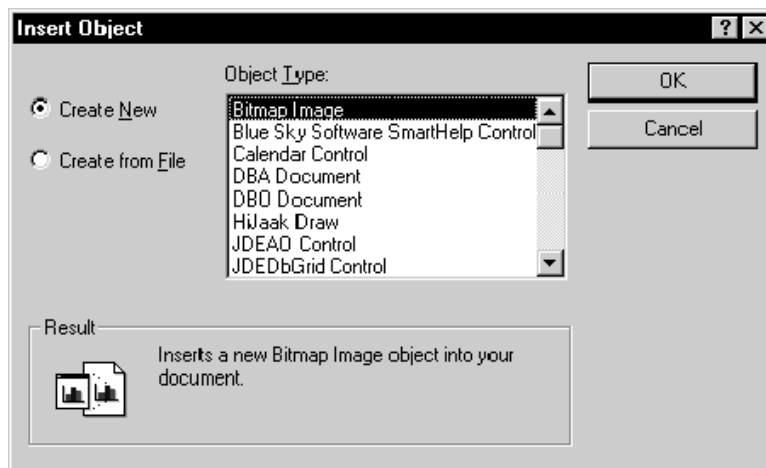
4. On Insert Object, to create a new object, choose the type of object that you want to create and then click OK.

   Selections vary from system to system depending on what the system administrator installs on your workstation and on the network.

5. Create your object.

6. To attach an existing object, choose Create from File, locate the object on your system, and then click OK.

   Depending on whether you create an object or attach a preexisting object, the application associated with the object appears in the viewer panel to display either a blank workspace or the preexisting object.

   The menu bar displays the menus for the application from which you call the object. For example, if you select an Excel document, the menus for Excel display on the menu bar.

7. Edit the object in the viewer panel to your preference.

8. Click the X button for the OLE Objects form in the application workspace to return to the main form.

► **To delete OLE objects at the base form level**

1. On any standard form, do one of the following:

    - From the Links toolbar, choose Preferences, and then OLE Objects.

    - From the Preferences menu, choose OLE Objects.

    - Click the document icon to the right of the status bar.

2. On the OLE Objects form, choose the object and do one of the following:

    - From the File menu, choose Delete Object.

    - In the icon panel, click the right mouse button and choose Delete Object.

3. On Confirm Media Object Delete, click Yes.

4. Click the X button for the OLE Objects form in the application workspace to return to the main form.

MailMerge Workbench

MailMerge Workbench merges Microsoft Word 6.0 (or higher) word-processing documents with OneWorld records to automatically print business documents such as form letters about employment verification. Certain application suites, such as Human Resource Management, use these documents within their normal workflow process. See your application guides to determine which applications use MailMerge documents. In these applications, OneWorld automatically prints the MailMerge documents as part of the workflow process, and no user intervention is needed.

You can use the Maintain MailMerge Documents application to add or change text in the business documents included with OneWorld, to create entirely new documents, and to delete documents.

Changing MailMerge Documents

Use Maintain MailMerge Documents (P980014) to change the properties of a MailMerge document and the Microsoft Word file associated with the MailMerge document. On the properties form, you can change the document's description and its queue (where the document is stored) name. You cannot change the document's name nor its data structure. You can, however, create a new MailMerge document with a different name and data structure as explained in *Adding MailMerge Documents*. You can add, change, or delete any text or MailMerge fields in the Microsoft Word file.

▶ **To change the properties of a MailMerge document**

1. On HRM Setup (G05B4), choose MailMerge Workbench Setup (P980014).

2. On Work With MailMerge Documents, click Find.
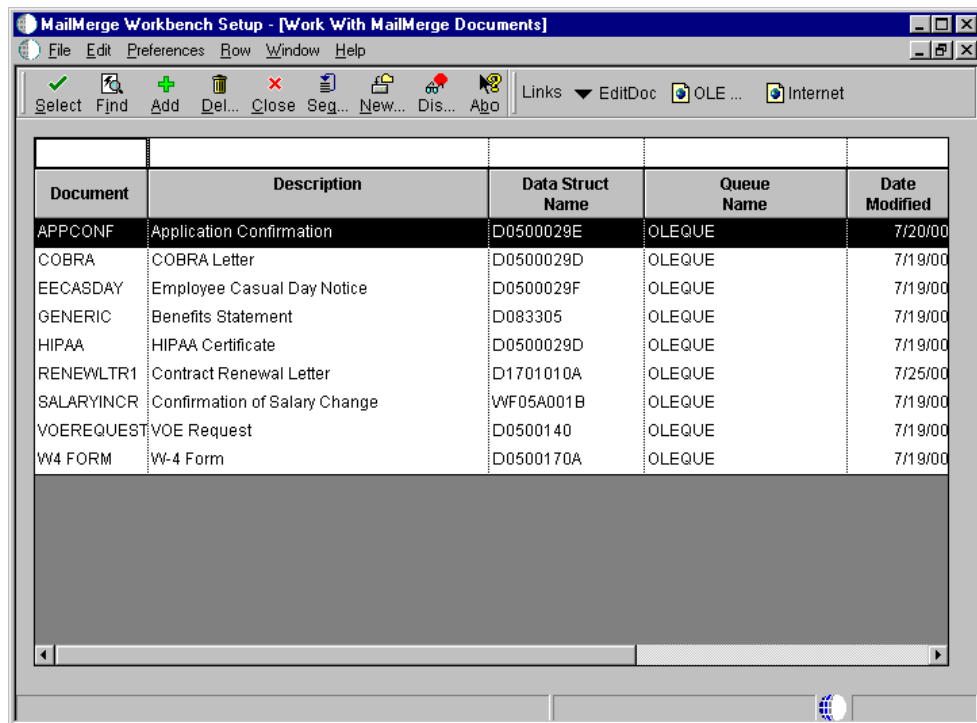
A list of available MailMerge documents appear in the detail area.

3. On Work With MailMerge Documents, choose the document and click Select.

   The MailMerge Document form appears.

4. On MailMerge Document, enter any changes into the following fields and then click OK:

   - Description

     Enter a text description of the MailMerge document.

   - Queue Name

     Enter OLEQUE into this field, which is a path location already set up for you in OneWorld. This location is where your MailMerge documents are stored. If you use your own queue, you should set it up on a central server so that others in the enterprise can access your MailMerge documents. The path information for OLEQUE is stored in the Media Object Queues (F98MOQUE) table.

   You cannot change the document name nor its data structure. If you want either of these to be different, you must add a new MailMerge document. See *Adding MailMerge Documents*.

   The Work With MailMerge Documents form appears.

► **To change the content of the MailMerge document**

You must have Microsoft Word 6.0 (or higher) on your local workstation to make changes to the content of a MailMerge document.

1. On HRM Setup (G05B4), choose MailMerge Workbench Setup (P980014). The Work With MailMerge Documents form appears.

2. On Work With MailMerge Documents, click Find. A list of available MailMerge documents appears in the detail area.

3. On Work With MailMerge Documents, choose the document, and from the Row menu, choose EditDoc.

   The document displays as a OneWorld media object with Microsoft Word as the editor.
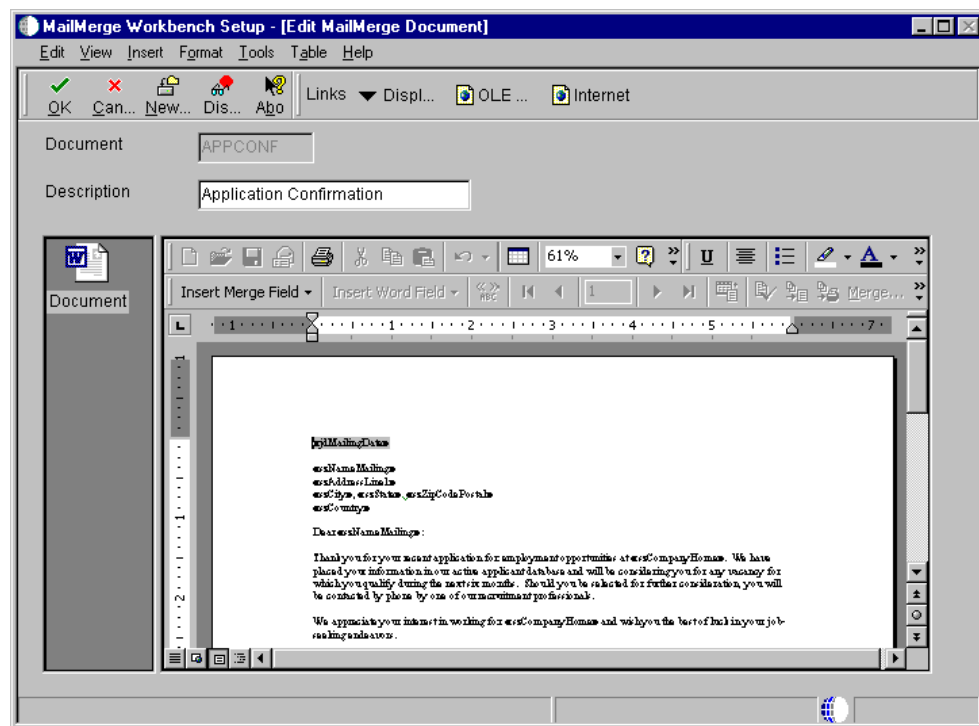
4. On Edit MailMerge Document, change the text of your document using Microsoft Word formatting controls and tools. See Microsoft Word documentation for information on how to use Microsoft Word.

5. Change MailMerge fields in your document.

   You can delete fields as you would delete any other text.

   To insert a new field, from the Insert Merge Field drop-down list on the Microsoft Word toolbar, choose a field.

6. Click OK when you have finished changing text and fields in your MailMerge document.

Adding MailMerge Documents

Several predefined MailMerge documents come installed with J.D. Edwards software. These documents should be sufficient for many of your applications. However, if you need to add your own documents, you will need to use Maintain MailMerge Documents in conjunction with creating or changing the business function that links the MailMerge document with the particular application's workflow process, such as Human Resource Management. You will also need to understand and use J.D. Edwards software data structures.
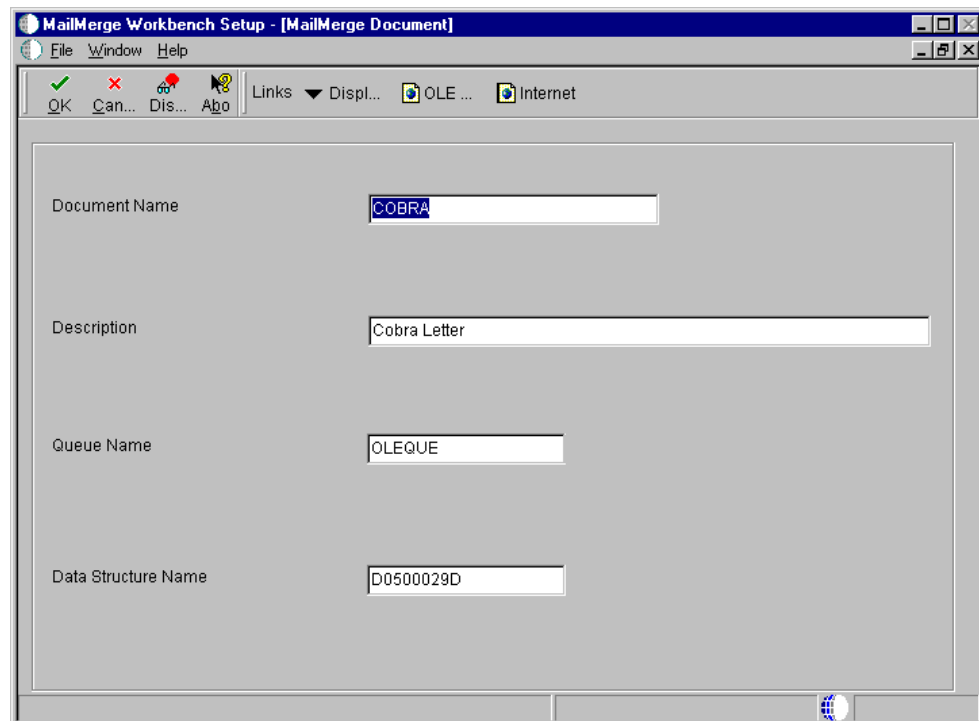
Caution

Only system administrators or information technology (IT) personnel should add MailMerge documents because it involves using J.D. Edwards software business functions and data structures.

This task explains how to add a document using Maintain MailMerge Documents. For information about business functions and data structures, see the *Development Tools* documentation.

► **To add MailMerge documents**

1. On HRM Setup (G05B4), choose MailMerge Workbench Setup (P980014).

2. On Work With MailMerge Documents, click Add.

3. On MailMerge Document, complete the following fields, then click OK:

   - Document Name

Enter the name that you want for your MailMerge document, which must be 10 or fewer characters long.

- Description

  Enter a text description of the MailMerge document.

- Queue Name

  Enter OLEQUE into this field, which is a path location already set up for you in OneWorld. This location is where your MailMerge documents are stored. If you use a queue other than OLEQUE, you should set it up on a central server so that others in the enterprise can access your MailMerge documents. The path information for OLEQUE is stored in the Media Object Queues (F98MOQUE) table.

- Data Structure Name

  Enter the name of the data structure that you want to use with your MailMerge document. The data structure contains all of the possible fields that you can use in your MailMerge document.

The Header Record Delimiters form appears. Use this form to specify what text symbol that OneWorld should recognize as the delimiter between fields in the header file. MailMerge uses the header file to identify the fields that you used in your MailMerge document. OneWorld automatically creates the header file.

4. On Header Record Delimiters, enter the following into the Field delimiter:

- |

The Data Record Delimiters form appears. Use this form to specify what text symbol that OneWorld should recognize as the delimiter between data in the data file. The data file contains the OneWorld record information that merges with your MailMerge document when it prints. OneWorld automatically creates the data file.

5. On Data Record Delimiters, enter the pipe | character into the Field delimiter field and click OK.

A new Microsoft Word document appears within the Edit MailMerge Document form.

6. Type the text of your document using Microsoft Word formatting controls and tools. See Microsoft Word documentation for information on how to use Microsoft Word.

7. Enter MailMerge fields into your document. From the Microsoft Word toolbar, on the Insert Merge Field menu, choose a field. You can enter fields as you type the text of your document.

   The data structure that you designated for your document determines what fields are available.

8. Click OK when you have finished entering text and fields into your MailMerge document.

For this new MailMerge document to work within your application's workflow, you must change the business function associated with the document. See the *Development Tools Guide* for information about changing business functions.

Deleting MailMerge Documents

Use Maintain MailMerge Documents to delete MailMerge documents.

Caution

Before you delete a MailMerge document, make sure it is not set up to print with an application's workflow process.

► **To delete MailMerge documents**
_____

1. On HRM Setup (G05B4), choose MailMerge Workbench Setup (P980014).

2. On Work With MailMerge Documents, click Find.

   A list of available MailMerge documents appears in the detail area.

3. On Work With MailMerge Documents, choose the document and click Delete.

   A message box appears to verify that you want to delete the selected document.

4. Click OK.

Interactive Versions for Applications

In OneWorld, a version is a user-defined set of specifications. These specifications help to control how interactive applications run. Interactive versions are associated with applications (usually as a menu selection) and always run on a OneWorld workstation.

Interactive versions for applications contain processing options with different sets of data for each version. These processing options are passed to the application when it runs.

Versions allow you to modify the behavior of applications because they exist independently of the application. Typically, administrators control the creation, modification, and location of the actual version tables. When you upgrade OneWorld applications to a new release level, you can apply the existing versions to the new applications.

When a user starts an interactive application, the user might have the option to choose from a list of versions. A user only has this option if the application designer attached processing options to the application. If the system administrator sets the application for blind execution during menu design, when the user starts the application, the application uses the default version without providing a list of versions. Depending on how you assign security to your OneWorld applications, end users can choose or create different versions based on business requirements.

For example, on the System Administration Tools menu (GH9011), the Interactive Versions option (P983051) does not have processing options attached, so a version does not exist for the application. However, the Work With Servers application (P986116) has processing options attached so that the system administrator must attach a version for the application. Otherwise, the application will not open successfully. For each interactive application, the system administrator can set up multiple versions that contain different specifications for each version, such as different levels of security.

How Processing Options Affect Versions

The processing options that you define in versions are a set of parameters that alter how an application runs. They are similar to initialization (.ini) files and command-line arguments for a traditional executable. These processing options let you specify the options that you want when you open an application. For example, you can specify how certain forms appear, show or hide a field, change the default status for order activity rules, and set default information to appear in a field.

The following list provides examples of how processing options allow you to set up run-time overrides for applications:

- Changes the functionality of an application. For example, you can set up processing options to turn on or off logic in order holds. You can also specify whether you want to automatically print pick slips after you enter an order based on a processing option value.

- Changes default values. For example, in Sales Order Entry you can set up processing options to set defaults for certain document type values (such as Sales Order or Sales Quote) or line type (such as stock or nonstock item).

- Controls the display of forms, such as hiding or showing a cost field, a price field, or a commission field.

Not all OneWorld applications have processing options. If the Prompt for Values option on the Edit menu is grayed out, no processing options are associated with the application, or the

system administrator has disabled the processing options. You must first attach processing options to an interactive application to use versions with the application.

The system administrator can secure a version for an application. In this case, the Prompt For Version option on the Edit menu appears grayed out. When a user opens a secured version of an application from the Work With Interactive Versions application, a security message appears to alert the user that he or she does not have access to the version.

How Interactive and Batch Versions Differ

Interactive versions have processing options and user overrides. Batch versions have processing options, data selection and sequencing, and template overrides. You do not check in and out interactive versions, whereas batch versions have local specifications that must be checked in and out.

See Also

❑ *Security* in the *System Administration* documentation for more information about securing processing options and versions

Working with Interactive Versions

When you work with interactive versions, you change processing options, version detail, and copy or create versions. Interactive versions must be associated with a menu selection through the Menu Design application (P0082) so that the system can run the version.

You can display the available versions for an interactive application from J.D. Edwards Explorer by choosing Prompt for Version from the Edit menu, or by choosing the Interactive Versions menu selection. Filter the versions that you want to display to show all versions or only your versions. To filter the version display, choose the Display option from the Form menu.

See Also

❑ *Creating Reports of Processing Options* for information about creating reports that show the processing option text and values for specified interactive and batch versions

Working with Version Detail for Interactive Versions

You use version detail to change a version's title, the method of prompting the user for processing options, or to specify a security level. You can also review information that includes when the version was last modified and the user who performed the modification.

▶ **To work with version detail for interactive versions**

Depending on your security level and the level of security for the version, you might not be able to change the version detail information.

1. On System Administration Tools (GH9011), choose Interactive Versions (P983051)

2. On Work With Interactive Versions, enter an application ID in the Interactive Application field and click Find. For example, to locate a version for the Sales Order Entry application, enter P4210.

3. In the grid, choose a version with which to work.

4. From the Row menu, choose Version Detail.

5. On Version Detail, you can modify the following information:

- Version Title

  Enter information that describes the use of a version in this field.

- Prompting

  The value that you enter determines whether the processing options for the version are disabled, run with blind execution, or chosen by the user at run time.

- Security

  The value that you enter in this field determines the security for the version, ranging from no security to full security. This security is based on the user and is not related to OneWorld application security. Depending upon your security level and the level of security for the version, you may not be able to work with version detail.

6. Review the additional information that appears on the form as needed.

Copying an Interactive Version

You can copy an existing version and then tailor its information to fit your needs. The copied version inherits the processing option values of the existing version.

When you copy a version, you should add security to the new version. Security settings range from none, which means anyone has the authority to modify or run a version, to full security, when only the person who last modified a version can modify and run the version. See the Security field description for more information.

► To copy an interactive version

Depending on your security level and the level of security for the version, you might not be able to copy the version.

1. On System Administration Tools (GH9011), choose Interactive Versions (P983051).
2. On Work With Interactive Versions, enter an application ID in the Interactive Application field and click Find. For example, to locate a version for the Address Book application, enter P01012.
3. In the grid, choose a version with which to work.
4. Click Copy.

   The Version Copy form appears.

5. On Version Copy, complete the following information and then click OK:

- New Version

  Enter a unique identifier for this version of the application in this field.

- Version Title

  Enter information that describes the use of a version in this field.

- Prompting Options

  The value that you enter in this field determines whether the processing options for the version are disabled, run with blind execution, or chosen by the user at run time.

- Security

  The value that you enter in this field determines the security for the version, ranging from no security to total security.

Creating (Adding) an Interactive Version

You can create (add) a new interactive version that is not based on an existing version. When you create an interactive version, you should add security to the new version. Security settings range from none, which means anyone has the authority to modify or run a version, up to full security, when only the person who last modified a version can modify and run the version. See the Security field description for more information.

▶ **To create (add) an interactive version**

1. On System Administration Tools (GH9011), choose Interactive Versions (P983051).

2. On Work With Interactive Versions, enter an application ID in the Interactive Application field and click Add. For example, to add a version for the Sales Order Entry application, enter P4210.

3. Click Add to create a new version.

4. On Version Add, complete the following fields:

   - Version

     Enter a unique identifier for this version of the application in this field.

   - Version Title

     Enter information that describes the use of a version in this field.

   - Prompting Options

     The value that you enter in this field determines how the version assigns processing options, such as no processing options or blind execution, or prompts the user to choose options at runtime.

     "Blank" is not a valid value when you add a version. All versions for interactive applications must have processing options attached.

   - Security

     The value that you enter in this field determines the security for the version, ranging from no security to full security.

See Also

- ❑ *Menu Design* in the *System Administration* documentation for information about how to add a version to a menu selection

- ❑ *Interactive Version Processing Options*

Batch Versions for Reports

In OneWorld, a batch version is a user-defined set of specifications. These specifications control how batch processes run. Typically, batch versions are associated with reports or batch processes, and run as batch jobs on a OneWorld enterprise server.

Batch versions for reports are a predefined set of specifications contained in a table that is separate from the base report or batch specifications. These specifications control the logical functions and report appearance. The version contains the processing instructions, which are a complete set of preselected processing options and additional characteristics specific to report design. Depending on how you assign security to your OneWorld applications, end users can choose or create different versions based on business requirements.

Versions are a powerful and convenient way to modify the behavior of reports. Typically, administrators control the creation, modification, and location of the initial batch version tables. When you upgrade OneWorld or a specific application to a new release level, you can apply the existing batch versions without additional modification.

When you start a batch application (that is, when you submit a batch job) you must use a batch version. Depending on how the report was designed, you might have the option to override processing option values for the version. However, you cannot add or select different processing values from those that already exist in the version. But you might be able to perform data sequencing and data selection or override default locations or the basic layout of the base report.

For example, suppose you have a report that prints the same financial information to two different audiences: an American subsidiary and a French subsidiary. You can create an American version, which shows financial information in dollars for a specific time period and formats the report for American-sized paper. You can also create a French version, which shows the financial information in francs for a different time period and formats the report for European-sized paper. For the French subsidiary, you could also display additional information on the report by adding data items in the French version.

Characteristics of Batch Versions

A batch version is defined by the following characteristics:

- Data sequencing at the version level. For example, you can sort checks by date or by check number. Or you can sort address book records by employee or customer, or sort records alphabetically.

- Data selection at the version level. For example, you can specify which records to fetch, such as Business Unit 10-30 and 70, or all Address Book records with Category 1=North.

- Additions or overrides at the version section level. At the version section level, report designers can use batch versions to add or override the functions of the base report sections. These section-level overrides differ from the version-level overrides because they apply only to individual sections. At the section level, the report designer can override data selection, data sequencing, event rules, and database output. You cannot delete functionality if it exists in the base report.

- A specific set of processing option values. For example, you can set a processing option value to run G/L Post to print a different account number format on the report.

  For batch versions, processing options do the following:

- Change functionality. For example, you can set a processing option to purge records to a history file after a report runs.

- Change input parameters. For example, you can set a processing option to specify which category code to use when processing a report.

- Define data. For example, you can set a processing option to define the fiscal year for which you want to run a report. You can also define the number of aging days in an Accounts Receivable aging report.

See Also

- ❑ *Understanding Batch Applications* in the *Development Tools* documentation

Working with Batch Versions

For batch versions, OneWorld uses the same process as the Object Management Workbench to check in, check out, and erase checkouts for versions. You use this tool to control the movement of versions between the workstation and the server. Batch versions are submitted directly from the batch application.

Just like base report specifications, when you create a batch version, the specification records for that version exist only on your workstation. To make the version available to other users, you must check the version into the server. When you check in a version, OneWorld copies the version's specification records to the central objects data source (server) according to the path code of your current environment.

After you check in your version, you can still make certain changes to the version without checking it out. For instance, a version's processing options are stored directly as a field in the version record that is stored in the server Version Lists table (F983051). So when you make changes to the processing options, these changes are effective immediately, even if you have not checked in your local version.

When you check a batch version into the central objects data source (server), anyone who installs and runs the version will be ensured of having the updated version. A version cannot be checked out by more than one user. The Version Detail form displays the user that has checked out a version.

You can create a new batch version that is not based on an existing version. For example, you might create a new version because you do not want to use the layout or data selection of the existing version. When you create a new version, you use the specifications provided by the base report.

If you make changes to the base (template) report, OneWorld automatically "pushes" any changes to all of the versions that exist for that base report, unless you created a version that contains overrides. See *Changing the Design of a Batch Version* in this section for information about overrides.

If you copy a version, the copied version inherits the same data selection and data sequencing as the existing version.

Running a Batch Version

If batch versions are associated with a form, you can access them for viewing and printing from the form's Reports menu. Base reports and versions of those reports are available on menus as icons.

In most cases, you submit batch versions to an enterprise server, which can more efficiently handle the processing. The OneWorld environment you sign onto specifies where your batch versions will run, though you can override this location when you submit a batch version. When you submit your batch job to the server, you can preview the report and use the Work With Servers form to monitor the progress of your job on the queue. See *The Work with Servers Program* in the *System Administration* guide for information about the Work With Servers form.

When you submit a report to the enterprise server, if the report specifications do not currently reside on your workstation, the central objects data source (server) first performs JITI (just-in-time installation) to transfer the specifications to your workstation. After the JITI, your workstation continues with the submission of the report to the enterprise server, and OneWorld transfers the local version specifications (any changes you made to the version) to the enterprise server.

See Also

❑ *Submitting a Report* in the *Enterprise Report Writing* documentation for complete information about running a batch version

Accessing the Work With Batch Versions Form

You can access the Work With Batch Versions form, which is the entry point to managing batch versions, in one of several ways.

▶ **To access the Work With Batch Versions form**

- From any menu with a batch application on it, choose the batch application. From the Edit menu, choose Prompt For and then choose Version.

- From any menu with a batch application on it, right-click on the batch application, choose Prompt For, and then choose Version. If no versions are associated with the batch application, you must copy or add a version and run that version as explained in this section.

- On the System Administration Tools (GH9011) menu, choose Batch Versions (P98305).

    The Work With Batch Versions form appears.

Changing the Design of a Batch Version

If you want to change the report specifications for a version, you do not need to change the base (template) report. You can override the report specifications at the version level as explained in this task. The changes you make to the report specifications for the version do not affect any other versions associated with the base report. However, if you make changes to specifications at the base-report level, those changes will not be pushed down to the version specifications that you override.

When you make changes to specifications at the version level, you should include a description of your modifications in the Version Detail field on the Version Detail form. The description should include any differences between the base report specifications and the version specifications. See *Working with Version Detail for Batch Versions* in this section for more information.

Before You Begin

❑ Override specifications only at the version level. To copy or create a version to override, see *Copying a Batch Version* or *Creating a Batch Version*.

❑ Check out the version before you access Report Design to create a version override; see *Checking Out or Checking In a Batch Version*.

❑ Close the Report Design tool if it is open on your computer.

► **To change the design of a batch version**

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305). Alternatively, from the Financial Reporting Setup menu (G1041), choose Batch Versions List (P98305).

   The Work With Batch Versions - Available Versions form appears.

   On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. Type an application ID in the Batch Application field. For example, to locate a version for the One Line Per Address report, type R014021**.**

3. Click Find to locate the versions available on your workstation.

   For alternate lists of versions, from the Form menu, choose Display, then one of the following:

   • Available Versions for the versions available on your workstation

   • My Versions for just the versions you created

   • All Versions for any version that exists for the batch application

     When you view all versions, you can work only with versions that appear with black text.

   You can, however, delete any version (depending upon your application and user security). If you try to delete a version that is not on your machine, a warning message appears.

4. In the detail area, choose a version with which you want to work.

5. From the Row menu, choose Advanced.

   The Advanced Operations form appears.

   Note

   Before you can complete the following steps, you must have already checked out a version of the report; see *Checking Out or Checking In a Batch Version*.

6. From the Row menu, choose Design Version.

   Report Design opens with the report specifications for the version.

7. Click a section. Then from the Section menu, choose Override Version Specifications. You cannot make any changes to a section until you access the Override Version Specifications form and choose which overrides you want to change.

Depending on the type of section with which you are working, the Columnar, Tabular, or Group Section - Override form appears.

Any overrides you make to a section are valid only for that section. You need to override additional sections separately.

8. Select any of the following overrides:

Note

Keep in mind that if you override any version specifications, those specifications will not be updated if you then make changes to those specifications in the base (template) report. For example, if you turn on the Section Data Selection override and make changes to the version's data selection, and then later you change the data selection of the base report, the base-report data selection changes will not be pushed down to the version.

- Section Layout

  Select this override if you need to change section properties or to delete a column, add a new column, move a column, or make column heading changes on a report version.

- Section Data Selection

  Select this override if you need to have report versions that utilize specific data selection, such as a version for customer information only and a version for employee information only.

- Section Event Rules

  Select this override if you need a report version that utilizes a specific event rule, such as a version for employee information with a calculated percentage raise amount, date title, or Balance Auditor.

- Section Database Output

  Select this override if you need a report version that prints to a specific location other than the default printer location. If you want other sections, such as the page header, to also print to this location, you need to override the specifications to each of those sections as well.

- Section Sort Sequence

  Select this override if you need a report version that is sorted differently than the base report. For example, you can have a version sort by name rather than by address number.

9. The changes you make will affect only the version on your local workstation. To make these changes available to the enterprise, you must now check in the version; see *Checking Out or Checking In a Batch Version* in this section. If you do not check in the version, make sure you erase your check out so that others can check out this version; see Erasing the Check-Out Record of a Version in this section.

Changing Processing Options for Batch Versions

You can change the processing option settings for an existing batch version to suit your needs. For example, you can change processing option values that direct the system to show or hide a field or change order activity rules. However, not all batch versions have processing options associated with them. For example, a list of addresses might not require special prompting.

Processing option changes are stored and applied only to the current instance of the batch version. Unlike other changes to versions, changes to processing option values do not require you to check in or check out the version. Anyone who uses that version after you make the change will not be affected by the new processing option values.

Note

You should not modify J.D. Edwards demo versions, which contain ZJDE or XJDE prefixes. You should either copy these versions or create new versions to change any values, including the version number, version title, prompting options, security, and processing options.

► **To change processing options for batch versions**

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305).

    The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. Type an application ID in the Batch Application field. For example, to locate a version for the One Line Per Address report, type R014021.

3. Click Find to locate the versions available on your workstation.

    For alternate lists of versions, from the Form menu, choose Display, then one of the following:

    - Available Versions for the versions available on your workstation

    - My Versions for just the versions you created

    - All Versions for any version that exists for the batch application

      When you view all versions, you can work only with versions that appear with black text.

4. In the detail area, choose a version with which you want to work.

    The Work With Batch Versions form shows only the versions available to your workstation, including any versions you create locally. Versions created on another machine must first be checked in to the central objects data source (server) before they appear on this form.

5. From the Row menu, choose Processing Options.

    If processing options do not exist for this version, or if you have been secured from changing processing options, a message box appears informing you of this;

otherwise, the Processing Options form appears for the application. On this form, you can define the values that control how your report processes.

You can also access the Processing Options form the following ways:

- Choose a batch application, and then choose Prompt for Values from the Edit menu on J.D. Edwards Explorer.

- Right-click on the batch application name in J.D. Edwards Explorer, and then choose Prompt for Values from the pull-down menu that appears.

6. Click each tab to view and change information on that tab.

    If there are numerous tabs and you cannot see all of them, left and right arrow buttons appear on the form. Click the arrow buttons to view the other tabs. You can also resize the Processing Options form by pointing to the edge of the form and dragging, or use the scroll bar to view additional processing options on a tab.

7. Change the processing option values as appropriate, and then click OK.

Accessing Data Selection and Sequencing for Batch Versions

With batch versions, you can select certain values of your data to narrow the range of your report. For example, you can select to view only customers from New York. You can also sequence how you want your data presented in the report. For example, you can place your search type field first, followed by your address number, and then employee names.

You can select and sequence your data from one of two places, either from the Work With Batch Versions form, as explained here, or from the Version Prompting form, as explained in *Submitting a Report*. With either method, any changes you make with selections and sequences remain with that version. Every successive run (from the same workstation) of that version will use the changed selection and sequencing.

Before You Begin

❑ If you access data selection and sequencing from the Row menu of the Work With Batch Versions form, as explained below, you must check out the version to your machine. See *Checking Out or Checking In a Batch Version*.

► To access data selection and sequencing for batch versions

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305).

    The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. Type an application ID in the Batch Application field. For example, to locate a version for the One Line Per Address report, type R014021.

3. Click Find to locate the versions available on your workstation.

    For alternate lists of versions, from the Form menu, choose Display, then one of the following:

- Available Versions for the versions available on your workstation

- My Versions for just the versions you created

- All Versions for any version that exists for the batch application

When you view all versions, you can work only with versions that appear with black text.

4. In the detail area, choose a version with which you want to work. The version must be checked out.

5. From the Row menu, choose one of the following:

- Data Selection

  The Data Selection form appears.

- Data Sequencing

  The Selection Data Sequencing form appears.

  When you are working with table conversion batch applications, OneWorld grays out the Data Selection and Data Sequencing menu items because they do not apply to table conversions.

6. The changes you make affect only the version on your local workstation. To make these changes available to the enterprise, you must now check in the version; see *Checking Out or Checking In a Batch Version* in this section. If you do not check in the version, make sure you erase your check out so that others can check out this version; see *Erasing the Check-Out Record of a Version* in this section.

Creating Reports of Processing Options

This task explains how to create reports about processing options for interactive and batch application versions. This report shows the tab, text, and value of any processing option attached to an application's version (not all versions have processing options).

Caution

Run this process only locally (on your workstation).

► **To create reports of processing options**

1. From the System Administration Tools (GH9011), choose Batch Versions (P98305) or choose Interactive Versions (P98301).

   The Work With Batch Versions - Available Versions form appears or the Work With Interactive Versions form appears.

2. Type an application ID in the Batch Application field or the Interactive Application field. For example, to locate a version for the General Journal by Batch report, type R09301 into the Batch Application field.

3. Click Find to locate the versions available on your workstation.

4. Do one of the following:

- Choose a version. Then from the Row menu, choose Processing Options to view the version's default values.

- Choose a version. Then from the Row menu, choose Print Options.

- Without choosing a version, from the Form menu, choose Print Options.

The Report Output Destination form appears.

5. Specify one of the following, and then click OK:

- On Screen

- To Printer

- Export to CSV

- OSA Interface Name

The report processes.

Accessing Properties for Table Conversion Versions

This task is only for table conversion batch applications. You can access the version's properties from the Table Conversion Prompting form, as explained in *Submitting a Table Conversion* in the *OneWorld Data Conversion* guide. You can also access properties directly from the Work With Batch Versions form.

Before You Begin

❑ If you access properties from the Row menu of the Work With Batch Versions form, as explained below, you must check out the version to your machine. See *Checking Out or Checking In a Batch Version*.

▶ **To access properties for table conversion versions**

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305).

   The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of table conversions.

2. Type a table conversion application ID in the Batch Application field.

3. Click Find to locate the versions available on your workstation.

   For alternate lists of versions, from the Form menu, choose Display, then one of the following:

- Available Versions for the versions available on your workstation

- My Versions for just the versions you created

- All Versions for any version that exists for the batch application

  When you view all versions, you can work only with versions that appear with black text.

4. In the detail area, choose a version with which you want to work. The version must be checked out.

5. From the Row menu, click Properties. This menu selection is enabled only for table conversions.

   The Properties form appears. See *Submitting a Table Conversion* in the *OneWorld Data Conversion* guide for information about changing table conversion properties.

6. The changes you make will affect only the version on your local workstation. To make these changes available to the enterprise, you must now check in the version; see *Checking Out or Checking In a Batch Version* in this section. If you do not check in

the version, make sure you erase your check out so that others can check out this version; see *Erasing the Check-Out Record of a Version* in this section.

Working with Version Detail for Batch Versions

Use version detail to review information about a version, such as its title, the prompting options associated with it, or the security level. You can also specify whether to print a cover page on a report.

Before You Begin

❑ Check out the version before you work with version detail; see *Checking Out or Checking In a Batch Version*.

► **To work with version detail for batch versions**

1. From the System Administration Tools menu(GH9011), choose Batch Versions (P98305).

   The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. Type an application ID in the Batch Application field. For example, to locate a version for the One Line Per Address report, type R014021.

3. Click Find to locate the versions available on your workstation.

   For alternate lists of versions, from the Form menu, choose Display, then one of the following:

   - Available Versions for the versions available on your workstation

   - My Versions for just the versions you created

   - All Versions for any version that exists for the batch application

     When you view all versions, you can work only with versions that appear with black text.

4. In the grid, highlight a version with which you want to work. The version must be checked out.

5. From the Row menu, choose Version Detail.

   The Version Detail form appears.

   On this form, you can change information such as the title of the version, how the version uses processing options, and the security level for the version. You can also review background information about the report.

6. Modify or complete the following information:

   - Version Title

   - Prompting

     This option appears only if processing options are attached to this version.

   - Security

- Version Detail

- Print Cover Page

- Job Queue

  If you leave the Job Queue field blank, OneWorld reads the setting in the jde.ini on the enterprise server. If you submit the job to an AS/400, OneWorld looks to your user profile to determine the job queue.

7. Review the additional information that appears on the form as needed.

8. Click OK.

9. Check in this version to make it available to the enterprise; see *Checking Out or Checking In a Batch Version* in this section.

Copying a Batch Version

You can copy an existing version and then tailor its information to fit your needs. The copied version inherits all the report and version properties of the original version, including overrides.

When you copy a batch version, you should add security to the new version. Security settings range from none, which means anyone has the authority to modify or run a version, to full security, in which only the person who last modified a version can modify and run the version. Version security is separate from Security Workbench, which allows you to set security for different J.D. Edwards software objects, such as applications. For information about Security Workbench, see *Security* in the *System Administration* documentation.

► To copy a batch version

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305).

   The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. Type an application ID in the Batch Application field. For example, to locate a version for the One Line Per Address report, type R014021.

3. Click Find to locate the versions available on your workstation.

   For alternate lists of versions, from the Form menu, choose Display, then one of the following:

- Available Versions for the versions available on your workstation

- My Versions for just the versions you created

- All Versions for any version that exists for the batch application

  When you view all versions, you can work only with versions that appear with black text.

4. In the detail area, choose a version with which to work.

5. Click Copy on the toolbar.

   The Version Copy form appears.

6. Enter the following information:

    - New Version

    - Security

    - Version Title

7. Click OK to save your version and return to the Work With Batch Versions form.

    When you click OK to copy a report version, if the version specifications do not currently reside on your workstation, the central objects data source (server) performs JITI (Just-in-time Installation) to transfer the specifications to your workstation.

8. Check in the new version to make this version available to the enterprise; see *Checking Out or Checking In a Batch Version* in this section.

Creating a Batch Version

You can create a new batch version that is based solely on the base version of an existing report. Unlike copying a version, when you create a batch version, the new version does not inherit the base version's overrides. By creating a new version, you are starting with the specifications provided by the base report.

When you create a batch version, you should add security to the new version. Security settings range from none, which means anyone has the authority to modify or run a version, to full security, in which only the person who last modified a version can modify and run the version. Refer to the Security field description for more information. Version security is separate from Security Workbench, which allows you to set security for different J.D. Edwards software objects, such as applications. For information about Security Workbench, see *Security* in the *System Administration* documentation.

► To create a batch version

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305).

    The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. In the Batch Application field, enter the batch application upon which you want to base the new batch version.

3. Click Add to create a new version.

    The Version Add form appears.

4. On the Version Add form, complete the following information:

    - Version

    - Version Title

    - Prompting Options

        If the batch application on which you base your version does not have any processing options attached, OneWorld leaves the Prompting Options field

inactive. You can attach processing options only to a batch application template in Report Design.

- Security

- Job Queue

- Version Detail

- Print Cover Page

5. Click OK to save your version and return to the Work With Batch Versions form.

6. Check in the new version to make this version available to the enterprise; see *Checking Out or Checking In a Batch Version* in this section.

Checking Out or Checking In a Batch Version

To modify a report version using Report Design or to set data selection and sequencing using the row exits, you must first check out the report version. The check-out procedure copies the specification records from the central objects location to your workstation. This is based on your path code. Only versions in that central objects path code will be visible. You cannot access Report Design until you check out the version. A version cannot be checked out by more than one user at a time.

If you have checked out a version but are not going to make changes to it, erase the check-out record so others can check out that version. You need to check out a version to make changes that are overrides to the base (template) report. You do not need to check out a version if you make the following changes at the time you run the version: data selection, data sequencing, override location, or processing option values. However, if you make changes to data selection or data sequencing from the Work With Batch Versions form, you must check out and check in the version to save those changes and make them available to the enterprise.

Before you check in a version, make sure that you want to make permanent changes. When you check in a version, the system copies the report specifications back to the central objects location. These new specifications will override the previous specifications for that version. The report specifications on your workstation remain intact.

You can check batch versions in or out with the Object Management Workbench or with the Batch Versions application as described in the next task.

▶ **To check out or check in a batch version**

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305)

    The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. Type an application ID in the Batch Application field, and then click Find. For example, to locate a version for the One Line Per Address report, type R014021.

3. In the detail area, choose a version with which to work.

4. From the Row menu, choose Advanced.

The Advanced Operations form appears. On this form, you can design report specifications for the version, check in and check out versions, and erase the check out for a version.

5. Choose a version to check out or to check in.

6. From the Row menu, choose either Check Out Version or Check In Version.

7. Click Yes.

Erasing the Check-Out Record of a Version

Batch versions can be checked out by only one person at a time. Erasing the check out record allows another user to check out the version. After you have erased a check-out, you cannot check in that version. However, the report specifications on your workstation remain intact.

The Erase Check-Out procedure changes the status of the server-based record of version check-in and check-out. When you erase a check-out of a version, OneWorld updates the Checked Out field in the Versions List table (F983051) from a Y to an N. OneWorld also updates the version's Location field in the Versions List table. This value is changed from the location of the workstation that checked out the version to the machine name of the central object's server.

You can erase the check-out of batch versions with the Object Management Workbench or with the Batch Versions application as described in the next task.

► To erase the check-out record of a version

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305).

   The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. Type an application ID in the Batch Application field and click Find. For example, to locate a version for the One Line Per Address report, type R014021.

3. In the detail area, choose a version with which to work.

4. From the Row menu, choose Advanced.

   The Advanced Operations form appears. On this form, you can design report specifications for the version, check in and check out versions and reports, and erase the check out for a version.

5. On Advanced Operations, choose the check-out record you want to erase.

6. From the Row menu, choose Erase Check Out.

Changing Batch Versions (P98305) Processing Options

This task explains how to change the processing options for the Batch Versions (P98305) application.

Processing option changes are stored for each UBE run. Unlike other changes to versions, changes to processing option values do not require you to check in or check out the version. Anyone who uses that version after you make the change will not be affected by the new processing option values.

See Also

❑ *Changing Processing Options for Batch Versions* for instructions on changing processing options for batch versions in general

► **To change Batch Versions**

1. From the System Administration Tools menu (GH9011), right-click Batch Versions (P98305), choose Prompt For, and then choose Values from the resulting pop-up menu.

   If you have been secured from changing processing options, a message box appears informing you of this; otherwise, the Processing Options form appears.

2. On the Processing Options form, complete the following fields:

   • Option 1: Confirmation Box

   Enter a Y or 1 to enable, or enter N or 0 to disable the overwrite/delete local specifications confirmation box. If you enable the confirmation box, it appears when OneWorld is about to overwrite or delete specifications on your local machine. For example, when enabled, the confirmation box appears when you check out a batch version.

   • Option 2: Schedule Job

   Enter a 0 (or leave the field blank) to not allow users to schedule when their batch versions run, meaning their batch version runs as soon as they submit it; enter a 1 to give the users the option of scheduling their batch versions; enter a 2 to force the users to always schedule their batch versions.

   See *Scheduling Jobs* in the *System Administration* documentation for complete information about how to schedule batch versions.

Accessing BrowsER for a Report or Version

BrowsER is an application you can use to view event rules and design layout for your reports and versions. BrowsER displays the structure of sections within a batch application. The sections are displayed in a hierarchical structure, with events and event rules for each section. You can enable or disable one or more event rules without extensive work in the design tools. This is useful for debugging specific event rules. For complete information about using BrowsER, see *Working with BrowsER* in the *Development Tools* documentation.

► **To access BrowsER for a report or version**

1. From the System Administration Tools menu (GH9011), choose Batch Versions (P98305).

   The Work With Batch Versions - Available Versions form appears. On this form you can locate and run versions of reports. Also, you can modify version detail information, data selection, and data sequencing.

2. Type an application ID in the Batch Application field. For example, to locate a version for the One Line Per Address report, type R014021**.**

3. Click Find to locate the versions available on your workstation.

   For alternate lists of versions, from the Form menu, choose Display, then one of the following:

- Available Versions for the versions available on your workstation

- My Versions for just the versions you created

- All Versions for any version that exists for the batch application

    When you view all versions, you can work only with versions that appear with black text.

4. In the detail area, choose a version with which you want to work.

5. From the Row menu, choose Advanced.

    The Advanced Operations form appears. On this form, you can design report specifications for the version, check in and check out versions and reports, and erase the check out for a version.

6. From the Form menu, choose either Report BrowsER or Version BrowsER.

    If you select Report BrowsER, you can enable or disable event rules for the report. If you select Version BrowsER, you can enable or disable event rules for a specific version of the report. When you are working with table conversion batch applications, OneWorld grays out the Version BrowsER button because it does not apply to table conversions.

    The BrowsER form appears.

Moving Batch Version Specifications to an Enterprise Server

You can move batch version specifications to an enterprise server without actually running the batch version. You need to do this only when you have modified a batch version that is called by another batch version. After you modify the version, use this option to move its specifications to the same location as the batch version that calls it. This ensures that the batch version calls the updated specifications rather than obsolete specifications.

► **To move batch version specifications to an enterprise server**

1. On the ActivEra Solution Explorer, perform one of the following to access the Work With Batch Versions form:

    - From a menu, double-click a report icon.

    - From the System Administration Tools menu (GH9011), choose Batch Versions.

2. On Work With Batch Versions - Available Versions, complete the following field if necessary:

    - Batch Application

3. Click Find to display a list of versions based on the batch application you enter in the Batch Application field.

4. Choose the report version you want to submit, and then click Select.

    The Version Prompting form appears.

5. From the Form menu, choose Advanced.

    The Advanced Version Prompting form appears.

6. Turn on the following options, and then click OK:

- Submit Version Specifications Only

  Turn this option on to move batch version specifications to an enterprise server that you specify.

- Override Location

  Turn this option on to access the JDE Data Sources form, which you use to specify the location of the enterprise server to which you want to move the batch version specifications.

7. On JDE Data Sources, choose the enterprise server to which you want to move the batch version specifications, and then click Select.

The batch version that you indicated will not run, but OneWorld moves the batch version specifications to the enterprise server that you specified. You can use the Work With Servers form to monitor the progress of your job on the queue. See *The Work with Servers Program* in the *System Administration* documentation for information about the Work With Servers form.

Processing Options

A processing option is a parameter in which you enter a value to control how an interactive or batch program runs.

You use processing options to instruct the system to perform specific functions to meet your business needs. If a program contains processing options, you set the required and optional processing options for the program during setup or before you run or submit a program.

You can create different versions of each program if your business needs require specific processing for different processes. You can then set these unique processing options differently in multiple versions of the same application. Changes to processing options immediately affect that version for every user. Anyone who uses that version after you make the change uses the new processing option values. You can also use processing options to access a version of another program.

Caution

XJDE versions are considered owned by J.D. Edwards. During an upgrade, J.D. Edwards might overwrite these versions. You should only use these versions as templates for your own versions.

ZJDE versions are used for default purposes, and are typically interactive applications or versions that are called from another application. You usually attach these versions to a menu. You can set these processing options. When called from a menu, interactive applications with a version are called with a blind execution based on predetermined processing option values.

Processing Option Functions

Use processing options to:

- Set up default values

- Customize an application for different companies or even different users

- Control the format of forms and reports

- Control page breaks and the location where totaling occurs for reports

Processing options appear in the system as a tabbed form. Tabs organize the processing options by purpose and function. Each processing option tab contains:

- Standard or unique tab name

- Processing option titles

- Lists of valid values

- Tab-specific help text (enhanced processing options)

    You access tab-specific help text using the Help button. This text provides a brief description of the business purpose of the processing options, the interdependencies among the processing options, and the consequences of their use.

- Online help (enhanced processing options)

You access the online help using the F1 key or by right-clicking and choosing What's This? from the menu. The glossary text describes the function of the processing option, and the actions or consequences of using the valid values.

Types of Processing Options

The two standards for processing options are "enhanced" and "nonenhanced."

Enhanced processing options provide you with more detailed user information. For example, the user can glance at the field name and valid values on the tab and quickly determine how to use the processing option, or the user can access online help by pressing F1 on the processing option for a detailed explanation. These processing options have been enhanced to new J.D. Edwards standards. Enhanced processing option forms have a number, a brief title, and, if applicable, a concise list of valid values. These processing options have online help attached to them.

Nonenhanced processing options only provide you with a description in paragraph form. Sometimes these fields have no title. They are numbered, and each number is followed by an explanation of any relevant information (usually valid values) in paragraph form. The processing option numbers will sometimes span across all tabs. The fields typically have data items attached but do not follow the same naming conventions as enhanced processing options

Examples

Enhanced Processing Options:

Nonenhanced Processing Options:

Working With Processing Options

You have two options for working with processing options:

- Working with processing options from a menu

- Working with processing options from a version list

How Processing Options Work From a Menu

You can access processing options for an object either from the menu bar or by right-clicking the object. In either case, one of the options is Prompt For. The Prompt For submenu contains the following options, when available:

Values   Choose this option to specify processing option values.

Version   Choose this option to select which version of the object to run. Depending on how the version was designed, you might be prompted to enter processing option values after you select the version, or you might be able to modify them from the Row menu.

Data Selection   Choose this option to specify which data to use.

Data Selection and Values   Choose this option to specify which data to use and then to specify processing option values.

If you choose to run processing options from a menu, the processing details defined at the menu level take precedence. Not all objects allow you to select from all four of these options.

See Also

❑ *Working With Version Detail for Interactive Versions*

Interactive Version Processing Options

The processing options that you define in interactive versions are a set of parameters that alter how an application runs. They are similar to initialization (.ini) files and command-line arguments for a traditional executable. These processing options let you specify the options that you want when you open an application. For example, you can specify how certain forms appear, show or hide a field, change the default status for order activity rules, and set default information to appear in a field.

Not all OneWorld applications have processing options. If the Prompt for Values option on the Edit menu is grayed out, either no processing options are associated with the application or the system administrator has secured a version for the application. When you open a secured version from the Interactive Versions application, a security message appears to inform you that you do not have access to the version.

You must first set processing options for an interactive application before you use versions with the application.

Using processing options, you set up interactive programs to suit your business requirements. For interactive versions, processing options do the following:

- Change functions. For example, you can set a processing option to turn on or off order holds. You can also specify whether you want to automatically print pick slips after you enter an order that is based on a processing option value.

- Change default values. For example, you can set the processing options to set defaults for document types (such as quote orders or purchase orders) or line types (such as stock or nonstock items).

- Control the display of forms. For example, you can set the processing options to hide or show a cost field, a price field, or a commission field.

► **To manually launch processing options for interactive versions**

1. From an Explorer, highlight the application for which you want to set processing options.

2. Right-click the application and choose Prompt for Values from the menu.

3. On Processing Options, enter appropriate values where applicable and click OK.

Batch Version Processing Options

You can change the processing options for an existing batch version to suit your business requirements. For example, you can change processing option values that specify a range of dates for a report. However, not all batch versions have processing options associated with them. For example, a list of addresses might not require special prompting.

For batch versions, processing options do the following:

- Change functionality. For example, you can set a processing option to move records to a history file after a report runs.

- Change input parameters. For example, you can set a processing option to specify which category code to use when processing a report.

- Define data. For example, you can set a processing option to define the fiscal year for which you want to run a report. You can also define the employee information included in a report.

▶ **To manually launch processing options for batch versions**

1. From an Explorer, choose a report or other batch application for which you want to set processing options.

2. On Work With Batch Versions - Available Versions, find and highlight a version of the report or other batch application.

3. On Work With Batch Versions - Available Versions, choose Processing Options from the Row menu.

4.   On Processing Options, enter appropriate values where applicable and click OK.

Using Processing Options for Master Business Functions

The purpose of a master business function (MBF) is to provide a central location for standard business rules about entering documents such as vouchers, invoices, and journal entries.

The master business function is composed of processing options that are shared by certain programs. For example, the processing options for the journal entry MBF are used by the following journal entry programs:

- Journal Entries (P0911)

- Journal Entries with VAT (P09106)

- Journal Entry Batch Processor (R09110Z)

- Store and Forward JE Batch Processor (R09110ZS)

- Recurring Journal Entry Compute & Print (R09302)

- Indexed Comp Compute and Print Report(R093021)

- Variable Numerator Compute and Print (R093022)

► **To review versions and processing options for a master business function**

1.   From the System Administration Tools menu (GH9011), choose Interactive Versions.

2.   On Work With Interactive Versions, type the application number in the Interactive Application field and click Find. For example, enter P0900049.

3.   Choose a version.

4.   To review the processing option settings for the version, choose Processing Options from the Row menu.

See Also

❑   *Processing Options* in the *Development Tools* documentation

❑   For specific master business function information, see the documentation for the related application

User Defined Codes

Most OneWorld forms contain fields. Some fields allow you to enter any value, and some require you to choose from a list of valid values. A user defined code (UDC) is one value in a set of values that you have assigned as valid for a field. You can use UDCs to categorize your data and make sure that users provide consistent input on forms. Because users can choose only values from the list, UDCs provide a way to simplify, standardize, and validate the data that is contained in fields.

From any OneWorld application, you can identify fields that have UDCs attached to them by using the visual assist button that appears when you tab into or click on a field. If you do not know the value to enter in a field that has a user defined code attached to it, click on the visual assist button, which accesses the Select User Define Code form. This form displays all valid values in the user defined code tables for this field. You can then choose the valid value to use.

OneWorld provides predefined UDCs, but many of the UDCs that you need to use are unique to your enterprise, and your needs are likely to change. Therefore, OneWorld lets you change, add, and delete UDCs to meet the needs of your enterprise. When you upgrade OneWorld, your customized UDCs will remain.

For more information review the following topics:

- UDCs, UDC types, and category codes
- Example: user defined codes in address book
- Customizing UDCs and UDC types
- Consequences of Customizing UDCs
- OneWorld UDC tables

UDCs, UDC Types, and Category Codes

A UDC is one value in a set of values that you have assigned as valid for a field. A UDC is made up of two parts. The first part is the code, which consists of the characters that you enter in a field. The second part is the description, which is text that describes what the code means. For example, on the Work With Addresses form, you can enter the code "A" to designate an "Applicant" in the Search Type field. This code becomes part of the data stored with a record.

A UDC type is the complete set of UDCs that are allowed as values for a field. A UDC type is made up of a code type, which is its two-character name, and a description. Examples of UDC types are "ST - Search Type" and "UM - Unit of Measure." UDC types are sometimes referred to as UDC lists.

Each UDC type is associated with a OneWorld product code. You can identify any set of UDCs by its product code and its code type. For example, the Address Book (product code 01) list of search types (code type ST) is referred to as UDC 01/ST.

The figure below illustrates the structure of user defined code tables:

```
                            Product Code
                          Address Book (01)
                                 |
          +----------------------+----------------------+
          |                      |                      |
User Defined Code Type    User Defined Code Type    User Defined Code Type
ST      Search Type       LP      Language          PH      Phone Types
                                  Preferences

            E    Employee          F    French          CAR    Car or
UDCs                        UDCs                  UDCs          Mobile

            V    Vendor            I    Italian        HOM    Home

            C    Customer          S    Spanish        FAX    FAX
```
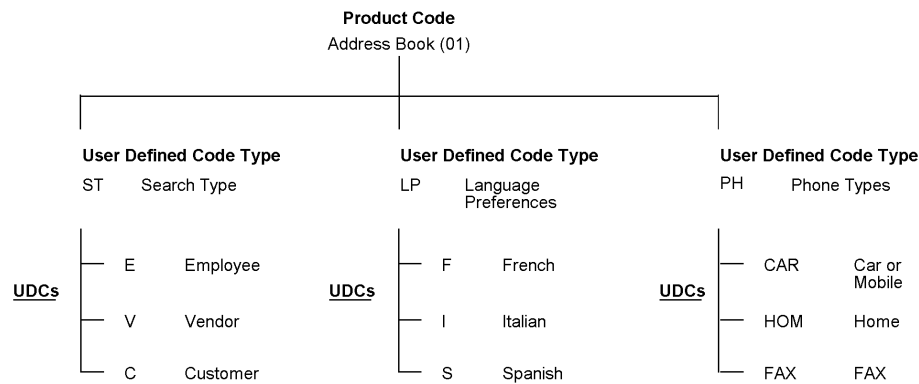
Throughout OneWorld you will see references to category codes. Category codes are UDC types that OneWorld provides for you to customize according to your needs. You can change the code type and the description, and you can redefine the UDCs within it as appropriate for your purposes. For example, you might see a UDC type called Category Code 01. You can change its description and define the UDCs within it to suit your business needs.

Example: User Defined Codes in Address Book

Every OneWorld product uses UDCs. For example, Address Book uses a field called Search Type to classify the entries in the address book. When you click the visual assist button on the Search Type field on the Work With Addresses form, a list of the search types appears. These search types are UDCs. Some of the search types include:

- A - Applicants
- C - Customers
- V - Suppliers
- E - Employees

You can use these UDCs to classify your address book entries, and you can add or change UDCs to accommodate your needs. For example, if you need to categorize some of your address book entries as students, you can add a UDC to the list: "S - Students."

UDCs are also used to supply values for:

- State and province codes
- Units of measure
- Document types
- Languages

When you click the visual assist for a field and OneWorld displays the Select User Defined Code form, you will know you are working with UDCs.

Customizing UDCs and UDC Types

OneWorld provides many UDC types containing predefined UDCs. Some of the UDCs are hard coded, which means that certain OneWorld applications depend on specific values, so

you should not change them. However, if a UDC is not hard coded, you can change it to suit your business needs.

You can change, add, and delete UDCs in the following ways:

- You can change the code or the description of a UDC in an existing UDC type. For example, in UDC 01/ST, a medical institution might change the UDC for "C - Customers" to "P - Patients" to more accurately describe that category.

- You can add UDCs to an existing UDC type. For example, in the Search Type list, you might add a UDC for "S - Students."

- You can delete UDCs from a UDC type. For example, if you want to prevent users from choosing a UDC, you can delete it from the UDC type.

You can also change, add, and delete UDC types in the following ways:

- You can change the code type or the description of an existing UDC type, which is useful if you want to customize one of the generic category code lists to meet your needs.

- You can create a new UDC type and add UDCs to it. For example, an educational institution might create a UDC type called "MA - Major Field of Study" to classify its students and define the following UDCs:

  - LA - Liberal Arts

  - MA - Mathematics

  - CS - Computer Science

  - EN - Engineering

  - MD - Medicine

- You can delete a UDC type.

Consequences of Customizing UDCs

Because UDCs can have a significant impact on the integrity of your data, you should customize them only as part of a coordinated plan within your enterprise. When you add or change a UDC, you are affecting the set of values against which OneWorld validates the data entry. However, you are not affecting the actual content of any existing data records. By changing UDCs within a working production environment, you might affect the integrity of your data.

For example, you use Address Book to enter address book records, and you use search types to classify those records. Suppose that you choose a search type of "C - Customers" to classify some of the records that you enter. Later, you decide to change that UDC from "C - Customers" to "P - Patients." Any address book records that you entered with the original UDC value "C" will still contain that value. When Address Book displays these records, you will see an error in the Search Type field because "C" is no longer a valid value.

OneWorld UDC Tables

You use the User Defined Codes program (P0004A) to create and customize UDCs and UDC types. The program stores UDC information in the following tables:

- User Defined Code Types (F0004)

- User Defined Codes (F0005)

Customizing User Defined Codes

Many of the UDCs that you need to use are unique to your enterprise, and your needs are likely to change. Therefore, OneWorld allows you to change, add, and delete UDCs. UDCs allow you to customize OneWorld to meet your needs without having to write complex programs or modify the OneWorld code. When you upgrade OneWorld, your customized UDCs remain.

Changing a User Defined Code

A UDC is made up of two parts. The first part is the code, which consists of the characters that you enter in a field. The second part is the description, which is text that describes what the code means. You can change both the code and the description. For example, the UDC list of search types contains the code "C" which designates "Customers." A medical facility might change this code and description to "P" for "Patients."

► To change a user defined code

From a System Setup menu for your product, choose the appropriate program for changing UDCs.

Alternatively, enter UDC in the Fast Path field.

1. On Work With User Defined Codes, complete the following fields and click Find:

    - Product Code

    - User Defined Codes

      For example, to display the list of Address Book search types, which is UDC 01/ST, type 01 in the Product Code field and ST in the User Defined Codes field.

2. Choose the code that you want to modify and click Select.
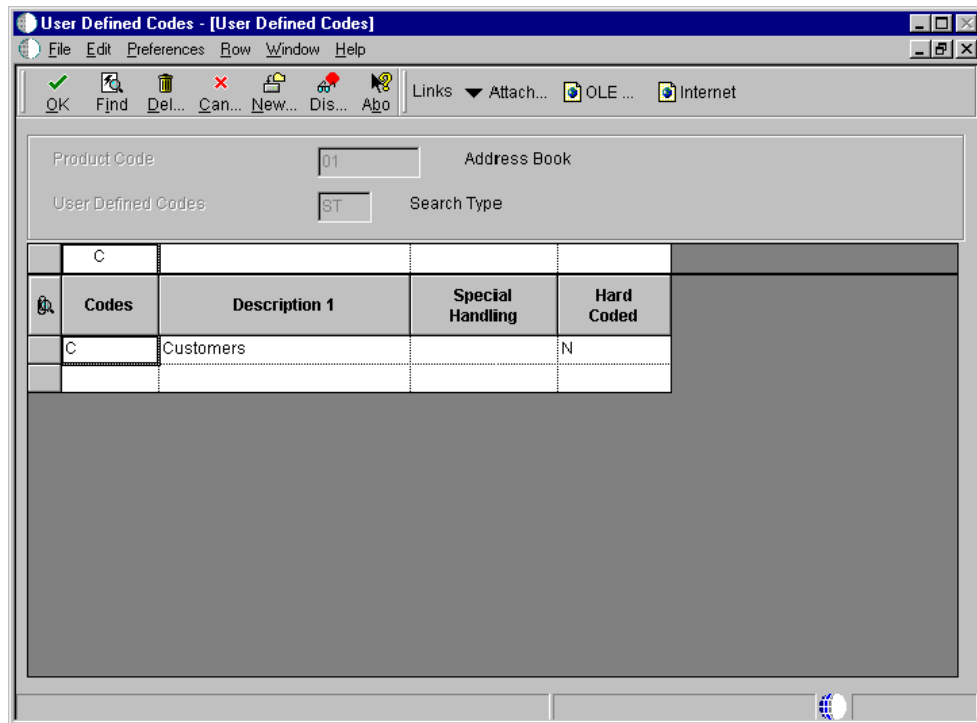
3. On User Defined Codes, change any of the following fields and click OK:

- Codes

- Description 01

- Description 02

- Special Handling

- Hard Coded

Adding a User Defined Code

Add a UDC to a UDC type when none of the existing codes is appropriate for your needs. For example, if you need to identify the entries in the address book that are your business partners, you can add a search type "B - Business Partners" to UDC 01/ST.

Before You Begin

❑ Every UDC belongs to a UDC type. Verify that a UDC type exists where you will add the UDC. To create a new UDC type, see *Adding a User Defined Code Type*.

► **To add a user defined code**

From a System Setup menu for your product, choose the appropriate program for changing UDCs.

Alternatively, enter UDC in the Fast Path field.

1. On Work With User Defined Codes, complete the following fields and click Find:

    *   Product Code

    *   User Defined Codes

    Enter the UDC type into which you want to add the UDC.

2. On Work With User Defined Codes, click Add.

3. On User Defined Codes, scroll to the last empty row of the detail area.

   Caution

   Be sure to add each new code on the *last* detail row, so that you do not inadvertently overwrite a blank code, which might appear in the first detail row. A blank code might have only a period in the Description field.

4. Complete the following fields and click OK:

   - Codes

   To allow a blank as a valid value, leave this field blank.

   - Description 1

   To allow a blank as a valid value, type any character (such as a period) in the last space in this field.

   - Special Handling

   - Hard Coded

Deleting a User Defined Code

You can delete UDCs from a UDC type, but do so with caution. Only delete UDCs as part of a coordinated plan within your enterprise. For example, you might delete the "F - Facilities" UDC from the list of search types if you do not want users to choose that UDC.

If you delete a UDC, the system only deletes the code from the UDC type. UDC values in existing records are not deleted.

Caution

Do not delete hard-coded UDCs because OneWorld applications might depend on them. Hard-coded UDCs have the value "Y" in the Hard Coded field on the Work With User Defined Codes form.

► **To delete a user defined code**

From a System Setup menu for your product, choose the appropriate program for changing UDCs.

Alternatively, enter UDC in the Fast Path field.

1. On Work With User Defined Codes, complete the following fields and click Find:

   - Product Code

   - User Defined Codes

2. On Work With User Defined Codes, in the detail area, choose the UDC that you want to delete and click Delete.

> **Caution**
>
> Ensure that you want to delete this UDC. The only way to replace a deleted UDC is to add it back.

3. Click OK to confirm that you want to delete the UDC.

Customizing User Defined Code Types

A UDC type is the complete set of UDCs that is allowed for a field. A UDC type is made up of a code type, which is its two-character name, and a description. Examples of UDC types are search types and units of measure. UDC types are sometimes referred to as UDC lists.

Each UDC type is associated with a OneWorld product code. You can identify any set of UDCs by its product code and its code type. For example, the Address Book (product code 01) list of search types (code type ST) is referred to as UDC 01/ST.

Changing a User Defined Code Type

You can change the code type and the description of an existing UDC type to meet your needs. Typically, you would change only the description so that it provides a meaningful description of the UDCs within the UDC type. For example, to classify your customers according to how much business they provide, you can change the description for Category Code 01 to Customer Volume. Then, you can customize the individual UDCs within that UDC type to describe the following classifications for your customers:

- H - High-volume customer
- M - Medium-volume customer
- L - Low-volume customer

You can change the code type, but you should do so with caution. If you change a code type, you could invalidate any existing records that use the original code type.

You can also follow this procedure to see a complete list of UDC types for a product code.

► **To change a user defined code type**

From a System Setup menu for your product, choose the appropriate program for changing UDCs.

Alternatively, enter UDC in the Fast Path field.

1. On Work With User Defined Codes, choose Code Types from the Form menu.
2. On Work With User Defined Code Types, complete the following field and click Find:

- Product Code

The system displays the UDC types that already exist for that product code.
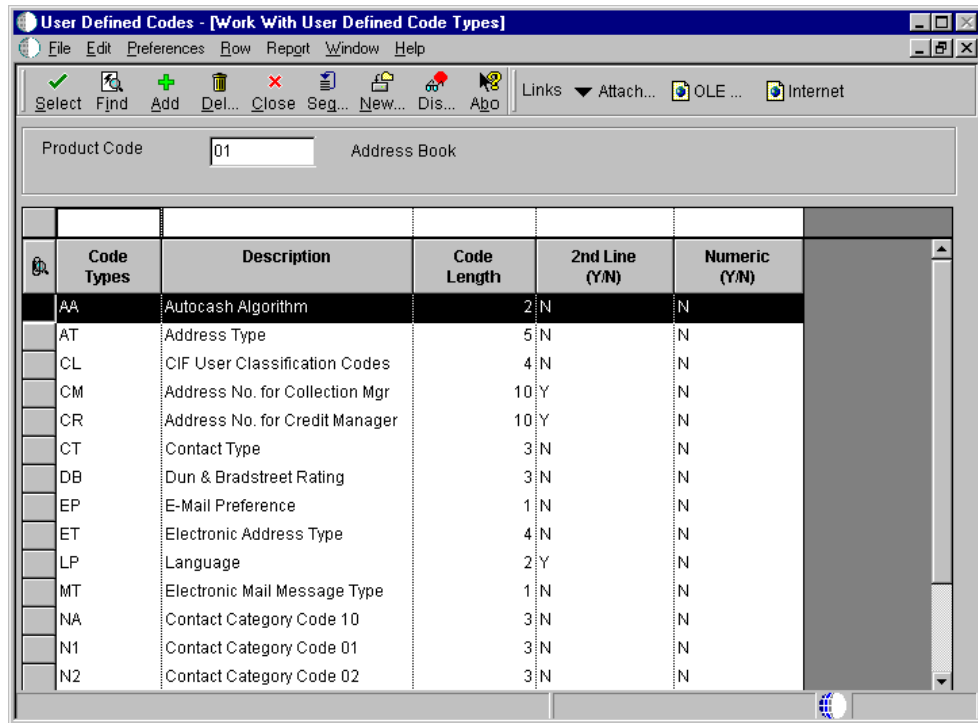
3. Choose the UDC type that you want to change and click Select.
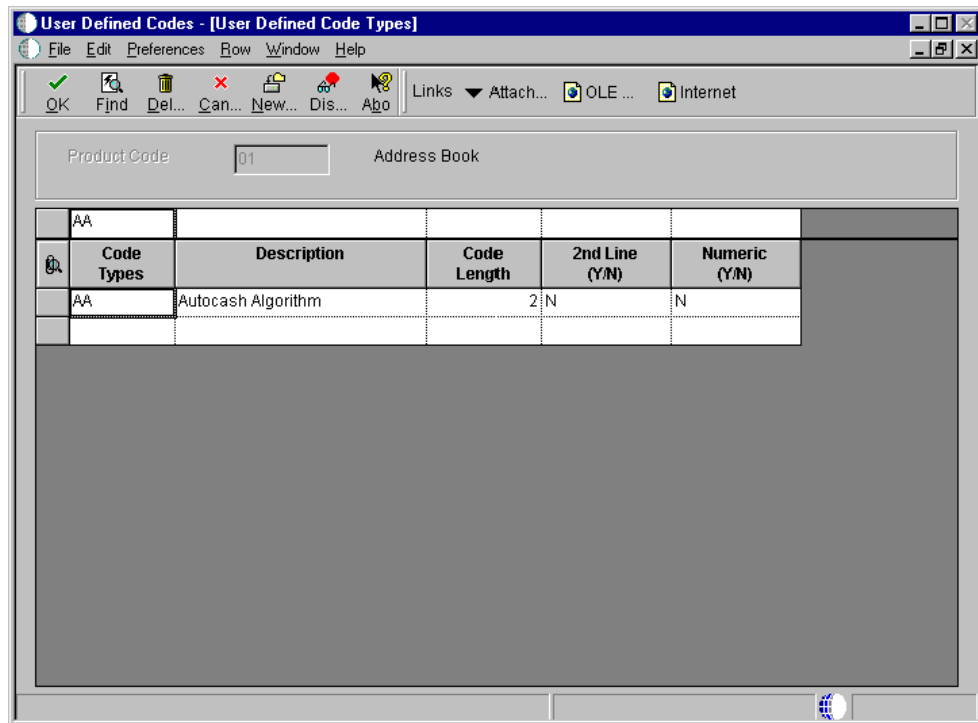
4. On User Defined Code Types, change the values in any of the following fields and click OK:

- Code Types

Caution

J.D. Edwards suggests not changing code types. If you change a code type you could invalidate any existing records that use the original code type.

- Description

- Code Length

- 2nd Line (Y/N)

- Numeric (Y/N)

Adding a User Defined Code Type

Add a UDC type when you need to categorize your data using UDCs and when none of the existing UDC types is appropriate. For example, an educational institution might add a UDC type called "Major" to categorize its students by their major field of study:

- LA - Liberal Arts
- MA - Mathematics
- CS - Computer Science
- EN - Engineering
- MD - Medicine

When you add a UDC type, you must also modify the OneWorld applications that use the UDC type. See *Creating UDC Edit Controls* in the *OneWorld Development Tools Guide* for more information about associating a UDC type with a field.

Note

Because modifying a OneWorld application might require significant effort, whenever possible, you should change an existing UDC type (such as a category code) instead of adding a new UDC type. See *Changing a User Defined Code Type*.

► **To add a user defined code type**

From a System Setup menu for your product, choose the appropriate program for changing UDCs.

Alternatively, enter UDC in the Fast Path field.

1. On Work With User Defined Codes, choose Code Types from the Form menu.

2. On Work With User Defined Code Types, complete the following field and click Find:

- Product Code

3. Click Add.
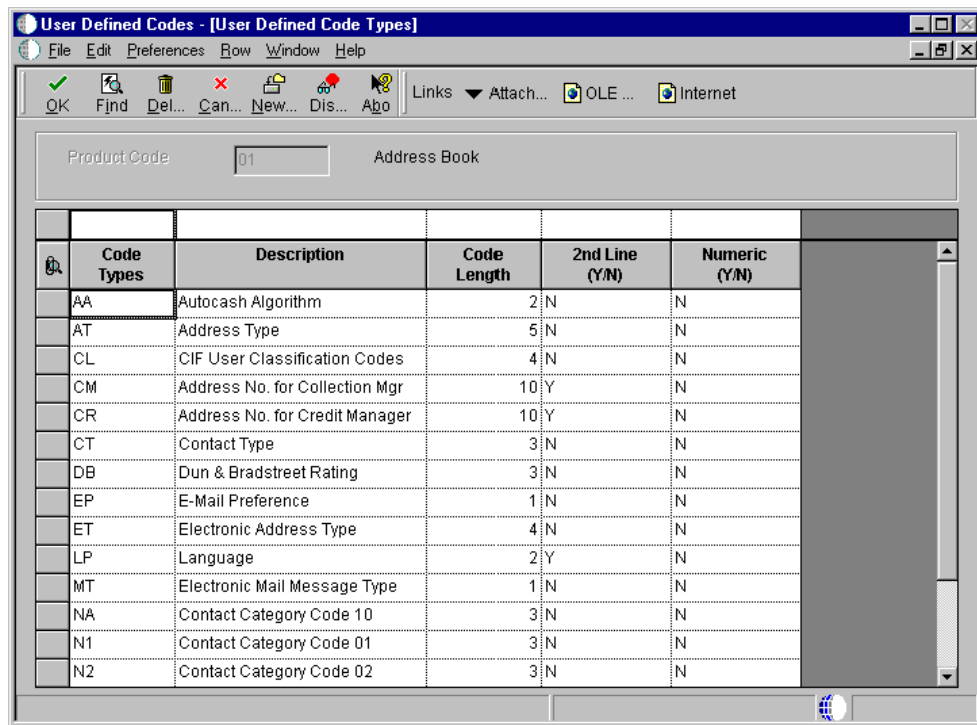
4. On User Defined Code Types, scroll to the last empty row of the detail area.

5. Complete the following fields and click OK:

   - Code Types

   - Description

   - Code Length

   - 2nd Line (Y/N)

   - Numeric (Y/N)

Deleting a User Defined Code Type

You can delete a UDC type, but you should do so with caution. OneWorld applications and the integrity of the data within your database might depend on the existence of UDCs and UDC types. Only delete UDC types as part of a coordinated plan within your enterprise.

Caution

Do not delete UDC types that contain hard-coded UDCs because OneWorld applications might depend on them. Hard-coded UDCs have the value Y in the Hard Coded field on the Work With User Defined Codes form.

Before You Begin

❑ Delete all individual UDCs from the UDC type. For information about deleting UDCs, see *Deleting a User Defined Code.*

▶ **To delete a user define code type**

From a System Setup menu for your product, choose the appropriate program for changing UDCs.

Alternatively, enter UDC in the Fast Path field.

1. On Work With User Defined Codes, choose Code Types from the Form menu.

2. On Work With User Defined Code Types, complete the following field and click Find:

- Product Code

3. On Work With User Defined Code Types, choose the code type that you want to delete and click Delete.

Caution

Ensure that you want to delete this code type. The only way to replace a deleted UDC type is to re-add it.

4. Click OK to confirm that you want to delete the code type.

Translating User Defined Codes into Alternate Languages

Multinational enterprises can translate the descriptions for both UDCs and UDC types into alternate languages. OneWorld displays the descriptions in the language designated by the user's language preference. For example, you can provide a translated description for the following UDC:

- Code: E

- English Description: Employees

- Spanish Description: Empleados

In this way users can choose the same UDCs, regardless of their language preference.

The User Defined Code Alternate Descriptions program (P0004D) stores the translated descriptions in the following tables:

- User Defined Codes - Alternate Language Descriptions (F0004D)

- User Defined Codes - Alternate Language Descriptions (F0005D)

► To translate UDC type descriptions into alternate languages

From a System Setup menu for your product, choose the appropriate program for changing UDCs.

Alternatively, enter UDC in the Fast Path field.

1. On Work With User Defined Codes, choose Code Types from the Form menu.

2. On Work With User Defined Code Types, complete the following field and click Find:

   - Product Code

3. Choose the UDC type that you want to translate and then choose Language from the Row menu.
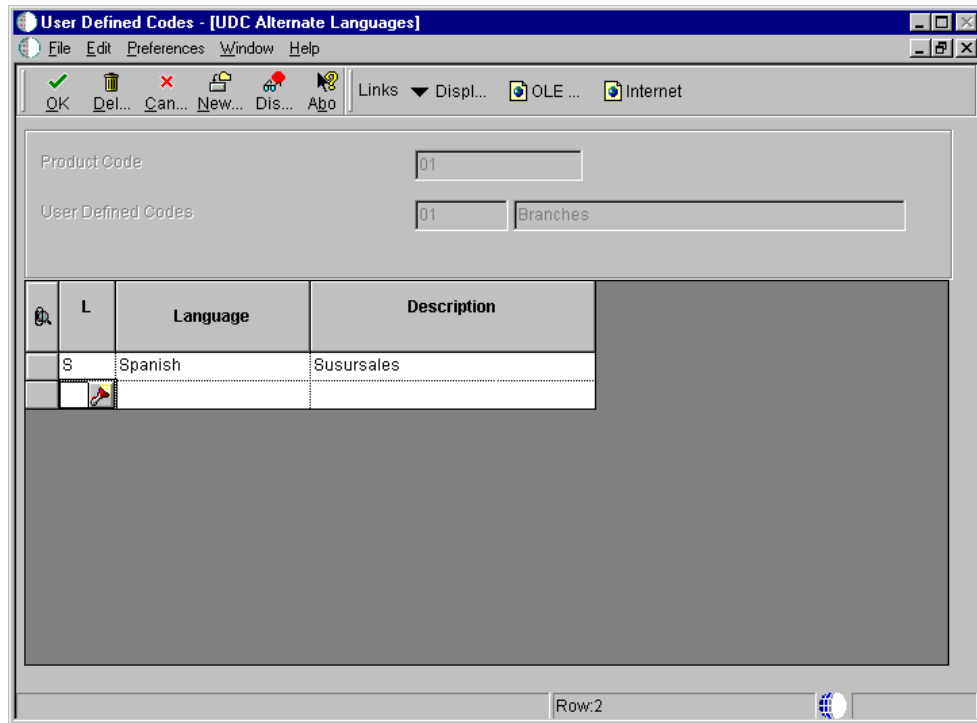
4. On UDC Alternate Languages, enter information in a blank row for the following fields and click OK:

- L

- Description

  Type the translated description into this field.

► **To translate UDC descriptions into alternate languages**

From a System Setup menu for your product, choose the appropriate program for changing UDCs.

Alternatively, enter UDC in the Fast Path field.

1. On Work With User Defined Codes, complete the following fields and click Find:

- Product Code

- User Defined Codes

2. Choose the code that you want to translate and then choose Language from the Row menu.

3. On UDC Value Alternate Descriptions, enter information in a blank row for the following fields and click OK:

- L

- Description

  Type the translated description into this field.

Configurable Network Computing Foundation

Configurable Network Computing (CNC) is the technical architecture for J.D. Edwards software. CNC allows highly configurable, distributed applications to run on a variety of platforms without users or analysts needing to know which platforms or which databases are involved in any given task. CNC insulates the business solution from the underlying technology. Enterprises can grow and adopt new technologies without rewriting applications.

J.D. Edwards software comprises the following components:

Design Tools	J.D. Edwards software provides a unified set of tools to create all interactive applications, batch applications, and reports.
Applications	J.D. Edwards software provides the interactive and batch applications that perform your business needs. For example, Purchase Order Entry and General Ledger Post are applications.
J.D. Edwards Software Foundation Code	J.D. Edwards software provides underlying core processing that both interactive and batch applications depend on in order to run.
J.D. Edwards Software Middleware	J.D. Edwards software provides middleware that insulates your applications from the underlying database, operating system, hardware, messaging systems, and telecommunications protocols. Middleware insulates your business solution from the platform technology.

For detailed information about Configurable Network Computing, see the following documentation:

- *Configurable Network Computing Implementation*
- *Package Management*
- *System Administration*
- *Server and Workstation Administration*

Advantages and Recommendations for CNC

The OneWorld Configurable Network Computing architecture provides the following advantages:

- ❑ Network-centric software
- ❑ Flexible, leveraged technology
- ❑ Worldwide business support
- ❑ Custom solutions without consequences
- ❑ Recommendations for Configurable Network Computing

Network-centric Software

Network-centric software allows you to create a uniform interface that supports a multiplatform network. This compatibility across platforms provides:

- Immediate availability of enhancements to all supported applications. Changes to the following items are reflected in applications across the network:

  - Business objects

  - Business rules

  - Modes of processing

  - Hardware and database

- OneWorld platform-neutral business specifications, or middleware, that comprise a common set of Application Program Interfaces (APIs) that integrate multivendor, multiprotocol differences. This integration insulates developers from the need to program to a specific platform.

- Support for Internet technology, such as a browser interface.

Flexible, Leveraged Technology

You create your applications using tools that do not require a designer to master a programming language. OneWorld tools conceal the code and allow the designer to concentrate on creating applications that are specific to current business needs and accommodate changes to business rules without reprogramming the application source code.

OneWorld is object-based and event-driven to provide you with more efficient business processes. Developers can reuse objects between applications for different purposes. This reusability provides consistency throughout all OneWorld applications.

OneWorld does not rely on one command or keystroke to process information but, rather, processes information at strategic moments during the use of an application. For example, when a user moves between fields on any given form, the system processes the information at the moment when the cursor leaves the field. OneWorld immediately notes any errors and hides processing, such as an update of files that might also store information for the field, when the user moves to the next field on a form.

In addition, OneWorld provides a common interface between applications. When you move from form to form, you see the same general setup.

Worldwide Business Support

OneWorld provides support for mixed currency and languages. Also, you can run OneWorld on platforms from servers to laptops. This scalability allows a travelling consultant to interface with OneWorld and enter records. The consultant can then send these updated records over the Internet to keep files as current as possible.

If you already use WorldSoftware, you do not need to completely change your system to OneWorld. WorldSoftware and OneWorld can coexist by accessing the same database and supporting the same business task. Your business can continue its practices without conforming to a single technological direction. You preserve your existing investment in technology and do not affect end-user productivity while you explore new business solutions.

Custom Solutions without Consequences

You can make custom solutions to business applications with little or no consequences when you upgrade to a new release of OneWorld. In other words, the OneWorld toolset acts as an "idea-enabler" by allowing you to transform a concept into a viable business solution. You maintain consistency across your enterprise, retain flexibility to adapt to changing business requirements, and minimize the time required to implement upgrades. The following list

provides examples of areas in OneWorld that you can customize without consequences during an upgrade:

- Vocabulary overrides
- User overrides
- Versions
- Processing options
- Code generator options

Recommendations for Configurable Network Computing

Distributed processing involves the configuration of executable application components in various modes of operations and the configuration of data tables that the application components require.

With OneWorld, you can dynamically configure application components and data tables. This process allows you the most flexibility during the configuration of your enterprise.

The key to achieving a high level of performance and seemingly boundless scalability is OneWorld's dynamic configuration of both hardware and software. However, the extensive amount of flexibility and options can sometimes appear contradictory and confusing. Consider the following guidelines for Configurable Network Computing:

Fewer is Better	A thirty-computer network is much more difficult to manage than a single computer. Although it might be necessary at times to add computers to your network, try to use the fewest number necessary.
Homogeneity	A homogeneous network is preferred to a heterogeneous network. Try to have all of one type of server hardware, one server operating system, and one workstation operating system. OneWorld supports a heterogeneous network, but avoid heterogeneity unless it is absolutely necessary. However as time passes, a mixed hardware and operating environment is almost unavoidable, and OneWorld and CNC support it.
Batch Processing Has Some Advantages	In general, batch processing is more computer efficient than interactive or real-time processing. For example, electronic commerce or electronic data interchange (EDI) is a superb way to process transactions and keep life simple. Store-and-forward processing is another form of batch processing. It offers most of the advantages of real-time editing and allows quick response time at workstations.
Data Warehousing	Off-loading most reports to a secondary computer or computers offers the following benefits: • Relieves the processing burden from the main server and protects the response time of the interactive users • Offers the full power of the computer to the report writer function, which provides faster processing • Allows you to restructure and simplify data for ease of use • Allows you to supplement or enhance data with exterior database information • Allows you to analyze data with modern tools such as online analytical processors (OLAP) Fifty to seventy percent of computer processing cycles are used for reporting and data analysis. Off-loading this processing to a separate data warehouse provides

a substantial opportunity to ensure satisfactory performance for both the interactive and batch users.

Processing Mode

You should use real-time processing for low volume data entry only. Use store-and-forward processing for high volume data entry. You can use the batch-of-one concept (asynchronous processing) as a compromise between real-time and store-and-forward processing.

You can perform data-entry functions, such as accounts payable vouchers, payroll time sheets, employee expense reports, and cash receipts, in a store-and-forward mode rather than a real-time mode to minimize the impact on the main server computer.

Multitiered Networks

Third-party database management systems consume a great deal of computer resources. Separating the J.D. Edwards applications and all their business objects onto a separate computer helps ease the burden on a computer. Splitting these two functions on two different computers allows optimum computing power for both needs. This implies a three-tier network. For example, such a network might consist of hundreds of workstations that direct into dozens of application servers that direct into a few database servers. The data warehouse acting on top of this would create yet a fourth tier. These techniques of multitiered distribution of work, while complex, offer considerable opportunity to improve performance and increase scalability.

Multiple Servers By Vertical

OneWorld can work concurrently with mixed databases across multiple machines. You can access business objects and data from several databases including Microsoft Access, Oracle 7 Server, Microsoft SQL Server, and the IBM DB2/400. You can spread this data over several computers. For example, you can have separate servers for manufacturing and logistics, accounts receivable, and the general ledger and financial applications. You do not need a single central server. The concept of multiple servers working in harmony is central to the concept of CNC.

Data Replication

J.D. Edwards offers several facilities for data replication. These facilities include:

- OneWorld application for data replication
- Just-in-time replication
- Batch application
- Copy table script

In addition, OneWorld can cooperate with several open systems tools that support the publishing and replication of data. Although some circumstances might arise when you need to perform data replication, such as store-and-forward processing, you should generally discourage the activity due to the difficulty in coordinating the replication successfully.

Departmental and Application Work Groups

Data replication is simpler when you use fewer computers. For this reason, it is often preferable to replicate data to an application server in a single group that performs the same business functions, such as credit and collections, accounts payable, sales order processing, and so on. In a departmental work group, workstations would have no replicated data. The business objects alone would be replicated and maintained on the departmental application server. This setup minimizes the data transfer between the workstation and the application server, thus decreasing the amount of data replication. This configuration represents a classic three-tier architecture.

Heavy or Light Workstation Processing

You can configure either a heavy or a light workstation, depending on your configuration of business objects, data, and mode of operation. The decision is entirely up to you.

Configurable Network Computing Fundamentals

Object Storage

OneWorld provides two general storage formats, central objects and replicated objects, to accommodate several functions in OneWorld.

Central Objects

Store objects in a central location to allow for the following:

- Deployment
- Redeployment
- Development

Central objects consist of object specifications for each OneWorld object and C components for code-generated objects. Store your central object specifications in a relational database on either a deployment server or an enterprise server, depending on available resources. Store C components for code-generated objects in directories on the deployment server.

To deploy objects out to the enterprise, you define a package that OneWorld creates from central objects. Each package contains a copy of the central objects. This copy consists of object specifications, and linked and compiled C components. OneWorld converts the copied object specifications to a format for storage in a directory. Workstations and enterprise logic servers receive packages and store them in local directories.

Replicated Objects

Create replicated objects from central objects. Store a set of replicated objects in a directory on each workstation, enterprise logic server, or both. At runtime, OneWorld requires the specifications of the object that the workstation or enterprise logic server processes. For example, to execute the Address Book application on a workstation, the workstation needs the object specifications and the compiled dynamic link library for the Address Book application and for any object that the application uses, such as data dictionary items, tables, and business views. You must store a set of objects describing the physical table in a directory on your workstation or enterprise logic server to run an application because the physical table that contains the actual data exists in a database on another platform.

On a OneWorld workstation or enterprise logic server, you can store one set of replicated objects for each set of central objects. For example, your enterprise might use separate sets of central objects for a development environment and a production environment. A separate development environment provides easy distribution of custom modifications and maintains the integrity of objects in use by other environments within your enterprise.

The following illustration provides an example of the relationship between central objects and replicated objects:
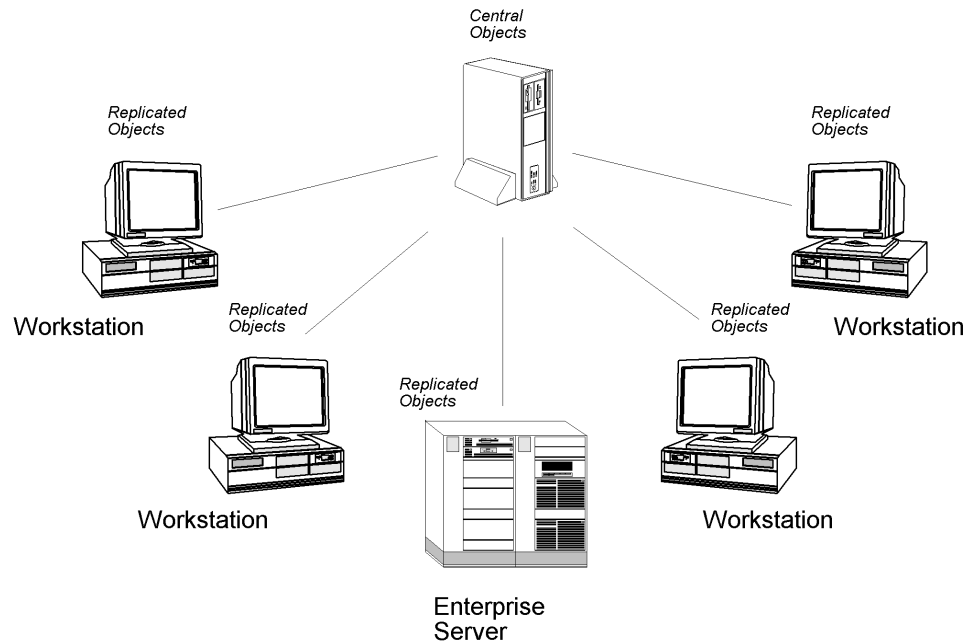
Environments

A OneWorld environment is a collection of pointers indicating the location of data and J.D. Edwards software objects. An environment answers three simple questions:

- Where is my data?

- What machine will process my logic?

- What directory contains the object being processed?

OneWorld answers these questions easily, providing an environment as a pointer to data and logic objects. For example, in the Purchase Order application:

Where is my data?	A user clicks on the Find button to locate a Purchase Order. The environment determines in which database the table resides.
What machine will process my logic?	When finished entering an order, the user clicks OK. The environment determines where the logic (a master business function) necessary to record the transaction will process and where the transaction tables reside to enter the order.
What directory contains my objects?	After entering a user ID and password, a user must choose the environment to sign on to. If you have multiple sets of objects, selecting the environment determines which objects that OneWorld executes (the directory in which they reside). This location is called a path code, and OneWorld defines it in the Object Path Master.

Path Codes

A path code can refer to the central development objects on the deployment server, or to replicated objects on a workstation or logic server. A path code exists for each unique set of central objects. For example, you might have a set of objects reserved for software updates that you can deploy to users and a set of objects that you reserve for major enhancements.

A set of objects or the path code can reside in the following locations:

Central Server   Contains the central set of development objects specifications. All development occurs in this location. The path code connects the specifications and the C components on the deployment server.

Workstation   Contains a replicated set of objects that OneWorld uses at run time.

Logic Server   Contains a replicated set of objects that OneWorld uses to process logic on these servers.

The Object Path Master (F0094) contains path codes that track a set of objects and their location within OneWorld.

Object Configuration Manager (OCM)

The Object Configuration Manager is a tool that configures distributed processing and distributed data at run time without requiring programming. Using the Object Map table, the Object Configuration Manager points to the correct data, batch process, or business function for a given environment and user. The Object Configuration Manager is the control center for your run-time architecture. OneWorld always uses the Object Configuration Manager to locate the data and platform needed to execute the distributed logic.

The following illustration provides an example of how the Object Configuration Manager connects data and logic for processing:

AS/400
HP 9000
RS/6000
Alpha NT

AS/400
HP 9000
RS/6000
Alpha NT

AS/400
HP 9000
RS/6000
Alpha NT

Object
Configuration
Manager

Workstation
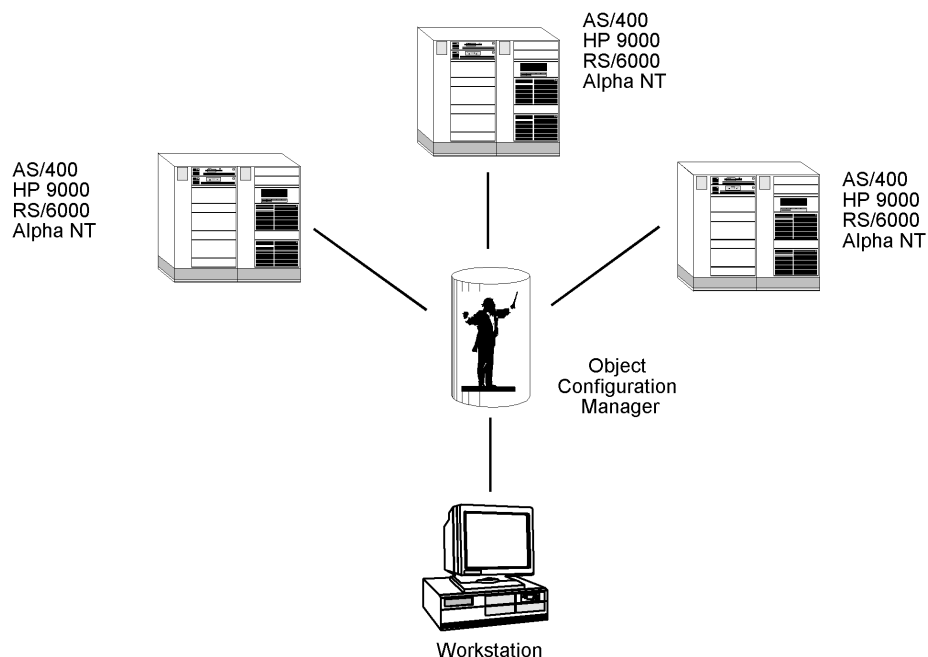
Every environment has an associated set of Object Configuration Manager mappings indicating the distributed data and distributed processing locations for that environment.

The following equation represents the relationship between the Object Configuration Manager, a path code, and an environment:

ENVIRONMENT = PATH CODE + OCM MAPPINGS

The path code answers the following question:

- What directory contains the object being processed?

The OCM mappings answer the following questions:

- What database stores my data?

- Where should the logic object execute?

The following illustration provides an example of how OneWorld uses the relationship between OCM mappings and path codes to create an environment:

ENVIRONMENT

PATH CODE

OCM MAPPINGS

Answers:
"What database stores my data?"
"Where should the logic object execute?"

Answers:
"What directory contains the object to process?"
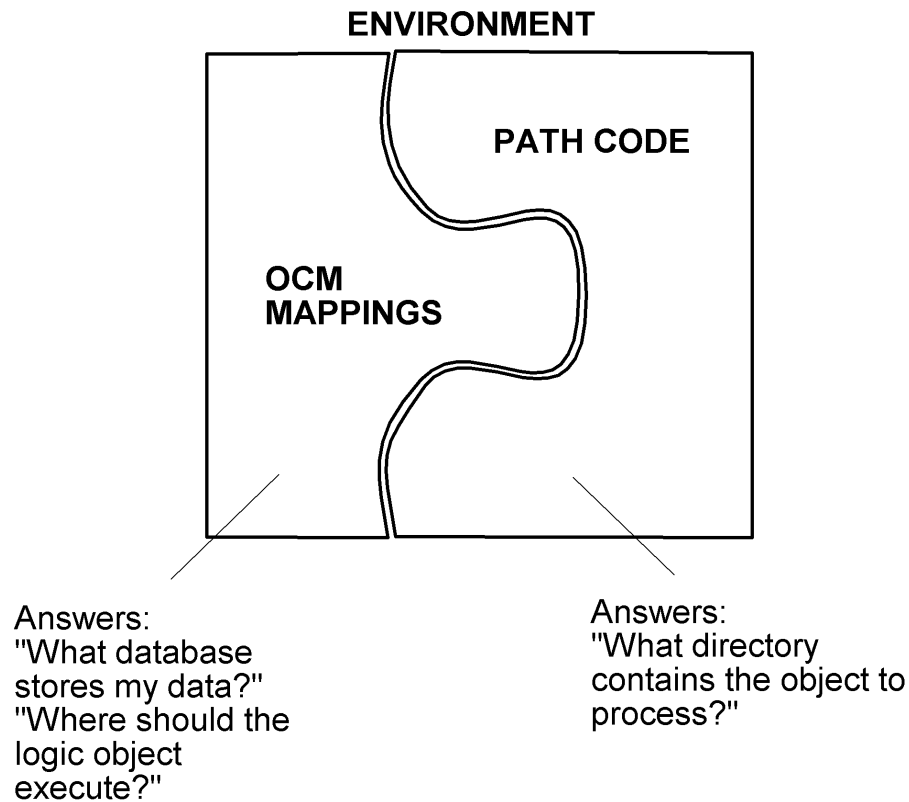
Data Sources

A data source is the specific location of data or distributed processing. OneWorld data sources can be:

- An entire database in a specific location, regardless of the type of database, such as a Microsoft Access database located in a specific directory or a library in DB2/400

- A specific machine in the enterprise that processes logic

The platform and data sources work together. You must define both the server that processes the logic and the databases that store the data. If multiple databases within one database management system (DBMS) reside on a machine, you must define each database to OneWorld.

Do not confuse Microsoft open database connectivity (ODBC) data sources with OneWorld data sources. The ODBC data source defines databases to various third-party communication products such as Client Access, Rumba, SQL Server, and Access. OneWorld data sources define both databases and logic servers to OneWorld.

The following list describes OneWorld data sources that you might use in your configuration:

Oracle DBMS   A OneWorld data source for an Oracle DBMS points to an Oracle Connect String and a Table Owner.

SQL Server DBMS   A OneWorld data source for a SQL Server DBMS points to a SQL Server Database (ODBC data source) and a Table Owner.

DB2/400 DBMS   A OneWorld data source for a DB2/400 DBMS points to a RDB directory entry and a Library (ODBC data source).

Access DBMS   A OneWorld data source for an Access DBMS points to an Access database (ODBC data source).

Object Deployment

Deploy OneWorld to your workstations and servers using any of the following methods:

- Initial installation, for workstations and servers
- Workstation installation, for workstations
- Application installation, for workstations
- Just-in-time installation, for workstations

Initial Installation

The installation process is based on a centralized deployment server model. The deployment server installation program copies OneWorld installation software from the CD-ROM to the deployment server. From the deployment server, you redistribute the software to the enterprise servers and workstations.

OneWorld
Software

Windows NT
Workstation

Deployment
Server

Alpha

Windows 95

Windows NT

HP 9000

AS/400

RS/6000
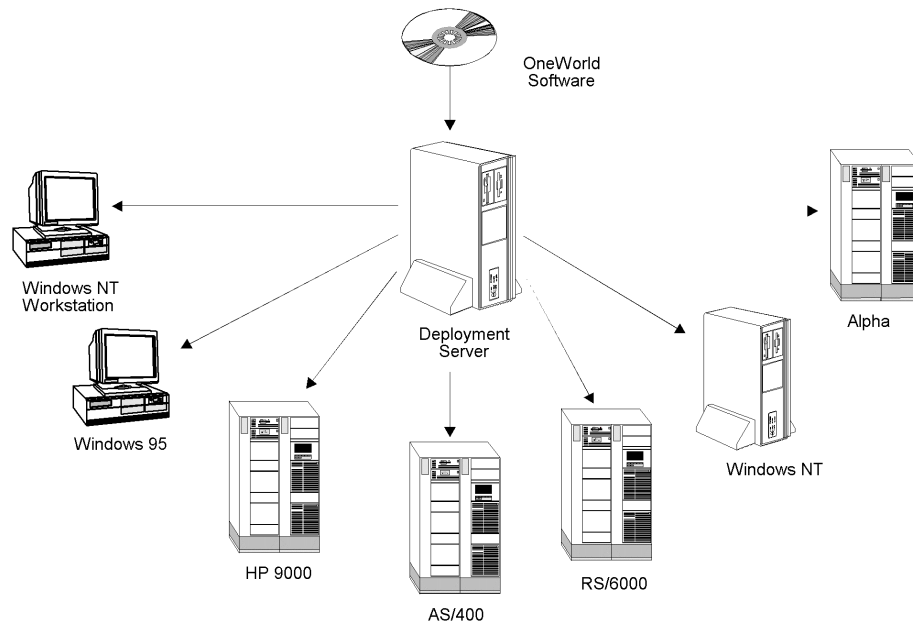
Workstation Installation

The workstation installation program retrieves software from the package that you request. A package contains instructions that describe where to find the necessary components that the workstation installation program deploys to the local computer.

Deployment
Server

Windows NT
Workstation

Windows 95
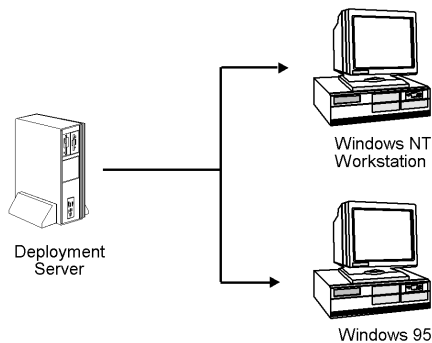
Each package represents a record of your central objects at a point in time. Once you build and test a package, you can safely modify central objects because users will not receive those objects until you build another package and make it available to them. Building a package involves copying the central objects to the package itself. The package then contains replicated objects, which OneWorld can read at run time.

Application Installation

Application installation can be used to quickly deploy changes to an individual application. Advantages of application installation are:

- Users do not have to install a complete set of objects but only those objects that are necessary to capture the changed application.

- You do not need to build a new package and perform a global build before deploying the application change.

- Developers and testers can use application installation to load changes that were recently checked into the central objects onto their machine.

Workstation initiates Application Installation

Work Station

The Deployment Server responds by gathering and delivering all objects necessary to run the application

Deployment Server
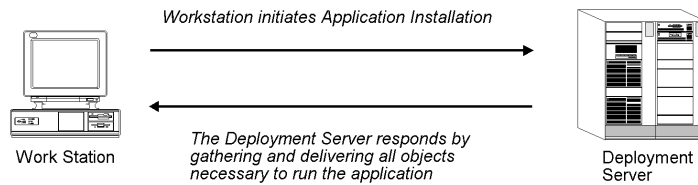
Just-in-Time Installation

Just-in-time installation installs applications to your workstation the first time you use them. For example, when you deploy a custom menu that contains a new application to a workstation, the object automatically installs on the workstation when a user clicks the menu option for the application.

Appendices

Shortcuts

Menu options and buttons throughout the system include key combinations that perform the same functions as using the mouse. All of the standard push buttons in the system have accelerator keys associated with them.

You can recognize accelerator keys by the underline on a control or menu. For example, the "i" on the Find button is underlined. Press Alt + i to use this control.

Selecting Text

Double-click

Highlight one word

⬆ Shift + →
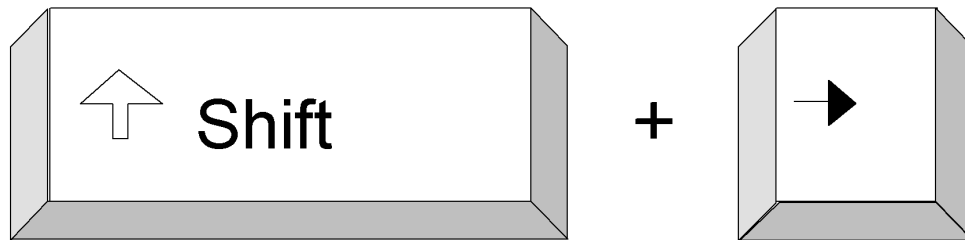
Highlight text one character to the right

⬆ Shift + ←
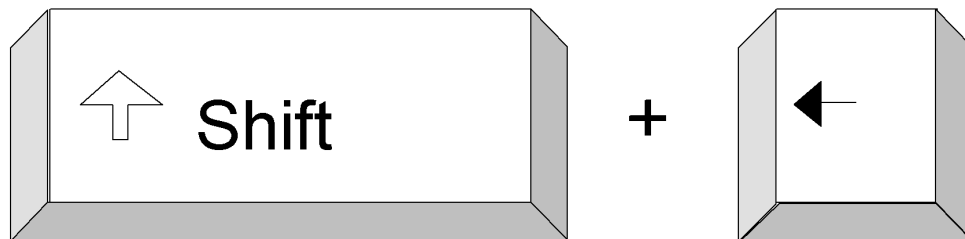
Highlight text one character to the left

⬆ Shift + Ctrl + →
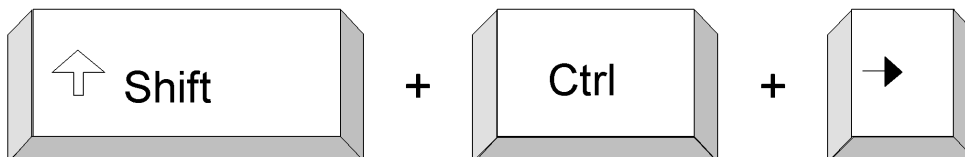
Highlight text to the end of a word

Shift + Ctrl + ←
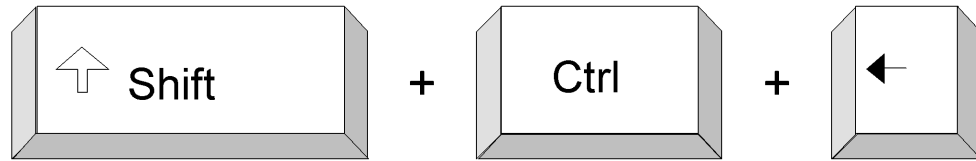
Highlight text to the beginning of a word

Shift + End
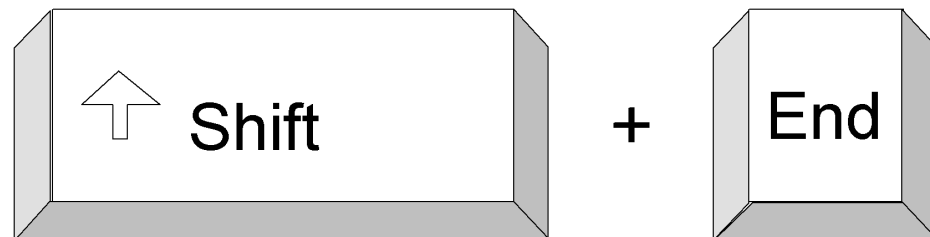
Highlight text to the end of a line

Shift + Home
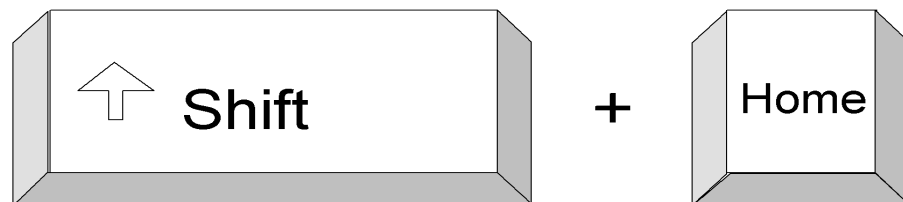
Highlight text to the beginning of a line
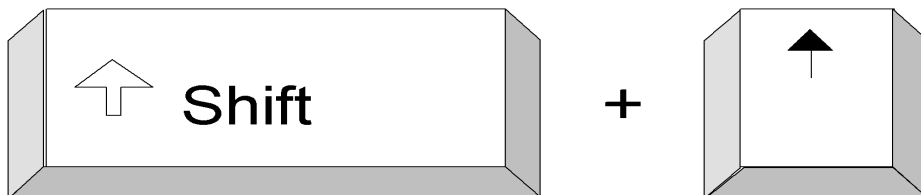
Shift + ↑

Choose multiple lines, one line up
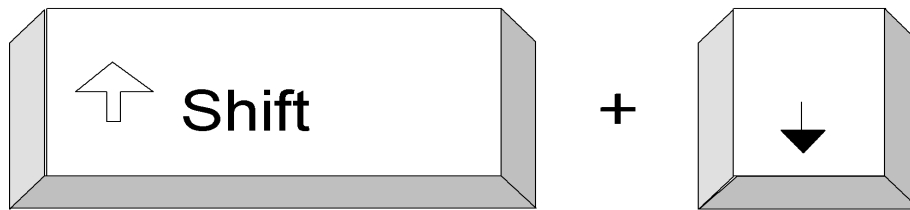
⬆ Shift + ⬇

Choose multiple lines, one line down

⬆ Shift

Shift Click Method (highlight a range of text): Click at the beginning of the text, hold down the SHIFT key, then click at the end of the text

Keyboard Shortcuts

F1

Help

Ctrl + ← Backspace
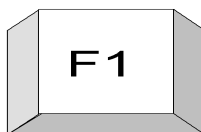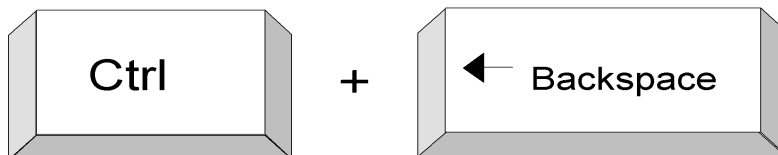
Delete one word to the left of the insertion point

Ctrl + Delete
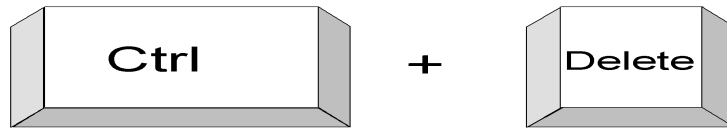
Delete one word to the right of the insertion point

Ctrl + X
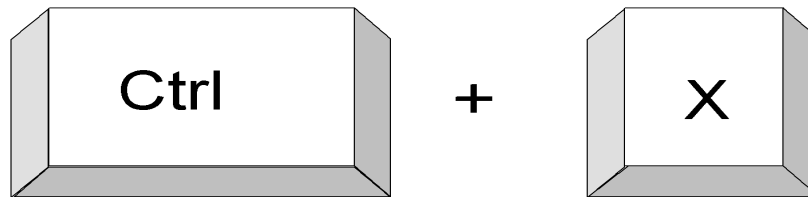
Cut or delete selected text

Ctrl + V
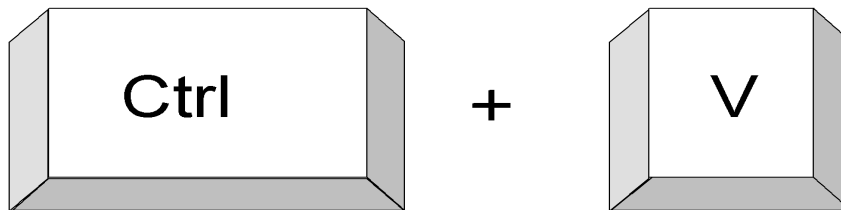
Paste cut or copied text to the new area

Ctrl + Y
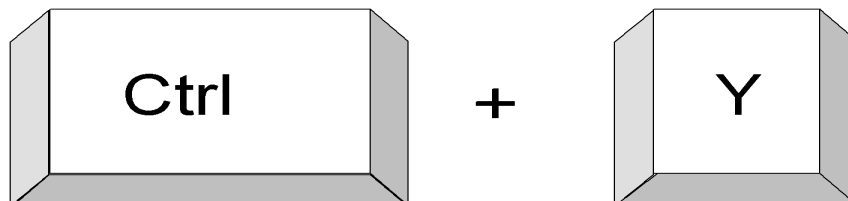
Repeat previous action

Ctrl + C
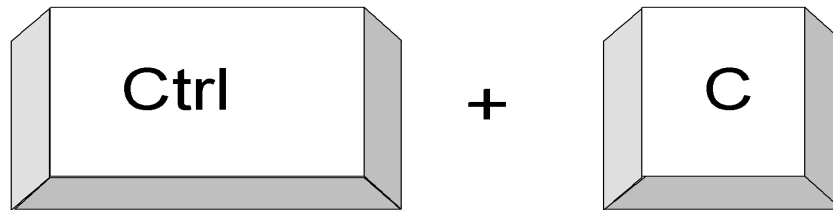
Copy selected text

Ctrl + Z

Undo last action

Ctrl + S
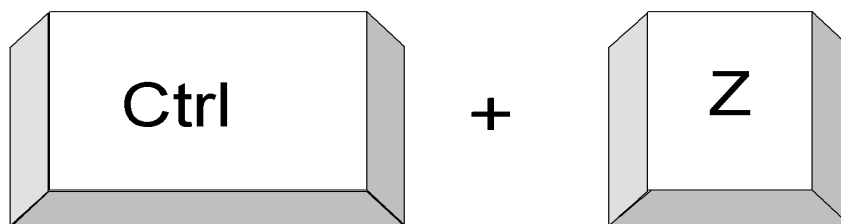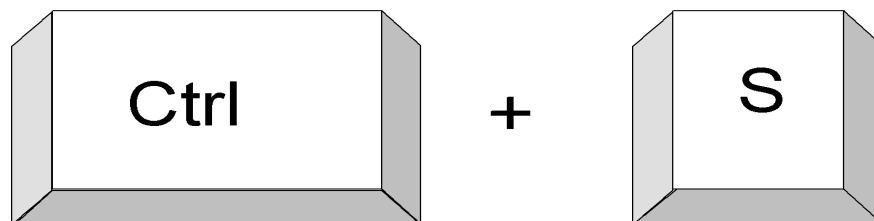
Save work

Moving Around
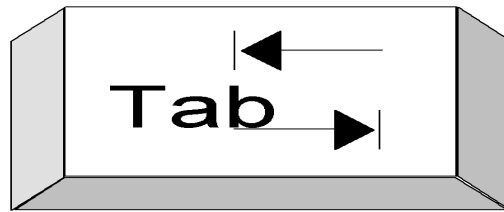
Move to the next field or button

(You must use Ctrl + Tab to move from the Query by Example line to the grid and from the grid to the next field or button.)
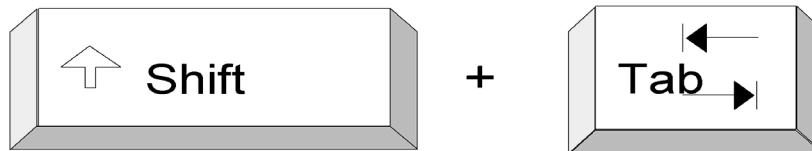
Return to the previous field or button
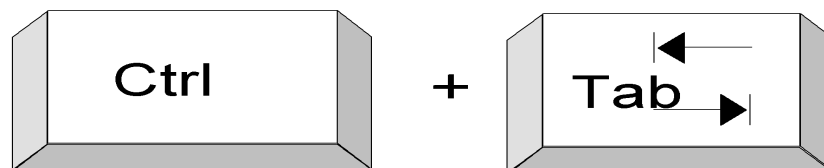
Move from the Query by Example line to the grid and from the grid to the next field or button
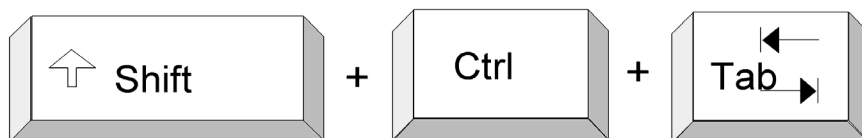
Move backward into the grid or from the grid to the Query by Example line
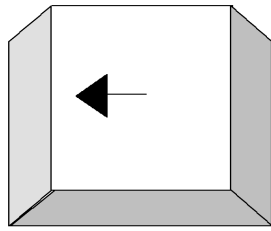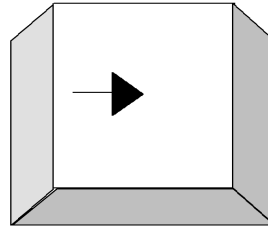
Move the grid display one column to the left or to the right
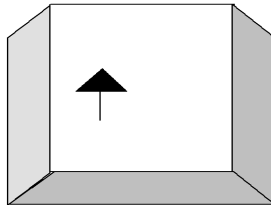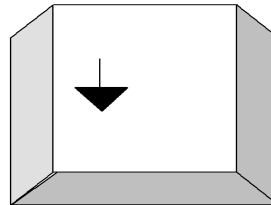
Select the row up or down one row
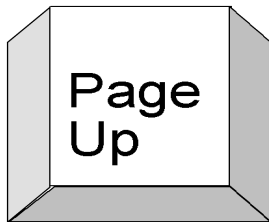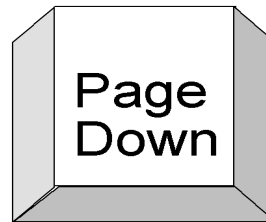
Move up or down one screen
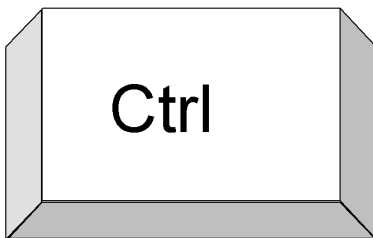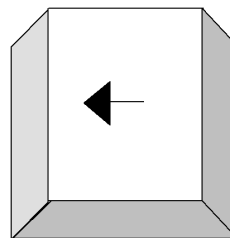
Move one word to the left

```
┌──────────────┐        ┌────────┐
│     Ctrl     │   +    │   →    │
└──────────────┘        └────────┘
```
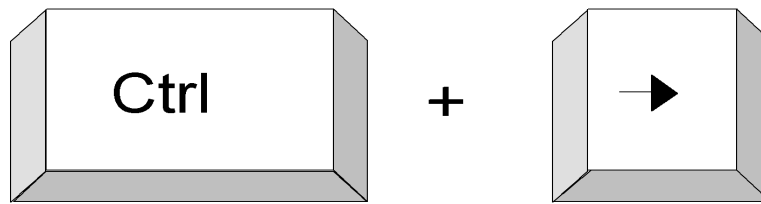
Move one word to the right

Buttons

```
┌──────────────┐        ┌────────┐
│     Alt      │   +    │   A    │
└──────────────┘        └────────┘
```

Add

```
┌──────────────┐        ┌────────┐
│     Alt      │   +    │   C    │
└──────────────┘        └────────┘
```

Or

```
┌──────────────┐        ┌────────┐
│     Alt      │   +    │   F4   │
└──────────────┘        └────────┘
```

Close or Cancel

Alt + D

Delete

Alt + F

Find

Alt + O

OK

Alt + S
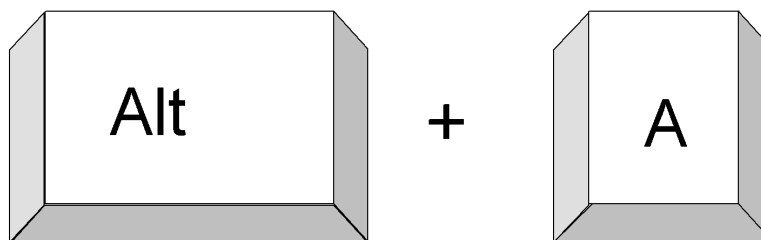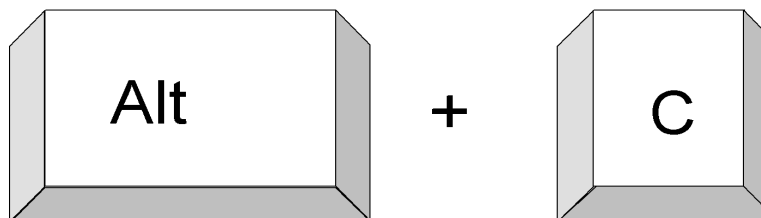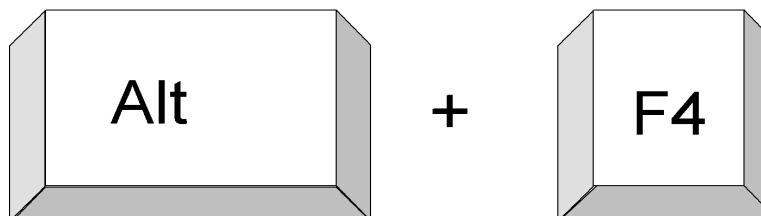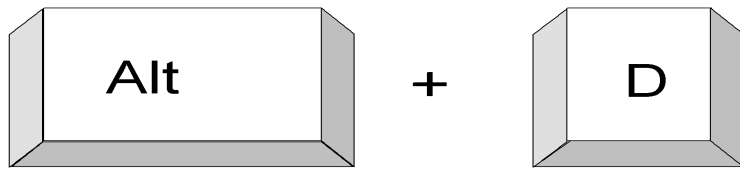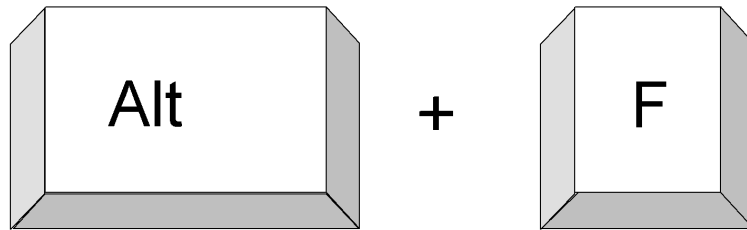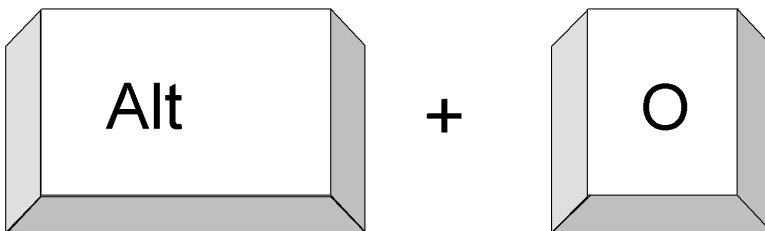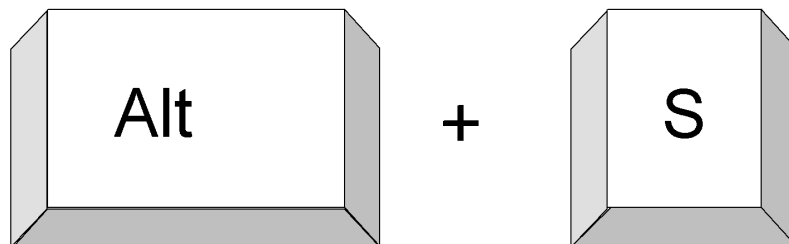
Select

Keyboard Shortcuts for the Calendar Tool

Page
Up

Or

Ctrl + ←
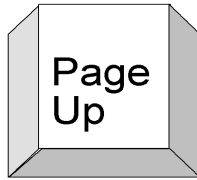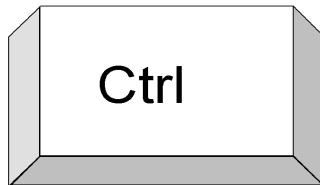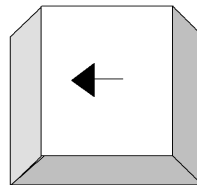
Move to previous month
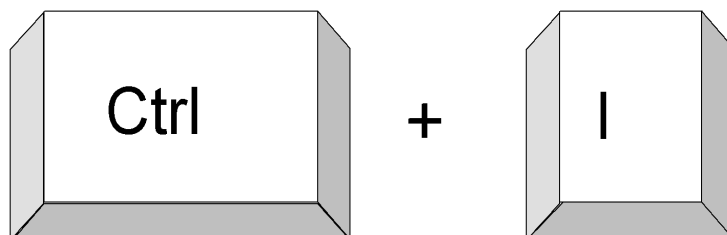
Page
Down

Or

Ctrl + →
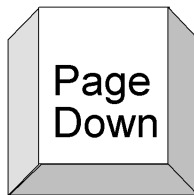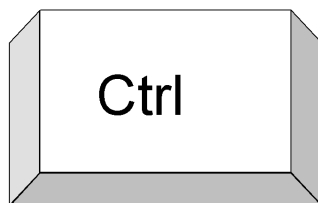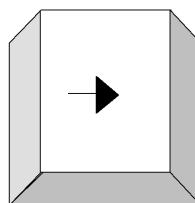
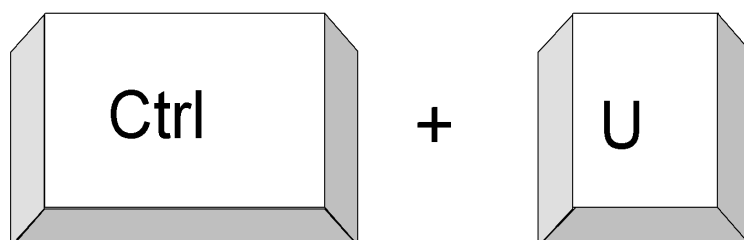Move to next month
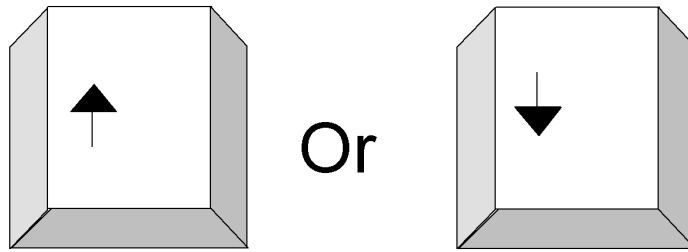
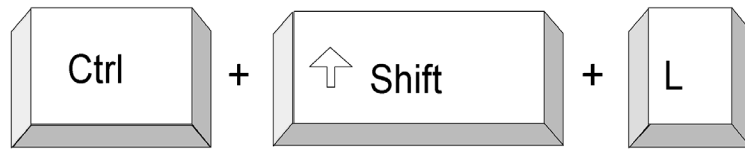Move through weeks

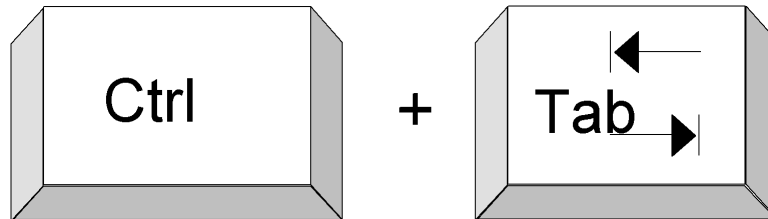## Keyboard Shortcuts for Media Object Text
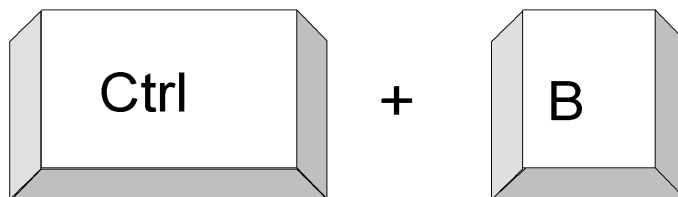
Bolds selected text

Italicizes selected text

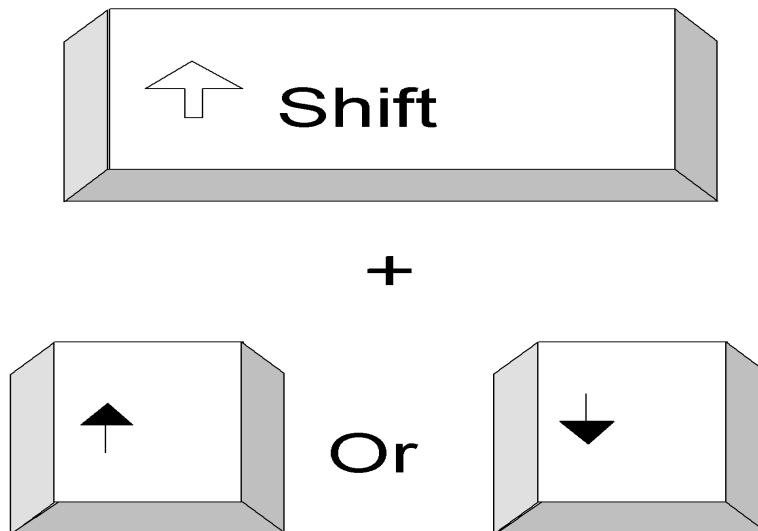Underlines selected text

Ctrl + ⇧ Shift + L

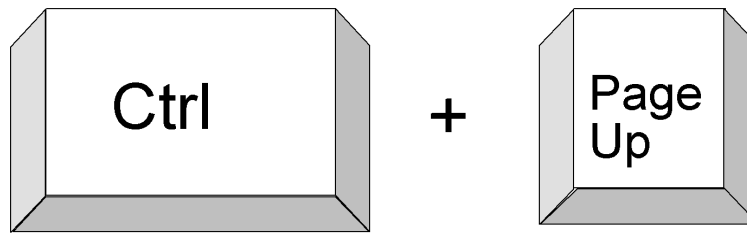Creates a bullet

Ctrl + Tab

Exits the text edit form and displays the next object in the tab sequence
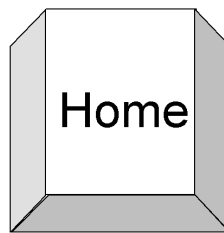
Moving Around in the Grid

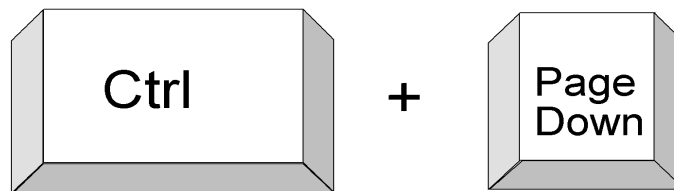The following keyboard commands are available in the grid:

⇧ Shift

+

↑ Or ↓

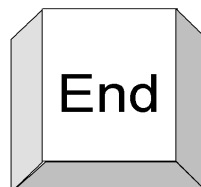Use to select multiple rows. Available only in grids where you cannot enter information.

Ctrl + Page Up

Or

Home

Moves to the first cell in the row. Available in any grid.

Ctrl + Page Down

Or

End

Moves to the last cell in the row. Available in any grid.

Ctrl + Home
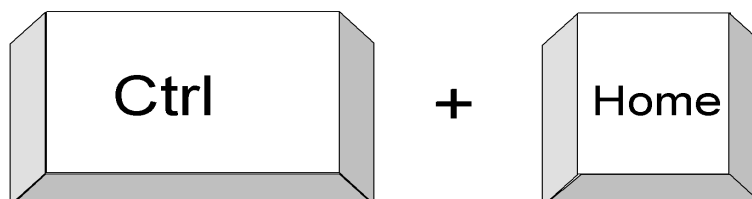
Activates the cell in the first row and column. Available in any grid.
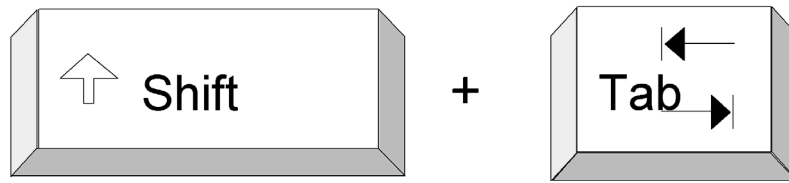
Moves to the previous cell. The order is left and then up. Available only in grids where you can enter information.
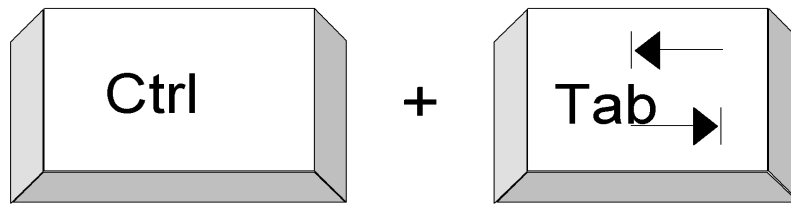
Exit the grid and move to the next control in the form. Available in any grid.
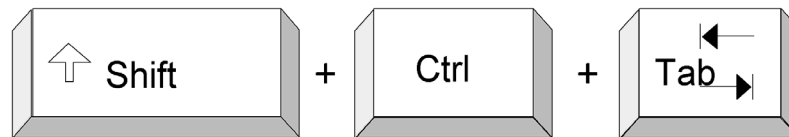
Exit the grid to the previous control in the form, or the query-by-example line if one exists. Available in any grid.
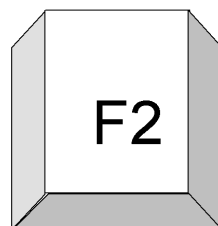
Places the cursor at the end of text in the active cell. Available only in grids where you can enter information.

Ctrl + X
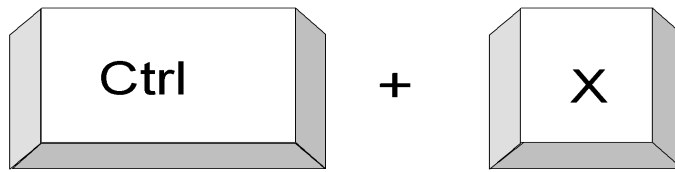
Cuts the current selection or data in a cell to the Clipboard. Available in any grid.

Ctrl + V
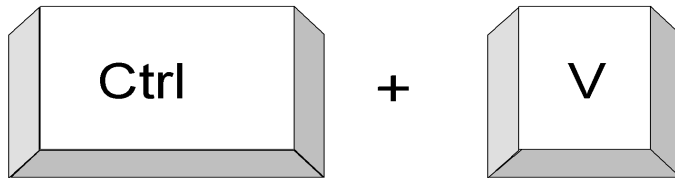
Pastes the Clipboard data into the current cell location. Available in any grid.

Ctrl + C
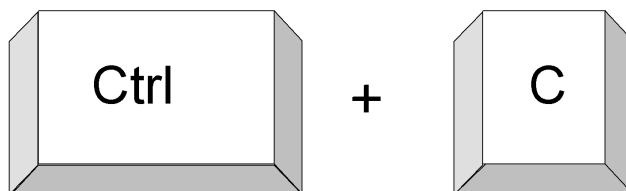
Copies the current selection or data in a cell to the Clipboard. Available in any grid.

Esc
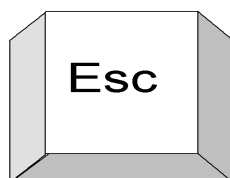
Turns edit mode off (the value of the previous cell replaces any changes that you made). Available only in grids where you can enter information.

⇧ Shift

\+

[Space Bar]

Selects the current row. Available only in grids where you can enter information.

J.D. Edwards Software Systems

The following table lists the J.D. Edwards systems:

Number	System
00	Foundation Environment
01	Address Book
02	Electronic Mail
03	Accounts Receivable
0301	Credit Management
03B	Enhanced Accounts Receivable
03C	Issue Management System
04	Accounts Payable
05	Time Accounting and HRM Base
05A	OW HR & PR Foundation
05C	OW HR & PR Foundation Canadian
05T	Time Entry
05U	OW HR & PR Foundation US
06	Do not use
07	Payroll
07S	Payroll SUI
07Y	U.S. Payroll Year End
08	Human Resources
08B	Benefits Administration
08C	OW HR Canadian
08H	Health and Safety
08P	Position Control
08R	Recruitment Management
08U	OW HR US

08W	Wage and Salary
09	General Accounting
09E	Expense Reimbursement
10	Financial Reporting
10C	Multisite Consolidations
11	Multicurrency
11C	Cash Basis
12	Fixed Assets
13	Plant/Equipment Management
14	Modeling, Planning & Budgeting
15	Property Management
16	Profit Management (EPS)
17	Customer Service Management
17C	Call Management
18	Resource Scheduling
19	Utility CIS
30	Product Data Management
3010	Process Data Management
31	Shop Floor Control
3110	Process Control
32	Configuration Management
32C	Custom Works
33	Capacity Planning
34	Requirements Planning
34A	Advanced Planning & Scheduling
35	Enterprise Facility Planning
36	Forecasting
37	Quality Management

38	Agreement Management
39	Advanced Stock Valuation
40	Inventory/OP Base
4010	Advanced Price Adjustments
41	Inventory Management
41B	Bulk Stock Management
42	Sales Management
42A	Sales Force Automation
42E	ECS Sales Management
43	Procurement
44	Subcontract Management
4401	Homebuilder Management
44H	Homebuilder Management
45	Advanced Pricing
46	Warehouse Management
47	Electronic Commerce
48	Work Order Processing
48S	Service Billing
49	Transportation Management
50	Job Cost Base
51	Job Costing
52	Contract Billing
53	Change Management
55 - 59	Reserved for Clients
60 - 69	Reserved for JDE Custom
70	Multinational Products
71	Client Server Applications
72	World Vision

73	M & D Complementary Products
74	EMEA Localization
74H	Hungary
74I	Ireland
74L	Portugal
74N	Nordics
74P	Poland
74R	CIS
74S	Spain
74T	Turkey
74Z	Czech Republic
75	ASEAN Localization
75H	Thailand
75I	India
75K	Korea
75T	Taiwan
76	Latin American Localization
76A	Argentina
76B	Brazil Localization
76C	Colombia
76H	Chile
76P	Peru
76V	Venezuela
77	Payroll (Canadian)
77Y	Canada Payroll Year End
79	Translation Tools
80	Business Intelligence
81	DREAM Writer

82	World Writer
83	Management Reporting - FASTR
84	Distributive Data Processing
85	Custom Programming
86	Electronic Doc. Interchange
87	JDE Internal
88	Cautious Purge System
89	Conversion Programs
91	Documentation
92	Computer Assisted Design
93	Computer Assisted Programming
94	Security Officer
95	Sleeper-now in system 96
96	Computer Operations
97	Software Installation
98	Technical Tools
98E	Electronic Burst and Bind
98FT	Form Type
98SA	Sample Application
99	Technical Tools - Internal
99D	Technical Tools - DASD Sizer
99M	Technical Tools-Masters/Update
B	LANGUAGE TRANSLATIONS
B1A	Chinese - Simple
B1B	Chinese - Complex
B1E	English
B1F	French
B1G	German

B1I	Italian
B1J	Japanese
B1P	Portuguese
B1S	Spanish
B2A	Dutch
B2D	Danish
B2F	Finnish
B2N	Norwegian
B2S	Swedish
B3C	Czech
B3H	Hebrew
B3R	Russian
BC1	Chinese - Simple
BC2	Chinese - Complex
BCR	Czech
BDN	Danish
BDU	Dutch
BFI	Finnish
BFR	French
BGR	German
BHE	Hebrew
BIT	Italian
BJP	Japanese
BNO	Norwegian
BPO	Portuguese
BRU	Russian
BSP	Spanish
BSW	Swedish

D3N	dcLINK (data collection)
H01	Address Book (inc. ALL Mail)
H03	Accounts Receivable
H03B	New Accounts Receivable
H04	Accounts Payable
H05	Standalone Time Accounting
H07	Payroll
H08	Human Resources
H09	General Accounting
H12	Fixed Assets
H13	Equipment/Plant Management
H15	Commercial Property Management
H30	Product Data Management
H301	Process Data Management
H31	Shop Floor Control
H311	Process Control
H32	Configuration Management
H33	Capacity Requirements Planning
H34	DRP/MRP/MPS
H35	Enterprise Facility Planning
H36	Advanced Forecasting
H40	Inventory/OP Base
H41	Inventory Management
H415	Bulk Inventory Management
H42	Sales Order Processing
H43	Purchase Order Processing
H44	Contract Management
H44H	Homebuilder Management

H45	Sales Analysis
H46	Warehouse Management
H50	Job Cost Base
H72	Client/Server Base
H73	CS - A/P Voucher Entry
H74	CS - Pay Time Entry
H75	CS - Sales Order Entry
H76	CS - Training & Development
H78	CS - Travel Expense Management
H79	CS - Forecasting
H90	ONEWORLD TOOLS
H91	Design Tools
H92	Interactive Engine/OL
H93	Data Base and Communications
H94	Batch Engine
H95	Tech Resources/Applications
H96	Deployment
H97	Benchmarking/Performance
H98	Internet
H99	Product Version Control
H99P	Technical Tools-OWPVC Internal
JE42	Sales Order/Pricing
JE44	Distribution Contracts
JE48	Automated Gantry Inter.
KZ1	PC Budget Upload (A3 to A5)
KZ2	PC Data Entry for AP
KZ3	PC Data Entry for Payroll
SY	SYSTEM

Z101	MTI Electrical Distribution
Z102	CRES
Z91	System/ Product Codes