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On User Interface

# CafeOne

A Basic Tutorial

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Editor's Note: CafeOne is a user interface feature introduced with E1 9.0 to help users customize their E1 experience. This article gives us a great overview of the evolution and functionality of CafeOne. It explains what it is and what it does. It then demonstrates a walk-through of how to set it up, including Publishing Groups, Enabling Base Forms, Creating layouts, and Publishing to others, with some additional features.

#### Introduction

In the pursuit to configure technology to meet business needs we inevitably run up against situations where we have to manually go to different sources of information to complete the real world task at hand. This is sometimes referred to as the "human factor". Beginning with JD Edwards 9.0.x, Oracle introduced CafeOne, which enables users to build bridges across to some of the disparate but related sources of information we use frequently to execute business transactions. Effectively, CafeOne is a new tool to help us do our jobs better. It helps us add value to the businesses that provide us our paychecks.

This first installment covers the basics of what CafeOne is and provides a roadmap for creating your first content with a basic layout. Then it is your turn to create the layouts your business will value and depend on. Just as no two snowflakes are alike, each CafeOne application is unique to your business needs. **Note:** 

- Implementing CafeOne does not require any package builds or promotions. However, it is helpful
  to have some developer experience, access to fast path, and knowledge of how data flows with the
  various business processes in your organization.
- All screen shots are taken from a JDE installation version 9.1.4. Depending on your specific version, your experience may vary slightly. However, all the fundamental principles and steps should be very similar.

#### About the Name - Where is it Found in JDE?

CafeOne is an acronym for <u>Common Application Framework</u> for <u>EnterpriseOne</u>. CafeOne leverages functionality from the Related Information Administration area. This may be familiar to those that have been around JD Edwards for a while or worked extensively with OneView. From the "EnterpriseOne Menus" select "EnterpriseOne Life Cycle Tools" then "System Administration Tools." From there you will find

"Related Information Administration" (Figure 1) which is where we find menu options to enable users to create and share/publish CafeOne content. It is recommended to create favorites or use fast path. Program numbers are included in parenthesis throughout this article for those who have fast path enabled.

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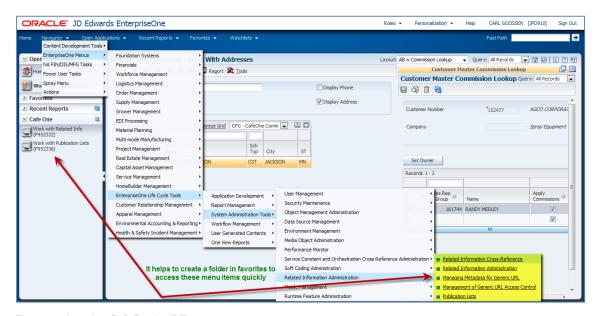


Figure 1 – Locating CafeOne in JDE

#### How it Works and What it Does

CafeOne enables a user to connect one or more pieces of information to a base JD Edwards form (screen) utilizing parameterized URLs. There are three basic types of connections:

- 1. JDE to another JDE form
- 2. JDE to a BI OBIEE report (this is the Oracle Middleware Business Intelligence product, which is basically an advanced SQL reporting tool with a user friendly interface)
- 3. URL / HTTP addresses

For each connection a window or pane is created. Users design layouts for how they want the different panes displayed. When creating a new connection, users specify conditions for when a pane shows up, and can define static or dynamic parameters. These layouts are user specific at first, but can also be shared across the business organization by publishing.

When a CafeOne layout is complete, information a user puts into the base form is automatically passed to the connections that have been configured. These separate panes then populate data from their respective areas; this data is filtered by the information and records selected in the base JDE form in the layout.

Furthermore, data in the embedded panes can be changed, and if the embedded pane is another JDE form the data will be entered, saved, or deleted in JDE. Figure 2 is an example of a simple CafeOne layout with the base Address Book form passing an address book number to the Customer Master Commission form.

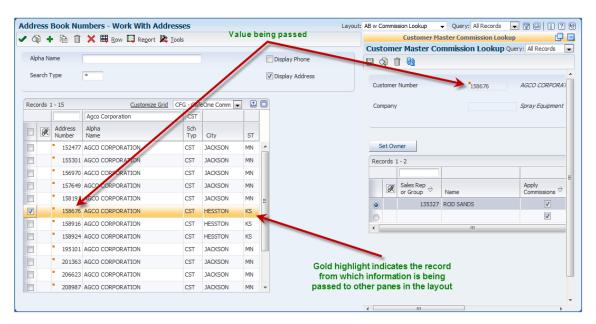


Figure 2 - Example CafeOne layout

The rest of this article is dedicated to a step by step walk through to establish a basic CafeOne result and some additional features beyond the basics.

# Let's Do It!! - A Step by Step Walk Through

In simplest form, the following four steps are involved with creating every CafeOne layout:

- 1. Work with Publication Lists (P952336)
- 2. Enable base form Related Information Revisions (P952332)
- 3. Create layout (Done in general JDE web session from base form)
- 4. Publish to others using user overrides (UO)

#### 1. Publishing Groups (P952336)

An important question to answer up front is: "Who is going to be creating content or ultimately using the CafeOne layout?" It is recommended to define publication lists (P952336) before enabling a form with related information. This is because JDE captures the publication list like a snapshot at the time a form is enabled with related information (P952332). There is no program functionality for JDE to go back after a publication list is changed and update any impacted records in P952332. The only way to get the updated publication list associated with the form at that point is to recreate new records on the related information table. Basically this amounts to starting over.

For this reason, it is helpful to create general lists such as \*PUBLIC which are not specific to individual users. Another strategy is to leverage role and security definitions. For example, if CSR end users are all associated with the role "42custserv", that role can be used instead of individual user names. Access to the CafeOne content is then governed by the end-user's inclusion or exclusion from 42custserv.

To create a new publication list in P952336 click on the "+" button (Figure 3).

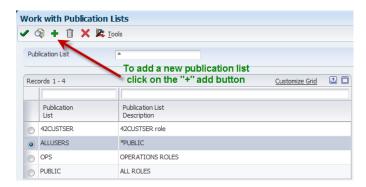


Figure 3 – Create new publication list

Name the new publication list and pick the users and/or roles that define that publication list (Figure 4).

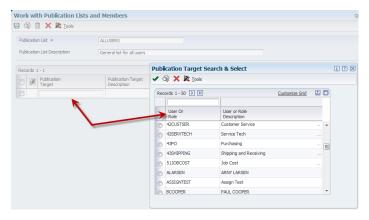


Figure 4 – Selecting users and/or roles to define publication list

Type "\*Public" for a general list that includes all users in JDE (Figure 5).



Figure 5 - \*Public publication list

Publication lists can include multiple users and roles, as shown in Figures 6 and 7.

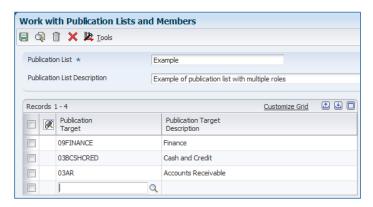


Figure 6 - Multiple roles on one publication list

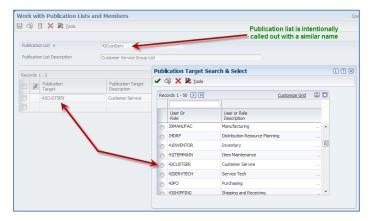


Figure 7 - Publication list designed for customer service end-users

### 2. Enable Base Form – Related Information Revisions (P952332)

Before going to related information revisions, first go to the location in JDE that you intend to use as your base form in your layout. Using the "i" (information) button in the upper right hand corner (Figure 8) obtain application and form information you will need for creating a new record in P952332.

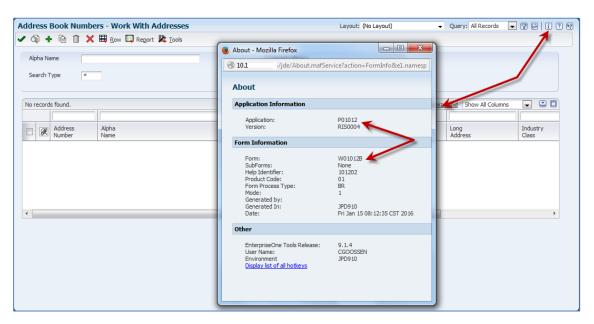


Figure 8 - Finding information about the application and form to be enabled for CafeOne

For this exercise we are selecting an address book form. Note that this is not a "power form". As of this writing, a power form cannot be used in a CafeOne layout. Next open up "Work with Related Information" (P952332) and in the command bar at the top of the JDE window, click "Add". This will bring up a dialog box similar to Figure 9. Place your own UserID in the "User or Role" field for this first record so you can design and test the layout. Notice the last box where the publication list you created in step 1 is needed.

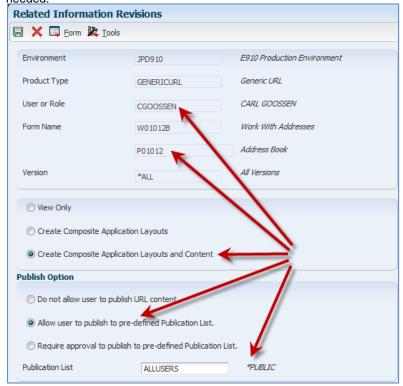


Figure 9 – Creating first of 2 records for "Work with Related Information"

After clicking the Save button you should be returned to the screen below, which will display a new record for the base form you will be using to create your CafeOne layout. Notice in Figure 10 that these records are environment specific.

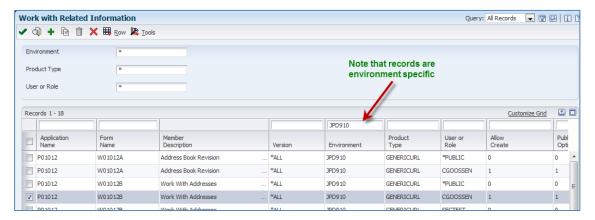


Figure 10 - "Work with Related Information" grid with new record to enable creating new layouts

Now create/add the second record to the related information table. This record will allow access to end users or consumers of the CafeOne layout. Notice in Figure 11 where the end user or role is not the administrator. Figure 12 shows the "Work with Related Information" grid with the second record that enables access to end users / consumers.

By creating a separate record, the administrator is able to specify that end users are allowed to "view only" and are not allowed to publish URL content (create their own CafeOne layout from this configuration). This means when an end user is in JDE on this form they will only have the option to use, or not use, the different layouts the administrator has published. Only the user with privileges from the first record (Figure 10) can create or edit CafeOne layouts.



Figure 11 – Creating 2<sup>nd</sup> of 2 records for "Work with Related Information" table for end users / consumers

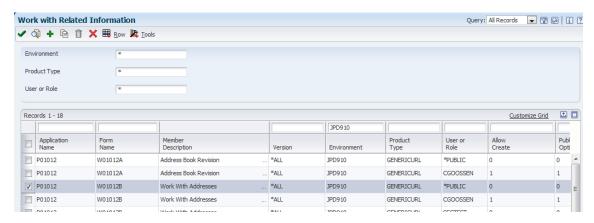


Figure 12 - "Work with Related Information" grid with 2nd new record to enable access to end users / consumers

With these two records now established on the "Work with Related Information" grid, CafeOne content can now be created. For simplicity we will not create any additional records and will move on to Step 3. However, additional records can be created to allow different groups different access to the same form, each one with specific CafeOne layouts published to the appropriate user group. This allows an administrator to provide multiple CafeOne solutions from the same general base form (i.e., address book inquiry) for finance, supply chain, HR, Asset Management and other diverse functions of a business. Since all CafeOne content is provided within existing roles and security parameters, no end user can gain access to information that has not already been granted to that user or role. Furthermore, if a user is not granted rights such as "delete record", that icon will not be displayed in the embedded JDE form.

#### 3. Create layout (Done in general JDE web session from base form)

To begin creating CafeOne content, go to the base form in JDE. In our example this is "Address Book Numbers – Work With Addresses". Before going any further, be sure to select a record in the base form grid. Figure 13 shows where in the upper left side of the screen to use the pull down menu "Personalization". Now that Step 2 above has been completed, "Edit Current Page" is available.

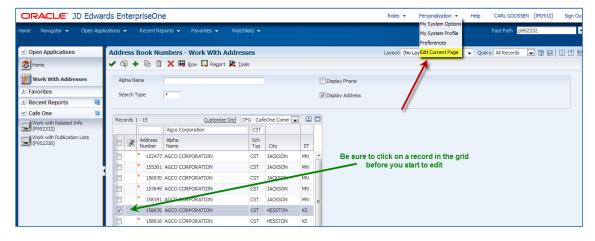


Figure 13 – Opening up the base form to add CafeOne content

When "Edit Current Page" is selected an additional ribbon will appear at the top of the screen (Figure 14). From this new ribbon select "Create New Content". This will initiate a pop up box for selecting the type of work space to create (Figure 15). For this exercise click on <u>and drag</u> the "EnterpriseOne" option from the pop up box to the side or bottom of the base form screen. JDE renders a shaded area for sizing. This can be edited later so be sure to make the pane large enough to work with while configuring the layout.

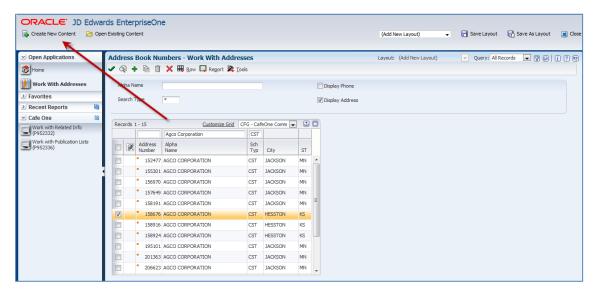


Figure 14 – Opening up new content

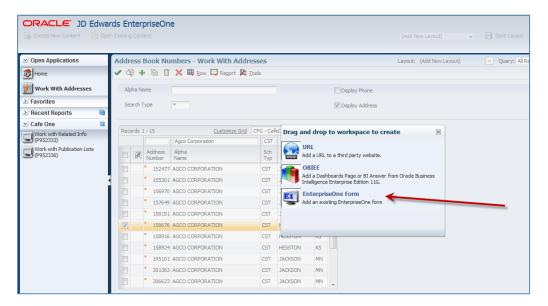


Figure 15 – Connecting to the type of CafeOne content used in the layout pane

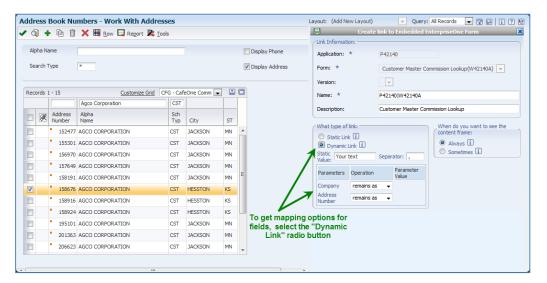


Figure 16 - Configuring the link for an embedded JDE form

In the window "Create link to Embedded EnterpriseOne Form" select the "Dynamic Link" radio button. Then find "Address Number". Select the pull down menu to select "is mapped to" (Figures 16 and 17), then click on the gold "+" displayed on the base form (Figure 18).

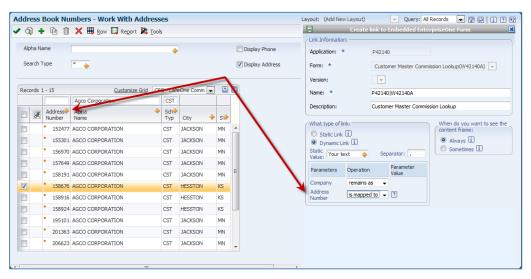


Figure 17 - Specify column / field of data to be passed to embedded JDE form

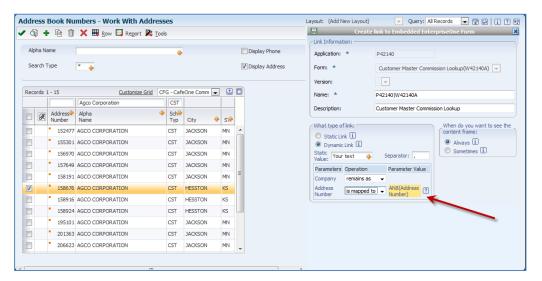


Figure 18 – Select "is mapped to" from pull down menu for "What type of link"

Figure 19 shows the result of the mapping configuration when data is present in the base form.

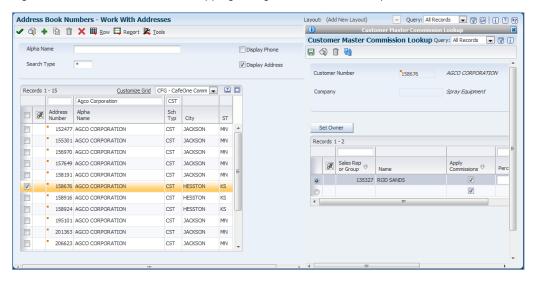


Figure 19 – Result of link within layout edit mode

There are some caveats when configuring CafeOne layouts. First, notice that the base form has a customized grid. It is helpful to customize the grid to optimize screen space to only what needs to be viewed. However, as of this writing only displayed fields can be linked / used in a CafeOne layout. For example, if your best or only way to link to the embedded JDE form requires the AN8 Address Number, it has to be displayed somewhere on the base form for the embedded form to work.

Secondly, it is advisable to have the base form populated with data as you create links in the new pane. A number of CafeOne configuration features (e.g., conditional display) cannot be done without data populated to "activate" filters. One way to help ensure this for end users is to use advanced queries to define default data selection in the base form. Since the embedded form is getting specific parameter values passed to it from the base form, advanced queries within an embedded form are not usually needed.

Also notice the base form commonly will have both header and grid (or detail) fields available for linking (see the gold "+" in both header and detail of Figure 17). When deciding which to use, consider how the end user

will be consuming the content provided as well as how that corresponds to where the data is in the life cycle of the business process involved. There are instances where the user may need only high level information, which would possibly indicate using the header data point. However, it may be the case that the user needs to see specific corresponding line items, which necessitates using a grid link.

Again for simplicity we will stop with one embedded form. However, advanced layout designs can have several panes that can be maximized, minimized, or displayed as separate windows. More on some of those options later but first do not forget to save and name <u>both</u> the embedded form / pane AND the layout (Figures 20 and 21).

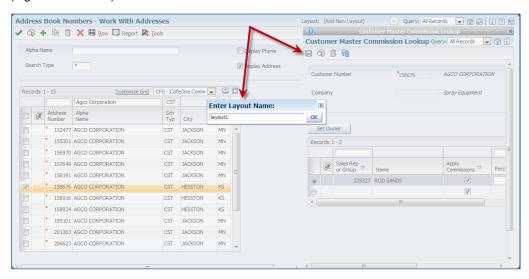


Figure 20 - Saving the pane/embedded form before exiting



Figure 21 - Saving the layout before exiting

Once the layout is saved, it shows up as a choice in your layouts dropdown box (Figure 22). At this point this layout is only visible to the administrator. If you look back at the top of the article, Figure 2 is the same layout populated with address book data. In the final step we will publish the layout to share with other end users.

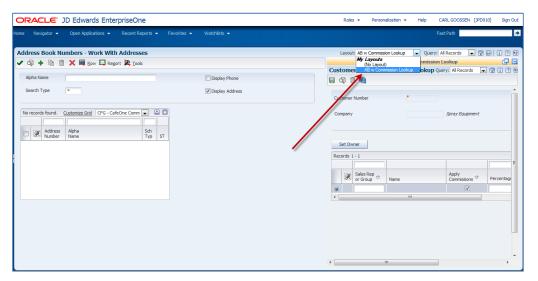


Figure 22 - Where the new layout option appears after being saved

#### 4. Publish to others using user overrides (UO)

All the difficult work is now done. All that is left to do is copy over some user overrides (UO) so that your end users can also see and select the new layout in their JDE sessions.

Fast path "UO" to get to "User Overrides – Work With User Overrides" and enter your UserID (or the UserID used to develop the layout). With the row selected, click on the copy icon (see the green arrow in Figure 23). This will bring up "User Overrides – Copy Overrides" (Figure 24).

Since the example CafeOne layout involves Address Book record maintenance, an appropriate role to publish this to would be "01AB" (Figure 24 and 25).

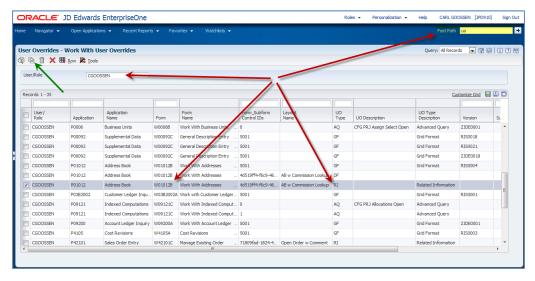


Figure 23 – Locating CafeOne the User Override

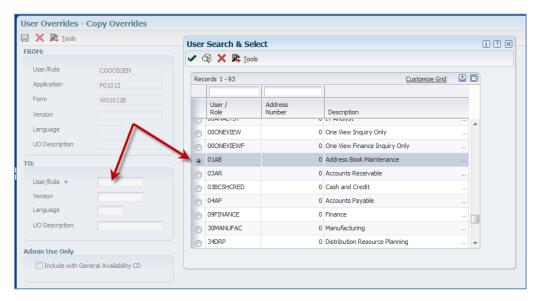


Figure 24 - Assign User/Role to new user override record

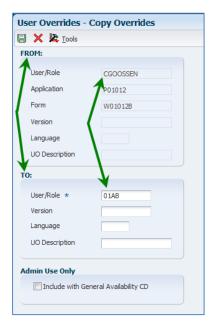


Figure 25 – Assigned User/Role prior to Save

Click the Save button and you are done. Note that sometimes cache has to be refreshed before end users will be able to view the published layout (Figure 26).

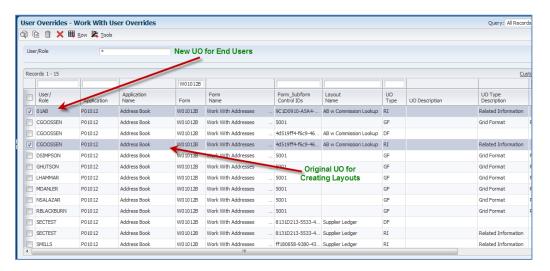


Figure 26 – User Overrides table with newly copied UO for end users

#### **Additional Features**

When creating / configuring a new layout there are several other features not discussed above (Figures 16-19) that make CafeOne both more flexible and powerful. First is that more than one link can be created to refine the data returned in the embedded form. In the Address Book example, the layout could be configured to also map the "Company" data column (Figure 27 red arrows). This restricts the output from the embedded form by both the Company and the Address Book values. It is very helpful to configure for precise data, but too many mapped columns may eliminate data that should be considered by the end user. It is important therefore to understand the business application well before adding too many columns to be mapped.

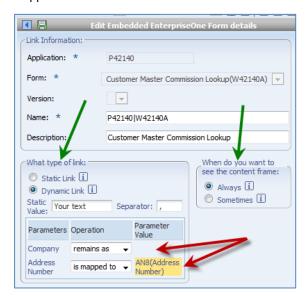


Figure 27 - Additional Features

Finally, there are options for specifying a static value in cases where a business desires a pane to act more like a performance tile. This may be a value such as a blanket PO#, TIN#, UPS # or other general reference value.

There may also be situations where the pane is not needed. The developer can specify a condition for when the pane is to be displayed. Examples where this is handy is when the pane provides a certain company, customer, or vendor specific data. In Figure 28 the pane is set up to be displayed only when the customer type is "CST" (a Ship To customer).

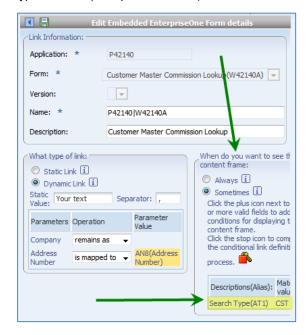


Figure 28 – Conditional Display Configuration

#### Conclusion

CafeOne is a powerful tool that is highly configurable to specific business needs without the usual package builds and promotions. Thus, it can be deployed quickly in business to make it easier for end users to do their jobs better. This article is only a primer to get you started with your first CafeOne layout. From there the possibilities are almost endless. Now it is up to you. Jump in and start with a basic layout today. Before you know it you will be an expert.

#### **Acknowledgements:**

Many sincere thanks to some very good friends who have been supportive, patient, and understanding through the years. I cannot count all the times Sarah Mills and Jeremy Harms made time to hear me out and show an "old CFO" how to do basic developer stuff, both in JDE and BI. Without their help and encouragement this article would not be possible.

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