



COLLABORATE19

TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

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

Prepared by:

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President

Platinum 21

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April 11, 2019 8:00-9:00 am

#C19TX

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



★ HEADQUARTERS

◆ MANUFACTURING

● MAJOR DISTRIBUTION

Some of Fluidmaster's Customers



Corporate Video



<https://vimeo.com/285193240>

Fluidmaster IT

20 IT Personnel Supporting +>2,000 Employees



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

- Builds on a Grid
- 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

Order Number * * * * * Branch/Plant 4311

Customer PO * * * * *

Item Number * * * * *

Sold To * * * * * Extend Back Order Quantity

Ship To * * * * * Customer Item

Records 1 - 18

Order Number	Or Ty	Order Co	Line Number	Rev Nbr	Revision Reason	Hd Cd	Sold To	Sold To Name	Description 1
1000	SO	00431	1,000	3			415663	Asto Keukens B.V.	hefboom hele spoelling xt
1000	SO	00433	1,000	0			415663	Asto Keukens B.V.	samenstelling bok xt
1004	SA	00431	1,000	0			415663	Asto Keukens B.V.	hefboom hele spoelling xt
1004	SA	00431	2,000	0			415663	Asto Keukens B.V.	Freight NL
1005	SO	00431	1,000	0			415663	Asto Keukens B.V.	hefboom hele spoelling xt
1009	SO	00431	1,000	0			411443	2EMMECERAMICHE SRL CR	Enjoy Super Plus 4
1010	SO	00431	1,000	0			411443	2EMMECERAMICHE SRL CR	Enjoy Super Plus 4
1011	SO	00431	1,000	0			411443	2EMMECERAMICHE SRL CR	Enjoy Super Plus 4

Query Manager

Name (Create)

Set As Default

Run When Selected

Clear Form When Selected

Conditions:

Match All Match Any

Order Number (QBE) =

Or Ty (QBE) equal

Order Co (QBE) equal

Sold To (QBE) =

+ Additional Fields Selection

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

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 useful

- 🔄 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!

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

The screenshot displays the Oracle JD Edwards EnterpriseOne user interface. At the top, the header includes the Oracle logo, the text "JD Edwards EnterpriseOne", and user information: "Roles", "Personalization", "Help", "MHUSERB", "[JDVS LOVIN]", and "Sign Out". Below the header is a navigation bar with "Home", "Navigator", "Open Applications", "Recent Reports", "Favorites", "Watchlists", and "Fast Path". The main content area is titled "Financial Planning Forecasting and Budgeting" and "Watchlists on E1 Page". It features a workflow diagram with several steps, each with a watchlist badge indicating the number of items requiring action:

- Employee List (200)
- Out for Service (16)
- Items on Backorder (153)
- Generate Forecast Results
- Apply Forecast to Budget
- Vouchers Pending Payment (5)
- Approved Budget
- Final Budget
- Budget vs. Actual Reporting

The bottom of the interface shows a navigation bar with "Open Applications", "Recent Reports", "Favorites", and a "Home" button with a house icon.

Personal Vs Shared Adv Query

- Picture / Example of how you can tell.

▼ Favorites

Customer Service Inquiry - Customer Service Inquiry Personal Form: (No Personalization) Layout: Cust Serv Inq - FEDEX Track Query: All Records

✓ 🔍 + 📄 ✕ ⚙️ Eorm ⋮ Row ⚙️ Tools 🔄 One View

Customer Service Inquiry Additional Selections

Order Number * [] * [] * [] Branch/Plant * []

Customer PO * []

Item Number * []

Sold To * [] Extend Back Order Quantity

Ship To * [] Customer Item

No records found.

	Branch/Plant	Location	Order Number	Or Ty	Order Co	Line Number	Rev Nbr	Revision Reason	Hd Cd	Sold To	Sold To Name	Ship To	Ship To
--	--------------	----------	--------------	-------	----------	-------------	---------	-----------------	-------	---------	--------------	---------	---------

Most Recent Order First
Show All Columns
Personal
Most Recent Order First
Status

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)**

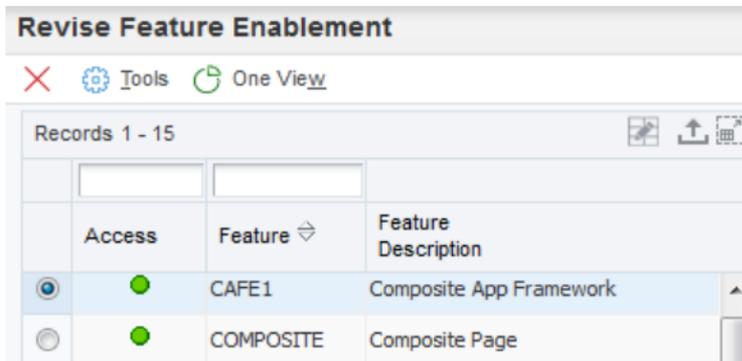
UDO Feature Security

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.

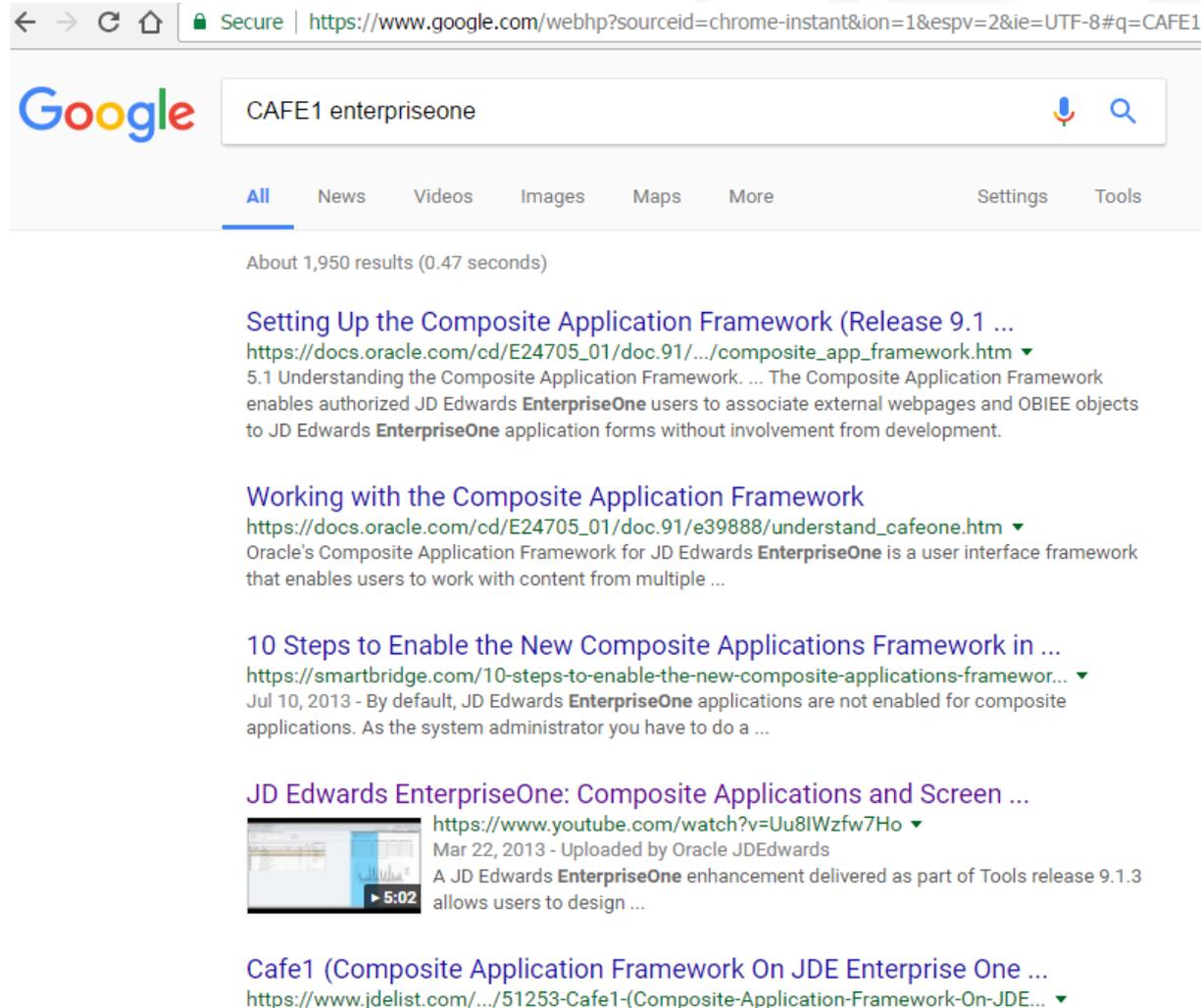


The screenshot shows the 'Revise Feature Enablement' web interface. At the top, there is a title bar with a close button (X), a gear icon for 'Tools', and a refresh icon for 'One View'. Below the title bar, there is a table with the following columns: 'Access', 'Feature', and 'Feature Description'. The table contains two rows of data:

Access	Feature	Feature Description
<input checked="" type="radio"/>	CAFE1	Composite App Framework
<input type="radio"/>	COMPOSITE	Composite Page

Resources:

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



The screenshot shows a Google search results page for the query "CAFE1 enterpriseone". The search bar at the top contains the text "CAFE1 enterpriseone". Below the search bar, there are navigation tabs for "All", "News", "Videos", "Images", "Maps", and "More". The "All" tab is selected. The search results show "About 1,950 results (0.47 seconds)". The first result is titled "Setting Up the Composite Application Framework (Release 9.1 ...)" with a URL starting with "https://docs.oracle.com/cd/E24705_01/doc.91/.../composite_app_framework.htm". The second result is titled "Working with the Composite Application Framework" with a URL starting with "https://docs.oracle.com/cd/E24705_01/doc.91/e39888/understand_cafeone.htm". The third result is titled "10 Steps to Enable the New Composite Applications Framework in ..." with a URL starting with "https://smartbridge.com/10-steps-to-enable-the-new-composite-applications-framework...". The fourth result is titled "JD Edwards EnterpriseOne: Composite Applications and Screen ..." and includes a video thumbnail with a duration of 5:02. The fifth result is titled "Cafe1 (Composite Application Framework On JDE Enterprise One ...)" with a URL starting with "https://www.jdelist.com/.../51253-Cafe1-(Composite-Application-Framework-On-JDE...".



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