Fluidmaster's Workshop on Basic Advanced Query, Watchlists, and Notifications

Getting Started with JD Edwards
Advanced Queries and Watchlists

Remember to complete your evaluation for this session within the app!

Session ID:

Quest2019-101810

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Agenda

- Introduction
- Adv Query & Watchlists – Defined & Advantages to Using them
- How to Access, Setup Needed
- Examples of FM Users
- How to Create a Basic AQ+WL
- Personal and Shared AQ's+WL's
- Hands On / Examples Demo
- Add'l UDOs Described
- Security and Administration (High Level)

Introduction

- Melissa Penfield - Fluidmaster
  - Director of IT, Applications Support
  - President JD Edwards So Cal User Group
- Former JD Edwards Co & Deloitte implementations consultant
- Former and Current JDE customer
  - Amgen – Biotech
  - Majestic Realty Co – Comm RE & Construction
  - Fluidmaster - International Manufacturer Plumbing Industry

Corporate Overview

- Founded in 1957
- Best Selling Toilet Fill Valve in the World
- Serving 3 Customer Sets
  - OEM Toilet Manufacturers
  - Large National Home Improvement Retail
  - Wholesalers Serving the Plumbing Industry

Global Headquarters

- San Juan Capistrano, CA USA

- Executive HQ
- Finance and IT
- Engineering, Testing R&D
- Sales

Fluidmaster Global JD Edwards E1 ERP Footprint

Phase 2-FMUK
England-Mfg
January 2014

Phase 5-FMNL/DE
Netherlands-Mfg
+German Whs
Q2 2017

Phase 6-FMTR
Turkey-Mfg
Q4 2017

Phase 3-FMC
China-Mfg
February 2014

Phase 4-FMSI/IT
Slovenia-Mfg
February 2015

Phase 1 - FMNA
North America
July 2013

HQ in SJC, Dallas DC,
Mexico Plant-FMWT

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Some of Fluidmaster's Customers

Corporate Video

https://vimeo.com/285193240

Fluidmaster IT
20 IT Personnel Supporting +>2,000 Employees

England, Netherlands, Germany, Slovenia, Turkey
2 Apps, 5 Ops

HQ-So Cal (9)
VP + 4 Apps, 4 Ops

Main Data Center

Mexico Mfg &
Dallas DC
2 IT Ops

DR D

India, China, Australia
1 Apps, 1 Ops

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Adv Query & Watchlist
Definition & Advantages of

- Extends the Grid Search (QBE) Capability with additional filtering criteria and logic (ex. In a list)

- Easier to get real time results vs PDF/static reports to utilize 'data selection' style logic, and get alerts

- No Package Builds Required, Yay!

- Options to default an inquiry view to the Query and auto-run (time saver, less clicks)

- Add a watchlist to a Query for alerting when logged into E1

- ***Watchlist requires OVR Foundation Licensing

Advanced Query

- <u>Builds on a Grid</u>
- Default Options
- Design and Save Filter Criteria (Queries)
- Share, Copy, Delete Queries
- Avail starting with 9.1 update 2
- Governed as a UDO in 9.2

OneView Watchlists

- Builds on an Query
- Creates an 'alert' within E1
- Set Warning and Critical Threshold Levels
- Set Refresh Frequency
- Can be shared
- OneView Foundation License Required
- Available starting with Tools 9.2

Watchlists ▼

My Watchlists
◌ Sold to 4242 (26)

Shared Watchlists
◌ AuditMerge (94)
◌ AuditPublish (94)
◌ **Batches in Error (3)**
◌ Fuel Shipment Confirmations (4)
◌ LKAQ (200+)
◌ **MH All Customers Shared (197)**

Example from Fluidmaster Netherlands

For example the WMS Picking Process is visible below. In our current flow the first 3 watchlists should be empty every day:
- WMS Picking Requests (0)
- WMS Picking Suggestions sts 300 (0)
- WMS Picking Suggestions sts 320 (0)

Only the watchlist with Pick Suggestions in status 340 may contain several orderliness. When something is wrong with orders in status 340 they show up on the WMS Pick Sugg 340 BACKLOG.

The same I set up for putaway and replenishment. On the purchasing and manufacturing side I did the same. These watchlists are very usefull

- WMS Badenman Ship Tomorrow (1)
- WMS CO Sales Returns (200+)
- WMS CO Status Update 570-580 (0)
- **WMS Errors 300 (24)**
- WMS Picking Requests (0)
- WMS Pick Suggestions sts 300 (0)
- WMS Pick Suggestions sts 320 (0)
- WMS Pick Suggestion sts 340 (374)
- WMS Pick Sugg 340 BACKLOG (0)
- WMS Putaway Requests (0)
- WMS Putaway Sugg sts 300 (0)
- WMS Putaway Sugg sts 340 (0)
- WMS Replenishment Requests (0)
- WMS Replenishment Sugg sts 340 (0)
- WMS Stock on Primary Location (0)
- WMS Whirlpools ready to ship (2)

- OP Order Entry Today -1 (8)
- WLNS Open Orders (21)
- **WLNS Backlog (2)**
- **WLNS status 15 (1)**
- **WO Backlog (34)**

Shared
- 4311_Stock on loc EX (4)
- OO status 280 NOT printed (0)
- **PO Late Supply NLA NLP (13)**
- PO Late Supply NLW (0)
- PO Receipts Arnhem (200+)
- PO Receipts Nijmegen (200+)
- PO Receipts Wellness (69)
- **PO status 280 NOT printed (35)**
- PO status 300 NOT confirmed (200+)
- QC to be approved Arnhem (2)
- QC to be approved Nijmegen (1)

Fluidmaster currently utilizes +3,000 Adv Queries and +300 Watchlists!

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Create a Basic Advanced Query & Watchlist
(In Customer Environment)

- Access Fluidmaster PY Environment
- Demo

Other Things You Can Do

Watchlist in Pages

- Visual indicator "badge" with count of items requiring action

Personal Vs Shared Adv Query

- Picture / Example of how you can tell.

Security and Administration (High Level)

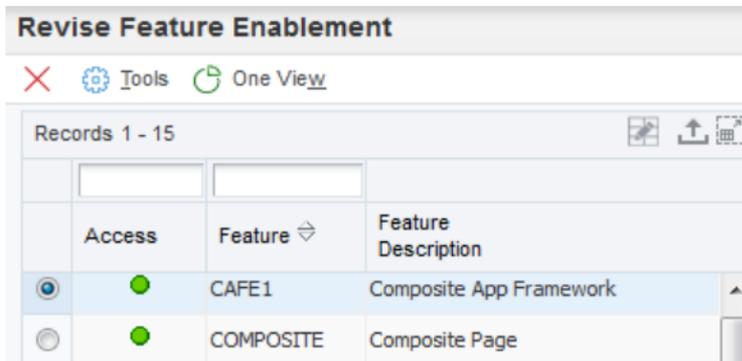- **E1: SEC: Setting up View, Manage, and Action Security for the User Defined Objects (UDO) available with 9.2 and newer (Doc ID 2072336.1)**

UDO Feature Security

Feature security allows for turning on or off the UDO feature. It is either enabled for the entire install or disabled from the feature level. For details on security on a specific user for a feature, see the UDO security sections below.

Steps:

1. Sign on to the web client and fastpath to P00950 (Security Workbench).
2. Select the Form menu exit
3. Feature Security
4. Green icon indicates active / Red icon not active
   - When making changes to the security, need to clear the jdbj security cache in Server Manager

> Note: Make sure you have signed on to the web client to perform these steps. If you sign on to the fat client, Feature Security form exit is disabled.
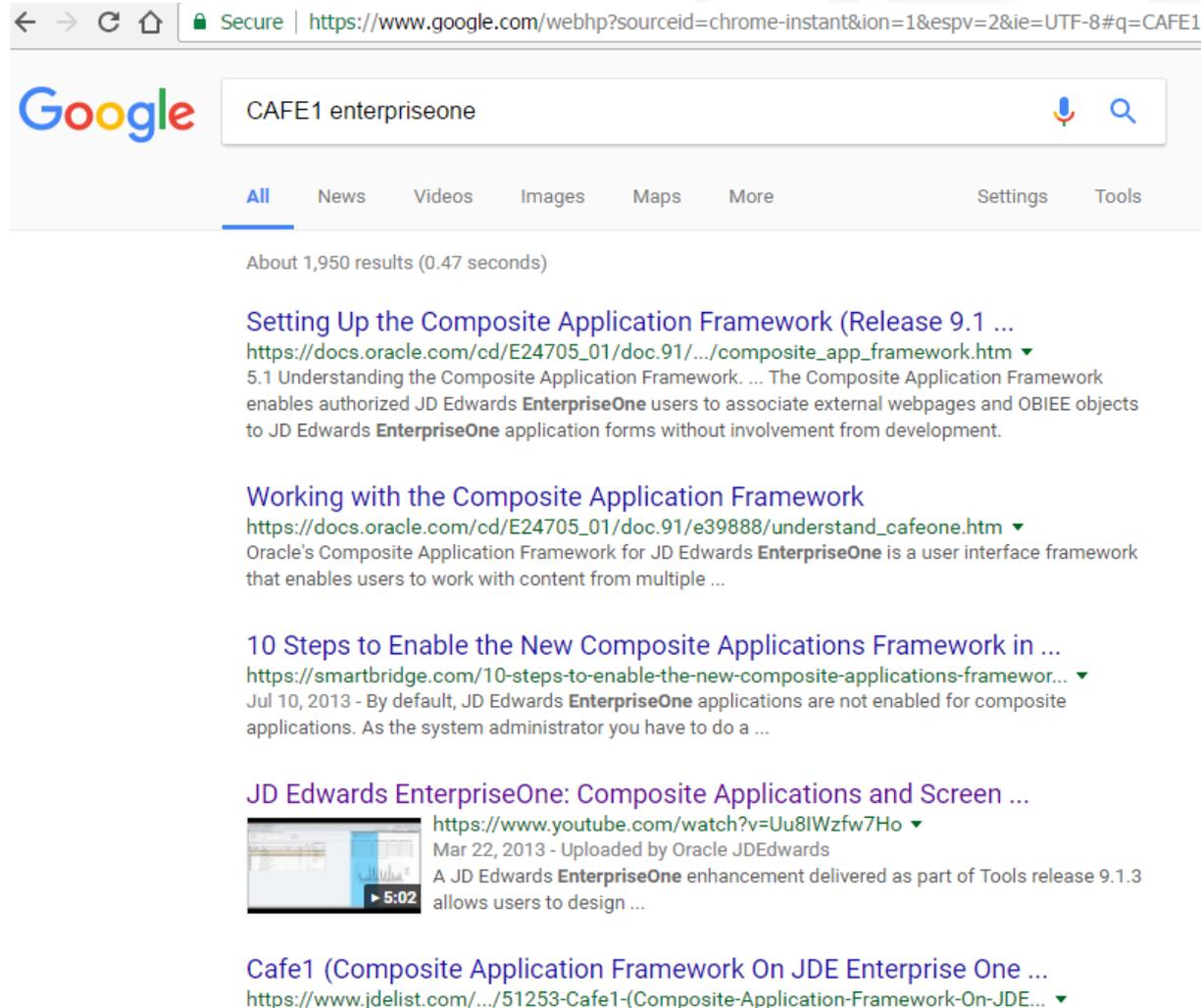
Revise Feature Enablement

✕ ⚙ Tools ⟳ One View

Records 1 - 15

	Access	Feature ⇧	Feature Description	
⦿	🟢	CAFE1	Composite App Framework	▲
○	🟢	COMPOSITE	Composite Page	

Resources:

- Google Search for Documentation/Articles
- Oracle docs, no login required
- YouTube

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