



March/April 2011

On Cross Functional

Enforcing Hierarchical Category Codes

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E1 Editor's Note: 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.

Recently, JDEtips shared an interesting concept with JD Edwards clients concerning the idea of setting up hierarchical category codes to ensure that the data in their master files actually make sense.

Figure 1 shows a hierarchy for two category codes as an example.

Codes	Description 01	Description 02
001	Vitamins	
002	Dietary Supplements	
003	Sports Nutrition	

Codes	Description 01	Description 02
200	B1	001
210	B12	001
220	B2	001
230	B6	001
240	C	001
250	D	001
280	Acidophilus	002
290	Antioxidants	002
300	Muscle Enhancers	002
310	Omega 3	002
320	Probiotics	002
330	Body Building	003
340	Fitness & Energy	003

Figure 1: Hierarchy for Two Categories

The Description 02 field in the UDC table is used to link the second category code back to the first category code. For example, B1 has 001 in Description 02, which links back to Vitamins in



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the S1 Category Code. This is a great way to do reporting, but the big problem with this reporting process is that there is no inherent way in E1 to enforce this hierarchical structure. We will take a look at how to enforce this structure; and fortunately, it's not as hard to do as you might think.

Turn on Description 02

First, you need to make sure your UDC values have Description 02 useable. You can do this by going to the UDC application and selecting the Form Exit for Code Types. Figure 2 shows this Form Exit.

Codes	Description 01	Description 02	Special Handling	Hard Coded
200	B1	001		N
210	B12	001		N
220	B2	001		N
230	B6	001		N
240	C	001		N
250	D	001		N
280	Acidophilus	002		N
290	Antioxidants	002		N
300	Muscle Enhancers	002		N
310	Omega 3	002		N
320	Probiotics	002		N
330	Body Building	003		N
340	Fitness & Energy	003		N

Figure 2: Code Types Form Exit

After selecting Form Exit for Codes, the screen shown in Figure 3 appears.

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