SUMMER school

JD Edwards EnterpriseOne
Training

User Experience

steltix

JD Edwards EnterpriseOne
Exercise: Add a watchlist for due deliveries

1 Overview

Since Tools Release 9.1.3 you can create watchlists for every EnterpriseOne Screen with a grid. They could be used as activity lists to display what different users have to do and lead into "Management by Exception". You can also embed your watchlist into your EnterpriseOne Composed Page.
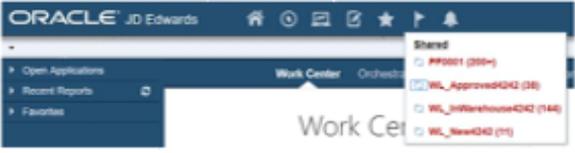
2 Exercise

1. Go to: demo.steltix.com

2. Sign on with Sign on with User and Password DEMO and navigate by fast path "P4210" to the Sales Order Entry program.
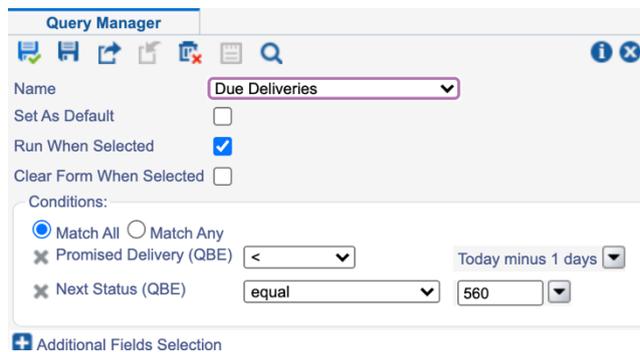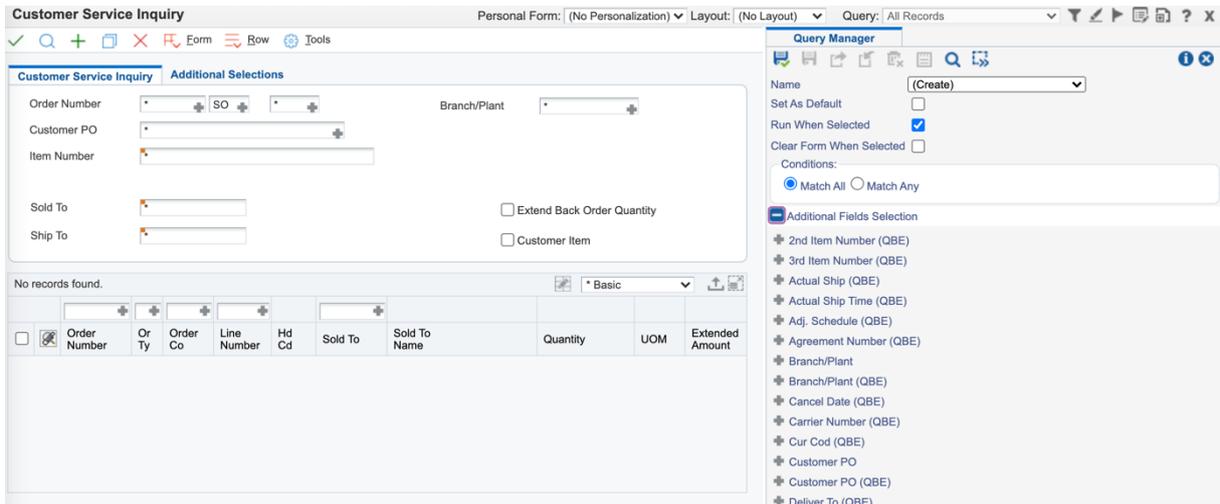
3. Create a query first. Click on ▼ symbol.
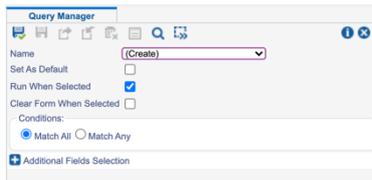
 The Query Manager opens.

4.   Click on Additional Fields Selection. You can now either select fields directly from the form or from the list.

 5.   The Promised Delivery Date should be less than yesterday.
Add the field "Promised Delivery" and select with the dropdown "Today minus 1 days" and "Next Status" = 560.

6. Click on Save and enter a new name. Close the Query Manager.

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Watchlists are based on queries and with thresholds you are able to design a traffic light for your activities. Good examples are backorders to release, planning messages to be processed, overdue receipts or deliveries, etc. Everything you like to have under control.

7. Create a watchlist based on this Query by clicking on the ▶ Symbol.
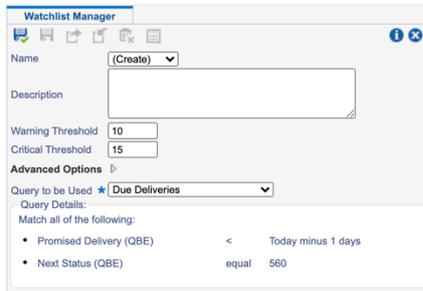
8.   Enter the warning and the critical threshold.
There are two Thresholds available:
Warning Threshold – enter number of records, will be shown in yellow colour
Critical Threshold – enter number of records, will be shown in red colour

9. Select the query to be used for this watchlist and save your watchlist.

10. On your EnterpriseOne Screen you can find watchlists on the top of the screen. The number in brackets is the number of records the query counted. The display colour is based on your defined Threshold.

11. By clicking on your watchlist the program will be opened and all records for the query are automatically displayed.

DONE. Feel free to add additional queries and watchlists.

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