
JD Edwards EnterpriseOne Tools 8.97 Solution Explorer Guide

October 2007

Contents

- General Preface**
 - About This Documentation Prefacev**
 - JD Edwards EnterpriseOne Application Prerequisites.....v
 - Application Fundamentals.....v
 - Documentation Updates and Printed Documentation.....vi
 - Obtaining Documentation Updates.....vi
 - Downloading Documentation.....vi
 - Additional Resources.....vi
 - Typographical Conventions and Visual Cues.....vii
 - Typographical Conventions.....viii
 - Visual Cues.....viii
 - Country, Region, and Industry Identifiers.....ix
 - Currency Codes.....x
 - Comments and Suggestions.....x
 - Common Fields Used in Implementation Guides.....x
- Preface**
 - JD Edwards EnterpriseOne Solution Explorer Guide Preface.....xiii**
 - JD Edwards EnterpriseOne Tools Companion Documentation.....xiii
- Chapter 1**
 - Getting Started with JD Edwards EnterpriseOne Solution Explorer.....1**
 - JD Edwards EnterpriseOne Solution Explorer Overview.....1
 - JD Edwards EnterpriseOne Solution Explorer Implementation.....1
 - JD Edwards EnterpriseOne Solution Explorer Implementation Steps.....1
- Chapter 2**
 - Using the Menu Design Mode.....3**
 - Understanding the Menu Design Mode.....3
 - Understanding How to Set Up Task Views.....3
 - Working with Task Views.....3
 - Creating a New Task View.....4
 - Changing a Task View.....4

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 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 Solution Explorer Guide Preface

This preface discusses JD Edwards EnterpriseOne Solution Explorer.

JD Edwards EnterpriseOne Tools 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 JD Edwards EnterpriseOne Solution Explorer as well as other JD Edwards EnterpriseOne Tools. You should be familiar with the contents of these companion guides:

- JD Edwards EnterpriseOne Tools System Administration
- JD Edwards EnterpriseOne Tools System Security
- JD Edwards EnterpriseOne Tools Object Management Workbench

See Also

JD Edwards EnterpriseOne Tools 8.97 System Administration Guide, “Getting Started with JD Edwards EnterpriseOne Tools System Administration”

JD Edwards EnterpriseOne Tools 8.97 Security Administration Guide, “Getting Started with JD Edwards EnterpriseOne Tools Security Administration”

CHAPTER 1

Getting Started with JD Edwards EnterpriseOne Solution Explorer

This chapter discusses:

- JD Edwards EnterpriseOne Solution Explorer Overview
- JD Edwards EnterpriseOne Solution Explorer Implementation

JD Edwards EnterpriseOne Solution Explorer Overview

Oracle's JD Edwards EnterpriseOne Solution Explorer provides you with a convenient method for accessing Windows-based JD Edwards EnterpriseOne applications, and creating/maintaining JD Edwards EnterpriseOne task views for Web or Windows.

JD Edwards EnterpriseOne Solution Explorer is comprised of the following three modes:

- Menu Design Mode
Use the Menu Design Mode to set up menus, tasks, task views, and task view roles.
- Menu Filtering Mode
Use the Menu Filter Mode to enable and disable tasks users assigned a certain role can perform.
- Task Launching Mode
Use the Task Launching Mode to navigate to development and administrative applications in JD Edwards EnterpriseOne using the Fast Path, or using the menu.

JD Edwards EnterpriseOne Solution Explorer Implementation

This section provides an overview of the steps that are required to implement JD Edwards EnterpriseOne Solution Explorer.

In the planning phase of your implementation, take advantage of all JD Edwards sources of information, 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.

JD Edwards EnterpriseOne Solution Explorer Implementation Steps

This table lists the steps for the JD Edwards EnterpriseOne Solution Explorer implementation.

Step	Reference
1. Set up task views.	Chapter 2, “Using the Menu Design Mode,” Understanding How to Set Up Task Views, page 3
2. Set up tasks.	Chapter 2, “Using the Menu Design Mode,” Setting Up Tasks, page 5
3. Set up task view roles.	Chapter 2, “Using the Menu Design Mode,” Applying Roles to a Task, page 9

4. Select the Executable tab, and then select one of the following task type options:
 - **Interactive**
Select this option for a task that launches an interactive JD Edwards EnterpriseOne program.
 - **Batch**
Turn on this option for a task that launches a JD Edwards EnterpriseOne batch program.
 - **URL**
Turn on this option for a task that launches a web page.
 - **Folder**
Turn on this option for a task to be used as an activity or nonsoftware placeholder in a task view. This task does not execute a function, but might have accompanying documentation that describes the activity.
 - **User Defined Code**
Turn on this option for a task that launches a program that enables a user to modify UDC tables.
 - **EnterpriseOne Workflow**
Turn on this option for a task that displays workflow processes.
 - **Crystal Enterprise**
Turn on this option for a task that links to Crystal Enterprise. This task only works on the web. You should have Crystal Enterprise set up to use its task type.
5. If you turned on the Interactive option, complete the following fields:
 - **Application**
Enter the object name of the program.
 - **Version**
Complete this field only if you want to launch a specific version of a program. Click the Visual Assist to search for a version.
 - **Form**
This is an optional field. To open a specific form in the program, enter the form ID. Click the Visual Assist to search for a form.
 - **Option Code**
 - **Form Mode**
 - **Application Type**
6. If you turned on the Batch option, complete the following steps:
 - **Application**
 - **Version**
This is an optional field. To launch a specific version of a batch program, enter the version.
7. Select one of the following options:
 - **No Processing Options**
Turn on this option to execute the batch program without processing options.

10. In Task where Used, click Close.
11. In Work With Tasks, select the task that you want to delete, and then click Delete.
12. In Confirm Delete, click OK.

Clearing Cache

When you create, delete, or modify menus in JD Edwards EnterpriseOne Solution Explorer, they are saved to the same database from which the web client retrieves them. The web client stores them in a cache directory and then displays them in the JD Edwards EnterpriseOne Menu. To display new or modified menus, you must clear the cache directory. You clear the cache directory through Server Administration Workbench (SAW).

Access Server Administration Workbench.

1. Access and sign in SAW for JAS Servers.
2. From the Views menu, click Config.
3. Click Clear JD Edwards EnterpriseOne Menu Cache.
4. Open the web client.
5. Click the Menu Refreshbutton located on the JD Edwards EnterpriseOne Menu title bar.

See Also

JD Edwards EnterpriseOne Tools 8.97 Security Administration Guide, “Working with User and Role Profiles,” Adding Users to a Role

Changing a Role’s View of a Task View

By modifying roles, you can control users’ task view. Changing the name and version for the role helps you and other users understand the difference between different roles. The changes that you make to the role, such as assigning new task names, apply only to that role. The system preserves the properties that define the default task view. You are not replacing the original view; you are creating an alternative view to be used in specific situations that your business requires.

Access JD Edwards EnterpriseOne Solution Explorer.

1. In a JD Edwards EnterpriseOne Solution Explorer task view, click the Menu Filtering button on the Toolbar.
2. Right-click any task in the task view, and then select View By Role from the menu.
3. In View by Role, select the role to which you want to change, and then click Select.
4. Double-click a task to make its relationship active or inactive, or right-click a task in the task view and select Override Name to change the task name.
5. Right-click any task and select Save Role.
6. Select the role, and then click Select.

CHAPTER 4

Using the Task Launching Mode

The Task Launching Mode is the default mode for JD Edwards EnterpriseOne Solution Explorer. Use the Task launching mode to navigate to the windows applications either through the menu or through the Fast Path.

