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February 2013

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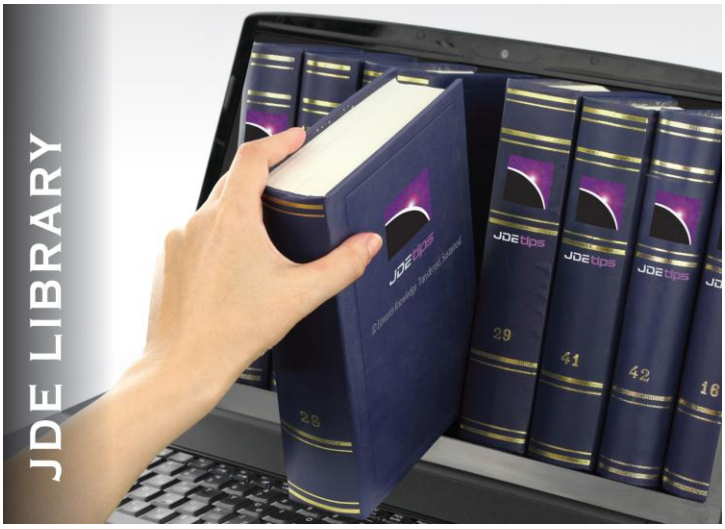

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Address Book

E1 W **Postal Code Validation: As Easy as 1, 2, 3, ZIP!, by Steve Kriegel.** "Return to Sender—Address Unknown" can be a frustrating experience for any accounts payable or marketing department relying on postal service deliveries for customer invoices and other communications. Many times, it's a matter of an incorrect postal code. If this has become a frustrating endeavor for you and your staff, then this tip from Steve Kriegel might be just what you need. In World®, there is a relatively unknown feature in the Address Book Maintenance program that can validate postal codes, as well as save valuable time in data entry. Steve steps us through how to trigger this feature in World. If you're a OneWorld® (EnterpriseOne®) customer on Xe®, you're in luck as well; Steve has information you can use to initiate this functionality in your system.

W **"Google" Search your JDE A7.3 Address Book, by Eric Lehti.** If you enjoy the simplicity of Internet search engines such as Google™ and you wish you could have something similar for JD Edwards World® Address searches—we've got some great news! There is functionality already available in your system, using Program P01200 and the F16 key,that will allow you to "google" your JDE Address book searches, thus getting you the names you want quickly. Eric Lehti takes us through the steps and menus you'll need to increase your search capabilities. Even more, he provides some pointers for how to avoid a lengthy result listing, and how to "spider" your Address book.

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Advanced Planning

E1 **Sales & Operations Planning and the Role of APS, by Ken Spigarelli, MetaChain, Inc.** In previous articles Ken has provided an overview of the Advanced Planning Solution (APS), its integration schema, and its relationship to EnterpriseOne® ERP. He moves now to a business process oriented topic within the planning environment, Sales & Operations Planning (S&OP). Having an S&OP process is considered best practice. It has rapidly become a focal point for many organizations. This white paper provides an introduction to S&OP and provides an overview of the role the EnterpriseOne Advanced Planning (APS) suite can play within this process.

E1 W **PeopleSoft Enterprise Resource Planning (ERP) and Advanced Planning Solution (APS) Integration – An Overview, by Ken Spigarelli and Stephen Checker, MetaChain, Inc.** Previous articles from MetaChain have whetted your appetite by explaining the basics of APS and how it differs from the typical ERP solution. You know that these systems have to be integrated, and you've been wondering what the integration points are. You wonder, JDEtips answers. Read this for an excellent explanation of how your EnterpriseOne or World solution works with the Advanced Planning Solution.

E1 W **Building an Advanced Planning (APS) Business Case, by Ken Spigarelli, MetaChain, Inc.** Ken Spigarelli gives us a break from the technology aspects of applications and takes us on a journey on which many of us fear to embark. The dreaded “how do I decide if this is the right thing to do” appears less intimidating when you have such a clear road map as the one Ken has drawn for us. The process described here is geared toward the JD Edwards Advanced Planning products, but we see no reason you could not apply these methods to building any IT business case.

E1 W **Overview of APS, by Ken Spigarelli, MetaChain.** This overview is an excellent start to a series of articles on JDE's Advanced Planning Solution brought to JDEtips readers by MetaChain. Start here if you want to understand the potential of this sophisticated set of modules. As Ken writes, "APS systems are used by companies to gain a competitive advantage and to improve their bottom line through better customer service and lower inventory levels. These powerful applications are used to synchronize and optimize supply chain networks." MetaChain is the official JDEtips partner for Advanced Planning Services.

E1 W **ERP vs. APS: A Conceptual Overview, by Ken Spigarelli and Stefan Achilles, MetaChain.** The first thing you might do to try to understand JDE's Advanced Planning Solution might be to connect it to something you understand already, like JDE's manufacturing suite. This article provides the reader with a general overview of some of the key functional differences between ERP and Advanced Planning systems, as well as insight into some frequently asked questions about the comparisons between the systems. You may be among the many clients wondering which functions belong in MRP/Forecasting and which belong in APS. Also, where does the data reside? Interfaces? Ken and Stefan answer these basic questions and much more in this article.

E1 W **Advanced Planning - Comparison of Forecasting in JDE's ERP vs. Forecasting in APS, by Matthias Bolsinger and Ken Spigarelli, MetaChain.** The Advanced Planning experts at MetaChain continue our series of articles designed to get JDE clients familiar with APS functionality. This article is destined to be a classic—it addresses the question of where to do your Forecasting—in the ERP system or in APS. Read this to find out which Forecasting tool is the right one for your business.

E1 W **Reducing Inventory With APS, by Robert Byrne, Terra Technology.** Reducing inventory is one of the touchstone goals of any Advanced Planning Implementation. Learn how the APS suite accomplishes this goal.

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E1 W **Generating a Multi-Stqage Master Production Schedule, by Robert Byrne, Terra Technology.** This white paper addresses generating a multi-stage, constrained, and optimized production schedule in Advanced Planning. PSD, PSP, PDP and SNO are all capable handling multi-stage manufacturing representations, but there are critical differences in each module. The surprisingly best fit? Well, you'll have to read the article to find out!

E1 W **Advanced Planning Issue of JDEtips, by Klee Associates.** An excellent introduction to JDE's Advanced Planning Solution (APS). A solid overview and several advanced tips are included.

E1 W **Four Tips on Advanced Planning, by S&T - Servicio y Tecnologia.** Features tips on using Emulators in Production Scheduling, Cost Traceability, cost of activities in Production Scheduling, and using multiple nodes in a Supply Chain Network. Written by a JD Edwards business partner based in Argentina.

E1 W **Customer & Supplier Collaboration Case Study, by Terra Technology.** A good overview of where Advanced Planning fits into the Supply Chain functionality that JDE already offers. Based on a case study from one of Terra Technology's clients.

E1 W **Demand Consensus - Intro to Consensus Based Forecasting, JD Edwards.** Demand Consensus is a JDE Advanced Planning application that takes generated forecasts from multiple sources and provides a collaboration forum for creating a single forecast.

E1 W **Advanced Order Promising, JD Edwards.** A good review of the features included with the Order Promising module. We've seen a demo of this product and it is very cool--it analyzes various order fulfillment scenarios and tells users which is the most profitable manner to fulfill the order.

E1 W **Demand Planning 3.0 - New Features and Functionalities, JD Edwards.** A solid overview of the Demand Planning module, along with a write-up of new features in Version 3.0.

E1 W **Order Promising 2.0 - New Features and Functionalities, JD Edwards.** Read up on the newest features of the Order Promising module.

E1 W **Strategic Network Optimization - Capital Asset Management, JD Edwards.** This White Paper explains how to use Advanced Planning to determine the optimal allocation of capital across the supply chain network.

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Bar Coding and Data Collection

E1 **Data Collection Solution Using EnterpriseOne Applications, by Heather Phillips** Isn't it great when you discover that you already have what you need to create a solution in JDE®? This tip is a perfect example of how standard EnterpriseOne® applications can be used to create an effective data collection solution that will work with any web-enabled handheld device. Heather Phillips discusses how she helped her company implement such a solution, including the development standards and deployment considerations needed. If you've been looking to implement or upgrade your data collection solution, and a third party solution isn't an option for you, this tip may provide just the alternative you need.

E1 W **Automated Data Collection (Webucation recording and PowerPoint), by Paul Hanson.** Add efficiency and transaction accuracy to manufacturing, warehousing, and distribution operations with Automated Data Collection--this Webucation session highlights the concepts and best practices.

E1 **Bar Coding Case Study – Lessons Learned, by Paul Hanson.** Does a project ever really end? If you're a faithful reader of JDEtips Journal, you know that the go-live is just the beginning. Paul Hanson's final installment in his series on bar-coding implementation takes us through each of his steps, with the obligatory "wouldas, couldas, shouldas" that come like an epiphany after everything is up and running. Think you're ready for your next project? Read on. . .

E1 **Bar Coding Case Study – Project Execution, by Paul Hanson.** Paul Hanson continues his series on implementing bar coding technology, this time taking a closer look at planning your project from start to finish. With, of course, his real life experience and the "gotchas" he picked up along the way!

E1 **Barcoding Case Study, by Paul Hanson.** You've heard all the hype. You've read the technical specs. You've learned all the buzz words. But have you heard from anyone who has actually implemented RFID and lived to tell the story? Our own Sr. Technical Editor, Paul Hanson, has been there and done that. If you've read Paul articles in the past, you already know that he believes in finding the most effective solution to any given challenge while keeping a sharp eye on the budget. This article is the first of his series that will relate his experiences in taking a company from a manual inventory movement system into an automated bar-coded system. Read on!

E1 W **Insights on Compliance for Consumer goods RFID Mandates, by Doug Liljegren.** With RFID technology looking more like it's "here today" than something to think about for the future, we feel there's just no such thing as too much information about it. In this article, Doug Liljegren provides an in-depth discussion of the technology, then clues us in as to where PeopleSoft's EnterpriseOne is gearing up to fit into the picture. This is a must-read if you don't want to be the broken link in the supply chain!

E1 W **Making Sense of RFID, by Pete Palazzolo.** After debuting in the 1940s, RFID has recently begun to establish itself as a major player in the future of data collection, identification and analysis systems because of its ability to create a dynamic link between people, objects and processes. Big time adoption of RFID technology is coming, as Wal-Mart has mandated that its top 100 vendors start using RFID tags in a test at 150 of its stores in Texas.

E1 W **Calculating ROI on Automated Data Collection, by Pete Palazzolo, ICI.** Identify areas where data collection delivers ROI and easily calculate the added financial and performance benefits your company can achieve by implementing Barcoding/Data Collection in your warehouse or shop floor.

E1 W **Introduction to Bar Coding and Data Collection, by Robert Rylander, Robert Rylander Associates.**
A detailed, two-part analysis by a 25 year veteran consultant. Read this if you are thinking of implementing Bar Coding or Data Collection. It gives you a great background on the technology, as well as practical project management advice.

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Collaborate 08

E1 **ERW II: More Report Writing Tips, by Penny Allen and Barb Osbourne.** Session # 35790 from Collaborate 08. See also Penny's article; *Beating the Business Function Blues* in the Reporting, Query, and Business Intelligence category.

E1 **ERW Tips, by Peter Rondinone and Tracie McGill.** Session #35880 from Collaborate 08.

E1 W **HCM Accrual and Rollover Tips by Debbie Boyd and Julie Russell.** Session #36180 from Collaborate 08.

E1 W **Sales Order and Advanced Pricing Tips, by Jane Perry and Bernie Augenstein.** Session #36110 from Collaborate 08. See also Jane's article, *Sales Order and Advanced Pricing Tips*, in the Distribution/Advanced Pricing and Sales Order Management categories.

E1 **Tips on A-R & A-P Netting in EnterpriseOne, by Bob DeMartino and Jolynne Whitney.** Session # 35800 from Collaborate 08.

W **PC Import-Export World A9.1 Tips, by Kathy Adams.** Session # 36180 from Collaborate 08. See also Kathy's white paper, *Interactive and Batch Data Import and Export in World A9.1* in the Technical/World Software category.

E1 W **Multi Currency Tips, by Ravi Adhi and Lina Hadi.** Session #36100 from Collaborate 08.

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Content Manager

E1 W **Content Manager, JD Edwards.** Learn the benefits of JDE's Enterprise Content Management System. Learn how to use this tool to build a central repository for all documentation, procedures, translations, and even tips from JDEtips.

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Cross Functional

E1 **Enforcing Hierarchical Category Codes, by Mike Wright.** From DeMartino to Klee to Wright—no, this isn't the next famous double play combination, but it does describe how this tip came to be. Andy Klee, our publisher, was looking for some "hidden gems" to share with JDE audiences, and called Bob DeMartino, one of our ace JDE® Financials consultants a few months ago. Bob mentioned Hierarchical Category Codes, and even though it could only be enforced via post-setup reporting, Andy took it and ran with it. All the way to Mike's inbox, and Mike (our favorite EnterpriseOne® developer), agreed to write up the concept and even developed the source code for enforcing the concept during setup.

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Customer Relationship Management (CRM)

E1 W **From Lead to Sale (Part I of III), by Jeff Blankenship, Brij.** Jeff is one of the few consultants in the world who has implemented JDE's new Customer Relationship Management (CRM) offering. If you've ever wanted to see what it looks like, up close and personal, here's your opportunity! This is the first article in a series of articles describing how to use the JD Edwards CRM product to generate Sales Orders from Leads. Jeff gives some excellent time-saving tips along with a detailed overview, complete with over a dozen screen shots. Reading this article is guaranteed to whet your appetite for the next two installments.

E1 W **From Lead to Sale (Part II of III), by Jeff Blankenship, Brij.** Jeff continues his leading edge series on JDE's CRM suite with the second in a three-part series. Here, Jeff covers converting leads into accounts and generating opportunities. One of the great things about this series is that you can get a feel for the CRM applications before you decide to implement them. And by the way, this series of articles applies equally to both OneWorld and World Software Environments.

E1 **EnterpriseOne Customer Service Management System – The Stealth Module, by Scott Hollowell, Asset Management Solutions.** Scott does a great job explaining exactly what the CSMS module does, explaining the basics, and positioning the available functionality to our readers. CSMS probably touches more core areas of the software than any other module in the system. It is not just a coincidence that Scott is also our Enterprise Asset Management Expert

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Disaster Recovery and Data Archiving

E1 W **Archiving JD Edwards Data, by Susan Ferlita**. Is a successful data archiving project in EnterpriseOne really all that elusive? It can be done—but requires a great deal of planning and attention to detail. In this article, Susan Ferlita defines the process her organization followed to implement an archiving strategy, including some strategy tips for long term maintenance.

E1 W **Backup Considerations for Your JDE System i Data, by Jeff Babcock.** Lost data. Just say the phrase and thoughts of hours, days, even years of invaluable work just vanishing are conjured up. It's enough to want to scream: GET ME SOME BACKUP! Fortunately, there is a multitude of options out there, all at varying costs and prices. But Jeff Babcock has a few tricks up his sleeve that will help you keep data safe and secure by just using what you already have available in your current system—and all it costs is a little time and space—disk space that is!

E1 **Archiving Eases JD Edwards EnterpriseOne Upgrades, By Bryan Vogus.** Can EnterpriseOne upgrades be painful? Does having a tooth pulled hurt? There are ways to ease the pain of an upgrade (we can't help you with the tooth); one of those ways is through implementing a data archiving solution. Princeton Softech is JDEtips' newest Software Solutions partners, specializing in data archiving software for JD Edwards® EnterpriseOne systems. Princeton Softech manager Bryan Vogus joins us to provide some food for thought on how a data archiving can help streamline your upgrade process, including some tips on what to look for when selecting a data archiving solution, plus the benefits of archiving before or parallel to your upgrade.

E1 W **Disaster Recovery Planning – A Case Study, by Gregg Larkin.** Think "disaster" and you envision images of something horrific and destructive; Mother Nature (or even mankind) at their worst. But sometimes, it doesn't take an act of God to take down a system and stop business cold. Smaller leaks can sink the system ship just as quickly. And, while it may be cost prohibitive to prepare for a catastrophic, yet unlikely, event, it does make prudent sense to have a Disaster Recovery Plan(DRP) in place for more probable events—from hardware failure to power outage. If you haven't devised a plan yet (or you're not sure how fail safe yours is), Gregg Larkin shares a high-level view of an actual DRP design and the testing that goes with it.

E1 W **Business Continuity: Disaster Recovery Planning, by Hartley Farmer, Westbrook Systems, Mike Wright, Werner Co.** This article is presented jointly by Hartley Farmer and Mike Wright. Hartley addresses the various aspects of recovering data, while Mike offers the CNC perspective of programs and system objects. We begin with laying out a plan to protect your data, then move along with points to ponder regarding your system. You'll find that this White Paper gives you some excellent pointers to help you make key decisions in this critical area.

E1 W **Purging and Housekeeping Strategies, by Hartley Farmer, Westbrook Systems.** Take advantage of Hartley's 20 years implementing JD Edwards. Are your users complaining how long batch jobs or inquiries take to run or the IT/CNC staff complaining how long back-ups take or how long it takes to copy one environment to another? The central issue is the poor data housekeeping at most sites and hence uncontrolled growth in data files. Hartley presents reality-based advice on how to get control of your data.

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Distribution

E1 W **Hidden Gems in JDE Financials and Distribution, by Cheryl Pierce and Andy Klee. (Webucation Event Recording)**. An in-depth review of JDE's financial integrity jobs, advanced tips in Procurement, Sales Order and Pricing, including "Hierarchical Category Codes".

E1 **Enforcing Hierarchical Category Codes**, b**y Mike Wright.** From DeMartino to Klee to Wright—no, this isn't the next famous double play combination, but it does describe how this tip came to be. Andy Klee, our publisher, was looking for some "hidden gems" to share with JDE audiences, and called Bob DeMartino, one of our ace JDE® Financials consultants a few months ago. Bob mentioned Hierarchical Category Codes, and even though it could only be enforced via post-setup reporting, Andy took it and ran with it. All the way to Mike's inbox, and Mike (our favorite EnterpriseOne® developer), agreed to write up the concept and even developed the source code for enforcing the concept during setup.

E1 **Sales Order Quick Reference Cards, by Ted Aseltine.** This handy two-page reference is designed to be printed on both sides of a page so you can slip in under your keyboard and have it handy as a reminder. Feel free to have it laminated. Is this everything you ever wanted to know about Sales Order processing? Nope. But it has a great process flow chart, key file names, some great tips, and a summary of enhancements since E1 8.9.

E1 **Advanced Pricing Quick Reference Cards, by Ted Aseltine.** This handy two-page reference is designed to be printed on both sides of a page so you can slip in under your keyboard and have it handy as a reminder. Feel free to have it laminated. Is this everything you ever wanted to know about Advanced Pricing processing? Nope. But it has a great process flow chart, key file names, some great tips, and a summary of enhancements since E1 8.9.

E1 W **The Junk Drawer – Some of my favorite tips on Distribution**, **by Russ Bartunek.** One of the beauties of JDEtips is that there is finally a place to publish and organize all those great ideas consultants and clients have gathered during their JD Edwards careers. Russ's article is a microcosm of JDEtips—great ideas written down, finally finding a home where they can be shared with everyone else.

E1 W **Project Accelerator AAIs - Getting AAIs off the Critical Path, by Emerson Snider, Butterfly Software.** Even experienced Distribution consultants should read this tip. Learn how to save time by being able to setup AAIs, even before the Chart of Accounts is finalized. Common-sense advice from a Master consultant!

E1 W **Changing GL Classes, by Pat Martino, Focus Systems.** Eliminate the risk for handling this tricky change to your setup, post go-live. Be aware of all the implications of changing the G/L class on an item. This article applies to both OneWorld and WorldSoftware.

E1 W **Challenges at the Point of Sale-An Overview of POS Approaches, by Robert Fish, Responsive Data Systems.** Trying to figure out what your options are in POS approaches? Which is better, a centralized or decentralized approach? How is the back office data (customers, pricing, items, availability) accessed by the POS system. Answers from the experts at Responsive Data Systems, authors of Competitive Edge POS software for the IBM AS/400.

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Distribution – Advanced Pricing

E1 W **How to Reduce the Number of Adjustments on an Adjustment Schedule, by Emerson Snider.** It started with a single adjustment schedule. Then the adjustments kept coming and coming---it had to do with pricing; "yep, there's an adjustment for that." Before you knew it, order entry time increased, processing time dragged on, and your business wasn't too happy. Time to get the smiles back. This article by Emerson Snider shows you how to reduce the number of adjustments on an adjustment schedule in eight simple steps.

E1 **Step by Step: What the Pricing Engine Actually Does, by Darren Ricciardi**. If you're using Advanced Pricing, it's time to get better acquainted with the Pricing Engine. Knowledge of the Pricing Engine will not only help you realize the full potential of your Advanced Pricing module, but also help you to diagnose issues that may arise during module setup. Let this article serve as your guide to gain more knowledge on the core of Advanced Pricing.

E1 W **Advanced Pricing, by Tim Scott and Andy Klee. (Webucation Event Recording)** Advanced Pricing can be a bear. Even if you know what you are doing. When you get the wrong price on an order, it isn't always easy to figure out why. Join Tim Scott and Andy Klee as they explain how to troubleshoot your Advanced Pricing setup. Then we'll cover some of our favorite Advanced Pricing tips, including our favorite Rules of the Road—designed to keep you out of trouble. Tim and Andy have over 25 years of Advanced Pricing experience between them—so take advantage of their expertise.

Bonus Document: Attendees will get a copy of our new "Step by Step: What the Pricing Server Actually Does"—this should be a big help in troubleshooting your setup.

E1 **Advanced Pricing Quick Reference Cards, by Ted Aseltine**. This handy two-page reference is designed to be printed on both sides of a page so you can slip in under your keyboard and have it handy as a reminder. Feel free to have it laminated. Is this everything you ever wanted to know about Advanced Pricing processing? Nope. But it has a great process flow chart, key file names, some great tips, and a summary of enhancements since E1 8.9.

E1 W **Sales Order and Advanced Pricing Tips, by Jane Perry with Bernie Augenstein.** If you attended Collaborate 08, you had the opportunity to attend seven JDEtips sessions. If you didn't make it to Denver or didn't have a chance to attend the presentation on Sales Order and Advanced Pricing tips, now is your chance to catch up. Some of these have been published before, but there are some new wrinkles in some of the oldies! We'll talk about some Address Book management techniques, we'll inactivate a customer, look into Price Adjustments, Basic and Advanced Preferences, and Bernie Augenstein shares some special techniques learned at Batesville Casket.

E1 W **Preventing Lost Price Adjustments While Overriding Prices, by Jane Perry.** Sometimes you gotta do it. At some point, you'll need to allow your customer service reps or sales team to override the programmed price for a customer in EnterpriseOne®. But, you know what happens then, right? Overriding the price clears the Price History. And the rest, shall we say, isn't pretty. So is there anyway around the perplexing problem? "YES," says Jane Perry. Jane provides some tips to help you keep price adjustments in place when the need to override is there. Hey you World clients – don't feel left out! This article applies to you too, with one or two minor differences. A summary of those differences is at the end of this article.

E1 **Advanced Pricing 8.12 Enhancements, by Jane Perry.** What's new in JD Edwards EnterpriseOne Advanced Pricing 8.12? Advanced Pricing guru Jane Perry gives us a sneak peek at some of the enhancements that come with the 8.12 release that are geared to giving some oomph to performance and functionality!

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E1 W **Debunking Common Misconceptions about Advanced Pricing, by Andy Klee.** More proof that what happens in Vegas shouldn't always stay there. . . this time, our fearless publisher (that would be Andy) tackles two long standing myths that were dredged up and effectively squashed during his presentation on Advanced Pricing at Collaborate07. So, if you, too, have wondered about turning on Advanced Pricing for just one branch, or had questions about when it's normal to get a "no base price in effect" warning, then we have some answers for you!

E1 W **Advanced Adjustment – Rebate Processing, by Andy Klee.** Do you offer your customers rebates for purchasing over a certain amount during a specified period of time? That is a great sales strategy, but how complicated is it to set up in your system? Well, no worries, because the whole setup is explained in detail in this white paper. This paper is taken from a chapter in the JDEtips University Advanced Pricing Mastery Level Workshop manual and serves as a companion piece for the Flex Accounting in Advanced Pricing article by Andy Klee in the March/April 2007 issue of the JDEtips Journal.

E1 W **Flex those Adjustments! Or Why Flex Accounting Can and Should be Used with Advanced Pricing, by Andy Klee.** You can teach old dogs new tricks, and Andy's so happy to have this one 'bagged' that he's begging to share it with our JDEtips audience. Well, we know better than to turn down the boss…so here's his take on an advanced Advanced Pricing topic. Although this article uses Rebates as an example of when to use Flex Accounting, the reader is cautioned that a more thorough understanding of rebates themselves involves reading "Advanced Adjustments – Rebate Processing", a separate white paper which is also being released with this issue of JDEtips.

E1 W **Advanced Pricing – Rules of the Road, by Andy Klee, Publisher of JDEtips and President of Klee Associates, Inc.** We decided to let Andy have a crack at this topic because: 1) he has lots of expertise in Advanced Pricing, 2) we needed another article, and 3) he is, after all, the Publisher! Actually, Andy came up with this "Rules of the Road" concept because he's got a lot of pricing knowledge that has built up in his brain over the years, and he needed to get it out on paper before he blew a valve, or (more likely) started forgetting it.

E1 **Rounding Options and Advanced Pricing, by Marshall Baird.** It happens to the best of us. We make a decision to upgrade, based on a feature or two that we thought was the BIG thing. . only to find out that, in reality, it might be great for someone—but it's not what we need. JDETips newcomer Marshall Baird shares his tale of what it was like to upgrade to JD Edwards® 8.11 for Rounding Rules—and his company's discovery that what they wanted all along wasn't in the feature they so desired. But, all's well that ends well. . Baird shares his journey of what they learned through trial and error, their final work-around solution, and a few pointers—in case what didn't work for them may meet your company's needs.

E1 W **Price Management – What Is It & Are We Doing It?, by Russ Bartunek** Optimization… Execution… Enforcement… Does your ERP system help you with all these aspects of price management? Does your business process even provide the data required to fulfill these expectations? In this article, Russ Bartunek gives us a rundown on what price management really is, and gets us started on the road to inspecting our current practices and looking into an add-on price management product.

E1 **Tricks for Processing Replacement Orders, by Lisa Coble.** This tip addresses three issues that were encountered daily in a company that firmly stands behind their Satisfaction Guaranteed statement. There are instances where for a multitude of reasons they have to replace the customer's order at no-charge. With Advanced Pricing, all that was needed was ONE Adjustment with merely TWO lines of detail and ALL problems were solved.

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E1 W **Pricing Analysis Using Sales History - Made Simple, By Kathy Adams.** Wouldn't you love to be able to do "what-if analysis" on your pricing **before** you go update your pricing files? And be able to do this without printing a bunch of reports and then manually re-entering pricing data into a spreadsheet or other tool? Kathy Adams provides design advice for creating a great time-saving method of extracting pricing data and presenting it to the marketing analysts so they can tweak the data to derive the optimum margins—and then automatically update the pricing files with their results!

E1 **Advanced Pricing 8.10 Net Change, Part IV, By Russ Bartunek.** Here's our fourth and final article on 8.9/8.10 changes to Advanced Pricing and Sales Order Management. Have we covered it all? Probably not. But we've certainly hit the high points. As Russ mentions, he's written an entire book (over 300 pages) detailing every Advanced Pricing enhancement, step by step. To acquire a copy of Russ' book, please go to www.JDEtips.com/Books-AdvPricingNetChange.htm. Clients only, please. Check out our schedule of publicly available training classes and sign up now for the February 2005 Advanced Pricing class of your choice.

E1 **Enhancements to Advanced Pricing in EnterpriseOne 8.10 — Part III, by Russ Bartunek.** Here's our third article on 8.9/8.10 changes to Advanced Pricing and Sales Order. Five years of development went into the software, so we're flying pretty high here. As Russ mentions, he's written an entire book (over 300 pages) detailing every Advanced Pricing enhancement, step by step.

E1 **Enhancements to Advanced Pricing in EnterpriseOne 8.9/8.10 (Part II), by Russ Bartunek.** With this article, we continue our series on the enhancements in the Advanced Pricing area for EnterpriseOne® 8.9. The previous installment was Enhancements to Sales Orders and Advanced Pricing in EnterpriseOne 8.9, published in the May/June 2004 issue of JDEtips. Subject Matter Expert Russ Bartunek does a grand job of showing us how it was before and how it is now! You'll find this easy to read and full of great information – it's going to give you ample justification for upgrading if you are a heavy user of Advanced Pricing.

E1 **Enhancements to Sales Orders and Advanced Pricing in EnterpriseOne 8.9, by David Johnson.** It's springtime, and a young man's (and young woman's) thoughts turn to all the sexy enhancements in Sales Order and Advanced Pricing in EnterpriseOne's new release. Dream of what could have been, and what could be. Que Sera Sera! Who better than our Order Fulfillment writer, David Johnson, to unravel these sweet mysteries? You'll be impressed – as Andy Klee, Publisher of JDEtips says, "lookout! They've doubled the functionality of Advanced Pricing."

E1 W **Special Charges at the Line Level in Advanced Pricing, by Lisa Coble.** Lisa again takes off on a JDEtips that she got from our Mastery Level Advanced Pricing class and does it one better. This tip involves how to add a flat amount, at the line level, including quantity breaks.

E1 W **Standard Pricing vs. Advanced Pricing, by Andy Klee, Klee Associates, Inc.** f you are using JDE's Standard Price Rules instead of Advanced Pricing, this article may provide just the incentive you need to get moving with the very powerful features of Advanced Pricing. Those of you who know Andy, know that Advanced Pricing is his favorite module. Find out why in this "blast from the past". Please note that this article applies equally to both WorldSoftware and OneWorld.

E1 W **How to Round Unit Prices with Advanced Pricing, by Lisa Coble, Carolina Biological.** This tip is one that will go directly into our Advanced Pricing Mastery Level Workshop as a featured tip. We've been aware of the fact that you could manipulate Advanced Pricing to round prices, but never really figured out how to do it. We think you'll agree this is a winner and a great illustration of how JDEtips helps you solve business problems without expensive customization. Rounding problems no more!

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E1 W **Free Goods With a Minimum Quantity Requirement, by Sue Maiwald, Klee Associates.** Sue is an expert in Advanced Pricing and is a certified JDEtips Mastery Level Trainer. This tip shows how to setup a free goods rule where the customer must by a minimum quantity to qualify--a very creative solution!

E1 W **Advanced Pricing Issue of JDEtips (Revised May, 2002) by Andy Klee, Klee Associates.** Andy is recognized worldwide as an expert at Advanced Pricing. He has taught his custom 4-day Mastery Workshop to over 50 clients, and keeps updating his 450 page Workbook with new tips. Here we cover the basics plus a few advanced tips.

E1 W **Using a Catalog Code to Drive Order or Basket Repricing, by Lisa Coble, Carolina Biological.** Do you want your customers to quote a code from your product catalog when they order? Are you trying to give your customers a basket or order level discount based on that code? For example, buy any 7 items from this group and get a 5% discount? Impossible, we used to say! Until this tip came along and we realized that if you get very creative (picture pricing on its head), it can be done! This works in both OneWorld and WorldSoftware.

E1 **Min-Max Price Rules, by Russ Bartunek.** This chapter of JDEtips 9.1 Advanced Pricing training manual covers a new feature of the module. Russ Bartunek, JDE Distribution consultant extraordinaire, who is updating our Advanced Pricing manual to 9.1, wrote this as a new chapter in that ever-changing tome.

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Distribution – Inventory

E1 W **Does your Inventory Reconciliation have Integrity? (Webucation recording and PowerPoint), by Greg Caudell and Jeanene Jensen.** Sanity saving tips on JDE Inventory Reconciliation, including a detailed overview of the process, best practices, strategies, and more.

E1 **Month End Inventory-to-G/L Reconciliation, by Sande Gilbert.** Why wait until the end of the month to discover discrepancies between your Item Ledger and General Ledger? You can stay ahead of the game with help from Excel pivot tables. In this article, Sande Gilbert walks us through three easy steps she's put in place to help stay on top of reconciliation so that her month end close is much less stressful. Best part: no system configuration or exhaustive setup is required.

E1 W **Weighted Average Cost in JDE®: What You Should Know, by Rishikesh Arvind Kanegaonkar and Ajay Kumar Agarwal.** There are a number of ways to calculate the overall costs associated with your company's inventory. One of those ways is to determine the average cost, for which you need to know the Weighted Average Cost (WAC). In this article, Rishi Kanegaonkar and Ajay Agarwal review how WAC is calculated in JDE, including setup, various functionalities available, and the considerations you'll want to take into account, along with the best practices and lessons they've learned along the way.

E1 W **Inventory Commitments – The Basics, by Jane Perry**. Available **and** committed? In the real world, those two terms are decidedly contradictory. In JD Edwards®, it's one of those concepts that can be clear as mud—unless, of course, someone takes the time to clarify things. And Jane Perry is the perfect person to tackle Inventory Availability Commitments. In this article, Jane will explain the terminology involved, review the system setup requirements for commitment processing, test various scenarios, and then wrap it up with a discussion on the Repost Active Sales Order application. Ready to commit now?

E1 W **Best Practices in Naming Items and Locations, by George Hollowell.** What's the opposite of an intelligent item numbering scheme? In addition to answering that question (politely, we might add), our resident Inventory and Warehousing expert, George Hollowell, provides us with the dos and don'ts to consider when deciding on naming conventions for items and locations. In this article, George takes us through item and location setup, including several tips and best practices you'll want to heed in order to keep your items and locations named in a logical (if not "intelligent") manner.

E1 W **Inventory Management: A Cost Saving Treasure Hunt, by Tyler Simonton.** It's the message we've been sending throughout this recession—now is NOT the time to screech to a halt and try to "ride it out" with a complete bunker mentality. Savvy companies are the ones who are using this slow time to prepare for the eventual economic upturn by initiating those projects that, when things are swinging, no one ever seems to have the time or resources to accomplish. Distribution, in particular, is one area that's ripe for making improvements now. Tyler Simonton presents six Inventory Management initiatives—ranging from quick wins to larger efforts—that you can apply now, and that will benefit your bottom line both now, and in the future.

E1 W **Inventory As-Of Processing, by Sean Collins.** It's the next best thing to traveling back in time to see what your inventory looked like at a particular date! Sean Collins joins us this issue to present the setup of and address the many benefits of the oft-overlooked As-Of process. Imagine being able to reconcile inventory more easily, or create comparison reports from one year to the next without spending a considerable amount of time. This process presents a nice "snapshot" you can keep on hand for when you really need to go back in time!

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E1 **Cycle Count by ABC, by Tyler Simonton.** Can ABC-based Cycle Counting be as easy as 1-2-3? Let's find out as we welcome Tyler Simonton to JDEtips. A first-time contributor, Tyler takes up this oft-forgotten Inventory topic, and walks you through the toughest part: initial setup. He also does a great job of pointing out those other stumbling blocks we love to call "gotchas". So, if you're tasked with exploring Cycle Count and ABC analysis and want to get ahead of the game, it's time to read up.

E1 **Inventory Commitment Based on Lot Expiration Date in Xe, by Sushma Katepalli.** "Don't send me anything that's going to expire in less than six months!" Some customer requirements are hard to manage; this one requires a considerable amount of communication from sales order to pick sheet. Traditionally, it's been a manual process that has had the accuracy of looking at a crystal ball. With the expense of crystal shoes! There's a process, though, that can make this once tedious and error-prone measure much more automated. Sushma Katepalli takes you step by step through this setup which will get you well on your way to more clearly communicating your customers' expectations from the moment the order is placed until it's shipped.

E1 W **Returnable Containers with Deposit - A Simple Method Using Free Goods in Advanced Pricing, by Gareth Jones.** The "KISS" method at its finest! While it's great to have sophisticated tools at our disposal, sometimes a simple solution is all we really need. You might not need the complexity of the Container Management module to track the containers when all you want to do is just track the money. This article steps us through a process for collecting and refunding deposits for returnable containers when there is no need to account for each one.

E1 W **An Introduction to Bulk Inventory, by Ted Aseltine.** When is Bulk Inventory not Bulk? Isn't a truckload of fresh corn considered bulk inventory? Well… not if you are measuring in JDE. This article clears up the questions surrounding the use of the bulk functionality – what it is used for, what it is NOT used for, and why it works the way it does. There's a self-test toward the end that will help you decide whether you should consider implementing this powerful feature.

E1 W **Advanced Stock Valuation, by Jane Perry.** Advanced Stock Valuation is one of those "stealth" modules that no one seems to know about and few have implemented. Although designed with the help of JDE's Energy and Chemical clients, it has broad applicability to any company wanting to value its on-hand inventory and also know its cost of sales on a FIFO, LIFO, or Average Cost basis. And if you are using lot numbers to do FIFO or LIFO valuation, you really owe it to yourself to check out this module. Why junk up your inventory records with lot numbers, if what you really need is accounting information?

E1 **The Elephant in the Room – Secondary Unit of Measure, By Russ Bartunek.** The Elephant in the Room – or, in this case, 1,038 pounds of squirrels. You'll have to read the article to understand that remark! Even if that doesn't pique your interest, you'll want to read this to learn the whys and wherefores of the new Secondary Unit of Measure that popped up in EnterpriseOne® 8.9. Russ explains how it works, why you might need it, and best of all – why you might **not** need it.

E1 **Flex Accounting for Inventory Transactions, by Bob Pizzoli.** Talk about hidden functionality?! This article is a model JDEtip because it points out a secret that probably even the Oracle/PeopleSoft/JDE developers have forgotten. One of our long-standing desired articles has been for someone to write about Flex Accounting and Inventory. We know it works for Sales Orders, but Inventory has always been a big fat question mark for us. Bob Pizzoli shows us how to set up the system to use Flexible Accounting with Inventory transactions.and to make it all easier to understand, Bob has based this article on a real-life scenario and walks us through the steps to show the setup and the results. Just when you thought you knew flex accounting, Bob proves you wrong (or at least he proved us wrong) by pointing out an entire setup form that we bet 99% of our readers have never seen before. Gotta love it!

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W **Make Inquiry Easier in the Item Master - A WorldSoftware Tip, by Jim Rubino, Fike Corporation**. In a WorldSoftware environment, we know how annoying it is to have to blank out the short item number in the Item Master when doing repeated inquiries. If you aren't careful you could not notice you haven't inquired on the next Item, and wind up changing the wrong Item Master. Jim's tip is one of those easy custom fixes that is really worth the effort to implement and maintain.

E1 W **Cycle Count Tips: Yes, You Can Do Business While You Count, by Andy Klee, Klee Associates and David Mallory, Denver Water Board.** Tips and tricks to know when doing cycle counts. Know when you have to "go manual" if you want to keep shipping product while you count. This white paper contains a very detailed, step-by-step, analysis of the entire procedure.

E1 W **Stock Reconciliation and Integrity, by Ian Simmons, Xayce PLC.** This is an incredibly detailed paper which deals with one of the main problems in any automated system – integrity between the Item Ledger and the Inventory Account in the General Ledger. Ian discusses integrity checks the system way, followed by a technical section that goes through techniques for performing reconciliations outside of the system, and/or defining new reports you may want. Finally, Ian goes into some of the real-world errors and scenarios he's come across.

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Distribution – Procurement

E1 W **Procurement AAIs – Or, "Where did *that* error come from?",** **by Russ Bartunek.** Mystery errors in Procurement transactions? No user-related changes? Well, have you checked your AAIs? Russ Bartunek shares his vast knowledge on Procurement AAIs that can mean the difference between a perfectly processed transaction and one that results in dreaded errors. Learn how AAIs related to Inventory Receipt, Landed Cost Adjustment, and Cost Adjustment work and how you can use them to prevent purchasing transaction hiccups in the future.

E1 W **Exploring DMAAI 4332 - Cost of Sales,** **by Tim Scott.** Distribution and Manufacturing Automatic Accounting Instructions (DMAAIs) offer a communication conduit between a company's financial team and those who make and ship the products. But DMAAIs are only beneficial if you know which ones to use and when to use them. In this article, Tim Scott provides insight into the little-known Procurement DMAAI 4332 (Cost of Sales). He'll take us on a tour of the tables associated with 4332 and describe the scenarios in which use of this DMAAI will be of most benefit to your organization, examples included.

E1 **Drop Ship Costs by the Mile (or Kilometer),** **by Tim Scott**. Your supplier is located in Tucson and your customers are located in Phoenix, Denver, St. Louis What will it cost to ship your product to each of these cities from your supplier's location? Are you having flashbacks to 4th grade and math "word problems" yet? Rest easy, you won't have to rely on your math skills to help you solve this one; JD Edwards® has the solution for you in Advanced Procurement Pricing. In this article, Tim Scott demonstrates how to utilize this functionality to calculate costs based on miles.

E1 W **Automating Vehicle and Equipment Purchasing Using Standard Kit Processing,** **by Sarah Mills**. This article is a perfect example of what happens when you "Think JDE®". Sarah Mills and her team thought outside the box to use standard JDE Kit Processing to resolve a perplexing purchasing problem. This case study shows how a once tedious manual process prone to errors has been automated. See how they did it—with very little setup, too.

E1 **The Purchase Order Generator in JD Edwards®: An Overview,** **by Brian Gilbert, Klee Associates, Inc.** Waste not, want not. It's a lesson our parents have repeated for years. And what better way to practice this motto than to streamline your purchasing processes and order what's needed, when it's needed. In JD Edwards, one such tool, the PO Generator, can help you tackle that task. Brian Gilbert provides an overview of this functionality, including the setup steps required.

E1 W **Non-Inventory Procurement,** **by Serge Houde.** Want to control costs a little more tightly this year? We thought so. Perfect timing for our first article on non-inventory procurement. Serge Houde gives us a great, detailed tutorial of all the features included in both World® and EnterpriseOne®.

E1 W **Landed Cost Overview and Tips,** **by George Hollowell.** You've asked for one and George Hollowell delivers. We are very pleased to present this comprehensive overview of JD Edwards® Landed Cost functionality. George discusses the setup, various landed cost rules and how to apply them, and of course, tips for making this venture much more efficient and beneficial to your organization.

E1 W **Procurement AAIs—Typical Business Examples,** **by Mark Williams.** Here's an article designed to help you take some of the guesswork out of AAIs before your next Procurement project. According to Mark, the key is to understand how AAIs pair up to control the transactions that affect the balance sheet or P/L statement. Mark uses several business scenarios and matrixes to help you become more familiar with this task.

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W **Purchase Approval Processing: Automating World®'s Approval Delegation, by Rick Snell.** Your key materials purchaser is about to head off on a week-long vacation, and you need to ensure that another colleague has the authority to approve purchase requisitions forthcoming during that time. And, this approval authority is just until the key purchaser returns. Can you remember to do all that in your busy schedule? If not, Rick Snell demonstrates a nifty way to automate that process in the Approval Delegation program, P43280, that allows you to make future delegation changes to your World Purchasing approval list, and then have the system set up for a round-trip approval back to the original approver.

E1 W **Automatic Accounting Instructions for Procurement, by Jane Perry.** Having trouble setting up AAIs in Procurement? Take heart, says Jane Perry—it's not exactly what you'd call intuitive. That's why she's shedding light on their setup, plus other tips to help you better understand these "out of sight, out of mind" instructions. One cool thing about the AAI concepts described in this article is that they apply to both World® and EnterpriseOne®!

E1 **Procurement Net Change – Two New Features, by Jane Perry.** JD Edwards® Procurement application offers two enhancements that can significantly increase your accuracy and productivity: Cascading Receipts, for deliveries from several POs, and Multiple Account Distribution, for allocating expenses across multiple accounts. We're pleased Jane Perry has returned to share a sneak peek at Klee Associates latest Mastery Level Workshop: Distribution Net Change! (If you like this article, you're going to *LOVE* Jane's class!)

E1 W **Vendor Rebates in Procurement using Advanced Pricing, by Ted Aseltine.** You pays yer money and you makes yer choices. Mastery use of vendor rebates can make heroes of your purchasing agents because this has a direct impact on your profit margins. But which direction do you want to take? Use the rebate functions in Procurement and have enhanced tracking at the sacrifice of any accounting interface? Or really "Think JDE" and set up the rebates through Advanced Pricing, where the accounting side is automatically handled, but your agents won't get Work Center notification of approaching rebate thresholds. Read on while Ted Aseltine thoroughly dissects the two methods, so you'll know which one works best for you (it could mean using BOTH).

E1 W **Following up on Empties, By Jan Stas.** What to do with all those empty crates that are piling up against the back fence? They came from someplace and they've got to go back some place. It's the process of keeping track of where they came from, getting them back to that vendor, and keeping track of whether we are due a refund upon their return that had this company in a quandary. Jan Stas describes here how they used standard functionality in EnterpriseOne® (8.10) to set up the system to properly manage and account for empty shipping containers.

E1 **8.10 Procurement Enhancements, by Russ Bartunek.** What'll they think of next? Or… what have they done now? Russ Bartunek has an insatiable curiosity, so he went looking for some answers. Here is his report on the significant enhancements for EnterpriseOne® 8.10 Procurement. Learn all about the long dreamed-of Complete Order Cancellation, the 3-Way Match Controlled by Line Type, the New A/P Trade AAI, and the Enhanced Approval Processing. You'll find out the good, the bad, and what could have been ugly if you hadn't read this article before you implemented 8.10.

E1 W **Electronic Approval Routing, by Pat Martino.** This article describes how to use the Workflow concept to effectively manage the Procurement approval process. Learn about approval routes, approval levels, order activity rules, and other setup. You can learn more about Procurement best practices by signing up for the JDEtips Mastery Level Procurement Workshop, which is based on the book Pat wrote. Learn more: http://www.jdetips.com/WorkshopDescriptionsProcurement.asp

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E1 W **Inspection Processing of Inbound Goods – Receipt Routing / Supplier Analysis Primer, by Pat Martino, FOCUS Systems.** Most of you are probably familiar with JDE®'s Receipt Routing functionality. Clients typically use it to track product once it leaves the vendor's dock, moving it through several steps, including an optional inspection step. Supplier Analysis is used to rate suppliers in terms of performance in delivery quality products. For those not familiar with Receipt Routing and Supplier Analysis, Pat Martino, our Supply Chain expert, has written a two-part series intended to help you realize the full value of this functionality. Pat begins with the basics – how to get started using Receipt Routing and Supplier Analysis. Even experienced users of Receipt Routing will pick up some useful tips with this introductory article.

E1 **Improving Productivity by Streamlining the Form Tab Sequence, by Susan Stooksberry, CPA, CIA, CISA, Klee Associates.** Talk about a useful tip! Susan shows you how, with a few minutes of effort, you can make data entry easier for often used programs like Invoice Entry. Taking this tip to the next level, you'll see that you can apply this to any OneWorld® data entry form. Just be aware that any changes will need to be documented and applied again after future ESUs are applied.

E1 W **Inspection Processing of Inbound Goods for Manufacturing – Adding MRB to the Process, by Pat Martino, FOCUS Systems.** Pat Martino shows readers utilizing basic Receipt Routing functionality how to “kick it up a notch” to handle MRB and to get the real picture in your supplier analysis. Included is a "best practice" approach for handling the statuses and disposition of rejected – or partially rejected – lots of received goods, as it happens instead of waiting to the end of the process. If Pat’s previous article on setting up Receipt Routing whetted your appetite, this should surely satisfy! This article applies equally to WorldSoftware™ and OneWorld®.

E1 W **Supplier Consigned Inventory, by Pat Martino, FOCUS Systems.** We see questions on this topic all the time on various user group bulletin boards. There's a right way and a wrong way to do this. Shouldn't you do it the right way? Learn from one of our best consultants, Pat Martino. One of our most popular white papers.

E1 W **Evaluated Receipts, by Mike Thompson.** Thinking of using Evaluated Receipts (that's where you pay off the receipt, and there is no invoice from your supplier)? If so, you'd best read this first—lessons from a consultant who has been there and done that! Besides an excellent overview, Mike also covers a number of advanced tips in the second half of this white paper.

E1 W **Inbound Goods Freight Claims Processing, by Pat Martino, Focus Systems.** Although freight claims are processed by practically every JDE client, it is surprising how few have clearly defined system processes in place to handle them. Both WorldSoftware and OneWorld provide versatile functionality which can handle freight claims. Come away with a better understanding of best practices after reading Pat's article.

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Distribution – Sales Order Management

E1 **Basket Repricing's Almost Undocumented Feature, by Tim Scott.** In this article, Tim Scott highlights a little known, almost undocumented feature, in basket repricing that can help you correctly reprice items that are the same, yet sold in different units of measure. This tip will definitely benefit many clients who use Basket Repricing.

E1 W **When Sales Update (R42800) Goes Bump in the Night, by Tim Scott.** It's almost like you can hear the suspense-driven horror music in the background. . . it's the dreaded Sales Update error message! If you're jumping out of your skin--fear no more. Tim Scott offers up some tips to help you troubleshoot these messages, find the cause of update failures, and some best practices and solutions to overcome some of the most frequent causes. And a shout out to our readers who asked us to take on this challenge. We're happy to help!

E1 **Sales Order Quick Reference Cards, by Ted Aseltine**. This handy two-page reference is designed to be printed on both sides of a page so you can slip in under your keyboard and have it handy as a reminder. Feel free to have it laminated. Is this everything you ever wanted to know about Advanced Pricing processing? Nope. But it has a great process flow chart, key file names, some great tips, and a summary of enhancements since E1 8.9.

E1 W **Order Activity Rules 101, by Russ Bartunek.** So, you didn't graduate from the OAR School of Excellence (does it even exist?). Does that mean you're not allowed to touch Order Activity Rules? Relax, says Russ Bartunek. While improperly set up OARs can result in some major issues, Russ provides some great tips to ensure that your OARs are properly configured, as well as a review of the areas in which an improper setup can have the most impact (read damage).

E1 W **SO Order Preparation Days, Delivery Date Preference Processing – An Overview, by Brian Gilbert.** On time delivery—it's what our customers want and what we have to provide them with. So how do we accomplish this in JDE®---it's a matter of preference, or more precisely, two preferences: Order Preparation Days and Delivery Date. In this article, Brian Gilbert takes a look at how these two sales order preferences can be used in tandem to calculate the pick and ship date in JDE, based on the manually entered order date and required (delivery) date that meet your customer's delivery needs.

E1 W **JD Edwards® vs. SAP® Sales Order Processing, by Ted Aseltine and Thomas Woelfel**. Are all ERP systems created equal? Well, not quite, but in the case of SAP and JD Edwards Sales Order Management, maybe more equal than not. We challenged a JDE® expert and an SAP expert to explore the differences and similarities of the two systems. If nothing else, the ensuing article gives a great overview of Sales Order functionality for both JDE and SAP.

E1 W **Cycle Billing 101, by Russ Bartunek.** If you're getting ready to set up Cycle Billing in JD Edwards®, and you want to avoid a situation that resembles a 50s horror film, Russ Bartunek has your back! Order Activity rules, AAIs for deferred entries, Cycle Billing Accounting, and more—this primer has it! Russ covers the nitty-gritty you'll need to know in order to set up those particular customers for whom ordinary billing dates don't apply. Read on and learn how you can avoid the primal screams commonly associated with this functionality's set up.

E1 **Customer-Centric Lot Processing Via Advanced Preference 23: Advanced Lots – Ship Ascending, by Susan Stooksberry.** What happens when you put Lot Processing and Advanced Preferences together? You get some great functionality that allows you to better serve your customers, especially those with stringent requirements when it comes to expiration dates. Susan Stooksberry details the features of this combo, including user-defined dates in the Lot Master, and inventory commitment by Customer Group. She also clues us in on some important gotchas you'll want to heed when using this powerful duo.

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E1 **Power Forms for CSRs: Sales Order Entry P42101, by Russ Bartunek.** Streamline your order entry process for high volumes of one or two-line sales, without major modifications to P4210? Yes, you can! Russ Bartunek demonstrates a nifty application: "Sales Order Entry for Customer Service Representatives" (P42101). New with EnterpriseOne® 8.12, this application was developed using the Power Forms tool. Russ steps us through order creation, processing options, task flow, and the net change from P4210.

E1 W **Counter Sales: Using JDE® as a Point of Sale (POS) System, by Susan Stooksberry.** If you do a small of amount of point-of-sale business, and you're looking for a simple solution for counter sales, Susan Stooksberry has the answer. In this article, Susan demonstrates how vanilla JD Edwards® Point of Sale capabilities can be configured and rapidly implemented for small-volume counter sales. Susan provides the steps for setup and best practices you'll want to follow in order to get the most value from this creative solution.

E1 W **Everything You Wanted to Know about Branch/ Plant Constants but Were Afraid to Ask, by Jane Perry.** Okay, you might not be all THAT afraid to ask about Branch/Plant constants, but chances are, it's one of those topics that you don't really spend time thinking about until you need to work them. And then it becomes a mission to find someone who does understand what these constants are used for and how to use them. Jane Perry has been there, done that, and now presents this article for anyone who needs a primer on the successful use of Branch/Plant Constants in the JD Edwards® Advanced Pricing module.

E1 W **Sales Order and Advanced Pricing Tips, by Jane Perry with Bernie Augenstein.** If you attended Collaborate 08, you had the opportunity to attend seven JDEtips sessions. If you didn't make it to Denver or didn't have a chance to attend the presentation on Sales Order and Advanced Pricing tips, now is your chance to catch up. Some of these have been published before, but there are some new wrinkles in some of the oldies! We'll talk about some Address Book management techniques, we'll inactivate a customer, look into Price Adjustments, Basic and Advanced Preferences, and Bernie Augenstein shares some special techniques learned at Batesville Casket.

E1 W **Interbranch Sales Orders, by Jane Perry and Mark Willliams.** We recently added a new section to our JDEtips Mastery Level Sales Order workshop manual. All about Interbranch Sales Orders. Jane Perry wrote the original material, and Mark Williams has added some additional insight. We felt this was the time to share this information with you in our Document Library. In our next issue, Mark will provide the counterpart to this paper – the Accounting side of Interbranch Sales. Stay tuned.

E1 W **Flex Accounting – Lazy Is Good!,** by Russ Bartunek Is Flex Accounting one of those features you thought you'd get around to looking at someday? Today's the day! Besides covering Flex Accounting, Russ makes a convincing case for all "Distribution types" to get more involved in AAI setup. The more you know about AAIs, the more you can positively impact your Sales Order and other Distribution setups. If you let the accountants do all the AAI setup, it's possible your Sales Order setup will become overly complex**.**

E1 W **Accounting for ST/OT Transfers: *Believe it or not, Reversing an ST/OT is Best Handled with a Negative Transfer,* by Russ Bartunek.** Never fear, Russ is here! He's got the whole ST/OT accounting thing worked out, along with a surprise twist when it comes to reversing an ST/OT. He even shows us Distribution types and how and when to use InterCompany AAIs. Whew. And we thought "debits go on the side nearest the window" was all we needed to know! **Please note:** This article applies to all versions of World® and EnterpriseOne®.

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E1 **Overcoming Pitfalls of Prepayment Processing in EnterpriseOne, by Jeanne Robbins.** Credit card payments are a way of life for many businesses, yet processing payments using JD Edwards EnterpriseOne's Prepayment Processing isn't that easy. There are a few issues and pitfalls that need to be overcome so that credit is authorized correctly and orders are processed properly. Jeanne Robbins takes us through some issues you may encounter and provides some work-arounds and tips to keep your processes flowing smoother.

E1 W **The Hitchhiker's Guide to Sales Order Management, by Russ Bartunek.** My, my—isn't someone all too happy to share what he did in Vegas? Well, maybe not **everything** he did, but we're sure you'll appreciate the Cliff Notes' version of Russ Bartunek's Collaborate 2007 presentation. Russ loves to share nifty tips on how to make the most of Sales Order Management; this time, he gives us some thoughts to ponder about how to avoid potential disasters (or at least, headache producing issues) related to Address Book, Flex Sales Accounting, Preferences, and Customer Master data. Now, stick that thumb out if you're interested in catching a ride with Russ!

E1 **SARs – More Than Just a Pretty Acronym, by Russ Bartunek**. Some things just don't get the attention they deserve. And, based on one editor's frantic experience with on-line shopping this holiday season ("What do you mean it's BACK ORDERED? I need it under the tree next week!"), it's very likely many companies aren't exploring their options when it comes to SARs—Substitutes, Associated, and Replacement items. And when we say "options", we mean that literally—as in the Processing Options for JD Edwards® Sales and Purchase Order Entry. Fortunately, Russ Bartunek joins us again to untangle the mystery that is the "Cross-reference" tab and to show us a handy new feature in 8.9. If you haven't explored this wonderful feature, it's definitely worth a look!

E1 W **Enforcing Quantity Multiples in Sales Order Entry, by Russ Bartunek.** "Everyone" knows that JD Edwards Sales Order Entry doesn't enforce quantity multiples, right? If you want to sell an item only in multiples of 12 you're stuck with a training issue for your CSRs—they have to tell customers that they can't order 14 – only 12 or 24. Right? WRONG! When we heard about the concept explained in this article, we became very excited—because we know there's lots of you out there suffering with this problem. Without any further ado—we present another instant JDEtips classic.

E1 **Advanced Preferences in 8.9, by Jane Perry.** If you've already mastered the Basic Preferences of the Sales Order application, now it's time to move on to the advance functions that make sales order management easier than ever! Jane Perry takes you step-by-step through the Advanced Preferences for Sales Order Processing that come with the release of 8.9. (Learn more about Advanced Pricing and Sales Order Management when JDEtips University comes to Dallas in October!)

E1 **Flexible Sales Commissions in 8.9, by Jane Perry.** Is there anyone out there who thinks JD Edwards has been historically weak in its ability to calculate sales commissions? OK, everyone put your hands down, please! We wouldn't point that out if we didn't have a good answer, right? Actually Jane Perry has all the answers in this article. For those of you on E1 8.9 or higher, you'll notice some new Commission functionality. You'll still need a custom report, probably, but at least the raw data is becoming more useful. Jane does a great job leading us through a detailed example of just about every possible calculation.

E1 W **SOM Sales Order Management-Based Profitability Analysis: Creating Credit Orders without Impacting Inventory, by Susan Stooksberry.** Almost everyone knows how to create Credit Memos from History. (If you don't know—email us and we'll send you an excerpt from our own Sales Order Management training manual.) But there are legitimate reasons to create Credits manually, particularly when a Credit does not apply to a particular Sales Order. Susan explains why those should be done in the Sales Order system (as opposed to entering directly into A/R), and gives detailed, step-by-step instructions as to how to do the setup and entry of these orders.

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E1 Sales Order Management in the Post EnterpriseOne XE/8.0 World, By Russ Bartunek. Russ delves into the enhancements in the Distribution suite to see what's new and improved for JD Edwards EnterpriseOne 8.9 and 8.10. We had touched on Sales Order Management enhancements last year, but Russ decided to dig deeper and find some more goodies that we feel you will want to know about. Here, you'll learn about Original vs. Reprint Options on Documents, Date-Sensitive Customer Sets, and Customer Segment-Based Selling.

E1 W Kit Processing in Sales Order Management, By Greg Gibson. Known as the Dracula of JDE, because your consultant will hold up crossed fingers when you mention them, Kits have been known to work for some clients. Here, our esteemed destroyer of vampires, Mr. Gibson, sets you straight on how kits are supposed to work, along with some valuable pointers to keep you out of trouble along the way.

E1 Enhancements to Sales Orders and Advanced Pricing in EnterpriseOne 8.9, by David Johnson. It's springtime, and a young man's (and young woman's) thoughts turn to all the sexy enhancements in Sales Order and Advanced Pricing in EnterpriseOne's new release. Dream of what could have been, and what could be. Que Sera Sera! Who better than our Order Fulfillment writer, David Johnson, to unravel these sweet mysteries? You'll be impressed – as Andy Klee, Publisher of JDEtips says, "lookout! They've doubled the functionality of Advanced Pricing."

E1 Joining On a Union – An Incredible Development Tool for Sales Reporting and Application Design, David Johnson. David demonstrates how a little determination and creativity can get you through obstacles that may daunt the less adventurous. Here we learn not only the basics of database joins and unions, but also how to combine the two techniques to create your own "virtual table" to get the data you really need on your Sales reports. These techniques give you tremendous flexibility and improved performance over traditional methods such as Table I/O. Don't be shy, give a copy of this to your technical folks so that they can implement this! Or even better, get them on your company's unlimited subscription!

E1 W Best Practices and the Address Book in Sales Order Management, David Johnson, Klee Associates. We finally took all the great tips we've been saving up for Sales Order users and wrote them up. David covers some super tips, on topics such as Various Ways to Distinguish and Search For Ship To and Bill To Addresses, How to Get Invoice Print to Pick Up the Correct Address by Effective Date, How to Easily Obsolete Addresses and Prevent Order Entry, and Utilizing Parent/Child Relationships. David did such a thorough job of covering this that we would have had to cut it down to fit it in the newsletter. We couldn't stand the thought of having you miss out on this valuable information, so we are publishing it as a white paper.

E1 W Sales Order Document Types: Know When to Say When, David Johnson, Klee Associates. Our latest "Back to Basics" article features how to make decisions as to how many Sales Order Document Types to use. Proliferation of Document Types is a common problem at clients who are just starting out. Learn when to say when, or you may find yourself at a JDE user group meeting, introducing yourself by saying: "Hello, my name is Bob (or Sally) and I use JD Edwards." Even those of you in a more advanced state of knowledge will find some useful tips on how to control the number of Sales Order Document Types. This article applies equally to WorldSoftware and OneWorld.

E1 W Distribution - Credit Checking and Order Holds - Detailed Case Studies of Credit Checking at the Line of Business, Parent, and Customer Levels, Peter Bannister, 1st Consulting Ltd. Peter is one of our favorite writers in the Sales Order and Distribution areas. He's an over-the-top, detail oriented consultant. His analysis of JDE's credit checking capabilities is destined to be a classic in the JDEtips Document Library. Peter even includes his excellent writeup on how the Repost Active Orders program (R42995) works with respect to reposting the Open Order Amount. Let's only hope JDE's QA department doesn't try to steal him from his lucky clients!

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E1 Controlling Sales Order Dates with the Workday Calendar, Andre Jille, Deloitte & Touche. All we can say is "Wow!" This is one of the best, clearest explanations ever written on how to take advantage of an important piece of Transportation functionality, without doing a full blown implementation of Transportation. I'm a big advocate of using pieces of transportation, where appropriate, to "enhance" the Sales Order module.

E1 W Item Restrictions to the Max! - A Full Screen Video and White Paper, Andy Klee, Klee Associates. If you haven't seen this tip, you are in for a treat. Andy's all-time favorite! Sit back and watch (and listen) as we take you through a great way to setup Item Restrictions by Item Group and Customer Group. Much better than having to do it item by item, and customer by customer. Best viewed with Windows Media Player in full screen mode. Dozens of clients have used this tip. It can also be used to restrict sale of an item prior to it's official introduction date, and track Customer-required permits which allow sales of restricted items. An absolute winner!

E1 W Using Category Codes to Enhance Your Sales Information, David Johnson, Klee Associates.
They slice, they dice! What are they? Category Codes! Wait, what are we doing, going back to basics? Well, yes in a way we are. But read on, you will probably learn some things you don't know about how to setup and maintain category codes (such as why R01050 is a great program to know about). David's expertise and real life experience shines through in this Back to Basics article, which applies to both World and OneWorld.

E1 W Automatic Sales Order Cancellation Techniques, David Johnson, Klee Associates. David's first tip, in his new role as Associate Editor for Order Fulfillment, is a winner and should prove extremely popular, as it features a creative solution to a common problem: How to cancel expired orders without doing a manual lookup of each order that needs to be cancelled. The number of hours saved by both OneWorld and WorldSoftware users should be well worth your time to read this tip!

E1 W Purging Sales Order Files, by David Johnson. Purging files is a timely end-of-year topic. If you've been live for several years, and haven't got your purging strategy down pat, here's an excellent place to start. Even if you are an experienced JDE client, be sure to check out David's list of issues to be considered toward the end of this article.

E1 Credit Card Payment Processing in OneWorld, Brenda Wycoff. Learn how OneWorld's PrePayment functionality helps process credit card payments. Brenda is a financials expert, so the section on how to handle the payment in Accounts Receivable (with or without Drafts) is especially helpful.

W Credit Card Processing With WorldSoftware, Mark Chess, LCS Inc. Credit card processing is becoming more important to JDE clients as more business-to-business transactions are paid by credit card. Mark Chess' article is a brilliant summary of what you need to do starting with WorldSoftware as the foundation. Even OneWorld clients should read this, plus Brenda Wycoff's article on OneWorld Credit Card functionality. You will be far ahead of the game, after reading these articles.

E1 W Preference Processing Issue of JDEtips, Andy Klee, Klee Associates. Preference processing is a powerful tool in JDE's Sales Order Management module. Gain the necessary understanding through a solid overview and several pages of advanced tips. (Learn even more through our Sales Order Management Mastery Workshop!)

E1 W Handling Customer and Item Exceptions to Standard Tax Rates, Dan Bolland. We all know that in implementing JDE, the exceptions take more time to setup than the normal process. Learn how to setup variations on your standard tax rates for different customers, and different items. Dan's examples are Canadian-based (think GST and PST), but the scenarios apply worldwide.

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E1 W **Converting Sales History and/or Creating a Legacy Interface, Andy Klee, Klee Associates & Scott Beebe, AMX.** Learn the secrets of interfacing sales order data into JD Edwards. Use the same programs to easily convert sales history into JDE before going live. This Whitepaper was updated in August, 2002.

E1 **Batch Creation of Sales Transfer Orders, by Craig Potter, Tryllium Solutions.** Craig's practical experience as a consultant shines through in both his selection of topics and his detailed exposition. We've noticed clients asking how to create Transfer Orders in batch on various forums. Well, here are the answers you've been looking form.

E1 W **Reposting Commitments, by David Johnson, Klee Associates.** As a Sales Order type myself, I usually explain the difference between hard and soft commits as follows: Consider your breakfast of bacon and eggs. The Chicken? That's a soft commit. The pig? Now that's a hard commit! All kidding aside, there's excellent advice in this article regarding the Repost Commitments program (R42995 in EnterpriseOne and P42995 in World). You might be surprised at the one big Gotcha that everyone needs to know about.

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Distribution – Transportation

E1 **Transportation Management Quick Reference Card, by Tyler Simonton.** Short, sweet, and handy; that's how you'll describe this quick reference card on Transportation Management by Tyler Simonton. Tyler provides the rules of the road, tables of key programs and useful tables to know, plus a flow chart to help you understand how it all comes together.

E1 **Billable Freight Overview, by Tyler Simonton.** "Free shipping on orders over $100 through August 15". For customers, it's an incentive. For those tasked with making sure that freight charges are calculated correctly on the invoice, these promotions can pose a challenge. And that's just one example of where freight charges can be anything but straightforward. If you have a variety of freight charge exceptions you need to manage, the Billable Freight functionality found in the JDE® Transportation module can be your new best friend. In this article, Tyler Simonton steps us through setting up and applying billable freight.

E1 **Transportation Management Rules of the Road, by Tyler Simonton.** Everybody is looking to cut costs these days and one of the best ways to save is to efficiently manage your freight costs. JD Edwards® Transportation module offers a great solution to accomplish this task, but it's only as good as the data you put into it. In this article, Tyler Simonton presents some rules of the road to help you use this functionality to its fullest potential and optimize your freight routing process to both yours (and your customers') benefit**.**

E1 **How JDE's Transportation Management System Can Improve Distribution Operations, by Doug Liljegren.** Doug begins a new series of helpful articles on JDE's Transportation System with this excellent overview of how the Transportation module can streamline planning for your shipments. With over 60 tables, and 100 programs, Transportation is not a simple module to grasp and understand, but Doug does a great job showing the basics in this overview.

E1 **Transportation Issue of JDEtips, Martin Coomber, JD Edwards.** Martin Coomber is one of the few consultants who has implemented OneWorld's Transportation module. He wrote most of this early issue of JDEtips, and has given us some great, timesaving ideas.

E1 **Using Transportation to Automatically Select the Best Freight Rate, Devin Wight, Acuity Consulting.** Parcel carriers such as UPS and Fedex typically have two rate tables: Standard and Hundred Weight. Learn how to setup JDE's Transportation module to automatically pick the best rate.

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Distribution – Warehouse Management

E1 **Warehouse Management Quick Reference Card,** by **Tyler Simonton**. Short, sweet, and handy; that's how you'll describe this quick reference card on Warehouse Management by Tyler Simonton. Tyler provides the rules of the road, tables of key programs and useful tables to know, plus a flow chart to help you understand how it all comes together.

E1 W **Improving the Picking Process with Warehouse Management, by Tyler Simonton**. The key to successful shipment fulfillment? Picking, picking, picking. And that can be a process fraught with many challenges. In this article, Tyler Simonton highlights some of the common pain points that Distribution teams struggle to address and how the JD Edwards® Warehouse Management module can be used to help reduce and eliminate those challenges, such as reducing issues with split pallets/cases, automating location restock, and more.

E1 W **Inventory Control Made Easier with Default Locations, by Tyler Simonton.** Which would you rather do: Have your staff spend countless hours searching for inventory in a vast warehouse or add a couple of extra steps to your Inventory Control process that would make reconciling your system and physical inventory easier? If you chose the latter, you'll find this tip from Tyler Simonton quite beneficial. Tyler demonstrates how to use default locations in Warehouse Management to better manage your stock's location. This tip uses both newer and more seasoned JDE® features.

E1 W **Lot Control: Keeping It Fresh with JD Edwards, by Tyler Simonton.** Looking for some light reading? Better skip this article. But if you want the goods on lot numbers, we've got it here, in all its beautiful detail. Whether it's as obvious as "use by this date" or something as cryptic as MNH760908, almost every product has a lot number. Tyler Simonton takes us behind the scenes of how lot numbers are assigned by JD Edwards' Lot Control functionality, including the factors that are used to create the number that ultimately indicates the age of a product.

E1 W **LPN101 – Introduction to E1 License Plates, by Tyler Simonton.** License Plate functionality—is it a dream come true or a living nightmare? According to Tyler Simonton, it all comes down to setup, setup, setup. If you take the time to learn about it and implement correctly—License Plates can be a time-saving joy to your warehousing processes. But, take a haphazard approach and, well… it ain't pretty. Tyler has some thoughts for you to consider before setup, the basics in configuration and inventory creation using license plates, and some quick thoughts on other LPN functionality you'll want to take into consideration. Happy Tracking!

E1 W **Rules of the Road-Warehouse Management, by Tyler Simonton.** Continuing our Rules of the Road series, we're pleased to have Tyler Simonton join us to present seven simple (yet not always followed) rules to successfully employing the JD Edwards Warehouse module—and avoiding some major potholes along the way. While these tips don't even touch on all the details you'll need to know to implement and operate this powerful application, we're sure you'll find they give you a heads up that will make your warehouse operations using JD Edwards much smoother.

E1 **Setting up Cross Dock Functionality in EnterpriseOne 8.9, by Doug Liljegren, Data Systems International.** "By allocating inbound goods directly to outbound sales orders, Cross Docking offers substantial labor savings, reduces wear and tear on equipment, reduces good handling and the rate of accidental damage, speeds shipments to your priority customers, and matches specific inbound orders to specific outbound shipments." If this sounds like a sales pitch to you, it isn't. This is Doug Liljegren's summary of the benefits detailed in this article. Doug gives a rundown on the process as well as the advantages of Cross Docking, and fills us in on the latest enhancements available in EnterpriseOne® 8.9.

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E1 W **Automatically Generating UPC Codes, by Lina Hadi with Doug Liljegren.** Do you enter UPC information by hand? Here is a clever approach—use a batch routine to look for missing UPC numbers and generate a new number based on the Short Item Number. We would like to acknowledge Lina Hadi, who submitted the code, and our Associate Editor, Doug Liljegren, for explaining its use. Using this method might save hours of data entry and avoid a few errors. Find out if this technique will work for you.

E1 W **The Three Rs – Replenishment to Random Rules (RRR), Mike Lee.** In this article, Mike Lee draws on his extensive experience in the Warehouse Management area to give us some pointers on the usefulness of Replenishment to Random Rules. If this concept sounds chaotic – read on to see how it is actually quite the opposite!

E1 W **Using Reservations in JD Edwards® Warehouse Management System, Doug Liljegren, Data Systems International.** Doug continues his series of informative articles on JDE's Warehouse Management System with this excellent overview of a key piece of functionality—the ability to generate putaway reservations. He shows how this valuable tool can be used to help optimize your warehouse space and help your warehouse workers gain efficiency.

E1 W **Using JDE's Warehouse Management to Improve Warehouse Logistics, Devin Wight, Acuity Consulting.** Trying to decide if Warehouse Management is a good fit for your company? Devin's article is an excellent summary of what it does, at the 10,000 foot level. Devin is one of the few Warehouse and Transportation specialists in North America.

E1 W **Working with Warehouse Management Transactions, Doug Liljegren, Data Systems International.** As a follow on to Devin Wight's earlier article on Using JDE's Warehouse Management to Improve Warehouse Logistics we bring you this writeup by Doug Liljegren of DSI. This article explains the implications of your setup decisions and demonstrating the common warehouse transactions. This article applies to both OneWorld and WorldSoftware.

E1 W **Distribution - Fixed and Random Locations in Warehouse Management, Doug Liljegren, DSI.** Doug continues his series on Warehouse Management with an in-depth review of the assignment of fixed and random locations and the impact these decisions have on Putaway, Pick and Replenishment transactions in the warehouse. Another very informative article from a seasoned pro.

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E-Commerce

E1 W **Lessons From the Battlefield--Successful E-Commerce Projects, Dan Myers and Mike Gibson, CD Group.** Picking up where our special section on E-Commerce in the September 2002 issue of the JDEtips Newsletter leaves off, this White Paper delivers good advice from two consultants who have been there and succeeded.

E1 W **Five Approaches for Providing JD Edwards E-Commerce, Joe Domaleski, CD Group.** E-Commerce lives beyond the bursting of the Internet bubble. Most of us are still figuring our strategy. Joe has written a great overview of the five most popular and practical approaches. Read this first, if you are starting an E-Commerce project. Originally published in the September, 2002 issue of JDEtips.

E1 W **Configuring JD Edwards for the Internet, Edwin Howell, CD Group.** This article features practical set-up tips for ensuring that JD Edwards is properly configured for use with a web-enablement technology. Regardless of the technical approach, there are certain application considerations that must be fulfilled prior to the deployment of web access to JDE. Ed Howell is an E-Commerce Project Manager with years of JDE Consulting experience. Originally published in the September, 2002 issue of JDEtips.

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EDI

E1 W **EDI, by Brian Gilbert. (Webucation Event Recording)** Brian is Mr. EDI around JDEtips. He's consulted on JDE EDI implementations for over 10 years, and has authored numerous JDEtips articles on EDI. Brian will share his expertise on one of the most popular transactions, the Inbound 850, aka Inbound Customer Sales Order.

E1 **Outbound EDI 850 Purchase Order, by Brian Gilbert, Klee Associates, Inc.** EDI is an area in which some JD Edwards® customers may not be taking advantage of the software's full power. Brian Gilbert is determined to help fix that. In this article, he shows us, step by step, how to generate an Outbound PO - EDI 850 that can be sent via EDI to a supplier. The benefits alone, such as faster turnaround in receipts, which can result in lower on-hand inventory requirements, make the setup effort worthwhile.

E1 W **Mapping Extra Inbound Fields in EDI Transactions, by Jeanne Robbins**. How do you map extra fields in EDI transactions coming into JD Edwards, especially those required by the customer for outgoing documents? In this article, Jeanne Robbins presents a solution that involves incorporating the extra fields into EDI tables that already exist in JDE, and allowing the EDI processing functionality to do that mapping. No more tedious and error prone attempts to fit square pegs into round holes!

W **Using EDI 852 Transactions to Manage Mobile Inventories in World®, by Jon Curry.** Seventy-five trucks, seventy-five inventories—one really creative solution. This article by Jon Curry tells the tale of how a Canadian Maritimes' dairy coupled EDI with JD Edwards World to manage each truck's daily inventory while the drivers were still on the road. Among the things we love about this article—Jon not only shares the end result, including the steps—he also shares some solutions the company tried initially that weren't as ideal, so that you can learn from their trial and error.

E1 **EDI Trigger Creation, by Brian Gilbert.** You and your trading partner may be talking in the same terms—but when it comes to electronic data transfers and JD Edwards®, are your systems in agreement? If not, this tip from Brian Gilbert on EDI triggers may help get your systems on the same page. Brian discusses how to create triggers in both EDI 850 (incoming) and EDI 810 (outgoing) that will automatically convert unrecognizable data to something the receiving system will recognize.

E1 **Outbound Advanced Shipping Notices (ASNs) - EDI 856s, by Brian Gilbert.** It's on its way!!! Customers love to know when their orders are headed to their doors and with, the EDI 856 transaction, Advanced Shipping Notices are possible. Brian Gilbert shows us how to set up and generate this "txt" file, so that you can be on your way to giving your customers a virtual heads up that their order is on the move!

E1 **PO Approval: "Securing" Approvals from Your Users by Brian Gilbert, Klee Associates, Inc.** Anyone who's worked in an order department or in purchasing can certainly appreciate this tip presented by Brian Gilbert, our EDI expert. PO approvals can give you the peace of mind that orders have not only been placed, but placed correctly—and can be rejected accordingly as well. Brian shows you how in JD Edwards EnterpriseOne®, it is possible, with some configuration, to set up such a process so that your users can give their virtual "thumbs up" to their POs.

E1 W **EDI – An Overview, by Brian Gilbert.** As more and more companies venture into interfacing with customers, understanding EDI transactions becomes more crucial, which makes it hard to understand why this functionality in JD Edwards® remains such a mystery to some. Brian Gilbert attempts to take some of that mystery out of two very common EDI transactions: Incoming EDI 850 and Outgoing EDI 810. He'll take you step-by-step through the setup of these transactions, so that you too can have incoming sales orders with the corresponding outgoing invoices up and running!

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E1 W **Extending EDI Purchasing/Receiving to the Enterprise, Gary Bevan.** Gary does an excellent job in this overview of EDI Purchasing/Receiving. In addition to explaining the basics, he passes along some excellent tips that will make your use of EDI more productive and more likely to generate the return you expect with EDI.

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ECS (Energy and Chemical Solutions)

E1 W **Calculating Gross and Net (Ambient and Standard) Pricing,** **Andy Klee, Klee Associates.** Andy lived and breathed ECS for 8 years as JDE's lead field consultant for North American Energy and Chemical companies. This is one of his favorite ECS tips. Some customers may be invoiced for the gross gallons on a truckload, others may be invoiced for the net gallons. Save time figuring out how to do this with this tip. Not only do we give you the formula, but we also tell you what fields in the F4211 to store the gross and net gallons in. A real timesaver!

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Enterprise Asset Management

Equipment Billing and Expense Allocations – an Overview, by Scott Hollowell. Have you tried lately to find a class on JDE Equipment Billing? Perhaps you've come to the right place! JDEtips is your One-Stop Shopping place for all things JDE. Not only can you use the JDEtips Document Library for both high-level overviews like this one and more in-depth articles like Richard Berry's white paper, "Employee Time Entry with Equipment", but: You can also rely on us to provide Mastery Level Workshops in most any JDE topic. Be sure to check out our schedule for the upcoming March 2006 Workshop and be sure to contact JDEtips if you are interested in customized training on Equipment Billing or the topic of your choice!

Work Order Text Options - Tricks to Using the Standard Procedure, by Scott Hollowell. We all know that WYSIWYG is supposed to mean "What you see is what you get", don't we? Well, I'll bet you've figured out by now that what you see is not, in fact, always what you get. This appears to be the case where Work Order instructions are involved, and especially so when you are moving from World to EnterpriseOne. Scott Hollowell shows us how to come closer to getting what we want to see.

Standing Work Orders – the Black Hole of your Maintenance Budget, by Scott Hollowell. This article brings to mind that "miscellaneous" folder in our filing cabinets. It was so convenient when it was established years ago, but now? Who knows what's even in there? Scott Hollowell has found the same thing happening with the use of Standing Work Orders and has taken the time to show us how we got there, how to get out of it, and more importantly – how to keep from getting there in the first place. This article contains some fine guidelines for effective use of Standing WOs without having them fall into that black hole.

Enterprise Asset Management v. Best of Breed - Making the Integrated Choice in the Face of Resistance, Scott Hollowell. Integration or interface: Which works better for you? In the September 2004 issue of JDEtips, Scott Hollowell gave us a rundown on the progression of the EAM module and gave us lots of grist for the product comparison mill. In this new article, he gives us some experience-based pointers for making the decision between implementing a pure PeopleSoft EnterpriseOne solution and interfacing a third-party equipment maintenance product with your EnterpriseOne environment. It's your decision, but this should help take away some of the pain.

The EAM Functionality Progression, Scott Hollowell, Asset Management Solutions, LLC. With all the name changes and product changes that result from the PeopleSoft® acquisition of JD Edwards®, sometimes we wish we had a road map to keep track of where we are. That's why JDEtips is continuing to feature articles aboutenhancements in EnterpriseOne 8.9. In this article, Scott Hollowell not only shows us where things are today, but gives us a rear-view-mirror picture of how we got here, then follows up with a snapshot of where we are going. In his usual concise style, Scott not only provides excellent perspective, but also hits the highlights of changes and enhancements in the Equipment Management modules.

Supplemental Data – The Equipment Manager's User-Defined Friend, Scott Hollowell, Asset Management Solutions, LLC. If you stare at the menu option for Supplemental Data on the Equipment Maintenance menu for a long time, it appears to move slightly, but that's all it does. Until you read this article! Scott explains all in his typical "waste no time – take no prisoners" style. After reading this, you'll be able to satisfy all those users with all their "where do we put this data?" needs.

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E1 W **Meter Readings De-Mystified, Scott Hollowell, Asset Management Solutions, LLC.** Scott Hollowell was inspired to write this article having observed perfectly knowledgeable and capable (and formerly sane) users pulling their hair out trying to get their meter readings to behave the way they wanted them to. Scott brings his usual clarity to bear on the terminology, work flow, and how to interpret the results. The editors will refrain from publishing Scott's reply to our inquiry regarding the Jeep! This article applies equally to both WorldSoftware™ and OneWorld®.

E1 W **Incorporating Maintenance Management with the Fixed Asset System, Scott Hollowell, Asset Management Solutions, LLC.** We're very pleased to welcome Scott to the ranks of JDEtips Associate Editors. We know it's been a while since we published an article on JDE's Maintenance modules. It was worth the wait! Scott is one of the absolute best independent consultants working in this area. Sit back, relax, and enjoy some of Scott's favorite tips aimed at preventing that dreaded bugaboo—reworking your setup if you go live with Fixed Assets prior to going live with Maintenance. Scott shows you how to do it right from the beginning!

E1 W **Enterprise Asset Management (Plant and Equipment) Issue, RMB, Inc.** Enterprise Asset Management is the new name for Plant and Equipment Maintenance. Learn how JDE combined the best of Service and Warranty Management and P&E to create this new approach. RMB's IGS (Intelligent Graphics Solution) is also featured.

E1 W **Use Master Routings With Service Order Entry, Joel Sandberg, RMB, Inc.** Which sounds easier? Setup a separate routing for every work order OR setup a master routing once that can be used for every work order? Read this tip to save time tracking labor involved in servicing your critical physical assets. From RMB, the world's JDE Maintenance experts.

E1 W **Save Time Accounting For Work Orders By Using Service Contract Functionality, Matt Miller, RMB, Inc.** Learn how to charge labor to different accounts based on the type of work being performed. Did you know that the Work Order Type field can be used to control the journal entries? Setting this up saves keying the G/L Class on every work order.

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Financials

E1 W **Mapping Old to New: Global Updates for Business Units/Accounts/Subsidiaries, by Lisa A. Walsh.** There is a science to successfully mapping a newly acquired business, with different reporting requirements, into the acquiring business JDE® environment. Lisa Walsh was recently tasked with this challenge and she's here to share what she found to be the most efficient way to complete this process using Global Updates. This article contains the steps you'll take, as well as the order in which you'll want to run your updates, the gotchas that Lisa encountered during her project, and her recommendations to avoid the same traps.

E1 W **Hidden Gems in JDE Financials and Distribution, by Cheryl Pierce and Andy Klee. (Webucation Event Recording)**. An in-depth review of JDE's financial integrity jobs, advanced tips in Procurement, Sales Order and Pricing, including "Hierarchical Category Codes".

E1 **Enforcing Hierarchical Category Codes, by Mike Wright**. From DeMartino to Klee to Wright—no, this isn't the next famous double play combination, but it does describe how this tip came to be. Andy Klee, our publisher, was looking for some "hidden gems" to share with JDE audiences, and called Bob DeMartino, one of our ace JDE® Financials consultants a few months ago. Bob mentioned Hierarchical Category Codes, and even though it could only be enforced via post-setup reporting, Andy took it and ran with it. All the way to Mike's inbox, and Mike (our favorite EnterpriseOne® developer), agreed to write up the concept and even developed the source code for enforcing the concept during setup.

E1 W **Creating Depreciation Projections, by Bob DeMartino.** A good budget analyst knows that all expenses need to be considered; and that includes depreciation expense. There happens to be a program in JDE (R12865) that will help you calculate your Depreciation Projections. This article takes us through the preparation, the depreciation computation, the projection calculation, and final steps to get the projections into your budget, and helps you understand the results.

E1 W **Budget Scenarios Using Indexed Computations and User-Defined Ledger Types, by Sarah Mills**. Budgets change year after year, but that doesn't mean you need to reinvent the wheel each time. Sarah Mills demonstrates how you can use standard functionality found in JDE Financials to roll amounts forward year after year and adjust according to the upcoming year's budget. In this article, she'll cover Ledger Types, Indexed Computations, and Allocations, then ties it all together with an example of a budget rolled forward with an increase.

E1 W **Making the Transition from U.S. GAAP to IFRS, by Anurag Barua.** Are you ready for IFRS? In August of this year, the Security and Exchange Commission set in motion a plan that will likely result in all public companies reporting in the International Financial Reporting Standards (IFRS) framework by the year 2016. Some may have to switch to IFRS by 2014. That may seem like it's quite a while away, but in truth, it's uncomfortably close. The scope of such a transition boggles the mind, but Anurag Barua has bravely stepped forward to help you begin your research and planning. While this is not a JDE®-centric article in nature, the information presented will provide you with a bit more background on a project that could possibly eclipse Y2K and Sox compliance initiatives in scope. So, take a couple deep breaths, prop up your feet, and read Anurag's dissertation… and remember, we're here to help. This article was originally published in the December 2008/January 2009 issue of our sister publication, SAPtips Journal, for which Anurag is a regular contributor. We felt that the overall material presented was relevant regardless of the ERP solution, and therefore adapted this article to meet the need of our JDEtips readers.

E1 **Accounts Receivable / Accounts Payable Manual Netting in EnterpriseOne® 8.12, by Bob DeMartino and Jan Stas.** Do you have any vendors who are also customers? Do you have both an A/R balance (they owe us), and an A/P balance (we owe them) with the same entity? Wouldn't it be nice if you could figure out who owes who and either collect or pay, but not have to do both? New features in E1 8.12 are explained by our ace financials expert, Bob DeMartino, along with Jan Stas.

JDEtips Document Library Summary, February 2013

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E1 **Distribution Net Change – Returned Materials Authorization, by Jane Perry.** If you send it out, there's always a chance, for whatever reason, it will come back. Now what do you do? Where do you store it? Is it for repair or scrap? How do you credit it? This can lead to a lot of work and errors. And, frankly, since we're in business to MAKE money, not deal with returns, this is a process you truly want to consider streamlining. Thankfully, the JD Edwards® Returned Material Authorization module makes managing this process a bit easier. In a preview for the upcoming JDEtips Mastery Level Workshop, Distribution Net Change, Jane Perry presents the ins and outs of the RMA module. If you find this information valuable, be sure to check out Jane and the class at JDEtips University in Dallas, Texas this March!

E1 W **JDE Integrity Reports Quick Reference, by Mark Zinck.** This is something JDEtips has wanted to do for a very long time; Mark Zinck simply dropped this in our lap one day recently. We think you will agree that the Integrity Reports Quick Reference he has created is one of the handiest documents you'll ever use. To say more would be simply guilding the proverbial lilly.

E1 W **Reconciling Fixed Assets, by Bob DeMartino.** In the world of SOx, integrity issues, especially with Fixed Assets, can certainly pose a serious problem. And there is not exactly an obvious auto-correct within this application. Fortunately, we have Bob DeMartino to thoroughly take us through the steps needed to research and correct any Fixed Assets integrity issues (and keep the auditors at bay!) **NOTE –** while this article was written using EnterpriseOne, the functionality is the same in World.

E1 W **Where Business Units Come From: Deriving the Business-Unit Segment on Distribution AAIs, by Susan Stooksberry.** Ah, the facts of life. . .of a business unit. It's time to listen up as Susan Stooksberry gives us the "talk" on how Business Units make their way into a Distribution AAI. (Are there birds and bees involved?)

E1 W **Consolidations, by Steve Kuemper** Consolidations are pretty much a fact of life in today's market, where mergers and buy-outs are the name of the game. This white paper explores two methods of consolidating financials through JD Edwards – both for smaller organizations and larger ones. Steve gives step-by-step instructions for both scenarios. Learn more about this and other GL functionality in the JDEtips General Ledger Workshop – this paper will give you a taste of the details included in this class. Go to www.JDEtips.com/WorkshopSchedule.asp to read more about it.

E1 W **Changing the Fiscal Date Pattern, by Lina Hadi.** Changing horses in the middle of the stream can be painful and dangerous. One of those situations is when a company needs to change its fiscal year; from calendar to fiscal or from fiscal to calendar. This could happen because of an acquisition (either direction!) or restructure. This article should serve as a guide to the steps and considerations when undertaking this switch.

E1 W **G/L Subledger Seeking Work Order Master: "Soft" Joins in World and EnterpriseOne, by Susan Stooksberry.** Many of our best JDE tips are the result of recently-experienced (or long-remembered) "opportunities" encountered by consultants at a client site. This one is no exception! If you have never met WorldWriter and desire an introduction, see Marty Burns' article "WorldWriter Basics," published in JDEtips in 2001. If you are a developer seeking a sophisticated treatise on file unions and joins, see David Johnson's article "Joining on a Union - An Incredible Development Tool for Sales Reporting" in the November 2003 issue of JDEtips. But if you are in between – you already know the basics of JDE report writers and are a super user or functional consultant - you may want to circle this article.

E1 **FASTR Conversion Tool - A Cautionary Tale, by Susan Stooksberry.** There's nothing like experience to teach us life's important lessons… such as when a short cut winds up being the longer route, or in this case, when a time-saving conversion tool might not save us so much time, after all. Susan Stooksberry has gone down the path and felt the pain of converting reports from World to EnterpriseOne® 's ERW using the FASTR conversion tool. Read this article and decide for yourself whether this converter will be a debit or a credit in your migration from World to EnterpriseOne.

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E1 Re-Opening GL Periods during the Month-End Close Process, By Lorin Schultz. Yes, you CAN be in two places at once, and first-time contributor Lorin Schultz proves it! Using the technique described in this article, you can set up one or more users in such a way that they can continue to make adjustments to a prior period while the rest of the team marches forward into the next. We wanted to be sure to get this article in our January issue of JDEtips so you can take advantage of this technique for your final close of the year. It's not as simple as us Utopians would like, but the concept is really rather simple when you come down to it, and now that you have these detailed steps, we think you'll find it just isn't all that hard to pull off. While the primary focus of this article is on EnterpriseOne®, we have also included some notes for World®.

E1 EnterpriseOne 8.9 / 8.10 Financials - What's New?, By Susan Stooksberry. In our continuing efforts to keep you up to date with the latest EnterpriseOne enhancments, we present here a solid review of the 8.9/8.10 changes for Financials. Susan Stooksberry picked the ones that she feels will have the most impact and/or will be the most interesting and exciting. If you skipped EnterpriseOne 8.9 to move directy to 8.10, don't worry. The neat stuff that came with 8.9 will still be there!

E1 1099 Processing, by Bob DeMartino. We felt we are close enough to the end of the calendar year that you are most likely starting to gear up for year-end processing. Consider this either a primer or a refresher course for deciding on your approach, getting your data prepared, tweaking your setup, and finally, gathering your data to ensure correct and proper reporting of this vital IRS requirement – the dreaded 1099 filing. This article reminds you of all the places you can shoot yourself in the foot and helps you avoid those traps and mistakes with both your data integrity and your legal position intact!

E1 Advanced Cost Accounting, by Susan Stooksberry. Ever wish you could **really** analyze your customer and product line profitability? Ever want to allocate indirect costs such as Admin and Marketing to customers, product lines, or sales marketing channels automatically, based on a driver that makes sense, such as number of lines on sales orders? Ever wish you could do this without putting an incredible amount of detail into your General Ledger? In her Advanced Cost Accounting article, Susan Stooksberry shows us how to attain both of these goals through existing JD Edwards® functionality. Not only that, but she shows us in a clear and very readable style, from setup through reporting and online views. If you are responsible for your company's profitability analysis, we dare you NOT to read this article!

E1 Uploading Budgets in JD Edwards, Randall Foust, Keyston Brothers. There is nothing like years of experience to uncover the hidden tricks that save untold hours of time. Here's a new one on us—Randall highlights one of the very few programs where you can cut and paste data directly into a OneWorld grid from Excel. For those of you in a budgeting frame of mind, we also just published another approach to uploading budgets by Susan Stooksberry.

E1 Budget Upload, Susan Stooksberry, Klee Associates. Susan's white paper takes a different approach from Randall Foust. OneWorld has an input-capable form that enables the accounting department to import free-form budgets from a spreadsheet directly into OneWorld – without help from the IT department and without the limitations of the Budgets by Business Unit workaround (see Randall Foust's related article).

E1 W As of Reporting in Accounts Receivable and Accounts Payable, Randall Foust, CD Group. Randall scores again with another excellent article that applies equally to WorldSoftware™ and OneWorld®. (We're not sure about PeopleSoft!) The reasons for needing an "As Of" report are explained along with how to do it. So, stop tearing out what's left of your hair when the auditors show up, and read this tip instead!

E1 Using Excel to Create Journal Entries, Dan Marsh, The Dan Marsh Group. Dan's "Back to Basics" article is one that might save you many hours of work. Take advantage of existing Excel skills in your organization to speed data entry in OneWorld. This is just one example of how Excel can be used in conjunction with JDE.

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E1 W **OneWorld and World Financial Integrity Reports, Brenda Wycoff.** Anyone using General Ledger, Accounts Receivable, or Accounts Payable should read this tip from Brenda. Besides a good overview of what the integrity reports do, Brenda offers up solid advanced tips based on her years of consulting with JDE clients.

E1 W **Preventing and Identifying Integrity Issues and Posting Errors, Roger Wilkinson, Integrated Support & Consulting.** Roger's expertise is in multi-national financial implementations. These four tips add up to a wealth of time saving ideas. Plus you won't damage your forehead as much from banging your head against the wall when the integrity reports don't tell you what you need to know. This white paper should be required reading if you are one of the people that is supposed to know that debits go on the side nearest the window.

E1 W **Reporting Pre-Allocation Account Balances After Allocations, Krista Thompson, MSS Technologies.** There are legitimate financial reasons to need to see pre-allocation account balances, even after allocations have been run. Learn how to do this in both WorldSoftware and OneWorld.

E1 W **Manufacturing Accounting Issue of JDEtips, Roy Peters, CFPIM, Klee Associates.** 10 pages that follow an example all the way through the manufacturing process to the General Ledger. If you aren't using this module, then you can't explain your variances, and you are missing a great deal of useful information.

E1 W **Back to Basics with AAIs, Blanca Villasenor, SBI.** Learn the basics of how JDE's software finds the AAI to use. If you don't know how the Subsequent Business Unit field in the Business Unit Master is used, you might be surprised.

E1 W **Year End Financial Close, Blanca Villasenor, SBI.** Blanca is a regular contributor to the Financials department of the JDEtips Newsletter. In this White Paper, Blanca presents a handy, easy to follow, checklist of Year End Closing steps.

E1 W **Corporate Treasury Management, by Richard Berry.** Are you wondering whether your Finance team should consider acquiring third-party treasury software? And if not, what is the alternative within PeopleSoft EnterpriseOne and World to satisfy your day-to-day treasury requirements? Richard Berry has experienced this question from both angles – with and without specialized software. In this article, he presents an analysis of 14 areas of treasury operations and for each area, points out where existing software can be leveraged as a treasury management tool.

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Financials – Accounts Payable

E1 W **JDEtips Training Manual Sample: Overview of Procure to Pay, by Bob DeMartino.** Get a quick overview of Procure to Pay with a chapter from our Accounts Payable Training Manual. Note: You can purchase the entire Accounts Payable Training manual now as well.

E1 W **Using Bank Reconciliation to Reconcile Other Types of Accounts, by Susan Stooksberry**. In a previous article, Susan Stooksberry demonstrated how to reconcile the Received Not Vouchered account using Excel Macros. In this article, she presents another option for reconciling this account, as well as other types of accounts, using the JDE® Bank Account Reconciliation process. Focusing on the RNV account, and using the JDE Manual Account Reconciliation program, Susan steps us through this process, including options for reconciling vs. unreconciling, and using this in combination with Excel Macros.

E1 W **Using Excel Macros to Reconcile the Received-Not-Vouchered Liability Account, by Susan Stooksberry**. Looking for a simpler way to reconcile your received-not-vouchered liability account? If you're familiar with Excel and standard JDE® Account Reconciliation, we have a solution for you. Susan Stooksberry demonstrates how Excel macros can be used to determine which General Ledger transactions are resulting in open balances. Added bonus: She's included an Excel spreadsheet that includes the macros discussed in the article so you can get started right away.

W **Creating Intercompany Settlements Invoices and Vouchers in World® A9.1, by Bob DeMartino.** When it comes to Intercompany Settlements, a simple journal entry might keep the companies in balance, but it's not going to make your auditors too happy—especially if these companies are considered legal entities and an "arm's length" transaction has occurred. Bob DeMartino demonstrates how to take Intercompany Settlements to the next level and automatically create invoices and vouchers, so that your audit trail has a happy ending.

E1 W **Received Not Vouchered: Discover Hidden Incremental Profits, by Nadine Alexander.** It's not somewhere that you would necessarily think to look, but there are most likely some hidden, incremental profits in your balance sheet that could result in anything from a few extra dollars to millions in "found" money. The key here is to understand what's in the Received Not Vouchered General Ledger account. Nadine Alexander demonstrates her "treasure hunting" techniques for bringing to light those hidden dollars; the end results could ultimately make a difference in your bottom line. This article is based on Nadine's Collaborate 08 presentation.

E1 **Expense Management: An Overview, by Dipesh Mandalia.** Whether it's traveling to a meeting, dinner with a client, or home office expenses, every company has to account for a certain amount of employee expenditure—which equals the dreaded "expense report". It's a time-consuming process if done manually. Of course, the Expense Management module in JD Edwards can make it so much more efficient—and by that we mean automated. If you haven't discovered this functionality, let Dipesh Mandalia take you on a tour.

W **A Technical Approach to Implementing A/P Wire Transfers For World, by Paul Hanson.** Save money by changing the way you spend it. This article describes the process for working with your bank to complete automated payments so you don't have to spend your time (and money) printing paper checks and mailing them. This article should help you get on your way along the road to that Utopian paperless society we hear so much about. For EnterpriseOne® users, please refer to "A Technical Approach to Implementing A/P Wire Transfers", in the Accounts Payable Category of the JDEtips Document Library.

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E1 W **Special Voucher Matching Processes, by Bob Demartino.** This white paper is a sample chapter of the JDEtips Mastery Level Accounts Payable Workshop, to be introduced in March 2006. Please see www.jdetips.com/WorkshopCatalog.asp for a full listing of the JDEtips Workshops and an outline of this outstanding Mastery Level course.

E1 W **Voucher Logging with Multiple Voucher Types, by Jan Stas.** The who, what, why, when, and where of Voucher Logging. This article presents a complex business scenario with multiple business branches where each branch needed its own set of voucher numbers. Even in a less complex business environment, this article can be a great handbook to walk you through your decision of whether to use Voucher Logging and then how to get it going. Jan shows us how to set up and implement this solution without any modifications to the system. And you don't need to be a "techie" to understand it!

E1 **Closing the Gap with a Bank Reconciliation Interface, By Paul Hanson.** In prior issues of JDEtips, Paul Hanson has written about the Positive Pay Interface and A/P Wire Transfer Interface. This gets the bills paid in the first place. Now, he wraps up this thread by showing us how to bring the data back in from the bank for an automated check reconciliation. It doesn't take that much tweaking once you get straight with the bank and get the ball rolling. You can use the JDEtips Document Library Search Engine to locate "Developing a Positive Pay Interface" and "A Technical Approach to Implementing A/P Wire Transfers".

E1 **A Technical Approach to Implementing A/P Wire Transfers, By Paul Hanson.** Save money by changing the way you spend it. This article describes the process for working with your bank to complete automated payments so you don't have to spend your time (and money) printing paper checks and mailing them. The features described here are built in to your EnterpriseOne® software, but there are still some chores you have to do to make it work for you.

E1 W **Electronic Funds Transfers in A/P: A Voyage of Discovery, by Rita Nygren.** Ever had to solve a problem by pulling together various resources such as articles on the Knowledge Garden, answers from JDEList, and some old fashioned detective work? Sure you have! Well, here's one less problem to solve from scratch. Rita Nygren's article on EFT processing in Accounts Payable should help you setup automatic payments to your vendors. If you are about to embark on an EFT project, this article will save you time, money, and probably a few headaches as well.

E1 W **Reconciling the Received Not Vouchered Account, Richard Berry, Klee Associates, Inc.** Is it Financials, or is it Procurement? All we know is that everyone struggles with reconciling the RNV account to the Open Receipts file. Many of you are already dancing the dance of the unreconciled. Richard tells you everything he knows about how to locate these differences and what to do about them. Go forth and reconcile!

E1 W **Procurement to G/L Integrity - Received Not Vouchered As Of Report, Roger Avrit, Avrit Consulting Group.** Another winner from one of our favorite contributors, Roger Avrit. We feel your pain when it comes to reconciling the G/L and the Procurement Receipt details. Learn to write a custom report to solve this integrity issue - OneWorld code available.

E1 W **Procedure For Clearing and Reconciling Received Not Vouchered, Richard Berry, Klee Associates, Inc.** One of the most difficult reconciliation processes for JDE clients is to reconcile open purchase orders to the received not vouchered account. As you probably know, these should balance, but often don't. Many customers struggle with this issue. In this article, we present some great tips on how to figure out where the discrepancy comes from. A nice complement to Richard Berry's lengthy treatise on this subject.

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E1 W **Eliminate Potential Duplicate Payments in Accounts Payable, Roger Avrit, Avrit Consulting Group.**
Sometimes you pay an invoice more than once, right? Do you always catch it in time? Sometimes you read something and think, "Wow, that is a great idea!" We think you'll be "wowed" by the simple excellence of this White Paper. OneWorld source code is available for this tip. This tip alone could be worth many thousands of dollars to your bottom line.

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Financials – Accounts Receivable

E1 **Accounts Receivable Deduction Management, by Susan Stooksberry.** Short pays becoming a way of life for your Accounts Receivable team? You're not alone… it's a growing problem and one that can be managed in EnterpriseOne® with the help of Accounts Receivable Deduction Management. Susan Stooksberry demonstrates how you can use this functionality to better manage those partially-paid invoices. In this article, you'll find an overview of this solution, examples of when you'll want to use it, and the setup steps to put it to work with your A/R application.

W **Creating Intercompany Settlements Invoices and Vouchers in World® A9.1, by Bob DeMartino.** When it comes to Intercompany Settlements, a simple journal entry might keep the companies in balance, but it's not going to make your auditors too happy—especially if these companies are considered legal entities and an "arm's length" transaction has occurred. Bob DeMartino demonstrates how to take Intercompany Settlements to the next level and automatically create invoices and vouchers, so that your audit trail has a happy ending.

E1 W **Order to Cash Overview, by Julie McNight.** You're in the A/R department at your company, and you see Invoices coming over from the Sales Order system. You'd like to know more about how Sales generates Invoices, and the interface between A/R and Sales, but you can't spare a few days to attend a Sales Order class. What do you do? How about reading this white paper (written in "training manual" style)? Then you'll be ready to amaze your co-workers, and perhaps even explain A/R to the Sales Order folks. (This paper was written for JDEtips by Julie McKnight).

E1 W **Automated Cash Receipts Setup and Processing, by Bob DeMartino.** You ship 'em, you bill 'em, they pay 'em (hopefully). That's the cycle of commerce. Where it gets to be "fun" is when you have multiple receipts coming to pay multiple invoices per customer. Can anyone say "match game?" Bob DeMartino, our Financials Expert, can help you make ease of this task—he takes us step by step through the setup and processing of Automated Cash Receipts so that JD Edwards (and not you) can match the correct payment to the invoice and keep your customer records accurate!

E1 **A/R Statement Processing with Added Flexibility, by Jeanne Robbins.** We used to take for granted those detailed monthly statements highlighting our account history, payment plans, etc. Not any more. It's no longer as easy as filling the paper bin in the printer and hitting the print button. With all the options offered by EnterpriseOne®, there's a science to setting up and processing statements. Jeanne Robbins takes us through the various options and setup procedures so that statements sail out the door, with at least a little more ease.

E1 W **Integrated AR Purge, by Jeanne Robbins.** Phantom Receipts. Nobody wants them. Everybody's got them. But guess what? You really don't have to live like that. At least not if your phantoms are the result of purges gone awry. This article explains how these can come into existence, then gives us some great pointers to modify your purge programs to nip this problem in the bud.

E1 W **SOM Sales Order Management-Based Profitability Analysis: Creating Credit Orders without Impacting Inventory, by Susan Stooksberry.** Almost everyone knows how to create Credit Memos from History. (If you don't know—email us and we'll send you an excerpt from our own Sales Order Management training manual.) But there are legitimate reasons to create Credits manually, particularly when a Credit does not apply to a particular Sales Order. Susan explains why those should be done in the Sales Order system (as opposed to entering directly into A/R), and gives detailed, step-by-step instructions as to how to do the setup and entry of these orders.

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E1 W **Automatic Cash Application, By Roger Avrit with Bob Demartino.** The order to cash process can generate large volumes of invoices—at least we all hope so! That in turn requires a fast, efficient method of applying receipts of cash to open invoices. This requires some method of collecting and depositing cash receipts in a central location and importing that information into the A/R system. This article explains how to do auto-cash application with and without lockbox processing. You can learn more about these processes and many others in detail by signing up for the JDEtips Mastery Level Accounts Receivable Workshop. Find out more at:
http://www.jdetips.com/WorkshopDescriptionsAccountsReceivable.asp

E1 W **A/R to Account Balance by Account ID Integrity R03B707, By Sharon Steiner.** It's one thing to know how to fire off an integrity report – it is another matter entirely to understand how to get the report to give you what you really need. In this case, "Where do I have an integrity problem, and how do I chase down its source?" Sharon Steiner shows us step by step how to set your processing options, then how to follow the report results back to the source.

E1 **Improving Productivity by Streamlining The Form Tab Sequence, Susan Stooksberry, CPA, CIA, CISA, Klee Associates.** Talk about a useful tip! Susan shows you how, with a few minutes of effort, you can make data entry easier for often used programs like Invoice Entry. Taking this tip to the next level, you'll see that you can apply this to any OneWorld® data entry form. Just be aware that any changes will need to be documented and applied again after future ESUs are applied.

E1 W **Comparing OneWorld and World Accounts Receivable, Brenda Wycoff.** If you are contemplating a move from WorldSoftware to OneWorld, undoubtedly you've heard that the Accounts Receivable module has been seriously rewritten. Get a jump on the implementation by finding out all the major differences here. Brenda does a great job with this 11 page overview.

E1 W **Advanced Payment Terms, Dan Marsh, Dan Marsh Group.** Learn how to do terms like 4% 30, 3% 60 Net 61, or Prox Days with a Discount. It's easy, with this relatively new piece of functionality! Available in both OneWorld Xe and WorldSoftware A8.1.

E1 **A/R Interest In OneWorld, Richard Berry, Klee Associates.** In his quest to serve clients better, Richard Berry has investigated the relatively new Delinquency Fees module in OneWorld. Find out everything you need to know to get started using this new functionality, including a page of test results. Once again, save valuable time with JDEtips.

E1 **EnterpriseOne Accounts Receivable Manual Receipts – Write-offs and Reason Codes, Susan Stooksberry, Klee Associates**. Susan Stooksberry presents an outstanding review of the ins and outs of managing overpayments and underpayments in Accounts Receivable. This is a must-read if you are currently spending too much time and effort either chasing after or manually writing off minor amounts owed.

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Financials – Fixed Assets

E1 W **Creating Depreciation Projections, by Bob DeMartino.** A good budget analyst knows that all expenses need to be considered; and that includes depreciation expense. There happens to be a program in JDE (R12865) that will help you calculate your Depreciation Projections. This article takes us through the preparation, the depreciation computation, the projection calculation, and final steps to get the projections into your budget, and helps you understand the results.

E1 **Interoperability Lite: Importing Fixed Assets from Excel, by Betty Townsend and Susan Stooksberry.** Fixed Assets interoperability in EnterpriseOne works well, provided you have fat client access and lots of IT support. But even if you do, it's easier to use Excel to import fixed assets into JDE, according to Susan Stooksberry and Betty Townsend. As a bonus, they've also included an Excel spreadsheet template; you can download this zip-file separately: Interoperability Lite: Importing Fixed Assets from Excel.zip.

E1 W **Top Ten Tips for Fixed Assets, Randall Foust, CD Group.** Randall specializes in Job Cost and Fixed Assets along with core Financials. If you are implementing Fixed Assets, or even just wondering if you did it the best possible way, this document is an invaluable tool. Every tip applies equally to WorldSoftware and OneWorld. Ten tips for the price of one!

E1 W **Fixed Asset Additions, by Richard Berry.** Richard gives us the benefit of his many years of consulting experience by covering the Fixed Asset acquisition process from Purchase Order through Accounts Payable and General Ledger and finally into the Fixed Asset module. Along the way he covers Asset Master Information, Adjustments to Asset Costs, Automatic Asset Master creation, and tips, common problems, and Frequently Asked Questions.

E1 **How to Correct Fixed Assets Integrity Errors, by Bob DeMartino.** Chasing down Fixed Assets integrity issues takes a two-sided approach. There are two reports involved – Fixed Assets to G/L, and G/L to Fixed Assets. Running both of these reports will give you the whole picture. This article will walk you through the process of running these reports and show you what to look for on them.

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Financials – General Ledger

E1 W **JDEtips Training Manual Sample: Indexed Allocations, by Steve Kuemper**. Get a quick primer on Indexed Allocations with a chapter from our General Ledger Training Manual. **Note:** You can purchase the entire General Ledger Training manual now as well.

E1 **Budget Forecast Setup and Processing in EnterpriseOne Versions 8.10 and Up, by Bob DeMartino.** You asked, and Bob delivered. We recently received feedback about the need for more content on Budgeting in the JDEtips General Ledger class. Bob DeMartino takes us on a tour of the new budget forecasting feature available in EnterpriseOne Versions 8.10 and higher, including the setup, steps to generate a forecast, and its application to the Budget Ledger. Along the way, he'll discuss how to create "what if" scenarios using different revision numbers, and much more to help you get a better grasp on the big budget picture.

E1 W **Discerning G/L Dates within Unposted Batches, by Susan Stooksberry.** The JDE standard reports are a powerful tool. But sometimes you need just that one thing extra – something to ensure your integrity and help reflect your reality. One example is the standard unposted batches report, which shows the batch date, but not the GL date of the transactions. What to do? Susan Stooksberry once again comes to our rescue with a full description of the problem – and why it's a problem – along with the full solution. Look for some great "tips" along the way.

E1 W **Reconciling Vertex Register with the General Ledger, by Morley Fulgencio.** We've waited five years for someone to come along and explain Vertex to our audience. This is an excellent introduction to using Vertex with JD Edwards Sales Order Management. Going beyond the setup and execution, Morley also explains how to use Flex Accounting to easily reconcile the Vertex generated amounts—before those all-important state tax filings.

E1 W **Changing a Year End for a Company: Implications for General Ledger and Fixed Assets, Randall Foust, CD Group.** We asked Randall to write an article on this topic because questions on changing fiscal date patterns often come up in various user forums. This is definitely not a simple subject, and one that is a perfect topic for a JDEtips article. Randall's expertise and his ability to simplify a complex issue shines through. Consider this required (and beneficial) reading if you are contemplating changing your fiscal date pattern. Randall highlights reposting issues that can result from changing fiscal years.

E1 W **Understanding and Using Subledger Accounting, Hartley Farmer, Westbrook Systems.** Subledgers are one of the JDE Financial Suite's best kept secrets. Used well, they can add whole new dimensions to your reporting and perhaps even defer the need to implement Job Cost, Contract/Service Billing, or Activity Based Costing. Hartley draws upon his 20 years of JDE experience to give you rock-solid advice on Subledgers.

E1 W **Getting More Value From Miscellaneous Subledger Entries, Roger Avrit, Avrit Consulting Group.** JDE's powerful subledger capability is made even more powerful by implementing the concept explained in this White Paper. Another simple, but beautiful idea, ably explained by Roger Avrit.

E1 W **Designing, Implementing and Maintaining a Chart of Accounts, Roger Avrit, Avrit Consulting Group.** The Chart of Accounts is crucial to the efficient and effective capture and display of your organization's financial information. If the Chart of Accounts is set up correctly, your online inquiry and reporting tools will give you the information you need to understand what is happening in your business. Roger Avrit does an admirable job conveying a wealth of tips and knowledge, gained from nearly 25 years of working with financial systems. As an added bonus, Roger's sample Chart of Accounts is included. This white paper applies to both WorldSoftware and OneWorld.

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Financials – Job Cost

E1 **Change Management and Job Cost Budgets, by Bob DeMartino.** We all know that any project is subject to changes throughout its lifecycle. And those changes need to be made, approved, and tracked so that they provide a detailed audit trail. Fortunately, we have people, like Bob DeMartino, who can provide us with an approach to track such changes using the Change Management module. Bob steps us through what this module is capable of and how it can be applied to Job Cost budgets, including a sample scenario to illustrate the effectiveness of this approach.

E1 W **Project Reporting – Job Cost vs. Work Orders & Subledgers: What To Consider, by Hartley Farmer.** Job Cost vs. Work Orders? Which of these methods is most likely to meet your project's reporting needs? To help you sort out the best solution, Hartley Farmer provides an overview of both methods, then lists the decision points you'll need to consider before you select. So whether your project is very large or very small, this article will help you determine which is right for you.

E1 W **Profit Recognition with Costs Charged Directly to Profit and Loss Account, by Richard Berry.** When Richard Berry first wrote about Profit Recognition, he gave us a detailed view from the "normal" setup, which included charging project costs to the Balance Sheet. But for some users—"normal" just wasn't going to cut it; they needed a way to charge directly to the Income Statement. So, Richard's back, this time to compare both methods, and the when and where you'll want to use the "alternative" method.

E1 W **Job Cost Projections, By Richard Berry.** The Job Cost module generates projections automatically and dynamically. Projections are required for profit recognition; actual amounts are compared with projections to compute percent complete at the detail Job chart line and also for the Job as a whole. But projections can also be used as valuable management information. They enable managers to see the projected outcome of a project without having to do complicated manual calculations. There are 17 methods of projection computation, but few users get beyond method 'D' (the default method). There are some methods which are very useful. Method Q (Quantities), method R (Remaining Unit Rate) and the S and I combination of methods are particularly useful. In this article, Richard explains in detail, using practical examples and illustrations, how the various methods of computation work and the situations in which they might be used.

E1 W **Job Cost: Profit Recognition, By Richard Berry.** Continuing his series on Job Costing, Richard tackles the subject of Profit Recognition. The subject is broken down into sections covering accounting principles and legal requirements, the concepts that lie behind the PeopleSoft approach (whether you like their approach or not), the setup required, and the month-end profit recognition process.

E1 W **Job Cost: Chart of Accounts Design, By Richard Berry.** Although this subject may seem basic, it is one of those areas where many Job Cost users struggle. The concept of chart of accounts design may seem straightforward at first sight, but the PeopleSoft Job Cost module is capable of great sophistication. The Job Chart is the heart of the system and it is critical to get it right. In this white paper, Richard describes how the chart is supposed to work and he gives some examples. There are many acceptable alternatives, but he main objective is to design a chart that will quickly display critical cost management information and be sufficiently succinct. Richard is able to draw from many years of experience working with construction and engineering companies that use The PeopleSoft World and EnterpriseOne Job Cost solution.

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E1 W **Engineering Bill of Materials, By Richard L. Berry.** In the first installment of Richard Berry's series on Project Costing, he gave us a broad conceptual overview of the process and analyzed where and how PeopleSoft EnterpriseOne addresses Project Costing needs. In this second installment, he begins with the details of some of the functionality. He explores the ins and outs and details of using the Project Costing module for creating Engineering Bills of Material – without implementing the entire Manufacturing suite.

E1 W **Introduction to Project Costing, by Richard L. Berry.** Well, we must admit that we didn't really plan it this way, but this may turn out to be the first in a series of articles by Richard Berry that we would strongly recommend you hang on to. See, Richard got started writing and we just simply had to cut him off – so that's why it will wind up being a series. By the time we're done, we think Richard will have pretty much covered the territory. In this article, you will learn about more than just the software. The approach is to present the concepts and business requirements surrounding Job Costing, then to explain how these are addressed by PeopleSoft EnterpriseOne. Whether you already use Job Costing or are just now considering its implementation, be sure that you will learn plenty from this installment.

E1 W **Top Ten Tips For Job Cost, Randall Foust, CD Group.** What can you say about a consultant who is willing to share his Top 10? Thank you, Randall! Reading this will undoubtedly save clients a great deal of aggravation later. Do it right the first time.

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Financials – Multi Currency

E1 **How to Re-Scale a Foreign Currency and Get Away with It, by Tim Ene.** At JDEtips, we love a good can-do story. It's always great to hear about a problem solved by ingenuity, by a team that stepped outside the box and decided to "Think JDE®". This case study, shared by Tim Ene, is one of those stories. Tim describes how he and his team solved a real "pickle" of a problem for a multi-national company faced with trying to convert years of peso transactions after Mexico revalued their currency and changed the definition from a whole unit calculation to a two-decimal system. Their unique approach offers learning lessons for any company faced with a similar scenario in a global economy.

E1 W **Automatic Inter-company Revaluation/Elimination, Courtesy of "Post Balances by Currency", by Susan Stooksberry.** Ah—the joy of multi-currency (said tongue-in-check). Can there be an easier way to balance inter-company accounts? How about restating and revaluing them in a common currency for elimination? Susan Stooksberry offers up a GREAT workaround using "Post Balances by Currency" that takes some of the "fun" out of balancing inter-company accounts.

E1 W **Account Reconciliation from the CA Ledger, by Susan Stooksberry.** We have a holiday treat for you! Susan Stooksberry has a reconciliation tip she's pulled out of Santa's bag, just in time for end of year accounting "fun" (we use that term loosely). If you're a company dealing with multicurrency, and wish to view the transactions in the payment currency rather than base currency when reconciling a monetary account, this must read tip is as sweet as the icing on a gingerbread house! Enjoy!

E1 W **Do You Want Receipt Routing with that Third Currency? By Susan Stooksberry.** If you use the JDEtips Document Library search engine and enter "Receipt Routing" as your key word, you'll find that we've covered both the basics and the advanced aspects of this subject. But here's something we'll bet nobody anywhere has written about before! Susan Stooksberry has educated our readers in the past about the intricacies of multi-currency, but this time she's outdone herself. She takes us through the process of adding a third currency to an existing receipt routing scenario.

E1 W **Activating Multicurrency After Go-Live: Overview, by Susan Stooksberry.** Are you starting to see a trend, here? Yes, folks, Susan Stooksberry is on a roll, and she won't stop until she has made it perfectly clear to us that moving to multicurrency is not a thing to be taken lightly. In this article, she gives us the background to plan ahead before taking this "fork in the road", as she puts it. Lots to think about, and Susan gets us started here, then fills in the blanks in her detailed article, Activating Multicurrency After Go-Live: Details, which is available in the JDEtips Document Library**.**

E1 W **Activating Multicurrency After Go-Live: Details, by Susan Stooksberry.** This in-depth article goes into the details of implementing multicurrency after you have already gone live without multicurrency turned on. When you change your mind – or your business practices – so do the rules for implementation. Susan leaves no stone unturned in this step-by-step instructional piece, and provides valuable tips and gotchas along the way.

E1 W **Restating Budget Balances into Another Currency, by Richard Berry.** The uncommon denominator! Richard Berry explains why and how a company doing business in multiple currencies may want to restate their budget as well as their actuals into another currency. This offers step-by-step instructions with tips along the way and shows you how to interpret the results.

E1 W **Turning Off Multi-Currency, by Susan Stooksberry.** We all "know" that everyone should just turn on multi-currency and leave it on, even if you do not have any international customers or vendors now. Right? Well, not so fast! Susan has found valid reasons why it should never have been turned on. But her client has already turned in on and now, needs it turned off. Easy? No! Doable? Yes – with the advice in this excellent article.

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E1 W **Changing Your Domestic Currency (Euro Conversion), Steve Shipp, TDG.** This White Paper emphasizes conversion to the Euro, but it can be used by any client needing to change its domestic currency. Screen shots are done with WorldSoftware, but the concepts apply equally to OneWorld.

E1 W **Alternate (Dual) Currency, Richard Berry, Klee Associates.** Many international companies require their subsidiaries to report to headquarters in a different currency than their domestic currency. Learn the ins and outs of Alternate Currency processing with this White Paper by our Singapore based consultant.

E1 W **Multi-Currency Without Multi-Currency, Dick Satchell, MSS Technologies.** If you don't operate in multiple countries, you probably need to see your financials in one currency. If you don't want to get into full-fledged dual currency, consider using this creative alternative. It might be the solution you've been looking for.

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Financial Report Writers

E1 W **G/L Subledger Seeking Work Order Master: "Soft" Joins in World and EnterpriseOne, by Susan Stooksberry.** Many of our best JDE tips are the result of recently-experienced (or long-remembered) "opportunities" encountered by consultants at a client site. This one is no exception! If you have never met WorldWriter and desire an introduction, see Marty Burns' article "WorldWriter Basics," published in JDEtips in 2001. If you are a developer seeking a sophisticated treatise on file unions and joins, see David Johnson's article "Joining on a Union - An Incredible Development Tool for Sales Reporting" in the November 2003 issue of JDEtips. But if you are in between – you already know the basics of JDE report writers and are a super user or functional consultant - you may want to circle this article.

E1 **Soft Coding Smart Field Column Headings, Dan Marsh, The Dan Marsh Group**. Another winner from Doctor Dan, the Financials Man! This is a great tip—it will save you a lot of time changing Financial Report column headings, especially when the year changes, and you want your reports to reflect the current year in the title. In the true JDEtips style, Dan takes you through every step in detail. One of our most popular and useful Financials tips, ever!

E1 **Tips on OneWorld Financial Reporting, Randall Foust, CD Group.** Benefit from this author's eight years experience writing Financial Reports with JDE's software. Read these before you sweat the details on your critical reports.

E1 **Complex Allocations - A Solution With OneWorld Report Writer, Krista Thompson, MSS Technologies.** Krista is an expert at both Allocations and the ERW. In this White Paper she explains how she goes beyond the boundaries of the JDE Variable Numerator (which allows ratios based on Business Unit Category Codes) to a much more flexible calculation.

W **Improving FASTR Performance, Colin Hugill.** Want your FASTRs to run FASTER? Read this White Paper!

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Financials – Time Entry

E1 W **Time Entry with Equipment, by Richard Berry, Klee Associates.** In this article, Richard follows up his previous article on Standalone Employee Time Entry (available in the JDEtips Document Library as of May 2004) with another article that fills in with more detail on time entry with equipment. An employee may spend time on a job using one or more pieces of the company's equipment, perhaps for testing, repair, or construction purposes. The time entry module allows both the employee's own time and the equipment time to be entered using the same screen.

E1 W **Standalone Time Entry, by Richard Berry, Klee Associates.** Many customers might use this module if they knew they had it. There was a time when JDE used to deliver Standalone Time Entry along with the project management suite. Many clients actually have the software but do not realize it. If they know they have it, it may not be very clear what the module is actually supposed to do and how it can help them. Others know that they have it but are at a loss as to how to actually implement it or they have simply put it to one side because they believe they need to set up the whole Human Resources system in order to make it work. Richard Berry takes the mystery out of this useful tool and shows you how to put it to work in your environment.

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High Availability

E1 **iSeriesTips for EnterpriseOne, By Mike Wright, Werner Co.** It's not a big secret that those of us who run an iSeries absolutely love it. It does many things automatically that need constant attention on other platforms. However, using it as an enterprise server for EnterpriseOne poses some uniqueness that isn't typically found with other software applications. Mike Wright has shown us how to diagnose and treat some of the more common problems with EnterpriseOne on an iSeries server.

E1 W **HIGH AVAILABILITY – An Introduction to iSeries High Availability, by iTera, Inc.** Everyone's backup and recovery strategy should include a serious consideration of high availability technology. Various alternatives are explored in this excellent white paper, provided by the experts at iTera, Inc.

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HR and Payroll

E1 W **Reducing Payroll Errors, by Buffy Dorpinghaus.** You know them when you see them: those pesky payroll errors that crop up each time payroll is run. Wouldn't it be nice to track and correct those errors before they impact your employees' checks? Since payroll errors are client-specific, there is no one-size-fits-all error prevention solution for JD Edwards®. But there are ways to minimize payroll errors, as Buffy Dorpinghaus demonstrates. Buffy developed a solution for one of her clients, using a combination of standard and custom reports and institutional knowledge. She documented the process she used, examples of the errors they needed to find, and her best practices—all of which led to a 47% reduction in payroll errors for this client.

E1 **Troubleshooting Payroll Journals, by Thomas Nellissery.** Payroll Journal errors give new meaning to the term "pay it forward". If there's an error in the Pro-Forma journal form, it's likely that it will remain there, all the way to the GL batch, especially if there isn't time to locate and fix the error before the final update. Thomas Nellissery understands the pain. That's why he's sharing some of his favorite tips for troubleshooting common Payroll journal errors and resolving them quickly.

E1 W **Benefit Plans and Options: Recalculating Rates Using Batch Enrollment, by Sarah Mills.** Does open enrollment = open insanity for your HR team? Then it's time to simplify your benefits plan rate maintenance. This tip from Sarah Mills shows how to do so using Plan Master Rates. Sarah covers the basic setup of P083203: Plan Master to set date effective rates, how to use R083800: Batch Enrollment to update the rates on all employees, and finally a review to see the effects within the Employee DBA Instructions.

E1 **Timecard Automation: Part II, Advanced Overtime Rules, by Marta DiDomenico.** Gotta gig that involves a complex set of overtime rules in JD Edwards® EnterpriseOne®? In Part II of her series on Timecard Automation, Marta DiDomenico expands on what we learned in Part I and steps us through the setup of functions, formulas and calculations for those situations in which the overtime rules get a little more complicated. She also demonstrates how to calculate weighted average hourly rates for employees who work at different hourly rates. If getting your overtime pay in order has you working mucho overtime yourself, this tip will help you pick up the beat in no time.

E1 **Competencies Module Overview, by Claire Hensler**. JD Edwards® Competencies module is a great tool for defining job skills requirements and tracking employee performance against those skills. You can easily get carried away with the setup, though, and make life harder for yourself than it needs to be. So it's good to understand how the job definitions, groupings, and competencies work together. This article by Claire Hensler makes for an excellent guide to planning your overall design. Claire provides a detailed overview of the modules; along the way, she shares her tips for keeping the functionality from becoming too complex.

E1 **Timecard Automation – Setup for Retroactive Pay and Overtime Rules, by Marta DiDomenico.** An automatic way to calculate retroactive pay and overtime pay? Could we be dreaming? Go ahead—pinch us. Marta DiDomenico demonstrates the setup for Retroactive Pay and Overtime Rules using JD Edwards® Timecard Automation functionality. Included in this article is a discussion of timecard templates and how they can be used to simplify this process. So stop dreaming about the day when manual calculations of retro-pay, bonus pay, holiday pay, and overtime would be a thing of the past and put an easier future in motion today.

E1 **AAIs for Payroll Burden, by Claire Hensler.** Are Payroll Burdens AAIs starting to burden you? Claire Hensler understands, which is why she's here to discuss how costing for Burden journals is determined in JD Edwards® EnterpriseOne®. Claire presents key information on the setups needed to minimize the costing errors and journal entry errors that often are ignored in your payroll department's efforts to get pay out on time, including: Labor AAIs, Burden AAIs, PDBAs, Hierarchy Models, One Time Overrides, and more.

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E1 **Benefits Enrollment Conversion Using Employee Self Service, by Marta DiDomenico.** Does the thought of a Benefit Enrollment conversion in JD Edwards® EnterpriseOne® turn your stomach into knots? Fear not, says Marta DiDomenico. By using parts of the Employee Self Service functionality (you don't even need the full ESS setup), you have a much easier—and more accurate—option for converting employees from one benefit package to another. Whether you're on Xe or Versions 8.10 and higher, Marta's got your setup covered in this article.

E1 **Pay Cycle Workbench: Voiding Payments Without Paying the Piper, by Claire Hensler.** No matter how meticulous your payroll procedures, you're bound to get an "oops" once in a while. And that means voiding payments in JD Edwards®. This isn't a long, tedious procedure; in fact, it's pretty easy, according to Claire Hensler. But, as Claire points out—it's the "gotchas" that can make what should otherwise be an easy fix a real chore. Claire takes you through the steps of payment voids, highlighting those oft-missed traps.

W **Payroll Timecard Integration Simplified, by Paul Hanson.** The methods may be hi-tech, but the need is the same: making sure you track employee time accurately. Integrating a third-party time tracking system (such as Kronos™) with JD Edwards can be a tricky situation. In the "time"-honored JDEtips tradition, Paul Hanson offers his interface design and code — saving you time and expense. Punch in here to learn more!

E1 W **Maintaining and Reporting on "Clean" Benefit and Dependent Information, By Bonnie Lanham.** As employees, we are often perfectly willing to put up with a lot of things we don't especially like, and keep our mouths shut about it. But, please – don't mess with my paycheck and don't mess with my benefits! The better part of valor for a Human Resources department is to ensure the benefits information for the employees and their dependents is clean and accurate well before it becomes a problem for the employee. This article gives us some valuable tips on how to make sure everything lines up in this area – from the application side and through reporting. Be a good idea to take a look at this before you send out your annual benefit enrollment change packets!

E1 W **Step Progression with Union Tables, by Bonnie Lanham.** In this article, Bonnie Lanham walks us through the cumbersome process of Step Progression with Union Rate tables, the number one leading topic of Response Line calls. Save yourself some on-hold time and read this article first! If your company is contractually committed to a sequence of fixed pay increases, this article is a must-read.

E1 W **Hints for Collecting Payroll Deduction Arrearage, by Bonnie Lanham.** This article serves as a classic example of why we have computers in the first darned place… which is to do stuff for us so we don't have to remember to do them ourselves. Save sticky notes and follow these instructions to set up your Payroll system to automatically collect benefit deductions after an employee returns from unpaid leave. Bonnie will make you a believer in the use of DBAs to automate tasks that may otherwise slip through the cracks.

W **Automating the General Ledger Reconciliation of Payroll Deductions, by Barbara Kusmierz.** Sometimes all we want is a simple solution. Something that doesn't require a super-user. Something we can do ourselves to make our lives a bit easier without having to beg assistance from our technical team. Barbara Kuzmierz, in her first contribution to JDEtips, shows us how your Payroll users can do some simple setup and prepare their own report to help with the reconciliation of Payroll Deductions. If you are looking for highly sophisticated solutions, this isn't it. If you are looking for the do-it-yourself road to self-sufficiency, then this article is for you.

E1 W **Preparing for Payroll Year-End – From Beginning to End, By Bonnie Lanham.** Every year, it's the same. We fight through year-end processing and the whole time, we are wishing we had taken the time to plan better. But we don't have time! Bonnie Lanham has just taken the time for you and has given us the steps to prepare now for this year's Payroll closing. By following her recommendations, perhaps you'll all get a bit more sleep this coming December.

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E1 W **New Federal Overtime Regulations, By Bonnie Lanham.** JDEtips is publishing this article to help your HR and Payroll departments start to wade through the new overtime regulations enacted in August 2004 by the US Department of Labor. Bonnie Lanham's involvement with the HR community through her consulting engagements inspired her to do this research, and has agreed to share it with all of us. While not a technical article, it contains valuable information that no HR department can afford to disregard.

W **Setting up Vacation Accrual in PeopleSoft World, by Bonnie Lanham.** Now, here's a topic that everyone can relate to! Vacation! But to those of you who are responsible for keeping track of employee vacation accrual, it probably doesn't carry quite the same sense of excitement. Ace HR/Payroll consultant, Bonnie Lanham, walks us through the steps to set this up correctly while guiding us around the bumps in the road. If you follow her guidelines, you won't have to hide from your employees when they get their vacation statements.

E1 **Payroll History Conversion, Scott Warwick, Anderson Warwick Consulting.** Scott Warwick shares his insight into some of the trials and tribulations inherent in converting from a legacy payroll system. He gives us an overview of the history conversion process with an emphasis on preparation – what questions you must ask first – then reviews the steps, pointing out some of the "gotchas" along the way, then finally offers three special tips to help make the process successful.

E1 **Payroll Processing - Behind the Scenes, Scott Warwick, Anderson Warwick Consulting.** Payroll is one of those huge modules that has so many tables and major business functions that it is difficult to get a grip on it. Scott takes time away from his usual tips approach to review the technical aspects of payroll processing for the JDEtips audience. The information provided here may save valuable time understanding the payroll process and debugging problems, should any occur. This article applies to OneWorld® only.

E1 W **How to Setup More Than Two Insurance Deductions, Scott Warwick, Anderson Warwick Consulting.** You asked and JDEtips responds! A few weeks ago we polled some of our HR/Payroll readers and asked them for ideas on topics they would like to see covered in the newsletter. Scott responds on one of those topics, how to setup Spousal Life Insurance. (Even though it looks like you can't because there are only two insurance fields and those are typically used for Employee Life and Employee Disability).

E1 W **Where Does the Payroll Tax Area Come From? Scott Warwick, Anderson Warwick Consulting.** Scott tackles a common problem at JDE's payroll clients. Sometimes the tax area on a timecard just doesn't seem to default in the way it should. Learn about how this works and the hard-coded hierarchy that controls the tax area. This tip applies to both World and OneWorld.

E1 W **Daily Timecard Post Procedures, by Davine Walsh.** Davine Walsh shares your pain. Her unique perspective of both the Payroll process and General Ledger give her the ability to see both sides of problems and find creative ways to solve them in such a way that truly repairs the original error rather than applying a band-aid at the tail end.

E1 W **HR and Payroll Issue of JDEtips, Klee Associates.** This issue of JDEtips was written by the former head of JDE's HR/Payroll Development Group. The lead article is a comparison between World, XE, and ERP 8. Detailed tips are also included on DBA, Pay Types, and AAIs.

E1 W **Payroll Journal Entries and Reconciliation, Scott Warwick, Anderson Warwick Consulting.** Scott covers the basics of those complicated Payroll Journal Entries like the pro he is. Then he gives the inside scoop on how to reconcile the Journal Entries to the Payroll. If there's no problems, he says he can show you how to do it in five minutes or less.

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E1 W **User Defined DBAs, Tammy Riusech Swetnam, SARLO Enterprises, Inc.** Tammy's seven years of JDE HR and Payroll experience led her to develop this tip for several clients. Did you know that it isn't extremely difficult to add your own calculation methods? We appreciate her sharing it with the rest of the JDEtips community! And so do clients who save thousands of dollars in custom programming costs.

E1 W **Four Options For Setting Up Department Codes, Scott Warwick, Anderson-Warwick Consulting.** Did you know that there is no standard method in the HR/Payroll suite to indicate what department an employee is in? Scott explains four ways to set this up, and the pros and cons of each method.

E1 W **Generate Salary Timecards with Timecard Templates, Scott Warwick, Anderson Warwick Consulting.** Learn how Payroll's timecard templates can help you save time posting salaried employee payroll. Scott is an expert at Payroll, with over 6 years experience.

Humor

Cartoon Caption Contest, Round 2. Ah, yes, we have some clever thinkers amongst our readership. Last issue, we presented a cartoon, drawn by our wonderful cartoonist, Mark Hill. We asked you, our readers, to give us your take on what this cartoon is trying to say in our first Cartoon Caption Contest. Now, we have the three top captions available for you to vote on. Plus, a fresh cartoon that just begs for a great caption from YOU.

Cartoon Caption Contest, Round 1. Think you can you make us chuckle? How about make us laugh out loud? Better yet, can you throw us into a fit of side-splitting, tears rolling down the face laughter? Then, join us on our humor page---we'll give you the material to work with, you give us the punch line. So, are you up to the challenge? (Contrary to popular belief, it does take a lot to amuse us!)

Debunking a JDE Urban Legend. Your ever-alert editorial staff here at JDEtips is constantly on the look-out for sources of entertainment/amusement. Sometimes we have to resort to making it up ourselves –but then we wonder if we are only amusing ourselves… Then, out of the blue, we discover that you, our faithful readers, are quite adept at amusing yourselves, not to mention us.

ERP Buzzword Alert: SOA, by Andy Klee. In the interest of ensuring that our readers have the opportunity to keep current with the ever-changing world of technology, we are once again offering up the latest news in buzzwords. This is not to be missed. But beware! There is, in fact, a test in this one, so you'd best pay attention. P.S. Andy says this is the real reason he publishes JDEtips—so he can work on his opening act for Larry and Co.

Wank Words Bingo. We aren't sure where this was born, but it appears to have taken on a life of its own. Yes, we confess we swiped this off the Internet – it is available in so many places, we declared it "public domain" and decided to share it with those of you who may not have run across it. In the interest of improving meeting attendance and attentiveness, of course.

Resumes from Hell, by Jon Reed and Rachel Meyers. In the March 2005 issue of JDEtips, we introduced Jon Reed, Managing Editor of SAPtips, our sister publication. We thought you might like to know that Jon has a lighter side, as well. Or perhaps it's his dark side. Hard to tell with that guy! Jon teamed up with Rachel Meyers and illustrator Rusty Johnson to create a book called "Resumes from Hell", in which they share experiences from their professional recruitment years. We offer here just a taste – and you can get a bit more from http://www.resumesfromhell.com. You will either laugh or weep – depending on how many resumes you've had to wade through in your career. If nothing else, you could use this book as your guide for how **not** to write your resume.

And now for a touch of humor… BLM – Buzzword Lifecycle Management, by William Sheppard.
We found this hilarious and we think you might, too. Thanks and a JDEtips of the hat to the folks at TechnologyEvaluation (http://www.technologyevaluation.com) for granting us permission to share with you this bit of genius by William Sheppard. Our esteemed Publisher found this the perfect cure for the "Too many TLAs" syndrome. And for the novice – that stands for "Too many Three-Letter Acronyms"!

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Manufacturing

E1 W **Product Costing - Best Practices, by Heering Ligthart.** There's so much to think about with product costing: the amount of detail you'll need, maintaining master data, variances… the list can go on. This article by Heering Ligthart discusses some key topics for managing Product Costing efficiently. He'll cover best practices in costing security, using "Last In" calculation, working with multiple branches, and finally recording and finding historical costs.

E1 W **Hidden Gems and Low-Hanging Fruit within JD Edwards Manufacturing (Webucation recording and PowerPoint), by Pat Martino.** There's so much untapped value in your Manufacturing module that you may not even know about--until now. Join JDEtips' Manufacturing expert Pat Martino and get caught up on what you might be missing in several areas, including Product Definition,' Shop Floor Management, Product Costing/Manufacturing Accounting, and Manufacturing Planning.

E1 **JDEtips Guide to Bill of Material and Routing Types, by Pat Martino.** Finally, a comprehensive guide to understanding the bill of material and routing types available in JDE Manufacturing, besides “M-type” (standard). In this article, Pat Martino lists and defines the various types for both BOMs and Item Routings, including examples of when you want to step out of the M-type box.

E1 W **Swapping Bill of Material Components in an MRP Environment, by Pat Martino**. Let's see… on the one hand, I could use item substitution. On the other hand, I could just delete the old item off the BOM. Then on the other hand… Oh, wait. I only have two hands. You'll need more than two hands to consider the possibilities for retiring a component and replacing it on open BOMs. Pat Martino shows how to think this through without utterly confusing your MRP and while retaining item history. It's up to you, really, which way you choose, but at least now you'll have a basis for making the right call.

E1 W **Managing Low and Irregular Demand Using the Configurator, by Jonathan Rose.** Yes, the Configurator can be your friend! Maybe it is a bit complex to casually throw in as a first-pass solution for managing demand, but according to Jonathan Rose, there are benefits to using this functionality for planning in companies that assemble to order (ATO). While you can always start down the solution path using planning bills of materials, you'll soon discover that they require item master/item branch records for every combination of components that might be assembled and sold. So as Jonathan notes, using the Configurator instead to drive lower-level requirements allows you to plan at the product family level without having to figure out the forecast demand for each variant.

E1 W **Work Order Backflushing Basics, by Pat Martino**. Sometimes it’s those little known tips that can lead to bigger savings; and this article from our Manufacturing guru, Pat Martino, on Work Order Backflushing is a perfect example. As usual, Pat combines his extraordinary knowledge of JDE® manufacturing software with his ability to recommend business process improvements. Whether it’s to reduce overhead or more efficiently process work orders, this “beginner’s” guide addresses your needs, and more.

E1 **EnterpriseOne® MRP Net Change, by Mike Wright.** What do you do when you have a duplicate demand problem, but running MRP to correct each problem is not an option, and MRP’s standard net change approach won’t fit the bill either? That was the problem Mike Wright and his team were challenged with—coming up with an MRP net change approach that was customized to meet their company’s needs, but one that wasn’t so loaded with custom code that it created a host of other problems. In this article, Mike documents the final solution, including code that you can adapt to meet your company’s specific net change needs.

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E1 W **Utilizing Process Manufacturing Work Orders in Discrete Manufacturing Environments, by Pat Martino.** Is it possible to use JD Edwards® Process Manufacturing application in a discrete environment? Yes it is, says Pat Martino. In this article, Pat demonstrates how these capabilities can be used to complete different items to stock against a single work order, handle recoverable materials, and more. And remember, if you like the tips you read here, you can get a lot more great advice from Pat at any of his JDEtips University's Manufacturing workshops.

E1 W **Using MRP Messages to Plan Container Loads – A Custom Solution, by Elizabeth Neiman.** Would you like to know how to optimize container usage for incoming overseas shipments? I know I would! Elizabeth Neiman explains, based on her company's experience in transitioning from a very clunky manual process to a streamlined, automated process that's MRP-message driven. Allow her to demonstrate how a custom modification of standard JDE® software resulted in better use of both container space and buyers' time.

E1 W **Manufacturing 8.12 Resource and Capacity Planning, by Pat Martino.** Pat Martino has written a fantastic manual to go along with the Manufacturing Planning 8.12 class that Klee Associates offers. As a special treat for the New Year, SAPtips is offering one of the chapters from that manual as a White Paper. Peruse this chapter on Resource and Capacity Planning and just imagine the valuable knowledge found in the rest of the class.

E1 **Discrete Work Order Line Scheduling, by Jim Evans.** Make the most of your production line scheduling with standard functionality found in JD Edwards® manufacturing. Jim Evans demonstrates how to use the Line Sequencing Workbench to maximize production and minimize setup and cleanup time, based on the capacity of your Work Centers. Jim walks us through two scenarios: one Production Line to Work Center and one Production Line to multiple Work Centers.

E1 **Introduction to Demantra® *Demand Management and Real-Time Sales and Operations Planning Integrated to JD Edwards EnterpriseOne®,* by Linda Peel.** We invited Oracle® Strategic Specialist Linda Peel to give us a preview of how the Demantra product works and how it integrates with JDE® Enterprise One. In the process, Linda gives us some great insights into the concepts and pitfalls of demand planning in general, then moves on to show us how Demantra fits into the scheme of things. She then wraps up with an overview of how this all fits in with your existing JDE Distribution, Manufacturing, and Planning modules.

E1 W **Introduction to Implementing Lean, by Pat Martino.** We've told you about our JDEtips Mastery Level Workshop on *Implementing Lean* in the JD Edwards EnterpriseOne and World Supply Chains. We've decided to show you just a little bit more so you can see if you are interested in this course, which is intended for Senior Management such as C-level executives, Vice-Presidents, Directors, Operations Managers and, above. Controllers, Production Control/Materials Managers and above, and Application Managers and above. It is also beneficial for other staff with an interest in running lean ,such as planners, shop floor managers, etc. While this brief section of our 400+ page workshop manual will not show you how to implement, it will give you a great overview of the concept.

E1 W **Nettable vs. Non-Nettable Supply in MRP, by Pat Martino.** How do you make a non-nettable item count in MRP, but not in Inventory Management or other applications? Pat Martino has the answer. This article provides the setup needed to take those un-seeable items and make them visible to those who need to be "in the know", while keeping the information hidden from the rest. So if your planning staff struggles with the effects of non-nettables**,** this is one tip that's sure to have them thanking you!

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E1 **Manufacturing Kits – An Overview, by Barry Card.** Do Distribution Kits offer too little to meet your business needs, while Configurator seems like overkill? Manufacturing Kits maybe just what you need. Barry Card presents some key points as to why you may want to consider Manufacturing Kits as an option, along with an overview of how they work, product costing, and some key tips to consider. He also provides the sequence for building Manufacturing Kits, once you've determined if this is the solution for you.

E1 **External Business Functions and the Configurator, by Roma Drzymala**. There are many benefits to be found in the External Business Function References feature of the Advanced Assemby Inclusion Rule. But it takes two rather different skill sets to bring this feature into play: A strong understanding of the Configurator, coupled with the ability to create a business function. Chances are, you have people who can do this as a team; you just need to find them. And once you do, this article by newcomer Roma Drzymala will help you set the stage for putting External Business Function References into your Assembly rules, thus incorporating more accuracy, while saving time. And that is truly thinking JDE!

E1 W **Processing Returns of Configured Items, By Cordell M. Kirk.** The Configuration Management system within JD Edwards is an awesome feature for any manufacturing company that specializes in custom designed products. But, did you know it can be used for returns as well as orders? True to the JDEtips mission to help you get the most out of your JD Edwards investment, Cordell Kirk presents a great business case, followed by a detailed step-by-step instruction on how to use the Configurator to increase the efficiency of your custom-order return processes!

E1 W **JD Edwards Materials Planning, Demand Rules, and Forecast Consumption, by Terry Horner.** You make 'em, they consume 'em—that's how the mighty world of business goes round. Understanding supply vs. demand is an art unto itself. There's no real easy way to determine how much product to make to satisfy customers' needs and avoid critical backlogs, without overstocking the warehouses with worthless product. JD Edwards software allows for forecasting, but the question of which methods to use, when to use them and how to use them often alludes us. Terry Horner has some great thoughts on how to calculate and forecast demand that will hopefully set you on the right track. . . or at least one that is easier than trying to "guesstimate" how much product you'll need to plan for.

W **World's Lost Treasure – Rate Based Scheduling, by Pat Martino.** Don't you just hate when companies mess with something that's good, and the "new and improved" result is NOWHERE NEAR as perfect as the original? (Are you thinking "New Coke?" We knew you were. .) Well, the Rate Based Scheduling application for World 8.1 and EnterpriseOne is a perfect example of taking something simple and easy, and making it more complicated. . .messing with a good thing. But, as Pat Martino, points out, it is possible to resurrect the "old" in the new when it comes to this alternative to work orders. Join him as he takes you through the steps.

E1 W **Safety Stock and Safety Planning Techniques for Improved JD Edwards DRP/MPS/MRP Planning, by Terry Horner.** Do you feel like you need a crystal ball to figure out safety stock? How do you decide when safety stock is a good business practice, and when it is a frightful waste of company resources? What's the best way to avoid stock-outs without unnecessarily tying up warehouse space? Terry Horner takes an in-depth look at this oft-misunderstood concept and offers various strategies to improve your safety planning using JD Edwards.

E1 W **Overview of the JDE DRP//MPS/MRP Planning Process, by Terry Horner.** At JDEtips, we love gotchas. Terry Horner is a solid manufacturing consultant who has found many gotchas along the way. In this article, he gives us an overview of the planning processes for DRP, MPS, and DRP. He describes the behavior of the various planning levels, gives us some tips on how to best use them, then, as promised, provides the gotchas. And if you thought "time fencing" was just a buzz word, don't stop reading until you get to the section where he explains how to improve the validity and stability of your DRP/MPS/MRP messages and to reduce the "nervousness" of your messages through fence policies and procedures.

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JD Edwards Forecasting, by By Greg Gibson and Terry Horner. Many of our JDEtips articles are inspired by our readers. This one was triggered by an inquiry to our HelpDesk wondering why Forecasting wasn't coming up with the expected answers. So, we asked Terry Horner and Greg Gibson to collaborate on the subject. They not only accepted the challenge; they outdid all expectations! Read how it works, how to set it up, how to understand and use the results – and of course – the gotchas! One of our Manufacturing reviewers remarked, " I have never used JD Edwards Forecasting and yet I feel like an expert after reading the article." We hope you agree!

8.9/8.10 Shop Floor Enhancements, by Pat Martino. Pat Martino, our JDEtips Associate Editor for Supply Chain / Manufacturing and author of some of our JDEtips training manuals, has applied his knowledge to summarize some of the enhancements in EnterpriseOne® Shop Floor Management for 8.9/8.10. Pat walks you through some of the key processes while pointing out the improvements. So put on your walking shoes and get ready for the guided tour!

An EnterpriseOne Marriage: Configurator and Manufacturing, by Thom Blake. Okay, I have Manufacturing and I have Sales Order Configurator. I need some parts from one and some parts from the other, and I need them to work together. Can this be done? Thom Blake was faced with this challenge, and with a strong development team and dedicated business function team, a custom solution was the result. The solution is to allow the Sales Order Configurator to drive Manufacturing processes for unique, on-demand products. In short, you configure an item as a sales order is created, and this item is then converted into a standard manufactured and inventoried item.

A Manufacturing Solution for Managing Maintenance or Repair Operations, by Mike Shapiro. Talk about thinking outside the proverbial box! Mike Shapiro ran across a situation that got his wheels turning and churning and came up with a solution for using the Manufacturing module in a way that one would not normally consider. In this scenario, the client had not implemented CSMS or EMS but needed to track goods returned for repair by the customer. Take a read at this. It will give you a whole new way of thinking about how to get the most from what you have.

Kanban Made Easy, By Mike Shapiro. When Mike Shapiro suggested to this editor the notion of an article on kanbans, her mind swirled with images of… what? Dog food? Something you might order in a sushi bar? A sugar-free diet? Well, if you are as mystified as I was as to just what the heck that term meant, this article should help bring your imagination back to earth. Turns out kanban is both a concept and a very specific technique supported by the World and EnterpriseOne Manufacturing suites. Mike shows us how we can come even closer to that lean, mean, manufacturing machine we strive for!

Serialized Parents having Serialized Children – Who Knew?, By Dan Bolland. Let no widget go untraced. In this article, Dan Bolland shows how we can account for the components that go into the making of a finished good and trace them back from the Work Order by serial number. There is, of course, some setup involved, but that's okay, because Dan shows us exactly how to get the serial numbers set up and linked. Pretty powerful stuff!

Supplier Scheduling, By Pat Martino, Focus Systems. Sometimes more is better, and sometimes less is more. In this article, Pat Martino discusses the scenarios where Supplier Scheduling should be employed to enhance standard MRP. He brings us through the reasons for implementing Supplier Schedling, then shows us how. He shows us also how to optimize and streamline the process—actually cutting the number of processing steps in half!

Quality Management, by Bob Tezyk. The JDE Quality Management (QM) module is relatively new. It has been incorporated into the manufacturing suite in WorldSoftware since A8.1 and since B733 in EnterpriseOne as product code 37. Even though it is part of manufacturing, it also integrates with Sales Order, Inventory, and Procurement. It also plays a role in the ECS (Energy Chemical Solutions) through Bulk Load Confirmation. In short, JDE's Quality module is fully integrated with the entire supply chain.

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E1 Recommendations for Parallel Processing, Brian Freund, Freund Consulting. Parallel Processing versions of MRP programs (R3482 and R3483) are available to speed up the execution of these resource intensive batch programs. Brian tells us how to setup and run these versions based on his extensive application and technical knowledge. This document will tell what needs to be set up to make it work and give you a starting point for fine tuning performance. Many companies have experienced times savings of over 50%, with some reducing run time by over 90%.

E1 W Shrink – Scrap – Yield, Michael N. Shapiro, CFPIM, CIRM, Polaris ETC. Michael covers Production Losses to address the additional material and time resources required to make up for known and planned losses that occur in manufacturing. This first article focuses on PDM and SFC JDE (Systems 30 and 31). Look for future issues of JDEtips to contain follow-up articles that address the impacts of production losses on other systems such as: Standard and Actual Costs (Systems 30A and 31A), how Requirements Planning—Systems 33 (Capacity) and 34 (Material) address production losses, and Quality considerations (System 37) including test requirements and grade/potency considerations.

E1 W The Cost Impacts of Shrink - Scrap - Yield, Mike Shapiro, Polaris Education and Training. Mike follows up on his previous article on Shrink – Scrap – Yield with a detailed analysis of the cost implications of these aspects of manufacturing. As Mike says here, "with good data on what material losses are, where in the value adding process they occur, and what it might cost to correct them, management can focus efforts to get more product out for fewer dollars in." Those are the type of results you deserve to get from your ERP investment. Who else better to help you gain full value from your JDE investment, than a seasoned professional like Michael? This article applies equally to WorldSoftware and OneWorld.

E1 W Scrap and Waste Management – Offsetting Production Costs, Mike Shapiro, Polaris Education and Training. In the May/June, 2003 issue, when we examined Shrink, Scrap and Yield on parts stamped from sheet metal, we mentioned in passing that material costs may be partially offset by the scrap metal sold for salvage. This article looks at how the material component of production costs may be partially offset by the salvage value of the recoverable scrapped metal generated during production.

E1 W Handling Serialized Items in a Distribution / Manufacturing Environment, Stephan Feist, Strategix, Ltd. Stephan gives us a solid review of the four major options that JDE has in the area of serial number tracking within Manufacturing and Distribution. If you have serialized items, you'll want to study this carefully before deciding how to handle serial numbers.

E1 W Extending the Supply Chain to Become the Supply Web, Roy Peters, CFPIM, Klee Associates. Most companies look at the supply chain in terms of what is happening inside the company and with their immediate customers and vendors. But to improve profitability in these tough economic times, we need to take a page from the book of Wal-mart and the book of Dell and consider the entire extended supply chain. We sell to our customers who sell to distributors, who sell to retail outlets, who sell to the ultimate consumer. Our vendors buy from their vendors, who buy from their vendors who buy from the provider of raw materials. You get the picture. A lot has been written about the extended supply chain, much of it is full of cliché and hot air. It's time for Roy Peters, Director of Supply Chain Services at Klee Associates, to weigh in with his real-world experience. The first in a series of articles.

E1 W Understanding Forecast Consumption: Planning Fence Rule H, Pat Martino, FOCUS Systems. Pat has the knack of simplifying complexity, something we all need more of in the workplace. Here, he takes a fairly complex topic, Forecast Consumption, and explains in detail what you might be missing in terms of manufacturing to meet your true demand. Planning Fence Rule H is the most overlooked planning fence rule in JDE. Learn what it can do for your bottom line, right here!

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Engineering Change Order Processing, Keith Hiatt. Keith is one of the leading experts in the use of JDE's Change Order Processing functionality. This White Paper gives you a clear, step-by-step, understanding of this topic. You'll also get a preview of the major Gotcha's to watch out for!

Getting Manufacturing Accounting Straight for Rework, Pat Martino, Focus Systems. Pat is an experienced manufacturing consultant with a flair for coming up with simple solutions for complex problems. Learn how to properly account for rework with this tip!

MRP & DRP Explained in Detail, Pat Shannon, Patrick Industries. Benefit from the hundreds of hours other clients have spent testing MRP and DRP. Reading this 50 page document will save you many lost days and nights! Pat is a Systems Analyst at Patrick Industries, a JDE client.

How Master Planning Families Can Be Used As Execution Tools, Dennis Hammond, Harbinger-Robin Consulting. This White Paper gives you some good ideas on how to use the Master Planning Family Category Code to give you maximum benefit. It can be used in a variety of creative ways to help drive your planning process.

Tracking Availability & Remaining Life of Production Tooling, Jim Evans. Jim Evans is a Mastery-Level Manufacturing Consultant. If you are a manufacturer, then you should read this White Paper for creative and practical ideas on how to track Production Tooling.

Manufacturing For The Rest of Us, David Mallory, Denver Water Department. Need to understand the basics of Manufacturing terminology? David Mallory takes us to the mythical AWC company to learn how they manufacture widgets. If you are a Financial or Distribution type user, this White Paper will prove very useful.

Manufacturing Accounting Issue of JDEtips, Roy Peters, Klee Associates. Ten pages that follow an example all the way through the manufacturing process to the General Ledger. If you aren't using this module, then you can't explain your variances, and you are missing a great deal of useful information.

Phantoms vs. Subassemblies, Rob Ekblad, Klee Associates. Are some of your Bill of Material components also sold separately as repair parts? If so, then you probably need to read this tip by one of our manufacturing experts, Rob Ekblad. Rob presents six different ways to handle this, with pros and cons listed for each alternative. The appendix includes screen shots showing the various alternatives in detail. Another perfect example of why JDEtips is here--to save you time by giving you the benefit of a master consultant's experience.

Subcontract Planning Overhead X Factors, Pat Martino, Focus Systems. As a manufacturer, you may use some outside subcontracting firms for part of your process. If you do, you'll want to read this tip to understand how to setup JDE (either WorldSoftware or OneWorld) to properly account for the outside labor. Don't get Xed! Read this instead!

EnterpriseOne Base Configurator – An Introduction, by Peter Bannister, 1st Consulting, LTD. If yours is a "Make to Order" type of manufacturing environment, the Configurator might just be the ticket to automating much of the ordering and inventory aspects of the operation. Peter Bannister outlines for us the industry types that lend themselves to using the Configurator, presents alternatives available for these industries, and gives us an overview of the basic rules used within the Configurator. He then steps us through a test case of the Configurator.

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Project Management & CIO Corner

E1 W **Removing the Barriers to Project Ownership, by Steve Phillips.** Your company is about to implement new software. The technology has been selected. A consulting firm has been retained to assist. What's stopping you from succeeding? The biggest barrier to successful projects isn't what's coming from the outside; it's how well you and your team take ownership of the project that matters. Project management guru, and JDE client, Steve Phillips discusses what steps every company should take from the inside to make sure their project has the best chance for success.

E1 **What's Hot with JDE EnterpriseOne 9.1, by Greg Davis,(Webucation Recorded Session and PowerPoint)** The JDE world is all abuzz about E1 9.1. From the new features, to best practices, to planning your upgrade and more, this webucation session offers an outstanding primer to what this new release has to offer.

E1 **JDE Xe to EnterpriseOne 9.0 Upgrade from a Development Perspective, by Brian Oster.** What goes into a successful upgrade project from a development point of view? Brian Oster shares what he and his team did before, during, and after their company's upgrade from Xe to 9.0. Great tips and best practices on planning for the implementation, Spec Merge, Database Conversion, the Upgrade SDLC, retrofitting, and Unicode are included in this article.

E1 W **JDE Upgrades (Webucation recording and PowerPoint), by Greg Davis.** Expert advice on what it takes to ensure a successful JDE upgrade, including discussions on common mistakes, best practices and MarketSphere's proven upgrade methodology.

E1 W **Training and Retention Beats Knowledge Leakage (Webucation recording and PowerPoint), by Cushing Anderson.** One of the foremost experts on ERP training shares his insights on the role training plays in enhancing the likelihood of JDE project success.

E1 **Umbrella in a Hurricane: Managing the Storm of Change to Your Business During Your E1 Upgrade, by Terry H. DeMoure**. Have you ever notice how prior to a storm—some people really prep themselves for all possible contingencies, while others just wait it out, hoping for the best? According to Terry DeMoure, preparing for an upgrade is like getting ready for a storm—there are a lot of details that need to be followed up on prior to go live in order to mitigate risks and ensure the best possible outcome. In this article, Terry documents the best practices and steps his company took to make sure their upgrade results were positive. If there's a storm of upgrade change brewing in your company, this article offers some excellent tips to help you prepare your team.

E1 W **Multi-Country Implementation Strategies, by Jan Jaap Weerstand.(Webucation Event Recording)** Doing a multi-country rollout of JD Edwards can be a massive undertaking. Will you use a centralized or decentralized approach? How will you get a grip on the legal/tax requirements, localizations, and cultural differences in each country? All while trying to meet your implementation schedule and project budget.

Learn from Steltix, a European-based Oracle Platinum Partner, with over 15 years experience running multi-country rollouts of JDE. We'll cover best practices, a proven methodology, and hard won tips--specially designed for JDE clients involved with multi-country implementations.

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E1 W **Issues in Technology Leadership, Part 4: Organizational Structure, by CJ Rhoads**. Who makes the technology decisions in your company? Is it the CIO? Or the CFO? Or is it some combination? And how is your IT department structured? Is it one centralized department, or does the IT team span many departments and locations? These are just some of the questions that CJ Rhoads discusses in her latest installment of her series on Issues in Technology Leadership. As always, CJ provides sound advice on what, from her experience, are the points that you need to consider when it comes to the structure of your corporation's technology organization. Keep in mind—one size does not fit all.

E1 W **Issues in Technology Leadership, Part 3: Budgeting, by CJ Rhoads.** Once a year, business managers participate in a practice that is normally reserved for fortune tellers: they try to predict what is going to happen in the future. Or, as they more formally call it—budget planning. We jest about the process, but in truth, it's very hard to project budgets for the upcoming year, especially IT budgets. While CJ Rhoads doesn't have the answers to nailing your budget exactly to the penny, she does present some areas in which you can actually plan for future IT expenses, rather than guess, and thus see your budget in a much clearer light.

E1 W **Issues in Technology Leadership, Part 2: Making Decisions, by CJ Rhoads.** Decision making: Is it easy for you? Or do you agonize over every possibility, thus finding yourself paralyzed by the fear of making the "wrong choice"? In this second article in her series on Issues in Technology Leadership, CJ Rhoads defines the considerations you'll want to take in order to make the best possible technology decisions for your company.

E1 W **Issues in Technology Leadership – Part 1: The Economy, by CJ Rhoads.** Last March, Dr. CJ Rhoads predicted the economic crisis was coming and now it's what everyone is talking about. But, what is everyone doing about it? In the first of her new series, Issues in Technology Leadership, Dr. CJ Rhoads takes on the economy topic again, this time with the six actions you should take from an IT perspective when the finances are tight. Take a look now at the bigger picture in the long run, and let your leadership set course.

E1 W **Closing the ERP Knowledge Gap: The Iterative Cycle of Training and Consulting, by CJ Rhoads.** We asked CJ Rhoads, our CIO Corner writer, to explain the relationship between consulting and training in a "typical" ERP implementation. CJ's unique point of view should help clients get greater results from their investment in outside services.

E1 W **The Big Project – Part III: Communication, Communication, Communication, by CJ Rhoads.** All right…so far, you've asked the tough questions needed to decide the viability of a project, and determined it's a go. You've picked a project manager who derives great joy from making a project plan and checking off tasks. So now, you're all set to let this project fly, right? Not. So. Fast. Is everyone involved in this project wired in on the details? The successful execution of any project lies in how well the information is communicated. As she wraps up her series on big projects, CJ discusses what constitutes proper communication for a project including the stages of absorbing the message, what needs to be communicated, and some tips for getting the results you need.

E1 W **The Big Project – Part II: What Makes a Great Project Manager, by CJ Rhoads.** So you're interviewing a PMI-certified Project Manager—does this mean that you have the right candidate for your upcoming project? Maybe. Or maybe not. While there are some skills that you can acquire through training, some jobs require a gut check to see if you really have what it takes. CJ Rhoads is no stranger to key project management attributes—and she shares her journey of self-discovery that has led her to believe that project management isn't a job as much as it's a calling. Read this article, then decide if you (or your PM of choice) have the right stuff.

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E1 W **The Big Project: Questions to Ask Before You Plan, by CJ Rhoads.** Nothing says career limiting maneuver like a failed project. The money, the time, the red faces… Sadly, it's often not the project itself and how it's executed, but the time and effort spent upfront—in the proposal stages—that can determine whether a project has a chance of succeeding. Or more succinctly, being voted "most likely to fail". With that said, if your company is gearing up to implement a new technology, before you spend one dime, STOP and ASK the questions CJ Rhoads presents in this article. You could save a lot of money—and your PM a lot of face—if your research is done up front.

E1 W **Application Lifecycle Management: Does It Make Sense?, by CJ Rhoads.** If someone tries to sell you an Application Lifecycle Management solution (ALM), should you immediately request a PO from your purchasing department? Or should you run—fast? When it comes to ALM—the latest TLA (three letter acronym) to join ERP, CRM, SOA, and the rest in the IT vernacular, CJ Rhoads has a few thoughts on the "benefits" of ALM technology that she'd like to share.

E1 W **IT Spending in an Uncertain Economy, by CJ Rhoads.** We're all reading the headlines about the downward trends in the economy. We're tightening our own belts, while our companies are doing the same. So it should come as no surprise to anyone that IT budgets will be among the likely victims during this economic crunch. But, is this the right response? CJ Rhoads has the answer—and you might be surprised at what her verdict is.

E1 W **Supporting EnterpriseOne® with a Small IT Shop, by Lisa Tran.** If you think that JD Edwards® is only for large corporations, think again! Lisa Tran of Stoner, Inc., demonstrates that even in a small company, JDE® can be worth the investment. Lisa, a faithful JDEtips Journal reader, shares with us how her company of 50 full-time employees successfully uses JDE "to work smarter, not harder." This case study is a great testimonial to the practices one company has employed in order to, as we love to say at JDEtips, master their software and maximize the value of their JDE investment!

E1 W **Maximizing Planning and Technology Use for Business Health, by CJ Rhoads.** So, you've got a Project Manager and a team all lined up, the project is a go, you're ready to rock and roll—this should be smooth sailing from here on out, right? Ummm…not necessarily. If there's one place that Murphy's Law prevails—scratch that, make that RULES—it's an IT project. CJ sums up the reality of why IT projects fail—including the realities of project planning for IT and the warning signs of when to drop and run.

E1 W **Do You Have What It Takes To Be a CIO?, by John A. Zarb.** Are you ready for the C-level? Sure, you've got a great resume and you know you can lead. But do you have the heart to be a Chief Information Officer? John Zarb has over 38-years experience in IT; 12 of that he's spent as a CIO. As he'll tell you—there is a very good reason they pay you the "big bucks". Whether you're a director who's the "heir apparent" to the current CIO, or you're at the bottom or mid-rung of the corporate ladder, hoping to climb your way to the top, you'll want to read John's assessment on the leadership skills and other considerations you'll need to take into account before you say, "I want that job. Sign me up."

E1 W **Maximizing Staff Experience and Technology Use for Business Health, by CJ Rhoads.** Is your staff technically adept, non-technically adept, or a mixture of both? Leveraging your staff members' individual skill sets (and corresponding personalities) is often the key to improving your business health through technology. Especially when you consider that all the hardware and software in the world is only as good as those who use it! CJ Rhoads continues her quest to help companies improve their business health by understanding the human part of human resources. See if you can identify your staff in these descriptions, then read CJ's tips for successfully managing these greatly varying personalities!

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E1 W **To ASP or Not to ASP?, by CJ Rhoads.** To ASP or not ASP, that is the question. 'Tis better to "rent" or to "own" applications? Ask CJ Rhoads her opinion of Application Service Providers (in case you were confused as to which ASP we're talking about here), and you'll get a very frank discussion on the pros and cons of this concept. If you're wondering if ASP is for you, then you'll want to read what CJ has to say first. (We'll give you a hint: Neither a borrower or a lender be.)

E1 W **Optimizing Financial Investment and Technology Use for Business Health, by CJ Rhoads.** CJ's back and she's switching gears! After years of research and countless articles on how to get the most out of your IT investments, Dr. CJ Rhoads is taking a closer look at overall business health and the role IT plays in the bigger financial picture. If you've believed that effective technology use can only enhance business, you need to read this series of eye-opening articles. In this issue, CJ gives you the 411 on when you're likely to get a great ROI, and when you need to hold your dollars for other investments.

E1 W **The New SLOG, by Erik Keller.** Yep, we just love acronyms. KISS, ERP, SAR. – now we can add SLOG to our three and four letter vocabulary, thanks to Erik Keller. Whereas the BIG FOUR (Microsoft, IBM, SAP, and Oracle) are still talking like the future is theirs and theirs alone, the SLOGS of the world are priming to strike hard and take away some of the market share. If you're looking for the latest trend in enterprise planning, think smaller, global, and SLOG. Now, let's get you up-to-date on who's up to bat!

E1 W **Just in Time Training? Using E-Learning Methods for JDE Training, by Pete Owens.** On-line training, delivered to the trainee's desktop, that provides the same interaction and information that a live workshop does? As new technology sprouts up each day, the reality of e-Learning makes it possible for those who can't afford the associated costs of off-site programs to receive the training they desire. This article takes a preliminary look at what e-Learning is and what it can provide for you. The article first appeared in April 2007 in SAPtips, our sister publication. We felt it was equally applicable to our JDEtips community.

E1 W **Training – the Kingpin of Better Use of Technology, by CJ Rhoads with Andy Klee.** CJ Rhoads and Andy Klee team up to give us their respective views on the value of ERP training – some pointers on how to get the best training available, when to do the training, how to budget – and **get** the budget, and much, much more.

E1 W **How to Quit Worrying About the ERP Graveyard, by Ned Lilly.** Are the days of hostile acquisitions in the software market coming to an end? Is it unlikely that he with the most toys in the end will win in the ERP world? Could be, thanks to SaaS and open source opportunities that are giving the bigger players a run for their money. Ned Lilly of The ERP Graveyard Blog joins us to give his assessment of what's the REAL next big thing in enterprise software. His thoughts may surprise you!

E1 W **Picking Your Pain Points, by Erik Keller, Wapiti LLC.** You can't treat pain unless you know where it hurts. When it's our body, we need to be able to tell the doctor if it's our knee or our head that's giving us grief. The same holds true for ERPs—you need to know where the pain is before you call in the "doctors". So Erik Keller is going to give you a brief "anatomy" lesson on ERP, to help you understand where the pain can come from when it comes to implementations and beyond. Just like our knees and heads, a little preventive maintenance and understanding of how they work (and how we can hurt them) will go a long way in avoiding these "pain points" in the future—or at least less reaching for the aspirin bottle!

E1 W **Five Steps to Keeping up with Technology, by Dr. CJ Rhoads.** What's tougher to keep up with than stock market fluctuations (or even who's married to whom in Hollywood)? Our ever changing world of technology, that's what! Why it's so difficult and how we can learn to keep abreast of the latest technologies without overtaxing our brains is the focus of Dr. CJ Rhoads' column in this issue. She's got some secrets to share, so listen up!

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E1 W **Operational Innovation through Inventory Management, by Erik Keller.** Think inventory management is just about warehousing finished goods? Or that it's only for tracking supplies, from raw production materials to pens and pencils in the office supply cabinet? Looks like it's time to add IT to the list of "inventory" we need to take stock of—which is not quite as easy as it seems. Sure, you can count all the computers and servers you have. But what about software licenses, maintenance agreements and many of the major expenses that go with IT? Can you add them all up and give an accurate total as to what's vital to your business and what's a waste? Erik Keller has a few thoughts on why you may want to consider taking stock of your IT inventory and offers some thoughts on how to make the process as "lean and mean" as your resulting IT organization needs to be..

E1 W **Vendor Partnerships: How To Make a Good One, by Dr. CJ. Rhoads.** What's in a vendor relationship? Is it a true partnership? Or is it a customer serving as an unwitting source of income for a company whose interests lie in sales, sales, sales—but never service? Dr. CJ Rhoads has been on both ends of the vendor world and is back to give us the 411 on what to look for in good vendors, the warning signs of when to stay clear, and, of course, how to make a vendor partnership one in which everyone profits!

E1 W **Where's the ROI? Optimizing Your Investment in ERP Technology, by Eric Kimberling.** Do ERP systems always meet the high expectations of the companies that implement them? Do the benefits attained exceed the costs? More often than not, the answer is "NO." And, we'll give you a hint: it's not the software; technology is only as good as those who utilize it. In fact, you can tweak it, add all the updates available, and tell everyone how to use it—but the glaring reality is, if no one understands WHAT you're trying to achieve and WHY, your investment has just become a waste of resources. Eric Kimberling specializes in helping companies realize the benefits of ERP software, particularly those companies which have already gone live. His approach looks beyond the technology, and delves into the real drivers of ERP success. Read on as he presents his key steps and a case study illustrating how it can work for your company, too.

E1 W **Technology Paradise Lost: Two Years Later, by Erik Keller.** It's been over two years since the release of Erik Keller's book, "Technology Paradise Lost." A prophetic look into IT spending, his book focused on the bloat found in most IT budgets and how some well-thought out eliminations could lead to more funding for business growth. Companies who took that initiative were rewarded with healthier bottom lines. But other questions still remained. Would companies take this to heart? Or would the resistance against "giving an inch" of entitled funding take the lead? We recently caught up with Keller, former Gartner fellow, The Software Critic blogger, and principal of Wapiti LLC, to see what he's discovered since his book hit the shelves, including what impact it's had on the IT world and what the next few years might bring to enterprise software.

E1 W **Calculating Technology Risk: How Much Can you Afford?, by Dr. CJ Rhoads.** What are the risk factors of your next technology project? Can it be determined like insurance ratings or credit scores? Maybe so, according to CJ Rhoads' calculations. As the technology world grows at an enormous pace, more and more of the factors that determine a project's success (or impending doom) are revealed. Before you spend your first dollar on your next project, why not see if the numbers add up with CJ's formula?

E1 W **Using IT Entitlement Payments to Fund Business Innovation, by Erik Keller.** How do you spend your IT budgets? Let Erik Keller count the ways. There's so much bloat in vendor maintenance contracts, unnecessary upgrades, and the desire to buy the latest techno-gizmo that a quick examination of IT spending can reveal a lot of $$$ that can be spent on more profitable opportunities. So, Ready, Set, Review!

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E1 W **Decisions, Decisions! Five Things CIOs Often Forget, by Dr. CJ Rhoads.** When you've finally reached the top of the summit, it's easy to forget all the things you saw, and did, to get there. So, as a refresher "course," Dr. CJ Rhoads shares her vast knowledge once more to give us a ground-eye view of the things often not "seen" from up high, and some common sense reminders that can take any IT leader from good to great when it comes to decision making. After reading this article, you'll see why she teaches IT Management courses for JDEtips!

E1 W **The Shifting Sands of Business Applications, by Vinnie Mirchanandi.** Blink and you may miss today's change in business applications. It seems as though what was spanking new and hot just yesterday is almost obsolete today, and maybe gone tomorrow if some predictions are correct. The business world, in particular, is ready to explode with new service-related software---and it's not just from the players you know: there's some new blood out on the field, ready to hit their home runs! So, are you ready for a glimpse into the future of business applications? (Even Larry Ellison may have spoken too soon!)

E1 W **The Confessions of a (formerly) Spoiled CIO, by John Zarb.** Well, if honesty is refreshing, this article is a tall, frosty beverage like no other! John Zarb shares with us all the "low down" on his former life as a corporate CIO. . .the perks, the pleasures, and the harsh realities of the business world he's rediscovering after a year on his own. His appreciation of the opportunities he passed, the great staff he had, and lessons learned and unlearned (until the hard way) are a great eye-opener for anyone at the top (or just aspiring to be!).

E1 W **Stretching Out Maintenance, by CJ Rhoads.** Those of you who've been reading JDEtips for a while know that one of our central themes is helping you get more out of your current investment in JD Edwards software. That means extending the typical ERP Life Cycle beyond the usual 10-15 years. If you read this article, we promise that your eyes will be opened wide at the fact-based opinions expressed here!

E1 W **The Rise, Fall and Ultimate Renaissance of IT (An unscientific, but clearly controversial, view from a gray-haired practitioner), by John Zarb, Itinerant CIO**. How about a trip down memory lane? A peek into the future? Or what's happening now? Some of each? John Zarb provides some terrific insight into the various phases (and faces) of IT over the years and gives us some darned good inspiration to keep moving forward and succeed!

E1 W **Getting Value to the Max, by CJ Rhoads**. We've invited Dr. CJ Rhoads to lend us her expertise in getting the most from your ERP investment. She'll be examining the various stages of the ERP Lifecycle in the next several issues. She'll be touching on such issues as maintenance, vendor relationships, technology investment, and more. In this first article, she introduces the "Refine and Align" concept, which we like so much we wish we'd coined the phrase. She reminds us that it isn't over when it's over… we must continue to monitor our ERP implementation even years after it is "done".

W **Documentation…The Job We Love to Hate, by Andrew Drummond.** Impossible! A ratio of one hour of training development time for each hour of training?!?!? We would not have believed it unless we had read Andrew Drummond's article that shows us how to optimize your task-based training development by using the JDE Documentation Tool as a base. Mine this wealth of information – it is already there, so why not use it?

E1 W **Oracle's Con-Fusion, by Jim Zimmermann, Editor and Founder, Techra LLC.** Jim Zimmerman runs a cool website that highlights the views of all the ERP analyst sites -- Gartner, Forrester, AMR Research, etc. With his access to all the analysts, we thought it a good idea to ask him to help us make sense of all the "news" swirling around Oracle's Project Fusion.

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Beyond ERP Vendor Maintenance Lie Savings Opportunities, by John A. Zarb, ITinerantCIO. John Zarb is a former CIO of a large JD Edwards customer, and he shares lessons learned with our readers. One big lesson learned is to take a hard look at what it really costs you to maintain your ERP system. For John's first article on vendor maintenance, please see "ERP Software Support – Is it all that it's cracked up to be?" in the JDEtips Document Library. This was published in the July 2005 issue of JDEtips under the CIO Corner category.

EAI Quarterly Review: An Opinionated Roundup of the Biggest EAI News Stories of the Quarter, Compiled by Jon Reed, Managing Editor, SAPtips. We are sure you have noticed that in the past few issues of JDEtips, we have taken great pleasure in poking fun at buzzwords new and old. But this time, we are taking the subject a bit more seriously. Jon Reed, Managing Editor of our sister publication, SAPtips, gives us an analysis of some of the latest news bits he's come across of late. Food for thought for sure.

The Hidden ROI of Training: Training Grants, Tax Credits and Incentives, by Peter Green. We've mentioned several times that it is possible for your company to have its JD Edwards training paid for with State and/or Federal grants. In this article, Peter Green, "peels back a few layers of the onion" so you can see what is available. Instead of crying, we think you'll be smiling after you get your first grant.

Choosing Your Next ERP System: A New Paradigm for a New Time, by Bob Paley. As a regular reader of JDEtips, you are by now probably familiar with our Publisher – AKA Andy Klee – and his thoughts on the ERP evaluation and selection process in today's environment. We are pleased to present an "outside" point of view on this topic. Bob Paley has written an insightful piece on the process of evaluating, selecting, and paying for an ERP system. If you want to compare this with Andy's article, look in the JDEtips document library for *"The ERP Lifecycle: From Birth to Death and Birth Again"*, in the CIO Corner category.

ERP Software Support – is it all that it's cracked up to be?, By John A. Zarb. It's one thing to hear from us that it might be a good idea to switch to third-party support, but then of course, we might be suspected of being self-serving, given that we offer just such a solution. So we invited John Zarb, a highly experienced and qualified CIO, to explore the options you have when it comes time to renew that service contract. We think you will find John's comments quite helpful. Lots of excellent food for thought!

The ERP Life Cycle: From Birth to Death and Birth Again, by Andy Klee. Our esteemed JDEtips Publisher was recently asked to share his thoughts on the ERP product evaluation process. Well, if you know Andy like we know Andy… never at a loss to express his opinion. (But only when invited to do so, of course!) Seriously, though, with the ever-changing scenery among the ERP software providers, it is wise to be thinking about the life cycle and consider not only the "how" but also the "when" of making decisions about the fate of your ERP systems. With his usual flair, Andy walks us through the life cycle and provides some thoughtful tips along the way.

Making End-User Training and Ongoing Performance Support Work for You, Mary Darr and Bart Rhoten, Intelligo. End-User training and documentation are often afterthoughts to what is perceived to be the main thrusts of an ERP implementation. After all, the technical environment needs to work and the applications need to be setup properly before anything else can happen. However, we believe that the approach outlined by Mary and Bart will convince you that investing in quality JDE training and tools for end-users will make your project much more successful.

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E1 W CIO Corner - Selecting a Winning Implementation Team, Catherine Wallenmeyer, Klee Associates. JDEtips welcomes Catherine Wallenmeyer to the Associate Editorial team. Catherine has a strong background in managing JD Edwards projects, both as a client and as a consultant. She kicks off her series of articles on ERP Project management with the critical first step—selecting your Dream Team and defining the role of each team member. If you are contemplating a new project, this article is your key to starting down the path to success.

E1 W The Nine Most Common Mistakes Implementing JDE, Peter Workman, Gordian Naught Solutions. Even if you read nothing else before you start your JDE project, read this White Paper! Understand the true Total Cost of Ownership (TCO), know when to bring in resources, and when to establish project standards.

E1 W Issue Tracking During a JDE Implementation, Roger Wilkinson, Integrated Support & Consulting. Roger is an experienced project manager who has written up an excellent paper on how to track JDE issues through your internal helpdesk. If you've ever implemented any software (not just JDE), you know that issue tracking is a key part of any successful project.

E1 W Five Secrets of a Winning CRM Strategy, Harry Joiner, Reliable Growth. This should be required reading at every JDE customer location. Trying to justify the need for a CRM solution at your company? Learn the business end of CRM and how to cost justify the decision to implement a CRM solution.

E1 W The Softer Side of Business Process Improvement, Harry Joiner, Reliable Growth. The world of Business Process Improvement (BPI) can be a minefield of unintended consequences. For every action, there's often an equal and opposite reaction. Harry counsels CIOs that the key to managing a BPI initiative is to think holistically about the business and its software application portfolio—and to deeply involve the people whose jobs will be most affected. After all, there's nothing easier to sell people than their own ideas.

E1 W Indy Fortune 500 - Defining Your Driving Force, Harry Joiner, Reliable Growth. What's the likelihood of Honda engaging in a bitter price war with Ford or GM? The answer depends on how each company defines its driving force. This four page "CIO Corner" from the September issue of JD Edwards Tips dissects Michel Robert's Driving Force model of business strategy as it pertains to information technology.

E1 W The Ten Commandments of Change Management, Harry Joiner, Reliable Growth. Human beings fear what they don't understand and avoid what they fear. So it's no surprise that change management remains one of the primary barriers to business technology adoption. This 3-page CIO Corner from the November / December issue of JDEtips counsels change-embattled CIOs to be "hard on the issues and soft on the people" when integrating an ERP system.

E1 W How to SWOT Your Competition, Harry Joiner, Reliable Growth. The first installment of Harry's "CIO Corner", this article from July 2002 reviews the role of SWOT analysis in the integration of corporate strategy and information technology. The role of scenario planning is also discussed.

E1 W Project Team Software Training: The Right Way, by Steven Phillips. OK, so you're planning a JDE implementation or upgrade. The budget is looking rather large. Your first reaction is "Where do I cut? Training--oh yes, we can cut formal software training for the project team." Before you go that route, you'll want to read this article by Steven Phillips to understand the ramifications of leaving project team training on the side. Steven makes a strong case for why a penny saved up front can cost you much more in the long run.

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PeopleSoft Technology

PeopleSoft Application Designer: An Overview and Comparison with OneWorld's Toolset, by David Ratway, LNR Property, Inc. David is one of our PStips writers and has volunteered to help our JDE audience begin the process of understanding PeopleSoft. The PeopleSoft Application Designer is at the core of all application development. Through the Application Designer, all objects are created, organized into Projects and migrated across PeopleSoft environments. Additionally, developer access to objects and migrations are controlled, through a feature called Change Control, from the Application Designer. Like JD Edward's OneWorld Tools, the Application Designer facilitates all development work within PeopleSoft environment. This paper explains the basic organization and functionality of the Application Designer and, where appropriate, discusses similarities and differences between OneWorld Tools and the PeopleSoft toolset.

Introduction to the PeopleSoft Reporting Environment, PS Query and Reporting Options, by David Ratway, LNR Property, Inc. In this paper, David gives us a thorough overview of the PeopleSoft reporting environment. He covers creating, running, and purging reports. And he even discusses the relationship between Crystal Reports and PeopleSoft.

Integration Timeline with PeopleSoft, by Jean Driscoll, Holiday Retirement Corp. Jean is very active in her local Quest group and various Special Interest Groups. She's been able to attend several presentations by PeopleSoft on future product plans. It won't be long before the new terminology (PeopleSoft World and PeopleSoft EnterpriseOne) becomes a part of our natural discourse and a part of JDEtips. Here's Jean's up to the minute report on all the news affecting JDE clients.

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Real Estate Management

E1 W **Effective Rent Calculation, by Richard Berry**. While some US readers may already be familiar with the FASB13 module in JD Edwards® Real Estate, for JDEtips international clients, this tip may prove to be quite a treat! Richard Berry, our "Singapore" correspondent, writes how this module can be used quite nicely to calculate effective rent during rent free periods. So, if you're not familiar with FASB13 at all, or if you've only used it to calculate rental revenue where actual billings follow a stepped-rent progression, this article will be of great benefit to you!

E1 W **Tenant Sales Forecasting, by Richard Berry.** How can you forecast tenant sales in EnterpriseOne 8.11®? Let Richard Berry count the ways for you. There are seven methods for projecting sales over a several year period of time, plus a method for seasonality. So, if you're ready to plan ahead when it comes to tenant sales (without resorting to a crystal ball to see into your real estate future), Richard's here to walk you through the various methods, when you'll want to use them, and what information you'll need to get started.

E1 W **Real Estate Legal Clauses, by Richard Berry.** What's the difference between Legal Clauses and Lease Logs in the JD Edwards® Real Estate application? Depending on what information you're trying capture from rental agreements and other real estate legal documents, the answer is "a lot." Fortunately, Richard Berry is able to help by providing a detailed explanation of the features offered with Legal Clauses, introduced in version Xe, as well as side-by-side comparisons of how Clauses and Logs match up. This is a must-read for anyone looking to get the most from their Real Estate application!

E1 W **Tenant Rent Roll Report,** by **Richard L. Berry, S&I Business Applications.** Richard Berry provides the insight needed for Property Managers to thoroughly understand the Tenant Rent Roll Report. This report is indispensable in order for the manager to know the monthly fixed rent and to know if there were any changes in rental income compared with the previous period. Richard says that this report is quite sophisticated, but as is typical with reports, there isn't a whole lot of documentation on it. We think you'll find that Richard takes care of that problem very nicely, indeed. This article applies equally to WorldSoftware™ and OneWorld®.

E1 W **Lease Expiry Report, by Richard Berry, Klee Associates.** Richard continues his series of excellent articles on JDE's Real Estate Suite. Monitoring the expiry of leases is a crucial part of the property manager's job. It touches all parts of the organization, but it is of special concern to the leasing and marketing departments. It is essential to plan in advance for lease expiry and to take steps to fill any expected vacancy. Richard takes you through the setup of the report and reviews several examples of the output.

E1 **A/R Interest For Real Estate Users, by Richard Berry, Klee Associates.** In this white paper, Richard takes his article on A/R Interest from the May, 2003 issue of JDEtips and gives it a Real Estate spin. This combined with his previous article on Property Interest on Overdue Rent gives the reader an excellent summary of all available interest options in JDE.

E1 W **Property Interest on Overdue Rent, by Richard Berry, Klee Associates, Inc.** Richard is back with another detailed White Paper on Property Management. He says interest calculations generate more questions than any other feature in Property Management. Learn all the setup and advanced tips you need to successfully setup your interest policies.

E1 W **Security Deposits in Real Estate Management, by Richard Berry, Klee Associates, Inc.** Richard presents a detailed analysis of all the setup required to track Security Deposits in JDE. Along the way, he points out the differences between WorldSoftware and OneWorld. Learn how to define different deposit types, how to monitor and handle cash receipts, and even how to use this functionality to do installment sales.

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E1 W **Rent Projection, by Richard Berry, Klee Associates.** It is surprising how few Real Estate clients use Rent Projection. There is very little setup and generating projections is fairly simple. Find out more with this tip from Richard Berry, our Associate Editor for Real Estate

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Reporting, Query, and Business Intelligence

E1 W **Business Intelligence**, **by Dr. CJ Rhoads and Mike Lutito. (Webucation Event Recording).** So many metrics, so little time. How do you know which KPIs are the ones to use when designing your BI solution? Dr. Rhoads combines her academic and entrepreneurial experience to deliver solid, research-backed, business advice to guide your BI implementation.

Mike Lutito follows with highlights of Microstrategy's BI solution for JD Edwards World and EnterpriseOne. MicroStrategy, a global leader in (BI) technology, provides integrated reporting, analysis, and monitoring software that helps organizations make better business decisions.

E1 **Can the JD Edwards Reporting Tool Do it All?, by Penny Allen and Dave Hansel. (Webucation Event Recording)** Join Penny and Dave as they dispel the myths surrounding ERW, the EnterpriseOne report writing tool. Hear "the Facts not the Fiction" as you learn how ERW really works.

E1 **Current Trends Around the Use of the JD Edwards Report Writing Tool, by Penny Allen.** Penny Allen has been in the trenches with ERW as a consultant and as an instructor for many years; during that time, she's observed a great deal about how companies see JDE® reporting. As a primer for her Collaborate presentation this April, we asked Penny to share with us what she's been seeing and hearing regarding the way this tool is used, what people tend not to know about it, and how companies could be maximizing their use of ERW to improve their reporting capabilities.

E1 **Save Time by Using ERW to Report on Work Center Error Messages, by Ricky Cai.** The JDE® Employee Work Center offers a great feature that allows users to be notified by email of any error messages generated by batch jobs. The feature becomes not so great when there could be hundreds to thousands of error messages—all requiring drill down to multiple levels to see the root cause of the issue. In this article, Ricky Cai demonstrates how to create a customized report that gets down to the nitty gritty detail that you need, saving you time and effort.

E1 **How to Graph It in the Web Client, by Ricky Cai**. Here's some good news for all you graph and chart fans out there. As part of Tools Release 8.96, two new features—Text Block and Text Block Control—allow you to use Form Design Aid to create all the bar graphs, line graphs, and pie charts you and your end users want**.** Ricky Cai walks us through a demonstration of these powerful tools and how to create dashboards that will present critical business data in a much more meaningful, easier to interpret format.

E1 **Enhanced Bursting and Delivery with Embedded BI Publisher, by David Taverner.** In JDE® Land, there is quite a bit of excitement about the BI Publisher, which gives us the ability to create nicely-formatted reports and documents in XML format. But there is also some disappointment regarding the email report distribution functionality. While Oracle® is planning enhancements around this, David Taverner has devised an interim solution, using some tools provided by Oracle and some custom coding. You'll have to roll up your sleeves, but it can be done – and David already did the thinking. If you want a good solid overview of BI Publisher, please download JDEtips article, "Integrated BI Publisher for EnterpriseOne®" from the JDEtips Document Library (Nov. 2009) by Scott Beebe.

E1 **Integrated BI Publisher for EnterpriseOne®, by Scott Beebe, Worldwide Software.** At JDEtips, we've been receiving a lot of requests for a good article on BI Publisher—and we're thrilled to be able to deliver it to you courtesy of Scott Beebe. Scott presents a comprehensive overview of this report formatting solution. Included in this article are the steps to creating templates and report definitions, getting data, and submitting reports. Scott wraps it up with report distribution tips, and, as always, the "gotchas" you won't find in the book.

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E1 **Enterprise Report Writing: Subtotaling with the Tabular Section, by Penny Allen.** So, you're using Enterprise Report Writer, and you want to subtotal in a tabular section. Seems simple enough, but is it really? As Penny Allen notes, "ease" in JDE® report writing only happens once you fully understand the dynamics involved. And with tabular sections, there's more than meets the eye. Penny demonstrates how tabular sections interact within the report and the best practices you'll want to follow in order to achieve the correct report output.

E1 **Financial Report Writing: The Limitations, Gotchas, and Workarounds!, by Penny Allen.** In the January 2009 issue of JDEtips, our ERW guru Penny Allen presented a very detailed overview of Financial Report Writing in EnterpriseOne®. Now, read as Penny shares the workarounds she discovered the hard way, including row specs definitions with level break objects, changes to a report template that don't "push down", zero row suppression, and Drill Down setups.

W **WorldWriter Report Searches with SQL, by Rick Snell.** Somewhere, in your vast archives of WorldWriter reports, is the report for which you've been searching. Maybe it's something you created a long time ago and want to resurrect for a current project. Or maybe it's a calculation that needs to be fixed on multiple reports. Or perhaps you just want to see which reports look at what files. In this article, Rick demonstrates how to quickly pull up reports for which you might otherwise spend hours digging around.

E1 **Financial Report Writing with EnterpriseOne®, by Penny Allen.** How are financial reports in JD Edwards® different from other reports? This is one of the many questions that JDEtips University's ERW instructor Penny Allen comes across during her classes. Fact is, the details of Financial Report creation allude many JDE® users, which inspired Penny to take us step by step through the process. In this article, Penny addresses key topics such as properties of the tabular section, smart fields, using the Financial Application Wizard, and much more. So, if financial reports in EnterpriseOne have been a mystery to you—read this article and consider this case "solved!"

W **World Writer Sets and Eliminating the Redundant, by Rick Snell.** It's always a shame to see robust functionality left ignored because people find it intimidating. That's often the case with World Writer, according to Rick Snell. It's big and it's not well understood. Rick hopes to help diminish some of that trepidation by explaining how World Writer looks at data by using the mathematical concept of sets and subsets – including an in depth look at Summary Functions. Then he'll demonstrate how you can create a cleaner report by using headers and footers to remove "clutter" so that you can add more vital information onto one report.

W **World Menu System Tips, by Rick Snell.** There's gold hidden within your JD Edwards® World menu system. OK—maybe not the $800 per ounce variety. But there is a wealth of information in there, just waiting for you to tap in and discover. Rick Snell demonstrates how to use three key files—F0082 (Menu Master), F00821 (Menu Selections), and F0082H (Menu Selection History)—to do such tasks as determine sources of Address Book revisions, find security holes in menu masks, set security criteria for DreamWriter users, develop test scripts, and much more.

E1 **Integrating Crystal Reports with EnterpriseOne®: Turn the Sky Crystal Clear, by Andy Vanspranghe.** Have you ever allocated a small amount of time to a task, thinking it would be a piece of cake, only to discover that it's anything but? Some things aren't quite as easy as they would appear they should be; integrating Business Objects' Crystal Reports with JD Edwards® EnterpriseOne is a perfect example. Sure, there are guidelines and manuals that provide "setup instructions". But, as Andy Vanspranghe discovered, those manuals leave out a few key details that can mean the difference between a smooth installation and hair-pulling frustration. Andy is more than happy to share with you the little "gotchas" he learned, the hard way of course, in hopes that your experiences with Crystal Reports will be much clearer.

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E1 **Beating the Business Function Blues, by Penny Allen.** It's no surprise that with over 10,000 business functions in EnterpriseOne® 8.12, and yet only a handful documented, working with business functions can bewilder even seasoned developers. Penny Allen, our ERW guru, has encountered this issue numerous times, and has helped clients find their way around business functions (BSFN). Therefore, based on her Collaborate 08 presentation, Penny has assembled this handy tutorial for us, complete with a behind-the scenes look at BSFNs to help de-mystify the process. Use this the next time you encounter a BSFN of the undocumented variety, and you just may be able to figure out that elusive mapping. A full PowerPoint of this presentation is available for download in the JDEtips Document Library, under the Collaborate 08 category.

W **DIY Forms Kick It Up a Notch, by Steve Kriegel.** Don't you love when someone says"free" and it really is FREE? Steve Kriegel demonstrates the ten easy steps to create form overlays, a simple way to insert company logos and other graphics onto an AS/400 spool file that can be tied into JD Edwards® – without purchasing expensive software! This technique will provide your reports and forms with a customized, professional look! Read this article, based on Steve's Collaborate 08 presentation, and let your creative side be free!

E1 **Creating a Separate PDF for Every Invoice, by Cezary Dadura.** So, you've got a bunch of sales order that you need to invoice. You go ahead and run invoice print. But, what do you get? One big PDF file with all of the invoices. Not exactly practical since you'll probably need to send individual PDFs to various customers via email or fax. You really need a separate PDF for each invoice. Does this mean you'll have to run a separate report for each one? Not necessary, says JDEtips newcomer Cezary Dadura. Cezary shows us how to use Report Design Aid and a custom process to get the results we want from JD Edwards.

W **World Writer Tips, by Jeff Babcock.** Looking for some tricks that are really treats this Halloween? JDEtips newcomer Jeff Babcock has reached into his World Writer goody-bag and scared up some great tips to make your reporting experiences less spooky. Whether you're afraid of the dreaded "divide by zero", always jump when you have to calculate days between dates, or totally frightened by using non-JDE reports in World Writer—Jeff takes the fear and frustration out of these and other common reporting problems (so you'll be less likely to want to TP someone's house the next time you get handed a last minute report request!)

E1 **Using Microsoft Excel, Pivot Tables, and Microsoft Query for Reporting, by Brian Gilbert.** Reports Presto? Yes, you can, says new contributor Brian Gilbert. By combining Microsoft Excel's pivot tables along with Microsoft Query, you, too, can simply and quickly generate reports at the drop of a hat (or last minute request from a top exec!) Better than step by step, Brian takes you screen by screen through the setup for this powerful combo.

E1 **SQL Report Services with EnterpriseOne, by Marty Resnick.** Not ready to spend loads of time and money on a reporting tool? Take a look at Microsoft's SQL Server Reporting Services product. Won't cost you extra if you are using SQL Server anyway, and it's a very straightforward reporting tool. You will of course need some knowledge of your JDE data structures, but if you know how to create a report in Access, you will find this quite similar. If you've never looked into this tool, take a few moments for this quick tour.

E1 **FASTR Conversion Tool - A Cautionary Tale, by Susan Stooksberry.** There's nothing like experience to teach us life's important lessons… such as when a short cut winds up being the longer route, or in this case, when a time-saving conversion tool might not save us so much time, after all. Susan Stooksberry has gone down the path and felt the pain of converting reports from World to EnterpriseOne® 's ERW using the FASTR conversion tool. Read this article and decide for yourself whether this converter will be a debit or a credit in your migration from World to EnterpriseOne.

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E1 **Handling EnterpriseOne Julian Dates and Numbers in Crystal Reports, By Marty Resnick.** What if you asked what day it was, and someone told you it was 105003. Huh? Well, technically, that's correct, but it isn't very user-friendly at first glance, is it? That's the Julian date for January 3, 2005, and that's the way EnterpriseOne® stores dates. Within the EnterpriseOne applications, the dates are twisted around and presented to us in our usual format, but when you want to use a good third-party reporting too—Crystal Reports in this case—you have to teach that tool how to make the translation. Marty Resnick shares with us how to make that happen.

E1 W **Information Repository Utilizing SQL's DTS with JD Edwards: How We Did Data Warehousing Without Breaking the Bank (or our implementation schedule), by Sharon Petrella, Maja Mitrovic, and Joel Foote, Dealer Tire.** Data Warehousing and Business Intelligence are hot buzzwords these days. Instead of buying a packaged solution, Dealer Tire took a different path – using technologies that were already in place, they came up with an economic solution with high ROI. Learn how this client implemented a new secured, self-service information repository on time and under budget.

E1 **Joining On a Union – An Incredible Development Tool for Sales Reporting and Application Design, David Johnson.** David demonstrates how a little determination and creativity can get you through obstacles that may daunt the less adventurous. Here we learn not only the basics of database joins and unions, but also how to combine the two techniques to create your own “virtual table” to get the data you really need on your Sales reports. These techniques give you tremendous flexibility and improved performance over traditional methods such as Table I/O. Don't be shy, give a copy of this to your technical folks so that they can implement this! Or even better, get them on your company's unlimited subscription!

E1 ***TODAY Data Selection in OneWorld, by Boris Goldenberg.** We want our *TODAY! For those of you on OneWorld who used to be on WorldSoftware™, you probably have noticed that *TODAY disappeared in OneWorld®. Gosh, that was an incredibly useful function and we want it back! Never fear, Boris Goldenberg has the answer. For those of you who are wondering what all the fuss is about, *TODAY allows WorldSoftware clients to tell the system to use today's date for data selection, or today's date minus a fixed number of days. This is incredibly useful when you need a date or date range sensitive report but don’t want users having to go in and change data selection criteria every day.

E1 **Soft Coding Smart Field Column Headings, Dan Marsh, The Dan Marsh Group.** Another winner from Doctor Dan, the Financials Man! This is a great tip—it will save you a lot of time changing Financial Report column headings, especially when the year changes, and you want your reports to reflect the current year in the title. In the true JDEtips style, Dan takes you through every step in detail. One of our most popular and useful Financials tips, ever!

E1 **Tips on OneWorld Financial Reporting, Randall Foust, CD Group.** Benefit from this author's eight years experience writing Financial Reports with JDE's software. Read these before you sweat the details on your critical reports.

W **Segregating DREAMWriters, Bob Bloomquist, Kokosing Construction.** Have you ever looked at a list of DREAMWriter Versions and wondered, "How do they keep all these versions straight? How do they know which ones to run, and when?" Bob Bloomquist, a WorldSoftware client, has an excellent technique that cuts down on the confusion. This technique also resolves issues about who is allowed to change and execute which versions of a DREAMWriter.

E1 **Understanding Data Selection Processing in OneWorld, Scott Beebe, AMX International.** Data Selection? No problem, right? Fine, but if you aren't getting the results you expect, read this tip from Scott Beebe. You'll be surprised at how these subtle tips will help increase your efficiency in using designing reports. This white paper has proved very popular with Scott's clients and JDEtips readers.

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W **WorldWriter Basics, Marty Burns, CD Group.** For WorldSoftware clients only. If you are new to WorldWriter, this White Paper will get you going in the right direction--you'll quickly be able to create your own reports.

E1 W **Business Intelligence Issue of JDEtips, Klee Associates.** A great introduction to this topic. The BI overview article presents a vendor-independent view of how BI can help an organization achieve its goals. Several useful checklists for Vendor Selection and Project Management are also included.

E1 W **Linking Tables With Crystal Reports, Adam Crigger, Preferred Strategies.** Learn the basics of different types of joins when linking files with Crystal Reports. This is a sample chapter from Adam's JDE/Crystal Reports Workshop Manual. Adam has 4 years experience helping JDE clients use Crystal Reports.

E1 W **Inserting a Chart Into a Crystal Report, Adam Crigger, Preferred Strategies.** For the hundreds of JDE clients who use Crystal Reports, another good tip from our Crystal partner. In just five simple steps you can enhance your reports with charts.

E1 W **Crystal Reports – Group On One Field But Report On Another, Adam Crigger, Preferred Strategies.** For those of you who have decided to use Crystal Reports as your end-user reporting tool, Adam has another excellent tip. Here, he explains how to group on one field, but display the value of another field. For example, group on Business Unit, but print the description on the report.

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Sarbanes-Oxley

E1 W **The Keys to Sarbanes-Oxley Compliance: A Special "Round-Table" with Four Compliance Experts, by Jon Reed.** JDEtips invited Jon Reed, Managing Editor of our sister publication, SAPtips, to interview Klee Associates' Sarbox Director David Ashley, Quaker Chemical Q1W Core Team Member and JDE SOX specialist Nadine Alexander, , SAP Technical Compliance Manager Ken Asher, and SAP-HR Compliance Manager Greg Robinette. This round-table discussion spans the technology and logistics of accomplishing SOX compliance. We thing you will both learn from and enjoy the thoughts put forth here.

E1 W **Segregation of Duties to Comply with Sarbanes-Oxley Requirements, by Laura Jackson.** Laura Jackson reports on her recent engagement with Hamilton Sundstrand to identify employees who have access to programs that create a potential conflict of interest. For example, an employee should not be able to enter a voucher *and* cut a check. The covered Financials, Distribution, and Manufacturing, and used a combination of technical and non-technical methods of discovery and analysis. Hamilton Sundstrand agreed to let Laura share the discovery process with our readers.

E1 W **Challenges and Advantages for Users of PeopleSoft World and EnterpriseOne Software in Meeting Sarbanes-Oxley Compliance, by David Ashley, CISA, CISM.** It isn't all that hard to find information about Sarbanes-Oxley. Do a Web search, and stand back! You could be overwhelmed. David Ashley has been there and done that and survived to tell about it. In this article, he does just that – he boils much of the legalese into language we can digest and gives us advice and pointers for beginning our own compliance efforts – all based on his personal experience in "SOX" compliance projects.

E1 W **FINANCIALS – Sarbanes-Oxley Compliance Tools: Help or Hype? by Eric Krell.** We've been aware of the Sarbanes-Oxley Act for quite some time. Some of you are probably already working on an internal SOX compliance project. Eric's article marks the first in a series on the impact these new regulations will have on our readers.

E1 W **Principles of Software Validation and 21 CFR Part 11 Compliance, by Daniel Bolland and Justin Miller.** This article brings us a dual perspective on how PeopleSoft Enterprise One addresses the ever-increasing requirements for accountability in our enterprise applications. The article discusses the regulations for both automated and manual procedures and gives us an introduction to the mechanics of Audit Management features. While primarily directed toward EnterpriseOne, some of the capabilities are also available in World, and the principles certainly apply. The information in this article is also valuable when considering the Sarbanes-Oxley requirements.

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Service and Contract Billing

E1 W **Service Billing Workfile Transactions – Hints and Tips, By Davine Walsh.** Five Tips in one! We won't complain about that! Davine Walsh has come up with some cool tips for making your Service Billing Workfile work for you instead of the other way around. She makes it look so easy, it's almost like cheating, but as she points out, these workarounds and lesser-known techniques are great time-savers, while still being fully auditable. The techniques Davine describes work the same for World® and EnterpriseOne®.

E1 W **Service & Contract Billing Overview, Richard Berry, Klee Associates, Inc.** This 23 page overview is a must-read for many clients. Service/Contract Billing isn't just for services and project firms these days. Many other types of firms can benefit by using these modules for service and warranty work on what they sell.

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Technical

E1 **Installing the EnterpriseOne 9.1 Standalone Demo – Confessions of an Applications Guy, by Russ Bartunek.** Can an applications guru take on the challenge of a solo EnterpriseOne® 9.1 standalone demo install? Distribution expert Russ Bartunek did--and lived to tell about it. Russ shares the process he used, the detours he encountered, and how he got back on track to a successful installation on his laptop. This article is extremely likely to save you many hours of frustration, trying to install the demo.

E1 **The ABCs of Enterprise Hosting (Webucation recording and PowerPoint), by Mark Goedde.** We've all heard about "the cloud" but what the heck is it? Learn how a cloud-based infrastructure, along with Enterprise hosting, managed services, and SaaS, can save your team time and money when it comes to running JD Edwards.

E1 **Enforcing Hierarchical Category Codes, by Mike Wright.** From DeMartino to Klee to Wright—no, this isn't the next famous double play combination, but it does describe how this tip came to be. Andy Klee, our publisher, was looking for some "hidden gems" to share with JDE audiences, and called Bob DeMartino, one of our ace JDE® Financials consultants a few months ago. Bob mentioned Hierarchical Category Codes, and even though it could only be enforced via post-setup reporting, Andy took it and ran with it. All the way to Mike's inbox, and Mike (our favorite EnterpriseOne® developer), agreed to write up the concept and even developed the source code for enforcing the concept during setup.

E1 **Enabling MS Visual C++ IntelliSense when Working with JDE Business Functions, by Brian Oster.** IntelliSense: The name alone should pique your desire to learn more about what this powerful Visual C++ feature has to offer. In this article, Brian Oster details what you need to know about IntelliSense, how to configure it to work with JDE, and how to use it when working with JD Edwards® business functions, including how to create your VC++ Makefile Project and adding BSFN source files. And of course, he provides plenty of tips and gotchas along the way to help make your job much easier.

E1 **JDE® Tables: Going Behind the Screens, by Andy Vanspranghe.** If you're the type who loves to know "how things work"—this article by Andy Vanspranghe is a treat. Andy takes us on a backstage tour of JDE including the database and tables that drive what you see in front of you. From the Data Dictionary, to Table Names, to Columns and Aliases, to Oracle® Metadata queries, Andy covers the basics that any new JDE client should appreciate.

E1 **Red Stack vs. Blue Stack: A Fairly Detailed Overview of Oracle Technology Foundation for JD Edwards EnterpriseOne, by Charles Anderson.** Are you a Red Stack or Blue Stack EnterpriseOne user? No, we are not asking a loaded political question here…but we are setting the stage for an extremely informative article by Charles Anderson on Fusion Middleware. Charles shares with us a candid perspective on this up and coming technology from Oracle. If you are considering deploying Fusion Middleware, this is the article you've been waiting for.

E1 **Using Variable File Names in a Table Conversion, by Paul Hanson.** Looking for some flexibility when it comes to Table Conversion flat file names? How about flexibility along with control? Add in ease of use, and we just can't imagine how life could get better (well, if you are into that sort of thing, anyhow). Welcome back Paul Hanson, who offers up his solution for entering variable file names for your table conversions. As always, Paul shows us how to save time and $$ with a simple, clean solution.

E1 W **Z File Processing Explained, by Paul Hanson.** Looking for the "Z" in "EZ"? Paul Hanson continues his quest to simplify JD Edwards for your technical staff. This issue, he presents a case for the Z-file process that already exists in both EnterpriseOne or World. With his overview and real-life example, Paul shows how this interface can make transferring data between an external system and JD Edwards a lot "EZ-er" than you think! Better yet, it uses a process already available in the system!

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E1 **Minimize F0911 Record Creation, by Lina Hadi.** That first year with JD Edwards can produce some level of discomfort as users and IT alike try to work out the "kinks." So, it's not a complete surprise when departments try to keep as much detail as possible with each transaction. The only problem is, after a while, files get bigger and bigger—F0911 becoming one of the largest. And with bigger files, of course, comes system slow downs. Lina Hadi understands that, and offers some tips on how to minimize F0911 record creations during that crucial first year, while still having access to the details when needed.

E1 W **I5/OS V5R4 Announcement, by Glenn Robinson.** We've got the scoop straight from source! Glenn Robinson fills us in on the latest release of i5/OS—after of course he's given it his own "test drive" and learned the ins and outs of what makes it tick, what makes it great (and what he thinks could use a bit of enhancement). So, without further ado, here's what you need to know about V5R4!

E1 **Accessing the Data in the JDE Standalone Demo Version, by Ted Aseltine.** So, what you really need is your own "island" in which to access tables and experiment with data: without disrupting the rest of the network (and risk getting "voted" off the bigger corporate "island.") Think that's an impossible dream? Ted Aseltine shares his know-how on how to do just that by accessing JDE Standalone data through Microsoft Access. Before you know it, you, too, will be able to test away on your own little standalone "island" worry-free (palm trees and umbrella drinks optional).

E1 W **Data Conversion Overview, by Kirby Rankin.** When the project manager asks for volunteers to head up the data conversion project, it's amazing how many people have urgent plans to be elsewhere during that time – even before they know the dates! But once you get your hands on this article, you'll be the first to step up to the plate, because you'll be fully armed with the tools to make and execute a solid conversion plan.

E1 W **JDE Julian Dates and a Tribute to Johnny Carson, by Kevin Montgomery.** Well, it looks as if we are going to have to establish a new category for the JDEtips Document Library. We considered running this as our humor piece, but it has so much good technical information in it, we couldn't quite see that. Can't go in World Technical, because it's applicable to both World and EnterpriseOne. So, you will just have to decide for yourself whether to read this for a good laugh or to read it for the last word on the JDE Julian Date conundrum.

E1 **P80010 Table Columns Browse – Interactive Application for Viewing and Exporting Table Definitions (File Layouts), by Susan Stooksberry.** If you are a regular reader of JDEtips (of course you are!), you have become accustomed to Susan Stooksberry's fine articles in the Financials area. Well, Susan is no mere number-cruncher, as you will see in this article about a little-known tool, P80010, that will save you time while giving you access to information you may not have otherwise. Our Senior Technical Editor declared it "awesome!", and we think you will, too.

E1 **Adding Signatures and Other Graphics to EntepriseOne UBE Output, by Paul Hanson.** What a concept! Do it cheaper, better, faster? Paul Hanson shows us the way to add signatures and other graphics to EnterpriseOne® documents by using a $200 tool and some imagination. If you've been experiencing sticker-shock while researching ways to do this, you must not miss this sweet solution. Why spend thousands of dollars on add-on software, if you don't have to. This article by our Senior Technical Editor is destined to become a JDEtips classic!

E1 **Configuring a Citrix Server for Remote Development by Multiple Users, by Kenneth Wong.** We all know that you can only do development work (including using the ERW) on a fat client, right? Wrong! This article is a huge time and money saver! Think about all the packages you don't have to deploy to non-existent fat clients, and as Kenneth points out, all the money saved in unnecessary consultant travel while doing heads down development work.

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Using DB Monitor to Create Advised Indexes, by Jean Driscoll. In the quest for performance tuning, there are many twists and turns along the way. Jean Driscoll takes this opportunity to straighten the road a bit by teaching us how to use IBM's DB Monitor to find out where we should build indexes to speed data access.

JDE.INI Setting – InstallERSpecs, Mike Wright, Werner Co. JD Edwards is constantly adding new functions to help with system performance. But somehow the news of the changes and how they are implemented doesn't always get enough publicity. Here's a tip on how to benefit from one of those lost treasures—a relatively new jde.ini setting that can improve performance of batch jobs on the enterprise server.

Understanding the OneWorld Table Conversion Tool, Angela T. Freeman. Angela does a nice job of leading us through the basics of the OneWorld Conversion Tool. Step-by-step, every screen shot is included.

Documenting Processing Options and Data Selection, Ralf Hanekamp, CGEY. How to print processing options and data selection in OneWorld. This doesn't always work if your language is not English. Find out how to do it, here.

EnterpriseOne 9.1 User Interface, By Lea Dutton. The new EnterpriseOne 9.1 User Interface ("UI" to those in the know) gives E1 a more modern look and feel, and includes many helpful features. Lea Dutton has quickly become our 9.1 UI specialist, teaching our Common Foundation classes, and advising our 9.1 UI eLearning team. Destined to become our most downloaded article ever, Lea covers every significant enhancement to the 9.1 User Interface.

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Technical - CNC

E1 EnterpriseOne 9.0 Standalone Demo Install Outline as of February 2011, by Tim Ene. In July of 2009, we published a piece by Tim Ene telling us all about how to install the E1 9.0 standalone demo. Well, time passes, the world changes, and Oracle changes with it. Turns out the instructions we originally published no longer stand. So here's how it works in 2011.

E1 How to Easily View EnterpriseOne® Scheduler Details in Date/Time Format, By Mike Wright. Searching Job Scheduler for entries based on a date does not come standard with the package because date and time are stored in UTC format. Mike Wright offers a solution that involves building a custom table to store all the entries with the dates and times converted into a familiar format. In this article, Mike describes the steps needed to create this table, including the batch process for date/time conversion, plus an inquiry application to select and view the resulting data.

E1 EnterpriseOne® CNC Changes Since Xe®, by Mike Wright. So you're making the switch from Xe to 9.0. There are lots of years between these versions, so what should you expect from a change perspective, especially if you're tasked with CNC duties? Mike Wright has had the pleasure of evaluating release 9.0 in a pristine environment and detailed what differences he discovered in areas near and dear to a techie's heart: Logging, Batch Jobs, Security, Data Browsing, Grid Formats, and Cache.

E1 Xe® to 8.12 System Administration Net Change, by Gregg Larkin. The more things change, the more they stay the same? Not necessarily—at least not when it comes to EnterpriseOne® 8.12 and 9.0. While there are many areas of these newer versions that are similar to Xe, if your company is about to transition, you'll want to read this net change primer by Gregg Larkin. He details what's changed in the developer's fat client, menu management, application security, and more.

E1 Scheduler and Submitted Jobs Reports, by Mike Wright. Need an easier way to monitor jobs in your system, but find the reports available present too much information? Mike Wright has been there, done that, and figured out a work around that allows you to review just what you need to see when it comes to Scheduler and submitted jobs reports based on status. Mike presents a customized view that doesn't require extensive custom code.

E1 How to Succeed at the EnterpriseOne® 9.0 Standalone Install Without Really Trying, by Tim Ene. Still standing after an EnterpriseOne 8.12 standalone install? We know, it wasn't exactly a piece of cake. But the good news is, we can make your life easier with the 9.0 install, thanks to this tip submitted by Tim Ene. Mind you, we're making a bit of a caveat in that some issues, such as download manager, other operating systems, etc., are not addressed. Nevertheless, you'll appreciate the value of this tip.

And a JDEtip of the hat to Rich Schram, who put this procedure through its paces, and had this to say: "All in all, I'm really amazed at the ease of using your tip sheet –a really good experience, and I wouldn't have been able to get as far as I did, in the time span I did it in, without it!" Thanks, Rich.

E1 Oracle Single Sign-On for JD Edwards EnterpriseOne: Part III. Enabling Oracle Single Sign-On with JAS Server, by Charles Anderson. Charles Anderson has presented us with the key steps of Single Sign-On, including a standalone install of an OAS Infrastructure "Home", and the integration of Oracle Internet Directory with the Microsoft Active Directory. In this final article of the series, Charles takes us through the final steps to point a single JD Edwards EnterpriseOne JAS instance to the Oracle Single Sign-On server and validate successful logins using your Active Directory credentials.

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E1 Easy Integration of External Data into EnterpriseOne® UBEs and Applications, by Paul Hanson
If you're a developer in a small JD Edwards® shop, without a dedicated CNC resource, we've got a tip to make your life easier when it comes to integrating external data. Paul Hanson outlines a solution that offers a more robust integration as an alternative to table conversion UBEs and other "old school" methods. Let Paul show you his techniques for accessing external data sources and you too can cut out the middleman.

E1 Cost Saving Tips for CNCs, by Mike Wright. It's a fact with today's economy— we're all expected to do more with less. Less resources, less staff, less time… and yet more work. Mike Wright understands, so he's picked a few of his favorite tips on how to save time and money by improving EnterpriseOne® processes and performance, and put them into this article. You may be surprised at where you can tighten the proverbial belt just poking around EnterpriseOne.

E1 Oracle® Single Sign-On for JD Edwards® EnterpriseOne®: Part II, Oracle Internet Directory Integration with Microsoft Active Directory, by Charles Anderson. Charles Anderson continues his three part series on Oracle Single Sign-On. Last issue covered the installation of OAS Infrastructure and establishment of the initial Oracle Identity Management realm. This time, we'll discuss the configuration of this complex setup, including the Oracle Directory Integration and Provisioning (DIP) configuration.

E1 Configuring eGenerator, by Carlos Sebaaly. Stumped on how to configure the eGenerator? Take heart. Carlos Sebaaly delves into the steps needed to configure this tool in order to get the best performance and stability, while avoiding pitfalls like table corruption. In this white paper, he covers eGenerator's installation and configuration, as well as a discussion on how it works.

E1 Automation Scripts, by Bill Patow. Do you have some repetitive tasks you'd like to put on autopilot? Bill Patow has three CNC-related tasks for which he created tools to automate, thus freeing up his time to delve into other projects. If starting/stopping/restarting services, dealing with accidental service shut downs, or heapdumps play a big part of your daily routine, this article offers a discussion on some techniques and sample code you can use to reduce your time spent on these tedious tasks.

E1 Tools Release 8.98 and EnterpriseOne 9.0—The "Dot Zero Release That Wasn't", by Gregg Larkin. Just when you thought EnterpriseOne 8.12 and Tools Release 8.97 were it for a while, the newest E1 version, 9.0, and Tools Release 8.98 from JD Edwards® quietly snuck onto the horizon. Gregg Larkin has been enjoying his opportunity to compare and contrast the newest features available with this release, and has some feedback to share. If enhanced project management capabilities, increased administration information visibility, and improved end-user productivity appeal to you, then you'll want to read what Gregg has discovered with this dot-zero release that doesn't require the usual "let's wait until the bugs are fixed" approach.

E1 Oracle® Single Sign-On for JD Edwards EnterpriseOne – Part I: Oracle Internet Directory Integration with Microsoft active Directory, by Charles Anderson. If your company's IT security policy requires users to change passwords frequently, and each user averages five to ten passwords, one for each application, that can be a time consuming process for them. It's an even greater challenge for those who manage User IDs and passwords. This is where the beauty of Oracle Single Sign-On for JDE EnterpriseOne and other Oracle applications comes into play. Charles Anderson provides the steps to shorten the time for users and administrators by creating a single sign-on that requires one User ID and one password per user to access their JDE and Oracle applications. This is part one of a three-part series. This issue: the Oracle Internet Directory.

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E1 Installing the Server Manager Utility, by Bill Loban. One stop monitoring on EnterpriseOne®? You betcha! JD Edwards® 8.97 toolset's Server Manager functionality allows you to manage and administer all of your JDE® servers for 8.12. Bill Loban describes the steps necessary for downloading the 8.97 tool files for your deployment, enterprise, and Web servers. Then, he demonstrates how to install both the tools and Server Manager on the deployment server, along with the management agents on the servers you'll be monitoring.

E1 So You Want to Be a CNC? (Or Know What Yours Is Talking About?): Part III, by Gregg Larkin. It's among the features that make JD Edwards® unique in the ERP corner—Object Configuration Management, better known as OCM. To get a better feel for what this is, and how it impacts your system, Gregg Larkin returns to give us the pertinent details on OCM records, including what they are, what you need to know, and the role your CNC plays in this process. This wraps up Gregg's series on CNC fundamentals

E1 Securing SQL 2005 in EnterpriseOne®, by Carlos Sebaly. How locked down is your JD Edwards® EnterpriseOne system? If you haven't taken a good look since installation, you might be surprised to find how many possible security breaches and backdoors your system has, thus providing a golden opportunity for data tampering of both the inadvertent and purposeful kind. In this white paper, Carlos Sebaly addresses one potential area ripe for this type of intrusion: SQL 2005. Carlos demonstrates the steps you'll want to take to lock down this system, and to whom you should grant permissions, and how to do so, without opening the system to any unnecessary risks.

E1 Guide for Installing EnterpriseOne® 8.12 Standalone (Demo) Version, by Mark Williams. This JDEtipette was shared with us by Mark Williams, after he had gone through downloading and installing the E1 8.12 Standalone demo system. Much of what you'll see here is actually lifted from the JDE® Knowledge Garden and other guides, but he's added real-life notes to help ease the process for the next guy.

E1 EnterpriseOne Email Messages, by Mike Wright. First, Mike Wright demonstrated how to set up JD Edwards® EnterpriseOne to allow the system to send email messages. Now Mike kicks that knowledge up a notch; in this article, he takes us through the steps to send the same email message to multiple recipients—without putting email addresses in your event rules.

E1 So You Think You Wanna Be a CNC? (Or at Least Know What Yours Is Talking About?) Part II, by Gregg Larkin. We're back again in the merry ole land of CNC with Gregg Larkin, who continues his quest to help CNC newbies and others looking to better understand the key concepts that make the magic happen in EnterpriseOne®. Follow Gregg down the yellow brick Path codes, and see the truth behind Data Sources in Part II of this series. By next installment, you'll be humming, "We're out of the woods, we're out of the dark, we're out of the night…." when it comes to understanding CNC lingo.

E1 OCM Mapping – Creative Solutions to Everyday Problems, by Mike Wright, CNC Administrator, Werner Co. OCM Mapping, how much does Mike Wright love this functionality? Let us count the ways… In this article, Mike presents advanced tips on using OCM mappings to solve everyday problems. If you've been shying away from getting creative with OCM's flexible functionality, let Mike give you some prime examples of how he's taken advantage of this; then let your mind take you wherever "on the map" you want to go!

E1 Implementing SSL on the IBM Web Server, by Bill Loban. Now that JD Edwards® can be accessed via the Internet, to say that you need to secure your communications is an understatement. Sure, you're fine when it's just on your LAN. But HTTP isn't going to cut it when it comes to logging via the World Wide Web. You need something safe, something secure. You need Secure Sockets Layers (SSL) to secure your data transmission. Now you just need to implement SSL on your IBM Web Server. Bill Loban shows you how—step by step.

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E1 So You Want to be a CNC? (Or Know What Yours Is Talking About?) Part 1, by Gregg Larkin. So just what the heck does CNC mean? And what does that person who holds that title do all day? Better yet—what's he or she talking about? Gregg Larkin de-mystifies the role of a CNC in JDE® in this three-part series. In this issue, he defines Objects, Environments, and OCMs. So, whether you're considering this as a career path, or if you're a developer, business analyst, or IT manager just trying to get a better handle on some of the jargon tossed around in staff meetings by your CNC, this series will provide some insight into a job that has been best described by many as "the offensive lineman" role of JDE.

E1 EnterpriseOne Technical Myths: BUSTED!, by Mike Wright So, what's the latest rumor you've heard about EnterpriseOne? After a while, they become almost folkloric—like the email urban legends we mindlessly pass around, without actually checking to see what's fact and what's fable. In the email world, a simple surf over to "Snopes" will verify whether, indeed, not buying gas on a certain day will lower the price (FALSE). At JDEtips, we have Mike Wright, our own technical myth buster. Mike refutes some common misconceptions floating around about E1. See if you recognize a few of these.

E1 Creating a Separate PDF For Every Invoice, by Cezary Dadura. So, you've got a bunch of sales order that you need to invoice. You go ahead and run invoice print. But, what do you get? One big PDF file with all of the invoices. Not exactly practical since you'll probably need to send individual PDFs to various customers via email or fax. You really need a separate PDF for each invoice. Does this mean you'll have to run a separate report for each one? Not necessary, says JDEtips newcomer Cezary Dadura. Cezary shows us how to use Report Design Aid and a custom process to get the results we want from JD Edwards.

E1 Rules of the Road – OMW/Development, by Mike Wright. Our Rules of the Road series ventures back down the CNC path, this time with an article geared toward our developer friends. Object Management Workbench is a wonderful tool for project management and development in JD Edwards®. But, as Mike Wright points out, it's easy to run into some issues if you aren't careful with objects and documentation and so much more. Mike leverages his CNC expertise this issue to highlight his top 10 "rules" for OMW and development. Whether you're an experienced developer or CNC, or new to the game, check out these great tips to help you avoid the pitfalls while promoting your project smoothly from development to production.

E1 Building and Deploying Packages 101, by Gregg Larkin. Ever wonder how Mr. Solution Explorer Guy (aka Gregg Larkin), spends his Saturday mornings? Gregg returns to JDEtips Journal this issue to give us a step-by-step process to successfully building and deploying client code to fat clients and terminal server simultaneously, while minimizing the downtime for users. This combination of JD Edwards methodology with some best practices and un-documented tricks keeps things rolling at his company—go to our Code Vault to download the complete code.

E1 Deleting EnterpriseOne® User Profiles, by Mike Wright. What happens when you delete a User Profile from P0092? Do you know all that you've deleted? Do you know what you might be leaving behind? User profile deletions can leave orphaned records hanging in various tables, if you're not careful. And checking for all records in each table can be a tedious job, to say the least. Fortunately Mike Wright offers up a neat solution that can help you do a clean sweep the next time you delete a User Profile, without spending a lot of time and energy checking each and every table (unless of course, you really enjoy doing that sort of thing.)

E1 Exploring Package Builds – Definitions and Directories, by Bill Loban. So, you're building a package—what does that mean? Sure, you might know the steps to doing this task—the how and where, but do you know the "what and why" to what you're doing? Bill Loban takes us for a behind the scenes look at what goes into defining a package and what's created in those directories during the build.

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E1 **Rules of the Road – For Batch Jobs, by Mike Wright.** When it comes to Rules of the Road, CNCs certainly have more than their fair share to follow, particularly when it comes to batch jobs. Some changes are immediate, some need to be checked in and deployed, some need security, some need… well… it's a lot to remember. That's why we're so glad to have Mike Wright, a frequent JDEtips white paper contributor, to share his expertise. Mike has been down this road many times before, so he's very excited to present a few of the tips and tricks he's learned along the way that he believes will make your life easier when it comes to batch jobs for EnterpriseOne®.

E1 **Creating a Custom Database, Path Code and Environment, by Bill Loban.** A frequent contributor to JDEtips, Bill Loban has shown us in the past how to create custom databases, data sources, environments, and path codes through various White Papers that can be found in our Document Library. Now, Bill pulls it altogether in one very detailed paper that provides the 10 steps necessary to implementing a new environment that's capable of being upgraded.

E1 **Automatic Disabling of EnterpriseOne Profiles, by Mike Wright.** Automated housekeeping. Now there's a concept this editor can really get behind! And I'm sure all you Security Administrators out there will agree. Mike Wright shows us that we don't necessarily need to go in one by one and disable user profiles that are no longer needed. We can set up a batch job that will do it for us, based on our own criteria. Now, if he could just set me up a batch job to clear out all that obsolete stuff in my fridge…

E1 **Running iSeries Command Line from EnterpriseOne, by Mike Wright, Werner Co.** Finally—an "Easy" button for running iSeries commands from EnterpriseOne! Let Mike Wright take you through the steps including a batch job setup and what to look out for, particularly from a security point of view. It's all part of our mission to make you Think JDE for 2007!

E1 **EnterpriseOne Subsystem Jobs, By Mike Wright.** Here at JDEtips, we LOVE anything that can make JDE easier. Mike Wright offers up a great automation tip for using subsystem jobs to free your users from manually running repetitive batch processes. He provides you with the soup to nuts details on how this functionality works: the setup, record reviews, how to stop a subsystem job, and, if that's not enough, some fine examples of available subsystem processing. So, save the repetitive steps for the Stairmaster and go auto with subsystem jobs!

E1 **EnterpriseOne 8.11 Upgrade, by Mervin January.** Upgrades—sooner or later, you'll be faced with one. And, if you're tasked with orchestrating the implementation yourself---well, it can be a bumpy ride, to say the least. Mervin January knows. He's done several himself and feels your pain. And so, he shares his "tonic" for making upgrades less of a thorn in your side, and more, well, bearable. His ten steps to an easier upgrade come, of course, with some detailed documentation from one of his real-life experiences.

E1 **EnterpriseOne Maintenance, by Bill Loban.** There's really no such thing as maintenance-free: our cars, our houses and most definitely, our technology all require some time and investment on our part to keep things running smooth, at peak performance, and avoid breakdowns at all-too-critical moments (which you know is when they'll happen!) JD Edwards EnterpriseOne® is no different. Bill Loban has some tips for two areas that can get overly-cluttered and slow things down to a crawl if they're allowed to grow: Job Records and Associated PDFs, and Work Center messages. Ready for some Fall cleaning?

E1 **OCM Explained, Part 2 – Data Sources, by Bill Loban.** Bill Loban continues his series on OCM by walking us through the process of setting up data sources prior to adding their associated OCM mappings. Maybe a bit of cart before the horse, but we figured that you'd want to know all about OCM mappings in the first place before we tossed this subject out there. Since you can have varying types of data sources and different databases, it is pretty handy to have a way of keeping track of who's using which data where. This article will help you get all that sorted out.

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E1 **Visual ER Compare Tips, by Mike Wright**. So, you did an upgrade. Now, you need to go back and get the customized event rules back in. Fortunately, EnterpriseOne Xe has a tool—Visual ER Compare—that will help keep things straight. But, it has a few areas in which a bit more effort is required, as problems may occur. Mike Wright is back to take you through those areas with the tips on how to overcome the "gotchas" so that this tool can be powerful in any circumstances.

E1 **Keeping your i5/OS Users Out of Mischief, by Glenn Robinson.** You can't be too safe when it comes to operating system lock downs. Yet so few companies go beyond user roles and Object Authority to secure their systems. Glenn Robinson tackles this all-too-important topic with regard to i5/OS. So read on for how to protect your data from unauthorized access and save the office mischief for less dastardly deeds (like putting the office coffee pot back on the burner empty).

E1 **Mr. Websphere Guy Presents – Ooops, I've got a Flaming Hole in My Security!!!, by Gregg Larkin.** Well, the title certainly tells the tale of what's to come. Gregg Larkin, fka "Mr. Solution Explorer Guy" switches gears this issue to share a relatively unknown "gotcha" he recently encountered with Websphere's security and the tips he learned overcome it. If you're a CNC or tasked with any sort of JD Edwards® security and use Websphere 5 or 6, this is a MUST READ.

E1 **Object Configuration Manager (OCM) Explained, by Bill Loban.** There have been quite a few articles published in JDEtips that bring up the subject of OCMs. Some of our readers have queried, "That's nice – what the heck's an OCM, anyway?" So we asked Bill Loban to shed some light on the issue. Here are the basics of what the heck OCMs are, what they are used for, and how to get one of your own. Bill would like to write more on this subject later. We'll try to hold him to that promise!

E1 **Report Design – Sorting by a Calculated Field, by Mike Wright, Werner Co.** What happens when you've been calculating values and putting them into variables and now you need to do a data sequencing sort on one of those fields? Is it possible to do so? Conventional wisdom would say, "No, you can only sort on fields from the current business view." Then again, who ever said JDETips was about conventional wisdom? Welcome back Mike Wright, who's here to share a technique that bucks any thoughts of "can't do that." (would you expect anything less?)

E1 **OneWorld Uncaged – Virtual Applications, by Gregg Larkin.** So, how do you link two applications together, with two monitors (and full screens), when only one application wants to open and appear on both? Virtual applications are the answer. Gregg Larkin, aka Mr. Solution Explorer Guy, is back to share his latest tip based on his real-life experience with linking JD Edwards OneWorld® and a document imaging solution. His tip can apply to any IT application, though, and can result in a great deal of time saved by IT staffs "virtually" anywhere.

E1 **Changes in JD Edwards EnterpriseOne 8.12 – the CNC Perspective, by Bill Loban.** And the beat goes on! Oracle didn't kill EnterpriseOne® after all, but instead continues to crank out new versions. Bill Loban installed version 8.12 recently and is here to relate some of the "new stuff" from a CNC point of view. Read his heads-up regarding Rapid Install and file placement changes. They will make a difference in your installation plan.

E1 **Purging Media Objects, by Mike Wright.** If your system maintenance includes purging and archiving—are you remembering to purge or archive the media objects as well? If not, you're missing a sizeable table that can continue to grow over time, possibly hampering system performance. Fortunately, Mike Wright is back to walk you through the steps to purging and archiving this oft-overlooked (or mystifying) part of your system, thus allowing you more disk space, cleaner tables, and better-running system.

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E1 Citrix Administration Tips, by Mike Wright. Ah, the voice of experience. Mike Wright shares a couple of tips to help make your relationship with your Citrix environment a bit smoother. Read about automating EnterpriseOne updates and checking in a version when a user has forgotten to check it in.

E1 Ask Mister Solution Explorer Guy, by Gregg Larkin. The mailbag looks pretty full this issue. We've got questions on everything from scheduling to Citrix to third-party maintenance. So, how can Mr. Solution Explorer Guy help you today?

E1 UBE Performance Tips, Part II, by Mike Wright. Batch jobs are a very important part of the EnterpriseOne system. How they perform is critical to the smooth running of your system. Whether you are looking at a standard batch job or a custom job, this series of articles will help give you the knowledge to try to make your jobs run more efficiently. The first article addressed Data Selection – in this installation, we'll take a look at performance issues such as indexes, purges, and finance reports.

E1 Mr. Solution Explorer Guy - Remote Development Solutions, by Gregg Larkin. Do you rely on the expertise of remote developers to support your EnterpriseOne Applications? Is offering remote development something you have been tasked with? Our very own Mr. Solution Explorer Guy has done his homework when it comes to remote development. This article is sure to ease your remote development pains by comparing technologies that make stable remote development a reality.

E1 UBE Performance Tips Part 1 – Data Selection, by Mike Wright, Werner Co. Batch jobs are a very important part of the EnterpriseOne system. How they perform is even more important in some cases. Whether you are looking at a standard batch job or a custom job, this series of articles will help give you the knowledge to try to make your jobs run more efficiently. This article addresses Data Selection – in future installations, we'll take a look at performance issues such as indexes, purges, and finance reports.

E1 iSeriesTips for EnterpriseOne, by Mike Wright, Werner Co. It's not a big secret that those of us who run an iSeries absolutely love it. It does many things automatically that need constant attention on other platforms. However, using it as an enterprise server for EnterpriseOne poses some uniqueness that isn't typically found with other software applications. Mike Wright has shown us how to diagnose and treat some of the more common problems with EnterpriseOne on an iSeries server.

E1 SQL Server Maintenance, by Bill Loban. Whether you have been an EnterpriseOne customer for a long time or not, chances are that you have experienced some performance issues. More often than not, if you haven't experienced performance issues yet, you probably will. Bill has done a great job pointing out some tips on maintaining your SQL database to keep it running in tip-top shape.

E1 Mr. Solution Explorer Guy Presents: CNC Terms for Dummies, by Gregg Larkin. Okay, we know that none of our subscribers or readers are dummies. It was just a fun title. Okay? Gregg Larkin, AKA Mister Solution Explorer Guy, offers up here some down-to-earth, plain-talk explanations of some of the important terms that effect you whether you are on the technical side of the wall or not. This is a great opportunity for application-oriented folks to get the inside track on some of those esoteric technical terms you've heard bandied about.

E1 Database Tuning and Performance Recommendations for MSSQL Server and EnterpriseOne, by Dwight A. Paul, III. In the July/August 2005 issue of JDEtips, we gave you a white paper by Bill Loban on setting up your SQL server. In this issue, we not only present another white paper from Bill as a follow up, but we also bring you a fine article by Dwight Paul that expands on the subject. Yes, you guessed it – there is a theme going on here. Such an important topic as EnterpriseOne performance can't be overdone!

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E1 SQL Server Tuning, by Bill Loban. Bill Loban shows us how to optimize your SQL Server environment through carefully planning the placement of Data files, Log files, and Index files. You'll learn how to modify the EnterpriseOne® installation script and the SQL Enterprise Manager to control the file placement. This could be very important information – accepting the defaults could result in decreased performance on your applications.

E1 Generating Server Maps, by Mike Wright. The Object Configuration Manager (OCM) mappings are the lifeline of your EnterpriseOne system. The Object Configuration Master Table (F986101) contains all of the mappings that basically tell the system where to get the data and where to run processes such as business functions and batch jobs (UBE). It is very important that these mappings are accurate and maintained properly. Most people focus on the mappings that affect the client and then use SQL or manual methods to populate the server maps. This article will show how to make the process easier and tell you what to watch out for when doing it.

E1 Unicode, by Bill Loban. With EnterpriseOne® 8.10, came the introduction of Unicode. Unicode is a standard for representing characters as integers. Unlike ASCII, which uses 8 bits for each character, Unicode uses 16 bits, which means that it can represent 65,280 more unique characters. When upgrading to 8.10, clients have the option to convert business data and control tables to Unicode after the upgrade. Bill Loban's article will break this all down for you – what is Unicode, what are its benefits, and what to look out for if you choose to convert.

E1 Turning JDEDebug On and Off while Logged in to JDE, by Anuj Goyal. As a faithful reader of JDEtips, you have probably already read Mike Wright's article called "Generating Debug Logs" from November 2003. That article gave great instructions and tips for using the EnterpriseOne® debug log tool. This new article by Anuj Goyal shows us how he and his team developed a nifty tool to turn the debug log on and off "on the fly". Guess what they named this utility? We love to see creative minds at work out there making a good thing even better.

E1 EnterpriseOne Java Application Server (JAS) for WebSphere 5, by Bill Loban. This paper addresses the changes that have occurred since the writing of the JAS original Installation paper (EnterpriseOne Java Application Server (JAS) published as a white paper in January 2005. The original paper addressed the installation of version Xe of the EnterpriseOne product using WebSphere 4. This amendment will detail the installation of tools release 8.94 utilizing WebSphere 5.0.

E1 EnterpriseOne Java Application Server (JAS), by Bill Loban. As the day approaches where we'll all have to admit the reality of moving to an HTML front end, Bill Loban shares with us his experience in installing the Java Application Server for EnterpriseOne. From configuration through troubleshooting—and all the steps between—Bill walks us through the process and fills in the blanks. Save this one… you'll need it!

E1 Environment Copying Made Simple for EnterpriseOne, by Dwight A. Paul, III. From time to time, JDEtips has run articles about technical procedures that require or recommend copying an EnterpriseOne® environment as a step along the way. Well, don't you think it's about time we walked you through that process in detail? We thought so, too, and Dwight Paul has provided just the thing. This article will show and tell you just how to approach this, guide you around some holes, and let you know how to tell if it worked. It even gives some tips on how long you can expect some of the steps to take. Now that's just down-right friendly! Don't you wish all documentation did that?

E1 Using the Change Assistant (Formerly Known as the Deployment Assistant), by Mike Wright, Werner Co. Have you been guilty of resisting change? Suspicious of some of PeopleSoft's new ways of doing things? Mourning the loss of the Knowledge Garden? Fess up, now – We'll bet some of you have been. Read up here on the new Change Assistant – formerly known as Deployment Assistant, which is an advanced version of the Update Center. Mike Wright helps us see the advantages of using this new tool for searching application and tools updates.

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E1 Deploying and Accessing PeopleSoft EnterpriseOne 8.11 with Citrix, by Amanda Austin, Citrix Systems, Inc. JDELIST and our own email and telephones here at JDEtips have been abuzz with questions from the EnterpriseOne user community who are currently on a Citrix platform and are concerned about whether they can continue to operate in a Citrix environment when they make the switch to the EnterpriseOne HTML front end. So, we went direct to the source, and Amanda Austin, Citrix's Global Partner Manager, has provided us with the Citrix position on this issue.

E1 Upgrading OneWorld Xe to EnterpriseOne 8.10, By Bill Loban. With hundreds of clients busily upgrading to 8.10 before Oracle takes over (or the end of the World, whichever comes first), wouldn't it be great to have an article that summarizes the differences between the old upgrade process and the new. And maybe had a few of those field-tested (i.e., painfully learned) tips as well? We thought so, too. Here's Bill Loban's first contribution to JDEtips, and it's a timely one!

E1 Advanced Development: Using Table Handles, By Mike Wright, Werner Co. For those of you who want to: a) Get a handle on tables, or b) are walking around with handleless tables… Seriously, we love it when our authors of technical topics provide not only the technical steps, but also the practical business case for their tricks of the trade. In this article, Mike Wright takes the case of creating an exploded bill of materials list using table handles to simplify what could otherwise turn out to be some fairly complex coding.

E1 Maintaining and Operating your EnterpriseOne® Deployment Server: Procedures and FAQs, By Justin Miller. Deployment Servers—everyone's got one, and managing it is important to the health and welfare of your EnterpriseOne implementation. Justin Miller's wealth of CNC experience means that this is a useful article—and unlike Justin's own opinion, we feel that even experienced CNCs will get some useful nuggets here.

E1 Vertex: Installation and Configuration with PeopleSoft EnterpriseOne, by Dwight A. Paul, III. Here is an important heads-up for those of you who may be called upon to install Vertex into your EnterpriseOne® system. Dwight Paul fills in some omissions and corrects some misdirection in the standard instructions and takes us step-by-step through the process of successfully installing and integrating this valuable product. Upon successful installation, your user community will be able to access Vertex for calculation of payroll and sales taxes.

E1 Using the EnterpriseOne Job Scheduler Part II, by Mike Wright, Werner Co. In the July/August 2004 issue of JDEtips, Mike Wright offered the following challenge: "There are still a number of companies who under-utilize the EnterpriseOne job Scheduler or do not use it at all. That's a shame because this is a very powerful tool that is built into the software. With only a couple of exceptions, most of your scheduling needs can be met by this job Scheduler." In that White Paper, Mike covered the basics of setup, adding entries, and keeping the tables clean. In this second installation, he gives us some security considerations in addition to some valuable tips for making this powerful tool work better for you.

E1 Using the EnterpriseOne Job Scheduler Part I, by Mike Wright, Werner Co. In the interest of continuing to provide our readers with tips for optimizing their use of their enterprise systems, we are offering here an overview of how to set up and use the EnterpriseOne Job Scheduler. If you aren't using it because you weren't sure how to get started – well, that excuse just went right out the window, didn't it? Part II will be published in the September 2004 issue of JDEtips and will continue the scheduler topic with some more advanced concepts and ideas including setting up additional scheduler servers, handling of a default scheduler user ID, and some troubleshooting.

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E1 **JDE Date Converter, by Bret Morris.** This is not an article, but it is so darned cute, we just had to send it along. Bret Morris agreed to share this routine he wrote through our Document Library. JDE Date Converter pops up a window that lets you convert a JDE Julian Date to a Gregorian Date and vice-versa. You just gotta try it!

E1 **Copying a Path Code on an AS/400, by Mike Wright, Werner Co.** What? You mean I can't just select, copy, and paste? In this article, Mike Wright takes us through the steps to copy an AS/400 Path Code without shooting ourselves in the foot in the process. The key is to use caution and to plan, plan, plan.

E1 **Generating Debug Logs, Mike Wright, Werner Co.** In this article, Mike Wright shows us how to keep from digging ourselves into a deeper hole when attempting to resolve software issues. He gives us a nice reminder of the importance of debug logs for capturing recurring problems for resolution either in-house or for reporting to JDE. He helps us out with timing, how to get the logs set up, and how to get them out of the way for later use.

E1 **SQL Statements to Check on the Health of the Object Configuration Map, Phill Juffs, SMI.**
This article is a companion piece to Jean Driscoll's JDEtips article entitled Going to OneWorld Part IV--How OneWorld Knows Where Everything Is. In her article, Jean discusses how to set up the Object Configuration Map in the first place. Phill explains how to tell if you got it right and how to tell if your system has maintained its OCM integrity over time.

E1 **Automatic Package Deployment in OneWorld, David Schoenberger, Focus On The Family.** This white paper has proved to be the number one download at JDEtips. Everyone we've shown this white paper to says, "That is hot!!". They love the idea of automating the deployment of OneWorld packages to both Citrix Servers and Fat Clients. Learn how to write your own scripts with this very detailed guide.

E1 **Going to OneWorld - Part I, Jean Driscoll, Holiday Retirement Corporation.** This is the first in a series of articles that Jean is organizing around the subject of going to OneWorld. This is probably the biggest single decision that thousands of clients are facing. For those of you contemplating the move from WorldSoftware™ to OneWorld, the technology can be daunting. Reading this series of articles will give you an idea of what to expect from a technical standpoint.

E1 **Going to OneWorld - Part II. Pros and Cons of Fat, Thin, and Web Clients, Michael Kruc, Orange Glo International.** This article is the second in a series of articles designed to help non-OneWorld customers understand technical issues associated with migrating to OneWorld. You have the ability to use any or all of the clients, so knowing the pros and cons of each are quite important. This information will help you address the needs of both your IT staff and your end users.

E1 **Going to OneWorld - Part III. Upgrades, Upgrades and More Upgrades, Jean Driscoll, Holiday Retirement Corporation.** You have to admit, the one person with unlimited job security at a OneWorld site is the CNC administrator. And why is this? Upgrades! OneWorld software offers tremendous flexibility, allowing multiple systems to be used. This means there are constantly systems to update, including both hardware and software. What kinds of upgrades are we talking about? In addition to an overview of the Upgrade Process, Jean discusses the OneWorld-supplied upgrades—Electronic Updates (ESUs), Service Packs, Application Updates (ASUs) and Release Upgrades. This should be required reading for **all** implementation team members, not just technical staff. Everyone will gain insights on the planning, preparation, and pitfalls that you won't find in any official documentation.

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E1 Going to OneWorld Part IV – How OneWorld Knows Where Everything Is, Jean Driscoll, Holiday Retirement Corp. In the first article in this series, we discussed how flexible the JD Edwards® OneWorld® software is, allowing multiple hardware platforms and databases. The question becomes: How does OneWorld know where all of the program objects and databases reside? Because OneWorld runs on a variety of servers and can keep information in many different relational databases, OneWorld needs a mechanism for determining what servers are available for performing work and which databases hold which tables. OneWorld accomplishes this with two concepts: Data Sources and the Object Configuration Manager (OCM). A great primer for beginner and intermediate level staff!

E1 CNC Basics and Program Versions for Non Technical Folks, Tom Messer, Fleetwood. If you are new to OneWorld, and your role is managerial, technical, or functional--read this White Paper for an introduction to a brave new OneWorld!

E1 Object Management Workbench (OMW), Jean Driscoll, Holiday Retirement Corp. Jean is the OneWorld CNC Administrator for Holiday Retirement Corp., a JDE client. She has written an excellent 50 page guide that explains the change management process within Xe. A very useful White Paper!

E1 Details of Creating a New Environment in OneWorld, Jean Driscoll, Holiday Retirement Corp.
Here's the very detailed follow-up to Jean's overview article in the January, 2003 issue of JDEtips. If you need a "how to" on creating environments, this whitepaper tells you every single step and is illustrated with many screen shots.

E1 Users and the Object Management Workbench, Jean Driscoll, Holiday Retirement Corp.
Should you allow your power users access to the OMW in OneWorld? Do want to bother your technical people with promoting new Report Versions, and changes to Menus and User Defined Code tables? Read what a client (and the JDEtips Associate Editor for CNC) says. It just might open your eyes!

E1 CNC Package Tracking Spreadsheet Tool, Jean Driscoll, Holiday Retirement Corp. Need to keep track of all those packages you are deploying? Then you'll probably need this tracking tool. Why reinvent the wheel, when JDEtips already has what you need?

E1 Creating a New Environment in OneWorld, Jean Driscoll, Holiday Retirement Corp. After reading the introduction in the newsletter, be sure to read our more detailed white paper here: Details of Setting Up a New Environment in OneWorld. Both are by Jean Driscoll, an experienced CNC staffer at a JDE client.

E1 Restarting a Package Build, Dwight Paul, III, JD Edwards. Many clients are not aware that there is a tool within OneWorld that allows restarting a Package Build. Using this tip will save you many hours of CNC time.

E1 Setting Up Multiple UBE Queues, Dwight A. Paul, III, JD Edwards. Improve OneWorld's performance by setting up multiple UBE queues, both single and multi-threaded. Learn all the details from a JDE Master here.

E1 Running Two Instances of OneWorld on One Workstation, Tim Lyons, brij. There's a lot of interest in how to run both a Client version and the Stand Alone version of OneWorld from the same workstation. A good example of the need for this might be when training is being given, and you don't want to take the Client version off just to put on the Stand Alone version. Tim Lyons, a Senior Application Consultant from brij, explains all.

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E1 View Submitted Jobs in One Click in Enterprise One, by Scott Beebe, AMX International.
Scott Beebe has given us a useful tip that he claims can finally get the back-room team the recognition they so richly deserve. Wouldn't it be nice if users could just click once to view their submitted jobs? Something like this would be sweet, wouldn't it?

E1 Invoice Print – Improving Performance in EnterpriseOne, by Scott Beebe, AMX International.
In this mini-tip, Scott offers two different solutions for enhancing the efficiency of the invoice printing process. Even very experienced Sales Order Consultants and Clients will be surprised by what Scott reveals in the first few paragraphs of this tip. This article practically screams out "READ ME" to our staff.

E1 Using the AS/400 RUNUBE Command with EnterpriseOne, by Mike Wright, Werner Co. CNC specialist Mike Wright shows us how to get more flexibility in our scheduled batch jobs. Making use of the RUNUBE command, you can kick off one task after the first one has finished – tasks such as printing invoices at the end of the batch job that generates them. This command can help you increase the efficiency of your unattended processes.

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Technical –Customizing EnterpriseOne

Business Function Error Handling in UBEs, by Brian Oster. What happens when a Business Function (BSFN) throws an error in a UBE? It's like that proverbial fallen tree in the woods; even if your users don't see it, it's still there. Wouldn't it be nice, though, if you could get a warning on those BSFN errors in a UBE, just like you do in an APPL, before further processing occurs? Brian Oster has a way to make that happen. In this article, he outlines the steps to take and offers plenty of codes to help you get started.

Grid Icons: An Introduction, by Venkat Ramanan. Make your grid data more meaningful to users with Grid Icons. Venkat Ramanan takes us through the steps to build grid icons and their associated actions and tooltips. He'll discuss the components that make up grid icons and how to employ them.

Text Search Tips, by Venkat Ramanan. How can you make your EnterpriseOne text searches faster and easier? Read along as Venkat Ramanan discusses how you can use Text Search functionality, introduced with Tools Release 8.96, to improve your searches. Venkat demonstrates the functionality and how to incorporate it into applications.

EnterpriseOne Time is of the Essence, by Mike Wright. Time isn't always on your side when you're tasked with manipulating dates and times in JDE® EnterpriseOne®--especially if you're dealing with times that go into the next day. Mike Wright created a business function he'd like to share that will help you avoid the 24th hour dilemma and other time and date-related issues. Code included, naturally.

EnterpriseOne OMW Tips, by Mike Wright. Object Management Workbench is a powerful development management tool, one that can keep your development projects moving forward smoothly. To help you make full use of this tool, Mike Wright has assembled a number of basic and advanced tips for OMW that will help you with everything from constants setup and location saves to save/restore tricks and Advanced Get.

Creating Work Order History using Table Triggers, by Jeff Saenz. Wouldn't it be nice if there were such a thing as Work Order History, and you could see what changes have been made to your work orders, and solve mysteries, like who's been making these changes? While there might not be an exact equivalent to Sales Order History in JDE, Jeff Saenz has a nifty solution to help you see who has been in your work orders and what they're doing. He discusses the components you'll need to create this inquiry, and the minimal coding that will pull it all together.

Development Guidelines for E1 Pristine Object Modifications, by Brian Oster. You've heard the cardinal rule, never touch a pristine object. Sometimes though, even cardinal rules need to be broken. The trick, though, is how to do so safely, so that you don't have a mess on your hands. In this article, Brian Oster discusses how to modify pristine objects, including techniques to keep you modifications non-invasive as possible, how to manage and track these changes to avoid issues with ESU retrofits and upgrades, and more.

A Guide to Table Triggers and ER, by Ricky Cai. JDEtips Journal readers have been asking for a solid primer on Table Triggers and Event Rules and we're happy to say this article by Ricky Cai delivers. Ricky takes us through the steps to build a table trigger, sharing along the way the best practices and gotchas he's learned through his own trials and errors building triggers with the limited documentation available. Then, he shares more design and programming gotchas for Table Triggers in general.

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E1 W **Printer Control Language Escape Sequences in UBE Output, by Darryn Rose.** Your AP department sends out a lot of checks and expediting that process is critical. One of the biggest areas to slow down the process comes at check signing. This article by Darryn Rose demonstrates how you can achieve secure, electronic signatures by using PCL escape sequences to extract information from the printer's memory to overlay onto the A/P check. Darryn steps through the implementation steps for this solution, including the C BSFNs and processing options you'll use.

E1 **EnterpriseOne Item Branch Mass Maintenance, by Mike Wright.** It may seem like a simple request: make mass updates to values in the item branch records. However, what if there's hundreds—even thousands—of these records and you could only change them manually? That simple request now seems like a nightmare waiting to happen. Mike Wright knows a thing or two about averting IT nightmares with creative batch jobs and easy to create custom applications, and this request is another he and his team have tackled. This article provides the steps you can take create a batch job and application to make mass updates to item branch records, code included.

E1 **Complex Data Selection Using C BSFN, by Rick Cai.** If you have a process that requires a complex analysis of select data and you're finding that your performance is slowed using UBE versions or NER coding, this tip is for you. Rick Cai demonstrates how you can employ a C Business Function to speed up this analysis so that your front-end processes are crisp and prompt. Included in this article are the steps you'll want to take, along with code and SQL statements you can modify to meet your business inquiry needs. Please note: While there may be other ways to accomplish the functionality used as the example in this article, the technical steps and considerations remain valuable in any number of situations.

E1 **EnterpriseOne Schedule by Fiscal Date Pattern, by Mike Wright, CNC Administrator, Werner Co.** Do you have a "different" Fiscal Date Pattern than most companies? If you are on 4-4-5 accounting, you'll want to read this to take advantage of the code Mike provides to get the E1 Job Scheduler to run correctly in your environment. Mike created a business function that will generate scheduler records based on the Fiscal Date Pattern Table (F008).This article details the how-to. While this solution was written to resolve finicky fiscal pattern issues, Mike notes it can be easily tweaked to use a different, even a custom, table.

E1 **General Cache Processor, by Jeremy Ruth.** Developers: Tired of the duplication of effort when it comes to creating JDE® Cache business functions? If your answer is yes, we've got some great news for you. Jeremy Ruth has detailed the step-by-step instructions for creating a generic cache processor that re-uses C coding, so that the time you once spent creating a new Cache BSFN is reduced. Included in this article are details on New Data Items, the objects that make up the reusable cache processor, and the objects that enable the dynamic setup of cache indices. Plus, Jeremy has included the code you'll need in a zip file**.**

E1 **In What Task View Does That Program Exist?, by Jeff Saenz.** You know it's in there, somewhere. Maybe it's a report, or a program, but you've forgotten where it appears in the task view. Or maybe you have tasks that you no longer use and are just clogging your system—can you identify which ones they are? Wouldn't it be nice to find those tasks quickly, without spending a lot of time drilling down through layers or clicking on every task, hoping to eventually find the right ones? In this article, Jeff Saenz presents an application for EnterpriseOne® that can help you find those elusive or unused tasks more easily—code included.

E1 **EnterpriseOne® Auto Job Submitter, by Mike Wright, CNC Administrator, Werner Co.** If there's a way to make the EnterpriseOne Job Scheduler easier to use, you can count on Mike Wright to find it. This time, Mike shows us what to do when you have a job that needs to run multiple times a day: you can submit the job once, but teach it to submit its own next scheduled runs at the appropriate times; you can even make it smart enough to wait for the first one to finish before it submits the next one. The article steps us through both the business function and code needed for auto submission.

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E1 Custom QBE in EnterpriseOne® Applications, by Mike Wright, CNC Administrator, Werner Co. You've created some great inquiry applications for your users in EnterpriseOne. Only problem—you've added some data or columns that aren't part of the business view, which prohibits users from being able to QBE in those particular fields. Does this mean your users are out of luck? Not if you check out the solutions Mike Wright presents in this article. Mike looks at this situation from both a single column and multi-column perspective, and presents the workaround – including code – that he's put in place to help his users QBE—without requiring IT to produce special queries or reports.

E1 JDE® Cache Design Patterns, by Brian Oster. How much do you know about JDE Cache implementation? If your answer is "not as much as I think," then get ready for a crash course courtesy of Brian Oster. Brian demonstrates how various API calls fit together and when you would want to apply them, with emphasis on the two main design patterns used for Cache implementations: Shared Cache and Multiple Instances, along with lots of code you can use. He's even put together a code zip file that you can apply to your 9.0 environment. So get ready to "cache" in on this great article.

E1 An Easy View of Table Columns and Indices, by Jeff Saenz. Traditional methods for viewing the columns and indices of a table aren't exactly user friendly; you either need to be a developer or have specific technical skills in order to see what's there. And, if you're a business analyst, often by the time you've received this assistance, the view could be out of date. Jeff Saenz recognized a need for a time saving application that allows business analysts to view tables and their properties with greater ease. In this article, he details the setup of his tool, P57TABLE – Columns in a Table, including how you can apply it to your own business situations.

E1 EnterpriseOne® MRP Net Change, by Mike Wright. What do you do when you have a duplicate demand problem, but running MRP to correct each problem is not an option, and MRP's standard net change approach won't fit the bill either? That was the problem Mike Wright and his team were challenged with—coming up with an MRP net change approach that was customized to meet their company's needs, but one that wasn't so loaded with custom code that it created a host of other problems. In this article, Mike documents the final solution, including code that you can adapt to meet your company's specific net change needs.

E1 An Introduction to Power Forms Development, by Scott Beebe. With EnterpriseOne 8.12 comes a tool that lets you more easily streamline your application forms. But before you launch into designing your first power form, you'll want to take note of what Scott Beebe learned the hard way. Scott provides a step-by-step tutorial with tips and techniques not documented elsewhere.

E1 EnterpriseOne Standard Deviation, by Mike Wright. Obscure requests can throw any developer into a bit of a panic—especially if the documentation on how to accomplish such a task is as obscure as the request itself. Such was the case for Mike Wright recently when he was asked to calculate Standard Deviation for a report in JD Edwards®. The information on how to do so was limited, if available at all, thus leaving Mike to his own devices. But conquer he did—and his solution to calculating a Standard Deviation within EnterpriseOne is presented in this article, including both a refresher on the calculation itself and the code to add this to your system, should the need arise.

E1 EnterpriseOne® Work with Submitted Jobs Shortcut, by Mike Wright. It's time to cut out the middleman and get down to business faster in P986116—also know as Work with Submitted Jobs. In this article, Mike shares how to create an application that bypasses the "pick server" prompt screen that appears each time you run Work with Submitted Jobs. Put this custom application on your menus, and your users will be automatically directed to the correct server for their job.

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E1 EnterpriseOne® Business Object Reservation, by Mike Wright. Put a "Do Not Enter" sign on your custom tables and applications next time you're in them. Mike Wright demonstrates how to apply Business Object Reservations, a functionality commonly used in Sales Order and Procurement, to lock down your tables and applications so that only one user can update them at a time. Mike describes the steps needed to lock records when they're in use, and unlock them when the update is completed.

E1 Using a Variable Flat File Name in a Table Conversion, by Paul Hanson. Paul Hanson is back! This time, he's got an easy solution to a tricky problem: changing the flat file name during post-development table conversions in EnterpriseOne®. Paul takes us through the steps of this solution—using a variable flat file name—providing (of course) the necessary code.

E1 Automated Distribution UBE, by Mary Woltman. So, you've got lots of reports to run, and everyone only wants to see what they need to see – not a bit more. Does this mean you have to spend the entire day recreating the report for each individual, then embark on the tedious task of emailing each one individually? Mary Woltman feels your pain – she dealt with a similar situation and found a UBE solution that addresses this need, to create specific reports for specific individuals automatically, without having someone stand guard. We're sure you'll appreciate the flexibility of this solution, too

E1 Rules of the Road – OMW/Development, by Mike Wright. Our Rules of the Road series ventures back down the CNC path, this time with an article geared toward our developer friends. Object Management Workbench is a wonderful tool for project management and development in JD Edwards®. But, as Mike Wright points out, it's easy to run into some issues if you aren't careful with objects and documentation and so much more. Mike leverages his CNC expertise this issue to highlight his top 10 "rules" for OMW and development. Whether you're an experienced developer or CNC, or new to the game, check out these great tips to help you avoid the pitfalls while promoting your project smoothly from development to production.

E1 Invoking a UBE in Silent Mode, by Venkat Ramanan. PDF pop-up files: just a nuisance or a major time waster? Either way, you can help your end users spend less time closing down files they don't need to see when they launch a UBE. How? By invoking the UBE in "silent mode". Venkat Ramanan demonstrates two different techniques for doing this: One for UBEs that take in parameters via the RI DS, and one for UBEs that don't.

E1 Creating Inbound Data Interfaces, by Scott Beebe. Are you looking for a better way to build 3rd party interfaces? Creating inbound data interfaces to work with 3rd party systems can present a number of challenges—especially when you're looking to make them user-friendly. What's more, many of these interfaces still rely on text files for security concerns and other system limitations. So how can we import data more efficiently? Scott Beebe has a methodology that he has tried, used, and refined many times. He returns to JDEtips to provide you with his processes, and even shares a sample code you can use as a template to start creating your own interfaces!

E1 Customizing the EnterpriseOne® Web Portal, by Chris Carter. Is your EnterpriseOne Web Portal looking too much like Oracle, and not enough like your company? Are your users getting confused by similar looking environments? JDEtips Journal newcomer Chris Carter shows us a very simple solution for customizing your Web portal and EnterpriseOne menu so that your users (and bosses) will be duly impressed! And we all know how often THAT happens without a lot of effort—it's time to take this simple tip and go!

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E1 Easy Bar Code Printing, by Paul Hanson. You've heard rumors that your company is going to invest in a Bar Coding solution—after all everyone knows that to stay competitive, you've got to increase speed and accuracy inside the 4 walls of your warehouse. You are an E1 programmer, so you figure the other IT guys and gals will buy an off-the-shelf solution with pre-built integration to JD Edwards. You're sitting pretty. Then management calls, and you are told: "Bob, we need you to investigate Bar Coding solutions, and figure out what we can do quickly and inexpensively. What will you do? Freak out? Not! You're a JDEtips subscriber and you remembered that this article was chock-full of real world advice. Another day saved!

E1 Easy CSV Output for EnterpriseOne Reports, by Paul Hanson. No ERP system, including our dearly beloved JDE, has all the reports in exactly the format we like. That's why so many of us turn to spreadsheet programs such as Microsoft Excel to take standard report data and further slice it and dice it to our liking. No, this article isn't about creating Excel Pivot Tables! It's about how you can get cleaner Comma Separated Variable data out of your JDE reports. Seems there is a bit of a problem with report headers being treated like data, and this tip shows you how to clean that up automatically, before you import into the spreadsheet.

E1 Object Management Workbench Overview, by Tom Spond. While in the process of developing his new JDEtips Mastery Level Accelerated Developer Workshop, Tom Spond found he had some good information suitable for a JDEtips white paper. This article gives you a great overview of the Object Management Workbench. Tom presents both concepts and details, stepping you through practical exercises so you can see for yourself how OMW can be used most effectively. If this simply whets your appetite for more development information, check out our Summer of 2005 Public Workshop Schedule and sign up for Accelerated Developer, Beginner - July 12-15, 2005 and Accelerated Developer, Advanced - July 19-22, 2005 in El Segundo, California.

E1 A Technical Approach to Implementing A/P Wire Transfers, by Paul Hanson. Save money by changing the way you spend it. This article describes the process for working with your bank to complete automated payments so you don't have to spend your time (and money) printing paper checks and mailing them. The features described here are built in to your EnterpriseOne® software, but there are still some chores you have to do to make it work for you.

E1 Setting up Multiple F0010 Tables for UBE Report Headers, by Dwight A. Paul, III. You probably already know where the Company Name on PDF report headers comes from, right? Hint: It's the F0010 Table! Well, what if your environment is set up for multiple companies? How can you get the right Company Name to show up on the right report? In this article, Dwight Paul shows us how to set up multiple F0010 Tables for multiple companies, then takes it a step farther and shows us how to assign different company names to different users or groups of users. What a great way to add that extra bit of clarity and professionalism to your reporting environment!

E1 Developing a Positive Pay Interface, by Paul Hanson. In today's unfortunate atmosphere of concerns about fraud – both internal and external – and the ever-growing accountability requirements, it pays to cover yourself coming and going. Positive Pay is just one of the methods now being employed by corporations to serve both to protect themselves and to provide that accountability. This article shows you how to implement a simple method for accommodating Positive Pay. Once again, Paul Hanson comes up with a solution that costs little and saves big.

E1 Creating Custom Overtime Rules, by Scott Beebe, AMX International. We should call this one, "Scott Beebe's Excellent Adventure". As usual, Scott's article, though classified as "technical", sets up a strong business case and follows it through. He shows us how to use our coding and thinking skills to solve a complex business problem – this time in the payroll module. He's given us the steps to build a custom overtime rule, then also shared with us the code he used to accomplish it. We've included that code in a separate document within the JDEtips Document Library.

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E1 Custom UBE to Reset Commitments, by Scott Beebe, AMX International. Sometimes the application people can't do anything until the technical people do their thing. We left you hanging in the March 2004 issue, when David Johnson said that Scott would come up with a technical solution for a major gotcha in the Repost Commitments program – R42995. Scott rose to the challenge, and we're pleased to present his solution.

E1 Troubleshooting Commit Failures, by Mike Wright. There's nothing clients love more than those cryptic error messages that say, "something's wrong but I'm not going to tell you what". Mike Wright helps us get on the track of hunting down the root cause of those occasionally mystifying commit failure errors.

E1 Using ODA Link for Data Integrity Validation, by Brian Freund. Brian shows us a spectacular method of saving time for your IT group, while placing power in the hands of those in your user community who have the desire and skills to use tools such as Microsoft Query or Microsoft Access to develop their own queries against the JD Edwards® database. Brian gives us some excellent examples of how to use these tools to develop data integrity queries in the manufacturing arena.

E1 Creating Error Messages with Parameters, by Scott Beebe. Here is another tip that can help make your JD Edwards® users love their IT team. Not many things make our eyeballs bulge more than getting a "useful" error message that doesn't tell us what's wrong. Scott Beebe shows us two easy ways to lower the average blood pressure in your offices by customizing these error messages to give more information. Go ahead. Be a hero.

E1 Using SQL Views in OneWorld, Scott Beebe, AMX International. Scott Beebe gives us a succinct, to-the-point tip that might be worth its weight in gold. He shows you how to combine the strengths of OneWorld® Business Views with those of SQL Views for apparently seamless access to multiple databases. If you want to read another perspective on this same concept, please read David Johnson's Joining On a Union – A Development Tool for Sales Reporting, also published in the November/December 2003 issue of JDEtips.

E1 How to Debug Business Functions Using Visual C++, Scott Beebe, AMX, Inc. Scott's articles on OneWorld programming have consistently added tremendous value to the JDEtips newsletter. Here's Scott's take on a very important topic—how to debug custom code.

E1 Tips on Using Form Design Aid in OneWorld, Scott Beebe, AMX, Inc. Pay attention and you'll probably benefit from Scott's experience with designing custom forms. You'll learn plenty as Scott takes you through check boxes, radio buttons, and how to activate ER to run over all selected grid lines in a Multi-Select Grid.

E1 Guidelines For OneWorld Customizations, Scott Beebe, AMX International. Scott continues his series of tips on OneWorld programming, with a thought provoking article on when to modify JDE directly, and when to do a bolt-on. You may be surprised by his take on this important topic, and you may re-evaluate your own policy after reading this article.

E1 Extending OneWorld Functionality Using Business Functions, Scott Beebe, AMX International. This is for you C++ programmers! Scott explores two recommended ways to extend OneWorld's capabilities. One uses a C business function to access a 3rd party DLL. The other uses standard C code and the Windows API. Whew! I don't understand this stuff, but Scott sure does!

E1 Expand Your Automated Emailing Capability, Scott Beebe, AMX, Inc. This is already one of our favorite JDEtips of all time. Who wants to know how to expand the size of a OneWorld generated email beyond the current limited size of 256 characters? Who wants to know how to pass variable data from JDE directly into the email? OK, everyone put your hands down, and start reading. This is the kind of stuff we love, because it is going to result in quick results for your company and, of course, it will make you look great to the powers that be!

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E1 Adding Media Object Support to OneWorld Applications, Scott Beebe, AMX, Inc. You know that paperclip thing on the left side of the grid in OneWorld? It indicates that there is a media object attached to the record. Scott continues his excellent series of technical tips with this article on how to add media object support to OneWorld or custom programs that do not have this capability. Step-by-step, Scott gives you a complete explanation of how this is done.

E1 Retrofitting Custom Objects Using Visual ER Compare, Madhav Ketkar, DTI. Here's a creative solution to get around a common problem: comparing your custom object to a standard object when a new version of the standard is available. Get around that pesky requirement that only objects with the same name can be compared!

E1 Understanding Data Selection Processing in OneWorld, Scott Beebe, AMX International. Data Selection? No problem, right? Fine, but if you aren't getting the results you expect, read this tip from Scott Beebe. You'll be surprised at how these subtle tips will help increase your efficiency in using designing reports. This white paper has proved very popular with Scott's clients and JDEtips readers.

E1 *TODAY Data Selection in OneWorld, by Boris Goldenberg. We want our *TODAY! For those of you on OneWorld who used to be on WorldSoftware™, you probably have noticed that *TODAY disappeared in OneWorld®. Gosh, that was an incredibly useful function and we want it back! Never fear, Boris Goldenberg has the answer. For those of you who are wondering what all the fuss is about, *TODAY allows WorldSoftware clients to tell the system to use today's date for data selection, or today's date minus a fixed number of days. This is incredibly useful when you need a date or date range sensitive report but don't want users having to go in and change data selection criteria every day.

E1 Auditing Changes to Critical Files in OneWorld, Marty Resnick, Norman's Nursery. This is a very practical tip designed to give you step-by-step instructions on how to audit critical OneWorld files with both a report on file changes and an automatic email to a systems administrator when the file is changed. Marty Resnick, the IT Manager at a JDE client, makes his writing debut with this white paper.

E1 OneWorld Technical - Calling 3rd Party DLLs from JDE Applications – Part I, Sai Sharma, Systems Management and Venkat Gangavarapu, Candle Corporation. Third Party DLLs are very useful in writing programs for customization, integration and implementation of JDE applications. JDE customers as well as Independent Software Vendors can develop various utilities to be used with JDE's programs. These 3rd Party DLLs can play a major role in integrating the applications in a heterogeneous application environment.

E1 OneWorld Technical - Calling 3rd Party DLLs from JDE Applications – Part II, Sai Sharma, Systems Management and Venkat Gangavarapu, Candle Corporation. In Part I of this series (July/August, 2003) the authors defined DLLs, or Dynamic Link Libraries, and showed you how to create them and the best way to use them. In Part II, the authors round out the subject by giving a working example.

E1 Writing Platform Independent Business Functions For OneWorld, John Oliver, Unity Enterprise Solutions. One of the great advantages of the C language is its inherent Platform Independence. C compilers are available for almost every hardware and operating system imaginable. Why this article then? The reason is that while the C language is largely platform independent, the Operating System (OS) that hosts the software is not. It follows then, that the areas of interoperability and integration with remote systems present platform independence issues most often. This article explores some issues that arise from this platform dependence, and presents some approaches to overcoming them. A case study is presented for a Find Files function.

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How to Automatically Email PDF Files, by Michael Walsh and Christine Cangialosi. This article shows us how to remove the extra steps of distributing reports that your EnterpriseOne applications produce in PDF format. Whether the report is generated from the client side or the server side, the technique demonstrated here will automatically email the PDF files to the appropriate email address. This article is available both stand-along and with custom code attached.

EnterpriseOne Master Job Submitter, by Mike Wright. Can you create one batch job to submit several other batch jobs? Yes you can! Mike Wright shows you a streamlined process that allows you to add batch jobs to one master batch job. He'll step you through the process, including the tables, processing option templates, business views, and the master batch job you'll need to create, then he'll show you how you can use your new master job submitter to improve your productivity and efficiency.

Text Search Tips Part II: Customized Control, by Venkat Ramanan. Venkat Ramanan continues his discussion on how you can use Text Search functionality, introduced with Tools Release 8.96, to improve your searches. Venkat demonstrates how to build a custom text search from scratch using standard form controls in FDA.

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Technical – Data Display Decimals

E1 **Changing Data Display Decimals After Going Live,** **Arash Danaie, Enthusium Inc.** If you've ever tried to change quantity decimals in OneWorld, you'll know the big gotcha—if you are already live, JDE has no canned way to convert your existing master and transaction data. That means you pretty well have to do it before you go live. Want to do it later? Well, that's what JDEtips is here for—we have the answers no one else has. This guide is a valuable supplement to previous guides published by JD Edwards and JDEtips on how to change the quantity decimal places.

E1 W **Changing Quantity Display Decimals,** **Jean Driscoll, Holiday Retirement Corp.** Changing quantity decimals is not for the faint of heart. You will find that hundreds of screens in Inventory, Distribution, and Manufacturing are affected. The good news? It does work! And this article is full of tips from someone who's been there and done that – several times.

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Technical – Performance

E1 W **IBM Levels the Playing Field for System i Customers, by Glenn Robinson.** What's new in System i? Glenn Robinson gives us a glimpse at some changes such as new user-based licensing for i5/OS with the introduction of models i515 and i525, making this option more affordable than ever. He also highlights other enhancements recently introduced, and gives us a sneak peak at i5/OS V6R1, poised for release in 2008. Plus, Glenn shares how IBM heads toward a "greener" future— and we're not talking about the $$$$. This is a very informative article for anyone currently using, or soon considering, System i

E1 W **Integrating Windows Servers With i5/OS, by Glenn Robinson.** What are the benefits of integrating your Windows Servers with i5/OS? We'll let Glenn Robinson walk you through the many reasons to consider going the System i route. If you're looking to improve availability and utilization, while reducing costs and simplifying your IT infrastructure, then Glenn makes a compelling case for why this may be the solution for your Windows servers!

E1 W **Database Tuning - Using The AS400 SQL Database Monitor, by Jean Driscoll, Holiday Retirement Corp**. In the endless quest for performance tuning, there are many twists and turns along the way. Jean Driscoll takes this opportunity to straighten the road a bit by teaching us how to use IBM's DB Monitor to find out where we should build indexes to speed up our data access.

E1 **Improving UBE Performance - JDE.INI Setting - InstallERSpecs, by Mike Wright, Werner Co.** JD Edwards is constantly adding new functions to help with system performance. But somehow the news of the changes and how they are implemented rarely gets to the customer. Here's a tip on how to benefit from one of JD Edward's lost treasures—a relatively new jde.ini setting that can improve performance of batch jobs on the enterprise server.

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Technical – Security

E1 W **JDE Security, by Brian Conner (Webucation Recorded Session)** What are the main functional JD Edwards security types? Would you like to understand them better and learn how they work? Join us, and JDE Security expert Brian Connor from ALLOut, as we define data security and explain the roles that go along with each type. We'll show you role sequencing and how to address the deficiencies many customers live with. You'll come away with an understanding of the "6 layer hierarchy" and learn how to manage conflicts. This security overview is suitable for all versions of JDE. Once we complete the overview we'll take a brief moment to share a toolset that easily fills the security holes in vanilla JDE.

E1 **EnterpriseOne® Security Best Practices, Part 2: Looking In *and* Outside the Box, by Gregg Larkin.** Tasked with security for JDE? It's a never ending challenge for most administrators, with so many aspects of the system to consider and so many opportunities to miss something crucial. In part two of his series on EnterpriseOne security best practices, Gregg Larkin delves deeper into the system itself and presents some best practices with regard to web servers, integration servers, local browsers, and more.

E1 **Data Stored in Third Party Software – Can EnterpriseOne Use It Directly?, by Mary Woltman.** Here's the challenge: The data you, or your users, need to see in EnterpriseOne® is in another database, on a non-JDE® server. Can you access it? Mary Woltman has been down this road before and has a custom solution for EnterpriseOne that she details in this article. Next time you need to see data in a server on EnterpriseOne, this database connection could be just the magic you need to make that happen.

E1 **EnterpriseOne® Security Best Practices: Looking Outside the Box, by Gregg Larkin.** Think EnterpriseOne security and you're probably thinking about application security. But there's a much bigger picture that needs to be considered when reviewing your security practices with respect to your EnterpriseOne system. In this article, Gregg Larkin takes you on a tour of all of the servers and areas external to the applications that could bring unwanted exposure if they're not locked down.

E1 **Row Security Overview, by Andy Vanspranghe.** Row security might not be your first choice for data restriction, but there may be times when it is the best option—such as when proprietary or confidential information is involved and locking out an entire application is not a practical solution. In this white paper, Andy Vanspranghe discusses the security benefits vs. the system performance gotchas associated with row security in EnterpriseOne®.

E1 **Menu Filtering by User ID, by Carlos Sebaaly.** So, you have users with similar roles—but maybe not all the same the permissions. While Fine Cut and Menu Filtering are great for assigning roles, what about individual users who may need minor changes? Carlos Sebaaly demonstrates an alternative menu filtering method using the Security Workbench that provides flexibility to assign tasks to both roles and users.

E1 **Changes in the JDE Security Model to Support Sarbanes Oxley, by Bill Loban.** Who's been making changes to your database? If your company uses a proxy user; i.e., "sign-on security", your audit trail will show one user only for all changes made. That's not exactly what the auditors are looking for when they ask to see which individual users made which changes. So how do you get around this issue? Bill Loban provides the steps you'll need to make to the JD Edwards security model in order to reflect individual users (and keep those auditors happy!)

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E1 **Passing a Sarbanes Oxley Security Audit, by Michael Moorman.** We all know that when our software offers us flexibility, it also forces us to make many decisions. Some must be based on practicality, some are cost-based, and some are purely technical. Now we are faced with an entire new level of decision-making based on regulatory requirements; most specifically in this case, the Sarbanes-Oxley requirements. Michael Moorman demonstrates the primary differences between Menu Security and Deny *All Security, and shows us how and why the latter is going to get you a lot farther with your SOX audit.

E1 **EnterpriseOne Security Comparison UBE, by Mike Wright.** Mike Wright offers a custom solution for comparing user or group security profiles. This can help you when you need to change security for an individual or if you want to ensure that groups are set up correctly. It is also a handy tool for simply "cleaning house", where you might want to eliminate duplications among security groups or remove profiles that are no longer needed. We think you'll find this tip very helpful in streamlining and auditing your security environment.

E1 **Security: Securing PDF Files From Un-Authorized Viewing, by Dwight A. Paul, III.** We must admit to some trepidation when faced with an article that points out exactly how to get around EnterpriseOne® security to view reports that we oughtn't. But somehow, presenting the solution without a full description of the problem just didn't work for us either, so here's your opportunity to learn how to be naughty. Just please do read the rest of the article! If you are not a CNC, be sure your CNC knows about this article. The job you save could be your own!

E1 **Security History for EnterpriseOne, by Mike Wright, Werner Co.** Okay, who's been messing around with my User ID? How come my Role seems to be different? Or: My Password doesn't work; should I be cleaning out my desk? No? Boss say's you're okay? Then you'd better find out who changed your security settings. But how? Mike Wright shows us the way by giving us a tour of the Security History functionality – how to set it up and get it started, how to use it, and how to manage and purge the data.

E1 **Security Reporting Tips, by Ellen Deak.** There's nothing like the voice of experience! Ellen Deak set off to create some reports for her security system, and found many landmines along the way. This article draws a map around the craters and shows us how to delve into the nether regions of the security structure to get just the data we are looking for.

E1 **OneWorld Security - An Overall Strategy, Alex Rippingale, QS Software International.** Alex is a World and OneWorld security expert, having been intimately involved in the development and support of QS Software's ACQUILA and Qbuild products for the JDE market. Who better to give us his thoughts on how to setup OneWorld security, than someone who does it fulltime? For the novice and expert alike, this is an excellent white paper on overall security strategy.

W **WorldSoftware Technical - World Security Strategy: How to do a Detailed Review, Alex Rippingale, Q Software Global Limited.** Alex defines an approach for systematically reviewing your JDE security implementation to see how effectively it has been applied. Alex includes strengths and weaknesses of JDE security as well as recommendations for how best to utilize each security feature. Learn how to lock down your implementation tight, before giving access.

E1 **Version Security in OneWorld, Alex Rippingale, QS Software International.** Alex is a World and OneWorld security expert, having been intimately involved in the development and support of QS Software's ACQUILA and Qbuild products for the JDE market. Alex does a great job explaining all the ins and outs of OneWorld Version Security.

W **Securing World Software, Jean Driscoll, Holiday Retirement Corp.** Benefit from Jean's many years of experience with WorldSoftware Security. This 16 page document is filled with helpful tips on implementing security.

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E1 W **Creating A Security Plan, Jean Driscoll, Holiday Retirement Corp.** Jean has worked with JDE's World and OneWorld software for 15 years, and has "been there and done that" when it comes to setting up security. The first step is always the same, designing a good security plan. Get a head start on designing your security plan with Jean's help.

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Technical – Solution Explorer

E1 **Ask Mister Solution Explorer Guy, by Gregg Larkin.** In the May/June issue of JDEtips, we introduced you to Gregg Larkin, who gave us an excellent article, "Converting OW Explorer Menus to Solution Explorer: Tips and Techniques". As a followup to that article, Gregg shares with us his real-life stories and tips and tricks based on questions he has fielded. We are pretty sure we'll be seeing more of the Ask Mister Solution Explorer Guy tips in the future! Feel free to email Gregg if you have additional questions about Solution Explorer.

E1 **Converting OW Explorer Menus to Solution Explorer, Tips and Techniques, by Gregg Larkin.** JDEtips is pleased to introduce Gregg Larkin, who has agreed to write a series of articles for us. We think you'll agree that Gregg's articles are a fine read. Gregg clearly had his users in mind when he designed the Solution Explorer menus for his ERP installation. In this article, you'll see demonstrations of how to achieve "just what the user wants" instead of just what the system wants to give you. In the July/August issue of JDEtips, Gregg plans to discuss the care and feeding of your Solution Explorer menus post-implementation. You may also want to take the opportunity to see Gregg's presentation on Solution Explorer at the June 2005 Quest Conference & Expo.

E1 **Migration from EnterpriseOne Explorer to Solution Explorer, by Gary Arbeider, District of North Vancouver (DNV).** Have you heard the news? No more menus in EnterpriseOne, starting with release 8.9. We are on top of this major change to the user interface, with a great article from Gary Arbeider. This is a great read and something you will want to hang onto when it is your turn to make the switch to Solution Explorer.

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Technical – Work Flow

E1 **Emailing Workflow Messages, by David Bissonnette.** OK, so you've set up EnterpriseOne® to send workflow messages through the Employee Work Center®. But there's a slight problem: Nearly everyone, particularly casual users of JD Edwards, forgets to check their Work Center regularly. They are too busy handling all the email they get in Outlook, right? Who wants to check another "email" system? Remember PPAT? (That's for you oldtime World clients.) A real-life experience with such a situation resulted in this tip from David Bissonnette on how to cover two bases at once by directing Workflow messages to external email. Now you can be more assured that the messages you send are being received!

E1 **Using Workflow Management to Automate Business Processes, by David Bissonnette.** We've been looking for a good article on Workflow for a looong time. At last! David Bissonnette had been holding out on us all along (but we're sure he didn't mean to). This article gives a great overview of what Workflow is all about, and walks us through the setup and execution using a good practical example. If you aren't using Workflow because you don't quite get it, this article should nicely remove that particular stumbling block. Thank you, David, for sharing your expertise with us.

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Technical – World Software

WorldWriter Report Searches with SQL, by Rick Snell. Somewhere, in your vast archives of WorldWriter reports, is the report for which you've been searching. Maybe it's something you created a long time ago and want to resurrect for a current project. Or maybe it's a calculation that needs to be fixed on multiple reports. Or perhaps you just want to see which reports look at what files. In this article, Rick demonstrates how to quickly pull up reports for which you might otherwise spend hours digging around.

World Writer Sets and Eliminating the Redundant, by Rick Snell. It's always a shame to see robust functionality left ignored because people find it intimidating. That's often the case with World Writer, according to Rick Snell. It's big and it's not well understood. Rick hopes to help diminish some of that trepidation by explaining how World Writer looks at data by using the mathematical concept of sets and subsets – including an in depth look at Summary Functions. Then he'll demonstrate how you can create a cleaner report by using headers and footers to remove "clutter" so that you can add more vital information onto one report.

World Menu System Tips, by Rick Snell. There's gold hidden within your JD Edwards® World menu system. OK—maybe not the $800 per ounce variety. But there is a wealth of information in there, just waiting for you to tap in and discover. Rick Snell demonstrates how to use three key files—F0082 (Menu Master), F00821 (Menu Selections), and F0082H (Menu Selection History)—to do such tasks as determine sources of Address Book revisions, find security holes in menu masks, set security criteria for DreamWriter users, develop test scripts, and much more.

Ad Hoc Open Order Searching for World®, by Rick Snell. Searching for open purchase order information in JD Edwards® World can be a tedious task, particularly when the search information is vague, or multiple details are needed. There are lots and lots of screens through which to wade. But, as Rick Snell demonstrates, there is an easier way to accomplish this by utilizing an interactive SQL statement to customize your inquiries, and cut your screen searches down significantly. Rick steps us through both before/after examples to show how much simpler your searches can be—even if your search criteria are limited to start.

Interactive and Batch Data Import and Export in World A9.1, by Kathy Adams. If transferring data from JD Edwards to spreadsheets has been a drag (and not as in drag and drop), there's a new feature in World's latest release, A9.1, that's bound to make you smile. Kathy Adams demonstrates the new JD Edwards World PC Import/Export functionality that enables interactive and batch import/export of data, even with custom screens. This article is based on Kathy's presentation at Collaborate 08. A full PowerPoint of this presentation is available for download in the JDEtips Document Library, under the Collaborate 08 category.

Search Type Security in World—The Search is ON, by Rick Snell. You do a search in the Address Book, and before your eyes—a wealth of information appears. Addresses, names, account numbers—maybe even some of the most sensitive information of all: Social Security Numbers. All of it readily available, in just a few keystrokes. Think you need to lock it down? You betcha! But can you do this in such a way that you're allowing access where needed, without opening up your critical information to everyone? You might be thinking—"okay, but Search Type Security is simple and I know what it does." Prepare to be impressed as Rick Snell discusses the basics and some advanced tips that will help you automate your Search Type Security setup.

Combining IBM and JDE® Data for an Audit Reporting Strategy, by Rick Snell. Ah, audits. Like death and taxes, you can't avoid them. But you CAN take some steps to make life easier for both you and the auditor by combining some key security information found in both IBM iSeries and JDE World® into one report. Rick Snell provides some tips that will help you pull this data together pre-audit, so that you and your auditors will be faced with a lot less paper come audit day.

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World Writer Tips, by Jeff Babcock. Looking for some tricks that are really treats this Halloween? JDEtips newcomer Jeff Babcock has reached into his World Writer goody-bag and scared up some great tips to make your reporting experiences less spooky. Whether you're afraid of the dreaded “divide by zero”, always jump when you have to calculate days between dates, or totally frightened by using non-JDE reports in World Writer—Jeff takes the fear and frustration out of these and other common reporting problems (so you’ll be less likely to want to TP someone’s house the next time you get handed a last minute report request!)

Setting Up and Reporting On World Action Code Security, by Rick Snell. It’s a hot topic these days—security reporting. The problem is, some approaches to setting up security just don’t seem to be user-friendly—especially for those tasked with monitoring the situation. Fortunately, Rick Snell has a great tip to help you cut through the clutter and get the information you need to see from the system, efficiently. His method uses a join between F0003 and F0092. He’ll walk you through the setup steps, along with tips he’s learned along the way to making this method smooth.

Setting up and Using JDE World's Data Base Audit Manager, by Jim Rubino. Tracking what changes are being made and who’s making those changes in your company’s World® file records is a lot easier, thanks to Data Base Audit Manager. Jim Rubino joins us to give you some tips for setting up this vital tool, which will allow you to continuously record the who, what, where, and when of data base changes. The Audit Manager records the before and after images for each change, along with user IDs and date/time stamps. We’re sure the time you spend getting this process in gear now will save you a lot of time down the line when the auditors are next in town!

"Google" Search your JDE A7.3 Address Book, by Eric Lehti. If you enjoy the simplicity of Internet search engines such as Google™ and you wish you could have something similar for JD Edwards World® Address searches—we’ve got some great news! There is functionality already available in your system, using Program P01200 and the F16 key,that will allow you to “google” your JDE Address book searches, thus getting you the names you want quickly. Eric Lehti takes us through the steps and menus you’ll need to increase your search capabilities. Even more, he provides some pointers for how to avoid a lengthy result listing, and how to “spider” your Address book.

Supplemental Data Rules of the Road, by Cordell Kirk. In the January 2007 issue of JDEtips, Andy Klee gave us an article called "Advanced Pricing Rules of the Road". This article turned out to be so popular that we have invited some of our top writers to continue the theme. Cordell Kirk starts us off with his "RotR" for Supplemental Data. Supplemental data can be a valuable method for managing data that isn't accommodated in your standard JD Edwards World® database tables. This article guides you through their care and feeding.

Payroll Timecard Integration Simplified, by Paul Hanson. The methods may be hi-tech, but the need is the same: making sure you track employee time accurately. Integrating a third-party time tracking system (such as Kronos™) with JD Edwards can be a tricky situation. In the “time”-honored JDEtips tradition, Paul Hanson offers his interface design and code — saving you time and expense. Punch in here to learn more!

How to Obsolete a Customer Address Record, by Jim Rubino. So, you and a customer are parting ways. . how do you deal—at least from an accounting perspective? You need to block the ability to enter Sales Orders for this customer, but at the same time, you need to keep the sales history available for future reference. There are a number of ways to do this, but Jim Rubino has a truly win-win answer for making a customer’s Address Number obsolete, without sending the prior information into cyber-space. Read on as he takes you step-by-step with his solution to this dilemma.

DreamWriter Open Query File, by Marsh Narawek. Not everyone has the luxury of owning the JD Edwards World CASE Tool. Those of us who don’t normally just copy another program’s source code, strip it (leaving only the important stuff), and then move on to applying our custom code. There are, however, occasions that we miss something and it causes the program to fail. This articles gives us some tips for analyzing and correcting these failures.

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W **Displaying UDC Tables that have a Value in one of the two Description Fields, by Jim Rubino.** Have you ever needed to find where a description from a UDC is coming from? Or have you needed to find out where the same description is used in multiple UDC tables? Or have you wanted to check consistency in wording for descriptions? Or maybe you have just thought how nice it would be to see all of the UDC tables that have a value in one of the UDC description fields? Jim Rubino gives us another great tip for making life easier. Read on! This Journal article shows you the end result – the "long" version in our Document Library includes all the code.

E1 W **Converting JDE Julian Date in Microsoft Excel – a JDEtips "Tip-ette", by Lixin Yang.** Here at JDEtips, we occasionally like to publish small, easily-digestable "tip-ettes". When this one came across our desk, we felt that with so many people exporting data from their JDE database into Microsoft Excel, and given the ongoing trials of dealing with the JDE date format, we thought this one would be an excellent one to share. Lixin Yang gives us the code to create your own Excel date conversion function. While this article is written for World, the Excel function would still work in EnterpriseOne; the difference is in how you get the data to Excel.

E1 W **Interfacing With Non-JD Edwards Timecards, by Paul Hanson.** Life would be so simple if we could accomplish everything without worrying about interfaces from/to JD Edwards. But that turns out to be the rare exception. Paul Hanson shows us how to bring payroll timecard data from "somebody else's" timecard application into your JDE Payroll system. In this article, you'll see both the business process and some of the technical specs. We also have a "long" version in the Document Library that includes the entire RPG program to finish up the process.

W **Displaying WorldWriter Versions that Created a File, by Jim Rubino.** Jim Rubino is at it again – yep, you guessed it – making life easier for his World user community. This time, Jim describes a utility that will give you a list of all files that were created by World Writer versions, or conversely, which World Writer created a specific file. Pretty slick, huh? Keeps people from overwriting each others files, and sure helps with housekeeping, as well. As usual, we are posting this article both with and without the code and file specs that go with it.

W **Automating iSeries FTP For World, by Paul Hanson.** JDEtips Senior Technical Editor, Paul Hanson, was chosen for that role for a reason. His tips and his style for presenting them are so practical, concise, and so well-written that we hardly need to edit them first. This article shows us once again how to save lots of time and money without spending lots of time and money in the process. This relatively simple bit of customization will allow you to automate the FTP communications between your iSeries World environment and remote FTP servers. From screens to script, this article gives you everything you need to implement this time-saving device.

W **Displaying Menus Using a Dream Writer or World Writer Version, by Jim Rubino.** Sometimes people just plain don't like it when you change their "stuff". Especially if they didn't know it was going to happen. Well, generally the person doing the changing doesn't like surprises, either, so Jim Rubino went into proactive mode and created a method to make it easier to find out who's using what **before** it gets changed instead of just making the change and sitting back waiting for the phone to ring. This technique can certainly also have value in monitoring your user access for audit purposes, so read on! (Our JDEtips Document Library will also have this article available as a "long version", complete with all the code.)

W **Copy Spooled Files to Output Queues, By Marsh Narewek.** Our favorite thing about our JDEtips contributors is that their primary goal seems to be to make life easier for their customers – This article describes a scenario where users were clearly not having any fun, so Marsh Narewek teamed up with his co-system-supporters to develop a utility to solve the problem. Take a look at how they were able to send the same report to multiple printers at the same time – saving time from the night run and simplifying the process for the users at the same time.

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Emailing Reports and Forms from World, by Jim Rubino, Fike Corporation. Just when we think we've found the perfect third-party product to solve our particular problem, we find that we need Jim Rubino to help us make it actually work for us. Jim shares with us here the behind-the-scenes tricks needed to email reports and documents from World® using third-party emailing tools. The way he explains it, it looks pretty easy – once you know how!

Recursive Version – How it Works Plus a Unique Trouble-Shooting Tip, by Marsh Narawec. If you find yourself "cursing" Recursive Versions, you really need to read this article. Marsh Narawec gives us not only a succinct explanation of how Recursive Versions work, but also of how they might NOT work. Read and learn from one who has been there and done that – another example of why JDEtips presents articles written from the trenches.

Unlocking a DreamWriter or WorldWriter Version for Security, by Jim Rubino, Fike, Corporation. Science Fiction writer, Robert Heinlein, once wrote a story about a man who was "too lazy to fail". While we are certainly NOT suggesting that Jim Rubino is lazy – hardly that! -- he tends to employ the same techniques suggested by Mr. Heinlein for inventing fairly painless methods that save tons of work! In this article, Jim shows us another of his enhancements that lets you get in, get out, and get on with whatever you were doing!

Sleeper Enhancements, by Jim Rubino, Fike, Corporation. In the January/February 2004 issue of JDEtips, Jim Rubino gave us an unbiased (well, almost) assessment of the relative merits of the AS/400 Job Scheduler and the World Sleeper. If he appeared to favor the Sleeper in any way, perhaps the enhancements he created had some influence. You think? Read on for details of getting more bang for the buck on this valuable unattended job scheduling tool.

World Version A7.3 cum 15 – A Review, by Jean Driscoll, Holiday Retirement Corp. and Jim Rubino, Fike, Corporation. On March 18ty, 2004, PeopleSoft announced a March 31st release of World A7.3 Cumulative Update 15. PeopleSoft graciously granted JDEtips the opportunity to share the announcement details with you, our faithful readers. We invited World experts and regular JDEtips contributors, Jean Driscoll and Jim Rubino, to give us the highlights and their assessment of this exciting and long-awaited update. For all the good news, and how to download the full writeups from PeopleSoft, read this article!

Changing World Writer Data Selection Values: Printing a State's Vertex Tax Codes, by Jim Rubino, Fike, Corporation. Here is another installment in Jim Rubino's series of tips on how to make WorldSoftware™ sing and dance. In his last installment, he showed us a technique for creating a lookup window to find specific information, using the example of Vertex Tax Codes. (Please see "Finding a Vertex Tax Code", JDEtips September/October, 2003). This article takes us to the next step, which is to set up a World Writer program to accept user input for data selection values. This has broad applicability – well beyond this Vertex example. Source code is included!

Comparison of JDE's Sleeper and AS/400 Job Scheduler, by Jim Rubino. Decisions, decisions, decisions! If you've wondered which of the available job scheduling tools to use but haven't had time to go through step-by-step to figure out which one does what, Jim Rubino's article sums it up for you. He doesn't make the decision for you, but gives enough information to make the decision easier for you to make.

Creating a Custom Lookup Window in WorldSoftware: A Vertex GeoCode Example, by Jim Rubino, Fike Corporation. Even if you don't use Vertex, check out this article. You'll learn how to code helpful lookup windows that can be called with a Hidden Selection. Look up employee birthdays, user IDs, security information, etc. We hereby give everyone permission to be creative with this tip!

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Stopping Single Character Fields From Auto Advancing in World Software, by Jim Rubino, Fike Corporation. This is one of those simple programming changes that really seems to be worth the maintenance effort. Within WorldSoftware there are several programs that use single character fields on the video screen. When a value is entered in a single character field, standard JDE functionality advances the cursor to the next field. Frequently the user has to execute multiple keystrokes to advance to the next desired input field. This simple one line modification makes the screen much more usable by preventing the auto advance. An example where this could be very useful is the screen used to setup WorldWriters.

Stop Losing Messages on the AS/400: Enhancements to Hidden Selection 60, by Jim Rubino, Fike Corporation. Jim repeatedly comes up with great technical tips for our WorldSoftware audience. This one continues that record with a series of helpful enhancements to the Send Message function on the AS/400. You know what we're talking about. It's the command that everyone uses to remind the Instructor that it's time for a class break!

Sending WorldSoftware Approval Messages to External Email, by Vasu Venkateswaran, Datamatics. JDE introduced Approval Processing for purchasing in WorldSoftware A7.3 in 1993. Ever since, clients have wanted to know how to get the system to send email notifications to external email addresses (outside of JDE's rudimentary PPAT module). Your wait is over! An excellent explanation that has been field-proven at several clients.

Adding New Hidden Selections in WorldSoftware, by Jim Rubino, Fike Corporation. Just about everyone on WorldSoftware uses the HS command to get to Hidden Selections. Jim Rubino, master of JDE® and AS/400 programming, shows how to add more commands to the HS window. Specifically, Jim shows you how to add the WRKSPLF (Work Spool File) command to the Hidden Selection Window.

AS/400 SQL Tutorial, by Kevin Montgomery, Schwarz Company. Need a crash course in SQL? Careful use of SQL will pay off in quick queries and reports that even good old RPG can't match for speed or ease of creation. A great introduction and some advanced tips from a seasoned pro.

A Better Way to Display and Print AS/400 File Information, by Jean Driscoll, Holiday Retirement Corp. Wouldn't it be nice if there were an AS/400 command that would print important file information like field definitions, keys, and dependent logical files? Users often come to technical folks with questions about file layouts. Here are two useful commands and the code needed to get them working. Be sure to download a separate PRTF file from the Document Library to be uploaded to the AS/400.

Segregating DREAMWriters, by Bob Bloomquist, Kokosing Construction. Have you ever looked at a list of DREAMWriter Versions and wondered, "How do they keep all these versions straight? How do they know which ones to run, and when?" Bob Bloomquist, a WorldSoftware client, has an excellent technique that cuts down on the confusion. This technique also resolves issues about who is allowed to change and execute which versions of a DREAMWriter.

Debugging a World Software Program, by by Jim Rubino, Fike Corporation. For World program specialists, the major challenge is not figuring out how to write the world's greatest program… it is figuring out why that perfect program is not giving the expected results. In this article, Jim Rubino guides us through a true time-saver: the art of choosing which debugging tool to use to chase down a problem. He then walks us through the steps for three different debuggers.

Generic UDC Code, by Mike Savino. The ability to create a new “custom” UDC Table in JD Edwards is cause for celebration! If you’re creating custom programs, the custom UDC helps you avoid the necessity for hard-coded values in your programs, while increasing flexibility and giving the custom work a JD Edwards look and feel that your end-users have become accustomed to. This white paper includes a nice example of how this technique works, and includes all the code you need at the end!

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Webucation

***Webucation**: Webster's (of course) defines Webucation as a mix of webcast and education, delivered as only JDEtips can. For the real deal (information, please), with a dash of humor, join your host, Andy Klee, as we travel down the path of enlightenment.*

Note: Webucation event recordings are available for download only by JDEtips Journal subscribers. You may download the PowerPoint presentation and/or the Webex recording. Please keep in mind when downloading that the Webex recordings are large zipped files and in MP4 format. Recorded sessions may be downloaded from: http://www.JDEtips.com/JD-Edwards-Library/Multimedia-Presentations/Schedule.asp

E1 **What's Hot with JDE EnterpriseOne 9.1, by Greg Davis.** The JDE world is all abuzz about E1 9.1. From the new features, to best practices, to planning your upgrade and more, this webucation session offers an outstanding primer to what this new release has to offer.

E1 W **JDE Security, by Brian Conner.** What are the main functional JD Edwards security types? Would you like to understand them better and learn how they work? Join us, and JDE Security expert Brian Connor from ALLOut, as we define data security and explain the roles that go along with each type. We'll show you role sequencing and how to address the deficiencies many customers live with. You'll come away with an understanding of the "6 layer hierarchy" and learn how to manage conflicts. This security overview is suitable for all versions of JDE. Once we complete the overview we'll take a brief moment to share a toolset that easily fills the security holes in vanilla JDE.

E1 W **The ABCs of Enterprise Hosting, by Mark Goedde.** We've all heard about "the cloud" but what the heck is it? Learn how a cloud-based infrastructure, along with Enterprise hosting, managed services, and SaaS, can save your team time and money when it comes to running JD Edwards.

E1 W **Automated Data Collection, by Paul Hanson.** Add efficiency and transaction accuracy to manufacturing, warehousing, and distribution operations with Automated Data Collection--this Webucation session highlights the concepts and best practices.

E1 W **Does your Inventory Reconciliation have Integrity?, by Greg Caudell and Jeanene Jensen.** Sanity saving tips on JDE Inventory Reconciliation, including a detailed overview of the process, best practices, strategies, and more.

E1 W **JDE Upgrades, by Greg Davis.** Expert advice on what it takes to ensure a successful JDE upgrade, including discussions on common mistakes, best practices and MarketSphere's proven upgrade methodology.

E1 W **Training and Retention Beats Knowledge Leakage, by Cushing Anderson.** One of the foremost experts on ERP training shares his insights on the role training plays in enhancing the likelihood of JDE project success.

E1 W **Hidden Gems and Low-Hanging Fruit within JD Edwards Manufacturing, by Pat Martino.** There's so much untapped value in your Manufacturing module that you may not even know about--until now. Join JDEtips' Manufacturing expert Pat Martino and get caught up on what you might be missing in several areas, including Product Definition,' Shop Floor Management, Product Costing/Manufacturing Accounting, and Manufacturing Planning.

E1 W **Business Intelligence, by Dr. CJ Rhoads and Mike Lutito.** So many metrics, so little time. How do you know which KPIs are the ones to use when designing your BI solution? Dr. Rhoads combines her academic and entrepreneurial experience to deliver solid, research-backed, business advice to guide your BI implementation.

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Mike Lutito follows with highlights of Microstrategy's BI solution for JD Edwards World and EnterpriseOne. MicroStrategy, a global leader in (BI) technology, provides integrated reporting, analysis, and monitoring software that helps organizations make better business decisions.

E1 W **Advanced Pricing, by Tim Scott and Andy Klee**. Advanced Pricing can be a bear. Even if you know what you are doing. When you get the wrong price on an order, it isn't always easy to figure out why. Join Tim Scott and Andy Klee as they explain how to troubleshoot your Advanced Pricing setup. Then we'll cover some of our favorite Advanced Pricing tips, including our favorite Rules of the Road—designed to keep you out of trouble. Tim and Andy have over 25 years of Advanced Pricing experience between them—so take advantage of their expertise.

Bonus Document: Attendees will get a copy of our new "Step by Step: What the Pricing Server Actually Does"—this should be a big help in troubleshooting your setup.

E1 W **Multi-Country Implementation Strategies, by Jan Jaap Weerstand**. Doing a multi-country rollout of JD Edwards can be a massive undertaking. Will you use a centralized or decentralized approach? How will you get a grip on the legal/tax requirements, localizations, and cultural differences in each country? All while trying to meet your implementation schedule and project budget.

Learn from Steltix, a European-based Oracle Platinum Partner, with over 15 years experience running multi-country rollouts of JDE. We'll cover best practices, a proven methodology, and hard won tips--specially designed for JDE clients involved with multi-country implementations.

E1 W **EDI, by Brian Gilbert**. Brian is Mr. EDI around JDEtips. He's consulted on JDE EDI implementations for over 10 years, and has authored numerous JDEtips articles on EDI. Brian will share his expertise on one of the most popular transactions, the Inbound 850, aka Inbound Customer Sales Order.

E1 **Can the JD Edwards Reporting Tool Do it All?, by Penny Allen and Dave Hansel**. Join Penny and Dave as they dispel the myths surrounding ERW, the EnterpriseOne report writing tool. Hear "the Facts not the Fiction" as you learn how ERW really works.

E1 W **Hidden Gems in JDE Financials and Distribution, by Cheryl Pierce and Andy Klee**. An in-depth review of JDE's financial integrity jobs, advanced tips in Procurement, Sales Order and Pricing, including "Hierarchical Category Codes".

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UPK

E1 W **UPK: Beyond the Basics, by Sue Maiwald.** User Productivity Kit (UPK) is an innovative and effective way to build end user training materials. Those tasked with creating JD Edwards® training programs using UPK might find there are a few areas in which this software is not intuitive to work with from a design and development aspect. Sue Maiwald shares some of the advanced tips she's picked up regarding adding sound, changing banners, adding Visual Assists, and much more.

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World Release Notes

PeopleSoft World A8.1 Service Pack 6 Announcement, by Klee Associates. JDEtips is pleased to share with you a PowerPoint presentation that PeopleSoft's Product Manager, Tom Carrell, sent to us for publication. This presentation outlines the new direction PeopleSoft is taking with the World product – they are pumping new life into it with A8.1 Service Pack 6! Possibly the most important piece of information in this accouncement is that there is now a direct path from A8.1 to EnterpriseOne—that's big; it used to be a dead end, and you couldn't get from World A8.1 to EnterpriseOne. Some clients may want to upgrade from A7.3 to A8.1 to get the improved functionality, particularly in Lean Manufacturing, but also across the board in Financials, Payroll, Distribution, and others – plus improvements in the Technical Foundation.

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World Upgrades

World in Oracle's Kingdom: To Believe or Not to Believe, by Cordell Kirk. With his ears to the ground at Collaborate 08, Cordell Kirk kept notes on what other JD Edwards® World customers were saying about the future of World software in Oracle's ever-growing dynasty. Was the future bright? Or was World doomed? Cordell took the questions and concerns that arose out of the sessions he attended, plus the word on the showcase floor, and brought them to 15 World customers for their "take" on Oracle's commitment to their beloved software. In this article, he presents his findings.

Planning Your A9.1 Upgrade – *Project Management Tips and Lessons Learned from an Early Adopter*, by Cordell M. Kirk. If you're planning to upgrade to JD Edwards® World® A9.1—this article provides some insight as to how one company, Fike Corporation, managed its recent project successfully. Cordell Kirk reports from the trenches as his company becomes one of the first to "go-live" with this latest release. Cordell's lessons learned offer a glimpse at the non-technical side of an upgrade, the process planning—which he found to be the foundation for a smooth transition.

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Reviews From JDEtips Subscribers

"JDEtips was able to provide me with a solution that I could not find on the Knowledge Garden. Even JDE's Help Desk in Denver could not help me. A solution was provided by JDEtips in a couple of days for a problem that I had spent weeks trying to solve." ***Vincent Chai, Database Administrator, Art in Motion***

"Andy, the JDEtips article on rounding (unit prices) was INCREDIBLE! After reading it I was able to fix something that had plagued the company for years in a matter of minutes. THANKS!!!!!" **Larry Spurlock, Walco International.**

"Thank you very much for sharing the May 2003 JDEtips article on Delinquency Fees with me!! I greatly appreciate you bringing this article to my attention! Your product has been a very helpful tool for us! I was pleasantly surprised to have received a personal email from you containing the article that directly relates to the topic I am working on. Your personable customer service is GREATLY appreciated!" ***Kristina Ehnert, Staff Accountant, Arvig Communication Systems.***

"Too bad I had to figure all this out the hard way about 2 years ago. None of our consultants even hinted at a way to do this (customize DBAs) without code changes. Articles like this unleash what seem to be secrets that are closely guarded by other consulting firms." **IT Staff, IMP Group**

"Wow! Thanks so much for sending this information to us/me! (Manufacturing Accounting Issue) This is the first time that I actually had time to surf around the tips area and it is awesome." **Cheryl Cooper, Deloitte & Touche**

"I sure wish we had read your tip on Vendor Consigned Inventory before we implemented it a different way. Your way would have saved us much time and effort, and given us better control over the process." **Theresa Haskovec, Applications Manager, Ennis Business Forms**

"I would like to start by saying the Item Restrictions Tip you have on the website is OUTSTANDING!!!! I have a client that really could have used this tip. Luckily, they didn't spend thousands trying to reprogram the system, as they had other priorities. I forwarded the tip to them, and it should alleviate some of their pains when they send a proprietary item to a competitor (which does happen, despite all of their efforts)." **Wendy Byrd, Senior JD Edwards Consultant**

"Your newsletter is a tremendous idea. The concept has been brought up for years, to have a repository of solutions for the difficult requirements. Thanks for putting it together." **Jim Haugen, Engagement Manager, JD Edwards, Minneapolis**

"This is awesome. It looks like you've come a long way in a short period of time." **Neal Alsup, Manager of Global Support, JD Edwards.**

"Your company's knowledge base has been leveraged by myself and others here at Simplot. I am highly recommending that we as a company subscribe to your newsletter as the information it contains is very beneficial." **Lanny Nelson, Business Analyst, JR Simplot**

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