

# **JD Edwards EnterpriseOne Applications**

One View Watchlists Implementation Guide

Release 9.2

**E63996-03**

April 2017

Describes One View Watchlists and discusses how to add and modify One View Watchlists.

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# Contents

<b>Preface</b> .....	v
Audience.....	v
Documentation Accessibility .....	v
Related Information.....	v
Conventions.....	v
<b>1 Understanding One View Watchlists</b>	
1.1 One View Watchlists Overview .....	1-1
1.2 Key Features of One View Watchlists.....	1-1
1.3 Shared and Personal Watchlists .....	1-2
1.4 Viewing One View Watchlists .....	1-2
<b>2 Creating One View Watchlists</b>	
2.1 Introduction to Creating One View Watchlists.....	2-1
2.2 Prerequisites.....	2-1
2.3 Adding a One View Watchlist .....	2-1
2.4 Requesting to Publish a One View Watchlist.....	2-3
<b>3 Modifying One View Watchlists</b>	
3.1 Modifying Watchlists .....	3-1
3.1.1 Modifying a Personal Watchlist .....	3-1
3.1.2 Modifying a Shared Watchlist .....	3-1
3.2 Deleting Watchlists.....	3-2
<b>4 Using the EnterpriseOne Watchlists Mobile Application (Tools Release 9.2.1.2)</b>	
4.1 Prerequisites.....	4-1
4.2 Viewing One View Watchlists on a Mobile Device.....	4-1



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# Preface

Welcome to the *JD Edwards EnterpriseOne Applications One View Watchlists Implementation Guide*. This guide has been updated for JD Edwards EnterpriseOne Tools release 9.2.1.2.

## 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

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## Related Information

For additional information about JD Edwards EnterpriseOne applications, features, content, and training, visit the JD Edwards EnterpriseOne pages on the JD Edwards Resource Library located at:

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## Conventions

This document uses the following text conventions:

Convention	Meaning
<b>boldface</b>	Boldface type indicates graphical user interface elements associated with an action, or items defined in text or the glossary.
<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.

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<b>Convention</b>	<b>Meaning</b>
> <b>Tutorial</b>	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:

- [Section 1.1, "One View Watchlists Overview"](#)
- [Section 1.2, "Key Features of One View Watchlists"](#)
- [Section 1.3, "Shared and Personal Watchlists"](#)
- [Section 1.4, "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. You can create Watchlists for data in the data tables using the Data Browser (Release 9.2 Update).

## 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 such as 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 system-wide unless they are restricted by security settings. Watchlists that you create are classified as personal Watchlists and appear under Personal 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.

## 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 "Personal" heading. Shared Watchlists to which you have access appear under the "Shared" heading. You can also see Watchlists that are pending approval, in rework, or reserved by a user for editing.

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**Note:** Security options are available to prevent users from viewing, creating, sharing, or modifying 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 Security 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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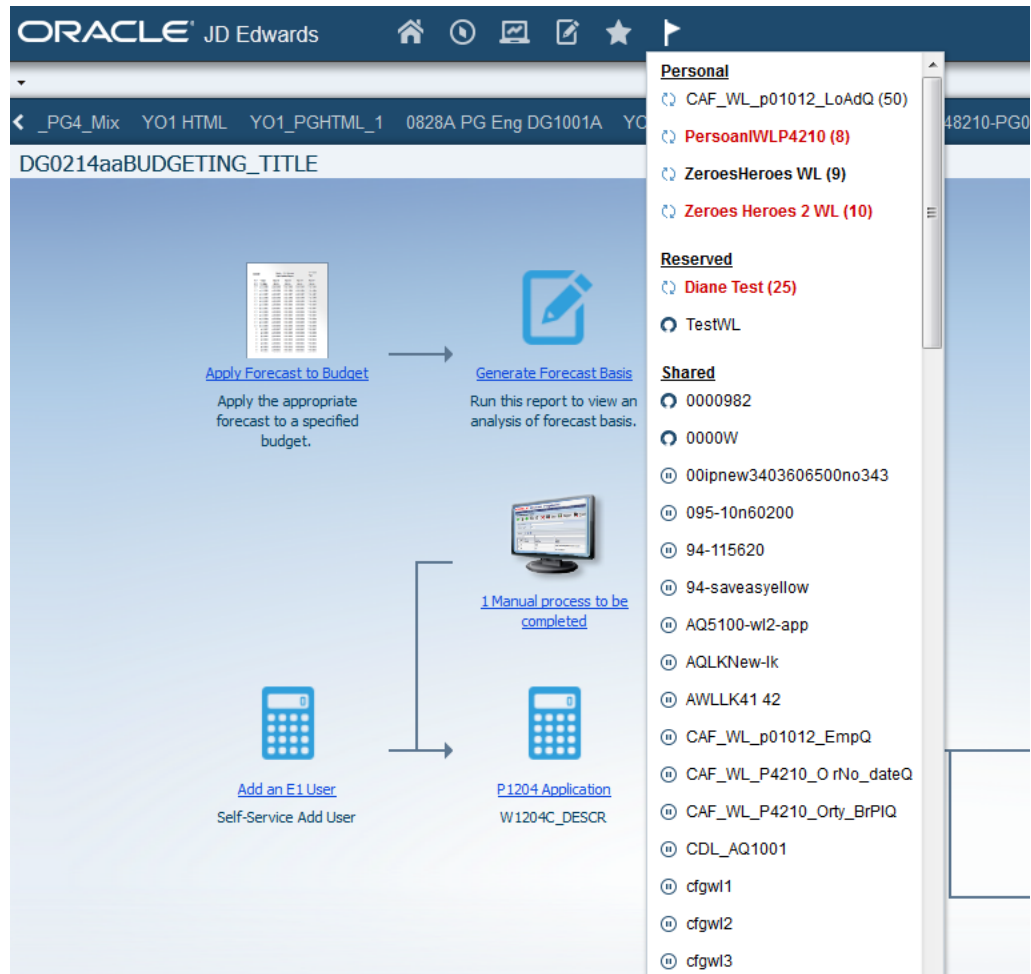
**Note:** The critical threshold should be higher than the warning threshold and lower than the maximum records to return in order to be useful.

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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 Manage One View Watchlists icon to access the Watchlist Management tab and add, edit, share, or delete Watchlists.

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**Note:** When you create a Watchlist item in the Data Browser, the Data Browser cannot be launched from the Watchlist drop-down menu, EnterpriseOne pages or Composed EnterpriseOne pages. (Release 9.2 Update)

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

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## Creating One View Watchlists

This chapter contains the following topics:

- [Section 2.1, "Introduction to Creating One View Watchlists"](#)
- [Section 2.2, "Prerequisites"](#)
- [Section 2.3, "Adding a One View Watchlist"](#)
- [Section 2.4, "Requesting to Publish 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 Using and Approving User Defined Objects Guide* for more information on creating and managing queries.

### 2.2 Prerequisites

Before you complete the tasks in this chapter:

- Verify that security is set up to allow you to create Watchlists.

See the *JD Edwards EnterpriseOne Tools Security 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.

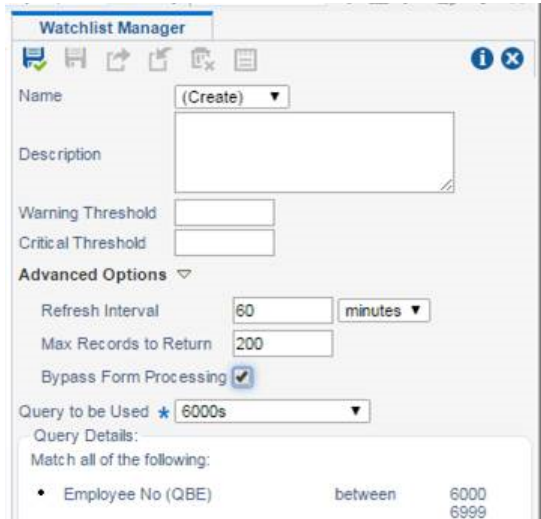
See the *JD Edwards EnterpriseOne Tools Using and Approving User Defined Objects Guide* for more information on queries.

### 2.3 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 **Manage One View Watchlists** icon and the Watchlist Manager panel opens:

**Figure 2–1 Watchlist Manager Panel**



3. Complete the following fields:
  - ⌘ Name  
Leave the default value of "(Create)" in this field. You will enter a name when you save the Watchlist.
  - ⌘ (Optional) Description
  - ⌘ (Optional) Warning Threshold  
Specify the number of records at which the Watchlist appears in bold font.
  - ⌘ (Optional) Critical Threshold  
Specify the number of records at which the Watchlist appears in red font.
4. (Optional) Open the Advanced Options section and complete these fields:
  - ⌘ Refresh Interval
  - ⌘ Max Records to Return  
You can specify a maximum number of records in order to improve performance when returning results.
  - ⌘ Bypass Form Processing (Tools Release 9.2.1.2)  
Select this option to process data for a Watchlist count directly from the database, likely decreasing the time it takes to return results. However, be aware that when this option is selected, the system does not perform application processing that may affect the number of rows returned, so the number of rows may be different when using this option.
5. Complete the **Query to be Used** field by selecting the query that you want to use for the Watchlist from the drop-down menu.  
Selection criteria for the selected query appear in the **Query Details** box below this field.
6. Select the **Save** icon.

7. Enter the new Watchlist name in the pop-up window.
8. Click **OK**.

## 2.4 Requesting to Publish 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 Security Administration Guide*.

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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 request to publish a Watchlist:

1. On the Watchlist Manager tab, in the 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 **Request to Publish** icon.
3. You can open the Watchlist menu to verify that the new Watchlist appears under the Pending Approval heading. It no longer appears under the Personal heading.

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.

4. After the Watchlist is approved, it appears in the Shared section of the Watchlists menu. If it is rejected, it appears in the Rework section of the Watchlists menu.

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

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## Modifying One View Watchlists

This chapter contains the following topics:

- [Section 3.1, "Modifying Watchlists"](#)
- [Section 3.2, "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 **Manage One View Watchlists** icon to access the Watchlist Manager tab.
3. In the 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** 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 **Manage One View Watchlists** icon to access the Watchlist Manager tab.
3. In the Name field, use the drop-down menu to find and select the shared Watchlist.
4. Select the **Reserve** 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. 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** icon.  
If you decide that you do not want to make changes to the Watchlist, select the **Unreserve** icon to release the Watchlist without making any changes.
6. Finally, select the **Request to Publish** icon to request to publish the Watchlist with your changes.
7. A pop-up window stating, "You have requested to publish this. Do you want to continue?" appears. Click **OK**. You may also click the check box and include comments about your Watchlist.

The updated Watchlist is sent for approval. Once the Watchlist is approved, the system removes the Watchlist from the Reserved section of the Watchlists menu and releases your reservation. menu.

If your changes are rejected, the Watchlist appears in the Rework section of the Watchlists menu.

Since the security configuration for Watchlists is cached, you may need to sign out and back in to see these changes in your Watchlists menu.

## 3.2 Deleting Watchlists

To delete a personal Watchlist:

1. Select the personal Watchlist that you want to delete from the Watchlists menu.
2. Within the application, select the **Manage One View Watchlists** icon.
3. Use the drop-down menu to enter your Watchlist in the Name field.
4. Select the **Delete** icon.

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**Note:** You can only delete a personal Watchlist. Shared Watchlists must be deleted by someone with appropriate permissions using the Work with User Defined Objects application (P98220U/P98220W).

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## Using the EnterpriseOne Watchlists Mobile Application (Tools Release 9.2.1.2)

This chapter contains the following topics:

- ? [Prerequisites](#)
- ? [Viewing One View Watchlists on a Mobile Device](#)

### 4.1 Prerequisites

The EnterpriseOne Watchlists Mobile application (M95H01) requires system administrator configuration before it is available to individual users. Contact your system administrator to determine whether this application is available for use.

#### Application Security

An administrator must set up security for mobile enterprise applications using the standard application security in the EnterpriseOne Security Workbench. Application security can be defined by user, role, or using \*PUBLIC (all users).

In the Security Workbench, the only application security option that applies to mobile enterprise applications is the "Run" security option.

See Managing Application Security in the *JD Edwards EnterpriseOne Tools Security Administration Guide* for instructions on how to set up application security in EnterpriseOne.

#### User Defined Object (UDO) Security

Security options are available to prevent users from viewing Watchlists. If Watchlist security has been implemented, you may not see some or all shared Watchlists.

See the Managing Security for User Defined Objects chapter of the *JD Edwards EnterpriseOne Tools Security Administration Guide* for more information.

### 4.2 Viewing One View Watchlists on a Mobile Device

The EnterpriseOne Watchlists Mobile application (M95H01) provides access to JD Edwards One View Watchlists, which provide alerts based on user defined business conditions. This enables you to easily identify from your mobile device, whether a phone or tablet, when data has exceeded acceptable thresholds.

The Watchlists appear as tiles labeled with their names and display a number that represents a count of records that meet the query criteria. The Watchlist Mobile Application has three filter tabs:

- ? **All.** In this tab, all the Watchlists are displayed without any filtering criteria.

If a Watchlist is within the threshold, the record count appears in a blue box. If a Watchlist has surpassed the warning threshold, the record count appears in an orange box. If a Watchlist has surpassed its critical threshold, the record count appears in a red box.

- ⌚ **Warning.** In this tab, only those Watchlists that have surpassed the warning and critical threshold limits are displayed.
- ⌚ **Critical.** In this tab, only those Watchlists that have surpassed the critical threshold limits are displayed.

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**Note:** These thresholds were specified when the Watchlist was defined.

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**To view Watchlists:**

1. Open the Watchlists Mobile application by tapping the icon on your device and then logging in.

The system updates the Watchlists with the most current information. The Watchlists are displayed in two sections: **Personal** and **Shared**. Shared Watchlists are available system-wide unless they are restricted by security settings. Watchlists that you create are classified as personal Watchlists and appear under Personal on the My Watchlists menu. Personal Watchlists are available only to you.

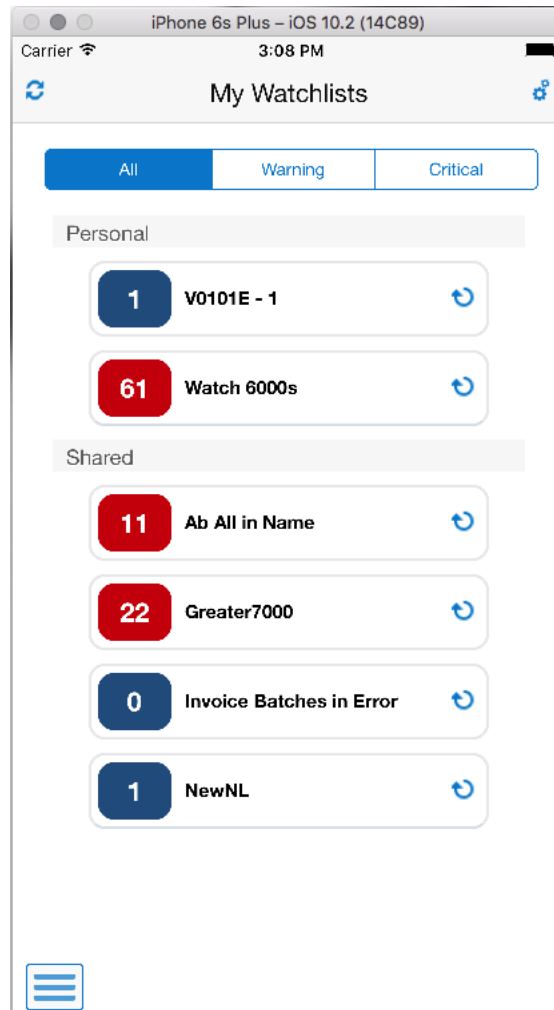
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**Note:** If you have more than 25 Watchlists, the first time that you open the application, only the first 25 are loaded and the rest are hidden. All Personal Watchlists are loaded before any Shared Watchlists. The number of displayed Watchlists is limited to 25 for performance reasons. You can then configure which Watchlists you want to see when using the mobile application.

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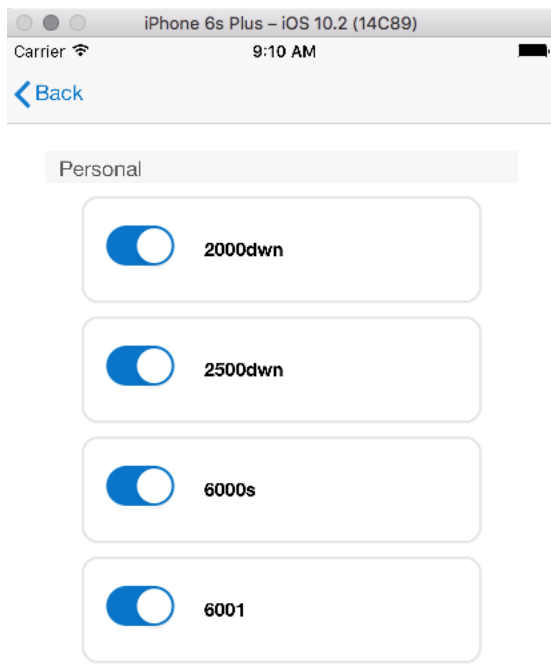
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2. Tap the All, Warning, or Critical tab to select which Watchlists you want to see.
3. Note the number in the box for each Watchlist. This number represents a count of records that meet the query criteria.
4. Tap the **Refresh** icon next to a Watchlist to recompute the Watchlist information on demand.
5. Tap the **Refresh All** icon displayed in the top left of the application to recompute all of the Watchlists' information.

#### Personalize which Watchlists you see:

1. Select the **Cog Wheel** icon in the upper right-hand corner to configure which Watchlists appear when you open the Watchlists Mobile application.
2. Turn the Watchlists on or off depending on whether you want them to appear in the mobile application.



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**Note:** If a newly added Watchlist falls alphabetically within the first 25 Watchlists, it will appear in the application by default until you configure it to be hidden. For example, if you had 24 Watchlists and added two new ones that are on the bottom of the list (they are sorted alphabetically), then one of them would be visible upon entry to the application and the other would be hidden because it is the 26th Watchlist.

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