



EMDA Integration into Enterprise Management

A step by step guide to integrating EMDA into (X3)
Enterprise Management.

CONTEXTUAL LINKS



To integrate contextual links within standard EM screens we must first add screen components, screen(s), and update the windows the links will reside in.

- Create screen components
- Create screens
- Update container windows

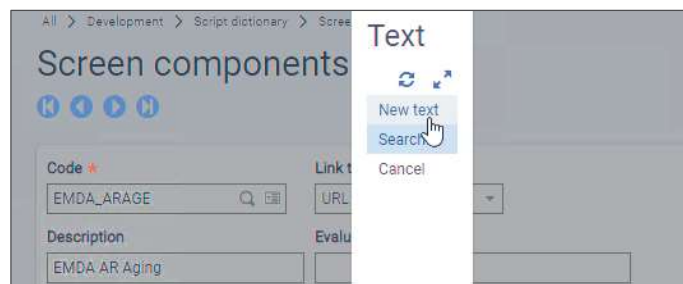
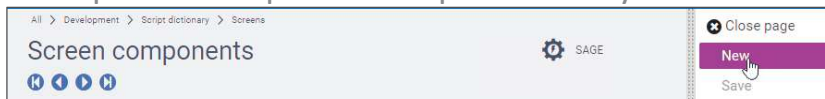
Throughout the creation of these resources we will utilize the EMDA activity code. This will make it easy to search and edit in the future as well as export for patch importation for migrations.

SCREEN COMPONENTS



Navigate the site map to Development>Script Dictionary and select screen components

- Select New
- Name code and description
- Select 'New Text' in selection popup



SCREEN COMPONENTS



- Select applicable grouping module
- Jump to Activity code to create a new one

Code *	Link type
EMDA_ARAGE	URL
Description	Evaluated title
EMDA AR Aging	
XSL type	Parameter code
Module	Activity code
A/P-A/R accounting	
Address	Location
	World wide web

- Create ZEMDA activity code
Activity codes will act as a category that can be searched and grouped. Custom codes should start with a Z. This will make these modifications easily identifiable if the integration of EMDA needs to happen on more than 1 instance of EM. A patch can be created by exporting by activity code to be used to import into another deployment.

Activity codes

Activity code *	Description	Active
ZEMDA	EMDA	<input checked="" type="checkbox"/>

Characteristics

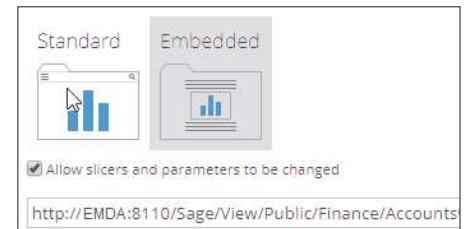
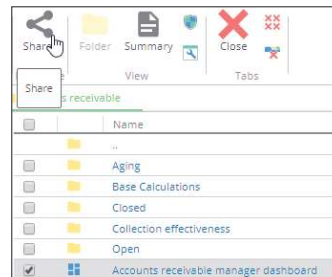
Module	Sequence	Type
Common Data		Functional
Minimum size	Maximum size	Screen size
Dependency	Activity code	Formula
None		

New
Save
Create
Delete
Cancel
Copy
Document
Paragraphs
Links
Generation

SCREEN COMPONENTS



- Get the URL from EMDA
 - Open the folder with the resource
 - Click share
 - Copy the 'Embedded' url
 - To pass the customer number to the dashboard add
Customers].[Customer].&["+M]BPCNU
M+"] " to the end of the url



- Paste the URL in the address with
a =" at the beginning
- Set the Security to 'Low'
- Create

Screen components

Code * EMDA_ARAGE Link type URL

Description EMDA AR Aging Evaluated title

XSL type Parameter code

Module A/P-A/R accounting Activity code ZEMDA

Address ge/View/Public/Finance/Accounts' Location World wide web Security level Low

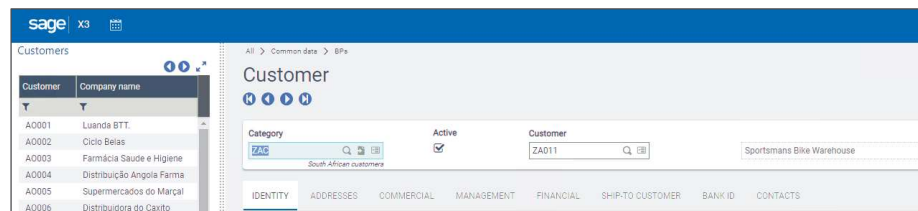
New
Save
Create
Delete
Cancel
Copy
Use
Selection
Utilities
Browsing
Reports
Help

IDENTIFY COMPONENT LOCATION



Identify the screen you would like to add the url to. In this example I'd like to add AR Aging to the customer screen on a tab similarly to Contacts

- Navigate to the Customers screen



- Click on any field and click ESC+F6
This will provide the screen the field resides on. We need the main screen to identify where to group the screen. The window which we will edit in a future step typically has a similar naming convention but starting with a O(BPC).



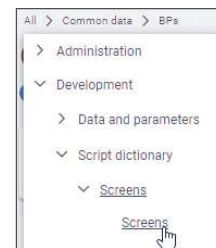
CREATE SCREEN



- From the top navigation within the Menu Items go to All>Development>Script Dictionary>Screen>Screens

By searching the BPC screens we can identify the different customer screens. We'll want to create a screen that fits into the same naming convention for consistency.

- Click new on the far right



Screen code	Screen title
BPC	
ADRBPC	Customer address
BIDBPC	Bank ID(s)
BPABPC	Addresses
BPC0	Customers
BPC1	Commercial
BPC2	Management
BPC3	Financial
BPC4	Ship-to customer
BPC5	Assignment
BPC6	Cust-product
BPCDUD	BP Invoice due date
BPCMYT	Resynchronize customer b
BPCOST	Calculation details
BPCREDIT	Customer hold/release
BPCVAL	Invoice validation
BPRBPC	Identity
CNTBPC	Contacts
SBPCALL	Customer reservation man
WNYXLSBPC	Query tool

CREATE SCREEN



- Populate screen as shown below

Note: Click ok on pop up

warning

Warning

Reserved code (STD)

All > Development > Script dictionary > Screens

Screen dictionary

SAGE

Screen code *

BPC/

Description

EMDA AN AGING

Templ. screen

☐

GENERAL

FIELDS

Characteristics

Activity code

ZEMDA

Module

Common Data

Size

Tab

25

74

ZEMDA

Scripts

Standard script *

SUBBPC7

Vertical script

Specific script *

SPEBPC7

Blocks

	Block title	Block type	P...	U...	C...	H...	...	S...	L...	Act	Line	Options	Parameter	Representation
1		Browser	1,1	1	1			5	15	ZEMDA			BPSHO	
2														

Reference tables

	Reference tables	Table title
1		

EDIT WINDOW



- From the top navigation within Screens navigate the site map to Development>Script Dictionary>Window
- Search the description Customer and select the OBPC window

Based on the prior field search step we know that the window is likely going to have a similar naming convention to BPC

Window management

Window: OBPC Description: Customer

SCREENS BUTTONS/MENUS PREDEFINED BUTTONS BROWSER

Window template: ☐ Active: ☒ VT window: ☐ Access code: Object:

Activity code: Module: Transaction: Transaction title:

Window type: Display: Inquiry:

Screens to open:

Header screen:

Tab:

	Tab	Screen title	Tab title	...	Visible	Activity
1	BPRBPC	Identity	Identity	5	Yes	
2	BPAAPC	Addresses	Addresses	10	Yes	
3	BPC1	Commercial	Commercial	15	Yes	FTC
4	BPC2	Management	Management	20	Yes	
5	BPC3	Financial	Financial	25	Yes	
6	BPC4	Ship-to customer	Ship-to customer	30	Yes	FTC
7	BIDBPC	Bank ID(s)	Bank ID	35	Yes	
8	CNTBPC	Contacts	Contacts	40	Yes	
9						

EDIT WINDOW



As we can see by the tabs it mimics the tabs on the Customer screen

Window management

Window

Description

Map

customer

ADBPFC

Free customer address entry

DEPCMTVT

Customer balances resync

DPFONCDIT

Customer hold/release

FBPCALL

Customer allocations

IADBPFC

Free customer address entry

OBPC

Customer

Window

Description

OBPC

Customer

SCREENS

BUTTONS/MENUS

PREFINED BUTTONS

BROWSER

Window template

Active

VT window

Access code

Object

Activity code

Module

Transaction

Transaction title

Window type

Display

Inquiry

Screens to open

Header screen

Table

Customer

8 Results Display: 15

	Title	Screen title	Title title	St.	Visible	Activity
1	SPRSPC	Q	Identity	5	Yes	Q
2	SPRSPC	Q	Addresses	10	Yes	Q
3	BPC1	Q	Commercial	15	Yes	FTC
4	BPC2	Q	Management	20	Yes	Q
5	BPC3	Q	Financial	25	Yes	Q
6	BPC4	Q	Ship-to customer	30	Yes	FTC
7	BIDBPFC	Q	Bank ID(s)	35	Yes	Q
8	ONTBPC	Q	Contacts	40	Yes	Q
9		Q				Q

Customer

Category

Active

Customer

South African customers

Sportsmans Bike Warehouse

IDENTITY

ADDRESSES

COMMERCIAL

MANAGEMENT

FINANCIAL

SHIP-TO CUSTOMER

BANK ID

CONTACTS

EDIT WINDOW



- Add new tab for EMDA AR Aging Screen

Note: the tab tile will be the tab name on the customer screen

Window management

Window: BPC Description: Customer

SCREENS BUTTONS/MENUS PREDEFINED BUTTONS BROWSER

Window template: ☐ Active: ☒ VT window: ☐ Access code: Object:

Activity code: ZEMDA Window type: Object

Module: Common Data Display: Full screen

Transaction: Transaction title:

Inquiry:

Screens to open:

Header screen:

Customer

1	2	3	4	5	6	7	8	9
Tab	Screen title	Tab title	St.	Visible	Activity			
BPRBPC	Identity	Identity	5	Yes				
BPABPC	Addresses	Addresses	10	Yes				
BPC1	Commercial	Commercial	15	Yes	FTC			
BPC2	Management	Management	20	Yes				
BPC3	Financial	Financial	25	Yes				
BPC4	Ship-to customer	Ship-to customer	30	Yes	FTC			
BIDBPC	Bank ID(s)	Bank ID	35	Yes				
CNTBPC	Contacts	Contacts	40	Yes				
BPC7	EMDA AR AGING	EMDA Aging	45	Yes	ZEMDA			

Close page

New

Save

Create

Delete

Cancel

Validation

Copy

Preview

Validation

Global validation

Selection

Utilities

Browsing

Reports

Help

- Save – the window will auto validate

VERIFY WINDOW CHANGE



Navigate back to the Customer and verify the EMDA Aging tab added is present and when clicking between customers the dashboard updates

