

JD Edwards EnterpriseOne Tools

Configuration Assistant User's Guide

9.2

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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

Documentation Accessibility

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Access to Oracle Support

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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

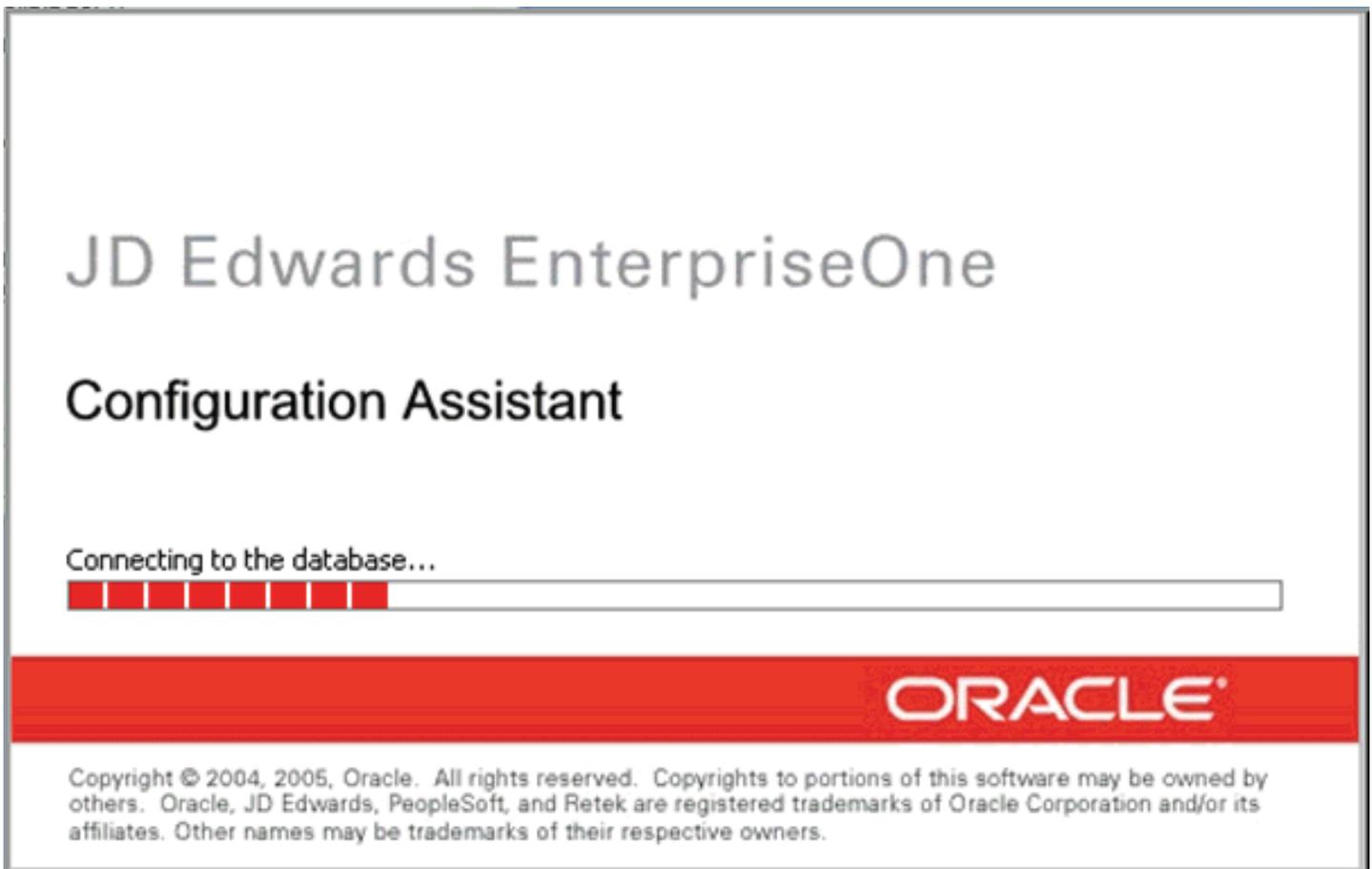
The following text conventions are used in this document:

Convention	Meaning
Bold	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
<i>Italics</i>	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 Welcome to JD Edwards EnterpriseOne Configuration

Overview of the JD Edwards EnterpriseOne Configuration Assistant

The Configuration Assistant is a standalone Java-based tool that allows you to extract a subset of JD Edwards EnterpriseOne configuration information into a portable archive. This data can then be loaded into any other JD Edwards EnterpriseOne environment using Change Assistant.



Tip:

The maximum size of a SQL Server Express (SSE) local database is 4 GB, while there is no limit for an Oracle Enterprise Edition (OEE) local database. As a point of reference, the sample JD Edwards EnterpriseOne configurations are typically less than 100 MB.

In JD Edwards EnterpriseOne Tools Release 8.98 and later, the configuration database is delivered as xml.

Note:

JD Edwards EnterpriseOne Compatibility: The Configuration Assistant tool is compatible with JD Edwards EnterpriseOne Applications Release 8.11 SP1 and later. The tool supports cross-release data configuration imports and exports; however it gives a cross-release warning.

For a description of how Configuration Assistant and Change Assistant are used together to create and distribute the configurations, and how specific machine types are required for each function, see *Packaging and Loading an Extracted File onto a Target Machine*.

CAUTION: On the Microsoft Windows 2008 platform, you must start Configuration Assistant by using **Run as Administrator**. Right-click the shortcut and select **Run as Administrator** from the drop-down list. For details about creating a shortcut for Configuration Assistant, see: *Manually Creating a Shortcut for Configuration Assistant*.

CAUTION:

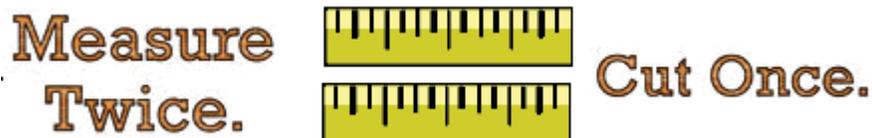
Use careful design analysis as you configure your portable archive in the source environment to ensure that loading it in the target environment (using replace and append) will not cause problems.

When designing data configurations, you should refer to the JD Edwards EnterpriseOne Configuration Development Methodology Guide to ensure that you are adhering to known design constraints and are aware of risks inherent with any data replacement strategy. This guide presents the guidelines you should follow when creating new User Defined Codes (UDCs), Versions, Task Views, or special data types in order to avoid potential conflicts with the base EnterpriseOne data set, and as a result core EnterpriseOne application functionality.

Additionally, you should be aware that some types of configuration data are inherently more risky than others. For example, you should exercise care when dealing with any technical tables, such as Next Numbers. (The system will not execute properly if you include tables associated with Next Numbers, and will fail to take the associated Next Number table.)

Also, generally, you should not include any Control Tables or serialized object tables in your configuration. (You should not include tables from any datasource other than Business Data.)

Configuration designers will do well to consider the axiom of trade craftsmen:



The Configuration Assistant is designed to work with the following specific types of JD Edwards EnterpriseOne configuration information:

- Tables
- Object Management Workbench (OMW) Projects and OMW Objects (requires JD Edwards Tools Release 8.98 or later)
- User Defined Codes
- Security (Public, Roles, and Users)
- Tasks Views
- Versions

The user interface for Configuration Assistant includes a main window and two panes. The left pane displays a tree view of work in process and sample JD Edwards EnterpriseOne configurations that are delivered by default. Each configuration node represents the definition of the contents. After you have completed the definition of a configuration, you use a separate step to actually extract the data and create the portable archive.

This Welcome section also describes these topics:

- *Icons Used by Configuration Assistant*
- *Productivity Hints*

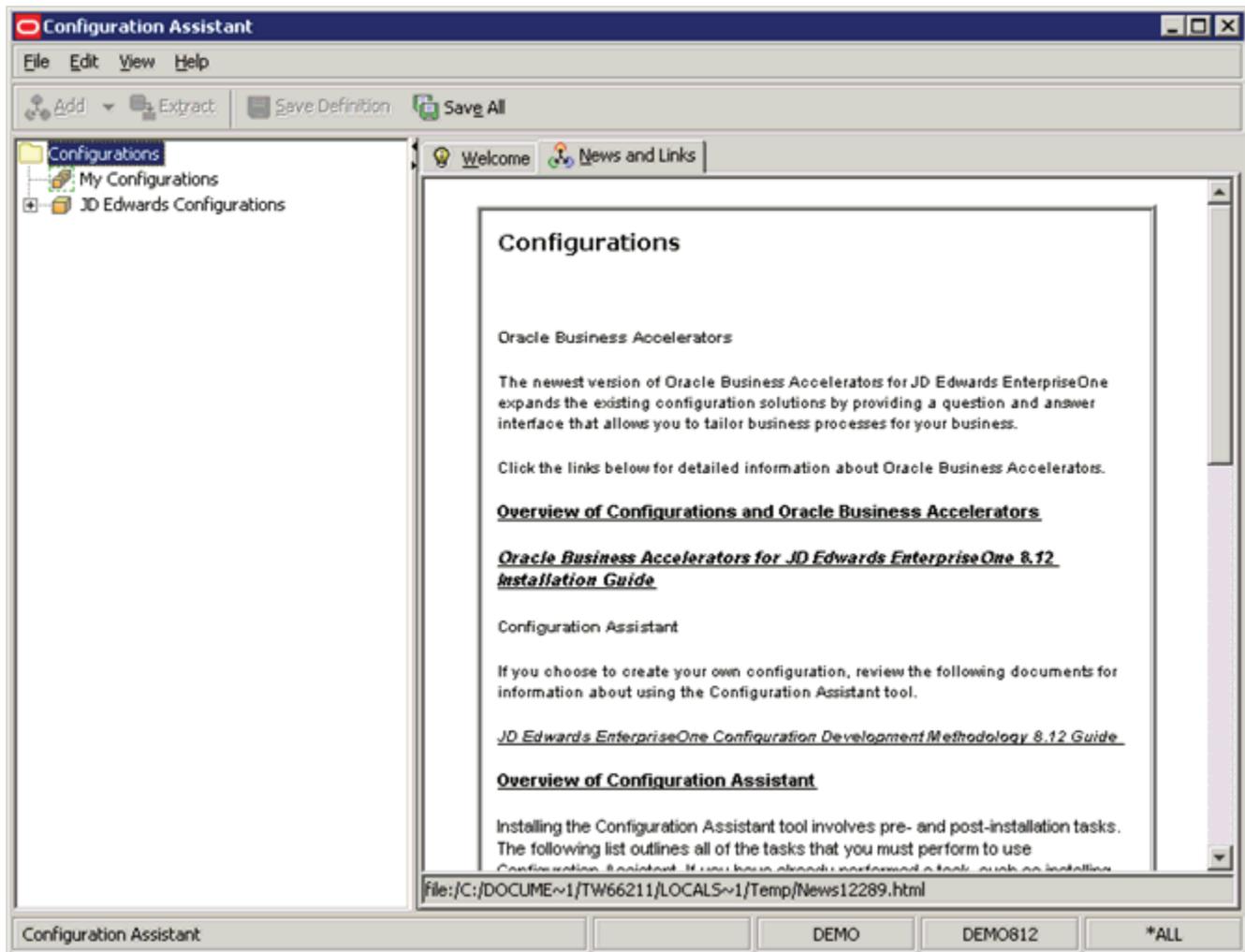
When you start Configuration Assistant, this dialog box is displayed the first time you start the program or if the program has changed and needs to reload a more current version. This dialog indicates the relative progress of loading the Configuration Assistant Java program:



News and Links

The News and Links tab is available when you select the Configurations node and whenever you are connected to Update Center (see *Using the Authentication Tab* in *Using Preferences*). The News and Links tab displays a replica of

the page displayed by Update Center, which is a companion tool to Configuration Assistant. The page contains links to a variety of collateral information such as known issues and workarounds, breaking news, and tips. The linked information is instrumental to the entire Update Center and Configuration Assistant methodology, design, and end-user processes.



Productivity Hints

The Configuration Assistant user interface includes a variety of tools to enhance end-user productivity. These tools include:

- *Adding or Removing Items to Your Configuration*
- *Backing Up Your Target Database Environment*
- *Edit Functions in Specific Nodes*
- *Folder Structure in the Configuration Assistant*
- *Help Tab*
- *Icons Used by Configuration Assistant*

- *Multiple Selects and Deselects*
- *Panes in the Configuration Assistant*
- *Search Drop-Down List - Selecting All*
- *Search Results*
- *Search Strings - Valid Delimiters*
- *Search Strings - Wild Cards*
- *Sorting Within Columns in a Grid*
- *Status Bar*

Adding or Removing Items to Your Configuration

Whenever you select a check box in the right pane to add an item to your configuration, that item is immediately added to your configuration, as displayed in the left pane. Likewise, if you clear a check box in the right pane, the item is immediately removed from the configuration as well as the left pane.

To add an item or remove an item from your configuration (from the tool-populated list of available tables in this data source), select the check box on the left of the item name; this is the first column of the table properties grid.

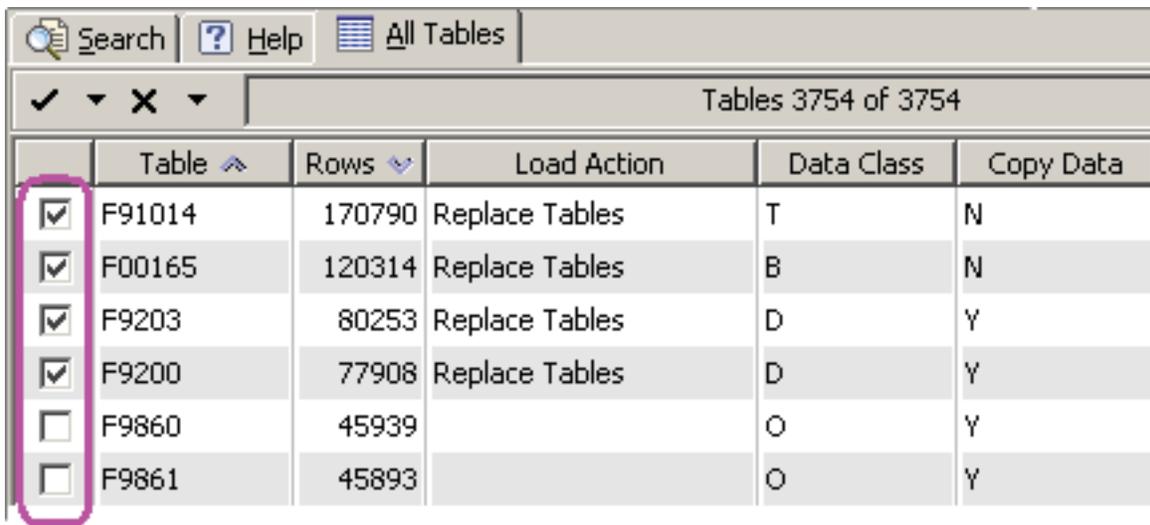


	Table ^	Rows v	Load Action	Data Class	Copy Data
<input checked="" type="checkbox"/>	F91014	170790	Replace Tables	T	N
<input checked="" type="checkbox"/>	F00165	120314	Replace Tables	B	N
<input checked="" type="checkbox"/>	F9203	80253	Replace Tables	D	Y
<input checked="" type="checkbox"/>	F9200	77908	Replace Tables	D	Y
<input type="checkbox"/>	F9860	45939		O	Y
<input type="checkbox"/>	F9861	45893		O	Y

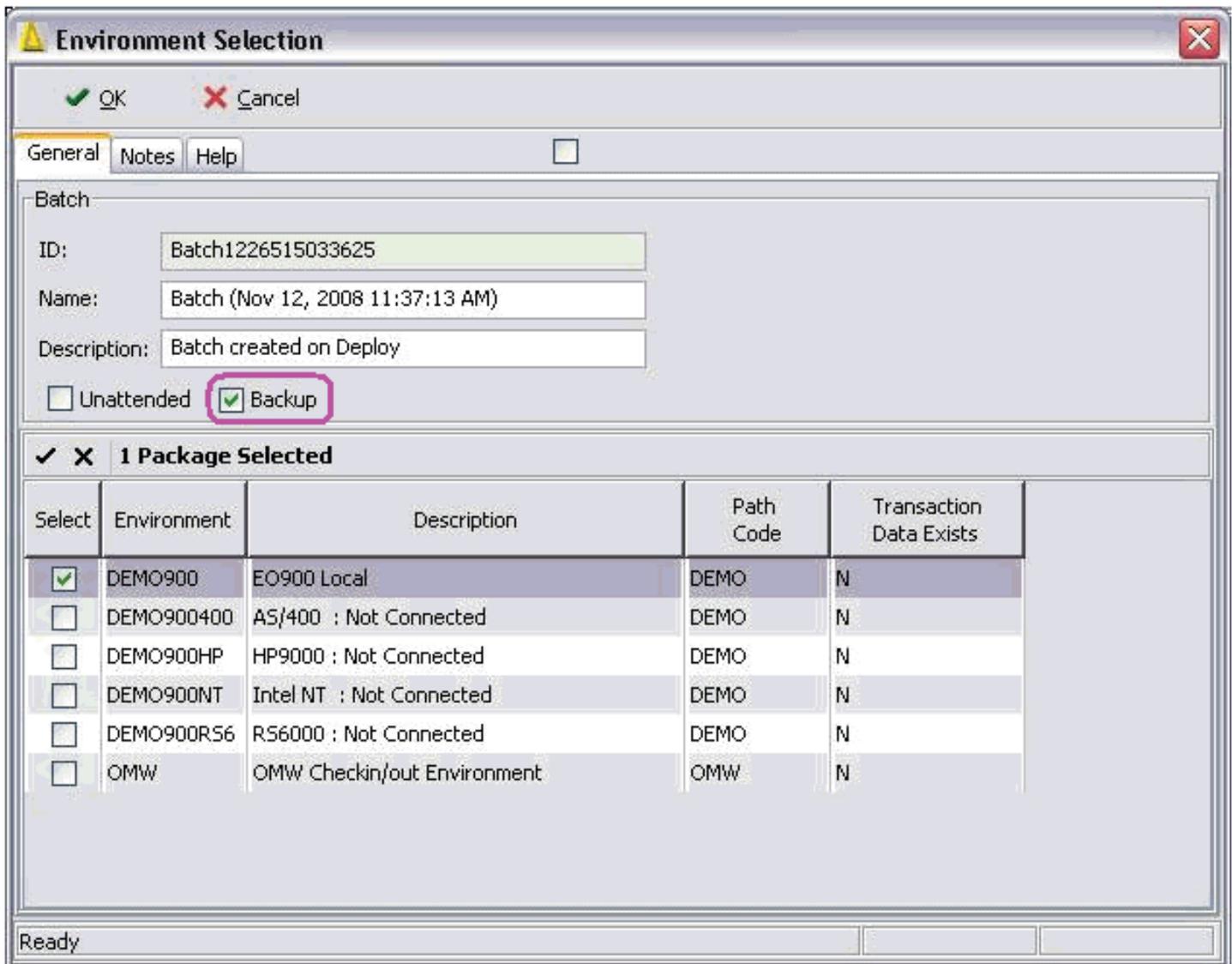
Tip: If you remove a configuration node or specific item from the My Configurations tree structure in the left pane, Configuration Assistant automatically clears the corresponding item in the right pane.

Backing Up Your Target Database Environment

You should always back up your target database environment before performing any process that alters the data, including the loading of an extracted configuration that was created using Configuration Assistant. Unless properly designed and tested, when you are loading data from a configuration, you might overwrite production data.

As shown in the Environment Selection screen below, when you use Change Assistant to deploy an XML package, you can choose to back it up. With the Backup option selected, Change Assistant creates a configuration that mirrors the

configuration that is being loaded and that contains data from the target system. To restore, you can load the backup configuration from Change Assistant.



Edit Functions in Specific Nodes

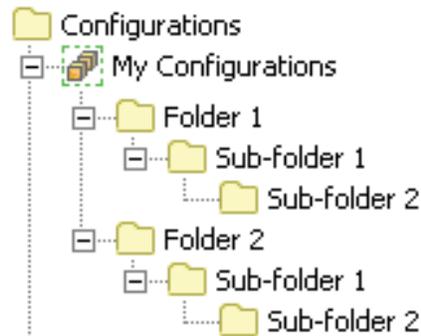
Configuration Assistant logically enables and disables these edit functions within specific nodes:

- Cut
- Paste

- Delete
- Rename

Folder Structure in the Configuration Assistant

In this portion of the tree, configuration definitions are grouped together by using folders and subfolders. You can use folder structures to organize your configurations.



Tip: You can right-click a folder and choose to create a new subfolder, or delete the selected folder.

Note:

- *My Configurations*
- *JD Edwards Configurations*

Help Tab



Within Configuration Assistant, Help is mapped according to three specific nodes:

- *Configurations*
- *My Configurations*
- *JD Edwards Configurations*

Note:

- The topic *Help* in the section: Menu Options.

Configurations

This portion of Help provides overview information and includes a number of productivity hints regarding the user interface of the Configuration Assistant.

When initially selected, the Help for this node maps to the file `welcome.html`. This file name is displayed whenever you click the Back or Next buttons in the Help navigation.



Tip: Click the Home button to return to the beginning of the `Welcome.html` file. To see a complete index of Help topics for Configuration Assistant, use this Home navigation at the bottom of any Help panel:

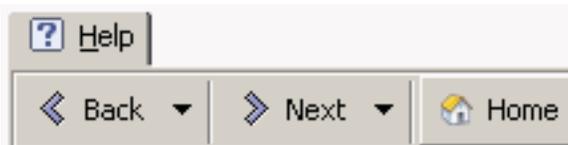


My Configurations

This portion of Help includes a description of My Configurations and includes links to further help for all subnodes:

- Tables
- OMW Projects and OMW Objects (requires JD Edwards Tools Release 8.98 or later)
- User Defined Codes
- Security
- Task Views
- Versions

When initially selected, the help for this node maps to the `MyConfigurations.html` file. This file name is displayed whenever you click the Back or Next buttons in the Help navigation.



Tip: Click the Home button to return to the beginning of the `My_Configurations.html` file. To see a complete index of Help topics for Configuration Assistant, use the Home navigation at the bottom of each help topic.

JD Edwards Configurations

This portion of Help includes a description of JD Edwards Configurations and includes links to further Help for all subnodes:

- Tables
- OMW Projects and OMW Objects

- User Defined Codes
- Security
- Task Views
- Versions

When initially selected, the help for this node maps to the JDE_Configurations.html file. This file name is displayed whenever you click the Back or Next buttons in the help navigation.



Tip: Click the Home button to return to the beginning of the JDE_Configurations.html file. To see a complete index of Help topics for Configuration Assistant, use the Home navigation at the bottom of each help topic.

Icons Used by Configuration Assistant

This list includes the icons used within Configuration Assistant:

- **About**



Indicates that context-specific help is available.

- **Add**



Adds a new item from a list of available items that are logically determined according to the location from which the command is invoked.

- **APPL Object**



Identifies an item as an APPL object within OMW.

- **APPL Version Object**



Identifies an item as an APPL version object within OMW.

- **BL Object**



Identifies an item as a BL object within OMW.

- **BSFN Object**

- 

Identifies an item as a BSFN object within OMW.

 - **BSFN SBF Object**
- 

Identifies an item as a BSFN SBF object within OMW.

 - **BSVW Object**
- 

Identifies an item as a BSVW object within OMW.

 - **Configuration**
- 

• **Copy**
- 

Copies the selected item and places the contents on the clipboard.

 - **Cut**
- 

Cuts the selected item and places the contents on the clipboard.

 - **DD (Data Dictionary) Object**
- 

Identifies an item as a Data Dictionary (DD) object within OMW.

 - **Delete**
- 

Deletes the selected item and places the contents on the clipboard.

 - **Deselect All**
- 

Deselects all check boxes within an array displayed in the right pane.

 - **Document**
- 

Identifies the item as an attached document.

- **DSTR Object**



Identifies an item as a DSTR object within OMW.

- **End User Tasks**



Identifies an item as an end user task.

- **Exit**



Exits a form clicked when the user clicks this icon on the form.

- **Extract**



Extracts the selected package or selected items.

- **Find**



Executes a search for objects based on criteria into the search dialog box, which are either entered by a user or selected from a drop-down list.

- **Folder**



Identifies a node as a folder with no specific attributes known to Configuration Assistant.

- **Folder Open**



Indicates the selected node is an opened folder with no specific attributes known to Configuration Assistant.

- **Help**



Displays help for the selected subject.

- **GT Media Object**



Identifies an item as a GT media object within OMW.

- **JD Edwards Configurations**



Identifies the currently selected item as a default read-only configuration located under the JD Edwards Configurations node.

- **My Configurations**



Identifies the currently selected item as a user-defined configuration located under the My Configurations node.

- **None Exist**



Indicates an error condition for a table. For example, it could indicate a table specification mismatch, that the DD item missing, or that the table does not exist in the datasource to which it is mapped.

- **OK**



Indicates it is OK to accept a selection.

- **OMW Object**



Identifies an item as an OMW object.

- **OMW Project**



Identifies an item as an OMW project.

- **OMW User Defined Code**



Identifies an item as an OMW UDC.

- **OMW User Defined Code Value**



Identifies an item as an OMW UDC value.

- **Paste**



Pastes the current contents of the clipboard at the selected location.

- **Preferences**



Identifies the item selection (from File > Preferences) as preferences for Configuration Assistant.

- **Public**



Indicates an item as containing *PUBLIC records within JD Edwards EnterpriseOne.

- **Public Security Record**



Indicates an item as a *PUBLIC security record within JD Edwards EnterpriseOne.

- **Refresh**



Identifies the Rename function in the file menu Edit > Rename.

- **Rename**



Refreshes and collapses the left pane node display within Configuration Assistant.

- **Role**



Indicates an item as containing roles records within JD Edwards EnterpriseOne.

- **RPDF Object**



Identifies an item as a RPDF object within OMW.

- **Save**



Saves the selected contents from memory to disk.

- **Save All**



Saves all currently unsaved items from memory to disk.

- **Security Data**



Identifies an item as containing security records within JD Edwards EnterpriseOne.

- **Select All**



Selects all check boxes within an array displayed in the right pane.

- **Solution Explorer Relationship**



Identifies an item as a Solution Explorer relationship.

- **Solution Explorer Task**



Identifies an item as a Solution Explorer task.

- **Solution Explorer Variant**



Identifies an item as a Solution Explorer variant.

- **SVCT Object**



Identifies an item as a SVCT object within OMW.

- **Table**



Identifies an item as a JD Edwards EnterpriseOne database table.

- **TBLE Object (existing)**



Identifies an item as an existing TBLE object within OMW.

- **TBLE Object (existing)**



Identifies an item as an existing TBLE object within OMW.

- **Tables**



Identifies items as JD Edwards EnterpriseOne database tables.

- **TBLE Object (existing)**



Identifies an item as an existing TBLE object within OMW.

- **TBLE Object (non-existing)**



Identifies an item as a non-existing TBLE object within OMW.

- **Task Views**



Identifies an item as a task view within JD Edwards EnterpriseOne.

- **UBE Template Object**



Identifies an item as a UBE template object within OMW.

- **UBE Version Object**



Identifies an item as a UBE version object within OMW.

- **User Defined Code (UDC)**



Identifies an item as a User Defined Code (UDC) within JD Edwards EnterpriseOne.

- **User**



Indicates an item as containing user records within JD Edwards EnterpriseOne.

- **Version**



Identifies an item as a JD Edwards EnterpriseOne version.

- **View**



Identifies an item as a view within JD Edwards EnterpriseOne.

- **Welcome**



Identifies the item selection as the welcome for Configuration Assistant.

- **Workflow Object**



Identifies an item as a workflow object within OMW.

- **XMLP Object**



Identifies an item as an XMLP object within OMW.

Multiple Selects and Deselects

You can select or deselect multiple items using the check/uncheck (X) icons that are located at the top of the Tables tab.



Each icon has an associated drop-down list that enables you to perform the batch selection of:

Selects

- Highlighted
- All
- Tables with Data

Tip: The check icon's drop-down list to select Tables With Data instructs the system to calculate the record count on all the tables. Note that this process can take considerable time to complete depending on the extent of the database.

Deselects

- Highlighted

- All
- Tables without Data

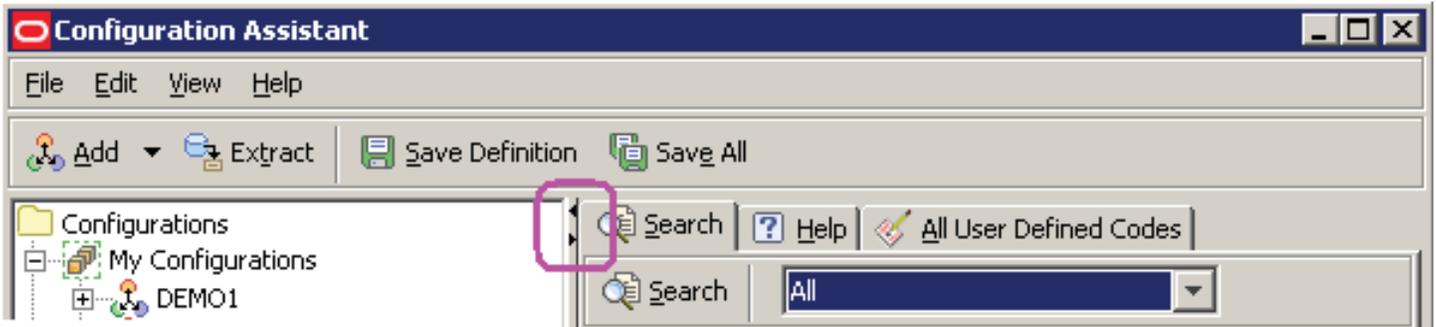
Tip: This selection is temporarily disabled (grayed out) until the counts for the All Tables panel or the Search result panel have been completed and populated.

If this functionality is disabled (that is, the icon group is completely grayed out), it is because the configuration is read-only. For example, all JD Edwards Configurations are set to read-only.

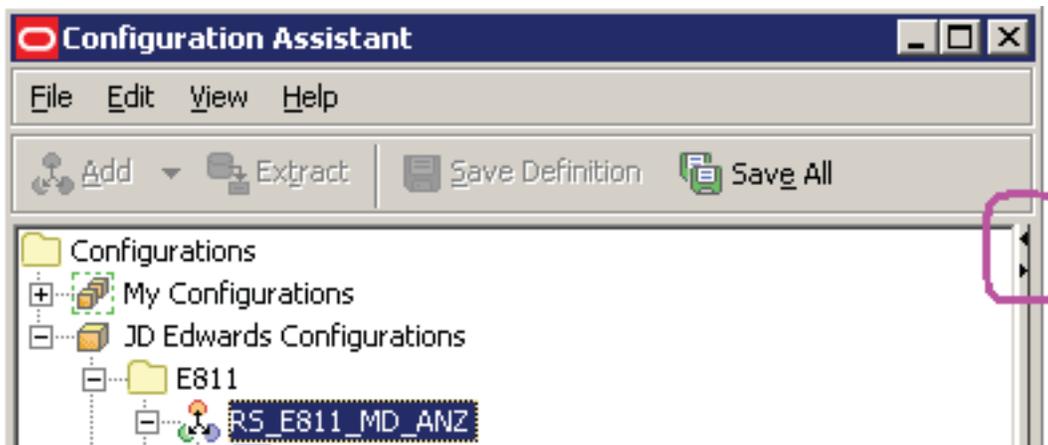
Panes in the Configuration Assistant

The Configuration Assistant allows you to display or hide the right pane of the display.

If the display is showing both panes, to hide the right panel click the lower arrow (right-facing) on the separator bar between the panes.



If the display is showing a single pane, to show the left panel, click the upper arrow (left-facing).



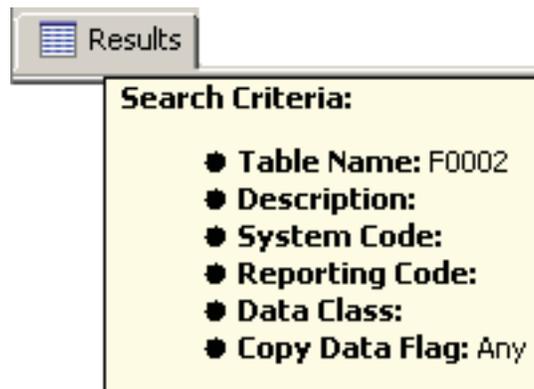
Search Drop-Down List - Selecting All

If you select All from the Search drop-down list, the Configuration Assistant pulls in all items which are defined for the selected node. This does not include transactional data.

Search Results

For each Search that you execute, Configuration Assistant automatically creates and opens a new and separate tab called Results. If you click a node of a different type, and then go back to the previous node, Configuration Assistant recalls the results tabs that were open. This is true whether or not the nodes are in the same configuration. If you do not want to save any search results, you should close them as appropriate. To close a results tab, right-click the tab and select Close Results or Close All Results.

If you hover over a Results tab, the Search criteria of the results are displayed in a flyover panel. For example:



Search Strings - Valid Delimiters

If you manually enter search strings, or if you copy them from any application such as a spreadsheet, then valid delimiters for any search field can include the following characters, either singly or in any combination:

- space character(s)
- comma character(s)
- semicolon character(s)
- tab character(s)

If there are multiple contiguous valid delimiters, the system parses them to a single occurrence. For example, if you enter the search string `table1,,,,,table2`, the system parses the search string as if a single comma delimiter were entered and, assuming the system located the tables, the returned results are displayed as `table1, table2`.

Search Strings - Wild Cards

You can use an asterisk (*) as a wild card to substitute for any character in any position within a search string. However, you cannot use any other operators or Boolean expressions in the search string.

Sorting Within Columns in a Grid

You can sort (in ascending or descending order) the data in the column in a grid by clicking the column heading. To sort multiple columns, hold the control (Ctrl) key and click the column headings.

Tables 3754 of 3754					
	Table	Rows	Load Action	Data Class	Copy Data
<input type="checkbox"/>	F91014	170790		T	N
<input type="checkbox"/>	F00165	120314		B	N
<input type="checkbox"/>	F9203	80253		D	Y
<input type="checkbox"/>	F9200	77908		D	Y

Status Bar

The bottom bar of the Configuration Assistant screen lists helpful status information for the selected node with these segments (from left to right):

- Segment 1: Generally displays the name of the Java-based EnterpriseOne application. In this case, Configuration Assistant.

Note: Exceptions

If you are working on a single new unsaved configuration within My Configurations, when you click Save Definition this element is populated with the phrase *NAME saved*, where *NAME* is the name of your configuration.

If you are working on multiple new unsaved configurations within My Configurations, when you click Save All this element is populated with the phrase *x configurations saved*, where *x* is the number of previously unsaved configurations that were saved.

- Segment 2: Name of the selected configuration.
- Segment 3: Name of the EnterpriseOne user who is currently signed on.
- Segment 4: Name of the EnterpriseOne environment that is currently signed in to.
- Segment 5: Role of the user who is currently signed on.

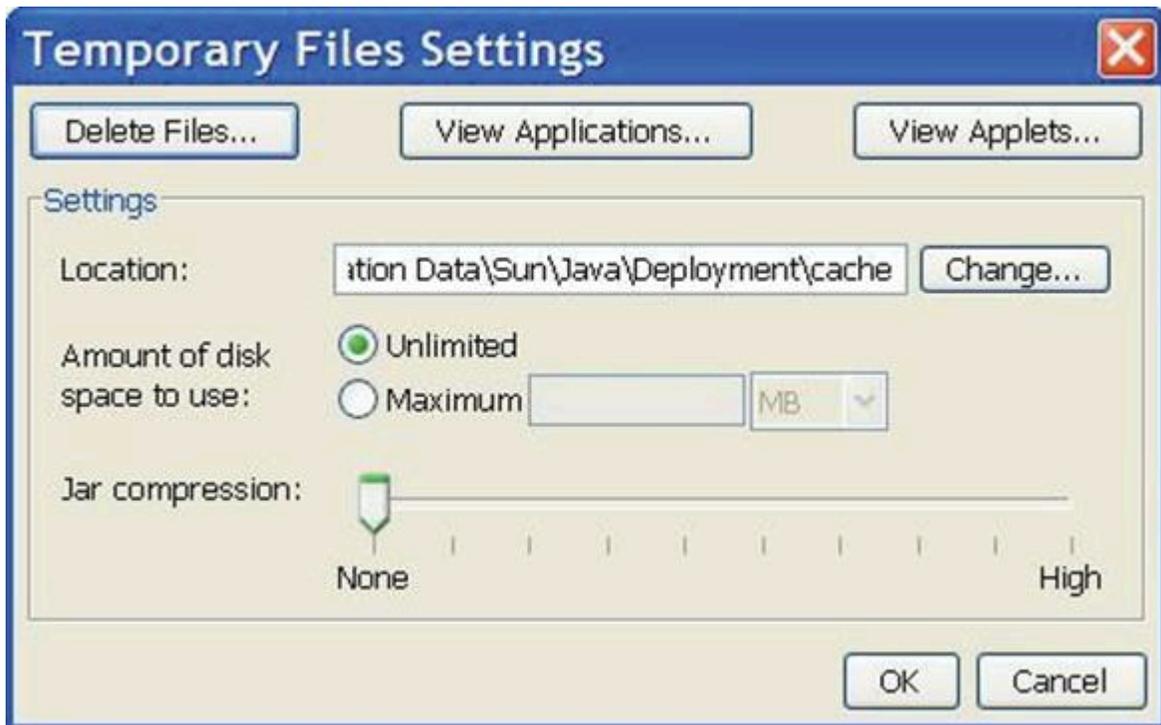
Manually Creating a Shortcut for Configuration Assistant

This topic discusses how to manually create a shortcut for Configuration Assistant:

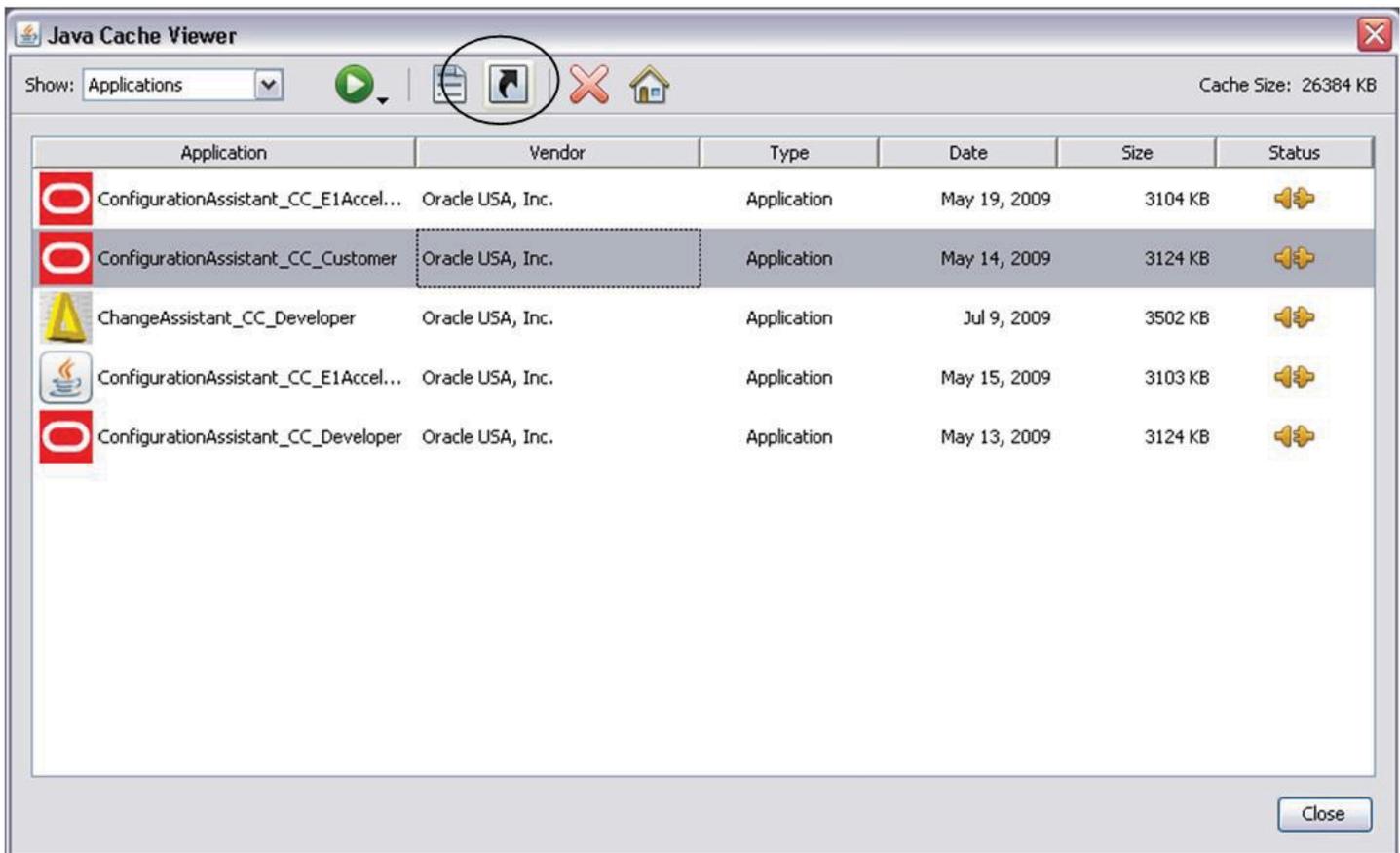
1. In Microsoft Windows, navigate to Start > Settings > Control Panel and double-click the Java icon.



2. On Java Control Panel, on the General tab, in the Temporary Internet Files section, click the Settings... button.



3. On the Temporary Files Settings screen, click the View Applications... button.



4. On Java Cache Viewer, with Configuration Assistant highlighted, click the icon to create a shortcut or from the File Manual select Applications > Install Shortcuts.

2 Menu Options

Menu Options

Configuration Assistant provides these menu options:

- *File*
- *Edit*
- *View*
- *Help*

File

From the File menu, you have the following selections:

- *Adding a New Configuration*
- *Extracting a Configuration*
- *Saving a Configuration*
- *Saving All Configurations*

Adding a New Configuration

CAUTION: You must be within the My Configurations folder in order to add a new configuration.

This section discusses:

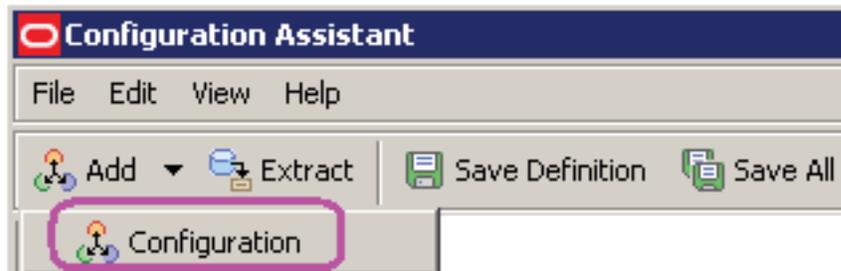
- *Accessing Configuration Properties*
- *Configuration Properties - General Tab*
- *Configuration Properties - Advanced Tab*

Accessing Configuration Properties

To add (create) a new configuration, you must access Configuration Properties by using one of the following three methods, which are functionally equivalent:

1. From the Configuration Assistant toolbar, select File > Add > Configuration.

2. Click the Add button and select Configuration from the drop-down list.



3. In the tree node view in the left pane, highlight and right-click the My Configurations node, and select Add Configuration.



Using any of the preceding three methods, Configuration Assistant displays the Configuration Properties dialog box, which enables you to specify the properties for the configuration that you are adding.

Note:

- *Configuration Properties - General Tab*
- *Configuration Properties - Advanced Tab*

Configuration Properties - General Tab

The screenshot shows a dialog box titled "Add Configuration" with a blue header bar and a red close button in the top right corner. Below the title bar are three tabs: "General" (selected), "Advanced", and "Help". The main area is titled "Configuration" and contains four input fields: "Name:" (text box), "Description:" (text box), "Documentation:" (text box with a magnifying glass icon to its right), and "Deploy To:" (dropdown menu showing "Selected Environment(s)"). At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon. A small empty text box is visible in the bottom right corner of the dialog's frame.

On Configuration Properties, with the General tab selected, complete these fields

- **Name**

Enter a name for your configuration.

CAUTION:

This field is restricted to a maximum of 10 characters, and all characters must be in upper case. You must not use any of these special characters in this field:

```
/~!@#$$%^&()+=[]{ }|\";,:?\\><*.\";
```

Additionally, if you plan on extracting a configuration to a RDB, the name cannot start with a number due to RDB restrictions.

- **Description**

Enter a description for your configuration.

CAUTION: This field can contain a maximum of 30 characters.

- **Documentation**

Optionally, you can attach documentation to be delivered with your configuration. For example, you may want to include some special installation instructions for your configuration in the form of an HTML file. Documentation that is attached using this field will be displayed in the Task Assistant, which should be associated with each task in the load schedule.

There is no restriction on the file types that you can attach as documentation.

You can only attach a single physical file from this field.

Tip:

If you want to include multiple files as documentation, you can compress them into a single file and attach the compressed file. Alternately, you can include the documentation (or any other files) that you want to include in an extracted configuration by placing them in this directory:

```
<Solution Directory>/<solution name>/
```

All contents of the <solution name> directory are automatically included in the .par file created by Configuration Assistant when it performs an Extract. However, even though the files are delivered to a source location using this method, they are not associated with a task as they would be if you used the Documentation field.

This directory is defined in *Using Preferences*.

- **Deploy To:**

Note: Use this option to limit the configuration consumer's deployment options when the extracted configuration is deploying using Change Assistant. Use of this option does not limit the users of Configuration Assistant.

Use the drop-down list to select the environments to which to deploy:

- Selected Environment(s)

Using this selection you can deploy to any selected environment, which can include local environments as well.

- Local Environment Only

Using this section you can only deploy to local environment, regardless of whether the environment is explicitly selected or not. When you select this option, all other selected environments are ignored.

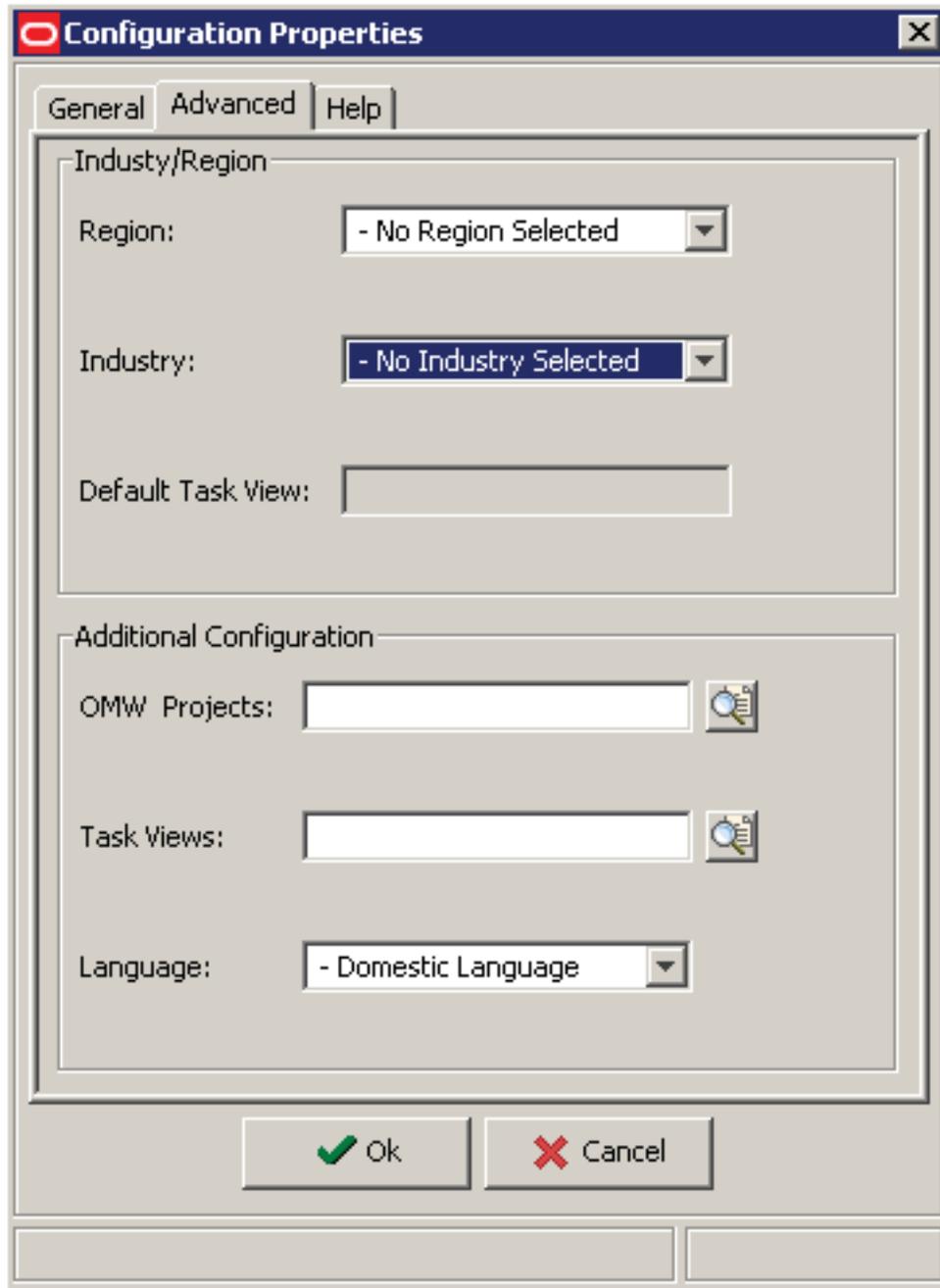
- Local and Selected Environment

Using this selection you can deploy to all selected environments, including any local environment regardless of whether local environment is explicitly selected or not.

Configuration Properties - Advanced Tab

You should use the Advanced tab to make selections from preconfigured solutions, if you already have predefined OMW Projects or Tasks Views, or if you are using languages.

JD Edwards Tools Release 8.97



JD Edwards Tools Release 8.98 or greater

The screenshot shows a dialog box titled "Add Configuration" with a blue header bar containing a red close button (X) on the right. Below the header are three tabs: "General", "Advanced" (which is selected and highlighted in yellow), and "Help". The dialog is divided into two main sections. The first section, titled "Industry/Region", contains three fields: "Region:" with a dropdown menu showing "- No Region Selected", "Industry:" with a dropdown menu showing "- No Industry Selected", and "Default Task View:" with an empty text box. The second section, titled "Additional Configuration", contains two fields: "Task Views:" with an empty text box and a magnifying glass icon to its right, and "Language:" with a dropdown menu showing "- Domestic Language". At the bottom of the dialog are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon. A small empty text box is located at the bottom right of the dialog.

On Configuration Properties, with the Advanced tab selected, complete the fields in these two sections:

- *Industry/Region*
- *Additional Configuration*

Industry/Region

In the Industry/Region section of the Advanced tab, complete these fields:

- **Region**

The drop-down list is populated based on the UDC Description01 field for the region (01RS/RC).

For example:

ANZ - Australia/New Zealand

- **Industry**

The drop-down list is populated based on the UDC Description01 field for the industry (01RS/RI).

For example:

MD - Manufacturing and Distributing

CAUTION:

The first time you define an industry or region in a configuration, the data is retrieved based on the combination of the region and industry UDC values specified. If you subsequently change the industry or region UDC, your changed configuration will still contain the original data because Configuration Assistant only changes the definition of the data within the configuration, and not the data itself. When you extract the configuration, Configuration Assistant assigns any Versions with the changed value.

For example, if you first design a configuration based on the ANZ region, Configuration Assistant pulls in all record types associated with that UDC. If you subsequently change the region to Singapore, then the previously retrieved data remains the same, while in the configuration the identifier for the records is changed from ANZ to SIN. When you extract the configuration, Configuration Assistant changes the identifier for Versions from ANZ to SIN. As a result, when the configuration is loaded into a target environment, there are no artifacts from the ANZ region.

CAUTION: For UDC values of the 01RS/RC and 01RS/RI tables other than the defaults provided by JD Edwards EnterpriseOne:

- Customers should use values in the range of 900 to 999 for their configuration.
- Business partners should contact Oracle to obtain a unique code.

- **Default Task View**

The Default Task View is based on the values you select for region and industry. The field is populated automatically after an industry and region are selected.

Additional Configuration

In the Additional Configuration region of the Advanced tab, complete these fields:

- **OMW Projects** (not displayed with JD Edwards Tools Release 8.98 or greater)

Click the browse button to select from existing OMW Project Names. This enables you to bring all configuration information such as UDCs and Versions into your definition.

Note: Configuration information does not include code or objects. For more information about product packaging, see [JD Edwards EnterpriseOne Tools Package Management Guide](#) .

- **Task Views**

Click the browse button to select from an existing Task Master for tasks of type 00 (Task Views).

- **Language**

Configuration Assistant populates a drop-down list of languages based on the values of UDC 01/LP. When you select a language from this drop-down list, the translation table (that is, "D" table) records for UDCs and Task Views are included in your configuration.

For example, a language selection on the drop-down list might be:

P - Portuguese

Note: Specifying a language pulls language records into your configuration for UDCs and Task Views only. If you want to include the entire translation table for these, or any other data, you must specifically include translation tables in the *Tables* section of your configuration definition.

Note:

- [Configuration Properties - General Tab](#)

Extracting a Configuration

After you create a configuration, you can extract it to a portable database. The output of the extraction depends on the JD Edwards EnterpriseOne Tools release, JD Edwards EnterpriseOne Applications Release, and the machine on which the extraction is performed. This topic describes how to extract a configuration.

Tip:

On Web Development Clients (Fat Clients), the Extract function allows you to extract local specifications and Central Objects.

On Standalone Clients and the Deployment Server, the Extract function only allows you to extract local specifications.

Extraction Output Matrix

Tools Release	Output
---------------	--------

Extraction Output Matrix			
	Applications Release 8.12 or prior	Application Release 9.00	
8.98	XML	XML -- with these extraction machine variables:	
	MSDE	Standalone:	Extract Local > XML
	SSE	Deployment Server:	Extract Local > XML
		Web Development Client:	Extract Central > XML Extract Local > XML
8.97 8.96	Depends on installed database on extraction machine which can be either of the following: <ul style="list-style-type: none"> • MSDE • SSE 	MSDE	

Note:

- *Troubleshooting Extract*
- *Packaging and Loading an Extracted File onto a Target Machine*
- *Tables Involved when Extracting a Configuration Definition with Configuration Assistant*

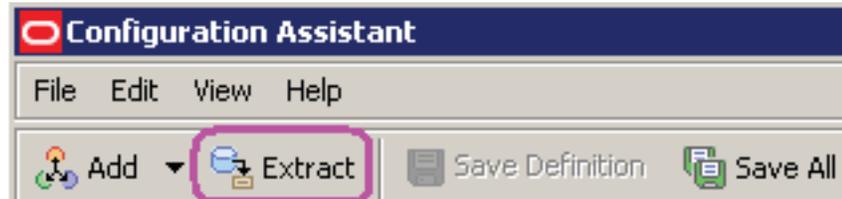
To extract a configuration, highlight the configuration to be extracted in the tree node display in the left pane:

1. From the Configuration Assistant toolbar, select File > Extract.

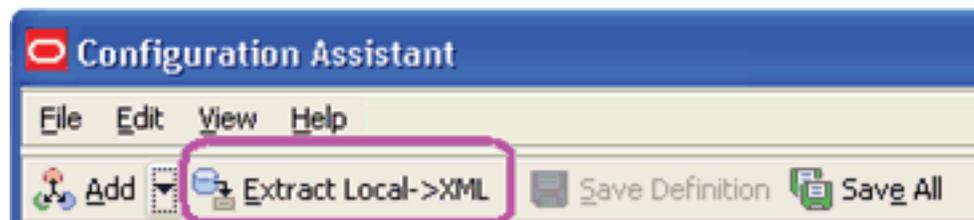
Note: As an alternate method, you can either:

- Click the Extract button.

Extract button (Tools Release 8.97)

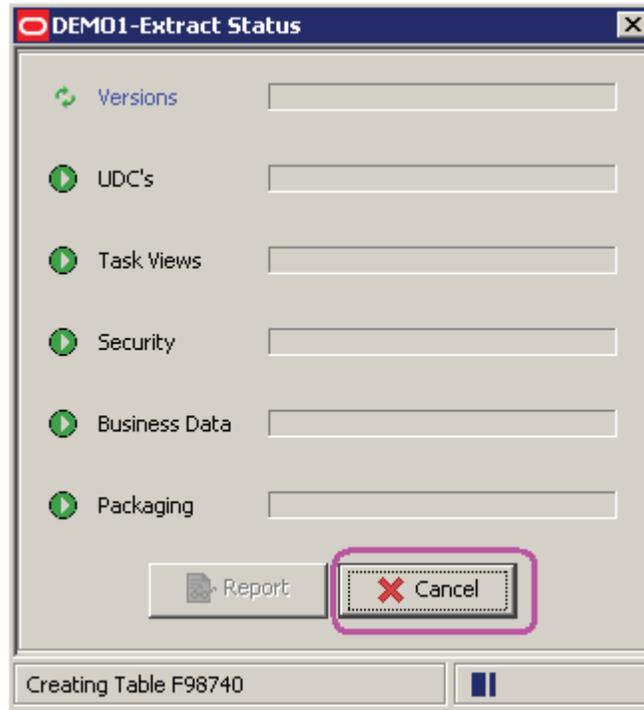


Extract button (Tools Release 8.98)



- Use the keyboard shortcut: Ctrl+T

CAUTION: If you accidentally click Extract, or if you want to stop the Extract process after it has begun, click the Cancel button in the Extract Status dialog box.



The status of the extraction process is displayed in the `node_name-Extract Status` panel.

If the Extract completes successfully, each extracted category will be flagged with a green check mark and the bottom of the Extract Status panel will indicate **Completed Successfully** in the bottom left of the dialog box.

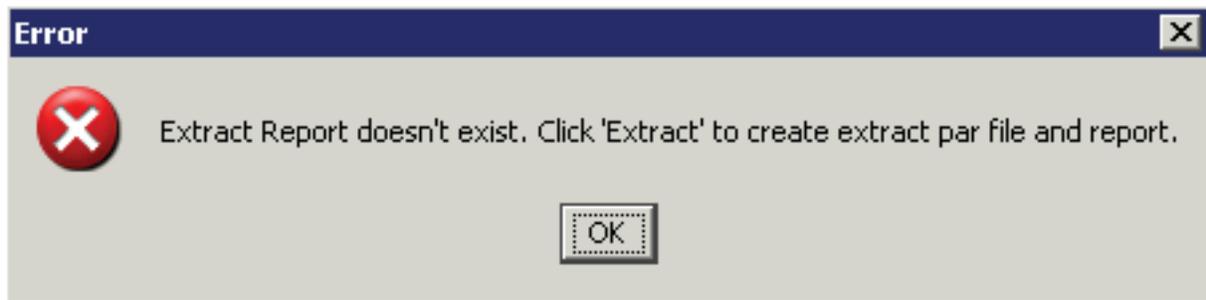
2. When the extraction is complete, select either Report to view the Extract Report or Close to close the Extract Status window.

For details about the Extract Report, refer to [Extract Report](#).

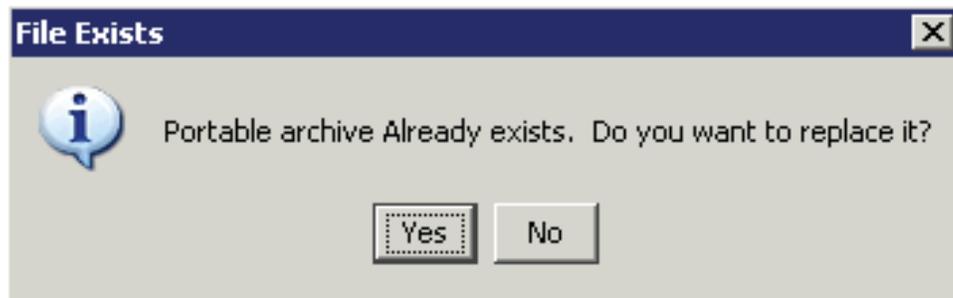
Tip: The portable archive (.par file) of the configuration that you extract is placed into the directory you have specified in [Using Preferences](#). The prefix of the .par file (that you specified in Name field during the task [Adding a New Configuration](#)) identifies each custom configuration you create in My Configurations.

Troubleshooting Extract

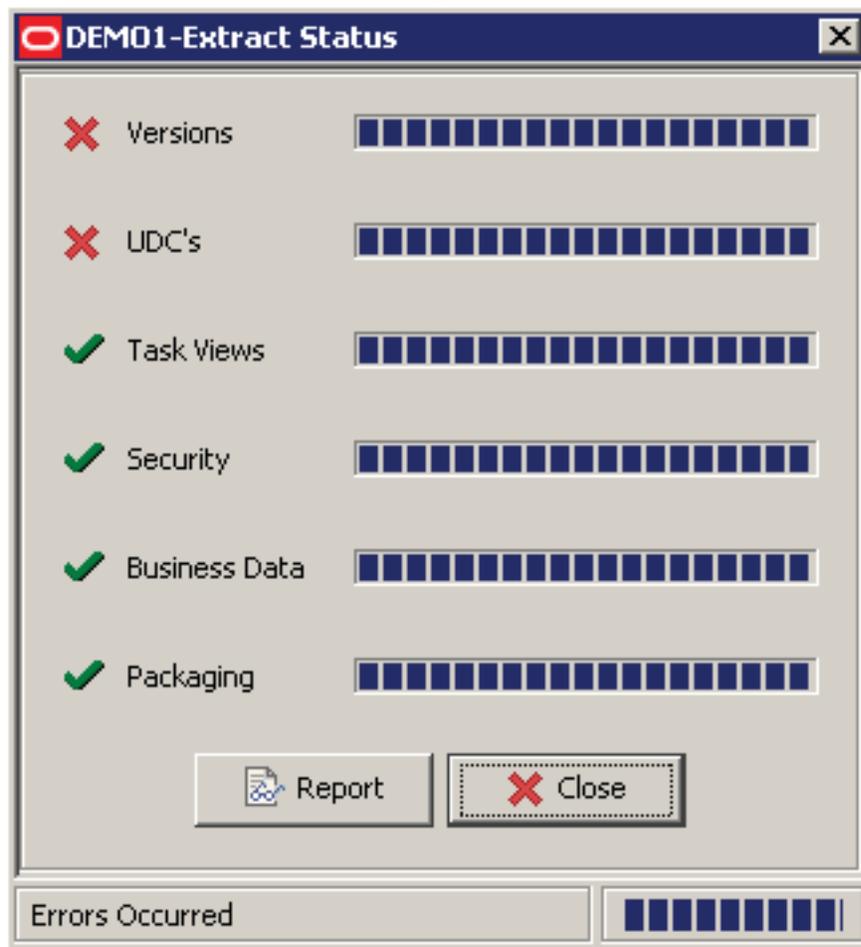
If you have not previously extracted a report for the selected configuration, and you attempt to view the Extract Report, this error message is displayed:



If you have previous extracted a configuration, this error message is displayed:



CAUTION: If the Extract does not complete normally, each unsuccessful category will be flagged with a red X and the bottom of the of the Extract Status panel will indicate Errors Occurred. Click the Report button to view the exception report, which contains information useful in troubleshooting the error conditions.



Click Yes to view the Exception Report. For details about the Extract Report, see *Extract Report*.

Tip: You can also use OMW logs to help in troubleshooting. In OMW, find the project named **CFG** *_your_configuration_name* , click the project, and use the form exit to view the logs.

Packaging and Loading an Extracted File onto a Target Machine

Configuration Assistant. This tool is used to create configurations and to extract them into a portable archive. Typically the machine on which the tool is running must use a Microsoft Windows operating system. Also typically, such a machine would be either a JD Edwards EnterpriseOne Standalone Client or a JD Edwards EnterpriseOne Web Development Client (also known as a Fat Client).

The output of the extraction depends on the JD Edwards EnterpriseOne Tools release, JD Edwards EnterpriseOne Applications release, and the machine on which the extraction is performed. For details, see the Extraction Output table in the section entitled: *Extracting a Configuration*.

Change Assistant. This tool is used to load an extraction onto a target machine, which must be a JD Edwards EnterpriseOne Deployment Server or Standalone Client. By definition, the Deployment Server must also be running

a Microsoft Windows operating system. By default, Configuration Assistant creates the .par file in the directory you specified in *Using Preferences*.

To summarize the Change Assistant steps:

1. To avoid having Change Assistant inadvertently locate test extractions or perhaps other extractions that you might not be ready to share, copy the .par file to an appropriate folder under the Change Assistant downloads directory on the Deployment Server or Standalone Client.
2. Navigate to the specified source directory containing the .par file and select the .par file from the Change Assistant display.
3. Click the Deploy button.

Change Assistant displays a list of available JD Edwards EnterpriseOne installed environments on this machine (which is either a Deployment Server or Standalone Client).

4. Select the target JD Edwards EnterpriseOne environment into which you want to load the contents of the configuration.

CAUTION: Always beware of data integrity concerns, especially in production data environments. See *Backing Up Your Target Database Environment*.

Tables Involved when Extracting a Configuration Definition with Configuration Assistant

This section lists the tables involved when extracting a configuration definition with Configuration Assistant.

1. OMW Projects and OMW Objects

These tables and objects will have records extracted corresponding to the OMW projects and OMW Objects specified in the advanced options:

Table	Description or Object Type
F98220	OMW Project Header
F98222	OMW Project Objects
F9860	TBLE -- Object Librarian Master Table
F9861	TBLE -- Object Librarian Status Detail
F98710, F98711, F98712, F98713	TBLE
F98720	BSFN
F98740, F98741	ER
F98743	DSTR

Table	Description or Object Type
F98750, F98751	APPL
F98760, F98761	UBE

2. Versions

These tables will have records extracted corresponding to the Versions specified in the configuration definition:

- F983051 - Versions List
- F983052 - Versions List Tag Table
- F98740 - Event Rules - Link Table
- F98741 - Event Rules - Spec Table
- F98760 - Report Design Aid Text Information
- F98761 - Report Design Aid Specification Information

3. User Defined Codes

These tables will have records extracted corresponding to the UDC codes and values specified in the configuration definition:

- F0004 - User Defined Code Types
- F0005 - User Defined Code Values

Note: If language is specified, these tables will also be extracted.

- F0004D - User Defined Code - Alternate Language
- F0005D - User Defined Code - Alternate Language Description

4. Task Views

These tables will have records extracted corresponding to the Task Views specified in the configuration definition:

- F9000 - Task Master
- F9001 - Task Relationships
- F9005 - Variant Description
- F9006 - Variant Detail

Note: If language is specified, these tables will also be extracted.

- F9002 - Task Alternate Description
- F9005D - Variant Description Alternate Description
- F9006D - Variant Detail Alternate Description

5. Security

These tables will have records extracted corresponding to the users and roles specified in the configuration definition, and the address book information associated with these users will also be extracted:

- F0092 - Library List - Users
- F00921 - User Display Preferences
- F00922 - User Display Preferences Tag File
- F00924 - User Install Packages
- F00925 - User Access Definition
- F00926 - Anonymous User Access Table
- F00927 - E1 Users PIM Information
- F0093 - Library List Control
- F00950 - Security Workbench Table
- F95921 - Role Relationships Table
- F95922 - Permissions List Relationship Table
- F98OWSEC - One World Security
- F0101 - Address Book Master
- F0111 - Address Book - Who's Who

Saving a Configuration

CAUTION: You must be within the My Configurations folder in order to save a configuration.

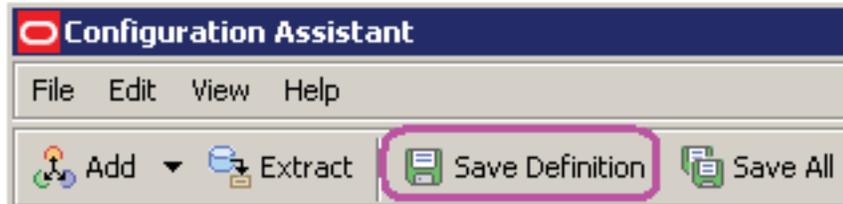
To save a configuration that you have created (or modified), select Save Definition:

1. Highlight the node for the definition you want to save.

2. From the Configuration Assistant toolbar, select File > Save Definition.

Note: As an alternate method, perform either of the following actions:

- Click the Save Definition button.



- Use the keyboard shortcut: Ctrl+S

Saving All Configurations

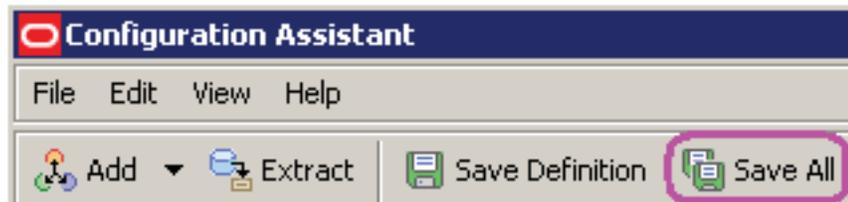
CAUTION: You must be within the My Configurations folder in order to save all configurations.

To save all configurations that you have created (or modified), select Save All:

1. Highlight the node for the definition you want to save.
2. From the Configuration Assistant toolbar, select File > Save All.

Note: As an alternate method, you can perform either of the following actions:

- Click the Save All button.



- Use the keyboard shortcut: Ctrl+Shift+S

Edit

From the Edit menu, you can perform functions as described in these sections:

- *Using Standard Editing Functions (Cut, Copy, Paste, Delete, Rename)*
- *Using Preferences*

Using Standard Editing Functions (Cut, Copy, Paste, Delete, Rename)

CAUTION:

All configurations within the JD Edwards Configurations node are read-only. Configuration Assistant logically enables and disables certain standard editing functions as applicable, depending on which tree node you select and the context of the configuration.

If you select Delete, there is no direct recovery (or "undo") from within the Configuration Assistant program. However, if you do not perform Save or Save All subsequent to an inadvertent Delete action, you can effectively recover by not saving, then exiting from Configuration Assistant, and then re-entering with the previously saved state.

This section describes these standard editing functions:

- *Cut*
- *Copy*
- *Paste*
- *Delete*
- *Rename*

Tip:

The functionality of the standard editing functions is also duplicated with Drag and Drop.

For example, if you want to copy the security roles from JD Edwards Configuration to My Configurations, you can either:

- In the source JD Edwards Configuration, highlight the Roles node and choose the standard editing function Copy (either from the Edit menu or with a right-click).

In the target My Configuration, highlight either the Roles node (if it exists), or the Security node (if the Roles node does not exist) and choose the standard editing function Paste.

- In the source JD Edwards Configuration, highlight the Roles node and drag it.

In the target My Configuration, drop the Roles node that you are dragging either to the Roles node (if it exists) or the Security node (if the Roles node does not exist).

Note:

- The topic *Edit Functions in Specific Nodes* in the section *Productivity Hints*.

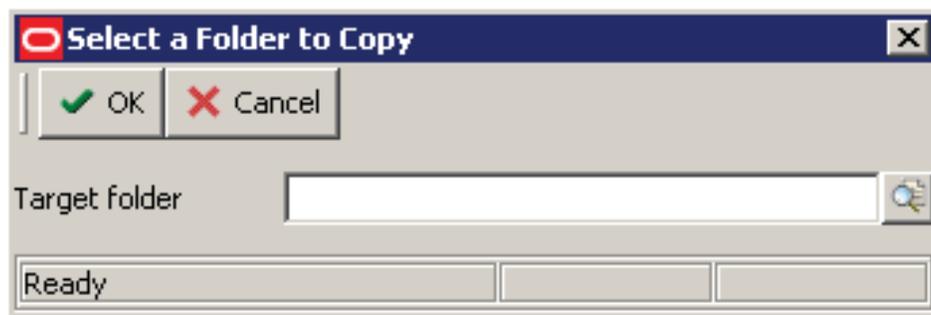
Cut

If you use the standard editing function Cut from either the Edit menu or with the keyboard shortcut Ctrl+C key, the currently selected node is deleted and its contents are copied to the clipboard.

Copy

If you use the standard editing function Copy from either the Edit menu or with the keyboard shortcut Ctrl+C, the contents of the selected node are copied to the clipboard and can be pasted into a new location by using the Paste command.

If you right-click and select Copy, this dialog box prompts you to enter the new name of the selected node:



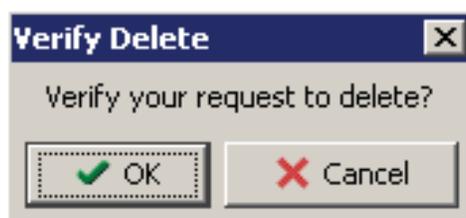
Tip: Use the browse button or enter a fully qualified path to the target directory to which you want to copy the selected node. For example: `c:\Change Assistant\Packages\Configurator\My Configurations\copied_configuration_name`

Paste

If you use the standard editing function Paste from either the Edit menu or with the keyboard shortcut Ctrl+V key, the current contents of the clipboard are pasted into the currently selected node.

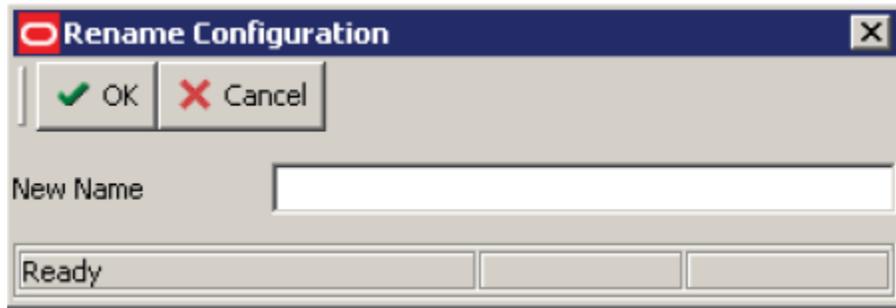
Delete

If you use the standard editing function Delete from either the Edit menu or with the keyboard shortcut Delete key, you are prompted to confirm the deletion:



Rename

If you use the standard editing function Rename from either the Edit menu or with the keyboard shortcut F2, you are prompted to enter the new name for the selected node:

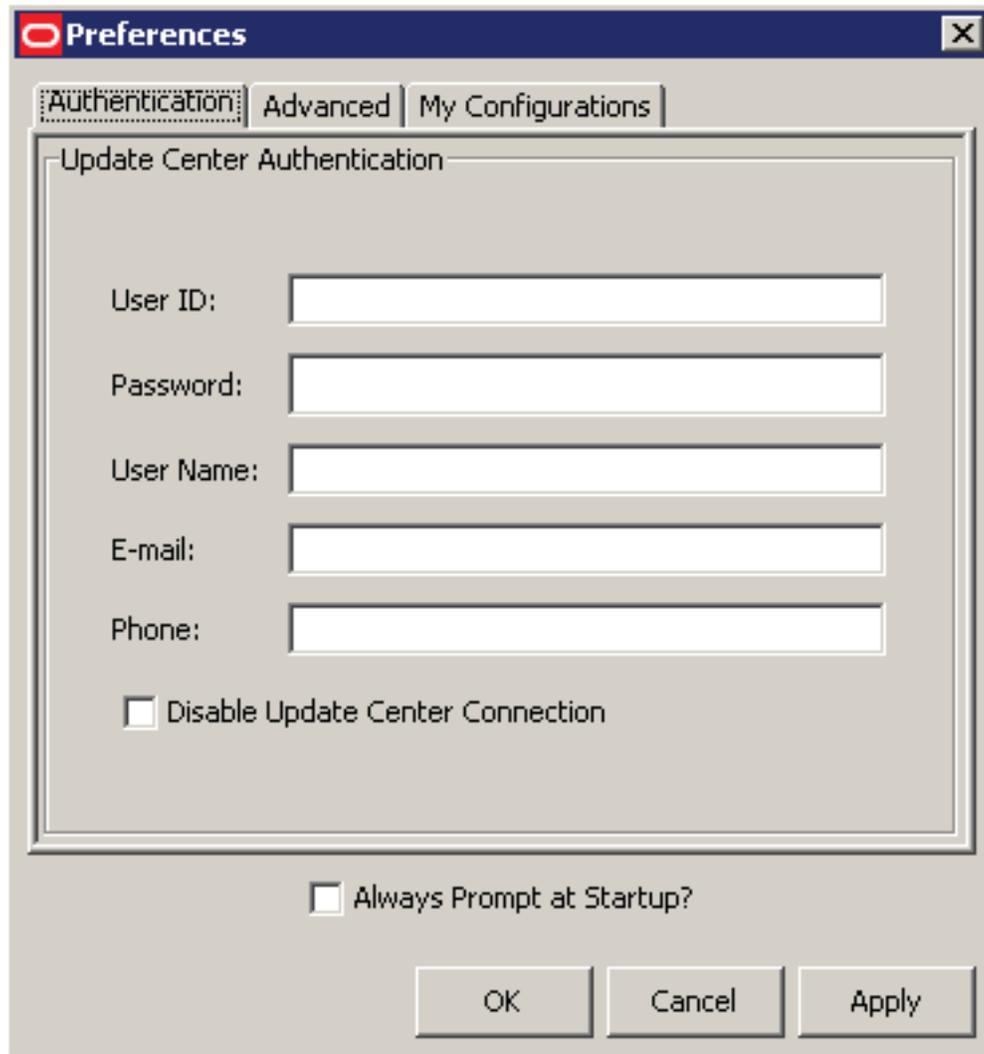


Using Preferences

From Edit > Preferences you can select preferences from the tabs described in these sections:

- *Using the Authentication Tab*
- *Using the Advanced Tab*
- *Using the My Configurations Tab*

Using the Authentication Tab



The screenshot shows a 'Preferences' dialog box with three tabs: 'Authentication', 'Advanced', and 'My Configurations'. The 'Authentication' tab is selected. Inside the dialog, there is a section titled 'Update Center Authentication' which contains five text input fields: 'User ID:', 'Password:', 'User Name:', 'E-mail:', and 'Phone:'. Below these fields is a checkbox labeled 'Disable Update Center Connection'. At the bottom of the dialog, there is another checkbox labeled 'Always Prompt at Startup?' and three buttons: 'OK', 'Cancel', and 'Apply'.

If you want to use the optional Configuration Assistant Update Center Authentication functionality, complete these fields:

- User ID
- Password
- User Name
- E-mail
- Phone

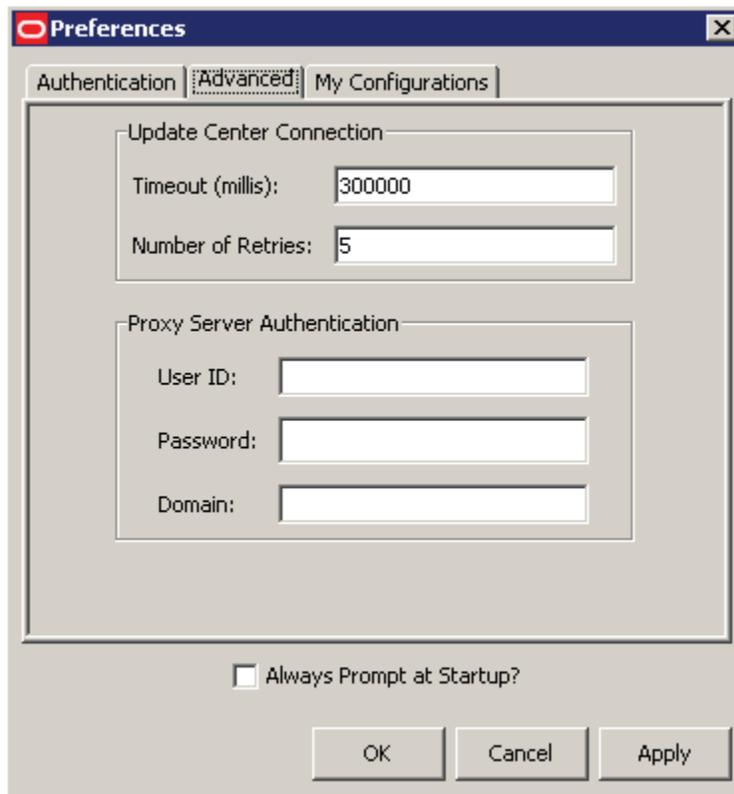
If you want to disable the automatic connection to the Update Center, select this check box:

Disable Update Center Connection

If you want Configuration Assistant to always prompt for authentication credentials during startup, you can select this check box:

Always Prompt at Startup?

Using the Advanced Tab



If you want to use the optional Configuration Assistant advanced functionality for connections to the Update Center and for proxy server authentication, complete these fields:

Update Center Connection

- Timeout (milliseconds)
The default value is 300,000 milliseconds.
- Number of Retries
The default value is 5 retries.

Proxy Server Authentication

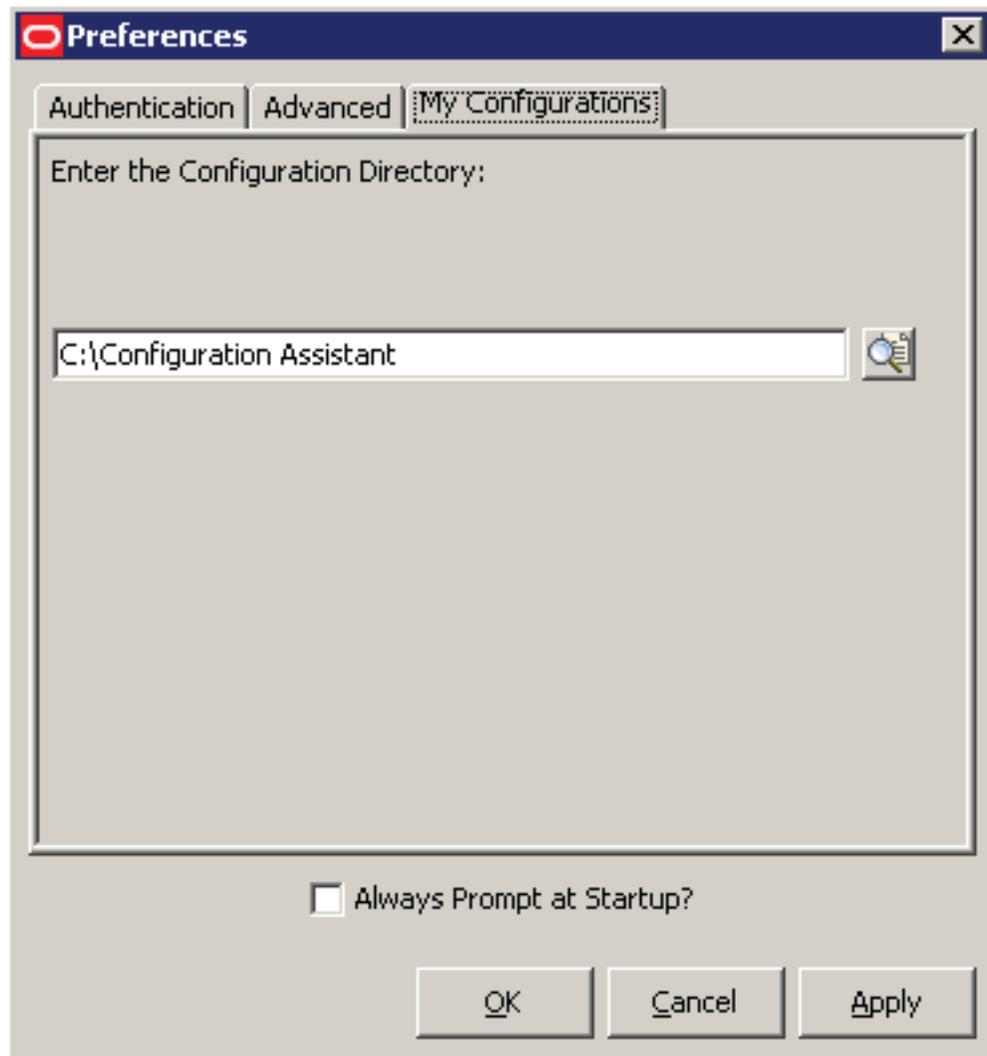
- User ID
- Password
- Domain

If you want to be prompted for any advanced functionality on this tab during the startup of Configuration Assistant, you can select this check box:

Always Prompt at Startup?

Using the My Configurations Tab

Use the My Configurations tab to define the default working directory for your Configuration Assistant. This is the working folder for all configurations that you create.



On Preferences, with the My Configurations tab selected, complete this field:

Enter the Configuration Directory

Enter the directory path or use the browse button to enter the directory for your configurations, which the Configuration Assistant displays under the My Configurations node.

CAUTION: If you plan to extract RDB configurations this path cannot lead to a mapped drive.

View

The View menu enables you to generate HTML versions of these reports:

- *Summary Report*
- *Extract Report*

- [Compare Report](#)
- [Refresh](#)

Summary Report

Note: As a design aid, you can view a Summary Report for any new or existing configuration regardless of whether it has been extracted using the Extract function of Configuration Assistant.

The Summary Report provides a listing of all the information contained in the configuration. The report provides links so that you can easily navigate to each section, including:

- Definition
- OMW Projects and OMW Objects
- Tables
- UDCs

Note: The system generates UDCs in this report if you specify one UDC value at a time. If you specify an entire table, the system generates UDCs in the Tables section of this report.

- Versions
- Security
- Task View

The report only displays a link if information exists for the section. That is, if you do not include a Task View in the configuration, the Summary Report does not create a link to Task View.

In addition, if any documentation is attached to the report, the system provide an active link to it. The generated source HTML file for the Summary Report is located in the directory of the node name. For example, if you generate a Summary Report for RSMDGR, then the file is located here:

```
x: \Change Assistant\Packages\ your_configuration_name
```

In this location, *x:* is the drive on which your configurations reside, and

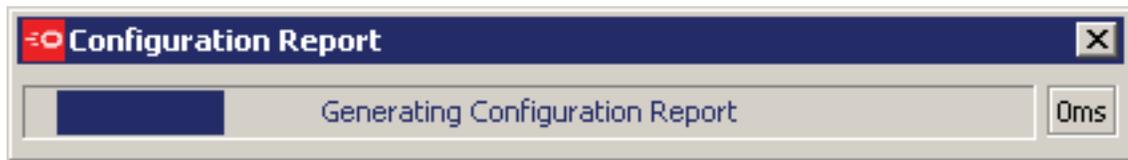
Also, *your_configuration_name* is the name of the node that defines your configuration.

To generate a Summary Report:

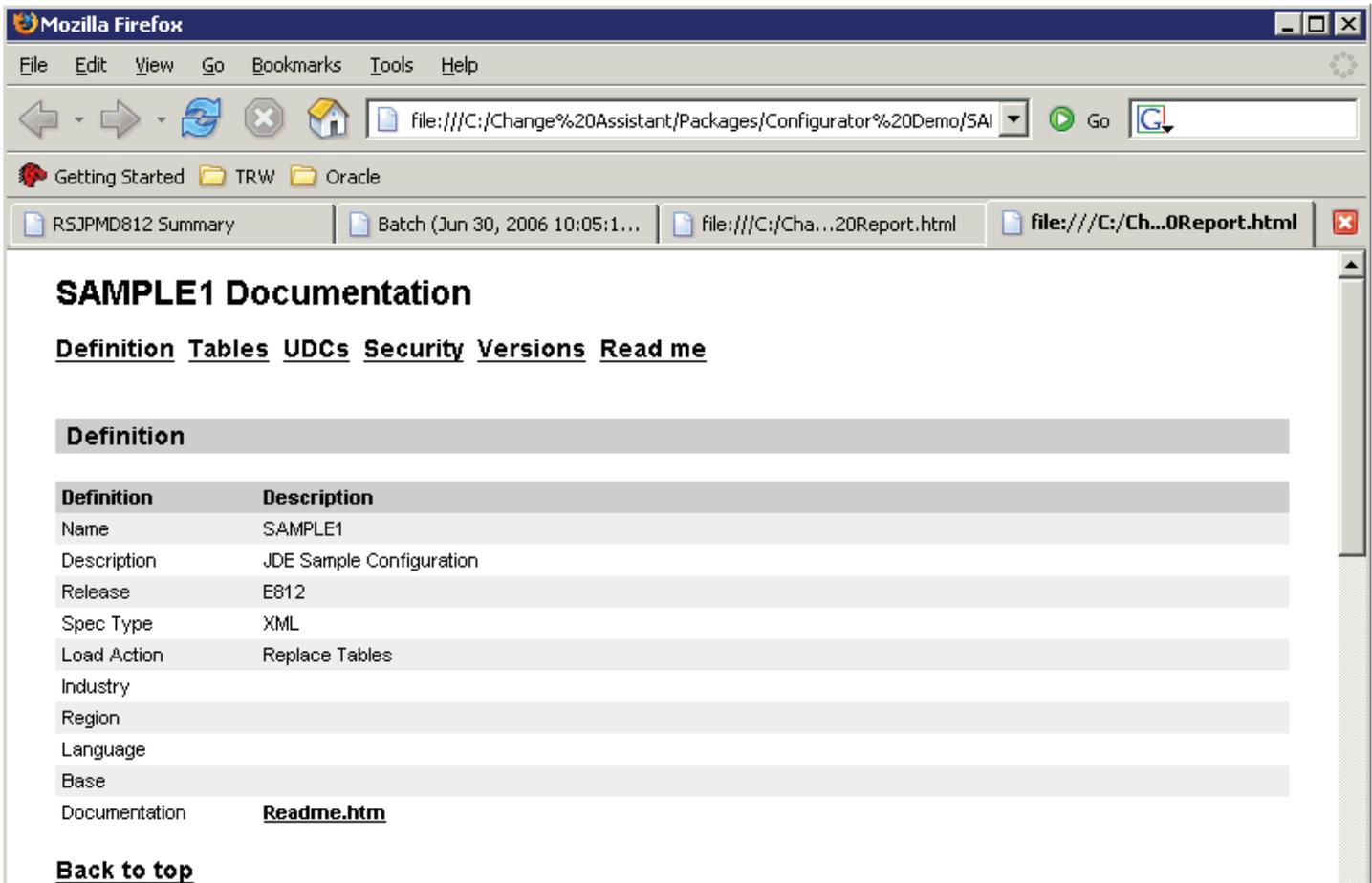
1. Highlight any node in an existing configuration.

- From the View menu, select Summary Report.

The following status panel is displayed to indicate the report is generating as requested:



After the report is generated, the HTML output is displayed by your default browser as shown in this example:



Extract Report

The Extract Report provides a listing of all the information about the extraction process and the resulting .par file. The report provides links so that you can easily navigate to each section, including:

- Definition

- Action
- Activity

You can only view an Extract Report for configurations that you have previously extracted. To verify if a configuration has already been extracted, check the directory of the node to verify if a <node_name>_EXTRACT.html file exists. If this file exists, an Extraction has previously been attempted for the selected configuration. To verify that the Extract process is valid, open the Extract Report file and verify that the extraction completed with no errors.

To view an Extract Report:

1. Highlight a configuration for which you have previously performed an Extract.
2. From View, select Extract Report.

The screenshot shows a Mozilla Firefox browser window titled 'SAMPLE1 Summary - Mozilla Firefox'. The address bar shows a file path: 'file:///C:/Change%20Assistant/Packages/Configurator%20Demo/SAI'. The browser content area displays the 'SAMPLE1 Extract Status' page. The page has three tabs: 'Definition', 'Action', and 'Activity', with 'Definition' selected. Below the tabs is a table with two columns: 'Definition' and 'Description'. The table contains the following data:

Definition	Description
Name	SAMPLE1
Description	JDE Sample Configuration
Type	60 , Configuration Data
Platform	99 , CLIENT
Release	E812 , E812
Date	Jun 26, 2006 5:50:45 PM

Below the table is a 'Back to top' link. Further down, there is a section titled 'Action - Action1151365846807' which contains another table with five columns: 'Action', 'Type', 'Status', 'Action ID', and 'Date/Time'. The table contains one row of data:

Action	Type	Status	Action ID	Date/Time
Create Package - Extract to portable form	CREATE_PAR	Success	Action1151365846807	Jun 26, 2006 5:50:46 PM

Compare Report

If you want to compare the contents of one configuration against another, you can view the Compare Report, which presents a side-by-side comparison of the components for the two configurations that you choose. The Compare Report provides two groups of links, which you can use to review the configurations differently:

- **All**

The links in this grouping provide a listing of the components for the first configuration and a second column that describes whether the component exists in the second configuration. For example, All Tables provides a listing of all the tables in the first configuration and a Yes/No value in the column for the second configuration to indicate whether the second configuration table is included there.

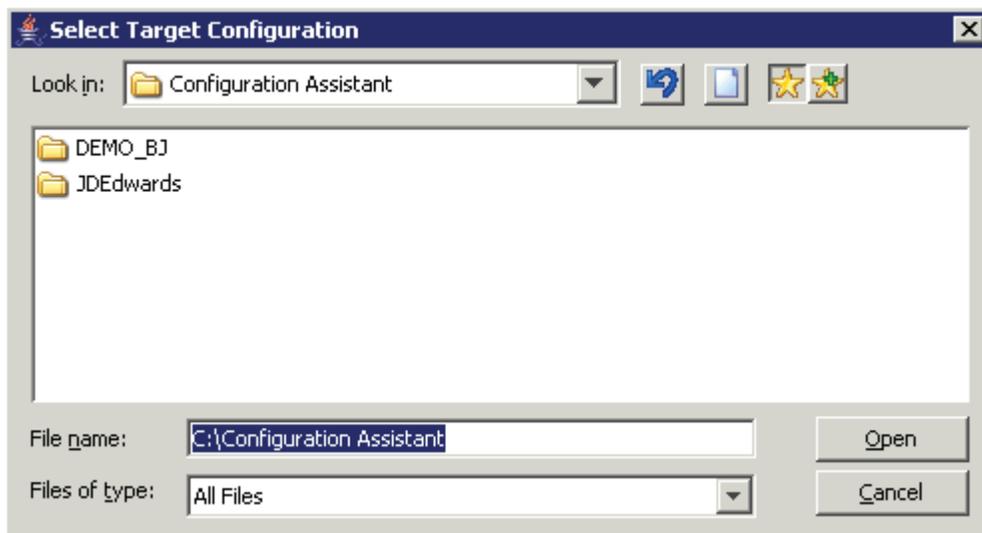
- **Added and Removed**

The links in this grouping provide the differences noted in the All comparisons categories. For example, if you clicked the Added Tables link, the system displays the additional business units in the first configuration that are not in the second. If there are more tables in the second configuration than the first, a link for Removed Tables lists the tables in the second configuration.

To compare configurations:

1. Highlight an existing configuration and from the View menu select Compare Report.

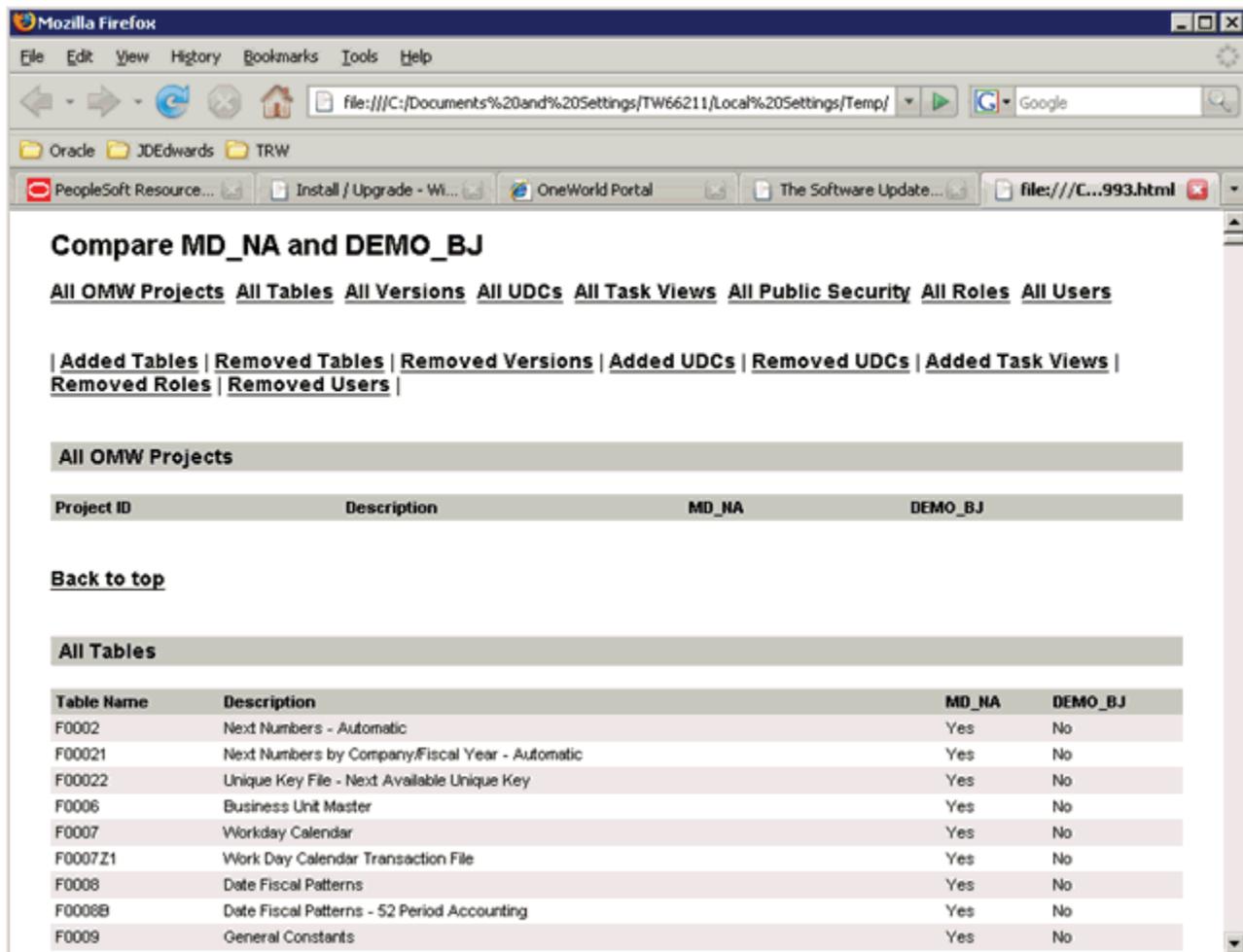
The system displays this window:



2. Use the browse button or enter the path to locate the configuration that you want to use for the comparison.

3. Click Open.

Configuration Assistant generates the Compare report and opens it in your default browser. For example:

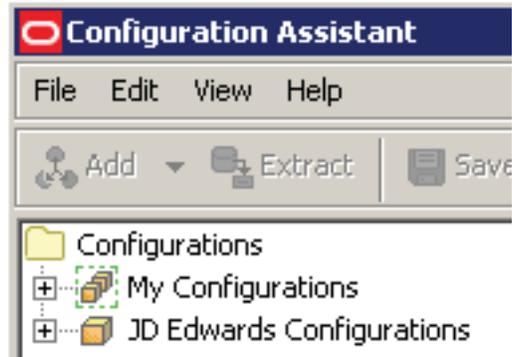


4. Use the links at the top of the report to navigate through the different sections of the report. Each topic contains a comparison of items (by names, numbers, and descriptions) that exist in one configuration, but not the other.

Note: In this context, the term “removed” indicates that no add or append action occurred resulting in a difference between the compared configuration, where the source configuration contains an item while the target configuration does not.

Refresh

From the View menu, if you select Refresh (or use the keyboard shortcut F5), the Configuration Assistant refreshes the screen and returns the tree node display in the left-hand pane to a fully collapsed state. The contents display in the right pane is not affected.



CAUTION: When you make changes (which the system indicates by bold portions of a configuration and affected nodes), clicking Refresh will cause the system to disregard any changes that you made but did not save.

Help

When you select Help from the menu selections, you can choose from:

- [Show Log](#)
- [About Configuration Assistant](#)

Note:

- The topic [Help Tab](#) in the section: [Welcome to JD Edwards EnterpriseOne Configuration](#).

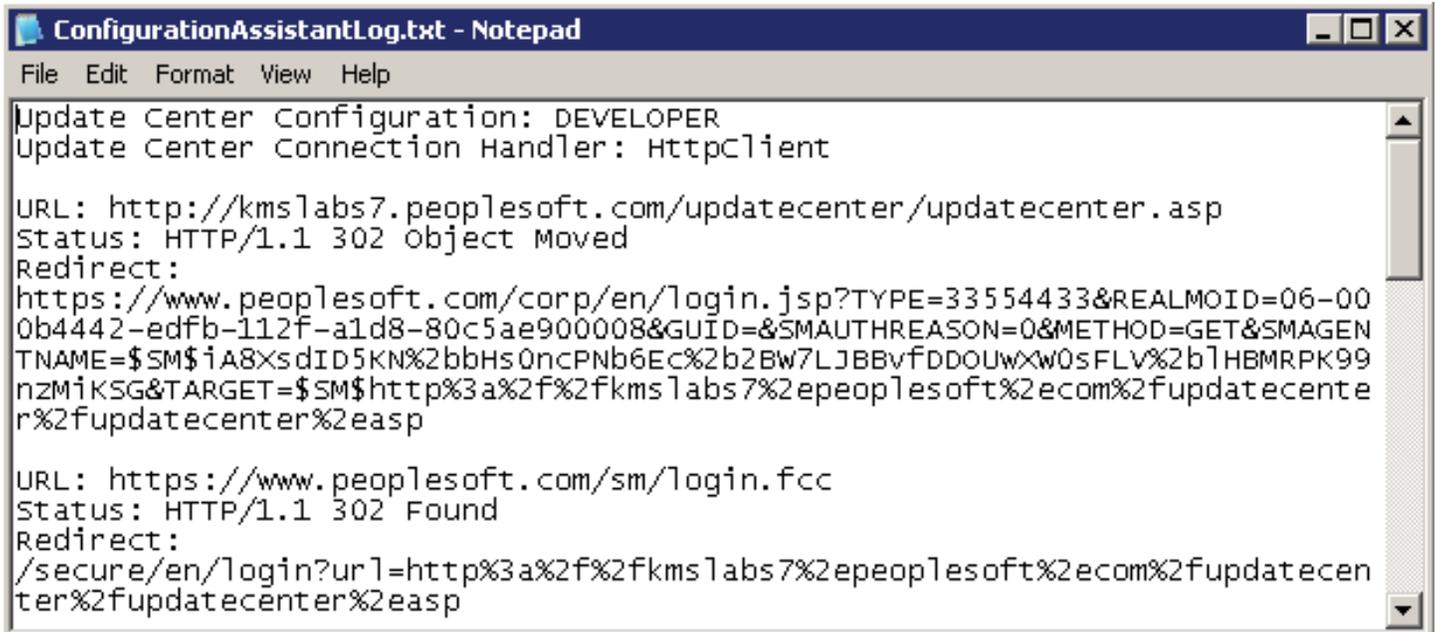
Show Log

The Configuration Assistant creates a new log file every time you start Configuration Assistant. If a log file exists from a prior startup, it is overwritten.

The type of errors written to this log are typically those for which Configuration Assistant has specific knowledge, such as Java exceptions, or if Configuration Assistant detects that Update Center is down.

The log file is written to the Configuration Directory specified on the My Configurations tab of Preferences, as described in [Using Preferences](#) of this guide. The name of the log file is ConfigurationAssistantLog.txt

This an example of the contents of a Configuration Assistant log file:



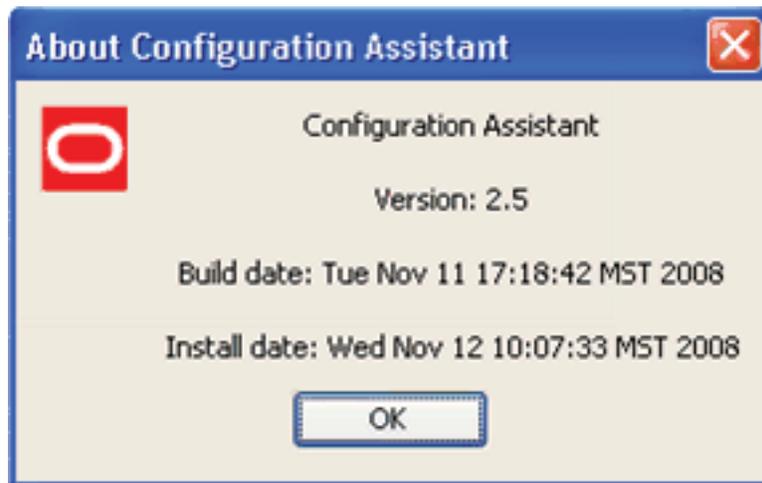
```
ConfigurationAssistantLog.txt - Notepad
File Edit Format View Help
Update Center Configuration: DEVELOPER
Update Center Connection Handler: HttpClient

URL: http://kmslabs7.peoplesoft.com/updatecenter/updatecenter.asp
Status: HTTP/1.1 302 Object Moved
Redirect:
https://www.peoplesoft.com/corp/en/login.jsp?TYPE=33554433&REALMOID=06-00
0b4442-edfb-112f-a1d8-80c5ae900008&GUID=&SMAUTHREASON=0&METHOD=GET&SMAGEN
TNAME=$SM$iA8xsdID5KN%2bbHs0ncPNb6Ec%2b2BW7LJBBvfDDOUwXW0sFLV%2b1HBMRPK99
nzMikSG&TARGET=$SM$http%3a%2f%2fkmslabs7%2epeoplesoft%2ecom%2fupdatECE
r%2fupdatecenter%2easp

URL: https://www.peoplesoft.com/sm/login.fcc
Status: HTTP/1.1 302 Found
Redirect:
/secure/en/login?url=http%3a%2f%2fkmslabs7%2epeoplesoft%2ecom%2fupdatECE
r%2fupdatecenter%2easp
```

Tip: The logging levels cannot be selectable by the end user.

About Configuration Assistant



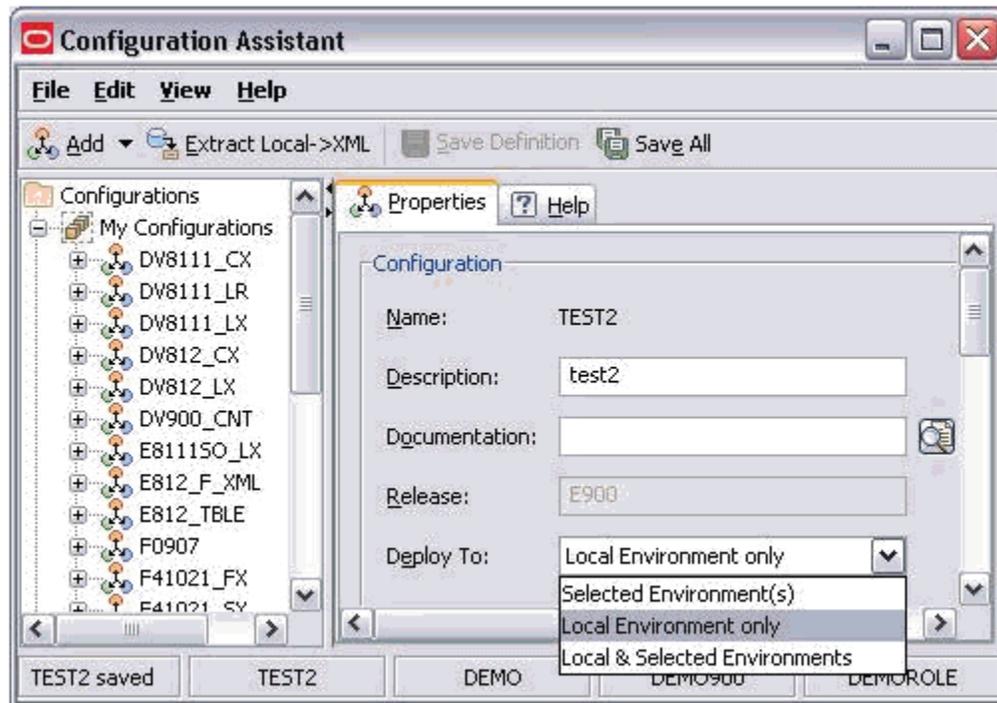
If you choose About Configuration Assistant from the Help menu, a dialog box is displayed that contains this information about Configuration Assistant:

- Version
- Build date
- Install date

Click OK to close the dialog box and return to Configuration Assistant.

3 My Configurations

My Configurations



The My Configurations folder stores the definitions that the Configuration Assistant tool uses to create the portable archive of a configuration. Your customized My Configurations contain the framework for specific solutions packaged by the Extract function of the Configuration Assistant tool into the portable archive.

You can use any portion of the JD Edwards read-only configurations as a basis for your custom configuration. For a description of the Configuration Assistant tools you can use to duplicate any functionality, see [Using Standard Editing Functions \(Cut, Copy, Paste, Delete, Rename\)](#).

These subnodes of My Configurations are described separately:

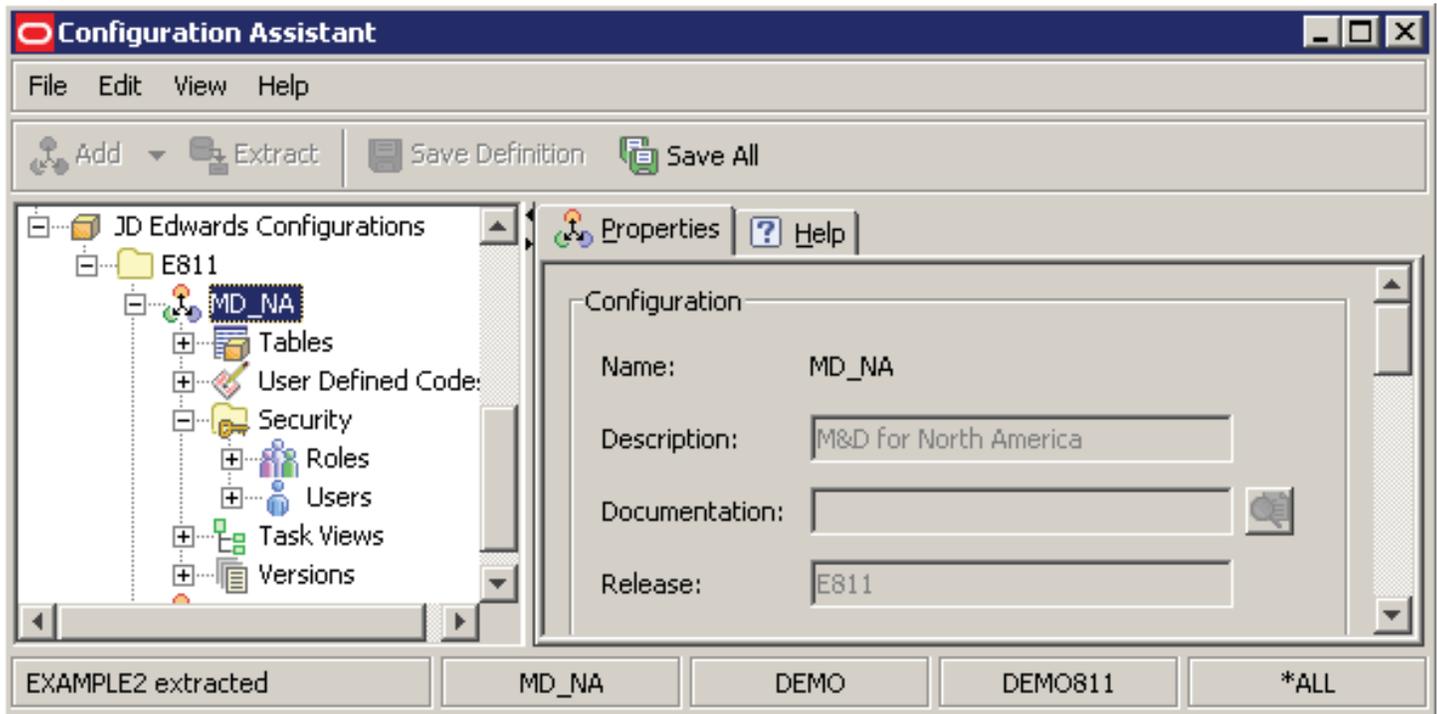
- [Tables](#)
- [Tables](#)
- [OMW Projects and OMW Objects](#)
- [User Defined Codes](#)
- [Security](#)
- [Task Views](#)
- [Versions](#)

Note:

- *Adding a New Configuration*
- *Extracting a Configuration*
 - *Troubleshooting Extract*
 - *Packaging and Loading an Extracted File onto a Target Machine*
- *Saving a Configuration*
- *Saving All Configurations*
- The topic *Status Bar* in the section *Productivity Hints*.

4 JD Edwards Configurations

JD Edwards Configurations



This folder is used to store predefined sample versions of configurations that were created using the Configuration Assistant tool. JD Edwards Configurations are all shipped as read-only.

You can review all of the components of each configuration and use all or any portion as templates to create your own configurations. Use the Drag and Drop features of the configuration definition tools or standard editing functions to duplicate the functionality you want. For a description of Configuration Assistant tools you can use to duplicate any functionality, see *Using Standard Editing Functions (Cut, Copy, Paste, Delete, Rename)*.

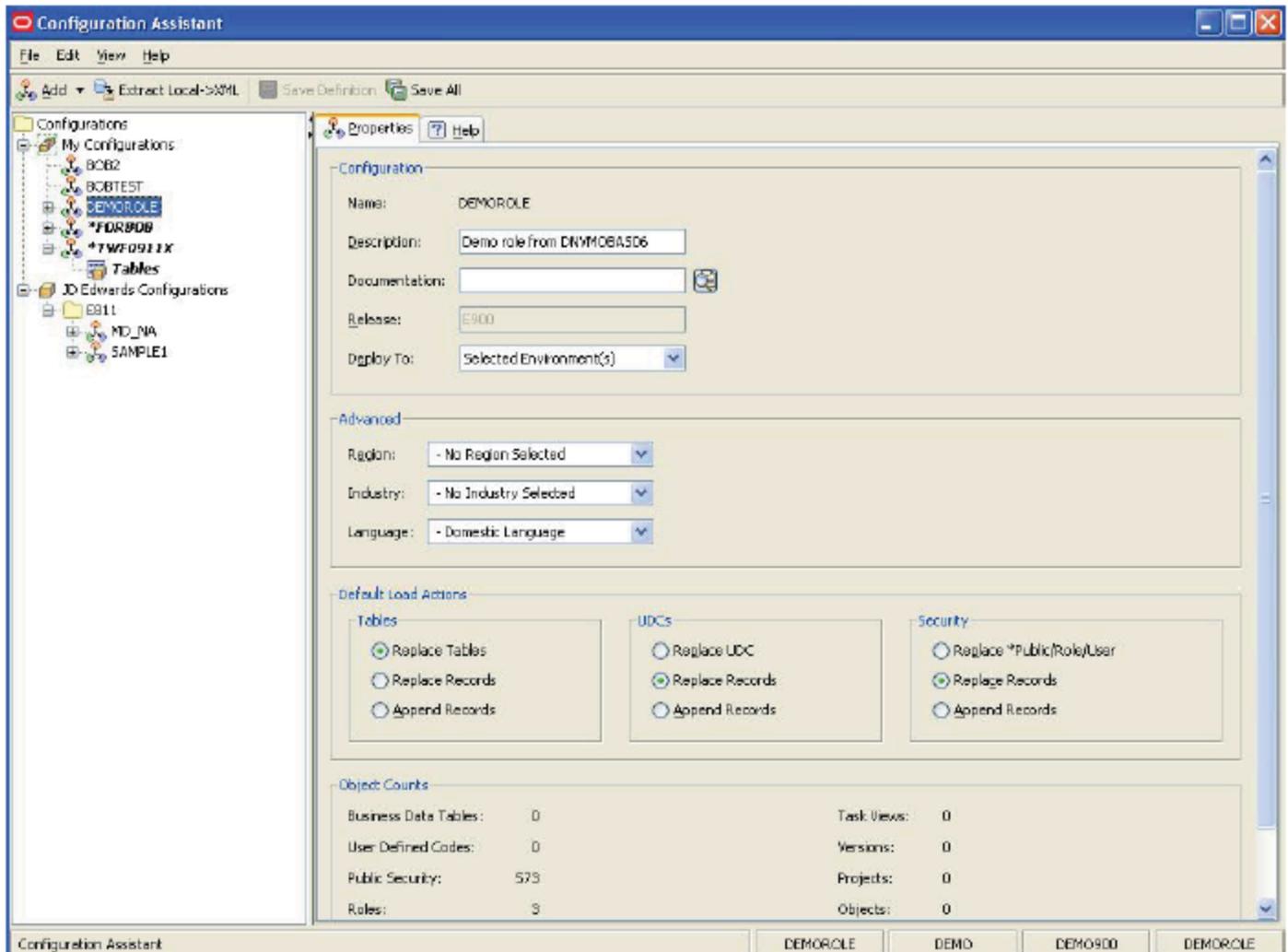
These subnodes of My Configurations are described separately:

- *Tables*
- *Tables*
- *OMW Projects and OMW Objects*
- *User Defined Codes*
- *Security*
- *Task Views*
- *Versions*
- The topic *Status Bar* in the section *Productivity Hints*.

5 Configuration Properties

Overview

To access the Properties of any configuration under My Configurations and JD Edwards Configurations, click on the node for the configuration.



The chapter describes these sections of the Properties screen for configurations:

- *Configuration*
- *Advanced*
- *Default Load Actions*
- *Object Counts*

Configuration

The Configuration section of Configuration Properties describes these fields:

- Name

Displays the name of the configuration selected in the Configurations tree view, either in the My Configuration or JD Edwards Configurations node. This name was defined when the configuration was created, and is not editable.

- Description

Displays a description of the selected configuration. This Properties Configuration field is editable in this view.

CAUTION: This field can contain a maximum of 30 characters.

- Documentation

Optionally, you can attach documentation to be delivered with your configuration. For example, you may want to include some special installation instructions for your configuration in the form of an HTML file. Documentation that is attached by using this field will be displayed in the Task Assistant, which should be associated with each task in the load schedule.

There is no restriction on the file types that you can attach as documentation.

You can only attach a single physical file from this field.

Tip:

If you want to include multiple files as documentation, you can compress them into a single file and attach the compressed file. Alternately, you can include the documentation (or any other files) that you want to include in an extracted configuration by placing them in this directory `<Solution Directory>/<solution name>/`

All contents of the `<solution name>` directory are automatically included in the `.par` file created by Configuration Assistant when it performs an Extract. However, even though the files are delivered to a source location using this method, they are not associated with a task as they would be if you used the Documentation field.

See the definition of this directory in *Using Preferences*.

- Release

Configuration Assistant populates this value based JD Edwards EnterpriseOne release number that is printed on the machine on which Configuration Assistant is running at the time the configuration is created.

Tip: Although this Release value is programmatically determined when creating a configuration, an enhancement to Change Assistant allows configurations to be applied to any release. If there is a mismatch in the Release value during deployment, Change Assistant issues a warning that cautions the user that although cross release application of the configuration is allowed, it should not be done without *full knowledge of the consequences* and thoughtful testing.

- Deploy To:

Note: Use this option to limit the configuration consumer's deployment options when the extracted configuration is deploying by using Change Assistant. Using this option does not limit the use of Configuration Assistant.

Use the drop-down list to select the environments to which to deploy:

- Selected Environment(s)

Use this selection to deploy to any selected environment, which can include a local environment.

- Local Environment Only

Use this section to only deploy to a local environment, regardless of whether the environment is explicitly selected or not. When you select this option, all other selected environments are ignored.

- Local and Selected Environment

Use this selection to deploy to all selected environments including local environments, regardless of whether local environment is explicitly selected or not.

Advanced

The Advanced section of the Configuration Properties describes these fields:

- **Region**

The drop-down list is populated based on the UDC Description01 field for the region (01RS/RC).

For example:

ANZ - Australia/New Zealand

- **Industry**

The drop-down list is populated based on the UDC Description01 field for the industry (01RS/RI).

For example:

MD - Manufacturing and Distributing

CAUTION:

The first time you define an industry or region in a configuration the data is retrieved based on the combination of the region and industry UDC values specified. If you subsequently change the industry or region UDC, your changed configuration will still contain the original data because the Configuration Assistant only changes the definition of the data within the configuration, not the data itself. When you extract the configuration, the Configuration Assistant assigns any versions with the changed value.

For example, if you first design a configuration based on the ANZ region, the Configuration Assistant pulls in all record types associated with that UDC. If you subsequently change the region to Singapore, then the previously retrieved data remains the same, while in the configuration the identifier for the records is changed from ANZ to SIN. When you extract the configuration, the Configuration Assistant changes the identifier for Versions from ANZ to SIN. As a result, when the configuration is loaded into a target environment, there are no artifacts from the ANZ region.

CAUTION: For UDC values for the 01RS/RC and 01RS/RI tables other than the defaults provided by JD Edwards EnterpriseOne:

- Customers should use values in the range of 900 to 999 for their configuration.
- Business partners should contact Oracle to obtain a unique code.

- **Language**

Configuration Assistant populates a drop-down list of languages based on the values of UDC 01/LP. When you select a language from this drop-down, the translation table (that is, "D" tables) records for UDCs and Task Views are included in your configuration.

For example, a language selection in the drop-down might be:

P - Portuguese

Note: Specifying a language pulls language records into your configuration for UDCs and Task Views only. If you want to include the entire translation table for these, or any other data, you must specifically include translation tables in the *Tables* section of your configuration definition.

Default Load Actions

The Default Load Actions section of Configuration Properties consists of these sections:

- *Tables*
- *UDCs*
- *Security*

Tables

Use the options to select a data load action into your database when the configuration data is loaded for your target environment:

- **Replace Tables**

The table in the target environment will be replaced with the table in the configuration.

CAUTION:

If any records exist in the target tables to be replaced, they will be lost because Replace Table selection indicates that you want to replace the table with data from the portable archive created by Configuration Assistant.

You should always beware of data integrity concerns, especially in production data environments. See, *Backing Up Your Target Database Environment*.

- **Replace Records**

Table records in the target environment will be replaced with the records in the configuration table.

CAUTION:

Replace Records does not clear the table before it copies. It replaces records in the target with the same key. Any new records are appended.

You should always beware of data integrity concerns, especially in production data environments. See, *Backing Up Your Target Database Environment*.

- **Append Records**

Only records that do not exist in the target environment will be copied from the configuration tables.

CAUTION:

You cannot create a configuration to extract and deliver an empty table. That is, you cannot define an empty table in your source environment to overwrite an existing populated table in your target environment.

You should always beware of data integrity concerns, especially in production data environments. See *Backing Up Your Target Database Environment*.

UDCs

Use the options to select a data load action into your database when the configuration data is loaded for your target environment:

- **Replace UDCs**

The UDCs in the target environment will be replaced with the UDCs in the configuration.

CAUTION:

If any UDCs exist in the target tables to be replaced, they will be lost because this selection indicates that you want to replace the UDC with data from the portable archive created by Configuration Assistant.

You should always beware of data integrity concerns, especially in production data environments. See *Backing Up Your Target Database Environment*.

- **Replace Records**

Table records in the target environment will be replaced with the records in the configuration table.

CAUTION:

Replace Records does not clear the table before it copies. It replaces records in the target with the same key. Any new records are appended.

You should always beware of data integrity concerns, especially in production data environments. See *Backing Up Your Target Database Environment*.

- **Append Records**

Only records that do not exist in the target environment will be copied from the configuration tables.

CAUTION:

You cannot create a configuration to extract and deliver an empty table. That is, you cannot define an empty table in your source environment to overwrite an existing populated table in your target environment.

You should always beware of data integrity concerns, especially in production data environments. Refer to *Backing Up Your Target Database Environment*.

Security

Use the options to select a data load action into your database when the configuration data is loaded into your target environment:

- **Replace *Public/Role/User**

*Public/Role/User in the target environment will be replaced with *Public/Role/User in the configuration.

CAUTION:

If any *Public/Role/User exists in the target tables to be replaced, they will be lost because this selection indicates that you want to replace *Public/Role/User with data from the portable archive created by Configuration Assistant.

You should always beware of data integrity concerns, especially in production data environments. See [Backing Up Your Target Database Environment](#).

- **Replace Records**

Table records in the target environment will be replaced with the records in the configuration table.

CAUTION:

Replace Records does not clear the table before it copies. It replaces records in the target with the same key. Any new records are appended.

You should always beware of data integrity concerns, especially in production data environments. See [Backing Up Your Target Database Environment](#).

- **Append Records**

Only records that do not exist in the target environment will be copied from the configuration tables.

CAUTION:

You cannot create a configuration to extract and deliver an empty table. That is, you cannot define an empty table in your source environment to overwrite an existing populated table in your target environment.

You should always beware of data integrity concerns, especially in production data environments. See [Backing Up Your Target Database Environment](#).

Object Counts

This section provides quantity statistics of the selected configuration for these individual items:

- Business Data Tables
- User Defined Codes
- Public Security

- Roles
- Users
- Task Views
- Versions
- Projects
- Objects

6 Tables

Overview

The Tables node lists and describes JD Edwards EnterpriseOne tables that are available in Configuration Assistant. You typically use Configuration Assistant with configuration tables and not transactional tables. Oracle provides a way to identify just the configuration tables using the *Search* and *All Tables* functions.

Tip: In addition to the tables that Configuration Assistant automatically identifies as transactional, you can manually select D tables if you need them.

CAUTION: Because JD Edwards EnterpriseOne Tools Release 8.98 uses the XML format, if the target table has new columns, the database default value for the new column is used for each record added. It is recommended that configurations containing such tables should not be done without *full knowledge of the consequences* and thoughtful testing.

You can include all or a subset of these tables in your configuration. Because Configuration Assistant retrieves the tables from the JD Edwards EnterpriseOne database, it provides a set of known and assigned attributes assigned to these tables, which are helpful in determining their contents and suitability for inclusion in your configuration:

- Table number (as assigned by JD Edwards EnterpriseOne)
- Number of rows in the table
- Load action (as defined with Configuration Assistant; the action that will be performed in the target environment for this configuration)
- Data class
- Copy data
- Description
- Object use
- System code
- Reporting code
- Data source

To populate the Tables node, you can use these tabs:

- *Search*
- *All Tables*

Note: These topics in the Productivity Hints:

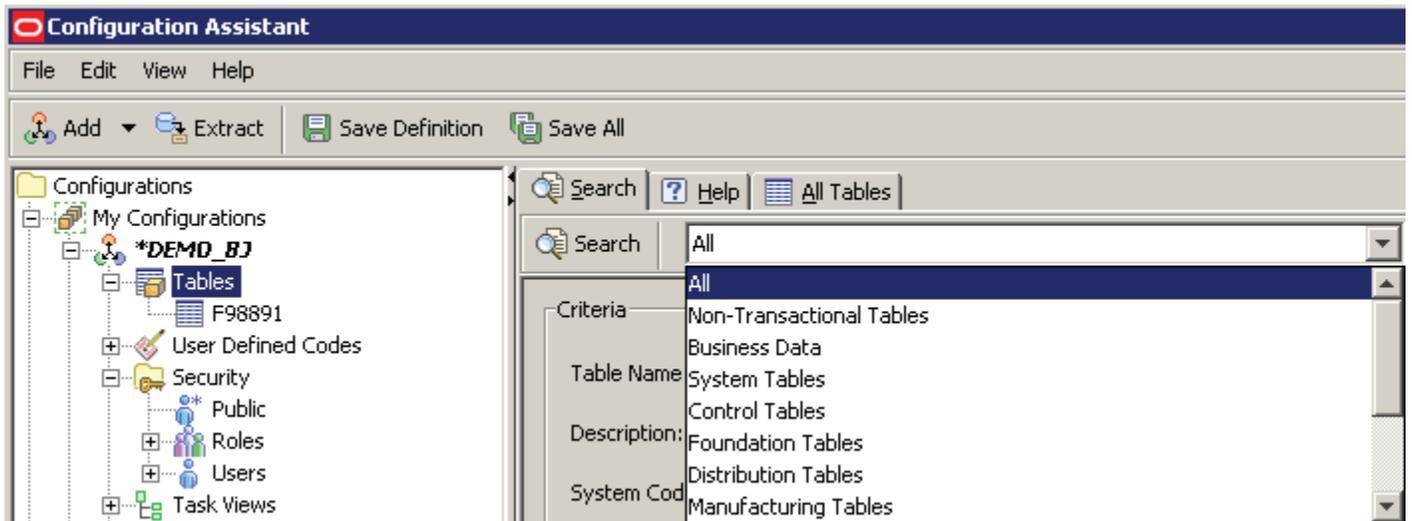
- *Adding or Removing Items to Your Configuration*
- *Edit Functions in Specific Nodes*
- *Folder Structure in the Configuration Assistant*
- *Icons Used by Configuration Assistant*
- *Multiple Selects and Deselects*
- *Panes in the Configuration Assistant*
- *Search Drop-Down List - Selecting All*
- *Search Results*
- *Search Strings - Valid Delimiters*
- *Search Strings - Wild Cards*
- *Sorting Within Columns in a Grid*
- *Status Bar*

Search

With the Tables node selected, the Search tab provides these functions:

- Search button

- Drop-down lists (predefined database query)



Drop-down lists include predefined database queries. When you make a selection the Table Name field is automatically populated with the table names associated with the selection. These drop-down lists of predefined database queries and their predefined tables are:

- Non-Transactional Tables

The list of tables was created by Oracle applications development. It does not include any system code 74, 75, or 76 tables. When you choose this search type the Table Name field is automatically populated with the list, which includes hundreds of tables. To view the complete list, you can manually copy the contents out of the field display and into a readable form.
- Business Data

Includes all tables that have a data class of B, which is automatically populated in the applicable Criteria field.
- System Tables

Includes all tables that have a data class of S, which is automatically populated in the applicable Criteria field.
- Control Tables

Includes all tables that have a data class of T, which is automatically populated in the applicable Criteria field.
- Foundation Tables

Includes all tables for system code 00.
- Distribution Tables

Includes all tables for system codes 40, 41, 42, 43, 43Q, 45, 46, 49, 40, 40G, 40R, 41B, 43C, 43E, 46L, and 46R.
- Manufacturing Tables

Includes all tables for system codes 30, 31, 31B, 32, 34, 37, 40, 41, F30L, F31, F31K, and F34R.

- Search Criteria Fields
 - Table Name
 - Description
 - System Code
 - Reporting Code
 - Data Class
 - Copy Data Flag

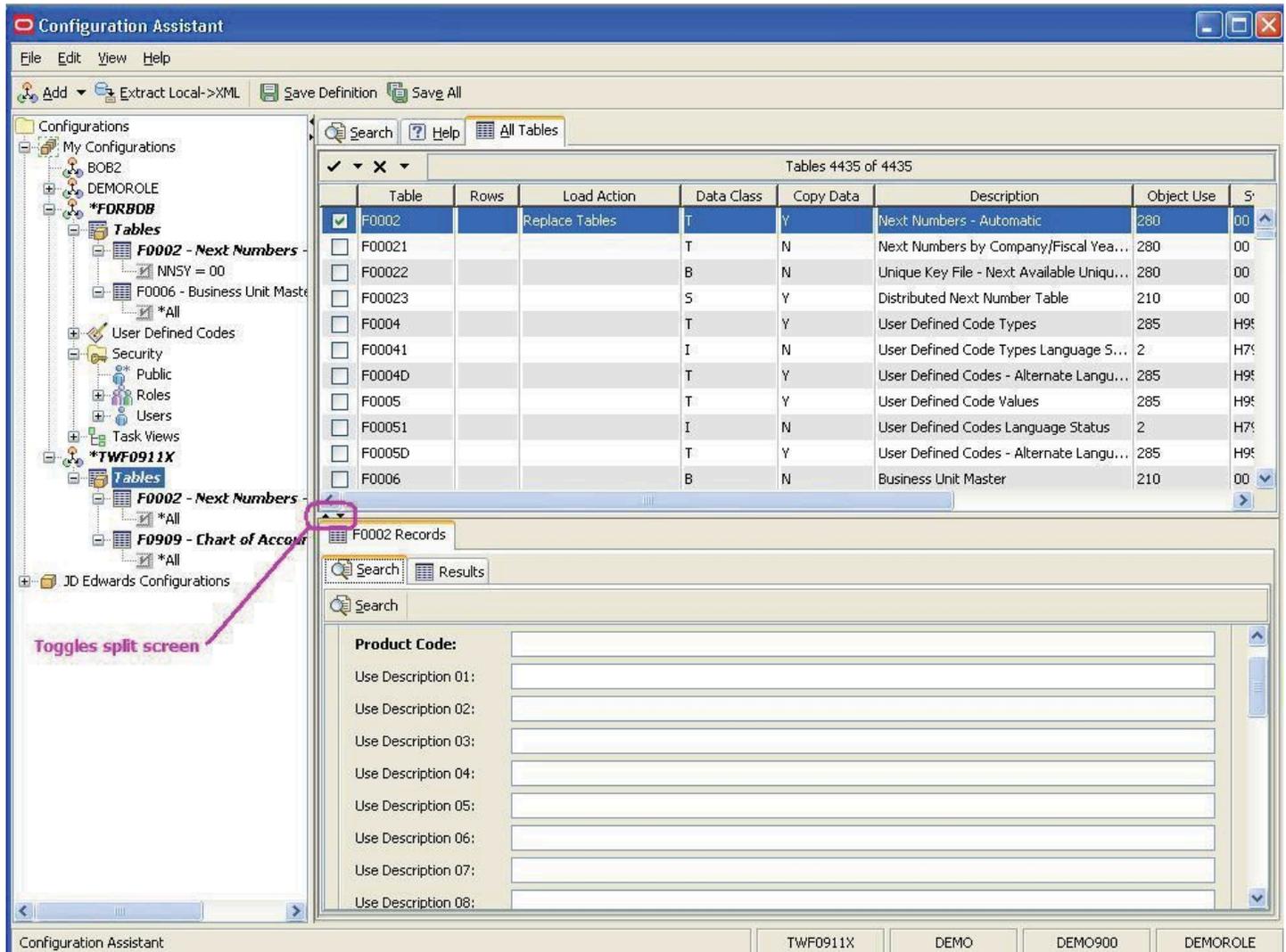
All Tables

When you select the Tables tab in the right panel, the Configuration Assistant displays a list of all JD Edwards EnterpriseOne tables in the Tables datasource for the environment you are logged in to.

The grid contains a variety of information about each table, including the current row count.

By default, the lists of Tables is shown with a split screen where the top portion lists all the tables, and the bottom portion is used to display the records in the specified table. You can click the up and down arrow in the separator bar to toggle the split screen on and off ("See the figure below for the location of the arrows.").

Note: The system performs the data retrieval and table analysis in a method that improves memory management. The table search starts the first time you click on the Table node of a configuration. The table record count is not calculated until you select a table. To select all tables with data, you can use the check drop-down list to select **Tables With Data**, which instructs the system to calculate the record count on all the tables. You can then deselect unwanted tables. For details about using the check option, see *Multiple Selects and Deselects*.



Note: The Tables tree node in the left pane displays subnodes for selected records if All Tables or Selected Tables are selected. The tree subnode shows record level detail such as ***All** records or the **Primary Key for Selected Records**.

You can use the lower half of the All Tables split panel to search and select individual records within a table. To view a specific record within a table, use the checkbox in the top half of the split panel to select a table. The bottom half of the

split panel displays each record, where boldfaced entries indicate key fields (not necessarily the Primary Key). To search for specific key values within a record, enter a value in the data entry field on the Search panel and click the Search tab. Individual Results tabs are created to display the results of each search.

CAUTION: A value of blank in any field indicates a wild card search for any value. Because tables with a large number of records can consume more memory than available, Configuration Assistant displays a warning if a search is going to return too much data. In this case, you should either narrow the search or select the entire table.

Tip: Hover Text: You can hover over any field description within a record to ascertain the literal key name. For example, in F0002, if you hover on Product Code the key name NNSY is displayed.

Tip: None Exist Icon: This icon in the Rows column of a listed table indicates an error condition for a table. For example, it could indicate a table specification mismatch, that a DD item is missing, or that the table does not exist in the datasource to which it is mapped.

7 OMW Projects and OMW Objects

Overview

You can include all or a subset of OMW Projects and OMW Objects in your configuration. As it retrieves the OMW Projects and OMW Objects from the JD Edwards EnterpriseOne database, Configuration Assistant provides a set of known and assigned attributes assigned to these projects, which are helpful in determining their contents and suitability for inclusion in your configuration:

OMW Projects

- Project Name
- Description
- Status
- Type
- System Code
- Release

OMW Objects

- Object
- Status
- Type
- System Code
- Reporting Code

To populate the OMW Projects node, you can use these tabs:

- *Search*
- *All Projects*

Note: These topics in the Productivity Hints:

- *Adding or Removing Items to Your Configuration*
- *Edit Functions in Specific Nodes*
- *Folder Structure in the Configuration Assistant*
- *Icons Used by Configuration Assistant*
- *Multiple Selects and Deselects*
- *Panes in the Configuration Assistant*
- *Search Drop-Down List - Selecting All*
- *Search Results*
- *Search Strings - Valid Delimiters*
- *Search Strings - Wild Cards*
- *Sorting Within Columns in a Grid*
- *Status Bar*

Search

With the OMW Projects node selected, the Search tab provides these functions:

- Search button
- Drop-down selection (All)
- Search Criteria Fields:
 - Project Name
 - Description
 - System Code
 - Status
 - Type
 - Release

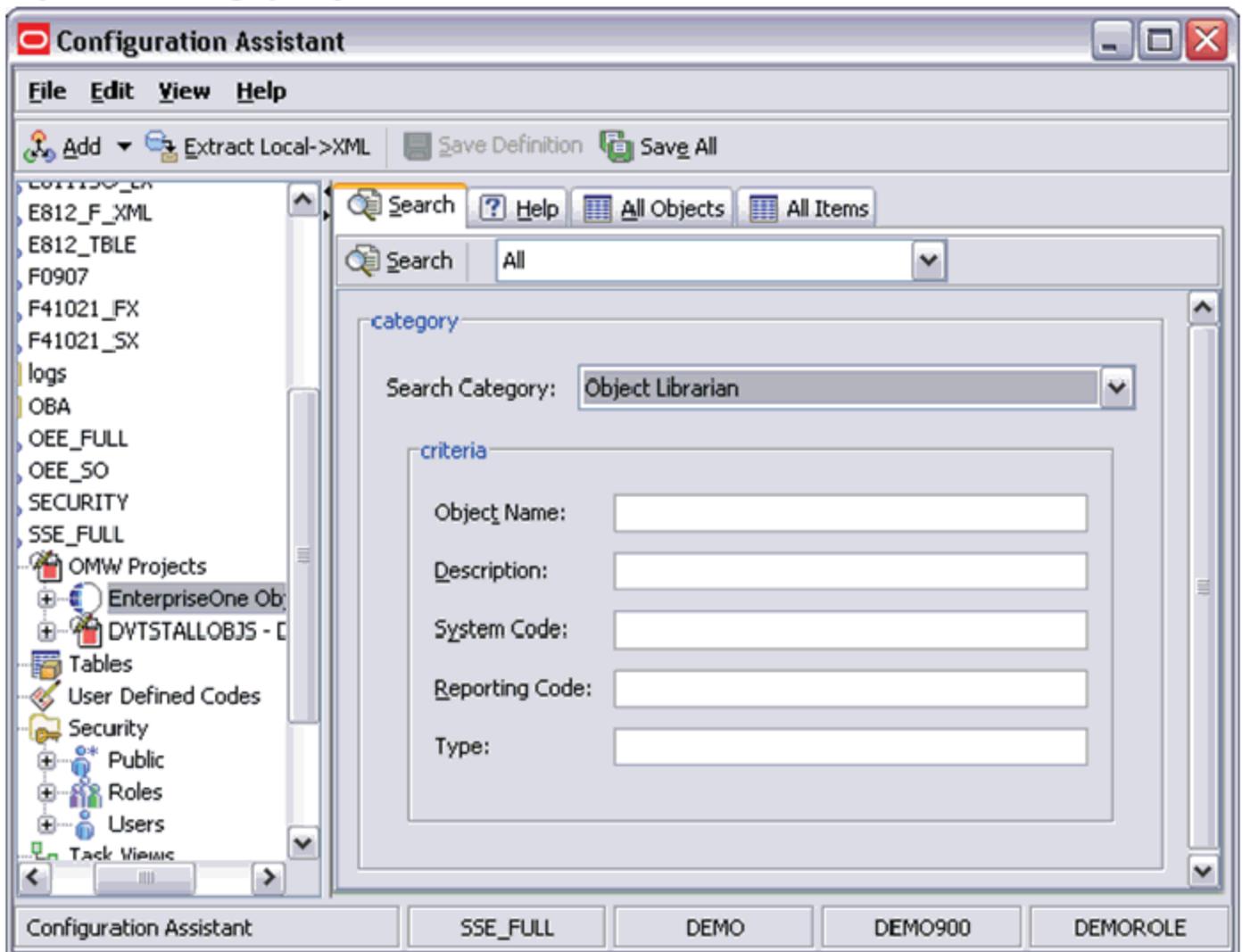
Under the OMW Projects node, with the EnterpriseOne Objects node selected, you can choose from these object search categories:

- Object Librarian (APPL, BSFN, BSVW, DSTR, TBLE, UBE)
- Data Dictionary

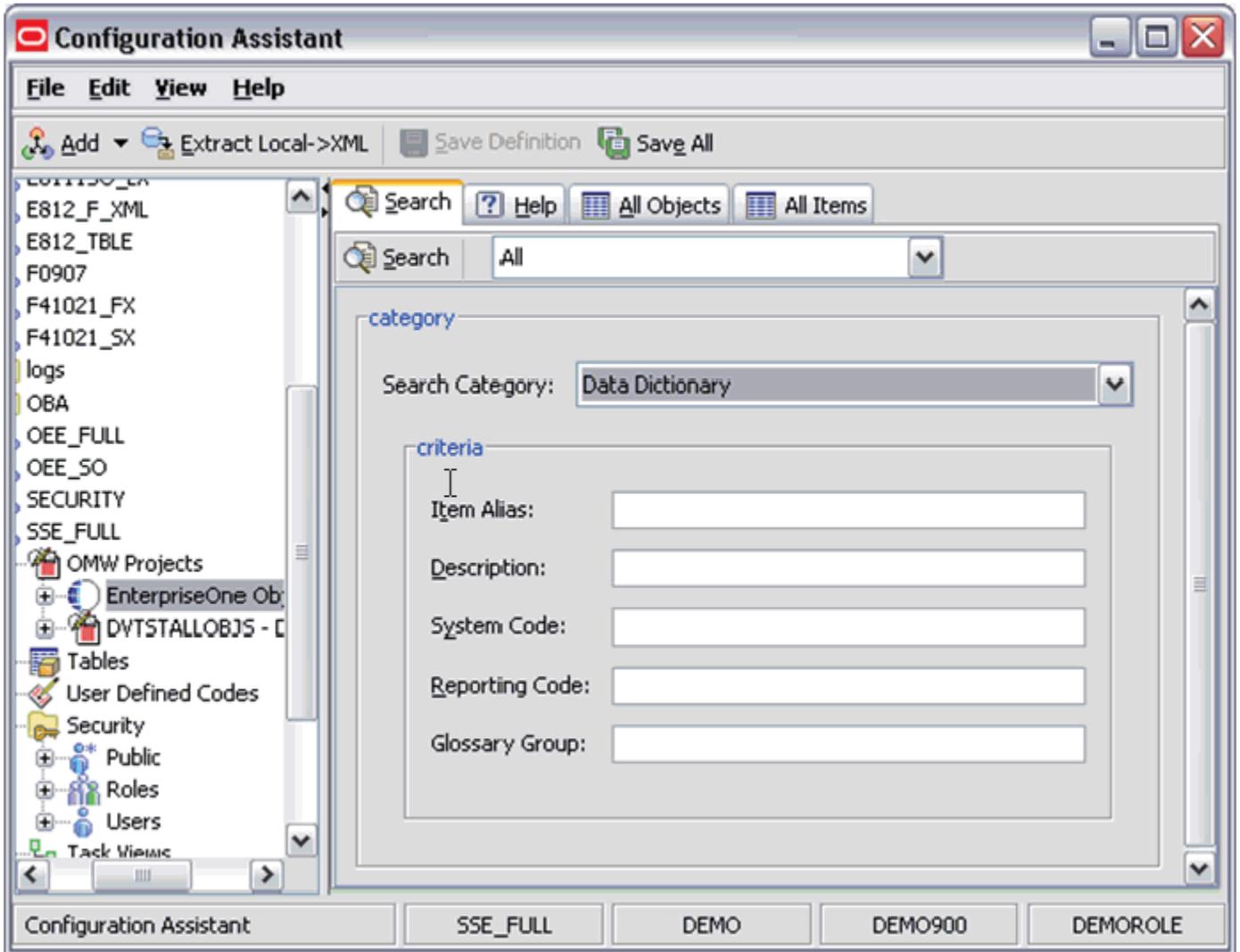
- OMW Project
- Workflow
- User Overrides
- Business Service Property
- Report Definition
- XMLP Publisher Object (Business Intelligence)

The following screens show example searches for each of the above listed object search categories.

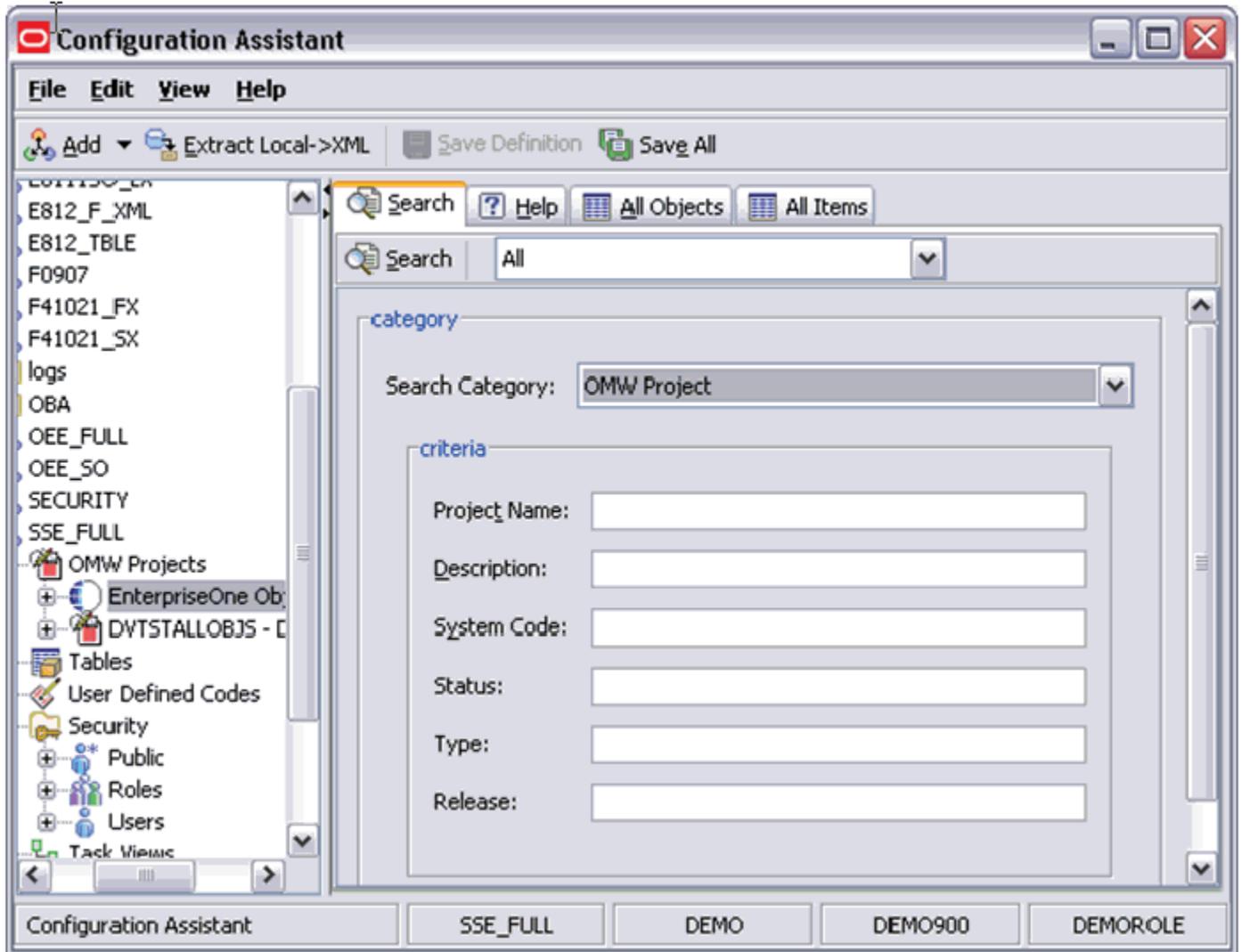
Object Search Category: Object Librarian



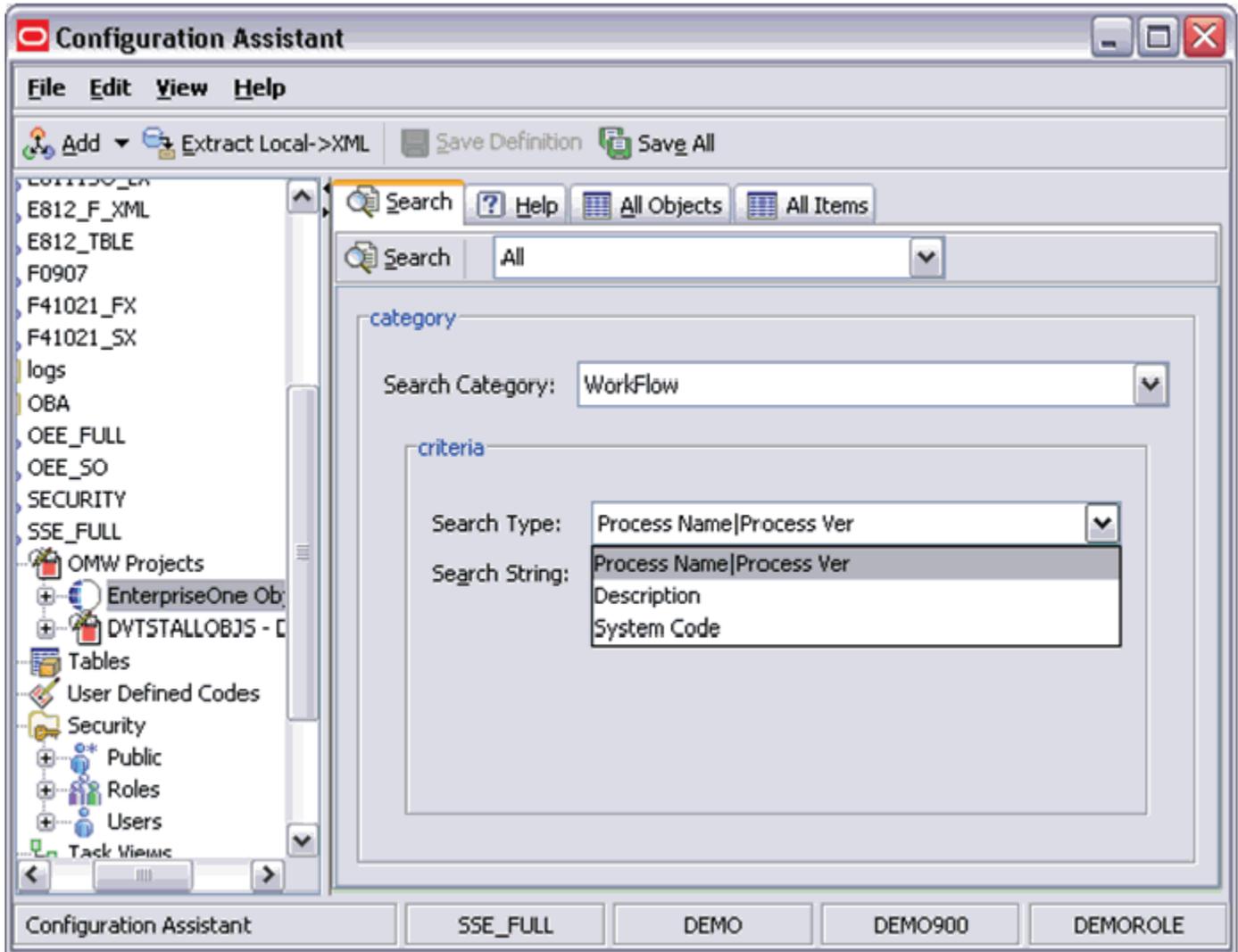
Object Search Category: Data Dictionary



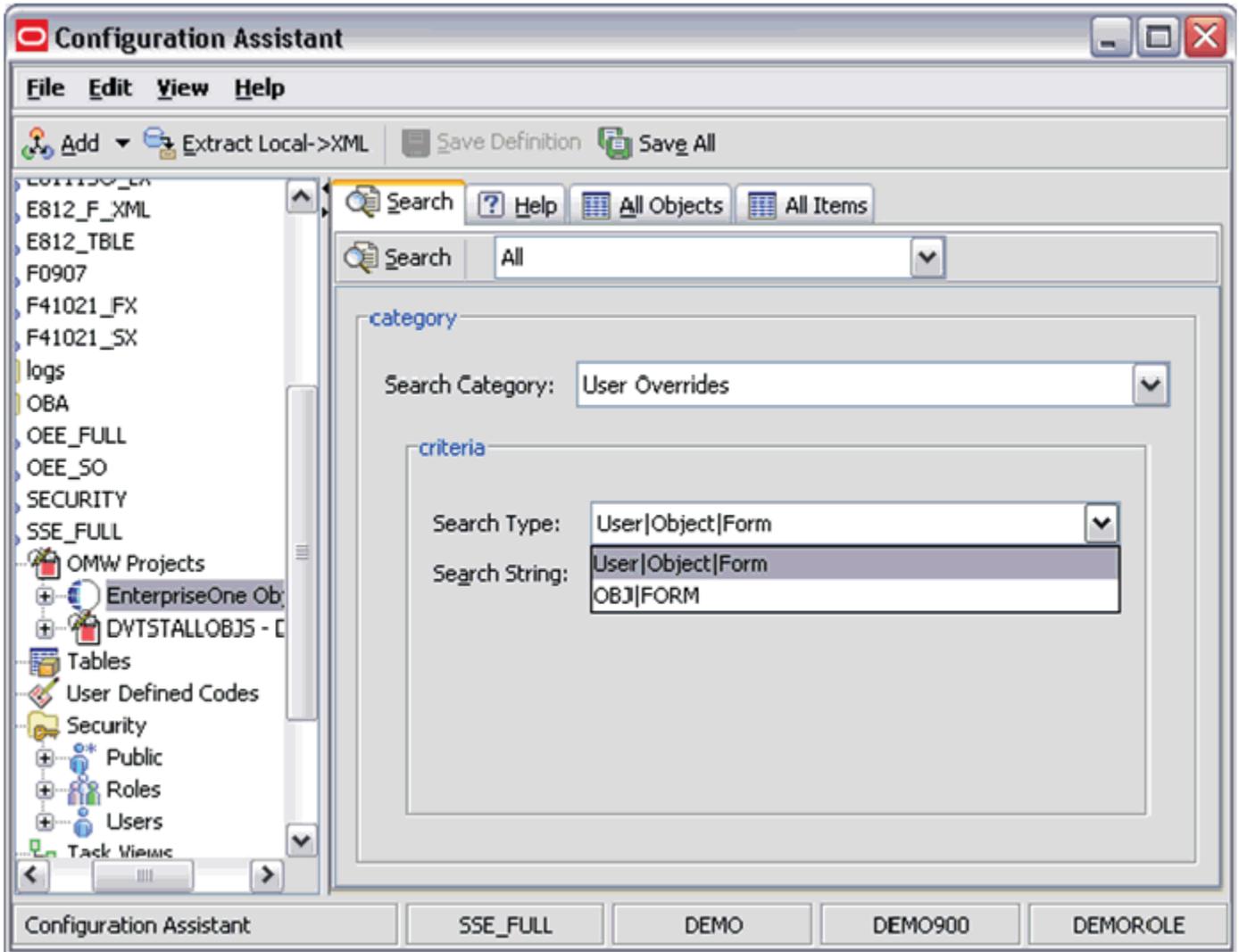
Object Search Category: OMW Project



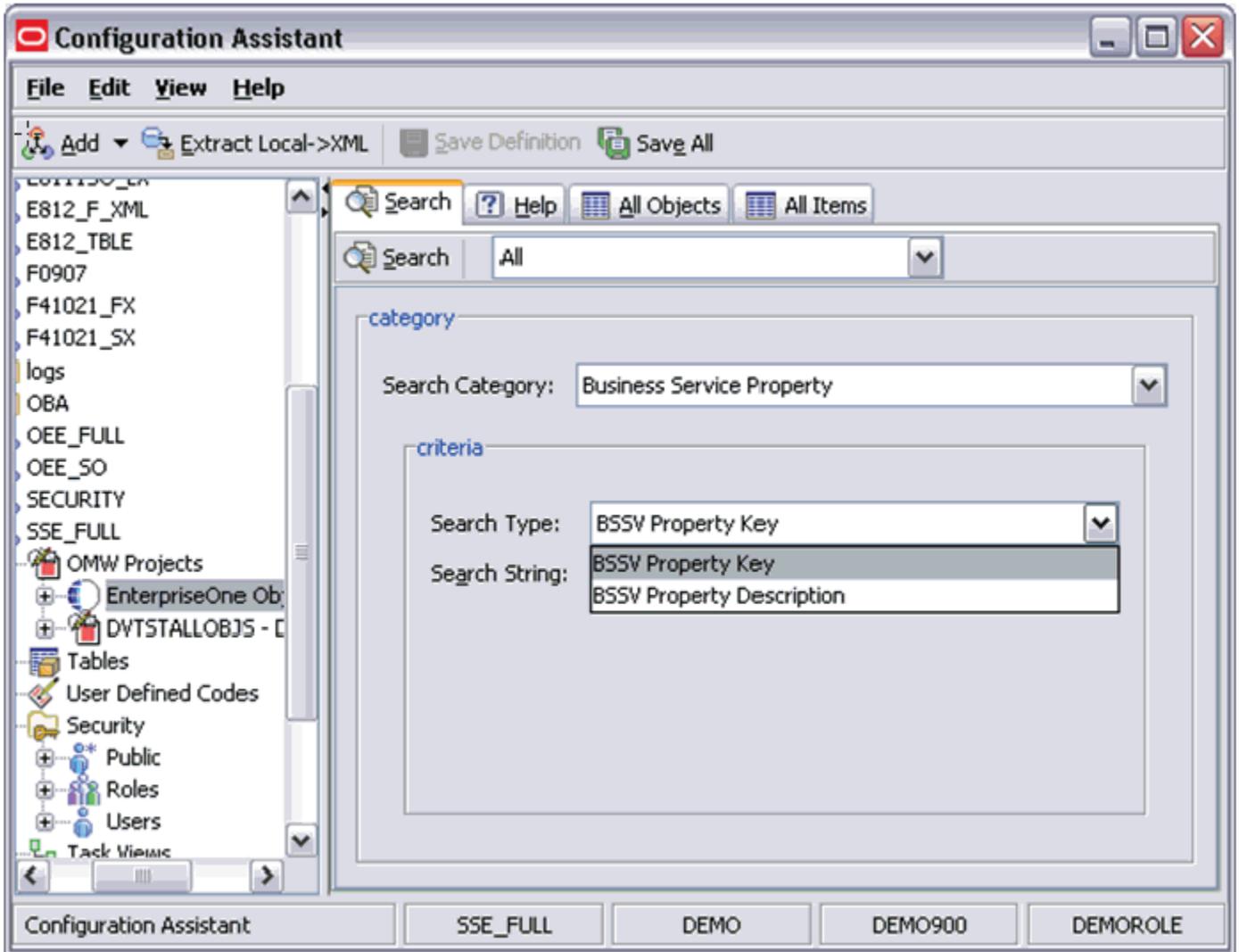
Object Search Category: Workflow



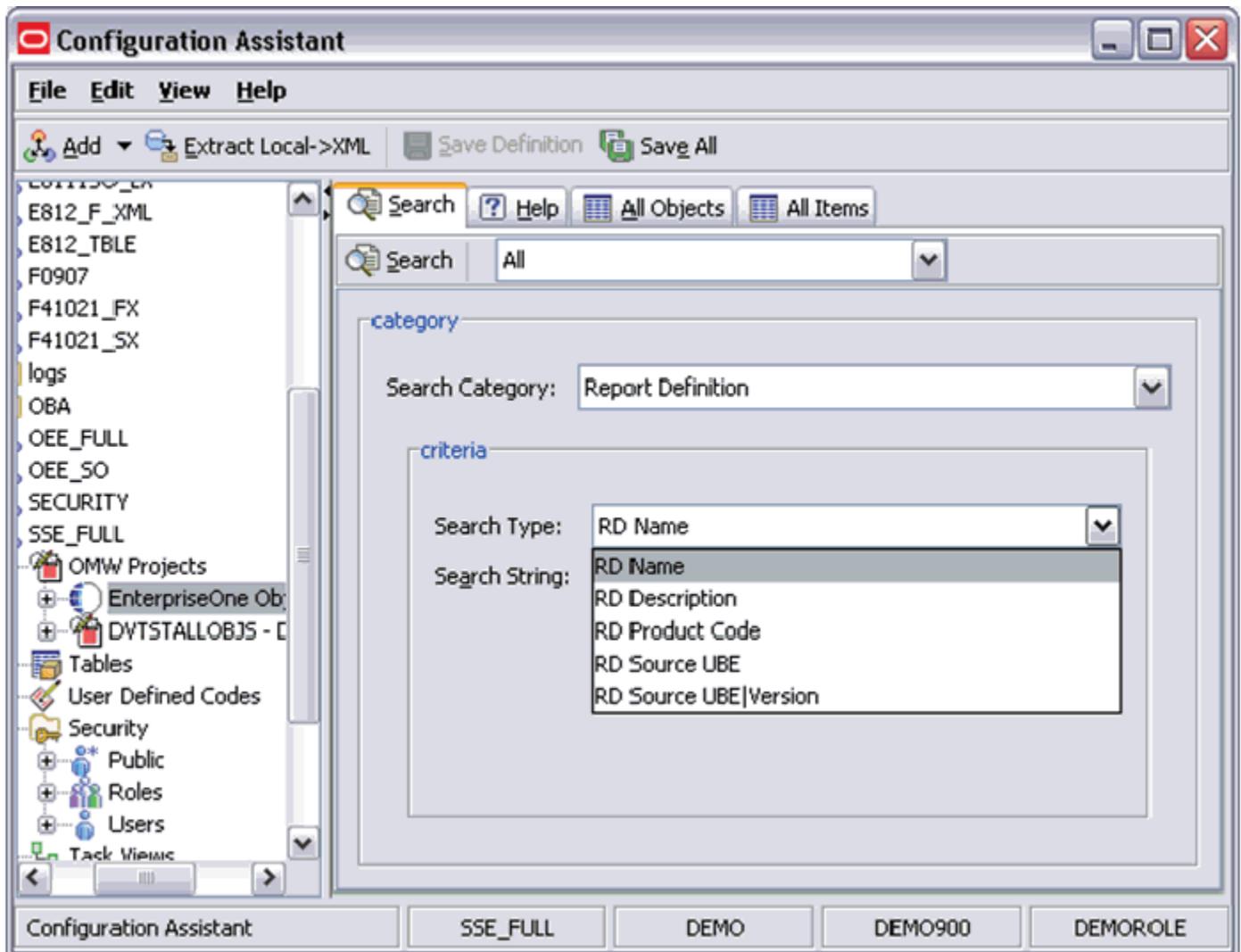
Object Search Category: User Overrides



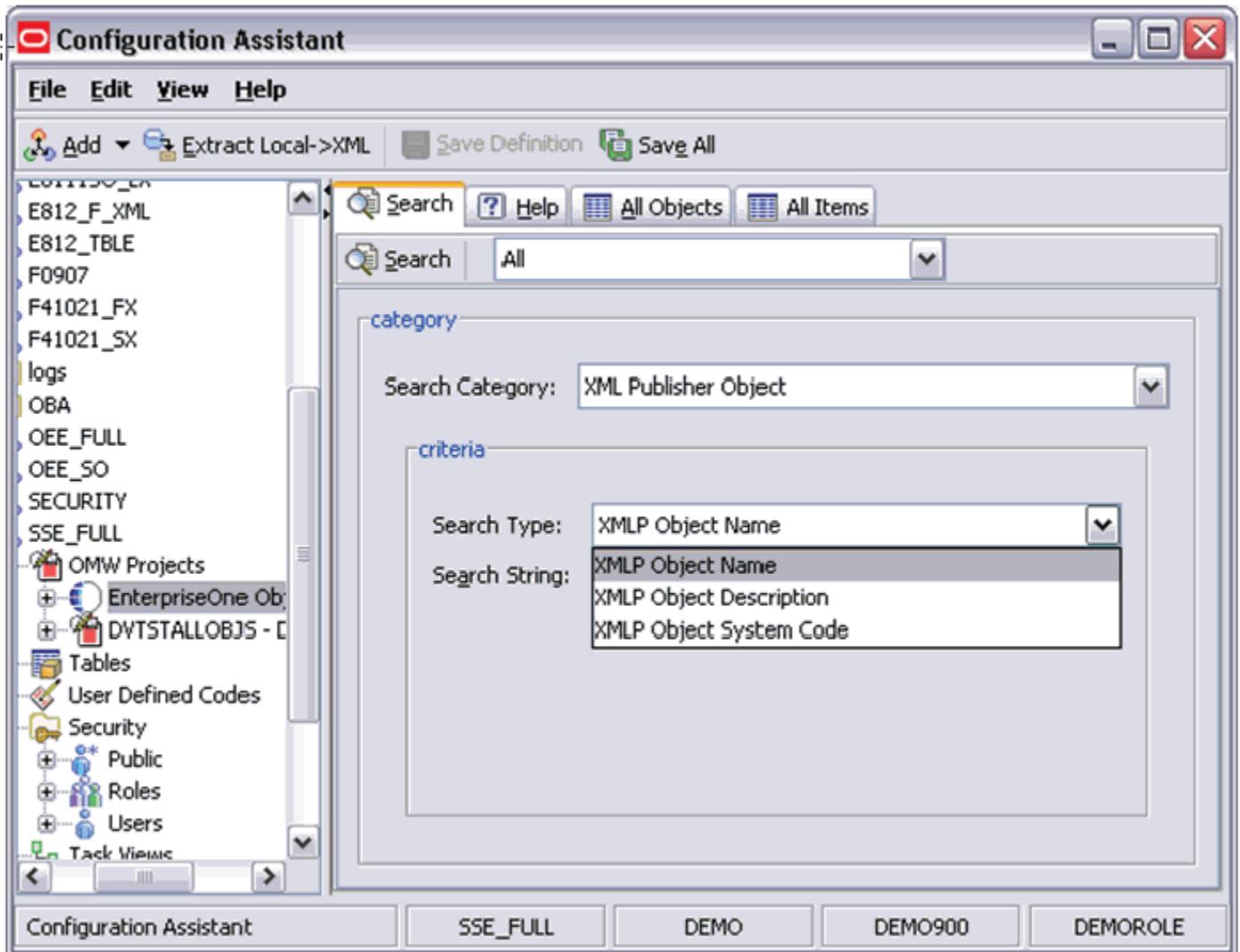
Object Search Category: Business Service Property



Object Search Category: Report Definition



Object Search Category: XMLP (Business Intelligence)



All Projects

When you select the Tables tab in the right panel, Configuration Assistant displays a list of all JD Edwards EnterpriseOne OMW Projects and OMW Objects in the OMW Projects datasource for the environment that you are logged in to.

The grid contains a variety of information about each OMW Project and OMW Object.

The screenshot shows the Configuration Assistant window with the following components:

- Tree View (Left):** Shows a hierarchy of configurations including 'My Configurations' (with sub-items *AZMDALL001, *BOBS, Tables, DMW Projects, EnterpriseOne Obj, T1) and 'JD Edwards Configurations' (with sub-items E811, MD_NA, SAMPLE1).
- Top Table: OMWProjects 11 of 11**

Project	Description	Status	Type	System Code	Release	
<input type="checkbox"/>	CFG_FRIDAY1	test 1	21	02	55	E900
<input type="checkbox"/>	CFG_FRIDA...	test 1	21	02	55	E900
<input type="checkbox"/>	CFG_FRIDAY2	friday pm	21	02	55	E900
<input type="checkbox"/>	CFG_SUND...	test jdeomw	21	02	55	E900
<input type="checkbox"/>	CFG_TEST	test	21	02	55	E900
<input checked="" type="checkbox"/>	DEMO	Default		04		E900
<input type="checkbox"/>	TRN00001	OMW Tour	21	02	55	E900
<input type="checkbox"/>	TRN00002	Example Project 1	21	02	56	E900
<input type="checkbox"/>	TRN00003	Example Project 2	26	02	56	E900
<input type="checkbox"/>	TRN00004	Example Project 3	28	02	56	E900
<input type="checkbox"/>	TRN00005	Example Project 4	21	02	56	E900
- Bottom Table: OMW Objects 4 of 4**

Object	Description	Type	System Code	Reporting C...	
<input type="checkbox"/>	40 PI	Item Price Groups	UDC	40	
<input type="checkbox"/>	R98403XB ...	Load Data Dictionary ...	UBEVER	H96U	H96U
<input type="checkbox"/>	R98403XB ...	Copy Control Tables t...	UBEVER	H96U	H96U
<input type="checkbox"/>	R98403XB ...	Language Update - C...	UBEVER	H96U	H96U
- Status Bar:** Shows 'BOBS saved' and buttons for 'BOBS', 'DEMO', 'DEMO900', and '*ALL'.

8 User Defined Codes

Overview

The User Defined Codes node lists and describes JD Edwards EnterpriseOne UDCs which Configuration Assistant has identified from the data source. You can include all or a subset of these UDCs in your configuration. Because Configuration Assistant retrieves the UDCs from the JD Edwards EnterpriseOne database, it provides a set of known and assigned attributes assigned to these tables, which are helpful in determining their contents and suitability for inclusion in your configuration. Different attributes are displayed in the right pane depending on the level of detail:

- Upper part of right pane
 - Product Code
 - Code Type
 - Description
- Lower part of right pane
 - Product Code
 - Code Type
 - Value
 - Description 01
 - Description 02

Note: For any selected records, the non-changeable default load action is to replace records.

CAUTION: Some UDCs contain technical values related to your JD Edwards EnterpriseOne environment setup. Carefully consider how these might affect your target environment if you choose to extract all UDCs.

To populate the User Defined Codes node, you can use these tabs:

- *Search*
- *All User Defined Codes*

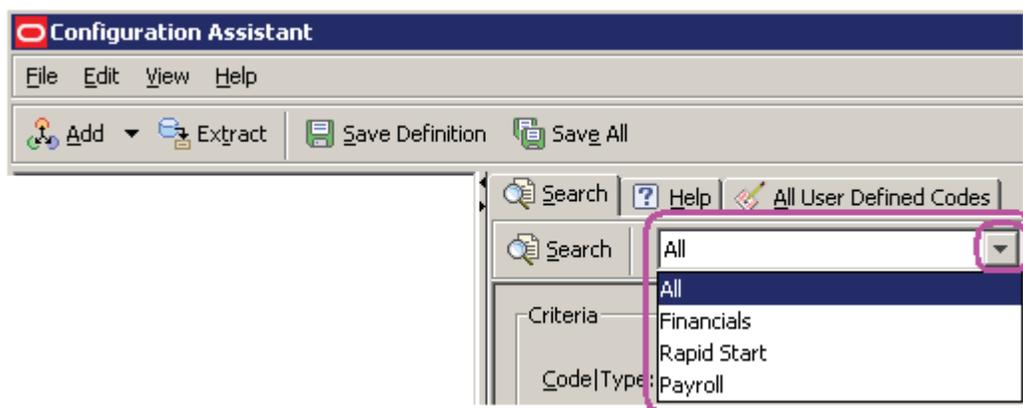
Note: These topics in the Productivity Hints:

- *Adding or Removing Items to Your Configuration*
- *Edit Functions in Specific Nodes*
- *Folder Structure in the Configuration Assistant*
- *Icons Used by Configuration Assistant*
- *Multiple Selects and Deselects*
- *Panes in the Configuration Assistant*
- *Search Drop-Down List - Selecting All*
- *Search Results*
- *Search Strings - Valid Delimiters*
- *Search Strings - Wild Cards*
- *Sorting Within Columns in a Grid*
- *Status Bar*

Search

With the User Defined Codes node selected, the Search tab provides these functions:

- Search button
- Drop-down list from predefined searches by industry or other category (for example, Financials)

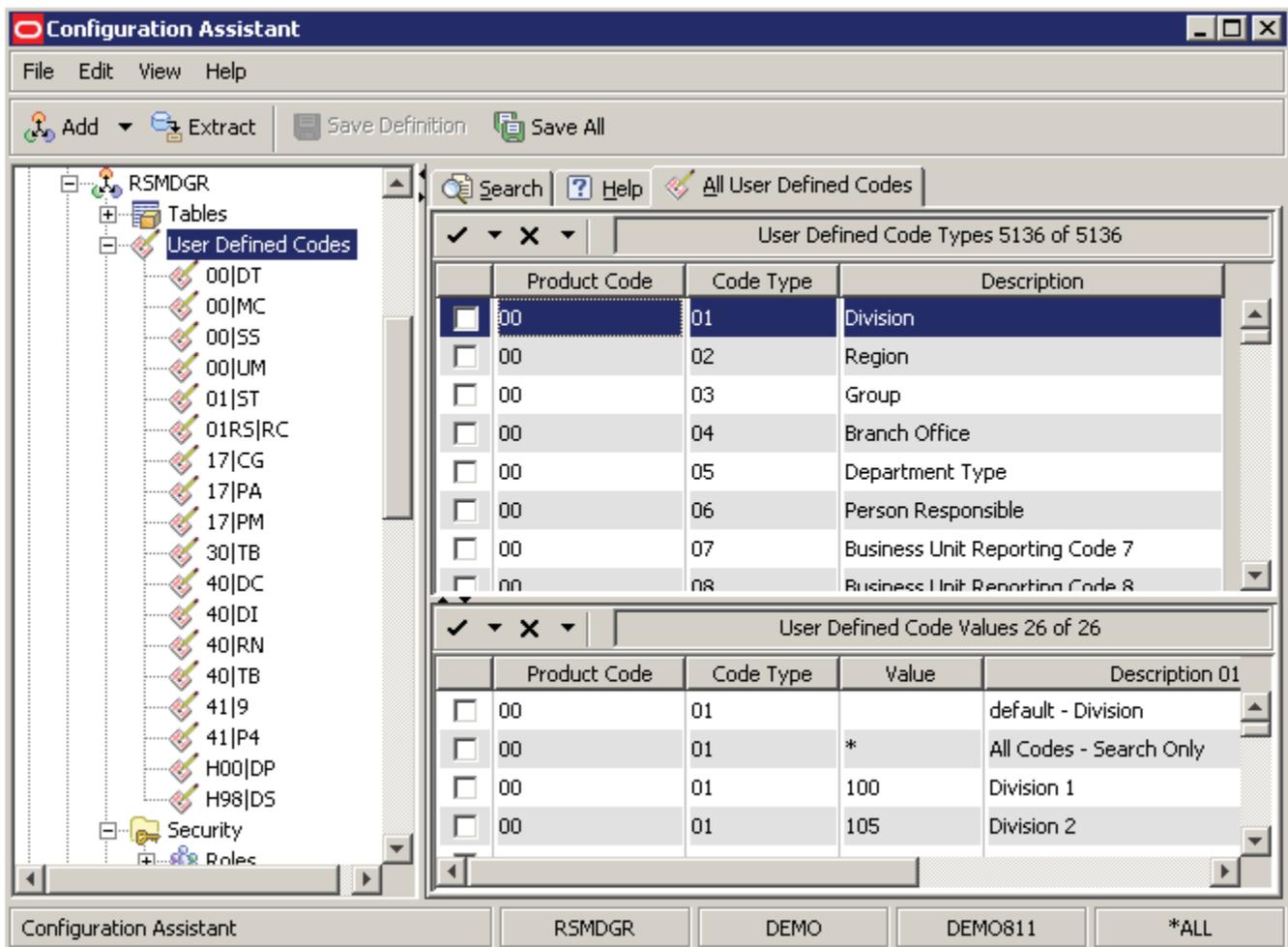


- Search Criteria fields:
 - Code|Type (combination search for code type pairs, for example: 01|AB and 02|CD)
 - Product Code
 - Code Type
 - Type Description
 - Value
 - Value Description 01
 - Value Description 02

All User Defined Codes

When you select the All User Defined Codes tab in the right panel, the Configuration Assistant displays a list of all JD Edwards EnterpriseOne UDCs in the User Defined Codes datasource for the environment you are logged in to.

The grid contains a variety of information about each UDC, including types and descriptions.



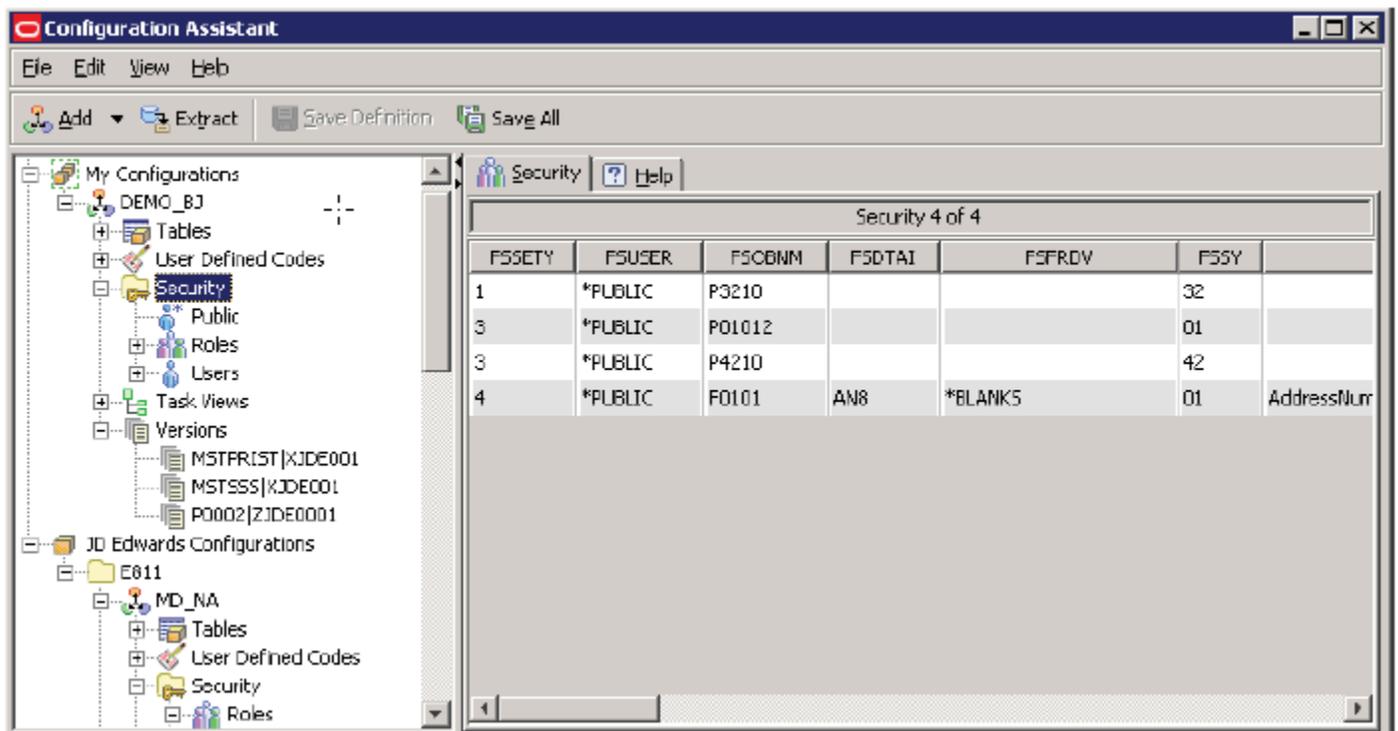
9 Security

Overview

The Security node contains these subnodes:

- *Public*
- *Roles*
- *Users*

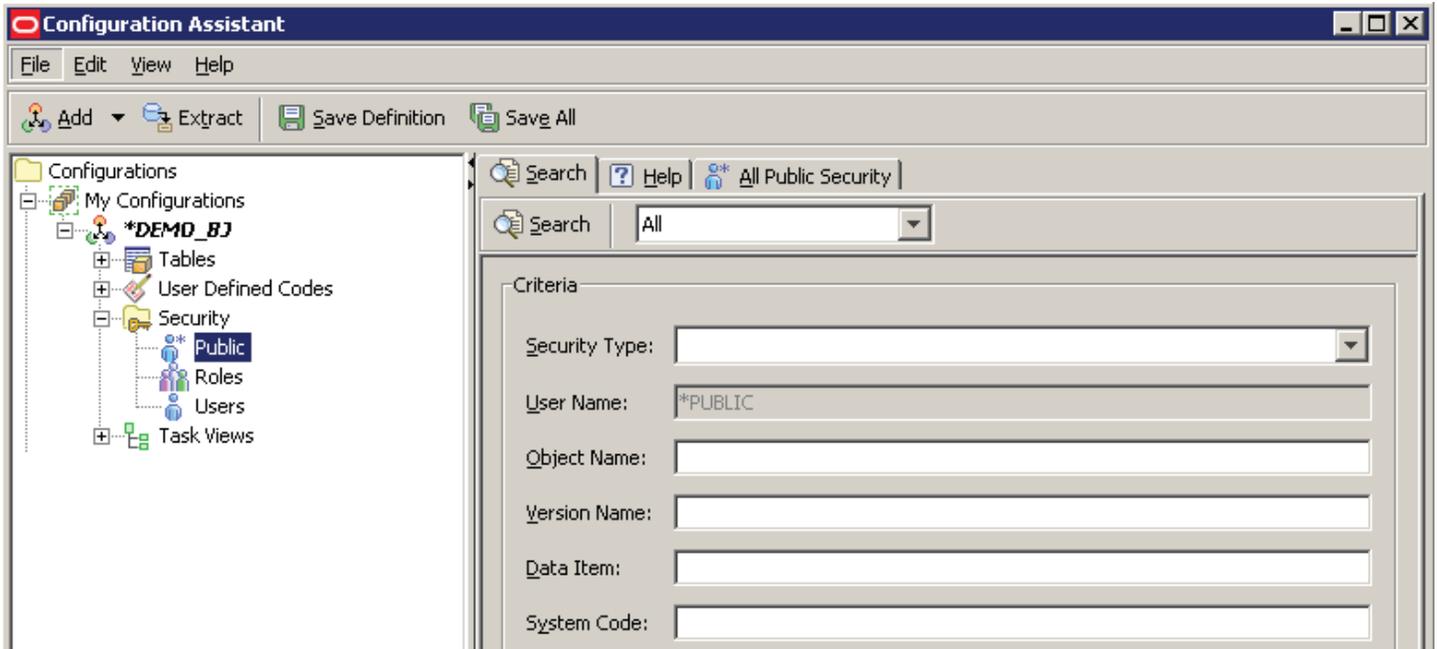
When you click the Security tab, the system displays a grid showing all currently defined security records for the selected node:



Note: These topics in the Productivity Hints:

- *Adding or Removing Items to Your Configuration*
- *Edit Functions in Specific Nodes*
- *Folder Structure in the Configuration Assistant*
- *Icons Used by Configuration Assistant*
- *Multiple Selects and Deselects*
- *Panes in the Configuration Assistant*
- *Search Drop-Down List - Selecting All*
- *Search Results*
- *Search Strings - Valid Delimiters*
- *Search Strings - Wild Cards*
- *Sorting Within Columns in a Grid*
- *Status Bar*

Public



With the Public node selected, the Search tab provides these functions:

- Search button
- Drop-down list from predefined searches

- Search Criteria fields:

- Security Type

You can use the drop-down list to select one of these security types:

1 - Action Security

2 - Column Security

3 - Application Security

4 - Row Security

5 - Processing Option Security

6 - Hyper Exit Security

7 - External Calls Security

- User Name

The system displays a static value of *PUBLIC for this field. This value cannot be changed.

- Object Name

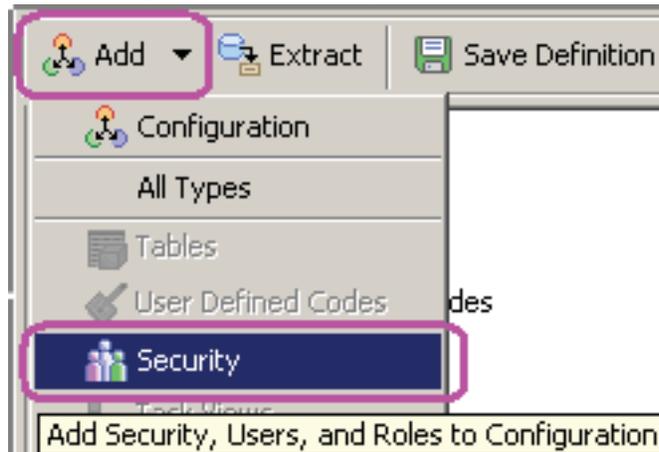
- Version Name

- Data Item

- System Code

Note: For any selected records, the non-changeable default load action is to replace records.

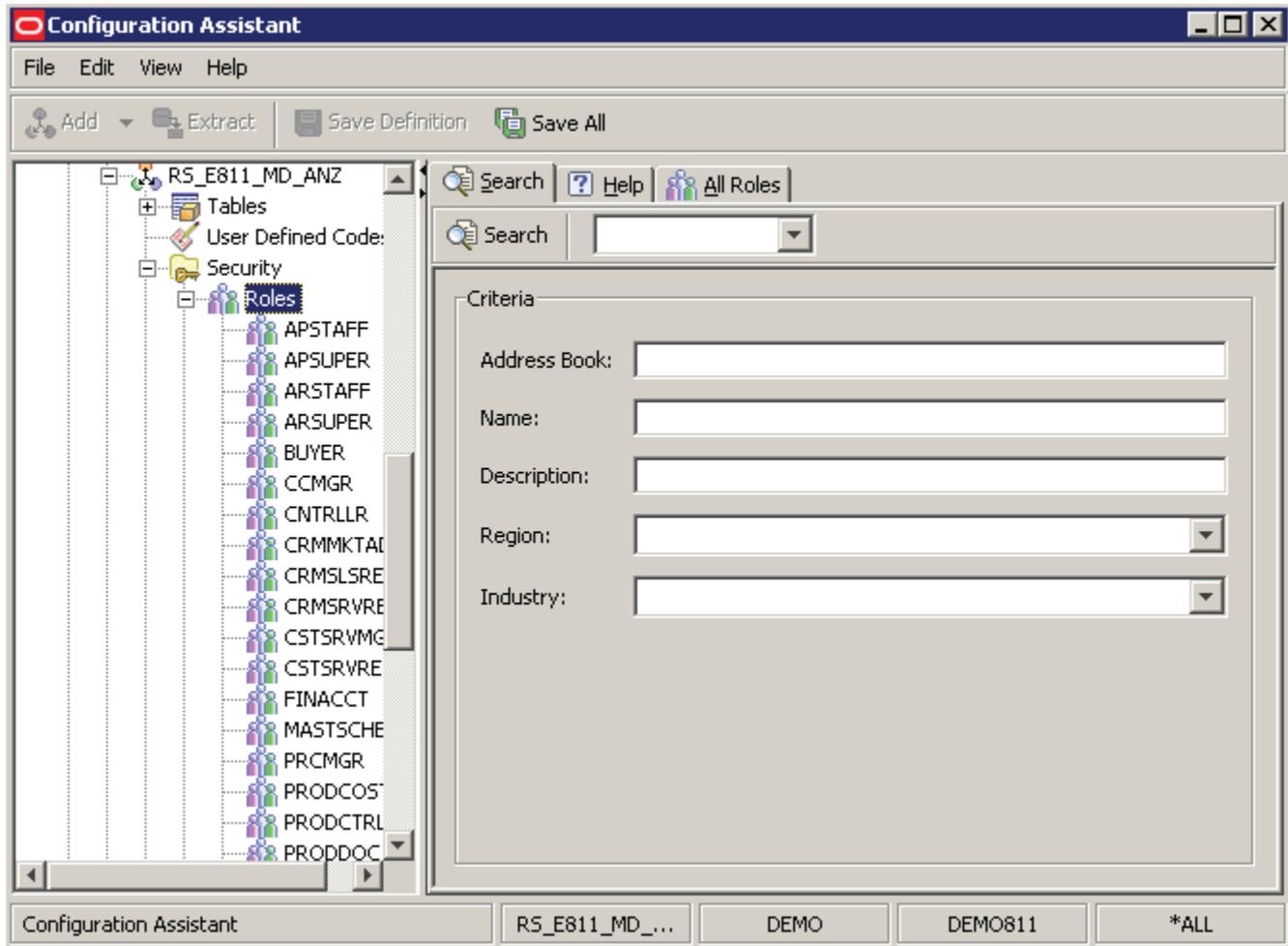
Tip: If you have a configuration that was created by a prior version of Configuration Assistant that did not support this function, the security node in the tree view will not have a Public node underneath it. You can add the Public node by using the Add > Security button.



This displays all three security nodes (Public, Role, User) underneath the Security node.



Roles



CAUTION: When you use Configuration Assistant to select User or Role records, the system also selects any corresponding security records that are set up for User and Role, including: Action, Solution Explorer, Environment, and Application. The system automatically tags the selected roles with the information provided for the Region and Industry fields that you used when you added the configuration properties while extracting the data.

With the Roles node selected, the Search tab provides these functions:

- Search button
- Drop-down list from predefined searches

- Search Criteria fields:
 - Address Book

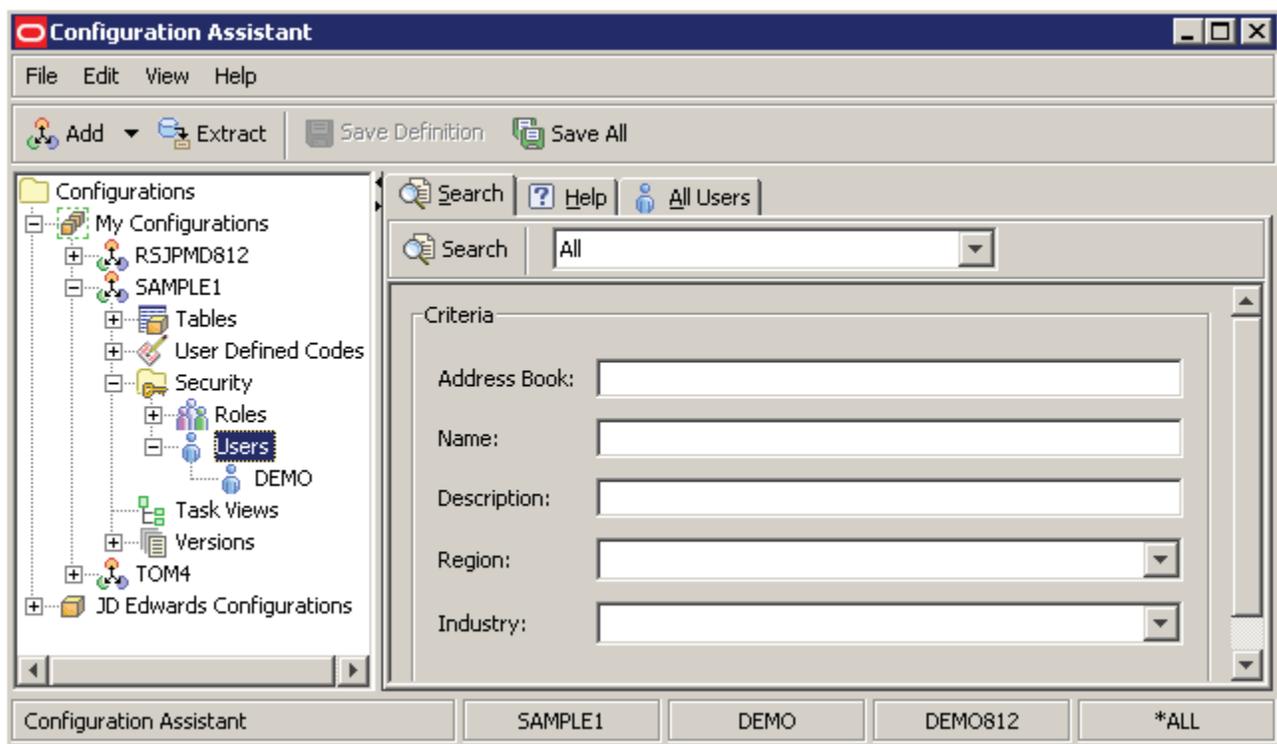
CAUTION: User input in this field is restricted to numeric data. No alpha characters are allowed in order to avoid database errors.

- Name
- Description
- Region
- Industry

Note: For any selected records, the non-changeable default load action is to replace records.

Tip: For searches, you can use the drop-down list to select from predefined values for the Region and Industry fields. See *Configuration Properties - Advanced Tab* for a description of the UDC values that are used by Configuration Assistant to complete the fields selected from the drop-down list.

Users



With the Users node selected, the Search tab provides these functions:

- Search button

- Drop-down list from predefined searches
- Search Criteria fields:
 - Address Book

CAUTION: User input in this field is restricted to numeric data. No alpha characters are allowed in order to avoid database errors.

- Name
- Description
- Region
- Industry

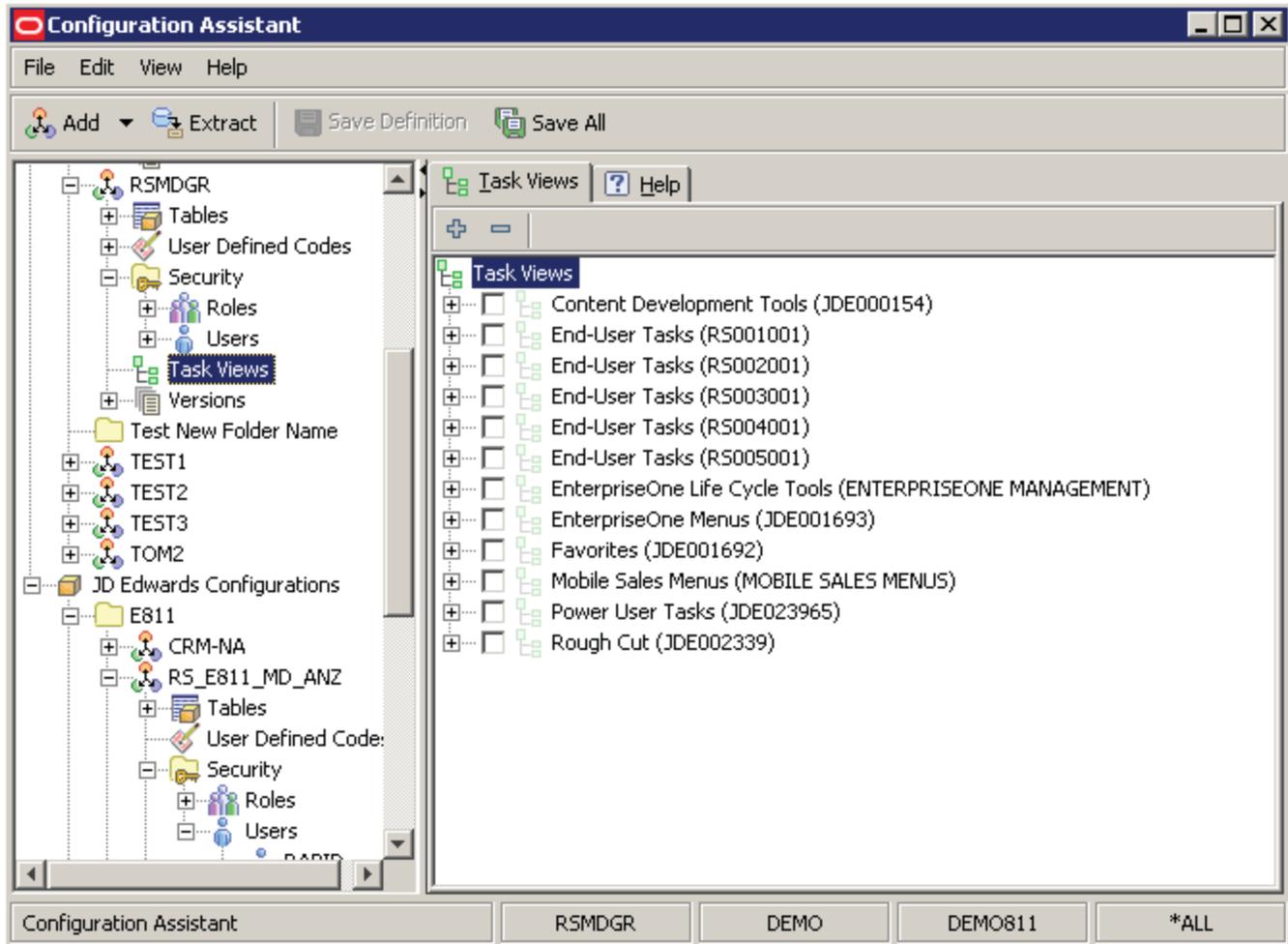
Note: For any selected records, the non-changeable default load action is to replace records.

Tip: For searches, you can use the drop-down list to select from predefined values for the Region and Industry fields. See *Configuration Properties - Advanced Tab* for a description of the UDC values that are used by Configuration Assistant to complete the fields selected from the drop-down list.

10 Task Views

Task Views

When you select the Task Views tab, the system displays a grid showing all currently defined task views for the selected node:



Note: The selection of task views is only from the highest level within JD Edwards EnterpriseOne. You cannot select only specific sections within a task view. You must either select the entire task view or not.

With the Task Views node selected, the Task Views tab presents a list of the Task View categories. If you expand a Task View category, Configuration Assistant retrieves and populates the display with all task views associated with the category. During the retrieval, Configuration Assistant displays a status indicating the progress of the record retrieval.

Note: For any selected objects, the non-changeable default load action is to replace objects.

CAUTION: This can be a time-consuming process, depending on the number of records that are retrieved. You cannot cancel the record load after you have initiated it. However, you can continue to use other functionalities of Configuration Assistant while the load is in progress.

Note: These topics in the Productivity Hints:

- *Adding or Removing Items to Your Configuration*
- *Edit Functions in Specific Nodes*
- *Folder Structure in the Configuration Assistant*
- *Icons Used by Configuration Assistant*
- *Multiple Selects and Deselects*
- *Panes in the Configuration Assistant*
- *Search Drop-Down List - Selecting All*
- *Search Results*
- *Search Strings - Valid Delimiters*
- *Search Strings - Wild Cards*
- *Sorting Within Columns in a Grid*
- *Status Bar*

11 Versions

Overview

When you click the Versions node, in the right panel you can select from these tabs:

- *Search*
- *All Versions*

Note: These topics in the Productivity Hints:

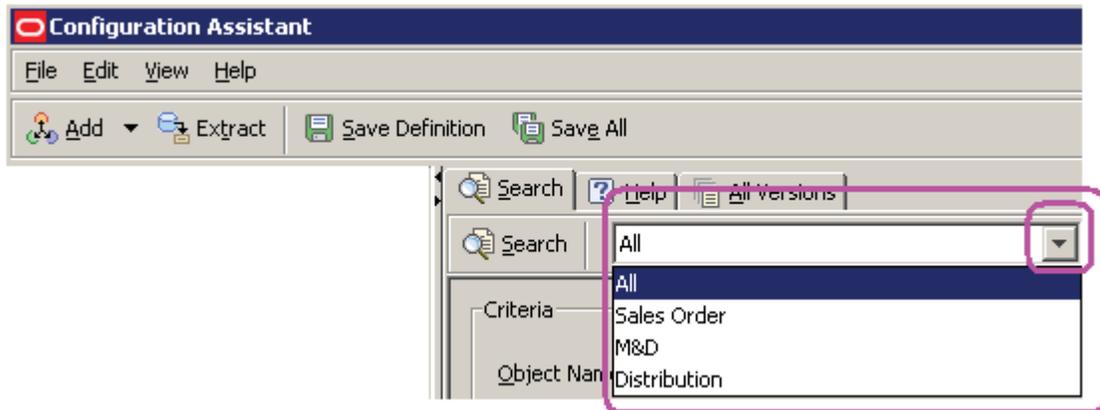
- *Adding or Removing Items to Your Configuration*
- *Edit Functions in Specific Nodes*
- *Folder Structure in the Configuration Assistant*
- *Icons Used by Configuration Assistant*
- *Multiple Selects and Deselects*
- *Panes in the Configuration Assistant*
- *Search Drop-Down List - Selecting All*
- *Search Results*
- *Search Strings - Valid Delimiters*
- *Search Strings - Wild Cards*
- *Sorting Within Columns in a Grid*
- *Status Bar*

Search

With the User Defined Codes node selected, the Search tab provides these functions:

- Search button

- Drop-down list from predefined searches by industry or other category (for example, Rapid Start)



Note: If you select All from the Search drop-down list, the Configuration Assistant pulls in all items that are defined for the selected node. These items do not include transactional data.

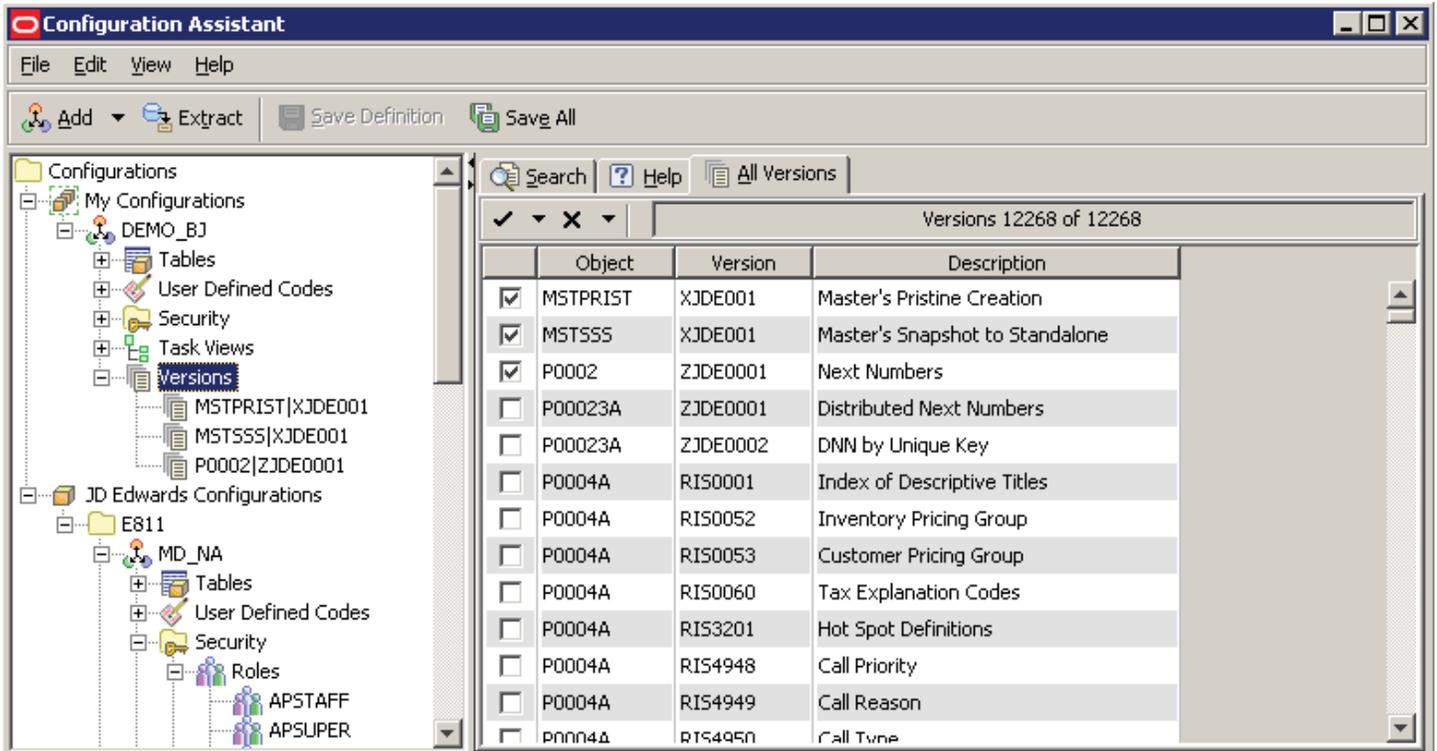
- Search Criteria fields:
 - Code Type
 - Product Code
 - Type Description
 - Value
 - Value Description 01
 - Value Description 02

Note: For any selected objects, the non-changeable default load action is to replace objects.

All Versions

When you select the All Versions tab in the right panel, the Configuration Assistant displays a list of all JD Edwards EnterpriseOne Versions in the Version datasource for the environment you are logged in to.

The grid contains a variety of information about each version, including object, version, and description.



Note: When you select All Versions, the Configuration Assistant displays all default JD Edwards EnterpriseOne versions (such as those that are prefixed with XJDE and ZJDE) as well as versions associated with Rapid Start (those that are prefixed with RIS).

