
JD Edwards EnterpriseOne Tools 8.97 Foundation Guide

October 2007

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About This Documentation Preface

JD Edwards EnterpriseOne implementation guides provide you with the information that you need to implement and use JD Edwards EnterpriseOne applications from Oracle.

This preface discusses:

- JD Edwards EnterpriseOne application prerequisites.
- Application fundamentals.
- Documentation updates and printed documentation.
- Additional resources.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common fields in implementation guides.

Note. Implementation guides document only elements, such as fields and check boxes, that require additional explanation. If an element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common fields for the section, chapter, implementation guide, or product line. Fields that are common to all JD Edwards EnterpriseOne applications are defined in this preface.

JD Edwards EnterpriseOne Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use JD Edwards EnterpriseOne applications.

You might also want to complete at least one introductory training course, if applicable.

You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards EnterpriseOne menus, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your JD Edwards EnterpriseOne applications most effectively.

Application Fundamentals

Each application implementation guide provides implementation and processing information for your JD Edwards EnterpriseOne applications.

For some applications, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals implementation guide. Most product lines have a version of the application fundamentals implementation guide. The preface of each implementation guide identifies the application fundamentals implementation guides that are associated with that implementation guide.

The application fundamentals implementation guide consists of important topics that apply to many or all JD Edwards EnterpriseOne applications. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of the appropriate application fundamentals implementation guides. They provide the starting points for fundamental implementation tasks.

Documentation Updates and Printed Documentation

This section discusses how to:

- Obtain documentation updates.
- Download documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on Oracle's PeopleSoft Customer Connection website. Through the Documentation section of Oracle's PeopleSoft Customer Connection, you can download files to add to your Implementation Guides Library. You'll find a variety of useful and timely materials, including updates to the full line of JD Edwards EnterpriseOne documentation that is delivered on your implementation guides CD-ROM.

Important! Before you upgrade, you must check Oracle's PeopleSoft Customer Connection for updates to the upgrade instructions. Oracle continually posts updates as the upgrade process is refined.

See Also

Oracle's PeopleSoft Customer Connection, http://www.oracle.com/support/support_peoplesoft.html

Downloading Documentation

In addition to the complete line of documentation that is delivered on your implementation guide CD-ROM, Oracle makes JD Edwards EnterpriseOne documentation available to you via Oracle's website. You can download PDF versions of JD Edwards EnterpriseOne documentation online via the Oracle Technology Network. Oracle makes these PDF files available online for each major release shortly after the software is shipped.

See Oracle Technology Network, <http://www.oracle.com/technology/documentation/psftent.html>.

Additional Resources

The following resources are located on Oracle's PeopleSoft Customer Connection website:

Resource	Navigation
Application maintenance information	Updates + Fixes
Business process diagrams	Support, Documentation, Business Process Maps

Resource	Navigation
Interactive Services Repository	Support, Documentation, Interactive Services Repository
Hardware and software requirements	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Installation Guides and Notes
Integration information	Implement, Optimize + Upgrade; Implementation Guide; Implementation Documentation and Software; Pre-Built Integrations for PeopleSoft Enterprise and JD Edwards EnterpriseOne Applications
Minimum technical requirements (MTRs)	Implement, Optimize + Upgrade; Implementation Guide; Supported Platforms
Documentation updates	Support, Documentation, Documentation Updates
Implementation guides support policy	Support, Support Policy
Prerelease notes	Support, Documentation, Documentation Updates, Category, Release Notes
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Support, Documentation, Documentation Updates, Category, Release Notes
Release value proposition	Support, Documentation, Documentation Updates, Category, Release Value Proposition
Statement of direction	Support, Documentation, Documentation Updates, Category, Statement of Direction
Troubleshooting information	Support, Troubleshooting
Upgrade documentation	Support, Documentation, Upgrade Documentation and Scripts

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in implementation guides:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, business function names, event names, system function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
<i>Italics</i>	Indicates field values, emphasis, and JD Edwards EnterpriseOne or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter <i>O</i> .
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
Monospace font	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe ().
[] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

Implementation guides contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the JD Edwards EnterpriseOne system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

Implementation guides provide cross-references either under the heading “See Also” or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: “(FRA) Hiring an Employee”

Example of a region-specific heading: “(Latin America) Setting Up Depreciation”

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in implementation guides:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in implementation guides:

- USF (U.S. Federal)

- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

Comments and Suggestions

Your comments and suggestions are important to us. We encourage you to send us your feedback about our PeopleBooks and other reference and training materials. Please include the release numbers for the PeopleTools and applications that you are currently using. Email your comments to PSOFT-INFODEV_US@ORACLE.COM.

Common Fields Used in Implementation Guides

Address Book Number	Enter a unique number that identifies the master record for the entity. An address book number can be the identifier for a customer, supplier, company, employee, applicant, participant, tenant, location, and so on. Depending on the application, the field on the form might refer to the address book number as the customer number, supplier number, or company number, employee or applicant ID, participant number, and so on.
As If Currency Code	Enter the three-character code to specify the currency that you want to use to view transaction amounts. This code enables you to view the transaction amounts as if they were entered in the specified currency rather than the foreign or domestic currency that was used when the transaction was originally entered.
Batch Number	Displays a number that identifies a group of transactions to be processed by the system. On entry forms, you can assign the batch number or the system can assign it through the Next Numbers program (P0002).
Batch Date	Enter the date in which a batch is created. If you leave this field blank, the system supplies the system date as the batch date.
Batch Status	<p>Displays a code from user-defined code (UDC) table 98/IC that indicates the posting status of a batch. Values are:</p> <p><i>Blank</i>: Batch is unposted and pending approval.</p> <p><i>A</i>: The batch is approved for posting, has no errors and is in balance, but has not yet been posted.</p> <p><i>D</i>: The batch posted successfully.</p> <p><i>E</i>: The batch is in error. You must correct the batch before it can post.</p> <p><i>P</i>: The system is in the process of posting the batch. The batch is unavailable until the posting process is complete. If errors occur during the post, the batch status changes to <i>E</i>.</p>

U: The batch is temporarily unavailable because someone is working with it, or the batch appears to be in use because a power failure occurred while the batch was open.

Branch/Plant	Enter a code that identifies a separate entity as a warehouse location, job, project, work center, branch, or plant in which distribution and manufacturing activities occur. In some systems, this is called a business unit.
Business Unit	Enter the alphanumeric code that identifies a separate entity within a business for which you want to track costs. In some systems, this is called a branch/plant.
Category Code	Enter the code that represents a specific category code. Category codes are user-defined codes that you customize to handle the tracking and reporting requirements of your organization.
Company	Enter a code that identifies a specific organization, fund, or other reporting entity. The company code must already exist in the F0010 table and must identify a reporting entity that has a complete balance sheet.
Currency Code	Enter the three-character code that represents the currency of the transaction. JD Edwards EnterpriseOne provides currency codes that are recognized by the International Organization for Standardization (ISO). The system stores currency codes in the F0013 table.
Document Company	<p>Enter the company number associated with the document. This number, used in conjunction with the document number, document type, and general ledger date, uniquely identifies an original document.</p> <p>If you assign next numbers by company and fiscal year, the system uses the document company to retrieve the correct next number for that company.</p> <p>If two or more original documents have the same document number and document type, you can use the document company to display the document that you want.</p>
Document Number	Displays a number that identifies the original document, which can be a voucher, invoice, journal entry, or time sheet, and so on. On entry forms, you can assign the original document number or the system can assign it through the Next Numbers program.
Document Type	<p>Enter the two-character UDC, from UDC table 00/DT, that identifies the origin and purpose of the transaction, such as a voucher, invoice, journal entry, or time sheet. JD Edwards EnterpriseOne reserves these prefixes for the document types indicated:</p> <p><i>P</i>: Accounts payable documents.</p> <p><i>R</i>: Accounts receivable documents.</p> <p><i>T</i>: Time and pay documents.</p> <p><i>I</i>: Inventory documents.</p> <p><i>O</i>: Purchase order documents.</p> <p><i>S</i>: Sales order documents.</p>
Effective Date	Enter the date on which an address, item, transaction, or record becomes active. The meaning of this field differs, depending on the program. For example, the effective date can represent any of these dates:

- The date on which a change of address becomes effective.
- The date on which a lease becomes effective.
- The date on which a price becomes effective.
- The date on which the currency exchange rate becomes effective.
- The date on which a tax rate becomes effective.

Fiscal Period and Fiscal Year

Enter a number that identifies the general ledger period and year. For many programs, you can leave these fields blank to use the current fiscal period and year defined in the Company Names & Number program (P0010).

G/L Date (general ledger date)

Enter the date that identifies the financial period to which a transaction will be posted. The system compares the date that you enter on the transaction to the fiscal date pattern assigned to the company to retrieve the appropriate fiscal period number and year, as well as to perform date validations.

JD Edwards EnterpriseOne Tools Foundation Preface

This preface discusses Foundation companion documentation.

Foundation Companion Documentation

Additional, essential information describing the setup and design of JD Edwards EnterpriseOne Tools resides in companion documentation. The companion documentation consists of important topics that apply to the Foundation tasks, as well as other JD Edwards EnterpriseOne Tools. You should be familiar with the contents of these companion documentation depending on the application you are using:

- JD Edwards EnterpriseOne Financial Management Solutions Application Fundamentals 8.12 SP1 Guide
- JD Edwards EnterpriseOne Human Capital Management Application Fundamentals 8.12 SP1 Guide
- JD Edwards EnterpriseOne Customer Relationship Management Application Fundamentals 8.12 SP1 Guide

In addition, this guide contains references to server configuration settings that JD Edwards EnterpriseOne stores in configuration files (such as jde.ini, jas.ini, jdbj.ini, jdelog.properties, and so on). Beginning with the JD Edwards EnterpriseOne Tools Release 8.97, it is highly recommended that you only access and manage these settings for the supported server types using the Server Manager program. See the Server Manager Guide on Customer Connection.

CHAPTER 1

Getting Started with Tools Foundation

This getting starting chapter about Oracle's JD Edwards EnterpriseOne Tools discusses:

- JD Edwards EnterpriseOne Tools Foundation Overview
- JD Edwards EnterpriseOne Tools Foundation Implementation

JD Edwards EnterpriseOne Tools Foundation Overview

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

JD Edwards EnterpriseOne Tools Foundation Implementation

This section provides an overview of what you need implemented to complete Foundation tasks.

In the planning phase of your implementation, take advantage of all of Oracle's sources of information regarding JD Edwards software, including the installation guides and troubleshooting information. A complete list of these resources appears in the preface in *About This Documentation* with information about where to find the most current version of each.

You might also want to complete at least one JD Edwards introductory training course, if applicable. You should be familiar with navigating the system and adding, updating, and deleting information by using JD Edwards menus, and pages, forms, or windows. You should also be comfortable using the World Wide Web and the Microsoft Windows graphical user interface.

CHAPTER 2

Understanding JD Edwards EnterpriseOne Software

This chapter discusses:

- JD Edwards EnterpriseOne access.
- JD Edwards EnterpriseOne software features.
- JD Edwards EnterpriseOne system integration.
- JD Edwards EnterpriseOne foundation.

JD Edwards EnterpriseOne Access

JD Edwards EnterpriseOne supports web client users through the EnterpriseOne Menu. EnterpriseOne Menu is an HTML-based menu system that provides the ability to navigate EnterpriseOne Menus and launch an HTML version of JD Edwards EnterpriseOne. EnterpriseOne Menu is used primarily by end users to conduct end user tasks.

JD Edwards EnterpriseOne Software Features

JD Edwards EnterpriseOne software offers the following features:

- **Multiplatform computing.** JD Edwards EnterpriseOne software has the ability to run on different platforms. This versatility allows for easy maintenance of information across a network.
- **Integrated supply chain.** JD Edwards EnterpriseOne software provides the ability to use the internet and an intranet to enable you to communicate and share information with your employees, customers, and suppliers.
- **Interoperability.** JD Edwards EnterpriseOne software lets you leverage your existing investments in hardware, databases, and software, and integrate them with legacy and third-party products.
- **Adaptability.** JD Edwards EnterpriseOne software adapts easily to different languages, currencies, reporting provisions, and technology standards.
- **Usability.** JD Edwards EnterpriseOne software lets you point and click, drag and drop, and use fill-in-the-blank forms to easily complete your tasks.

Through the JD Edwards EnterpriseOne Portal, users access JD Edwards EnterpriseOne applications using links in the Portal's menus.

The following browsers are supported by JD Edwards EnterpriseOne:

- Safari on Mac OS
- Mozilla on Linux
- Internet Explorer on Windows

JD Edwards EnterpriseOne System Integration

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

JD Edwards EnterpriseOne 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 Enhanced 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.

This guide often refers to Address Book, system 01, to illustrate the foundational concepts of JD 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 JD Edwards software systems

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

JD Edwards EnterpriseOne Foundation

The Foundation Guide introduces you to the integrated environment of JD Edwards EnterpriseOne. Through overviews, procedures, and examples, Foundation describes the operations and functions that are common to all applications. Foundation comprises the following topics:

Topic	Description
JD Edwards EnterpriseOne Access	Learn about the different applications that can be used as an entry point for accessing JD Edwards EnterpriseOne tools and applications.
Application User Interface	Learn about the operating environment, including menus, forms, and the grid.
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 and work with messages from JD Edwards EnterpriseOne users and recipients outside of the JD Edwards EnterpriseOne software environment.
Media Object Attachments	Learn how to attach objects (text, images, OLE objects, and JD Edwards EnterpriseOne shortcuts) to rows and forms.
MailMerge Workbench	Learn about merging JD Edwards EnterpriseOne 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 functionality, types, and how to access and use processing options.

CHAPTER 3

Using the JD Edwards EnterpriseOne Web Application User Interface

This chapter provides an overview of the web application user interface, and discusses how to:

- Access the JD Edwards EnterpriseOne web client.
- Navigate in EnterpriseOne
- View the Data in Tables and Business Views.

Understanding Web Application Forms

This section discusses web application forms.

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 any field in the grid. The standard title for a Find/Browse form begins with "Work With" followed by information that is specific to the business task. You cannot add or change existing records on a Find/Browse form.

Find/Browse forms enable you to do these tasks:

- Search, view, and select multiple records in a grid
- Exit to another form to add, change, or view a record

Search/Select Form

Use the Search/Select form to locate a value for a field. The grid displays values that are stored in a database table. When you select 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 (UDC) into a field, the search button appears, enabling you to access a Search/Select form that displays a list of UDCs. 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.

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. Data that is common to all the records in the grid displays at the top of the form.

Header Detail and Headerless Detail forms enable you to:

- Display multiple records
- View records
- Add records
- Change records
- Delete records

Fix/Inspect Form

The Fix/Inspect form does not include a detail area. If a record was chosen 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 enable you to:

- View a single record
- Add a record
- Change a record

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.

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 JD Edwards EnterpriseOne software. 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 the system.

Power Forms

Power forms are web-only application forms that enable you to view multiple, interrelated views of data, grids, and tab pages on one form and to pass logic between them. The tab pages can have their own business views (BVs), and these BVs can communicate with each other and can update based on data selection and changes that occur in other BVs on the form.

Accessing JD Edwards EnterpriseOne Web Client

This section provides an overview of accessing the JD Edwards EnterpriseOne web client and discusses how to:

- Access the JD Edwards EnterpriseOne Web Client through the JD Edwards Collaborative Portal.
- Accessing the JD Edwards EnterpriseOne Web Client through the through the Enterprise Portal.
- Access the JD Edwards EnterpriseOne Web Client Directly.

Understanding JD Edwards EnterpriseOne Web Client Access

Accessing JD Edwards EnterpriseOne applications on the web is similar to accessing files and applications on a company network. Typically, either when you start your computer or when you want to access company network directories, you must sign in to identify yourself to the system as an employee who has the right to access company resources. After you sign in, you can access files and applications on the network. Similarly, you must sign in the Web client-the gateway through which you access JD Edwards EnterpriseOne-before you can launch JD Edwards EnterpriseOne applications.

To sign in to the JD Edwards EnterpriseOne web client, your computer must have access to your company's intranet, you must have a Web browser installed on your computer, and your system administrator must create an account for you. When your system administrator sets up your account, he or she creates a user ID and assigns you a password.

Usually, you must enter your ID and password when you launch the JD Edwards EnterpriseOne web client. However, your system administrator can configure your computer in such a way so that you appear to bypass the sign-in process. For security reasons, however, most system administrators want you to sign in manually. When you sign in to the JD Edwards EnterpriseOne web client, EnterpriseOne Menu appears. EnterpriseOne Menu enables you to access JD Edwards EnterpriseOne applications, reports, and other features.

Accessing the JD Edwards EnterpriseOne Web Client through the JD Edwards Collaborative Portal

When you sign in to the Collaborative Portal, the Portal can pass your sign-in information to JD Edwards EnterpriseOne. Therefore, all you must do is bring up a workspace containing the EnterpriseOne Menu portlet. The EnterpriseOne Menu portlet enables you to access JD Edwards EnterpriseOne applications, reports, and other features.

Accessing the JD Edwards EnterpriseOne Web Client through the through the Enterprise Portal

When you sign in to the Enterprise Portal, the Portal can pass your sign-in information to JD Edwards EnterpriseOne. To access specific JD Edwards EnterpriseOne applications, reports, or features, your system administrator must provide you with specific menu options. Choose a menu option to launch a specific JD Edwards EnterpriseOne object.

Accessing the JD Edwards EnterpriseOne Web Client Directly

To sign in to the JD Edwards EnterpriseOne web client directly:

Follow this task to sign in to the JD Edwards EnterpriseOne web client if you do not use a portal.

1. Launch your Web browser and navigate to your company's JD Edwards EnterpriseOne Web sign-in.

Depending on how your system administrator has configured your system, the Web sign-in might appear when you launch your browser, you might need to click a button or a link, or you might need to navigate to a particular page. Your ability to access the JD Edwards EnterpriseOne Web Client directly might have been disabled. If you do not know how to find the JD Edwards EnterpriseOne Web sign-in, contact your system administrator.

2. Complete the following fields:
 - User ID
 - Password
3. If your system administrator indicated that you must sign in to a particular environment, click Details and complete the Environment field.
4. If you have multiple roles and wish to sign in as one of them, click the Details button and complete the Role field.

Note. The default value is *ALL, which signs you in as a member of all of your roles. Select the *ALL role if you are not sure which role to use.

5. If you want your computer to remember your settings for the future, select Remember my sign in information.

Note. Do not use this option if other people have access to your computer.

6. Click Sign In.

The EnterpriseOne Menu appears.

Navigating in EnterpriseOne

This section provides an overview of the EnterpriseOne Menu, and discusses how to:

- Navigate in EnterpriseOne Menu.
- Use the fast path.
- Access your favorites task view.
- Add a Task to your Favorites Task View

Understanding EnterpriseOne Navigation

EnterpriseOne Menu is the Web-based application you run to access JD Edwards EnterpriseOne applications.

Menu

The left portion of EnterpriseOne Menu displays a tree structure that you can use to navigate to the specific application or report that you want to launch. The tree can contain objects other than applications; for this reason, all objects in the tree are called tasks. Nodes, applications (including reports), and shortcuts in the tree are all tasks. Each time you click a node, you expand the tree a level and the view of the tree changes.

Principal sets of tasks are called task views. Your system administrator configures your task view list; that is, the initial contents of the tree. The list might start or end with a special task view called Favorites. All your other task views appear above or below this one.

System administrators use JD Edwards Solution Explorer and JD Edwards EnterpriseOne ERP security applications to manage user accounts and to configure EnterpriseOne Menu.

As you expand nodes the description of the node will wrap to the next line. You can use the Expand icon on the top of the menu to maximize the menu to full screen. To collapse the menu to the fixed width, you use the Restore icon. When the menu is expanded, applications will be displayed in a new window. You can customize the width of the menu by clicking the edge of the menu and dragging it to the size you desire. This width will be stored for you, and will continue to display at the same width until you change it.

EnterpriseOne Menu displays visual cues to help you identify the type of task. Interactive applications have a dash (-) beside them; batch applications have a blue dot beside them; all other tasks have a green dot beside them.

Open Application List

EnterpriseOne Menu enables you choose to have applications launch in a new window, or to launch in the window that is already displayed, replacing the current application located there. Each application that is open displays at the top of the EnterpriseOne Menu. This enables you to navigate between open applications.

Fast Path

Fast Path is a field that enables you to access a specific task (that is, a folder, application, or report) directly. You use commands in Fast Path to move quickly among menus and applications. To use the Fast Path field, enter a Fast Path code and click the button to the right of the field. Depending on how your system administrator configured your account, you might not be able to see Fast Path. You can also use the Fast Path field to access menus. Task views are composed of menus and individual tasks. Menus have no special format in EnterpriseOne Menu; they simply provide application developers with a convenient method of grouping applications. When you access a menu, you actually access a specific place in a task view. To access a menu, enter its ID. For example, G0 accesses the Foundation Systems menu. You can find a menu's ID by hovering over it. To launch an application, enter the application's program number. To specify a form in the application, enter the application's program number 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 Address Book application. You can specify a version of a form to open by adding a | and the version number after the form name; for example, P01012|W01012B|ZJDE0003. Contact your system administrator for specific internal task, menu, and application IDs. Not all objects have Fast Path commands.

Favorites

The Favorites task view is where you can save links to other tasks. If you frequently run a task, you can save that task in your favorites list. Then, you can access that task directly from your Favorites task view. You have your own Favorites task view, and other users in your company have their own Favorites task views. No one else can see your Favorites task view or your changes. Depending on how your system administrator configured your account, you might not be able to see or change your Favorites task view.

4. If you have multiple applications open, click the application name under Open Applications to bring a specific application to the forefront.

Depending on the object type, you might be able to select a version or to set data selection or processing options. Click the triangle to the right of the object and make a choice from the resulting drop-down menu.

Accessing your Favorites Task View

To access your Favorites task view:

In EnterpriseOne Menu, click the Favoritestask.

Adding a Task to your Favorites Task View

Access EnterpriseOne Menu.

To add a task to your Favorites task view:

1. In EnterpriseOne Menu, navigate to the task that you want to add to your Favorites task view.
2. Click the arrow next to the task and select Add To Favorites from the resulting menu.

Using the Grid

This section provides an overview of the grid and discusses:

- Create a Grid Format.
- Create a Grid Format for Pervasive Devices.
- Apply a Grid Format.
- Change a Grid Format.
- Delete a Grid Format.
- Hide or Showing Grid Columns.
- Rearrange Grid Columns.
- Set Grid Color and Font.
- Change Grid Column Width.
- Change the Sort Sequence of a Grid.
- Exporting All Records from a Grid
- Exporting Detail Area Content to Microsoft Excel, Word or to a Comma Separated Values File
- Importing Data from an External Spreadsheet to a Grid

Understanding the Grid

Similar to find/browse forms, hierarchical grids, or parent/child browse forms, are used to query business views (BVs) and select records from BVs for operations. However, instead of a default grid control, hierarchical grids contain a default parent child control instead. Whether or not you have hierarchical grids depends on if your system administrator incorporated them into the applications you use.

The following table describes the features of the hierarchical grid:

Feature	Description
Cut, Copy, and Paste	You can cut, copy, and paste a node in the tree. Cutting a node will copy the data of a node and mark the node as being cut. Copy will copy the data of a node. Paste will paste the node as the last child of the new node. If the node is copied, the original node stays. If a node has been cut, the original node is removed. Cancel Cut will cancel the operation. Use the copy, cut, and paste buttons located on the toolbar of the grid to perform these functions.
Indent/Outdent	You can change the indentation of a tree node. Use the Indent and Outdent buttons located on the toolbar of the grid to perform these functions.
Expand All	You can expand all the nodes in the tree. Use the Expand All button located on the toolbar of the grid to perform this function.
Collapse All	You can collapse all the nodes in the tree. Use the Collapse All button located on the toolbar of the grid to perform this function.
Fully Expand One Tree Node	You can fully expand a selected tree node. When this happens, all cascading children of the selected tree node will be displayed. Use the Expand All button to perform this function.
View Location Number	If your system administrator has turned on the View Location Number option, you will see a number beside each tree node. Use this number to determine the location of the tree node within the tree.
Flat Display Tree	You can make all tree nodes display on one vertical level. Child nodes will not be indented.
Select All Children	You can select all of the children in a node. Use the Select All button located on the toolbar of the grid to perform this function.
Editable Parent Child	You can edit the tree column and all the grid columns in the hierarchical grid.
Change Data Dictionary Item on the Fly	You can display custom selected columns in a user defined sequence.
Vertical Scrolling Keeps Column Header	When scrolling down grid data, grid column header will remain visible.

Understanding Grid Icons and Buttons

This table shows the icons and buttons that might display on the grid. Whether or not you see any of these icons or buttons depends on if the application you are using was designed to display them. You might see a variation of these icons and buttons, depending on the application in which you are working.



Delete



Edit



Lock



Unlock



Move Up



Move Down



Price



Print



Attach



Copy



View



Toggle Off



Toggle On



Weigh

Creating a Grid Format

Your ability to create a grid format depends on whether or not your system administrator has enabled the Customize Grid option. If you do not see the Customize Grid option in the blue bar located at the top of the grid, you do not have permissions to customize the grid.

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.

Note. Columns that you are required to use have an asterisks beside the column name. You cannot remove these required columns from your grid format.

Access the application for which you want to create a new grid.

1. Launch the application for which you want to create a new grid format and click the Customize Grid link.
2. On Select Grid Format, click the Create button.
3. Enter a name for the format in the Grid Format Name field.
4. Complete the rest of the options as desired, and click the OK button.
5. Click the Close button.

Creating a Grid Format for Pervasive Devices

Access the JD Edwards EnterpriseOne web client.

1. Using the JD Edwards EnterpriseOne web client, launch the application for which you want to create a grid format for pervasive devices.
2. Click Customize Grid and select the format that you want to use for pervasive devices.

If you have not created the format, do so now. Follow the same steps for creating the format that you use for creating a Web-based format. However, keep in mind the limited space and color options offered by most pervasive devices when you decide about columns to display, column widths, column and text colors, and so forth.

3. Click Default for Mobile Device and click Close.

Applying a Grid Format

Access a form with a grid.

On any form with a grid, select a grid format from the drop-down list next to Customize Grid.

You must create one or more grid formats before you can apply a grid format.

Changing a Grid Format

Your ability to change a grid format depends on whether or not your system administrator has enabled the Customize Grid option. If you do not see the Customize Grid option in the blue bar located at the top of the grid, you do not have permissions to customize the grid.

Note. Columns that you are required to use have an asterisks beside the column name. You cannot remove these required columns from your grid format.

Access the application containing the grid format that you want to change.

1. Click the Customize Gridlink.
2. On Select Grid Format, select the grid format that you want to change and click theModify button.
3. To change the name of the grid format, enter a new name in the Grid Format Name field.
4. Change other elements of the grid as desired and click the OK button.
5. Click the Close button.

Deleting a Grid Format

Your ability to delete a grid format depends on whether or not your system administrator has enabled the Customize Grid option. If you do not see the Customize Grid option in the blue bar located at the top of the grid, you do not have permissions to customize the grid.

Access a form with a grid.

1. On any form with a grid, click theCustomize Grid link.
2. On Select Grid Format, select the grid format that you want to delete and click the Delete button.
The grid format disappears from the list.
3. Click the Close button.

Hiding or Showing Grid Columns

Access the application containing the grid you want to change.

Note. Columns that you are required to use have an asterisks beside the column name. You cannot remove these required columns from your grid format.

1. Click theCustomize Grid link and either create a new format or select an existing one to modify.
2. On Customize Grid, scroll to the Display and Order section.
3. To prevent a column from showing on the grid, select it in the Display and Order list, and then click the left arrow.

1. Click the Customize Grid link and either create a new format or select an existing one to modify.
2. On Customize Grid, scroll to the Display and Order section.
3. Click a column name in the Display and Order list.
The column name appears in the Selected Column field.
4. Enter a percentage value in the % Column Width field.
This value is the percentage of the space that you want the system to allot to the column based on the width defined for the data item on which the column is based. You can enter a value between 25 and 400.
5. When finished, click the OK button, and then click the Close button.

Changing the Sort Sequence of a Grid

Access the application containing the grid that you want to change.

1. Click the Customize Grid link and either create a new format or select an existing one to modify.
2. On Customize Grid, scroll to the Data Sequencing section.
3. If you want to sort on a column, click the column name in the Available Columns list, and then click the right arrow.
The system moves the column name from the Available Columns list to the Sequenced Columns list.
A column must be included in the grid—that is, its name must appear in the Display and Order list—before you can sort on it.
4. If you do not want to sort on a column, click the column name in the Sequenced Columns list, and then click the left arrow.
The system moves the column name from the Sequenced Columns list to the Available Columns list.
5. To rearrange the order of sort precedence, use the up and down arrows under the Sequenced Columns list to rearrange the column names.
The system first sorts by the column at the top of the list, then by the column second from the top, and so forth.
6. To sort column values in ascending order, click the column name in the Sequenced Columns list and select the Ascending check box.
If you leave the Ascending box blank, the system sorts the column in descending order.
An A appears next to the column names to be sorted in ascending order, and a D appears next to the column names to be sorted in descending order.
7. When finished, click the OK button, and then click the Close button.

Exporting All Records from a Grid

You can export all records from a grid, rather than choosing a range of records to export.

1. Launch an application with a detail area, and then click the Find button to load the detail area with records.
2. Click the Tools icon, and then click the Export Grid Data menu.
3. On Export Assistant, select one of these options:

- Export To Excel

Note. If you select this option, select if you want to export to a new workbook, or an existing workbook.

- Export To Word
- Export To Comma Separated Values (CSV) File character encoding

4. Select the Export All option.
5. Click Continue.

Exporting Detail Area Content to Microsoft Excel, Word or to a Comma Separated Values File

Access an application with a grid.

1. Launch an application with a grid, and then use Find to load the detail area with records.
2. From the Tools menu, click Export Grid Data.
3. On Export Assistant, select one of these options:
 - Export to Excel
If you select this option, select if you want to export the data to a new workbook, or an existing workbook.
 - Export to Word
 - Export to Comma Separated Values
4. Select Export All to export all the data in the grid, or clear the Export All check box to export a range cells within the grid containing data that you want to export.
If you clear the Export All check box, then you must select on the grid the range of cells you want to export. First, click the cell where you want the range to begin, then click the cell where you want the range to end.
If you click the wrong cell, click Reset Selection.
5. Click Continue.

The system exports the detail area contents that you selected to the appropriate file type and displays it.

Importing Data from an External Spreadsheet to a Grid

You can import data from an external spreadsheet into a grid in EnterpriseOne. The external grid must be in CSV or Excel format. EnterpriseOne enables you to choose a range of data by entering the beginning and ending row and column where the data resides in the spreadsheet.

Access an application with a grid.

1. From the Tools menu, choose Import.
2. Click the Import from Excel or the Import From Comma Separated Values (CSV) option.
If you choose the CSV option, the Excel file and Worksheet name options are hidden.
3. In the Excel file: field, enter the location where the external spreadsheet from which you want to import data resides. You can also click the Browse button located beside the field and navigate to the file.

4. In the Starting Cell fields, in the Col and Row fields, enter the co-ordinates of the first cell in the range of cells you want to import from the external file.
5. In the Ending Cell fields, in the Col and Row fields, enter the co-ordinates of the last cell in the range of cells you want to import from the external file.
6. Click one of the following options:
 - **Insert** (Import new rows at column A, row 0 of the grid): click this option if you want to add the rows you identified to the beginning of the grid. This option will not overwrite the existing data that resides in the grid; rather, it will add the rows to the existing data.
 - **Paste**: click this option if you want to overwrite the existing data that resides in the grid. With this option, you can paste the new rows anywhere in the existing grid. If you paste a range of data that exceeds the existing range of data in the grid, EnterpriseOne appends the new data after the last row of the grid data. These new rows are new, not overridden.

If you choose Paste, the Select Paste Location in Grid fields become active. Enter the first cell location where you want to paste the data.

You can click Reset to undo your changes and to return the initial data that was in the grid when you first entered the Import Assistant.
7. Click Apply.

Working with Records

The section provides an overview of records and discusses how to:

- Locate Records Using Specific Selection Criteria
- Use the Query-by-Example Line
- Locate Records Using Wildcards and Operators
- Choose a Record
- Add a Record
- Change a Record
- Delete a Record

CHAPTER 4

Using JD Edwards Web Applications and Reports

This chapter provides an overview of web applications and reports and discusses how to:

- Launch an application or report.
- Launch applications in separate windows
- Send a shortcut to an application form
- Use Web application forms.
- Use detail area.
- Recover data.
- Work with search criteria

Note. If you are not using Internet Explorer as your browser, you might not have access to some of the functionality mentioned in this chapter.

Launching Applications and Reports

This section provides an overview of how to launch an application or report and discusses how to:

- Launch an application or report.
- Launch Applications in Separate Windows
- Send a Shortcut to an application form.

Understanding How to Launch an Application or Report

JD Edwards provides a variety of applications, reports, and other objects. Typically, you access these objects from the EnterpriseOne Menu.

Launching an Application or Report

Access EnterpriseOne Menu.

1. In EnterpriseOne Menu, navigate to the application or report you want to launch.
2. To launch the application or report without defining processing options, version, and so forth, double-click the report or application.

Applications launch immediately. If you launch a report the system launches Work with Batch Versions so you can select which version you want to run.

3. To select processing options or version for an application, click the arrow next to the task and select Values or Versions, respectively.

JD Edwards EnterpriseOne contains a feature called Page at a Time PDF that assists in downloading large files quickly. If your system administrator has enabled this feature, you should immediately see the first page of the PDF file. If Page at a Time is not enabled, you will see a blank screen in the PDF viewer while the file downloads. If this is the case, contact your system administrator.

Changing your Password

Access EnterpriseOne Menu.

1. In EnterpriseOne Menu, click User Options.
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

Sending a Shortcut to an Application Form

While you are working in the JD Edwards EnterpriseOne web client, you can email other users a shortcut to the application and form that you are looking at. The recipient double-clicks the shortcut in the email to access your current position in the software.

To send a shortcut to an application form:

1. Launch a Web application and access the form that you want to send.
2. Click Tools and select Send Shortcut.
3. On Send Shortcut, complete these fields:
 - Address Number / User / Role / Distribution List

Note. If you are sending a shortcut to members of a distribution list, you must click the Distribution List option and then select the address book number of the distribution list. If you enter the distribution-list address-book number without choosing the Distribution List option, the shortcut will be sent only to the distribution-list address-book number and not to the members of the distribution list.

- Mail Box

Select which mailbox/queue you want the message to be sent to.

- Subject

Type the text that you want to appear in the Subject line of the email message.

4. If you want to include a message with the shortcut, type it in the large field at the bottom of the form.
5. Click OK to send the shortcut.

The recipient will receive the shortcut using an email in the Work Center or a third-party email system, depending on the recipient's email preferences in JD Edwards EnterpriseOne.

Working with Search Criteria

This section provides an overview of search criteria and discusses how to:

- Save search criteria
- Apply saved search criteria
- Edit search criteria
- Delete search criteria

Understanding Search Criteria

You can create search criteria using the QBE and wildcard features, then save that criteria for use later. Save search criteria that you use often to find records. Your ability to save search criteria depends on how the application has been designed. The search criteria that you save is available to you only; no other user can access it.

After you have saved search criteria using the Save Query option, you can apply the criteria to your current search.

Saving Search Criteria

Access a form that contains the Save Query option.

1. Enter your search criteria in the fields and then click Save Query.
2. On Save Query, in the Saved Query Name field, type a name for the saved search criteria.
3. Click the More Options link to enter more search criteria to further narrow your search. The information that is listed as more options is determined by how the application has been designed.
4. Click Save.

Applying Saved Search Criteria

To apply criteria to your current search:

1. Access the form where you saved your search criteria.
2. From the Select a Query field, select the query that contains the search criteria you want to apply.
JD Edwards EnterpriseOne applies the search criteria to the current form.

Editing Search Criteria

Access the form where you saved your search criteria.

1. Click Edit Queries.
2. Select the query you want to edit.
3. Edit the information.

Deleting Search Criteria

Access the form where you saved your search criteria.

1. Click Edit Queries.
2. Select the query you want delete, and click Delete.

Viewing the Data in Tables and Business Views

The section provides an overview of Data Browser and discusses how to:

- Access Data Browser.
- Search for data in tables.
- Search for data in business views.
- Use existing queries to search for data in tables and business views.

Understanding Data Browser

If you want to view the data in tables and business views, you can use Data Browser. This tool enables you to verify the existence of data in a table or business view, as well as to determine the table or business view structure. This section provides an overview about the EnterpriseOne Menu, and discusses how to:

- Access Data Browser.
- Use existing queries to search for data.
- Search for data in tables.
- Search for data in business views.
- Create personal search queries for data in tables and business views.

Accessing Data Browser

Type databrowser in the Fast Path. If you type databrowser in the Fast Path, the Query Selector form displays. If you are in an application, you can access the Data Browser by clicking the Tools menu, and then clicking Data Browser. If you access the Data Browser from an application, the Query Selector and the Data Browser forms display. The Query Selector form enables you to select queries, tables, or business views to search for data. The Data Browser form enables you to search for data for a specific table or business view. When you access Data Browser from an application, the only tables and business views on which you can search are those that correspond to the application you are in.

Searching for Data in Tables

Access the Data Browser.

1. Type databrowser in the Fast Path.
2. Select the By Table option.
3. In the Name field located under the By Table option, type the name of the table on which you want to search, or use the search button to locate a table.
4. Press Tab.

The Data Source field automatically displays the name of the data source in which the table resides for the environment in which you are currently logged.

5. In the Data Source field, if the data source that is displayed is different than the one from which you want to search, type a new data source, or use the search button to locate a data source.
6. Click OK.

Searching for Data in Business Views

Access the Data Browser.

1. Type databrowser in the Fast Path.
2. Select the By Business View option.
3. In the Name field, type the name of the business view on which you want to search, or use the search button to locate a business view.
4. Click OK.

Using Existing Queries to Search for Data in Tables and Business Views

Access the Data Browser.

1. Select the Personal Queries or Public Queries option.
The Personal Queries option enables you to select from a drop-down menu queries you have created for yourself. The Public Queries option enables you to choose from a drop-down menu queries that have been made available to you by a system administrator.
2. From the drop-down menu located next to the option you selected, select the query on which you want to search.
3. Click OK.

Creating Personal Search Queries to Search for Data in Tables and Business Views

Access the Data Browser.

1. Follow the instructions for Searching for Data in Tables or Searching for Data in Business Views.
2. On Data Browser, enter any filter information you want included in the query.
3. Click Save Query.
4. Click Close.

The query is saved and displays in the Personal Queries drop-down menu.

Recovering Data

This section provides an overview of how to recover data and discusses how to:

- Retrieve all records from the database
- Voluntarily save data

- Retrieve data
- View data

Understanding how to Recover Data

You use JD Edwards EnterpriseOne web client to recover data from applications that have erred or timed out due to:

- Catastrophic errors
- Transaction failures
- Session time outs
- Voluntary save

Data saved from system failures are saved at the time when the system errors, failures, or time outs occur. The P95400 program (Application Failure Recovery Applications) enables you to access and recover data from any transaction from which you have saved data. Using P95400, you can view the data from failed transactions. You must be granted permission by an administrator to view data from applications that are not your own. For example, an administrator might give a sales department supervisor the permission to recover data from transactions performed by other users in the department. If you are unable to save data, check with your system administrator.

Retrieving All Records from the Database

Fetch All Records enables you to retrieve all records from the database that match your search criteria. JD Edwards EnterpriseOne then categorizes the records into larger groups so that you are able to view several records by scrolling through the grid, rather than having to view only ten at a time. The default number of records in a group is 200.

To fetch all records, click the Go to End button located on the blue bar on the grid.

Voluntarily Saving Data

Your ability to save data voluntarily depends on whether or not your system administrator has this feature enabled or disabled. Access an application in which you have entered data.

1. Click Tools, then select one of these options:
Save
Save As
2. On Select Application Failure Header Label, select the check box if you want the JD Edwards EnterpriseOne to assign a label to the data you are saving. To manually enter a label and description, clear the box and enter a label and description in the respective fields.

Note. The label is a name you assign the data, like a filename. The description is a brief explanation that helps you identify what the data is.

3. Click OK.

JD Edwards EnterpriseOne saves the data you have entered in the application.

- Access the calendar.

Filtering Tasks by Role

You filter the tasks that you see by selecting a role. Each role contains its own set of tasks. When you log into JD Edwards EnterpriseOne using the *ALL role, you now see only those tasks associated with a single role rather than a concatenation of all tasks associated with all roles.

In the Web client, you view the other roles assigned to you by choosing the role from the Role drop-down menu located on EnterpriseOne Menu, and then clicking the button to the right of the field.

The tree view changes to show the tasks that are available to the role that you chose.

Using Task Profiles

For each task, you can view profile information about the task itself. To display the profile for a task, click the triangle to the right of the task and select Task Profile.

The Task Profiles window has three tabs: Basic, Intermediate, and Advanced. The information in the window varies based on the item currently selected. Some of the information on the tabs is described below:

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

Working with User Options

When you click My System Options, the User Default Revisions form appears. The following list describes the associated action for each button on the User Default Revisions form:

Button	Description
User Profile Revisions	Launches the User Profile Revisions program (P0092). Only system administrators should change user profiles.
Change Password	Launches the JD Edwards EnterpriseOne Security program (P98OWSEC), which you use to change your password.
Submitted Reports	Launches the Work With Servers program (P986116), which you can use to review the status of a submitted report or job, change your report or job priority, work with the report output, and review errors.
View Local Output	Accesses the PrintQueue directory on the machine that is running JD Edwards EnterpriseOne.
Default Printer	Launches the Printer Application program (P98616). Only system administrators should change default printer settings.

Accessing the Calendar

The calendar enables you to enter and view time sensitive information, such as meetings and appointments. Depending on the permissions your system administrator has assigned you, you can view, add, delete, and modify activities listed in the calendar. You can view the calendar one day at a time, by the week, or by the month. Your system administrator determines the calendar view that you see.

This section discusses the default features and functionality that are available in the calendar. You might not see some of these features or might not be able to perform some functions due to your permissions. The default view for the calendar consists of one large calendar on the left with a Day tab, a Week tab, and a Month tab. Three small calendars are located on the right side. The first small calendar shows the month previous to the month displayed in the large calendar. The second calendar shows the month displayed in the large calendar. The third calendar shows the month following the month displayed in the large calendar. Today's date is highlighted in a yellow box in the appropriate small calendar.

The large calendar and the three small calendars are fully interactive. Clicking in any calendar automatically adjusts the other calendars. For example, if you select a week in the large calendar, the week will be selected in the corresponding small calendar as well.

You can double click in the large calendar to add an activity, if you have appropriate permissions. If you are adding an activity on the Day tab, double clicking on a time line automatically assigns a 30 minute time slot, which you can change. Clicking on the time located at the beginning of the line automatically assigns a 1 hour time slot, which you can change as well. If your calendar displays an activity that exceeds 24 hours, the activity displays in the All Day row at the top of the large calendar. The calendar automatically adjusts across time zones. For example, if someone schedules a meeting for 8:00 a.m. Pacific time, the activity will appear at 10:00 a.m. Central time.

To access the calendar, type P01301 in the Fast Path.

CHAPTER 5

Understanding Messages and Queues

This chapter provides an overview of messages and queues and discusses:

- Internal and External messages
- Workflow messages
- Queues

Messages and Queues Overview

With JD Edwards EnterpriseOne, you can send and receive electronic mail (email) messages through the Work Center program. The JD Edwards EnterpriseOne email system includes messages sent by users and messages sent by a workflow process.

You can organize your messages by placing them into queues (storage areas for your messages) provided by the software or by setting up your own queues. This section explains how to work with your messages and with your queues. In addition, you can indicate your work-time location and add remarks to your time log.

Internal and External Messages

JD Edwards EnterpriseOne sends your email messages in different ways, depending upon whether the message is internal or external to the system.

Internal Messages	Internal messages stay within the JD Edwards EnterpriseOne system. They are read using the Work Center.
External Messages	External messages are sent to third-party email software packages such as Microsoft Outlook or Lotus Notes.

Your system administrator configures your JD Edwards EnterpriseOne user account to receive either internal or external email. However, certain messages are sent as internal email regardless of this preference; for example, notifications of submitted UBE jobs.

Workflow Messages

In addition to sending and receiving internal and external messages, you can receive an active message, which is a type of message that a system workflow process automatically sends to a recipient.

Active Messages	<p>Workflow processes sometimes generate messages that require you to take action, such as approving or rejecting a change to a customer record. A lightning bolt button identifies an active message.</p> <p>Active messages contain a shortcut button that links directly to an application. When you click the shortcut button, the system retrieves the most current information from the database, which ensures that you get accurate information even if changes are made after an active message is sent to you.</p> <p>You can set up a workflow process to send active messages to specific queues.</p>
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Queues

Queues are storage areas that enable you to organize messages using the Work Center. For example, messages can be organized into queues for priority mail or for submitted jobs. Through a queue, users can approve or reject specific tasks in a workflow process. A queue is actually a UDC, and you set up a queue in the same way that you would set up a UDC.

Queues Provided with JD Edwards EnterpriseOne

JD Edwards EnterpriseOne provides these queues:

Sent	Messages that you have sent to others.
Deleted	<p>Messages that you have deleted. After you delete a message, you can view it but you cannot move it to another queue.</p> <p>The system administrator has the authority to purge deleted messages from the system, which is typically done periodically or on a predetermined schedule. You can also remove a message from the system by deleting it from your Deleted queue.</p>
Submitted Jobs	Messages generated by the system for jobs that you have submitted for batch processing, such as the General Ledger Post.

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 could then open that queue and act on the message contained within it.

CHAPTER 6

Working with Messages

This chapter discusses how to:

- Send messages
- Work with shortcuts
- Use the Work Center
- Print messages

Sending Messages

This section provides an overview of sending messages and discusses how to:

- Send an internal message to a single recipient.
- Use a quick list to send a message to multiple recipients.
- Send a message to members of a role.

Understanding How to Send Messages

When you send internal email messages, you send them to other users within JD Edwards EnterpriseOne software. You can control the time of delivery for a message by assigning a tickler date to the message. A tickler date is a date in the future when the system will automatically show 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 enable you to include files, images, or links that conform to the OLE standard, such as word processing documents and spreadsheets.

You can send messages to one or more recipients. If you are sending a message to multiple recipients, you can use a quick list, a predefined distribution list, or a role.

See Also

[Chapter 5, “Understanding Messages and Queues,” page 37](#)

Forms used to Send an Internal Message to a Single Recipient

Form Name	FormID	Navigation	Usage
Send Internal Message	W012505A	From any application, click the Tools button, then click Send Shortcut.	Send a non-workflow shortcut.

Sending an Internal Message to a Single Recipient

Access any application in JD Edwards EnterpriseOne.

1. From any application, click the down arrow on the hyper-button, select Tools, Send, and then select Internal Mail.
2. On Send Internal Mail, click the Search button in the "Send To Address Number / User / Role" field.
3. On Address Number / User / Role, select one of the following options to search for a recipient by address number or user ID, and then click OK:
 - Address Number
 - User
4. Highlight the row that contains the recipient and then click Select.
5. Type the subject of the message in the Subject field.
6. Complete the following optional fields, as necessary:
 - Type
 - Mail Box
 - Marketing
 - Lead Source
 - Keep Copy
 - Receipt Notify
 - Address
 - Contact
 - Tickler Date
 - Phone Number
7. Type your message in the text area at the bottom of the form.
8. To include an attachment with your message, right-click the panel with the Text button.
9. Choose New, and then one of these options:
 - Image
 - OLE
 - Shortcut
 - URL/File
10. Click OK to send the message.

The system returns you to the previous application. If you opt to keep a copy of a message that you send, you can view it in the same queue from which you sent the message.

Using a Quick List to Send a Message to Multiple Recipients

Access any application in JD Edwards EnterpriseOne.

1. From any application, click the down arrow on the hyper-button, select Tools, select Send, and then select Internal Mail.
2. On Send Internal Mail, select Quick List from the Form menu.
3. On Quick List, complete either of the following fields for each person you want on the list, and then click OK:
 - Alpha Name
 - Address Number
4. Follow the steps for sending an internal message to a single recipient.

Note. You cannot save a quick list.

Sending a Message to Members of a Role

Access any application in JD Edwards EnterpriseOne.

1. From any application, click the down arrow on the hyper-button, select Tools, select Send, and then select Internal Mail.
2. On Send Internal Mail, click the Search button in the "Send To Address Number / User / Role" field.
3. On Address Number / User / Role, select the Role option, and then click OK.
4. Highlight the row that contains the role that you want to use and then click Select.
5. Follow the steps for sending an internal message to a single recipient.

Working with Shortcuts

This section contains an overview of working with shortcuts and discusses how to send a non-workflow shortcut.

Understanding Shortcuts

With the JD Edwards EnterpriseOne messaging system, you can send messages that contain a shortcut to a JD Edwards EnterpriseOne application. When you send a shortcut, you can preface it with a message for the recipient to review and approve. For example, you might want your manager to approve a change that you made to a customer record. After sending a shortcut to your manager, he or she can view the record immediately by clicking the shortcut button. When you send a shortcut, the system sends the key for that particular record to the recipient. When the recipient clicks the shortcut button, the system opens the application and retrieves the record.

The JD Edwards EnterpriseOne system uses workflow to automatically send messages with a shortcut to an application. These types of messages, called active messages, require that the recipient open the shortcut to verify information or approve a transaction.

Since JD Edwards EnterpriseOne software supports Windows and Web clients, the message can contain a shortcut for a Windows application or a Web application.

Form Used to Send a Non-Workflow Shortcut

Form Name	FormID	Navigation	Usage
Send Shortcut	W012505A	From any application, click the Tools button, then click Send Shortcut.	Send a non-workflow shortcut.

Sending a Non-Workflow Shortcut

From the application from which you want to create a shortcut, access any records you want the recipient to view.

1. Click the down arrow on the hyper-button and select Tools, and then Send Shortcut.

The Send Shortcut form appears with a shortcut to the application.

2. On Send Shortcut, complete these fields:
 - Address Number / User / Role / Distribution List
 - Mail Box (Internal Messages Only)
 - Subject
3. Type your message.
4. Click OK to send the message.

Using the Work Center

This section provides an overview of the Work Center and discusses how to:

- View messages.
- Revise messages.
- Move a message to another queue.
- Redirecting messages to the Priority or Secondary queue.
- Cancel the delivery of messages.
- Reassign messages.
- Delete messages.
- Print messages.
- Print a report that lists all messages in a queue

- Phone Number
- Tickler Date
- Text area

Moving a Message to Another Queue

Access any application:

1. Click the down arrow on the hyper-button, select Tools, and then select 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.
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

Access any application.

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select the message that you want to redirect to your Priority Mail or Secondary queue.
3. From the Row menu, select one of these options:
 - Priority
 - Secondary
4. Expand the target queue to verify the placement of your message.

Any further messages that you receive from this sender will arrive in the queue that you selected. Repeat these steps for redirecting other users' messages.

Canceling the Delivery of Messages

Access any application:

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select a message from the user for which you want to cancel automatic delivery.
3. From the Row menu, select 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 appear in that queue.

Reassigning Messages

Access any application:

1. Click the down arrow on the hyper-button, select Tools, and then select Work Center.
2. On Work Center, select the message that you want to reassign, and then, from the Row menu, select Reassign.
3. On Assign Message, complete these fields and click OK:

CHAPTER 7

Working with Queues

This chapter provides an overview of working with queues and discusses how to:

- Set up queues.
- Log time and add remarks.

Understanding Queues

Queues are a way to group related messages together in the Work Center. 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.

You set up queues in the system as UDCs. The following task describes how to create queues or modify existing queues.

Setting Up Queues

This section discusses how to:

- Set up a queue.
- Specify the queues that a user can view.
- Changing a user's queue security.

Setting Up a Queue

Access the Work With User Defined Codes form.

1. On Work With User Defined Codes, click Add.
2. 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
Enter a name for the queue.
 - Description 2
 - Special Handling

4. Enter your remark in the Remark field.
5. The following fields in the Return area are optional; complete them if necessary:
 - Return Time
 - Return Date
6. Click OK.
7. 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 you can view any remarks.

Access the Work With Employee Queue Manager form.

1. On Work with Employee Queue Manager, select the employee record time log that you want to view.
2. From the Row menu, select Time Log.

CHAPTER 8

Working with Media Object Attachments

This chapter provides an overview of media object attachments and discusses how to:

- Work with media objects.
- Attach media objects.
- Search for media objects.
- Work with templates.
- Work with properties.
- Work with metadata.
- Attach OLE objects at the baser for level.

Understanding Media Object Attachments

JD Edwards EnterpriseOne software media objects and imaging features enable you to attach useful information to an application, including information that might currently exist as a paper-based document. The media objects feature enables you to attach the information to JD Edwards EnterpriseOne software applications, forms and rows, and Object Librarian objects. The imaging feature within media objects gives you the flexibility to create an 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 discusses the types of information that you can attach to a grid row or form:

Information	Description
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.

Attaching a File

Access a form where attachments are available.

1. On a form where attachments are available, do one of these tasks:
 - To attach an image to a form, from the Form menu, select Attachments.
If attachments exist for the form, click the paper clip button to the right of the status bar.
 - To attach an image to a grid row, select the row and then, from the Row menu, select Attachments.
2. On Media Objects, do one of these tasks:
 - From the File menu, select New and then Image.
 - In the button panel, click the right mouse button, select New, and then select Image from the pop-up menu.
3. Complete these options:
 - Queue Name
 - Files of Type

The Preview option contains a default check mark 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 the system supports the graphic format, the image appears in the viewer panel.
5. When you finish, from the File menu, select 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.

Attaching an OLE Object

Access a form where attachments are available.

1. On a form where attachments are available, do one of these tasks:
 - To attach an OLE object to a form, from the Form menu, select Attachments.
If attachments exist for the form, click the paper clip button to the right of the status bar.
 - To attach an OLE object to a grid row, select the row and then, from the Row menu, select Attachments.
2. On Media Objects, do one of these tasks:
 - From the File menu, select New and then OLE.
 - In the button panel, click the right mouse button, select New, and then select OLE from the pop-up menu.

Creating a Template

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.

Access a form where attachments are available.

1. Select the row from which you want to attach a template, and then select Attachments from the Row menu.
2. On Media Objects, in the button panel, click the right mouse button and select Templates from the pop-up menu.
3. On Media Objects Template, click Add.
4. On Media Object Template Revisions, complete these fields, and then enter your template information into the workspace:
 - Template Name
 - Description
5. Click Add.

Attaching a Template

Access a form where attachments are available.

1. Select the row to which you want to attach a template, and then select Attachments from the Row menu.
2. On Media Objects, in the button panel, click the right mouse button and select 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 button 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.

Modifying a Template

Access a form where attachments are available.

1. Select the row from which you want to modify a template, and then select Attachments from the Row menu.
2. On Media Objects, in the button panel, click the right mouse button and then select 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, select Save and Exit.

Hot Keys	Action
Ctrl + Alt + R (web client only)	Open Row menu
Up or Down Arrows	Move focus up or down between options on fly out menus. Press Enter to launch the option.

EnterpriseOne Menu

Hot Keys	Action
Alt + / (web client only)	Move focus to Fast Path when in EnterpriseOne Menu
Ctrl + Enter	Opens new window.
Ctrl + mouse click	Opens new window.
Up and Down Arrows (web client only)	Move focus up or down from present node in navigation tree. If next node is a child node, move focus to it
Right Arrow (web client only)	Expand present node in navigation tree
Left Arrow (web client only)	Collapse present node in navigation tree
Enter (web client only)	Launch end node if hyperlinked. If parent node, expand it. If expanded, collapses it
Ctrl + Right Arrow	Activates the fly out for a menu item.
Esc	Cancels the fly out for a menu item.
Up Arrow and Down Arrow	Navigates the fly out when active.
Ctrl + Home	If focused on the menu, this hot key combination will take you to the first menu item.
Ctrl + End	If focused on the menu, , this hot key combination ill take you to the last menu item.
Alt + X	Expands the menu to full size.

Hot Keys	Action
ENTER in grid row	Move focus to first editable field in the row below
Ctrl + Home	Move focus to first row, current column
Ctrl + End	Move focus to last row, current column
Ctrl + Alt + [spacebar] (web client only)	Select current row

APPENDIX B

JD Edwards EnterpriseOne Software Systems

This appendix provides a list of the JD Edwards EnterpriseOne systems.

JD Edwards EnterpriseOne Software Systems

The following table identifies the JD Edwards EnterpriseOne 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

Number	System
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

Number	System
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

Number	System
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

Number	System
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

Number	System
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	JD Edwards EnterpriseOne TOOLS
H91	Design Tools
H92	Interactive Engine/OL
H93	Data Base and Communications

Number	System
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

