1. About Event Wizard

Welcome to Event Wizard

We developed this tool in response to demand from Oracle Projects users for a user friendly and robust spreadsheet tool to load Revenue and Billing Events into Oracle Projects module.

Event Wizard is a VBA program embedded in a Microsoft Excel workbook. It is a close cousin to our other 'Wizard' products and shares the same look and feel.

Features

All options are available on a ribbon/toolbar.

Double-clicking in the spreadsheet loads the Event form for data-entry. The data-entry form is optional; you can also simply type, import, or paste the values directly into the spreadsheet.
You can choose to upload Events one at a time, to upload a range of events, or your entire worksheet.

The program is flexible about the spreadsheet layout. You can move, delete, or hide unwanted columns. You can also have multiple sheets or even sheets in other workbooks.

A download function is available to extract existing events. You can update the information (within the Wizard) and reload it into Oracle.

The spreadsheet contains a status column, enabling you to accurately track and correct your records as they interface into Oracle HRMS.

This program has been developed on R11i but has been back-ported to R11.0.3 (which uses ODBC connection technology). It is also supported on E-Business Suite 11.5.10 onwards (i.e. 11.5.10, 12.0.*, 12.1.*, 12.2.*). Please contact us to supply versions for prior releases of Oracle.

If you encounter any problems or have any suggestions, please do not hesitate to contact us at http://www.more4apps.com/request-technical-assistance/

Trial Version

The trial version of this program is fully functional and has no time-out. It does however only upload 5 events at a time before stopping. To continue the upload you must log in again.
The form and download options are not constrained in the trial version at all.

<u>Disclaimer</u>

This section is only relevant if you are on an Oracle Projects release prior to Family Pack L.

There is no API prior to 11.5.9 PA.L for Events. We wrote our own API based on the internal Oracle procedures. Accordingly, Oracle Support does NOT support use of this program prior to P.A.L.

You are responsible for testing the product on your own data. We take no responsibility for any damage whatsoever, as indicated by our end user licence agreement.

2. Overview – Steps to Loading Events

Once the Event Wizard has been installed for your instance of Oracle Applications, the following steps outline the basic procedure for loading revenue and billing events using Event Wizard.

Steps to load Events:

1. Open the Workbook, click on the 'New Sheet' button.
   This can be found on the Event Wizard ribbon.
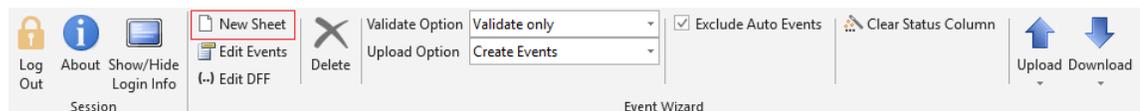
2. Login – Connect to your Oracle Applications instance.

   Refer to section: Logging In and Out

3. Optionally, customize your set up.
   This step is optional and only needs to be done once for a workbook.

   Refer to section: Setup the Template
   Refer to section: Customize Fields
   Refer to section: Customize Your Lists of Values
   Refer to section: Number Formats

4. Create/Update the Events.

   Refer to section: Enter Events
   Refer to section: Descriptive Flexfields

5. Upload the Events.

   Refer to section: Upload Events

6. Correct errors after uploading the Events.
   This step is only required if there are errors.

   Refer to section: Error Handling and Validation

There are also several reference sections in this document for further information:

- Getting Started

- Profile Options

- Ribbons

- Toolbars

- Trouble Shooting

- [Licence Keys, Named Users & Installation](#)

- [Release Notes](#)

3. Logging In and Out

This section is common to all of our tools.

Click on this link to navigate to [Common User Instructions: Logging In and Out](#)

4. Security

If you do not have access to the highlighted functions below in your selected responsibility, you will be stopped from performing certain operations in Event Wizard.

Without the Project: Events function, you will not be allowed to submit an Event for Import.
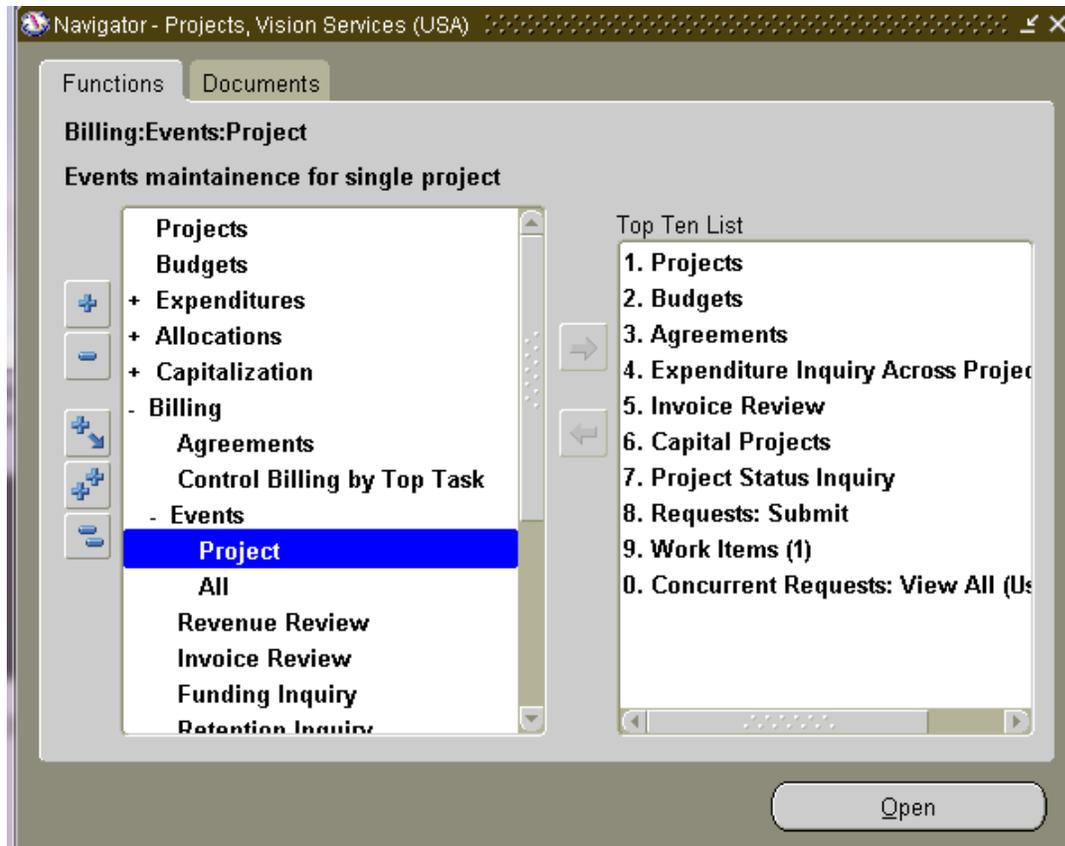
5. Setup the Template

This is standard functionality and to read more about making changes to 'Template123' refer to Common User Instructions: Customize the Template Sheet.

Refer to section: Customize Fields
Refer to section: Default Values

5.1 Customize Fields

To set optional fields to mandatory click on the 'Customize Fields' button on the Event Wizard - Setup ribbon:
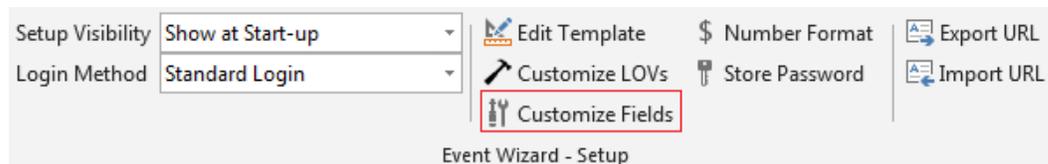
A form is displayed showing the list of optional fields that can be changed to mandatory.

These fields can be made mandatory by checking the corresponding box:

Use this form to select the sections and columns that you would like to appear in your specific worksheet.

A column can be made mandatory by checking the mandatory checkbox. This will make this value compulsory when uploading the data into Oracle.

Click **'Create Sheet'** button to create a new worksheet based on your selection.
Click **'Cancel'** button to not save your selection but close the form.
Click **'OK'** button to close the form.

To later create another worksheet based on the selection, simply open this form and click on the 'Create Sheet' button again.

Default Values
Event Wizard provides you with the ability to enter default values in Row 10.
(Refer to section: Default Values)

Refer to section: Setup the Template

6. Enter Events

The Event Wizard allows the user to load Revenue and Billing Events into Oracle Projects. You can type directly into the sheet or enter data into the Events Form.

Refer to section: [Methods of Entering Data into the Worksheet](#)
Refer to section: [Enter Events](#)
Refer to section: [Delete Events](#)
Refer to section: [Download Events](#)
Refer to section: [Upload Events](#)
Refer to section: [Default Values](#)

6.1 Methods of Entering Data into the Worksheet

There are three ways to populate information in the worksheet:

a) Import, type or paste data directly into the cells provided. No validation is performed until you run the upload program or open the 'Events' form.

b) Use the 'Events' form to enter the data into the event. Data is validated and lists of values are available. To enter data in this way first position your cursor on the row you wish to contain the event data. Then double-click in one of the cells or alternatively click on the ribbon button.

c) Use the 'Download Events' form or 'Download from sheet' option to download existing events. You can then use one of the methods above to update the events information.

Refer to section: [Enter Events](#)
Refer to section: [Delete Events](#)
Refer to section: [Download Events](#)
Refer to section: [Upload Events](#)
Refer to section: [Default Values](#)

6.2 Enter Events

Position the cursor on the row you wish to enter the Event data (below row 10). Then double-click in one of the cells that will contain the values. Alternatively click on the 'Edit Events' button. You can also enter data directly into the cells in the workbook or copy and paste data in.
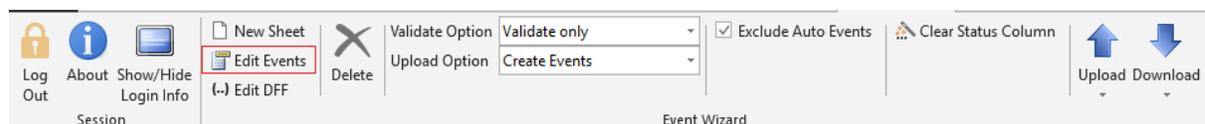
The following form will appear:

Event Tab

The following table describes how to enter specific information in the Event form fields:

Field Name	Description
Project	The Project field is used to select the relevant Project Number and Project Name. Enter a search string into the field using '%' as the wildcard (it will search across both Project Names and Project Numbers). Click on the search button [...]. This will populate the drop-down list. Use the drop-down to select the correct project.
Task	The Task field is used to select the relevant Task Number and Task Name. Click on the search button [...]. This will populate the drop-down list with tasks for the selected project. Use the drop-down to select the correct task.

	This step is optional - you do not have to associate an event with a task (unless you change the workbook setup using the 'Mandatory Fields' button).
Event Number	A number for the Event. This will automatically populate but is updateable. The number should be unique for the Project and Task.

Event Numbers must be greater than 0 and cannot be changed once the Event is billed or revenue generated.

This field is optional in Create mode. If left blank the upload will generate the next available number for the combination of Project and Task numbers. |
| Event Type | Select the Event Type from the list. |
| Event Date | The date the Event is eligible for processing.

This step is optional - you do not have to enter an Event Date (unless you change the workbook setup using the 'Customize Fields'). |
Adj Revenue Flag	Check the 'Adj Revenue' check box if you are entering an event to adjust revenue amount.
Rev Dist Flag	Indicates whether this Events revenue has been distributed.
Billed Flag	Indicates whether this Event has been billed.

The following table describes the purpose of each button in the Event tab on the form:

Button Name	Description
Ok	Selecting this button will close the form and the new values will be written into the corresponding cells in the worksheet. Any fields highlighted in red that have failed validation, will not be written into the worksheet.
Cancel	Selecting this button will close the form and no changes will be written into the corresponding cells in the worksheet.

Currency Tab
Use this form to enter your Multi-Currency information:

The following table describes the purpose of each field in the 'Currency' tab on the form:

Field Name	Description
Currency	The Currency field is used to select the relevant Currency. This field will default to the Projects base currency (on upload) but if the Project is Multi-Currency enabled, you can change it by selecting a value from the drop list. If you select a Project that is not Multi-Currency enabled and you enter a different 'Currency Code', a message 'Project is Not Multicurrency enabled' will display in the 'Upload Message' column on exiting the form or on upload.

The following table describes the purpose of each button on the 'Currency' tab in the form:

Button Name	Description
Ok	Selecting this button will close the form and the new values will be written into the corresponding cells in the worksheet. Any fields highlighted in red have failed validation.
Cancel	Selecting this button will close the form and no changes will be written into the corresponding cells in the worksheet.

Refer to section: Delete Events
Refer to section: Methods of Entering Data into the Worksheet
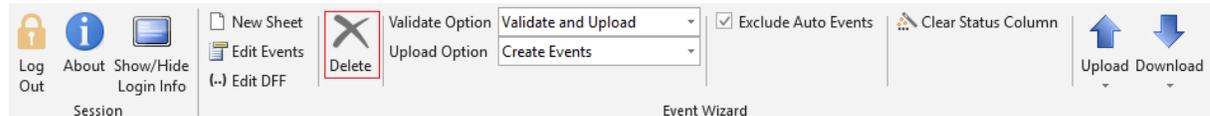Refer to section: Download Events
Refer to section: Upload Events
Refer to section: Default Values

6.3 Delete Events

Event Wizard gives you the option to delete Events from the Oracle Project application.

Place the cursor on the row of the event you wish to delete and click on the 'Delete' button from the ribbon. It doesn't matter what 'Upload Option' is selected.

'*Accepted*' will display in the 'Upload Status' column and the 'Upload Message' column will populate with '*Deleted Event*'. All information for the Event will have been deleted in Oracle Projects.

Refer to section: Methods of Entering Data into the Worksheet
Refer to section: Enter Events
Refer to section: Download Events
Refer to section: Upload Events
Refer to section: Default Values

6.4 Default Values
Row 10 of the Wizard is reserved for Default Values. Any data rows below Row10 will be populated with default values if they are blank. This occurs when validation is initiated on the worksheet and also when the data entry form is opened.

Any values that exist in the Default Values (Row10) where the column is hidden, will default to your data entry rows.

Standard validation will apply if the defaulted value is not valid for the field.

Default data can be derived from either:

1. Any manually entered value

Upload Results		Section	
Process Status	Process Messages	Column1	Column2
Default Values		01/01/2014	Value

2. A formula i.e. =TODAY()

Upload Results		Section	
Process Status	Process Messages	Column1	Column2
Default Values		=TODAY()	

3. A Profile Option i.e PROFILE: <Profile Name>

Upload Results		Section	
Process Status	Process Messages	Column1	Column2
Default Values		PROFILE: <Profile Name>	

Note: A PROFILE query must be prefixed with PROFILE: otherwise an error will be returned.
<Profile Name> is the profile name and not the 'User Profile Name' value. For example the profile: GL Ledger ID has a profile name of 'GL_SET_OF_BKS_ID'

Refer to section: Methods of Entering Data into the Worksheet
Refer to section: Enter Events
Refer to section: Delete Events
Refer to section: Download Events
Refer to section: Upload Events

7. Download Events

There are two options provided by the Event Wizard to download existing Events from Oracle Projects. The information can subsequently be modified and reloaded.

Option 1: Download Using Form Based Selection Criteria

Place your cursor somewhere in the sheet below row 10. Data will be downloaded at this point, pushing all existing rows downwards. Click on the 'Download' icon and select 'Download Form'.
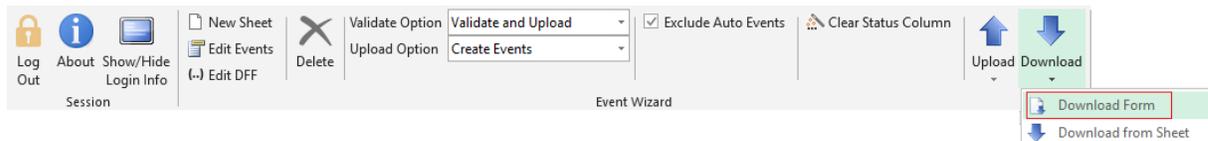
The following form will appear:

Enter criteria into one or more of the fields above, to select the relevant event.

Once the selection criteria have been entered into the relevant field(s), click on the 'Download' button. The events that meet the criteria will be extracted into the worksheet.

Update these events by keying directly into the fields, or double-click on the transaction to open the data-entry form.

Option 2: Download Using Spreadsheet Selection Criteria

As an alternative to the Download form, you have the option to download Events based on data in the spreadsheet. This download method relies on the values specified in the column. This option is currently limited to the following columns: Project Number, Task Number, Event Number, Event Class, and Event Type. Of course this can be expanded, so please ask if you require additional columns in the selection criteria.

Note – When using the 'Download from Sheet' option in the Wizard, the 'Default Values' row (Row 10) is not used.

Enter the criteria for the download directly into the worksheet.

Select the rows to download and click the 'Download' button and select 'Download from sheet', as shown below:
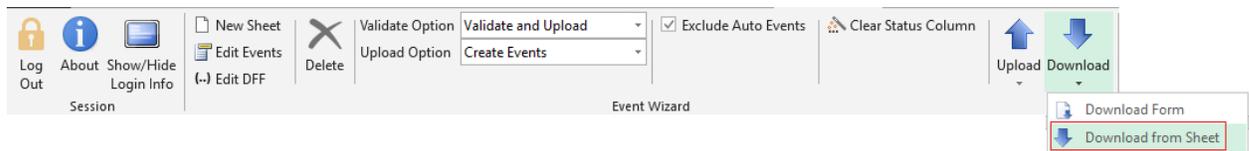
The results of the download are returned directly to the highlighted range.

Refer to section: Methods of Entering Data into the Worksheet
Refer to section: Enter Events
Refer to section: Delete Events
Refer to section: Upload Events
Refer to section: Default Values

8. Upload Events

You first need to select on the ribbon the function that you need the Wizard to perform. The choices are:

- '**Validate only'** will perform validation on every populated field and set any applicable default when an empty field is encountered. This allows the user to perform a test run that validates the selected records but does not upload the records.

- '**Validate and Upload'** will perform validation as per the 'Validate only', but will continue to load the records. Every validated transaction is sent to Oracle and an Event Id is retrieved when successful.
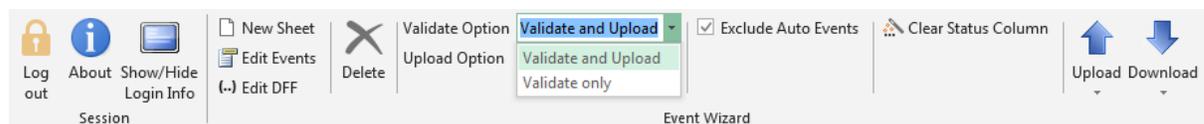
There are three ways of selecting which Events will be uploaded (i.e. created or updated):

- A Single Event
- A Range of Events
- All Events on the Worksheet

Each method performs the same steps within the selection. Consequently, they only differ by the scope of the selection. These three options are described in the following sections:

Refer to section: Upload a Single Event
Refer to section: Upload a Range of Events
Refer to section: Upload All Events
Refer to section: Error Handling and Validation

8.1 Upload a Single Event

Place your cursor anywhere on a row containing the Event you wish to upload. Choose 'Validate only' or 'Validate and Upload' from the ribbon.
Click the 'Upload' icon and select 'Upload Selected'.

The event will be Updated/Created.

Refer to section: Upload a Range of Events
Refer to section: Upload All Events
Refer to section: Error Handling and Validation

8.2 Upload a Range of Events

Use the cursor to select your range of events to upload, making sure you have included the first line of each event to be uploaded. Event Wizard looks through the spreadsheet only between the top and bottom of the range you have indicated.
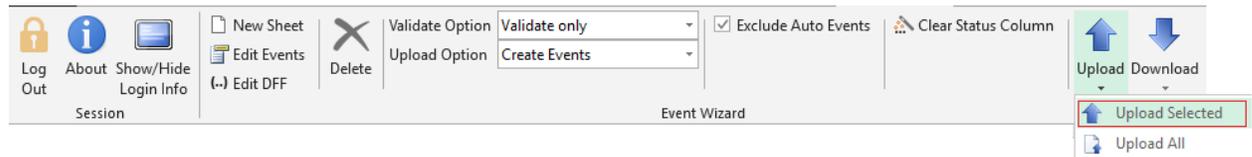
If you have selected a range and only included the first line of the last event to be uploaded, Event Wizard will continue past the end of the selected range if necessary to complete the last event. The columns selected are NOT important.

Choose 'Validate only' or 'Validate and Upload' from the ribbon. Click on the 'Upload' icon and select 'Upload Selected'.
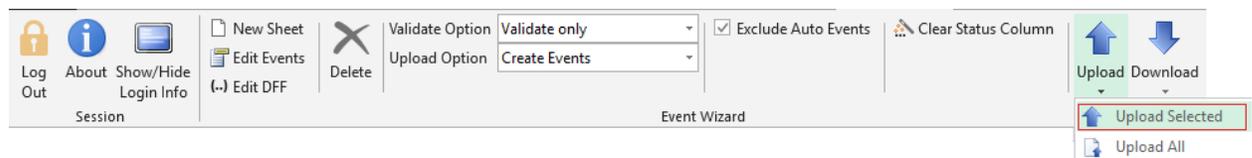
The selected events will be Updated/Created.

Refer to section: Upload a Single Event
Refer to section: Upload All Events
Refer to section: Error Handling and Validation

8.3 Upload All Events

Place your cursor anywhere in the sheet. Event Wizard ignores the cursor location and goes straight to row 10 to begin uploading.

Choose 'Validate only' or 'Validate and Upload' from the ribbon. Click on the 'Upload' icon and select 'Upload All'.
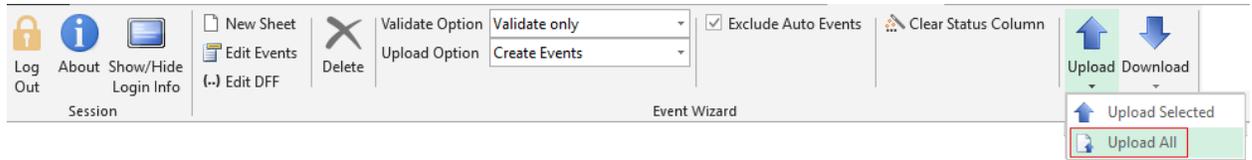
This upload option ignores the cursor location and goes straight to row 10 to begin uploading. It ignores any rows with '*Accepted*' data.

Refer to section: [Upload a Single Event](#)
Refer to section: [Upload a Range of Events](#)
Refer to section: [Error Handling and Validation](#)

9. Error Handling and Validation

There are two levels of validation:

- Spreadsheet Validation - The Event form and Descriptive Flexfield form perform some validation. This includes lists of values, some formatting rules and other validation rules.

- Upload Validation - The upload process will perform the spreadsheet validation above as well as the validation within the API.

Data keyed directly into the worksheet (not via the Event form) will be validated when it is uploaded.   If you wish to check anything before it is uploaded, simply open the form.

Refer to section: Status and Message Columns
Refer to section: Correcting Errors and Reloading
Refer to section: Upload Events

9.1 Status and Message Columns

Every worksheet will be created with an 'Upload Status'. The 'Upload Status' is used to record the overall status for each Event. The 'Upload Status' may be:

- **Blank** – Prior to running the validate/upload process.

- **Validated** - When validation has been run and no errors are reported.

- **Accepted** – All the information for this event has been successfully loaded, updated or deleted in Oracle Projects.

- **Error** - All the information for this event has not been successfully loaded into Oracle Projects. Any incorrect data will appear in red in the worksheet cell and in the form.

In the following example one event has an error as the event type was not valid. All other events were successfully processed.

Upload Status	Upload Message	Event ID		Project Number	Project Name	Task Number	Task Name	Event Number	Event Type	Event Date
Default Values										
Accepted		105988		Cost Plus	Cost Plus Project			1	Retainer	
Accepted		105989		Cost Plus	Cost Plus Project			2	Retainer	
Accepted		105990		Cost Plus	Cost Plus Project			3	Retainer	
Accepted		105991		Cost Plus	Cost Plus Project			4	Retainer	
Accepted		105992		Cost Plus	Cost Plus Project			5	Retainer	
Accepted		105993		Cost Plus	Cost Plus Project			6	Prebill	
Error	The value [Banana] is not in			Cost Plus	Cost Plus Project			7	Banana	
Accepted		105994		Cost Plus	Cost Plus Project			7	Retainer	
Accepted		105995		Cost Plus	Cost Plus Project			8	Retainer	
Accepted		105996		Cost Plus	Cost Plus Project			9	Retainer	

Refer to section: <u>Correcting Errors and Reloading</u>
Refer to section: <u>Upload Events</u>

9.2 Correcting Errors and Reloading
Correcting Rejected Data

If you have an '*Error*' status in the 'Upload Status' column, look for the cell that is highlighted red and investigate and correct the data.

To correct the information either key directly into the worksheet, or open the Event Form.

Once the data has been corrected you can choose to either upload one row, selected rows or the entire worksheet.
Refer to section: <u>Upload Events</u>

Events that already have an Upload Status of '*Accepted*' will not be processed again. Continuing the previous example after correcting the data and rerunning the upload process will show all records are successfully transferred into Oracle Projects.

Upload Status	Upload Message	Event ID	Project Number	Project Name	Task Number	Task Name	Event Number	Event Type	Event Date
Default Values									
Accepted		105988	Cost Plus	Cost Plus Project			1	Retainer	
Accepted		105989	Cost Plus	Cost Plus Project			2	Retainer	
Accepted		105990	Cost Plus	Cost Plus Project			3	Retainer	
Accepted		105991	Cost Plus	Cost Plus Project			4	Retainer	
Accepted		105992	Cost Plus	Cost Plus Project			5	Retainer	
Accepted		105993	Cost Plus	Cost Plus Project			6	Prebill	
Accepted		105997	Cost Plus	Cost Plus Project			10	Manual	
Accepted		105994	Cost Plus	Cost Plus Project			7	Retainer	
Accepted		105995	Cost Plus	Cost Plus Project			8	Retainer	
Accepted		105996	Cost Plus	Cost Plus Project			9	Retainer	

Refer to section: <u>Status and Message Columns</u>
Refer to section: <u>Upload Events</u>

10. Ribbons

There are two ribbons for Event Wizard:

- **Event Wizard - Setup Ribbon** is used to help set up the Wizard.

- **Event Wizard Ribbon** is used to carry out functions when working in your workbook.

The menus are also available using the right mouse click functionality within Excel. If you press the right mouse button you will see the Event Wizard ribbon options.
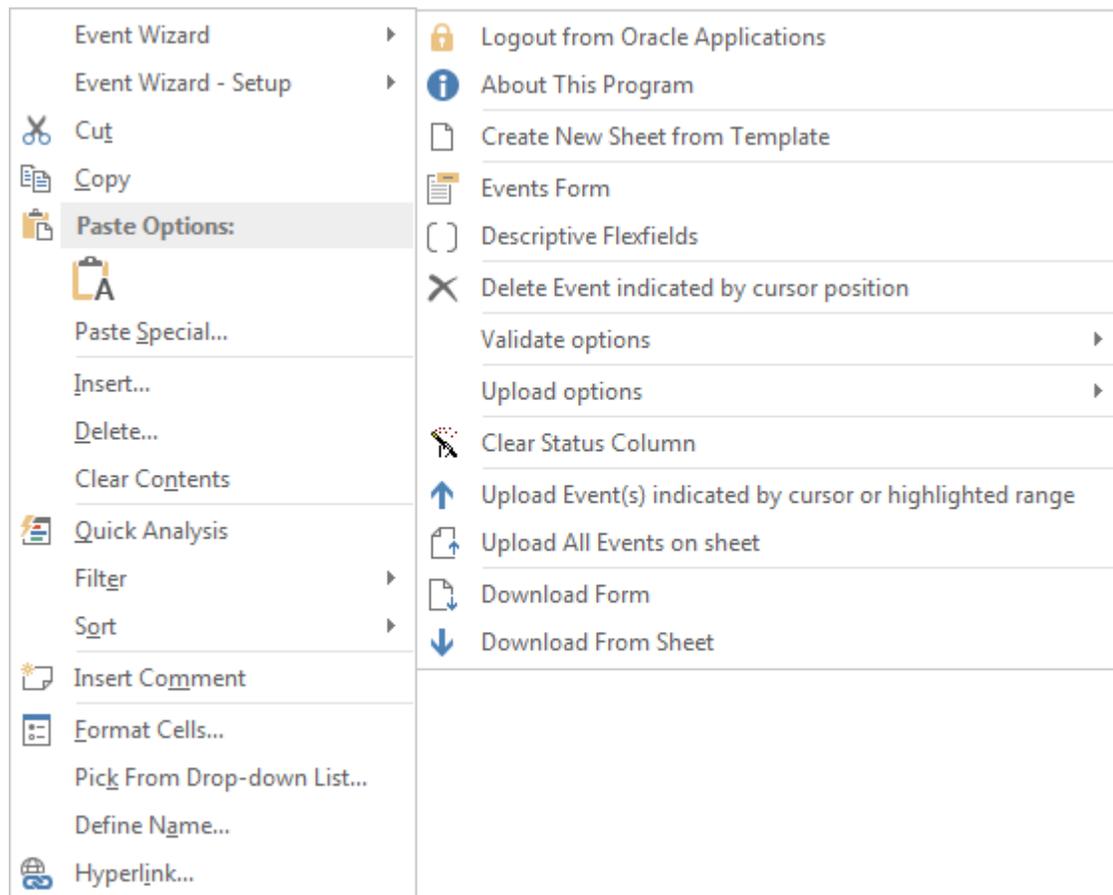
Refer to section: Event Wizard - Setup Ribbon
Refer to section: Event Wizard Ribbon

10.1 Event Wizard - Setup Ribbon

The following table provides a quick reference to the Event Wizard – Setup Ribbon and its functions.

<table>
<tr>
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Excel 2007 and Later

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</tr>
<tr>
<th>Icon</th>
<th>Description/Functionality</th>
</tr>
<tr>
<td>

Setup Visibility

</td>
<td>

Once your set-up is done you may not want your users to change the set-up so you can hide the setup ribbon.

There are three options:

- **Show at Start-up** – The setup menu always appears.

- **Hide at Start-up** – The setup menu is hidden but can be found using:
     View -> Macros -> Show_Event_Wizard_Toolbars ->
      and then click 'Run'

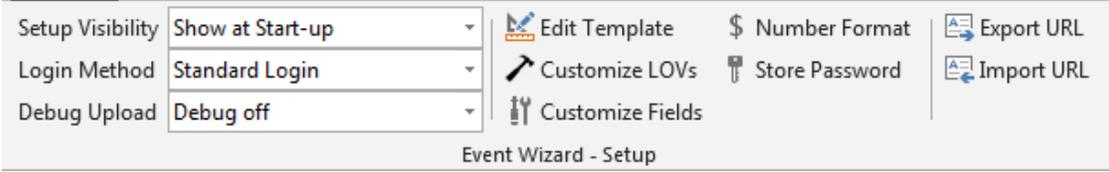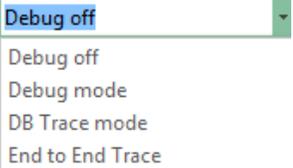- **Hide Permanently** – The setup menu is hidden and cannot be displayed. Revert back to a copy of the original workbook to display the menu.

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Login Method

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Choose one of three methods for logging in:

- **Standard Login** – This will use single sign-on where available.

- **Alternative Login** – This will use application level sign-on.

- **Standard Login (SSO Bypass)** – This will use single-sign-on Bypass. This login method is available from Oracle EBS 11.5.9 onwards and can be used if you have SSO installed but want to bypass the SSO mechanism. The user will be authenticated to the internal FND_USERS table rather than the external SSO.

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</table>

Debug Upload Debug off ▾ Debug off Debug mode DB Trace mode End to End Trace	For the 4x 'Debug Upload' options mentioned below, the user will be under instruction from More4Apps Support (used for Support purposes only). The default value is 'Debug off' unless instructed by More4Apps to change: • **Debug Mode** – Turns on the More4Apps debug facility to generate debug messages to assist with product troubleshooting. • **DB Trace mode** – Generates a database trace for database Version 9i. • **End to End Trace** – Database trace generated for performance analysis and product troubleshooting. • **Debug Off** – Disables any of the above options that are enabled.
Edit Template	Show or Hide Template worksheet. If you modify the template worksheet, subsequent worksheets created using the 'New Sheet' icon will be based on this template.
Customize LOVs	This button will open a form to allow you to customize your list of values.
Customize Fields	The customize fields option allows you to make optional fields mandatory.
Number Format	Record the format of the current cell to use numeric values for the Amount/Quantity columns in the Wizard. You need to save the spreadsheet to keep the setting.
Store Password	You can protect your worksheet after data-entry to prevent further changes. However, you must store the password in order to use the upload/validate functions.

	Click on this icon and store the password that you have used to protect the worksheet.
	For further information refer to
	[Common User Instructions: Worksheet Protection](#)
Export URL	Export Login Configuration Settings to New Sheet.
	The login configuration allows you to store links to multiple instances of Oracle Applications. Create a new blank sheet (insert worksheet) and click on this icon. The current login configuration will be copied into cell A1. This can then be copied into another workbook (into cell A1) and imported using the option below.
Import URL	Import Login Configuration Setting from Current Sheet.
	The login configuration that has been copied into cell A1 of the current sheet will be used to set up the list of instances available in this workbook.

Refer to section: [Event Wizard Ribbon](#)

10.2 Event Wizard Ribbon

The following table provides a quick reference to the Event Wizard Ribbon and its functions.

Excel 2007 and Later

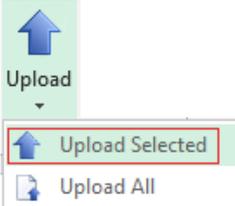| Icon	Description/Functionality
Log In/Log Out	This will either log you into or out of EBS depending on your status (terminate or reinstate your Oracle database connection). The icon will change depending on your current status. If you are currently logged in then the icon will show as 'Log Out'. If you are not logged in the icon will show as 'Log In'.
About	Displays version and licencing information. You need to click on this icon to load a new licence key or modify the list of named users.
Show/Hide Login Info	This button toggles the display of the 'Login Info' information on the ribbon.
New Sheet	A new worksheet will be created based on the master template sheet. If you have not modified the master template (using the 'Show/Hide Template' icon above) all columns available will be displayed. If you have modified the master template, your new worksheets will include these changes.

Edit Events 🗒	A form to enter the event information will display. If you do use this form, you can make use of the 'Lists of Values' and other validation as you are entering data. Double click in the worksheet below row 9 will give same result.
Edit DFF (..)	A form will open to enable the flexfield information to be entered against the fields. You do not have to use this form, you can copy and paste or key directly into the fields if you prefer.
Delete ✕	This button will enable you to delete selected events from Oracle Projects.
Validate Option Validate and Upload ▾ Validate and Upload Validate only	Choose whether to 'Validate and Upload' or 'Validate only' when uploading lines into Projects. This selection is used in conjunction with the 'Upload Selected' rows icon and the 'Upload All' rows icon (below).
Upload Option Create Events ▾ Create Events Update Events Create and Update Events	Choose whether to 'Create Events', 'Update Events' or 'Create and Update Events' when uploading lines into Projects. This selection is used in conjunction with the 'Upload Selected Rows' icon and the 'Upload all rows' icon (Below). **Note** the following when using: **Update Events** – Using 'Update Events' an Event without Currency information on the sheet, the user will receive an error 'Currency Code field must not be null when updating Events'. **Create and Update Events** – Using 'Create and Update Events' and updating an Event without Currency information on the sheet, the Event will upload successfully as there's an extra validation step in the process and it picks up the base currency in that validation step.
☑ Exclude Auto Events	This icon excludes 'AUTOMATIC' Events from the 'Download from Sheet'.
⁘ Clear Status Column	This icon enables you to remove status column information from the worksheet.

Upload Selected Upload ⬆ Upload Selected 📄 Upload All	The selected rows (as indicated by the cursor) will be validated/loaded into the interface table.
Upload All Upload ⬆ Upload Selected 📄 Upload All	All rows in the worksheet (that have not already been processed) will be validated/loaded into the application.
Download Form Download ⬇ Download Form ⬇ Download from Sheet	A form will open that will enable you to choose event information from Oracle and populate into the worksheet.
Download from Sheet Download ⬇ Download Form ⬇ Download from Sheet	Download data based on data in the spreadsheet. This download relies on the values specified in the column.
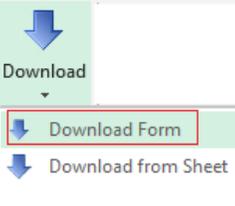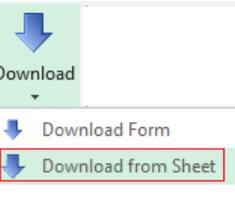
Refer to section: Event Wizard - Setup Ribbon

11. Getting Started

This section provides a new user with tips on how to get started using the Event Wizard.

1. **Enable Macros** – The worksheet requires the macros to be enabled.

    Microsoft 2007 or Later – When the worksheet is first opened on the menu bar the following will appear. Click on the 'Enable Content' button.

    Microsoft 2003 – When the worksheet is first opened the following message will appear. Click 'Enable Macros'.

2. **Unable to see Wizard Ribbons/Toolbars -** If this occurs then your security settings are too high. Event Wizard is written in VBA, and you must allow macros to run before you can run the program. Close the worksheet then from the Excel menu navigate to the following based on your version of Microsoft:

    Microsoft 2007 or Later - Navigate to the 'Developer' tab, in the 'Code' group, click 'Macro Security'. In 'Macro Settings', select the 'Disable all macros with notification'. Reopen the worksheet and you will receive the message shown above.

    Microsoft 2003 – Navigate to **Tools> Macro> Security> Security Level** and set to Medium level. Reopen the worksheet and you will receive the message shown above.

    Note: If the Developer tab did not display, click the Microsoft Office button , then click 'Excel Options' button. In the 'Popular' category, select 'Show Developer tab on the Ribbon'. You should now be able to go back to the Developer Tab to make the security changes.

    Refer to section: Enable Macros/Cannot Access Wizard Ribbons

3. **Wizard Ribbons/Toolbars –** Please see the note below for details on the ribbons/toolbars provided by the Wizard.

   Refer to section: [Ribbons](#)
   Refer to section: [Toolbars](#)

4. **Trial Version** - If you are using the trial version it will log you out after 5 records have been uploaded. You will need to log in again to continue. There are no other constraints in the trial version.

5. **Row 9** - The column names are stored in row 9. This is fixed and cannot be changed. Do NOT insert or delete rows before row 10. The case of the names is not important but spelling is. If you change the contents of row 9 in any column, you have in effect deleted the column as far as the program is concerned. You can move the columns anywhere you like, hide, or even delete them.

6. **Row 10** - This row is used to enter Default Values. Any data here will be defaulted into the same record where no data exists in the worksheet.

7. **Populate the Worksheet** - There are a number of options available to populate the worksheet:

   - Type or paste the relevant values directly into the worksheet (No validation is performed until you run the upload program).
   - Use the data entry forms provided to enter and validate the values.
   - Download existing data and modify the information to update the record, OR
   - Download existing data and use this as the starting point to create new records. Note - If you are downloading an existing record to create a new one you need to remove the IDs of the existing records.
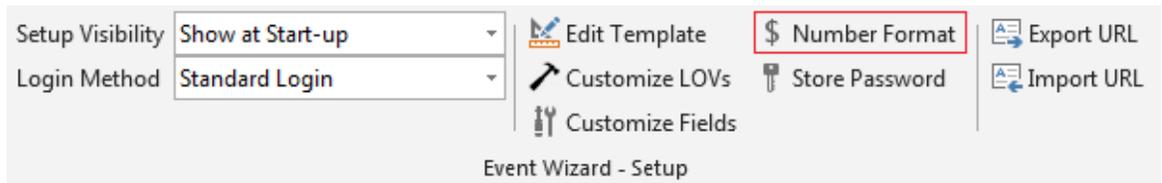
   Refer to section: [Enter Events](#)

8. **Descriptive Flexfields (DFF's)** - In this Wizard only a couple of attribute flexfield columns are displayed in order to reduce unnecessary clutter.   For help on using DFF's please refer to the online documentation.

   Refer to section: [Descriptive Flexfields](#)

9. **Trouble Shooting** - If you are having any problems using the Wizard, click on this link to search our online solutions repository
   http://www.more4apps.com/Support/Solutions.html

If you encounter any problems or have any suggestions, please do not hesitate to contact us at http://www.more4apps.com/request-technical-assistance/

12. Number Format

This section is common to all of our tools.

Click on this link to navigate to [Common User Instructions: Numeric Format](#)

13. Customize Your Lists of Values

This section is common to all of our tools.

Click on this link to navigate to [Common User Instructions: Customize your List of Values](#)

14. Descriptive Flexfields (DFF's)

Event Wizard allows you to upload and download Descriptive Flexfield information.

The flexfield icon is available on the product ribbon (as per screenshot below) or when double clicking in the applicable DFF section on the sheet.
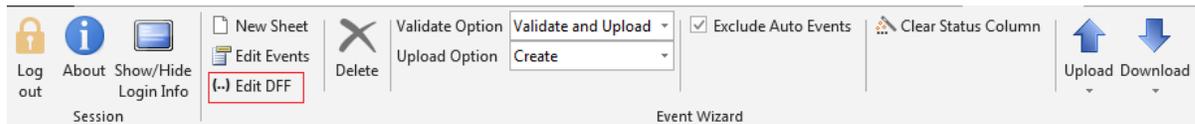
The following 'EventsDFF' form will open. Update the DFF information by using this form.
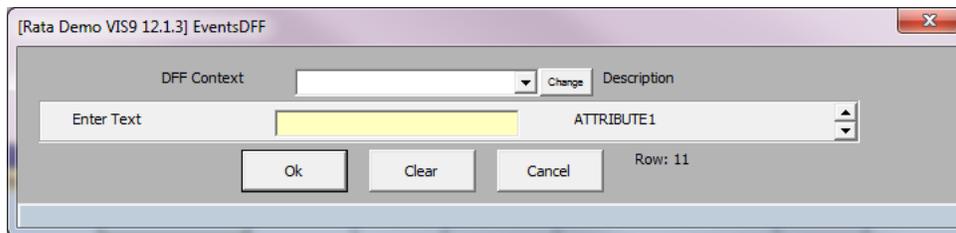
This functionality is common to all our tools.
Click on this link to navigate to Common User Instructions: Descriptive Flexfields

15. Profile Options

Profile Options are common to all of our tools. To find the profile options applicable for this Wizard, navigate to System Profile and enter **More% EW %** (Note the space before EW) as shown in the screenshot below, and select the 'Find' button.

The profile option applicable for this Wizard will show on the 'System Profile Values' form as shown below.

Many profile options can be set at the Site, Application, Responsibility or User level. Modify your search in the 'Find System Profile Options' form to set options at the appropriate level.

Profile Options are installed when you log into an instance (from the Wizard) for the first time. If a profile option is not available then you will need to re install your profile options. To do this refer to the Re Install Profile Options available in the Common User Topics documentation.

Common Profile Options

The following profile options are created for each of our products:

- *More4Apps: EW Licence Key* - This profile holds the licence key for the Wizard. If you have no license key then this field will hold 'Trial' as the licence key and some functionality will be limited. For more details on licence keys refer to the following Installation and Configuration Guide: Enter the Licence Key.

- *More4Apps: EW Load Counter* - This profile is used when the Wizard is in trial mode and counts the number of transactions completed before the Wizard logs out of your Oracle instance. This functionality will be obsolete as Wizards are upgraded.

- *More4Apps: EW Named User* **-** This profile enables you to control the named users for Project Wizard and is set at the User level in Oracle. For more details on how to set up named users refer to the following Installation and Configuration Guide: Add Named Users.

- *More4Apps: EW Minimum version* – This option allows you to enter the spreadsheet version number into this profile option. If the spreadsheet version does not match this then the wizard will not operate.

- *More4Apps: EW Banned* – If this profile option is set to 'Yes' the Wizard will not operate. This can be set at the site, responsibility or user level.

- *More4Apps: EW Automatically Assign User* – If this is set to 'Yes' Oracle will assign new users automatically up the maximum allowed by the licence key.

- *More4Apps: EW Allowed version* – This profile option is similar to 'More4Apps: EW Minimum version' but is more restrictive. It will stop any version other than the listed version from operating.

- *More4Apps: EW Latest Version Used* - This profile option is for internal use only. It records the highest version number used.

- *More4Apps: EW Limit to preset Application ID* – Set this profile to 'Yes' to limit the selection of user responsibilities to those assigned to the same application as the Wizard or set to 'No' or leave blank to display all responsibilities assigned to the user.

- *More4Apps: EW Nominated Sysadmin for user maintenance* – This profile can be set to allow a nominated person who doesn't have System Administrator profile value access to maintain users for this product. Other users that do have System Administrator profile access can still maintain product users if this profile is set to a different person.

Note – This profile option is only available for clients with Wizard versions containing 'Common Modules' version 205 and greater.

- *More4Apps: EW Unicode Encoding Option* - This profile determines if character sets used by different applications are converted. By default this is set to 'Automatic' and should not be changed unless advised by More4Apps Support.

- *More4Apps: EW Allow MS-Word autocorrect* characters - This profile can be set to prevent MS-Word AutoCorrect characters (which are non-ASCII) from being loaded – If these are loaded it can cause data corruption.

Product Specific Profile Options

The following profile options are specific to Event Wizard:

- *More4Apps: EW Validate Only* - This profile can be set to 'Yes' to allow the customer to setup validate only for the user.

16. Toolbars

There are two toolbars for Event Wizard:

- **Event Wizard - Setup** Toolbar is used to help set up the Wizard.

- **Event Wizard Toolbar** is used to carry out functions when working in your workbook.

Refer to section: Event Wizard - Setup Toolbar
Refer to section: Event Wizard Toolbar

16.1 Event Wizard - Setup Toolbar

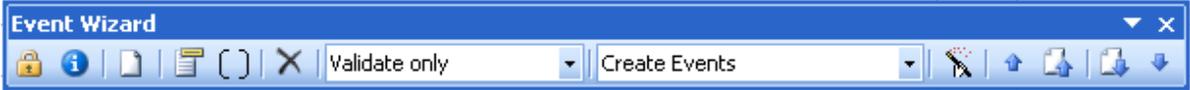The following table provides a quick reference to the Event Wizard - Setup Toolbar and its functions.

Excel 2003

Icon	Description/Functionality
Show/Hide Toolbar	Once your set-up is done you may not want your users to change the set-up so you can hide the setup toolbar. There are three options: • **Show at Start-up** – The setup menu always appears. • **Hide at Start-up** – The setup menu is hidden but can be found using: View->Toolbars -> Event Wizard - Setup. • **Hide Permanently** – The setup menu is hidden and cannot be displayed. Revert back to a copy of the original workbook to display the menu.
Login Method	Choose one of three methods for logging in: • **Standard Login** – Will use single sign-on where available. • **Alternative Login** – Will use application level sign-on. • **Standard Login (SSO Bypass)** – This will use single-sign-on Bypass. This login method is available from Oracle EBS 11.5.9 onwards and can be used if you have SSO installed but want to bypass the SSO mechanism. The user will be authenticated to the internal FND_USERS table rather than the external SSO.
Edit Template sheet	Show or Hide Template worksheet. If you modify the template worksheet, subsequent worksheets created using the 'New Sheet' button will be based on this template.

Customize Fields	The customize fields option allows you to make optional fields mandatory.
Store Password for Worksheet Protection	You can protect your worksheet after data-entry to prevent further changes. However, you must store the password in order to use the upload/validate functions. Click on this icon and store the password that you have used to protect the worksheet. For further information refer to Common User Instructions: Worksheet Protection
Customize your List of Values	This button will open a form to allow you to customize your list of values.
Record Format of Cell	Record the format of the current cell to use numeric values for the Amount/Quantity columns in the Wizard. You need to save the spreadsheet to keep the setting.
Export Login Config	Export Login Configuration Settings to New Sheet. The login configuration allows you to store links to multiple instances of Oracle Applications. Create a new blank sheet (insert worksheet) and click on this icon. The current login configuration will be copied into cell A1. This can then be copied into another workbook (into cell A1) and imported using the option below.
Import Login Config	Import Login Configuration Setting from Current Sheet. The login configuration that has been copied into cell A1 of the current sheet will be used to set up the list of instances available in this workbook.

Refer to section: Event Wizard Toolbar

16.2 Event Wizard Toolbar

The following table provides a quick reference to the Event Wizard Toolbar and its functions.

Excel 2003	
Event Wizard	

Icon	**Description/Functionality**
Log In/Out	This will either log you into or out of EBS depending on your status (terminate or reinstate your Oracle database connection). The icon will change depending on your current status. If you are currently logged in then the icon will show as 'Log Out'. If you are not logged in the icon will show as 'Log In'.
About this Program	Displays version and licencing information. You need to click on this icon to load a new licence key or modify the list of named users.
New Sheet	A new worksheet will be created based on the master template sheet. If you have not modified the master template (using the 'Show/Hide Template' icon above) all columns available will be displayed. If you have modified the master template, your new worksheets will include these changes.
Events Form	A form to enter the event information will display. If you do use this form, you can make use the 'Lists of Values' and other validation as you are entering data. Double clicking in the worksheet below row 9 will give same result.

Descriptive Flexfields 	A form will open to enable the flexfield information to be entered against the fields. You do not have to use this form, you can copy and paste or key directly into the fields if you prefer.
Delete Event indicated by cursor position 	This button will enable you to delete selected events from Oracle Projects.
Validate options 	Choose whether to 'Validate only' or 'Validate and Upload' when uploading lines into Projects. This selection is used in conjunction with the 'Upload Selected' rows icon and the 'Upload All' rows icon (below).
Upload options 	Choose whether to 'Create Events', 'Update Events' or 'Create and Update Events' when uploading lines into Projects. This selection is used in conjunction with the 'Upload Selected Rows' icon and the 'Upload all rows' icon (Below). **Note** the following when using: **Update Events** – Using 'Update Events' an Event without Currency information on the sheet, the user will receive an error 'Currency Code field must not be null when updating Events'. **Create and Update Events** – Using 'Create and Update Events' and updating an Event without Currency information on the sheet, the Event will upload successfully as there's an extra validation step in the process and it picks up the base currency in that validation step.
Clear Status Column 	This icon enables you to remove status column information from the worksheet.
Upload selected rows 	The selected rows (as indicated by the cursor) will be validated/loaded into the interface table.
Upload all Events on	All rows in the worksheet (that have not already been

Sheet	processed) will be validated/loaded into the application.
Download Data	A form will open that will enable you to download event information into the worksheet.

Refer to section: [Setup Toolbar](#)

17. Trouble Shooting

If you are having any problems using the Wizard, click on this link to search our online solutions repository http://www.more4apps.com/Support/Solutions.html

If you are unable to find a solution or have any suggestions, please contact us at http://www.more4apps.com/request-technical-assistance/

18. Licence Keys, Named Users & Installation

The instructions for product installation, setting up the list of instances, using licence keys and adding named users are in the [Installation and Configuration Guide](#).

19. Release Notes

Click on this link to navigate to the [EW Release Notes](#)
This link is also available from the Product Page on the website.

This user documentation is based on EW Release Version 5.4.20