JD Edwards EnterpriseOne Tools

Configuration Utilities Guide

9.2

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Configuration Utilities Guide

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Part Number: E64218-03

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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

Documentation Accessibility

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Related Information

For additional information about JD Edwards EnterpriseOne applications, features, content, and training, visit the JD Edwards EnterpriseOne pages on the JD Edwards Resource Library located at:

`http://learnjde.com`

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
Italics	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`Monospace`	Monospace type indicates commands within a paragraph, URLs, code examples, text that appears on a screen, or text that you enter.
> Oracle by Example	Indicates a link to an Oracle by Example (OBE). OBEs provide hands-on, step- by-step instructions, including screen captures that guide you through a process using your own environment. Access to OBEs requires a valid Oracle account.

1 Configuration Utilities Overview

Overview of Configuration Utilities Program

The JD Edwards EnterpriseOne Configuration Utilities program (P01RS01) from Oracle provides a launching point for the configuration programs and tools that you can use to set up and configure business data, task views, roles, and security, as well as program versions for business processes.

The configuration programs are beneficial for creating valid configurations and implementations for the JD Edwards EnterpriseOne software. The programs are designed specifically for importing and exporting (or conversely) large amounts of data during the initial setup phase of an implementation. Do not use the configuration programs for routine revisions to existing data.

The configuration programs are available in both Microsoft® Windows® and Web environments.

Overview of Configuration Programs for Business Data

You can use the Configuration Utilities program (P01RS01) to launch configuration programs that enable you to export and import business data to and from a Microsoft® Excel® spreadsheet. The advantages of using a spreadsheet include the ability to:

- Use the Find/Replace feature to revise data.
- Sort and filter data.
- Load a translation.
- Easily remove data from columns that are not used.
- Correct invalid data with less effort, instead of by grid row in the configuration program.

Customers can use the configuration programs to import business data from a legacy system to the JD Edwards EnterpriseOne system, or to create business data without a legacy system.

Business partners can use the configuration programs to configure data for implementations or want to create reusable data for other configuration solutions. Business partners can export country-specific business data from a configuration program to a spreadsheet, where they can revise the data to suit the needs of a particular country or client.

Alternatively, business partners can begin the process with data in a spreadsheet and import the data to the corresponding JD Edwards EnterpriseOne table by using the configuration program. For detailed information, see *Overview of the Export and Import Process for Business Data*.

You can use the Configuration Utilities program to launch the following business data configuration programs and update the tables indicated. The first three programs support translated descriptions, as indicated by the D tables:

Program (Program Number)	Table
Configure Business Units (P01RS006)	Business Unit Master (F0006) Business Unit Alternate Description (F0006D)

Program (Program Number)	Table
Configure Accounts (P01RS901)	Account Master (F0901) Account Master Alternate Description (F0901D)
Configure Financial AAIs (P01RS012)	Financial AAIs (F0012) AAI Alternate Description (F0012D)
Configure Order Activity Rules (P01RS204)	Order Activity Rules (F40203)
Configure Order Line Types (P01RS205)	Line Type Constants (F40205)
Configure Manufacturing and Distribution AAIs (P01RS950)	Manufacturing and Distribution AAIs (F4095)

The basic functionality for the six application configuration programs is the same. The programs differ in the fields that display on each form and the fields that are updated in the corresponding table. Depending on whether you use a Microsoft® Windows® or a Web environment, the configuration programs differ in the formats that are available to export and import data, as shown in this table:

Export/Import Tool	Microsoft® Windows®		Web	
	Export	**Import**	**Export**	**Import**
Microsoft® Excel®	Yes	Yes	Yes	Yes
Lotus 1-2-3®	Yes	Yes	No	No
Lotus WordPro	Yes	No	No	No
CSV	No	No	Yes	Yes
Microsoft® Word	Yes	No	Yes	No

The configuration programs are considered complimentary to other data loading methods used with JD Edwards EnterpriseOne. Based on the volume of data, source system, types of changes required, and other factors, customers can use one or more of the following methods to import data into JD Edwards EnterpriseOne:

- Batch processing (Z tables)
- Custom table conversions
- Manual data additions
- Supported EDI transactions

- Existing spreadsheet uploads
- Custom SQL logic

Overview of Configuration Programs for Task Views

You can use the Configuration Utilities program (P01RS01) to launch the Task Views program (P01RS002), which enables you to expedite the creation of custom task views for a configuration solution. JD Edwards EnterpriseOne task views are a collection of menus, programs, and versions organized for the various business processes of an organization.

The main benefit of the Task Views program is that it enables you to use an existing task view as a template or framework for customizing a new task view. You can load an existing task view in the Task Views program and then export it to a Microsoft® Excel® spreadsheet. Alternatively, you can create a new task view from the beginning by using the Task Views program.

When you finish customizing the task view in the spreadsheet, you can import the task view records that are in the spreadsheet back to the Task Views program and then save the new task view in JD Edwards EnterpriseOne.

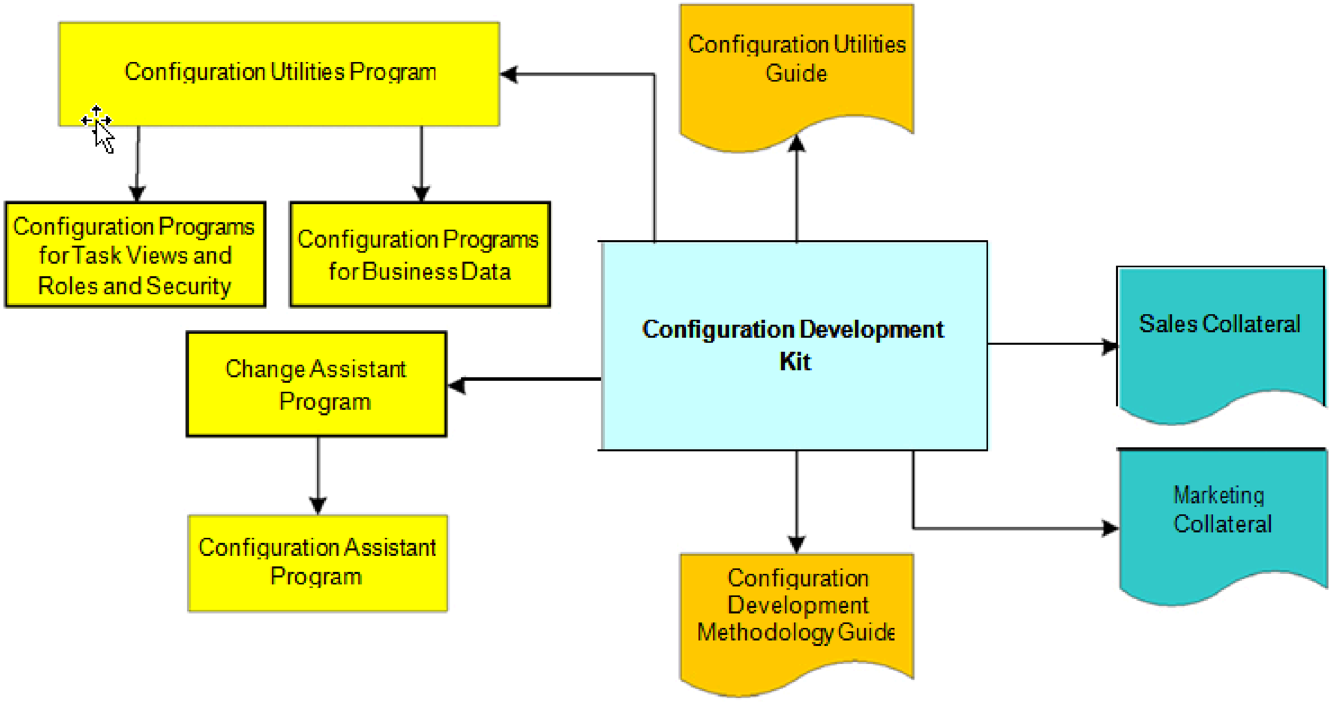
Overview of Configuration Program for Version Reporting

You can use the Configuration Utilities program to launch the Version Reporting program (R01RS005) to compare and analyze the following:

- Processing option settings in different versions of an interactive program
- Processing option and data selection settings in different versions of a batch program

Overview of Configuration Development Kit

Configuration programs are part of the Configuration Development Kit (CDK), as shown in this illustration:


Configuration Utilities Program
Configuration Utilities Guide
Configuration Programs for Task Views and Roles and Security
Configuration Programs for Business Data
Configuration Development Kit
Sales Collateral
Change Assistant Program
Marketing Collateral
Configuration Assistant Program
Configuration Development Methodology Guide

2 Exporting and Importing Business Data

Overview of the Export and Import Process for Business Data

The configuration programs enable you to export large amounts of business data at the same time from a table in the JD Edwards EnterpriseOne system to a Microsoft® Excel® spreadsheet. Using the spreadsheet, you can review the data and add, revise, and delete records as required. If you do not have existing business data as a starting point, you can use the configuration programs to export a blank template of a table and then add business data in the spreadsheet. Typically, when you export business data to a spreadsheet, you save it to a local environment or server.

The configuration programs also enable you to import data from a spreadsheet to the corresponding tables in the JD Edwards EnterpriseOne system. In combination, the export and import functionalities are integral to setting up your business data quickly and accurately during the initial setup phase of an implementation.

> **Note:** The export and import process can be completed in reverse. That is, you can begin the initial process with a spreadsheet (no data exists in the table), import the data to a configuration program, and save the data to the table instead of exporting existing data from the table to the spreadsheet.

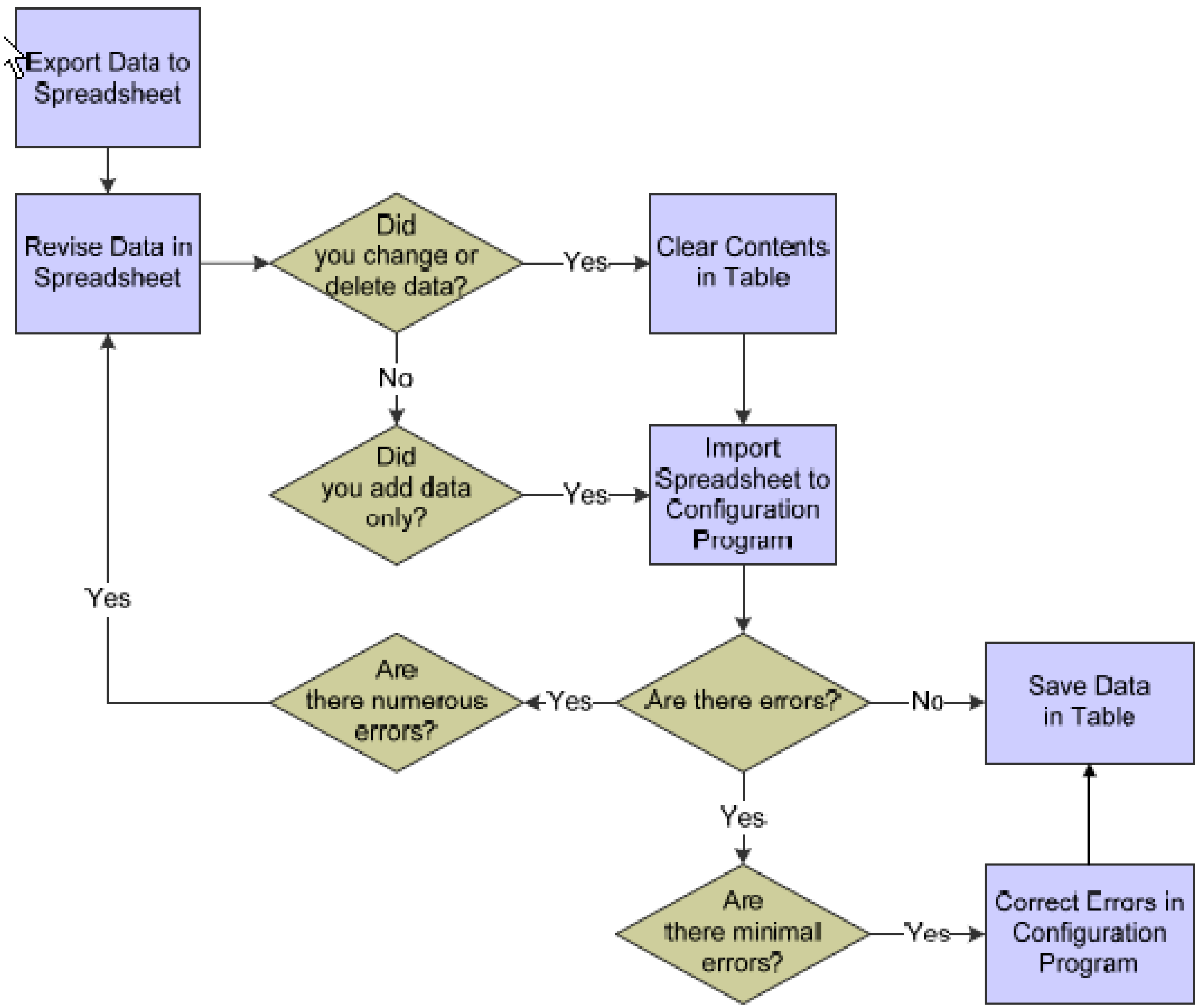
You can revise business data in a spreadsheet or configuration program. You can add business data records, as well as change and delete existing data and correct any data that the configuration program found in error. Most customers use the configuration programs for minor revisions and the spreadsheets for major revisions. The spreadsheet provides an easy format in which to manipulate large amounts of data.

Before you import the data from a spreadsheet to a configuration program, determine whether data already exists in the table for the environment. If data already exists in the table and you change or delete existing data in the spreadsheet, you must clear the contents of the table before you import the data to the configuration program. (See *Overview of Clearing the Contents of a Table topic*). If you intend to add data only during the import process, you do not have to clear the table.

When you import the data from a spreadsheet to a configuration program, the program displays the imported data, validates the data, and highlights any errors. If you have a minimal number of errors, correct them in the configuration program. Otherwise, correct the errors in the spreadsheet and then import the data back to the configuration program.

Continue the iterative process of exporting and importing data until you are satisfied with the data that exists in the JD Edwards EnterpriseOne table. You cannot save data to a table until all errors are corrected.

The following graphic shows the export and import process, from exporting data to a spreadsheet to importing the data and saving it in a table:



Note: The amount of time that is required to export and import data varies with the volume of business data. The import process takes longer than the export process because the system validates the imported data. The maximum number of records that can be imported or exported depends on the memory size of the PC or server. The configuration programs will lock if there is not enough memory to handle the import and export of data, and you will need to export and import the data in more than one pass.

Before beginning the export and import process, business partners must determine which country- specific business data is closest in configuration to the country for which they are developing a configuration solution. To minimize the number of required revisions, use the business data for that country as the starting point for the configuration solution.

Exporting Business Data from a Configuration Program

This topic describes how to:

- Export Business Data from a Configuration Program
- Export to a New Workbook (spreadsheet)
- Export to an Existing Workbook (spreadsheet)

> **Note:** For illustration purposes, the steps in this task show the initial form that is displayed when you export data for business units in a Microsoft® Windows® environment. The steps are the same for the six application configuration programs.

Exporting Business Data from a Configuration Program

1. Enter **P01RS01** in the Fast Path.
2. On the Configuration Utilities form, select the Business Data tab and then select the type of business data that you want to set up and configure.

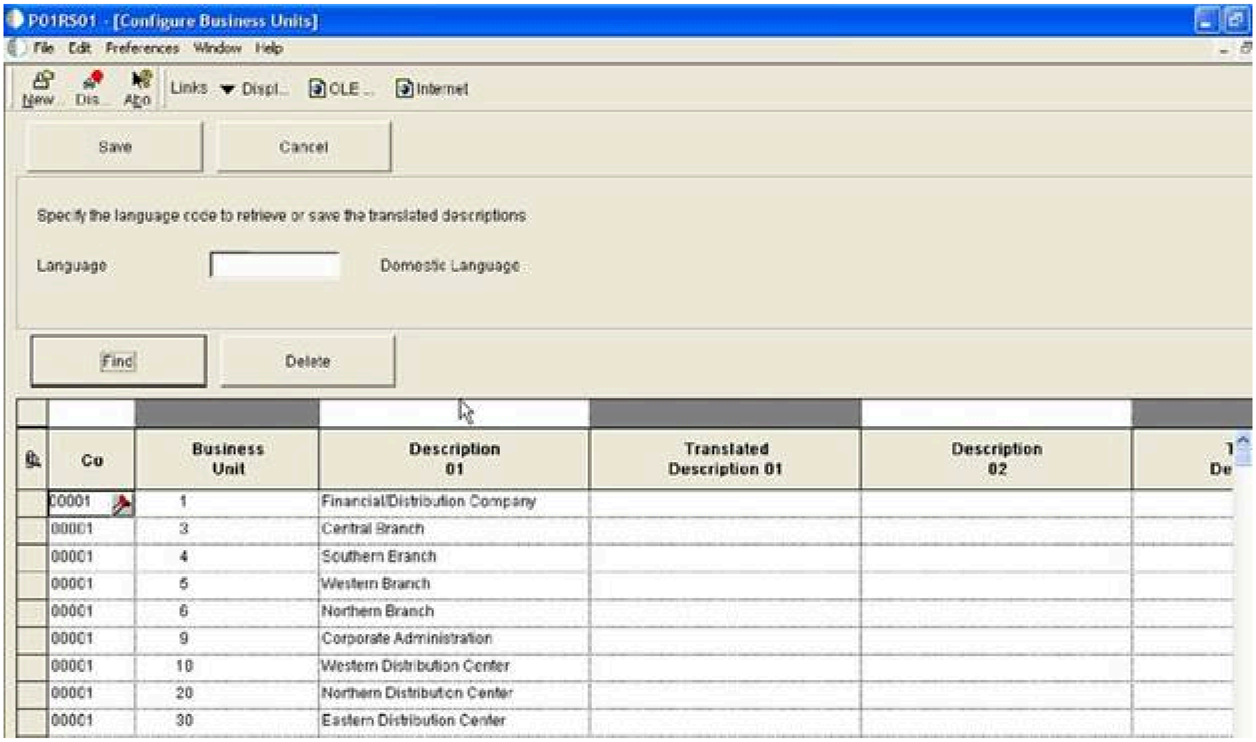
   For business units, accounts, and Financial AAIs, continue to step 3. Otherwise, continue to step 4.
3. On the <name of configuration> form, do one of the following:

   Enter a code from UDC 01/LP in the Language field. If you have translated descriptions, this field is required.

   Leave the Language field blank if descriptions are in your domestic language only.

4. On the <name of configuration> form, click Find to view the data.

   If applicable, the form displays translated descriptions for the language identified in step 3.



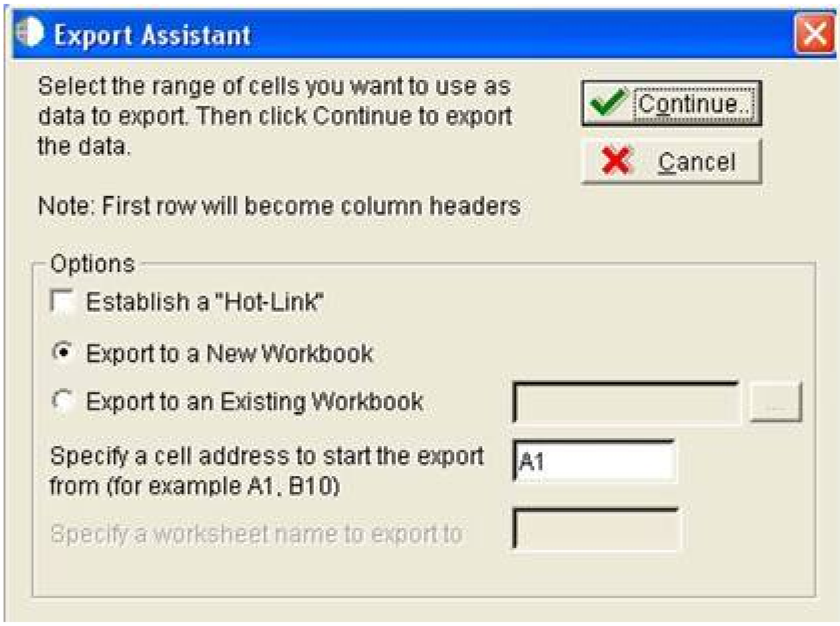
5. In the grid, select and highlight all rows.

   You can select and highlight a range of rows; however, JD Edwards recommends that you select all rows when you configure business data based on a country-specific configuration solution.

6. To export data:

    - (Windows) Right-click in the grid, select Export and then Microsoft® Excel®.
    - (Web) Click the up arrow that is on the right side of the form above the grid.

    Although there are four formats available, only Microsoft® Excel® and Lotus 1-2-3 have both export and import capabilities.



7. Under Options:

    - If you select Export to a New Workbook, complete steps 8 through 13.
    - If you select Export to an Existing Workbook, complete steps 14 through 21.

8. **Export to a New Workbook (spreadsheet)**

    On the Export Assistant form, select the Export to a New Workbook option.
9. Specify the spreadsheet cell in which to begin the data export.

    The default value A1 begins with the column headings in A1 and the data in A2.
10. Click Continue.

    The system creates a spreadsheet with the name Book1 and loads the data into Sheet2.
11. Add, revise, and delete data, as required.
12. From the File menu in the spreadsheet, select Save As and enter a new file name.
13. Keep track of the location of the saved file so that you can easily retrieve the file when you import the data.
14. **Export to an Existing Workbook (spreadsheet)**

    On the Export Assistant form, select the Export to an Existing Workbook option.
15. Enter the path for the existing spreadsheet or click Browse and locate and select the file.
16. Specify the spreadsheet cell in which to begin the data export.

    The default value A1 begins with the column headings in A1 and the data in A2.
17. Specify a worksheet name.

When you export data, the system loads the data in Sheet2. If you do not want to override the existing data, specify a different worksheet name, such as Sheet3 or Sheet4.

18. Click Continue.

    The system loads the data in the worksheet that you specified in the previous step.
19. Add, revise, and delete data, as required.
20. Save the spreadsheet.
21. Keep track of the location of the saved file so that you can easily retrieve the file when you import the data.

Adding and Revising Translated Descriptions

The data for business units, accounts, and Financial AAIs contains fields for translated descriptions. Translated descriptions are stored in the F0006D (business units), F0901D (accounts), and F0012D (Financial AAIs) tables.

The following table describes when you can use the configuration program and the spreadsheet to add and revise translated descriptions:

Configuration Program	Spreadsheet
If business data for the translated descriptions already exists in the primary table (F0006, F0901, or F0012), you must use a configuration program to: • Add translated descriptions for a new language. • Revise existing translated descriptions.	If business data for the translated descriptions already exists in the primary tables, you cannot use a spreadsheet to add translated descriptions for a new language or to revise existing translated descriptions. If business data for the translated descriptions exists, the configuration program will issue duplicate key errors during the import process.
You can use the configuration program to add translated descriptions for a new language. On the <name of configuration> form, enter a code in the Language field and click Find. Add translated descriptions for a new language or revise existing translated descriptions in the Translated Description 01 and Translated Description 02 fields. Save the data.	If you begin the initial import and export process with a spreadsheet (business data does not yet exist in the primary table), you can use the spreadsheet to add translated descriptions for a new language. Add the translated descriptions in the spreadsheet and then import them to the configuration program. On the <name of configuration> form, the program displays the translated descriptions. Enter the code for the new language in the Language field and click Save.

If one translated description line fails during the import process, the configuration program does not load any translation descriptions.

Overview of Clearing the Contents of a Table topic

This section provides an overview of clearing the Contents in a Table, and describes how to perform the task of clearing the contents.

If you export and import data in the same environment, you might need to clear the contents of a JD Edwards EnterpriseOne table before you import the data. When you import data from a spreadsheet to a configuration program, the program adds the data to a table; it does not override the existing data in a table. Therefore, if you revise existing records in a spreadsheet and try to import the data, the system will issue duplicate key errors because the records already exist. You must clear the contents of the table before you import the data. If you only add records to the spreadsheet, you do not have to clear the table before you import the data.

To clear the contents of a table

1. Enter **P01RS01** in the Fast Path.
2. On the Configuration Utilities form, select the Business Data tab and then select the type of business data that you want to clear from a table.
3. On the <name of configuration> form, click Find to display the records in the table.
4. Depending on the environment, do one of the following:
    - For Microsoft® Windows®, select all of the rows in the grid and click Delete.
    - For the Web, select the check box that is located on the left of the column headings (this selects all records) and click Delete.
5. In the message window, click OK to confirm that you want to delete the selected items.

Importing Business Data from a Spreadsheet to a Configuration Program

This section lists a prerequisite, and describes how to import data from a spreadsheet to a configuration program.

For illustration purposes, the steps in this task show the initial form that is displayed when you import data for business units in a Microsoft® Windows® environment. The steps are the same for the six application configuration programs.

Prerequisite

Clear the contents of the table, if applicable. See *Overview of Clearing the Contents of a Table topic*.

To import data from a spreadsheet to a configuration program

1. Enter **P01RS01** in the Fast Path.
2. On the Configuration Utilities form, select the Business Data tab and then the type of business data that you want to import.
3. To import data, on the <name of configuration> form:
    - (Windows) Right-click in the grid, select Import and then Microsoft® Excel®.
    - (Web) Use the down arrow that is on the right side of the form above the grid.
4. In the Open window, locate the spreadsheet to import and enter the file name.
5. Under Import Options:
    - Specify a range of cells to import (For example, A1:B10): Enter the beginning and ending cells of the data in the spreadsheet, separated by a colon. For the beginning cell, enter A2 (to accommodate the column headings in the spreadsheet, which begin with A1).
    - Specify a worksheet name to import from: Enter Sheet2 (the system exports data to Sheet2 in the spreadsheet) and click Open.

The system imports the data, displays it on the form, verifies the record counts, and highlights any errors.

6. For translated descriptions, see *Adding and Revising Translated Descriptions*.
7. If error messages exist on the <name of configuration> form, do one of the following:
   - If there are minimal errors, correct them on the configuration form.
   - If there are numerous errors, correct the errors in the spreadsheet and then import the data to the configuration program.
8. On the <name of configuration> form, click Save to update the data in the corresponding table. The system does not save any data until all errors are corrected.

3 Configuring Business Data

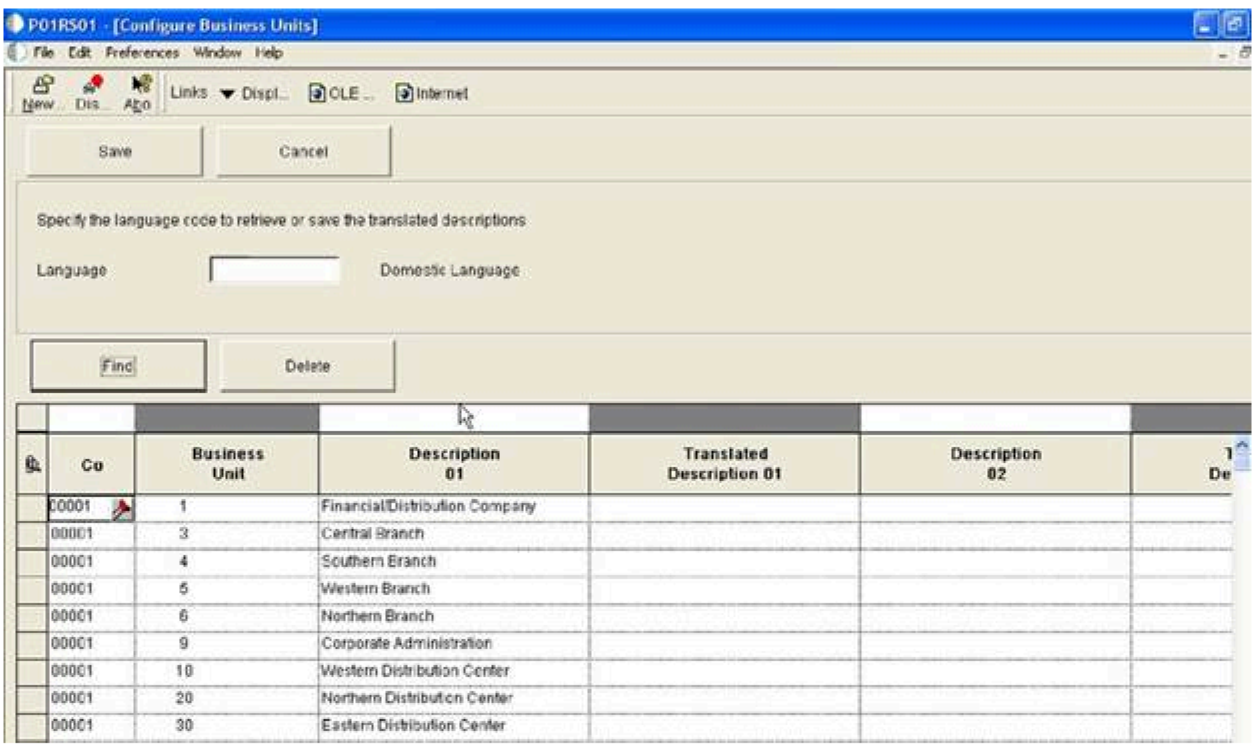
Overview of Configure Business Units

> **Note:** You must set up and configure business units, accounts, and Financial AAIs in a sequential order because of data dependencies.

For specific instructions on how to export and import business data, see *Overview of the Export and Import Process for Business Data*.

The Configure Business Units program (P01RS006) is based on the Review and Revise Business Units program (P0006) that is available in the standard JD Edwards EnterpriseOne software. The Review and Revise Business Units program performs functional data validation. Unlike the Review and Revise Business Units program, the Configure Business Units program enables you to export volumes of data from both the F0006 and F0006D tables to a Microsoft® Excel® spreadsheet and does not restrict the data to business units within the same company. Additionally, you can add and revise data in the spreadsheet and, after clearing the contents in the table if applicable, import the data to the configuration program. When error-free, you can save the data to the tables.

The following graphic illustrates the Configure Business Units form.



The Configure Business Units form includes two fields for translated descriptions in one alternate language. To enter languages on this form, see *Adding and Revising Translated Descriptions*.

Alternatively, you can use the Review and Revise Business Units program for language translations.

Overview of Configure Accounts

The Configure Accounts program (P01RS901) is based on the Review and Revise Accounts program (P0901) that is available in the standard JD Edwards EnterpriseOne software. The Review and Revise Accounts program performs functional data validation. Unlike the Review and Revise Accounts program, the Configure Accounts program enables you to export volumes of data from the F0901 and F0901D tables to a spreadsheet.

Additionally, you can add and revise the data in the spreadsheet and, after clearing the contents in the table if applicable, import the data to the configuration program. When error-free, you can save the data to the tables.

The Configure Accounts program includes a field for translated descriptions for one alternate language. To enter languages on this form, see *Adding and Revising Translated Descriptions*.

Overview of Configure Financial AAIs

The Configure Financial AAIs program (P01RS012) is based on the Automatic Accounting Instructions program (P0012) that is available in the standard JD Edwards EnterpriseOne software. The Automatic Accounting Instructions program performs functional data validation. Unlike the Automatic Accounting Instructions program, the Configure Financial AAIs program enables you to export volumes of data from the F0012 and F0012D tables to a spreadsheet. Additionally, you can add and revise data in the spreadsheet and, after clearing the contents of the table if applicable, import the data to the configuration program. When error-free, you can save the data to the tables.

The Configure Financial AAIs program includes two fields for translated descriptions in one alternate language. To enter languages on this form, see *Adding and Revising Translated Descriptions*.

Alternatively, you can use the Automatic Accounting Instructions program for language translations.

Overview of Configure Order Activity Rules

The Configure Order Activity Rules program (P01RS204) is based on the Order Activity Rules program (P40204) that is available in the standard JD Edwards EnterpriseOne software. The Order Activity Rules program performs functional data validation. Unlike the Order Activity Rules program, the Configure Order Activity Rules program enables you to export volumes of data from the F40203 table to a spreadsheet. Additionally, you can add and revise the data in the spreadsheet and, after clearing the contents of the table if applicable, import the data to the configuration program. When error-free, you can save the data to the F40203 table.

Overview of Configure Order Line Types

The Configure Order Line Types program (P01RS205) is based on the Order Line Types program (P40205) that is available in the standard JD Edwards EnterpriseOne software. The Order Line Types program performs functional data validation. Unlike the Order Line Types program, the Configure Order Line Types program enables you to export volumes of data from the F40205 table to a spreadsheet.

Additionally, you can add and revise the data in the spreadsheet and, after clearing the contents in the table if applicable, import the data to the configuration program. When error-free, you can save the data to the F40205 table.

Overview of Configure Manufacturing and Distribution AAIs

The Configure Manufacture and Distribution AAIs program (P01RS950) is based on the Automatic Accounting Instructions program (P40950) that is available in the standard JD Edwards EnterpriseOne software. The Automatic Accounting Instructions program performs functional data validation. Unlike the Automatic Accounting Instructions program, the Configure Manufacturing and Distribution AAIs program enables you to export volumes of data from the F4095 table to a spreadsheet. Additionally, you can add and revise the data in the spreadsheet and, after clearing the contents in the table if applicable, import the data to the configuration program. When error-free, you can save the data to the F4095 table.

The Configure Manufacturing and Distribution AAIs program includes a processing option that specifies whether to disable the Cost Type column in the grid.

4 Creating Custom Task Views

Understanding the Export and Import Process for Task Views

The Task Views program (P01RS002) combines the functionality of the standard JD Edwards EnterpriseOne applications that are used to set up task views and enables you to perform these related functions:

- Create new roles.
- Add translated task descriptions for up to two languages.
- Add a base level of security for applications.

You can load an existing task view in the grid of the Task Views program (P01RS002) and then export it to a spreadsheet to use as a template for a new task. An existing task view contains an average of 1200 records, which can be extremely difficult to manage in the grid. Therefore, revising the existing records in a spreadsheet makes the process of creating a new task view more efficient. Optionally, you can export an empty grid to the spreadsheet and add data in the spreadsheet.

Although it is not recommended, you can create a new task view from the beginning by adding records directly in the grid of the Task Views program.

> **Note:** You can only use the Task Views program to create new task views. If you revise an existing task view in the Task Views program, the system issues an error message because of duplicate records. Instead, you must use the standard programs in JD Edwards EnterpriseOne Solution Explorer to revise an existing task view. This approach is recommended when you have minor revisions to the task view.

If you create a new task view based on an existing one, ensure that you assign a unique task ID and name to the task view when you import the data from the spreadsheet to the Task Views program. If you use the same task view name, the system issues an error message because of duplicate records.

During the export process, the system exports all of the column headings for the task view into the spreadsheet. In the spreadsheet, you enter the name of the task in the appropriate column and then complete the additional columns in the row to associate an application, version, form, roles, and so on, to the task.

After you add new task view records or revise existing records in the spreadsheet, you can import the records back to the Task Views program. During the import process, the system verifies that all data in the spreadsheet exists in JD Edwards EnterpriseOne and generates errors when data is not recognized. You can revise the records directly in the grid of the program and save the task view or, if you have numerous revisions, correct the errors in the spreadsheet and import the spreadsheet again.

When you save the new task view, the Task Views program adds the task view data from each column to the appropriate JD Edwards EnterpriseOne tables that contain records for task views, menus, tasks, task relationships, versions, and roles. If the role *PUBLIC does not exist, the system generates security records for *PUBLIC that removes security for all roles. The program then grants security back to the roles, based on the programs to which they are assigned on the task view.

The Task Views program applies a base level of application security to the roles associated with each task. The security only applies to the initial application form that is launched from the task or menu. When users try to access other forms from the initial form, they will be denied access. Therefore, after you save the task view in the Task Views program, you must use Security Workbench (P00950) to apply additional application security to roles to ensure that users can access the necessary forms.

Error Messages

This table includes examples and descriptions of error messages:

Error Message	Description
Invalid Role Error	This error occurs after you add new roles in the spreadsheet and then import them to the Task Views program. The system highlights the roles in the grid of the Task Views program and allows you to add the roles by adding a description for each role and saving the task view. This error also occurs if a role is misspelled or if the role is in error. Correct the error or remove the role, as applicable.
<User name> exists as a user	This error occurs when you enter a user name as a role instead of entering the role name.
Invalid Relationship in Task View	This error occurs if one or more records are missing corresponding records in the task view. For example, you might receive this error if you have a relationship record in the F9001 table but do not have a corresponding task record in the F9000 table. The jde.log contains detailed information about the records that are in error.
Invalid Object or Object Type	This error occurs when the object that you enter does not match the object type.

Understanding Task View Data

The columns in the grid of the Task Views program (P01RS002) contain the data for each task in a task view. This table describes the columns in the grid:

Column	Description
Task Name Level (1-5)	Five separate columns for entering up to five levels of tasks to create parent-child task relationships. You can enter only one level for a row.
Task Name Translation 1	A translation of the task name for Language 1.
Task Name Translation 2	A translation of the task name for Language 2.
Task Type	A code that identifies whether the task is an interactive or batch application or a folder.
Task Type (Description)	A description of the code entered for the Task Type.
Object Name	The object name of the interactive or batch application.

Column	Description
Form Name	The form that the system displays when the application is launched from the menu or task. Leave this field blank if you want the system to launch the default entry form for the application.
Version	A particular version of an application. Versions can contain a set of processing options and data selection for an interactive or batch application.
Opt Cd (option code)	A code that specifies whether the user is prompted for additional information before launching the application. Values include: 0: No processing options 1: Blind execution 2: Prompt for version 3: Prompt for values 4: Prompt for data selection 5: Prompt for data selection and values
Option Code (Description)	A description of the option code.
Product Code	A code from UDC table 98/SY that identifies a system in JD Edwards EnterpriseOne, for example: 01: Address Book 11: Multi-Currency 42: Sales Management
Product Code Reporting	A code from UDC table 98/SY that specifies the system number for reporting purposes.
Role (1-20)	Twenty separate columns for associating up to 20 roles per task.

Setting Processing Options for Task Views (P01RS002)

You use processing options to specify default processing information for a program.

Use these processing options to set the default processing for the Task Views program (P01RS002). To set the processing options, access the Interactive Versions program (P983051).

Defaults Tab

Access the Defaults tab.

Processing Option	Description
1. Language 1	Define a language code for task translations.
2. Language 2	Define a language code for an additional task translation.
3. Model Role	Specify a model role to use as a basis for creating new roles. The system copies the role information from the User Profile Revisions table (F0092) and applies it to new roles added to the system.
4. Task Prefix	Specify a task prefix to use when the system generates a unique task ID. All new tasks created with this program will begin with the value of the prefix that you enter here. The system uses the prefix with a next number to generate a task ID. If you leave this processing option blank, the system uses only the next number as the unique task ID.
5. Show Folder Roles	Specify whether the system displays the roles associated with the folders. If you leave this processing option blank, the system does not display the roles associated with the folders.

Process Tab

Access the Process tab.

Processing Option	Description
1. Business Accelerator Configuration	Specify whether the task view is for a Business Accelerator configuration. Values are: Blank: The task view is not for a Business Accelerator configuration. *1*: The task view is for a Business Accelerator configuration. The Task Views program enables you to enter region and industry codes for the task view name. The system combines these codes with a numeric value to automatically generate a name for a task view.
2. Advanced Save	Leave this processing option blank. This processing option is used for Oracle internal testing purposes only and displays separate buttons for saving individual components of a task view. This is not applicable to customers.
3. Display Business Accelerator Configuration on Entry	Specify whether the system launches the Set Business Accelerator Task View Name form when you add a task view to the system. The system ignores this processing option if the Business Accelerator Configuration processing option is blank (not enabled). Values are: Blank: The system does not launch the Set Business Accelerator Task View Name form. *1*: Launch the Set Business Accelerator Task View Name form when adding a new task view in the Task Views program. The form enables you to specify the region and industry codes that the system uses to generate a task view name for a Business Accelerator configuration solution.

Processing Option	Description
4. Default User	Specify a user profile to which any new roles are assigned. The user profile Rapid is currently set up for all roles that are used in a Business Accelerator configuration. If you leave this processing option blank, the system creates the new role records, but does not assign them to a user profile. You must assign the roles manually using the User Profile Revisions program.

Exporting Task Views by Task

You can load an existing task view in the grid of the Task Views program (P01RS002) and export it to a spreadsheet to use as a template for a new task. This method is preferred because it is easier to revise an existing task view than create a new task view. Alternatively, you can export an empty grid to the spreadsheet and add records.

This section describes how to:

- Export an existing task view to a spreadsheet.
- Export an empty task view grid to a spreadsheet.

> **Note:** You cannot export task view 91, which is the JD Edwards EnterpriseOne Tools menu.

To export an existing task view to a spreadsheet:

1. Enter **P01RS01** from the Fast Path field.
2. On the Configuration Utilities form, go to the Control/System Data tab, and select the Task Views link.
3. On the Search for Task Views form, click Find.
4. Select a task view and click View by Task.

   The system loads all of the records from the task view into the grid on the View Task View form.
5. Review this information about the Show Folder Roles check box:

   > **Note:** You can associate roles with folders in the task view. The folders are not tasks, but are placeholders for groups of child tasks. By default, this check box is not selected when you access the View Task View form. If you export the task view without the roles at the folder level, the spreadsheet is easier to work with.

6. On the View Task View form, right-click in the grid, select Export and then Microsoft® Excel®.
7. Highlight the records in the grid that you want to export.
8. On the Export Assistant form, click Continue.

Web Environment

In a Web environment, click the up arrow on the right side of the form above the grid.

The system exports all of the records from the task view grid into a Microsoft® Excel® spreadsheet. A typical task view contains about 1200 records; therefore, it might take a few minutes for the system to load it to the spreadsheet.

1. From the File menu in the spreadsheet, select Save As and enter a new file name.
2. Keep track of the location of the saved file so that you can easily retrieve the file when you import the data.