

# **JD Edwards EnterpriseOne Applications**

One View Watchlists Implementation Guide

Release 9.1

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# Preface

Welcome to the *JD Edwards EnterpriseOne Applications One View Watchlists Implementation Guide*.

## Audience

This document is intended for end users for whom the One View Watchlist feature has been enabled, or administrators and users who are authorized to make One View Watchlists available to a group of users.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

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## Related Documents

You can access related documents from the JD Edwards EnterpriseOne Release Documentation Overview pages on My Oracle Support. Access the main documentation overview page by searching for the document ID, which is 1308615.1, or by using this link:

<https://support.oracle.com/CSP/main/article?cmd=show&type=NOT&id=1308615.1>

To navigate to this page from the My Oracle Support home page, click the Knowledge tab, and then click the Tools and Training menu, JD Edwards EnterpriseOne, Welcome Center, Release Information Overview.

## Conventions

This document uses the following text conventions:

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Convention	Meaning
<b>Bold</b>	Indicates field values.

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<b>Convention</b>	<b>Meaning</b>
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.
	Indicates a link to a recording of the described feature. These recordings are in MP4 format so ensure that you have an appropriate player installed. Access to these recordings requires a valid Oracle account.

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# Understanding One View Watchlists

This chapter contains the following topics:

- [One View Watchlists Overview](#)
- [Key Features of One View Watchlists](#)
- [Shared and Personal Watchlists](#)
- [Viewing One View Watchlists](#)

## 1.1 One View Watchlists Overview

One View Watchlists represent collections of items that match user-defined criteria. They enable users to define information to which they would like to be alerted. For example, a user might want to be alerted to outstanding tasks that they need to do or thresholds that have been passed. Watchlists provide an easy way for this information to be conveyed to users.

If there are existing Watchlists to which you have access, you will see the Watchlists menu on the menu bar within JD Edwards EnterpriseOne. When you select the Watchlist menu, a list of existing Watchlists appears. Each Watchlist represents a collection of items that match the criteria that were set up for that Watchlist. For example, Watchlists might contain expenses needing approval, batch processes in error, customers over their credit limit, and purchase order receipts past due.

Watchlists are built upon the existing JD Edwards EnterpriseOne query framework and are therefore, only supported on forms that support queries.

## 1.2 Key Features of One View Watchlists

One View Watchlists:

- Improve user productivity by pushing data to the end user outside of the application.
- Enable users to define personalized Watchlists based on a JD Edwards EnterpriseOne application and saved query.
- Enable users to quickly access information that is important to them directly from their JD Edwards EnterpriseOne home page.
- Provide advanced options like warning thresholds, refresh intervals, and maximum record counts.
- Enable an administrator to secure which users can view, create, and share Watchlists.

## 1.3 Shared and Personal Watchlists

One View Watchlists are classified as either shared or personal. Shared Watchlists are available systemwide unless they are restricted by security settings. Watchlists that you create are classified as personal Watchlists and appear under My Watchlists on the Watchlists menu. Personal Watchlists are available only to you. However, you may have the option to publish a personal Watchlist to share it. This option is not necessarily available to every user because permission to share a Watchlist must be granted by an administrator.

When you publish a Watchlist, the personal copy of the Watchlist is maintained and is completely separate from the shared Watchlist. The two Watchlists both appear on the Watchlists menu, one under the My Watchlists section and one under the Shared Watchlists section.

## 1.4 Viewing One View Watchlists

Once Watchlists have been created and if you have been permitted access, you will see the Watchlists menu on the JD Edwards EnterpriseOne menu bar. Within the Watchlist menu, you find Watchlists that you have created under the “My Watchlists” heading. Shared Watchlists to which you have access appear under the “Shared Watchlists” heading.

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**Note:** Security options are available to prevent users from viewing or creating Watchlists. If Watchlist security has been implemented, you may not see some or all shared Watchlists or be able to create your own Watchlists.

See the JD Edwards EnterpriseOne Tools One View Administration Guide for more information.

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The first time you open the Watchlists menu, the system will update the Watchlists with the most current information. The frequency of updates after that is determined by how the Watchlist was defined. However, you can use the Refresh icon in front of the Watchlist name to recompute the Watchlist information on demand. You can also hover over a Watchlist to see how long it has been since its last update.

When a Watchlist is defined, a warning threshold and a critical threshold can also be specified for that Watchlist. If a particular Watchlist has surpassed the warning threshold, it appears in bold text within the Watchlists menu. If a Watchlist has surpassed its critical threshold, it appears in red text.

The number in parenthesis immediately following the name of the Watchlist represents a count of records that meet the query criteria. The number shown in parentheses will never exceed the Maximum Records to Return field defined when the Watchlist was created. It will display the maximum records to return with a plus sign. For example, if there are 63 records representing fuel shipment confirmations and the maximum records to return is set to “50,” the Watchlist displays as: Fuel Shipment Confirmations (50+). It may also be bold and red depending on the warning and critical thresholds that have been set up for the Watchlist.

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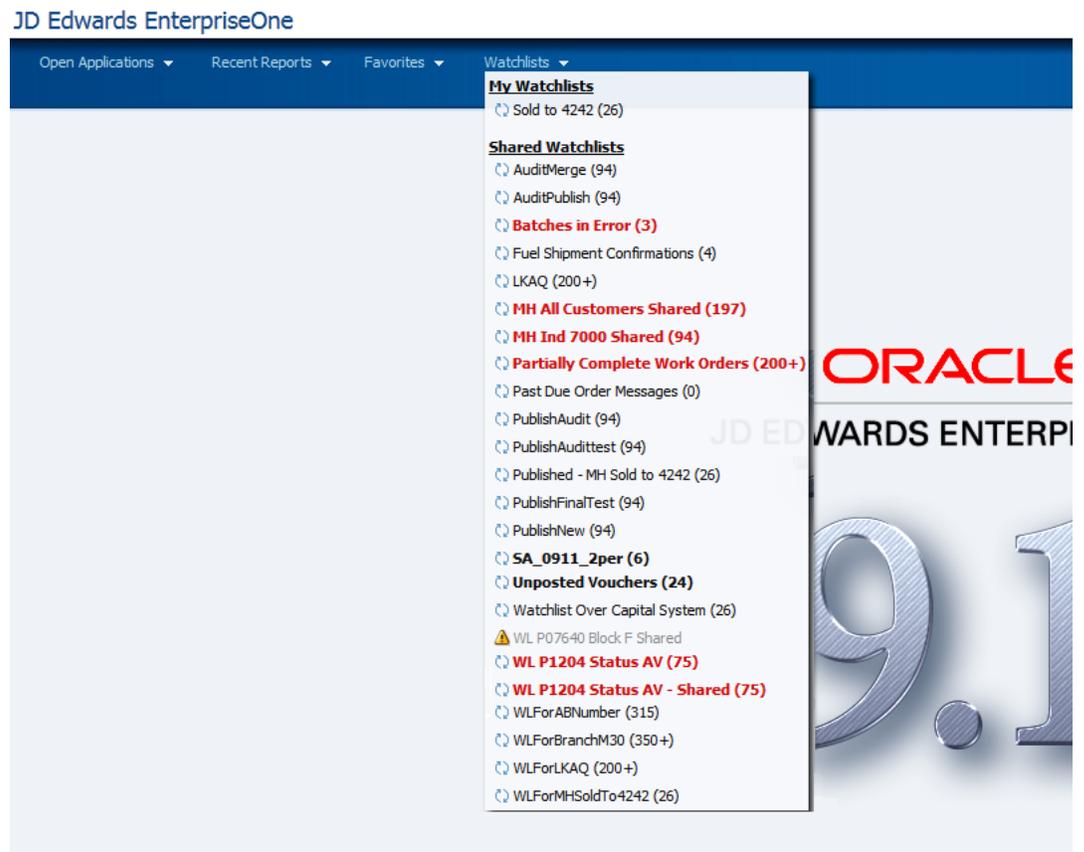
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**Note:** The critical threshold should be higher than the warning threshold and lower than the maximum records to return in order to be useful.

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Figure 1–1 Watchlists Menu



Selecting a Watchlist takes you into the application where you can see the items included in the query. Within each application, use the Watchlist Design icon to access the Watchlist Management tab and add, edit, share, or delete Watchlists.



**Tutorial:** [Click here to view a recording of this feature.](#)



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## Creating One View Watchlists

This chapter contains the following topics:

- [Introduction to Creating One View Watchlists](#)
- [Adding a New One View Watchlist](#)
- [Sharing a One View Watchlist](#)

### 2.1 Introduction to Creating One View Watchlists

Watchlists represent a collection of items that match criteria that you or another user or administrator has set up. You create Watchlists for information and tasks that you want to track easily. These Watchlists appear on the JD Edwards EnterpriseOne menu bar so that you do not need to go into individual applications to look for pertinent data. Watchlists are useful for tracking information such as batches in error, purchase orders needing your approval, customers exceeding their credit limit, and more. Anything important to your organization and your job responsibilities can become a query and then a Watchlist.

Watchlists are created from within an application. Every Watchlist is based on an existing query. If an appropriate query does not already exist, you must add the query first. See the JD Edwards EnterpriseOne Tools Foundation Guide for more information on creating and managing queries.

### 2.2 Adding a New One View Watchlist

This section lists prerequisites and discusses how to add a new Watchlist.

#### 2.2.1 Prerequisites

Before you complete the tasks in this section:

- Verify that security is set up to allow you to create Watchlists.  
See the *JD Edwards EnterpriseOne Tools One View Administration Guide* for more information on Watchlist security.
- Set up a query to gather the data for which you want to create the Watchlist or use an existing query to which you have access.

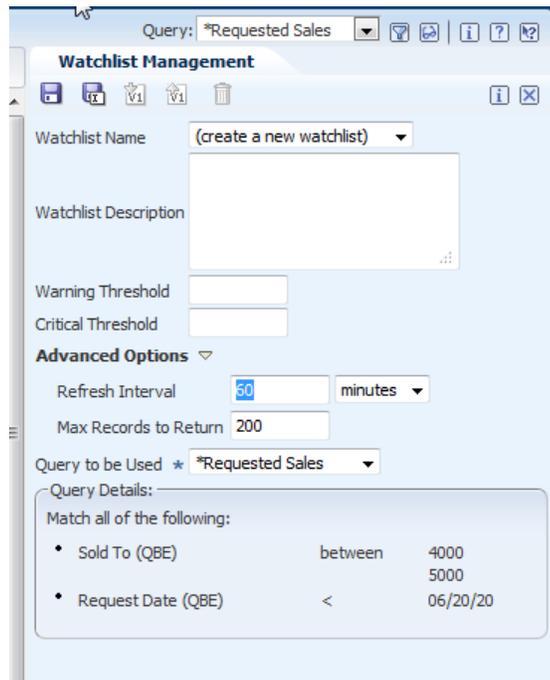
See the *JD Edwards EnterpriseOne Tools Foundation Guide* for more information on queries.

## 2.2.2 Adding a One View Watchlist

To add a One View Watchlist:

1. Access the application/form/version that contains the query from which you want to create the Watchlist.
2. Select the Add/Edit Watchlists icon and the Watchlist Management tab opens.

**Figure 2–1 Watchlist Management Tab**



3. On the Watchlist Management tab, enter the following information:

Field	Value
Watchlist Name	Leave the default value of “(create a new watchlist).”
Watchlist Description	Optional. Enter a description for your Watchlist.
Warning Threshold	Optional. Specify the number of records at which the Watchlist appears in a bold font.
Critical Threshold	Optional. Specify the number of records at which the Watchlist appears in red font.
Refresh Interval	Optional. This field is found in the Advanced Options collapsible section. Specify how often in hours or minutes that you want to run the query and refresh the Watchlist data.
Max Records to Return	Optional. This field is found in the Advanced Options collapsible section. Specify the maximum number of records to return. This field is used for performance considerations.
Query to be Used	Required. Select the query from the drop-down list to use for this Watchlist. Selection criteria for the selected query appear in the Query Details box below this field.

4. Select the Save Watchlist icon.
5. Enter the new Watchlist name in the pop-up window.
6. Click OK.

## 2.3 Sharing a One View Watchlist

After you create a Watchlist, you can share the Watchlist with other users. In order to be able to share a Watchlist, you must have the appropriate permissions.

For more information on setting up security on web object actions, such as sharing Watchlists, see the *JD Edwards EnterpriseOne Tools One View Administration Guide*.

When you share a Watchlist, you create a new unrelated copy of the existing Watchlist. The new Watchlist appears in the Shared Watchlists section of the Watchlist menu. The original Watchlist still appears in the My Watchlists section of the Watchlist menu. Each Watchlist can be edited or deleted individually without affecting the other. There is no relationship or link between the two Watchlists.

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**Caution:** You cannot share a Watchlist that is based on a personal query. You will receive an error. In order to make a shared copy of a Watchlist, the query upon which it is based must also be shared.

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To share a Watchlist:

1. On the Watchlist Management tab, in the Watchlist Name field, select the Watchlist from the drop-down list. The selected Watchlist must have been based on a previously shared query when it was created.
2. Click the Publish Watchlist icon.
3. Enter the new Watchlist name in the pop-up window.
4. Click OK.
5. When the following message appears: "You are making a sharable copy of this Watchlist that other users may be able to view. Continue?", click OK.
6. Based on security settings, you may or may not be able to see the shared copy of the Watchlist that you just created. If you have permissions, you can open the Watchlist menu to verify that the new Watchlist appears under the Shared Watchlists heading. It also still appears under the My Watchlists heading. This is because when you share a Watchlist, you make a new completely separate copy of the Watchlist.

Since the security configuration for Watchlists is cached, you must sign out and back in to see the newly shared Watchlist. Again, whether it appears depends on your security settings.



**Tutorial:** [Click here to view a recording of this feature.](#)



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## Modifying One View Watchlists

This chapter contains the following topics:

- [Modifying Watchlists](#)
- [Deleting Watchlists](#)

### 3.1 Modifying Watchlists

This section discusses how to:

- Modify a personal Watchlist.
- Modify a shared Watchlist.

#### 3.1.1 Modifying a Personal Watchlist

To modify a personal Watchlist:

1. Select the Watchlist that you want to modify from the Watchlists menu. The application for which the Watchlist was created opens.
2. Select the Watchlist Design icon to access the Watchlist Management tab.
3. In the Watchlist Name field, use the drop-down menu to find and select your personal Watchlist.
4. Make your desired changes to the Watchlist and select the Save Watchlist icon. You can also select the Save Watchlist As icon to create a new Watchlist from this one.

#### 3.1.2 Modifying a Shared Watchlist

To modify a shared Watchlist:

1. Select the Watchlist that you want to modify from the Watchlists menu. The application for which the Watchlist was created opens.
2. Select the Watchlist Design icon to access the Watchlist Management tab.
3. In the Watchlist Name field, use the drop-down menu to find and select the shared Watchlist.
4. Select the Reserve Watchlist icon. You must reserve the shared Watchlist before you can edit it.

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**Note:** When someone reserves a Watchlist, “(Reserved by *user id*)” displays above the Watchlist name. Only one user can reserve the Watchlist at a time. When you reserve a Watchlist, it appears in your Watchlists menu under the heading Reserved Watchlists. This serves as a reminder that you currently have a Watchlist reserved.

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5. Make your desired changes to the Watchlist and then select the Save Watchlist icon.

If you decide that you do not want to make changes to the Watchlist, select the Release Reservation icon to release the Watchlist without making any changes.

6. Finally, select the Re-Publish Watchlist icon to republish the Watchlist with your changes.
7. A pop-up window stating, “You are updating the shared copy of this Watchlist that other users may be using. Continue?” appears. Click OK.

The system releases your reservation, re-publishes the updated shared Watchlist, and removes the Watchlist from the Reserved Watchlists section of the Watchlists menu.

## 3.2 Deleting Watchlists

This section discusses how to:

- Delete a personal Watchlist.
- Delete a shared Watchlist.

### 3.2.1 Deleting a Personal Watchlist

To delete a personal Watchlist:

1. Select the Watchlist that you want to delete from the Watchlists menu.
2. Within the application, select the Watchlist Design icon.
3. Use the drop-down menu to enter your Watchlist in the Watchlist Name field.
4. Select the Delete Watchlist icon.
5. Click OK on the “Are you sure you want to delete this Watchlist?” pop-up window.

### 3.2.2 Deleting a Shared Watchlist

To delete a shared Watchlist:

1. Select the Watchlist that you want to delete from the Watchlists menu.
2. Within the application, select the Watchlist Design icon.
3. Use the drop-down menu to select and enter the Watchlist in the Watchlist Name field.
4. Select the Reserve Watchlist icon. You must reserve the shared Watchlist before you can delete it.

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**Note:** When someone reserves a Watchlist, “(Reserved by *user id*)” displays above the Watchlist name. Only one user can reserve the Watchlist at a time.

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5. To delete the shared Watchlist, select the Delete Watchlist icon.
6. Click OK on the “NOTE: This action will delete the shared copy of this Watchlist. Are you sure you want to delete this Watchlist?” pop-up window.

The system deletes the shared Watchlist and removes it from both the Shared Watchlists and the Reserved Watchlists sections of the Watchlists menu.

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**Note:** If you delete all of the Watchlists that you have permissions to view, you will no longer see the Watchlists drop-down menu.

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