This segment from our JD Edwards Enterprise One Common Foundation/User Interface 9.2 manual is being made available as a sample of our training manuals. Please contact Sales@JDEtips.com if you have any JDE training needs, or visit www.JDEtips.com for more information.

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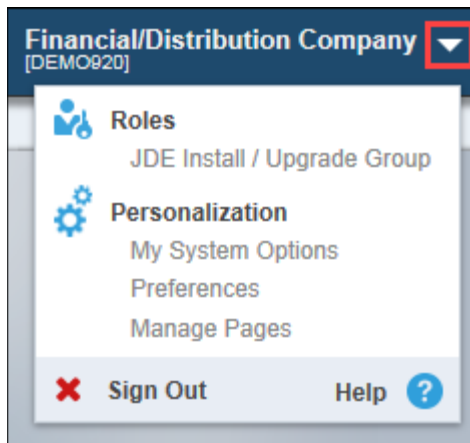
EnterpriseOne Menu Bar

The top Menu Bar contains several useful tools – let's walk through each one.

Roles and Personalization

The Roles and Personalization panel contains several helpful options. Let's look at each one in turn.

♦ Click on the right-side dropdown first.

Environment – The environment you're logged into, such as Production or Test, displays in brackets in the top Menu Bar.

Roles – In this environment, the Demo User Role is the only option. If you wear multiple hats in your organization, you may have the option of selecting between multiple Roles. Your Role determines the menu options you'll see along with other security settings.

Personalization – Contains My System Options, My System Profile, Preferences:
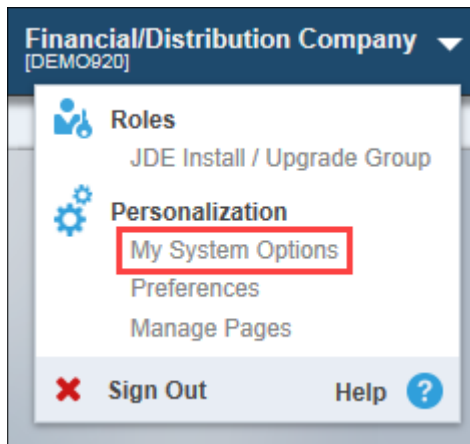
◆ **My System Options** – Open My System Options. Here you can update User Profiles, Change Passwords, view Submitted Reports, or change your Default Printer.
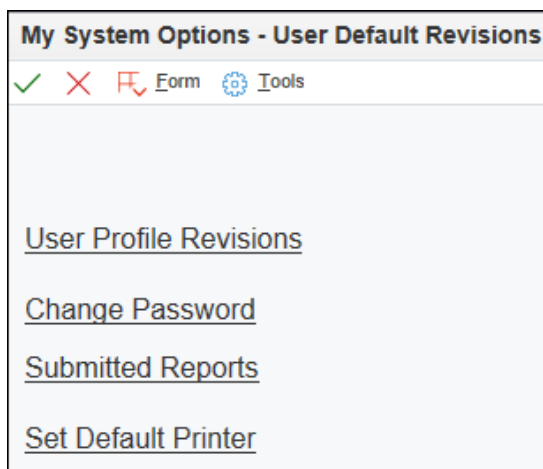

My System Profile – Click on **My System Profile**. There's nothing to change here. This option provides information about the environment, your user profile, and your assigned user role.


◆ **Preferences** – Click on **Preferences**. There are a number of options available that allow you to adjust what the system displays and how it functions for your User ID. We'll just touch on these for now and refer back to them later as we cover related topics.
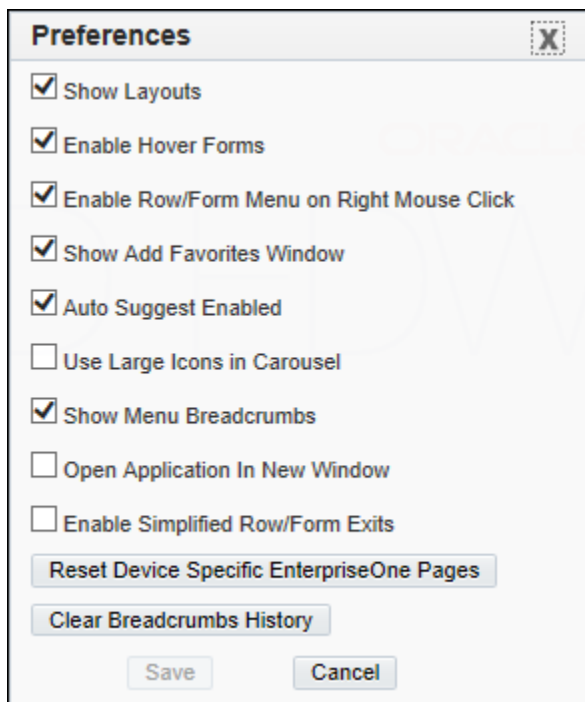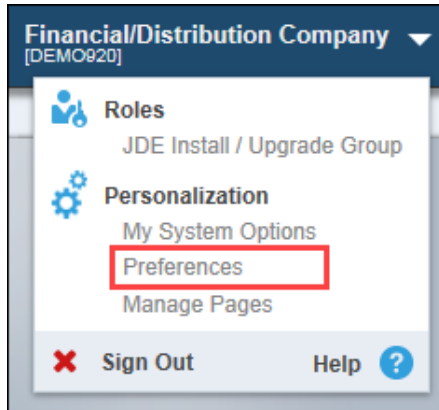
- **Show Layouts** – When this feature is enabled, you'll be able to view what's called Composite Application Framework (**Café One**) layouts. This is a way to view multiple related content such as applications, third-party content, or URLs layered onto one page.
- **Enable Hover Forms** – This feature allows you to hover over a field and view a pop-up window with related information.
- **Enable Row/Form Menu on Right Mouse Click** – If this option is enabled, you can either:
  - Use the Right Mouse Button while selecting one or more grid rows to access a **Row Exit Menu** OR:
  - Use the Right Mouse Button while in the header area of a form to access the Form Exit Menu.
- **Show Add Favorites Window** – You can enable/disable the display of a pop-up window allowing you to rename your Favorite before adding it.
- **Auto-Suggest Enabled** – You can enable or disable a feature which speeds up locating a record such as an address.

- **Use Large Icons in Carousel** – With this option, you can choose to display either large or small tiles in the Carousel, which is an alternate navigation tool.
  - While you're here, make sure **Use Large Icons in Carousel** is turned on.
- **Show Menu Breadcrumbs** – Enabling this option displays the navigation pathway when accessing an application.
- **Open Application in New Window** – If this is turned on, each time you open a new application it will open in a new browser window.
- **Enable Simplified Row/Form Exits** – This is an alternate right sidebar layout for viewing Row and Form Exits.
- **Reset Device Specific EnterpriseOne Pages** – If clicked while signed into EnterpriseOne on the iPad or other device, the E1 Pages will reset to those from the main Web Client Environment.
- **Clear Breadcrumbs History** – It's possible to view and pull up prior breadcrumb navigation paths and this option clears historical paths.

Manage Content – Tools for creating the E1 Pages tabs. The original tool creates what's called **EnterpriseOne (E1) Pages** or **Classic Pages**. The newer point-and-click, user-friendly approach creates **Composed Pages,** which lets you create a page with layers of content, including Classic E1 Pages, One View Reports and Watchlists, URLs, and applications.
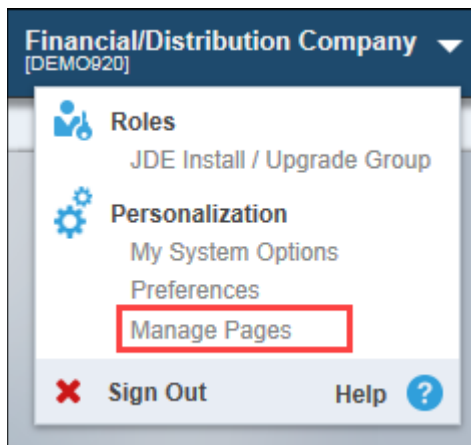
Sign Out – Click here to sign out of the Web Client.
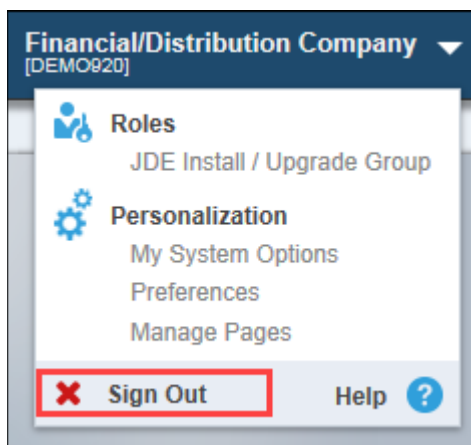
⚠ Always click the **Sign Out** link to close your Web Client. Do not use the red X in the upper right-hand corner to sign out! This will leave your session open and you may not be able to sign back in for several minutes.

✎ Occasionally, you simply time out of the session. In this case, the server is still running and you just need to establish a new session.

Help – Depending on a company's EnterpriseOne environment, you may be able to access web-based help. The most common use for this option is to provide online access to EnterpriseOne Applications User Guides.

Now let's walk through the options on the left side.

Home

You can click **Home** from anywhere in the system and always return to your initial sign-on screen, also known as your "Home" screen.

Navigator

This option lets you access to many different parts of EnterpriseOne. We will look at each in turn.

Content Development Tools
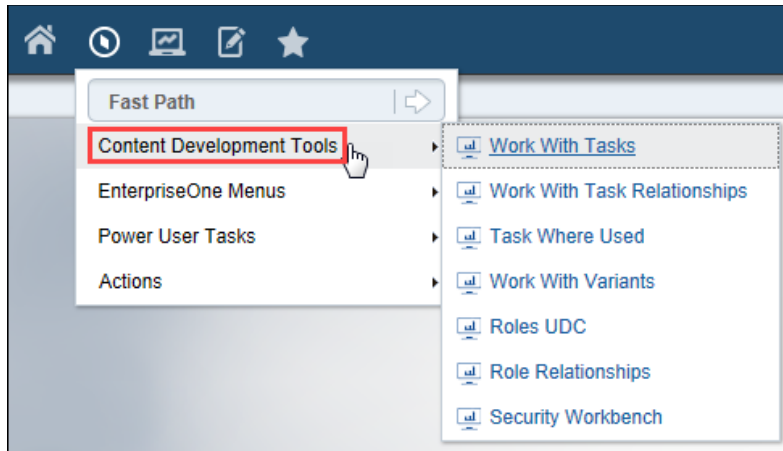
This option is a set of tools used to define how you can access the system. These options are typically used by your organization's EnterpriseOne System Administrator.
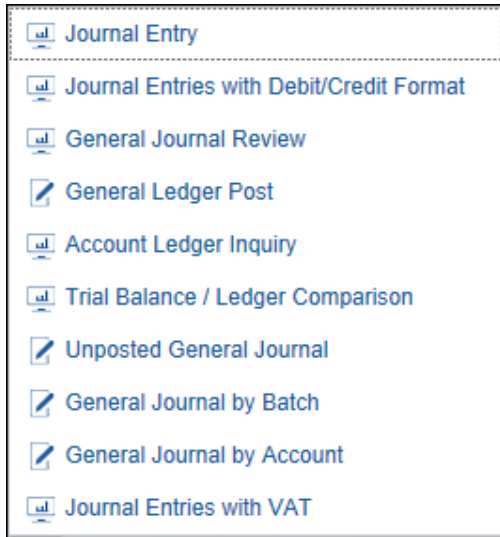

EnterpriseOne Menus

From this option, you can access virtually any system within EnterpriseOne. As you can see, it has a hierarchical structure, meaning that each successive selection determines which options are available at the next (lower) level.

♦　Follow the highlighted options on the screen shot below and see how each selection brings you to a lower level of detail in that particular system:

♦　**Financials → General Accounting → Daily Processing →Journal Entries, Reports & Inquiries**
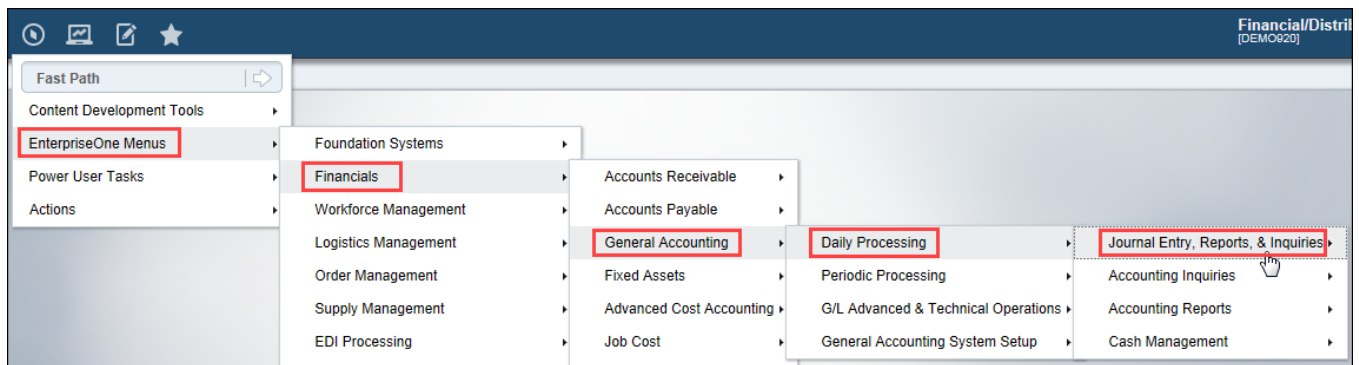
Notice that the **Navigator** ▸ icon identifies a menu or sub-menu that takes you to the next lower level list of options.

On the final menu, do you notice the different shapes to the left of each option? They help you identify what type of program you're looking at:
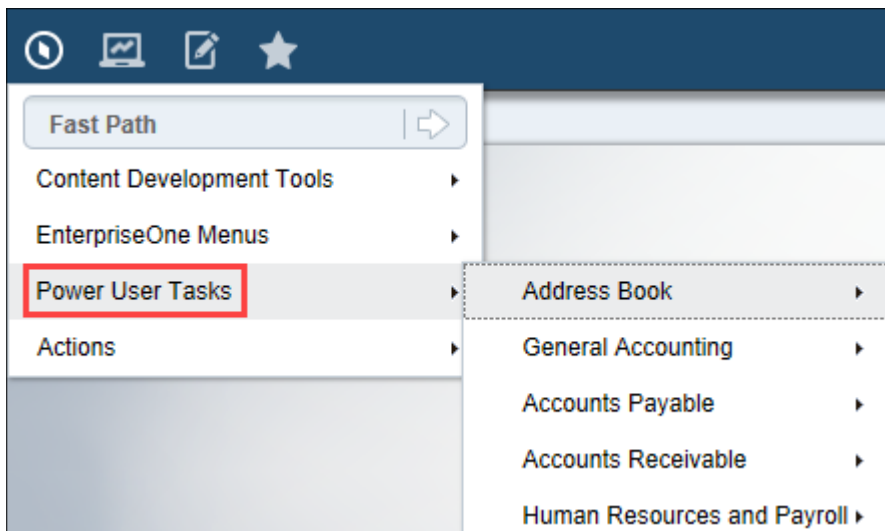
   identifies an online (interactive) program

   identifies a batch program

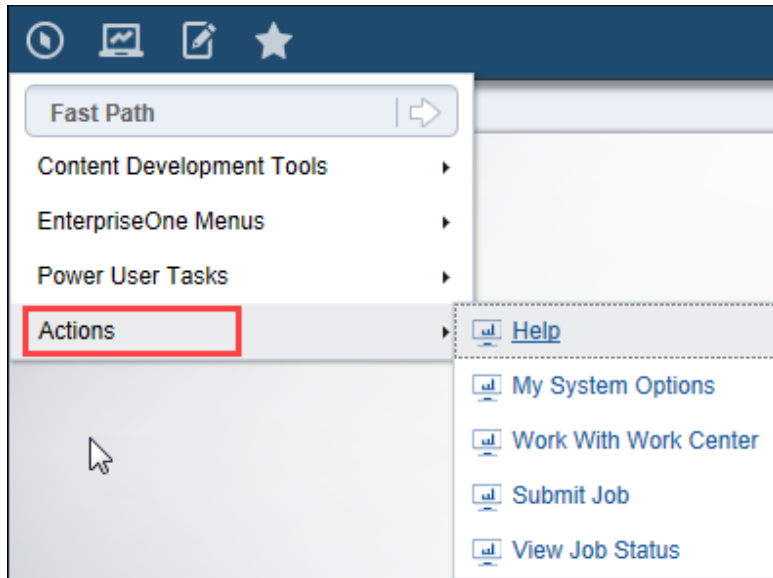> ✏️ The common "EnterpriseOne" speak for batch program is UBE, which stands for Universal Batch Engine.

Power User Tasks

Power User Tasks point to advanced and system setup options.

Actions

These are tools geared to support the individual user:

Failure Recovery Data – lets you review data from failed transactions.

Help – This option is actually the same as the **Help** option in the Menu Bar that we saw earlier. Again, the most common use for the **Help** option is to provide easy access to the User Guides for EnterpriseOne applications.

My System Options – From here, you can change your User Profile, change your Password, view Submitted Reports, or set your Default Printer.

My System Profile – Displays tools release, login name, environment and role.

Work with Work Center – You can view workflow messages, UBE error reports, and messages specific to your work function.

Submit Job – You can use this as one option to submit UBEs for execution either on the Enterprise Server or from your local desktop.

View Job Status – From here, you can view the status of UBEs that you have submitted.

Open Applications

You can click the **Open Applications** option to view the applications currently running on your desktop. To toggle between them, just click on an application in the list.

✏️   Your System Administrator determines how many applications can be opened at once.
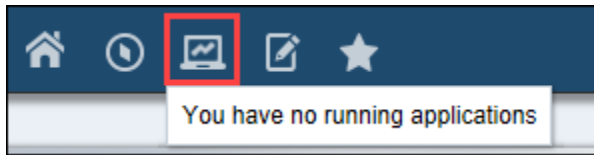
✎ **JDE Rule to Live By:** *Keep the number of active (open) applications as few as possible.* Having multiple applications open at the same time may cause record locks and performance issues.

Recent Reports

The Recent Reports Option displays your last twenty reports. The **View Job Status** option displays your full list of reports (more on this later when we create reports).
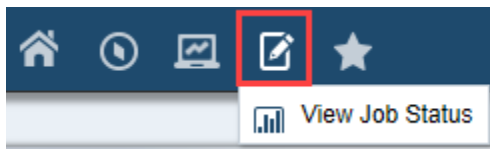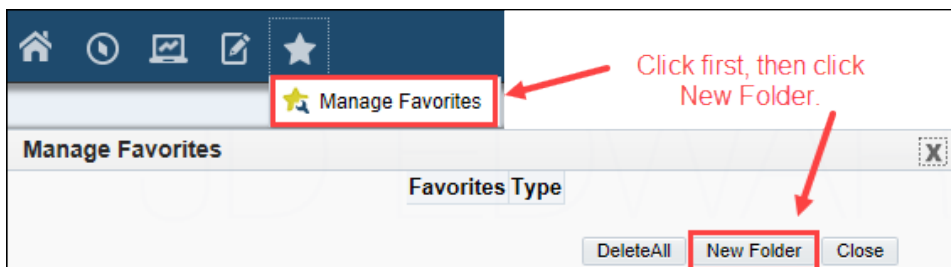

Favorites

You can create your own list of favorites to quickly access frequently used applications or reports. This may, in fact, become your main navigation tool.

♦ Select the Favorites drop-down menu.
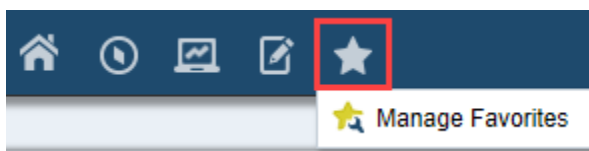
♦ You will see a drop-down that allows you to manage your favorites. Select **Manage Favorites** and then click **New Folder**.

You might want a description that is a bit more informative than "New Folder 1".

Click the **text box** for the newly-created favorite, type **Class Favorites** as the new folder name and <u>tab away from the field</u> to save the update.
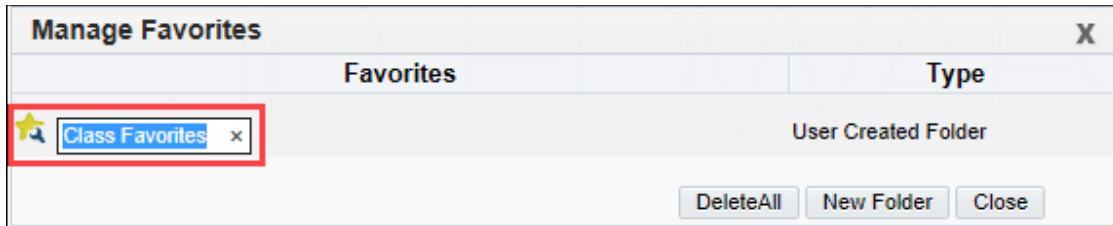

♦ Click **Close** then click on the **Favorites** dropdown. You will see the new folder under the Favorites section.
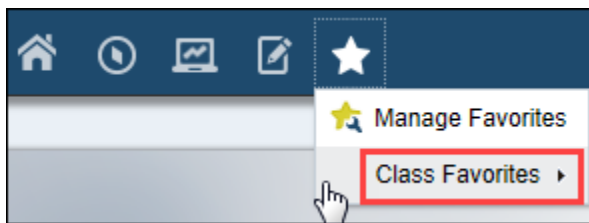
You can add one or more applications to the Favorites folder that you just created. Let's add one together:

♦ In succession, click on **Navigator → EnterpriseOne Menus →, Foundation Systems → Address Book → Daily Processing.**

♦ After you click **Daily Processing**, hover over **Address Book Revisions** and do a right-click, then click **Add to Favorites**.
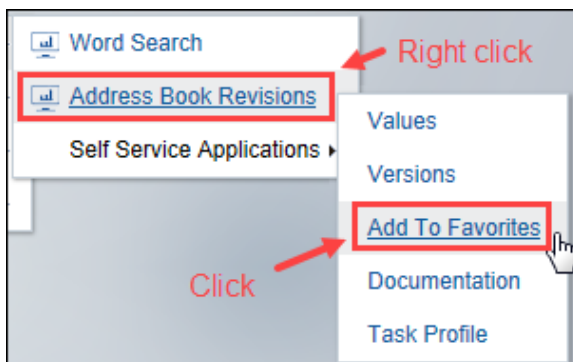
Click **Create Favorite** when prompted to do so.
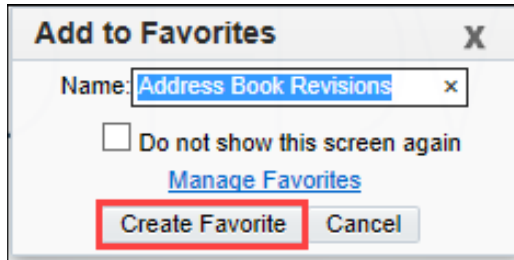
The application that you selected will be added to the Favorites List.
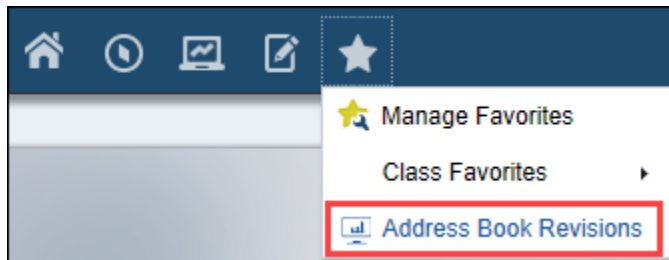
If you don't like where that **Address Book Revisions** favorite landed, you can move it – either into a custom folder, as we'll do next, or to a different position in the **Manage Favorites** window.

- ♦ Click **Manage Favorites**. When Favorites are displayed, click and hold until the move arrow displays, then drag the application into the folder.
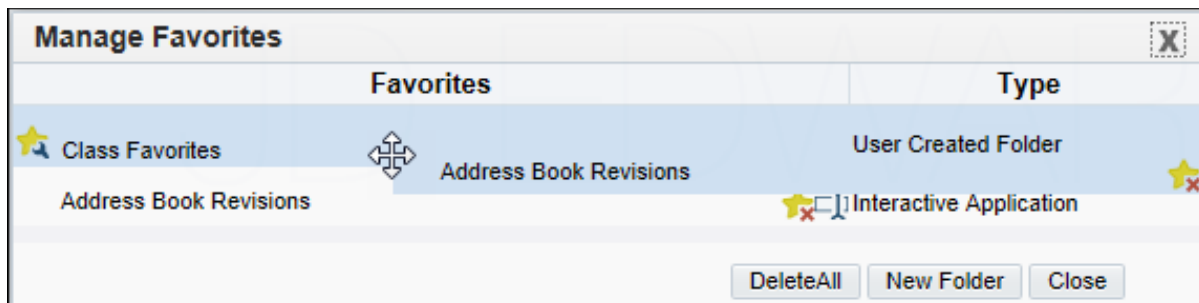
Close the Manage Favorites box then look at your Favorites from the main menu again. The transplanted favorite will take up residence in the folder that you specified!
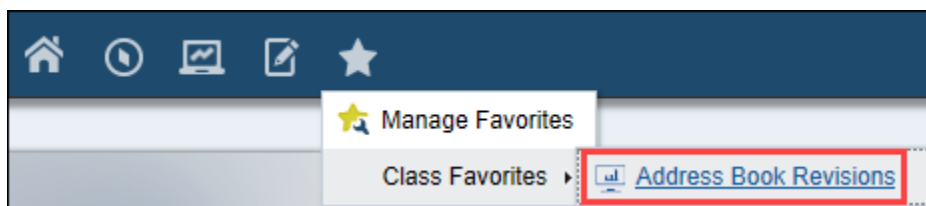
How about a little more practice? Using the above method, add the following programs to your favorites list.

♦ **Customer Ledger Inquiry** (EnterpriseOne Menus → Financials → Accounts Receivable → Daily Processing → Customer Invoice Entry)

♦ **Enter Orders Header** (EnterpriseOne Menus → Order Management → Sales Order Management → Daily Sales Order Management Processing → Sales Order Processing)

♦ **Supplier Ledger Inquiry** (EnterpriseOne Menus → Financials → Accounts Payable → Daily Processing → Supplier & Voucher Entry)

♦ **Job Cost Master Revisions** (EnterpriseOne Menus → Project Management → Job Cost → Daily Processing → Job & Budget Setup)

♦ After you've added the favorites, reopen **Manage Favorites** and drag them to the Class Favorites folder as you did with **Address Book Revisions.**

♦ Close out of the **Manage Favorites** window.

Do you have a favorite that "isn't" anymore? Let's say you want to remove the **Supplier Ledger Inquiry** favorite that you just added.

♦ To get rid of a favorite, click on the **Favorites** dropdown, hover over your favorite and do a right-click. Click **Remove From Favorites**.
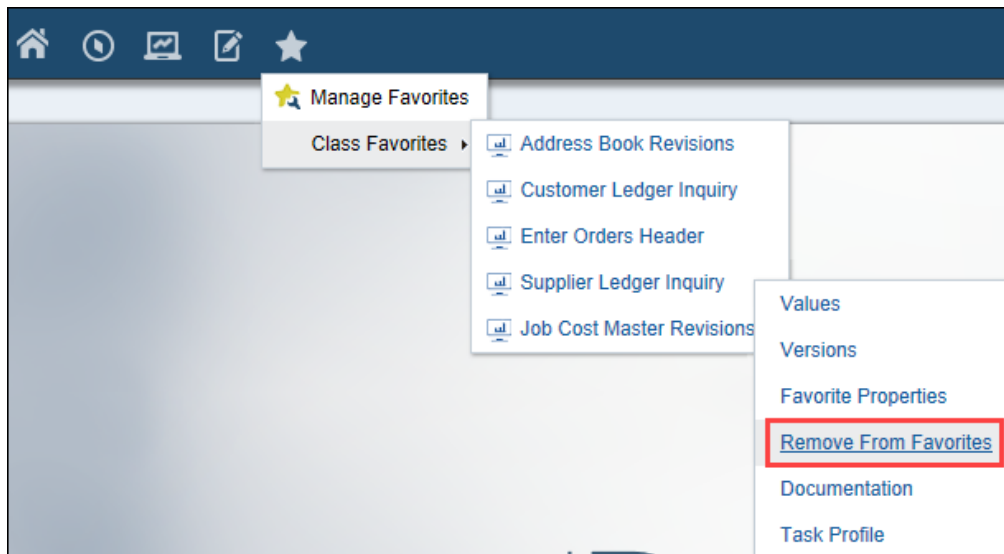
You will be prompted to confirm the deletion.
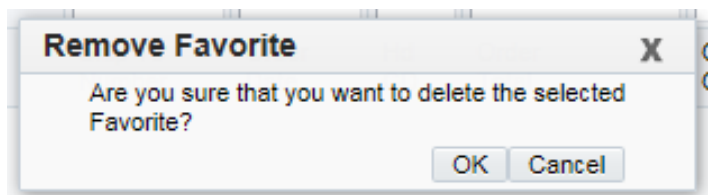
♦ Click **OK**.

Here's another way to delete Favorites – let's delete **Job Cost Master Revisions** this time:

♦ Open the **Manage Favorites** window.

♦ Click on the **User Created Folder** icon next to Class Favorites to open another window and then click on **Job Cost Master Revisions.**

♦ You will see the **Delete** , **Rename** , and **Move** (as in **Move** the favorite back to the **Manage Favorites** window) icons. Click on the **Delete** icon to delete your new Favorite.

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