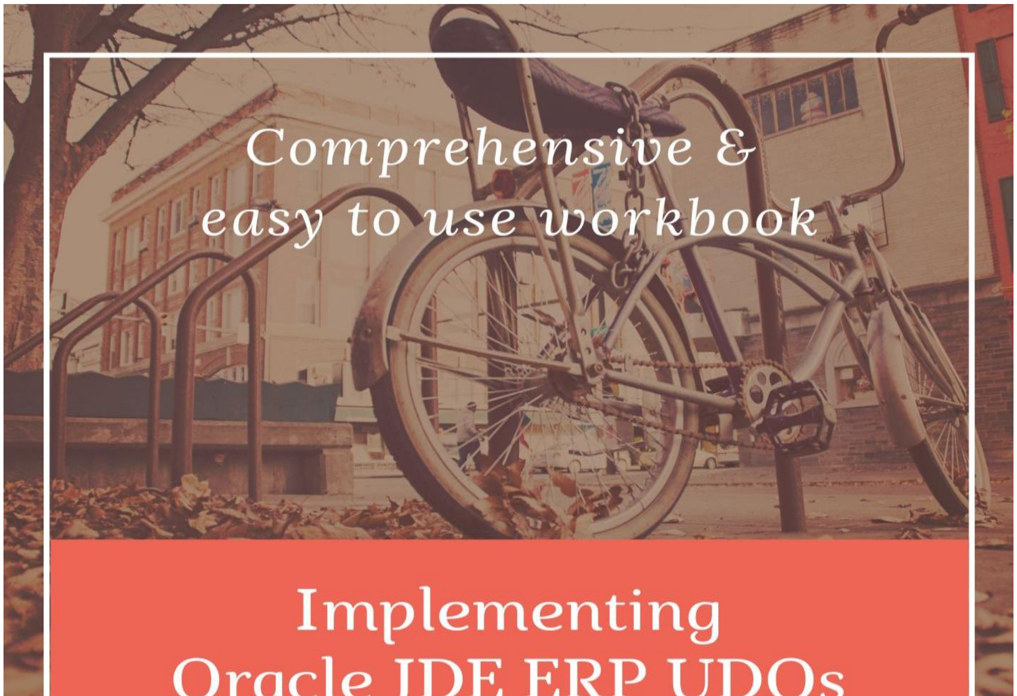

Comprehensive & easy to use workbook

Implementing Oracle JDE ERP UDOs (User Defined Objects)

Real Life Examples

MATT RAVIKUMAR

Published in 2025

Thank the Divine in making my dreams come true.

Thank my parents (MNS Mani & Lakshmi Mani) for their motivation and guidance.

"THE WHOLE LIFE IS A SUCCESSION OF DREAMS; MY AMBITION IS TO BE A CONSCIOUS DREAMER, THATS ALL."

— Swami Vivekananda

Key words: Oracle, JDE, JD Edwards, UDO, User Defined Objects, ERP

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Disclaimers

This book is about used cases on Oracle's JD Edwards Enterprise One ERP software tools, known as UDOs.

Oracle owns JDE software & copyrights.

No customer data is exposed since the book uses demo cycle making sample data.

This is to share the business requirements and help the user community in building these without waiting for IT resources. Any super or power user can start making these UDOs and go to IT for deployments.

Clients need to take care of the licensing and other training needs.

Role Security is super critical while granting access to UDO objects. These should not be enabled with generic roles with complete read-only access since critical data can be exported by temporary or intern employees/contractors.

“We are visitors on this planet. We have been here for one hundred years at the very most. During that period we must try to do something good, something useful, with our lives. if you contribute to other people's happiness, you will find the true meaning of life.”

— Dalai Lama XIV

Foreword

You want to know more about Oracle's JDE (JD Edwards Enterprise One) ERP (Enterprise Resource Planning) software UDO (User defined objects) objects. Every new or upgraded E1 (Enterprise One) project wants to implement this functionality totally. But project delays and budget limitations place UDOs into future phases and never gets done. In the meantime, end users are still working on stale reports and out of date data analytics.

You are a super user or have an interest in knowing cross functional business scenarios. If you go to the IT team, they lay out some templates but that needs constant changes. Some business users show interest in learning UDOs, but there is always constant chatter of material shortages in production and/or following up on open orders, vendor performance, data issues, management reporting, etc. You don't have time to creatively think of software solutions. This book will help you to figure out a solution to make use of the ERP investment much more and make end users happy & productive!

The primary focus is on distribution and manufacturing applications. The concept can be extended to Financial applications

Role Security is super critical while granting access to UDO objects. These should not be enabled with generic roles with complete read-only access since critical data can be exported by temporary or intern employees/contractors.

'Nothing great in the world has ever been accomplished without passion' - Georg Hegel

Watch List Creation - Basic Steps

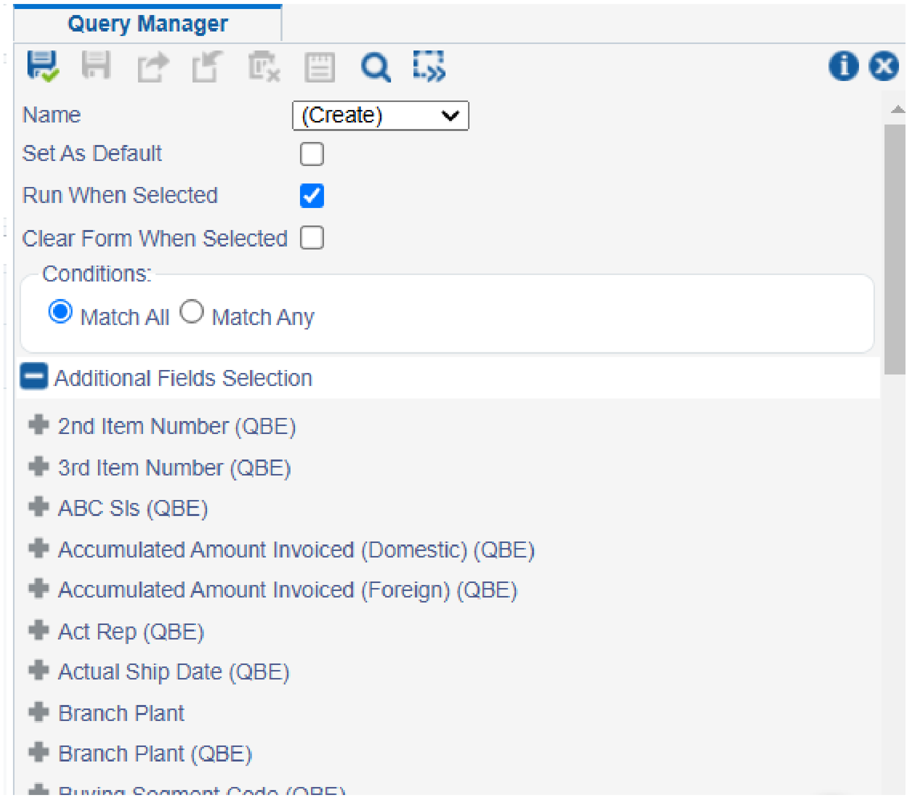
Step 1

For every watchlist, you will create a query first. This is applicable across any JDE applications and databrowser tables

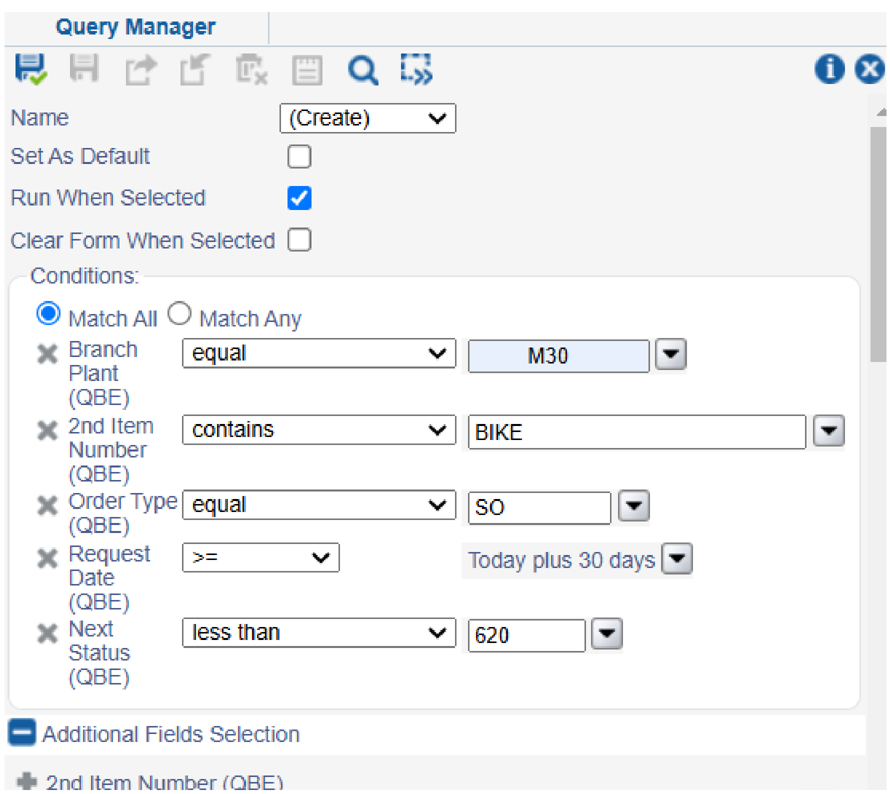
Create a query with unique yet intelligent naming convention. This helps to pick and save the same watchlist later

Step 2

Always select run when selected option. Use set as fault if this query is unique and you do not want to go all records option. Do not select this option, unless needed for security purposes. Expand the additional fields selection (shown below)


Query Manager
Name
(Create)
Set As Default
Run When Selected
Clear Form When Selected
Conditions:
Match All
Match Any
Additional Fields Selection
2nd Item Number (QBE)
3rd Item Number (QBE)
ABC Sls (QBE)
Accumulated Amount Invoiced (Domestic) (QBE)
Accumulated Amount Invoiced (Foreign) (QBE)
Act Rep (QBE)
Actual Ship Date (QBE)
Branch Plant
Branch Plant (QBE)

Step 3


Query Manager
Name
(Create)
Set As Default
Run When Selected
Clear Form When Selected
Conditions:
Match All
Match Any
Branch Plant (QBE)
equal
M30
2nd Item Number (QBE)
contains
BIKE
Order Type (QBE)
equal
SO
Request Date (QBE)
>=
Today plus 30 days
Next Status (QBE)
less than
620
Additional Fields Selection

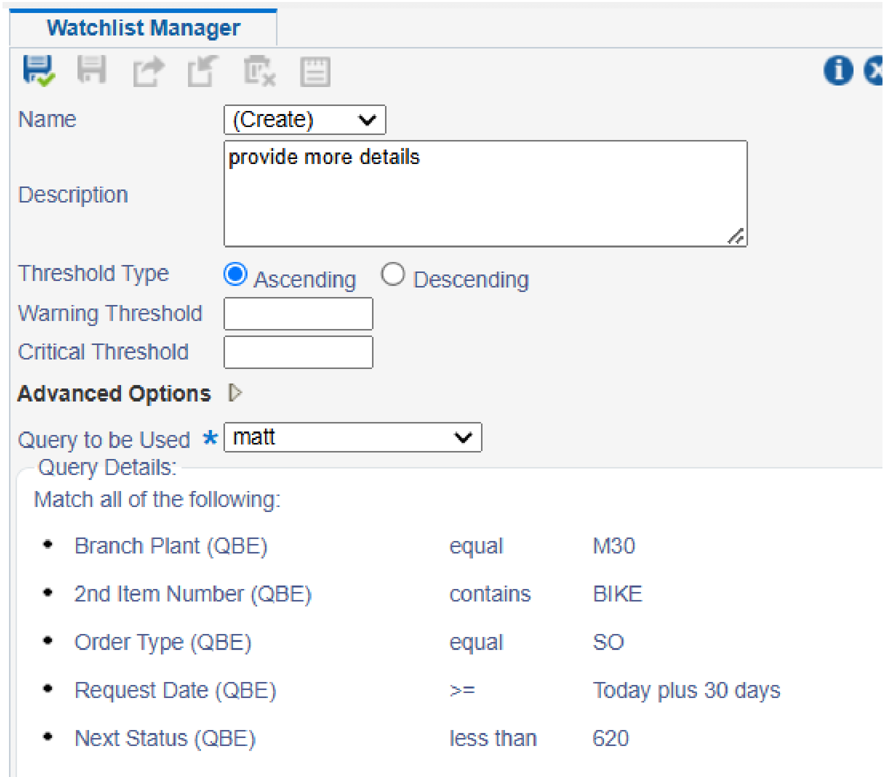
The above shows various fields selected with a variety of rules. Branch plant could be one value or use second drop down to use multiple values. 2nd item is an example to filter out specific product, order type could be one or multiple values. Request date has many choices on the first drop down. On the second drop down you can choose today + or - certain days (plus 30 days shown above). It could be days, weeks, or months

The last one next status shows an example of <620 status.

Note, all the above values are NOT required in any live watchlists. This above is a sample combination.

Step 4

After you create a watchlist, click the flag icon to create watchlist, if you are in the same window. JDE automatically takes the query you are working on. Provide more description details and press save. JDE comes up with the same query value. You can override the name if you want, but it will provide confusion later when you want to modify the queries later.


Watchlist Manager
Name
(Create)
Description
provide more details
Threshold Type
Ascending
Descending
Warning Threshold
Critical Threshold
Advanced Options
Query to be Used *
matt
Query Details:
Match all of the following:
Branch Plant (QBE) equal M30
2nd Item Number (QBE) contains BIKE
Order Type (QBE) equal SO
Request Date (QBE) >= Today plus 30 days
Next Status (QBE) less than 620

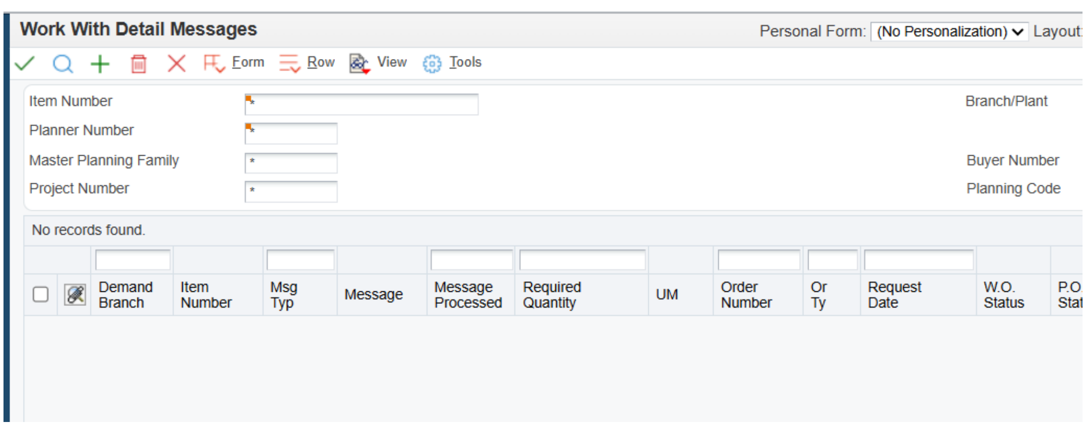
CAFÉ1 Creation - Basic Steps

Step 1

For every CAFE1 you will start with the base application. You will then add additional panes to the right either from the same application/different form (or) totally different application. You need to ensure you have security accessible to these applications.

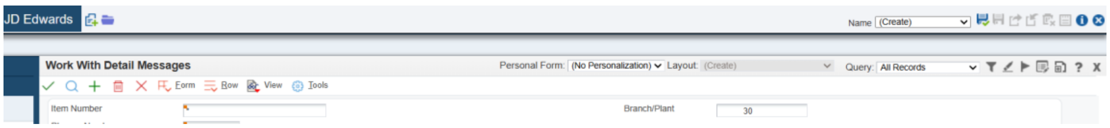
Step 2

Open the base application



Click edit form layout under your profile on the top right (where you manage your preferences, system profile, etc.). Screen shot now shown for this.

A new window tab opens on the top of your screen.

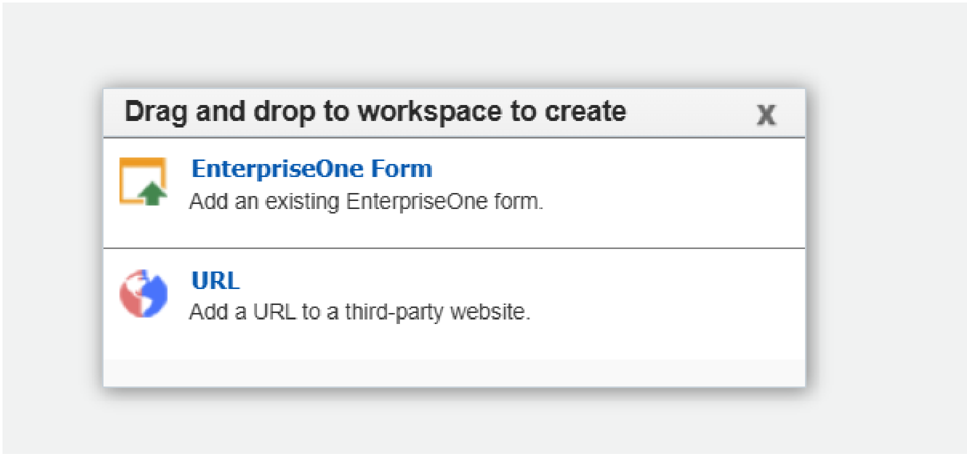


See below for bigger images

Left side pane for better clarity. Here you will click add and/or use folder to open. See below

Right side pane for better clarity. Here you will save the CAFE1 and/or revert changes. And close this application. See below

Click on the plus park on the left pane



You have to click and drag the E1 form option to your right or bottom of the base application.

On this new window, you will provide the required details. Click on dynamic link.

More information is provided in the respective CAFE1 sections in the book.

You will save this screen and go back to the + option to add more screens to the bottom.

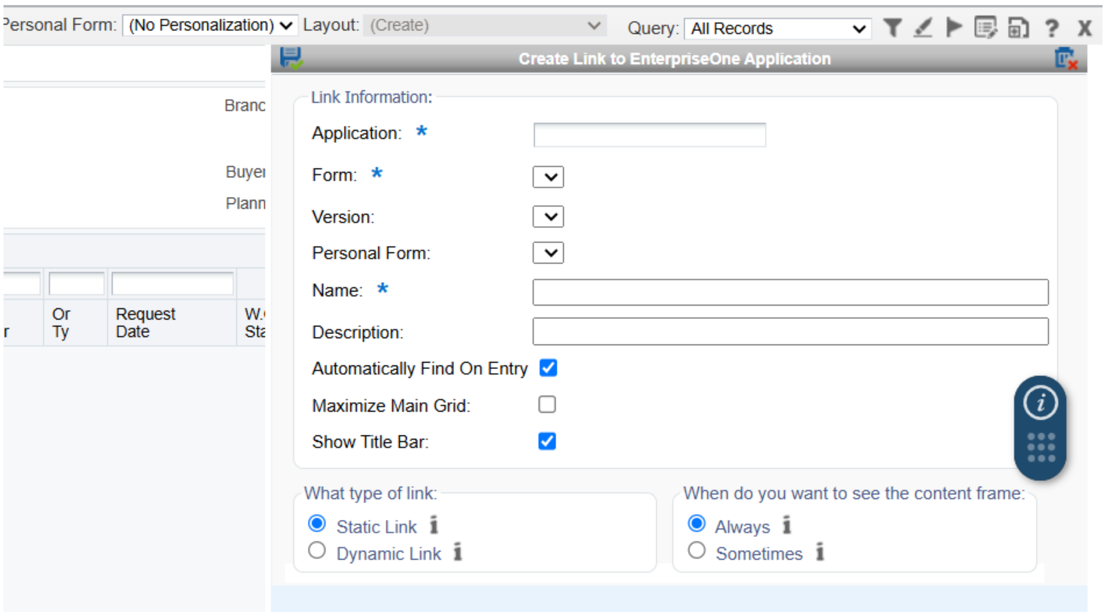
If you make mistakes, you can press delete or garbage can icon to start over.

If you need to edit your selection, information icons will show up once you are safe. Click on the info icon, then edit icon will come up to enable you to edit your previous selections.

If the window does not get enabled in form, version, name, etc. field click static link and then click dynamic link.

Remember, windows are attached to each other and reading space comes down.

CAFE1 is very useful for bigger monitors and not necessarily for small screen laptops



Like any other UDOs, unique name is required. This requires deployment and security profiles defined.

Overview of the contents and applications/tables involved.

JDE UDO SUMMARY SHEET			
#	Areas	Activity	App/Table
	Watchlists		
1	Distribution	Credit Cleared Alert	F4209
2		Order Backlog Alert	P42270
3		Orders Due Next 30 days	P42270
4		On hold Inventory Alert	P41280
5		Orders Delayed Past 30 days	P42270
6		Negative inventory Alert	P41271
7		Zero Price Items Alert	P41062
8		Zero Cost items alert	P41052
9		Customer Billing Instructions Changes	P03013
10		MRP items where Item Primary Supplier is blank Alert	P41026
11		Blanket Order Usage Alert	P4311
12		Purchase Order Overdue Alert	P4338
13		Purchase Order delayed Alert	P4338
14		Purchase Order Not Closed Age Analysis Alert	P4338
15		Supplier $ performance, discounts Alert	P042002
16		Item Usage Trace Inquiry Alert	P41273
17		ST/OT Backorder Aging Alert	P43264
18		Customer $ performance, Aging Alert	P03B2022
19		Re-Order Point Alert	P43011
20		Purchase Approvals Pending Alert	P43081
21	Manufactuing	Work Order Operations Delayed Alert	P31226
22		Work Order Scrap Quantity Surprises Alert	P31113
23		MRP PurOrd Messages B & O count Alert	P3411
24		MRP Workorder Messages B & O count Alert	P3411
25		MRP Items Messages display days less than leadtime	P3411
26		MRP PurOrd Messages PAST DUE count Alert	P3411
27		MRP WorkOrd Messages PAST DUE count	P3411
28		WO component issues qty surprises Alert	P48270
29		Work order exception status & age analysis Alert	P48013

30	Costing	Cost Ledger Surprises 08 vs 07 Alert	P41052
31		Cost Ledger Surprises 02 vs 07 Alert	P41052
32		Cost Ledger Surprises YTD vs Last Year Alert	P41052
33		Work order Engg threshold $ Alert	P48270
34		Work order Planned threshold $ Alert	P48270
35		Work order Actual threshold $ Alert	P48270
36		Work order Variance B cost type threshold $ Alert	P48270
37		Work order Variance C cost type threshold $ Alert	P48270
38	CAFE1	CAFE1 MRP Review Composite	P3411
39		CAFE1 Workorder Composite	P48270
40		CAFE1 ItemBranch Composite	P41026
41		CAFE1 Sales Orders Composite	P42270
42		CAFE1 Purchasing Composite	P4338
43		CAFE1 Item UOM Composite	P41026
44		CAFE1 Onhand vs Safetystock	P41271
45	Personal Form	Personal Form Work Order Entry	P48013
46		Personal Form Purchase Order Entry	P4310
47		Personal Form Sales Order Entry	P4210
48		Personal Form Address Book Revisions	P03013
49	Grid Extension	Grid Extension: ItemBranch	P41026
50		Grid Extension: Customer Billing Instructions	P01013

Overview of the contents and applications/tables involved.

LIST OF OBJECTS USED (sorted for consolidated security checks)	
P03B2022	Customer $ performance, Aging Alert
P03013	Customer Master
P4311	Expiring Blanket Orders Inquiry
P41026	Item Branch
P41062	Item Price Inquiry
P41280	Lot Master Availability
P48013	Manufacturing Work Order Processing
P3411	MRP/MPS Detail Message Revisions
P41270	One View Ave.Cost Analysis Item Ledger Inquiry
P43264	One View Backordered Items Not Received Inquiry
P41272	One View Inv Cost Analysis By Item As Of Inquiry
P41271	One View Inventory Valuation Analysis Inquiry
P41273	One View Item Location Trace
P42270	One View Open Sales Inquiry
P48290	One View Planning Analysis Inquiry
P042022	One View Supplier Ledger Inquiry
P48280	One View WO dispatch inquiry
P48270	One View Work Order Cost Analysis Inquiry
P43011	PO Generator
P43081	Purchase Approvals Pending
P4310	Purchase Orders
P4210	Sales Order Entry
P41052	UX One Item Cost Inquiry
P4338	UX ONE Purchase Order Detail Inquiry
P31113	Work order Inventory Issue
P31226	Workorder Production Status

Order Backlog Alert

Business Requirement:

As sales supervisor or manager, you want to know the backlog report real time. The days of the hard copy print out or emailed report are outdated. You want to focus on priority or VIP customers, who have your phone number or email contacts. You want to be ahead of the game before the customer calls you on the order status.

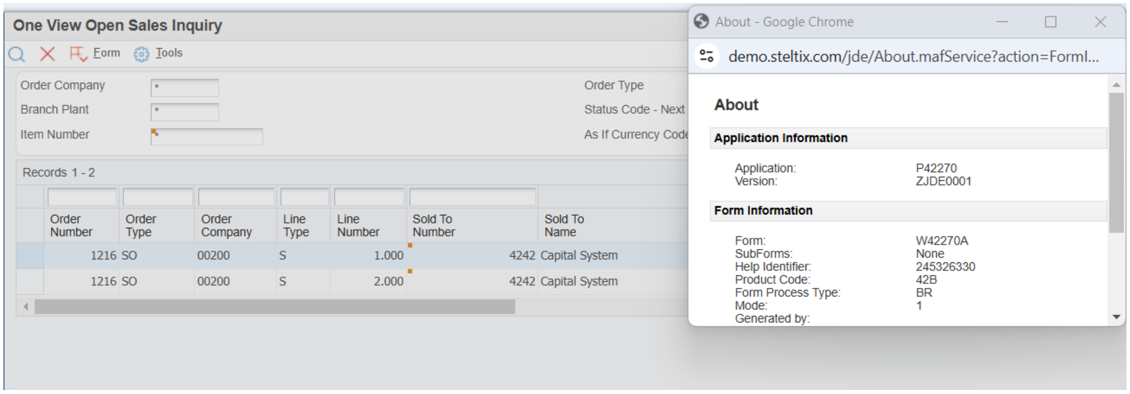
Technology used: One View Inquiry

Limitations: We are using One View standard inquiry which may not have all the hundreds of sales order header/details fields. But it serves the watchlist purposes.

Table/Application Used: P42270

Step 1

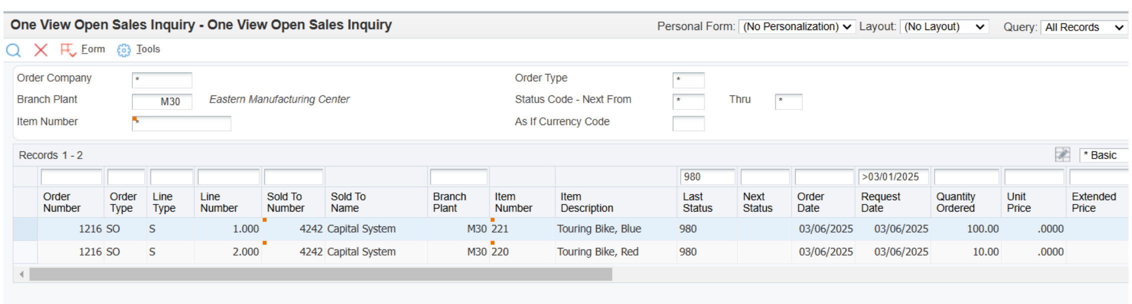
Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points.

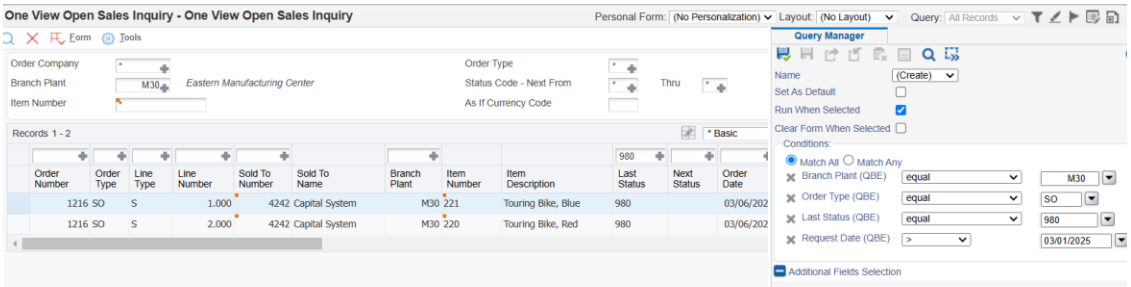
Tips: If you provide basic query values in the fields on what you intend to achieve, the query creation gets easy, since that process takes the values from this screen.

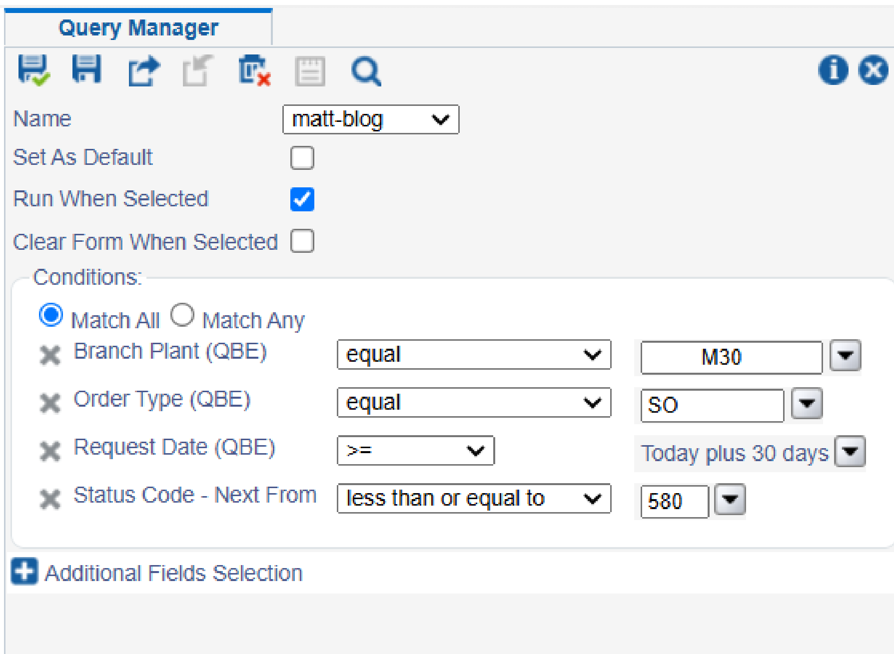


Step 3

Create a new query. Use the right pane selections to start with.

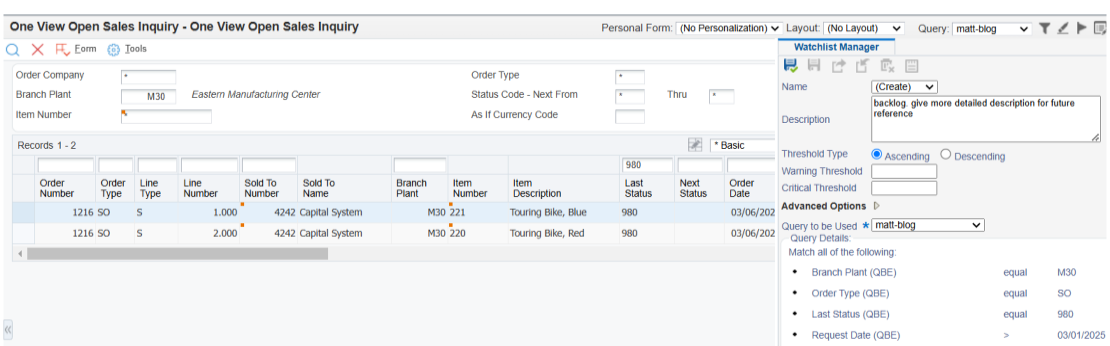
Branch plant, order type, last status (580 in this example), request date >today plus 30 days (as example). Save the query with a unique understandable name

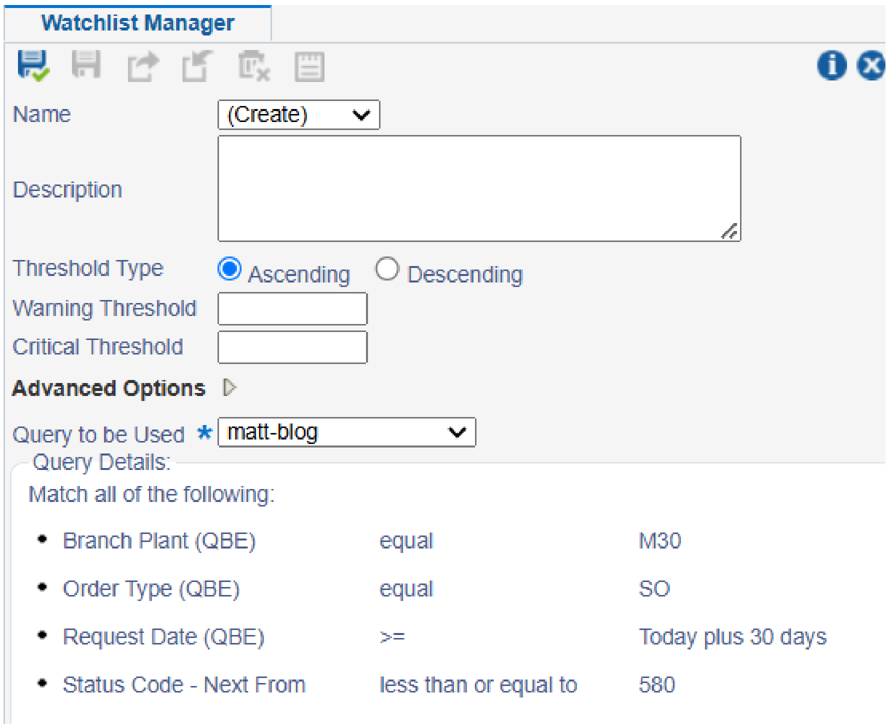




Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage





Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which can be used in any sales order doc type and on your priority customers' backlog. You can use sales order category codes to filter out critical customers if your company uses those catcodes. Also use filters like extended price or order quantity to get critical data for your business. You do not want another report on ALL backlog orders. This query can be used in S&OP review meetings for real-time inquiries. On the custom application grid, hide unwanted fields like company number, unit cost, etc. This custom grid can be linked to your specific security role profile if cost data is considered confidential to the wider audience.

Credit Cleared Alert

Business Requirement:

Your customers go through credit checks. JDE puts credit holds automatically and/or some user defined manual codes. As Customer Service Representative, you clear orders with the next steps for non-credit hold orders. You may not check periodically which orders got credit cleared. Sometimes, the customer calls back to inquire order status and then you go into scramble mode to make the products available for them. You may request the Finance team to inform your team periodically, but that stops after one or two weeks.

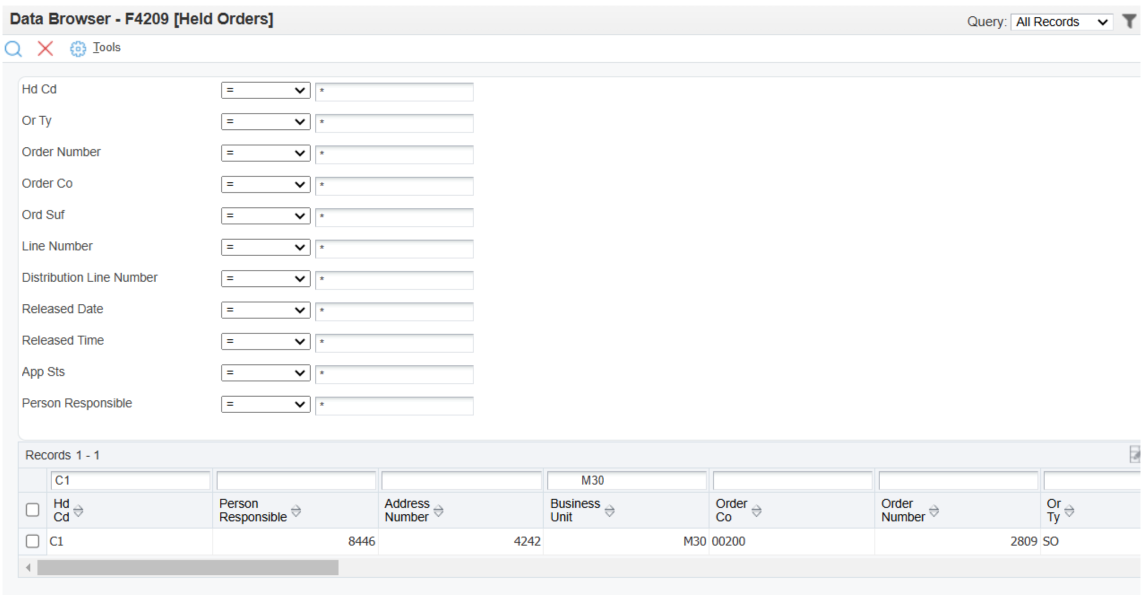
Technology used: UDO watchlist.

Limitations: The solution uses data browser table. User(s) need access to this functionality. Future JDE upgrades may allow watchlist on data browser tables without the need to open data browser. What we need is the data on the watchlist output, to highlight the number of orders released today (or date range) based on the data browser query

Table/Application Used: F4209 held orders

Step 1

Open data browser and use F4209



Step 2

Create a new query. Use the choices shown on the right pane first. This opens a multitude of watch lists for operations (one for sales and another for purchasing where hold codes are used)

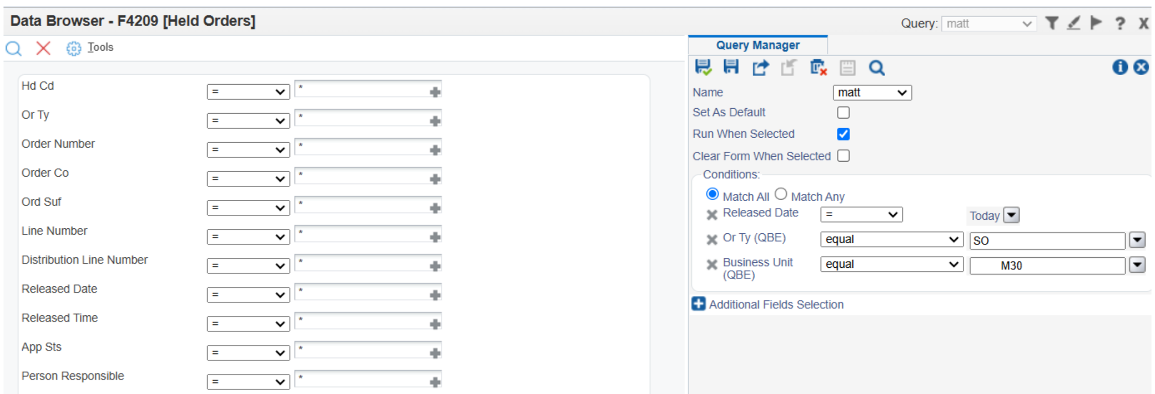
You can go creative with using =, <=, etc. on the release date value and use the option of today or <=7 days based on your business needs.

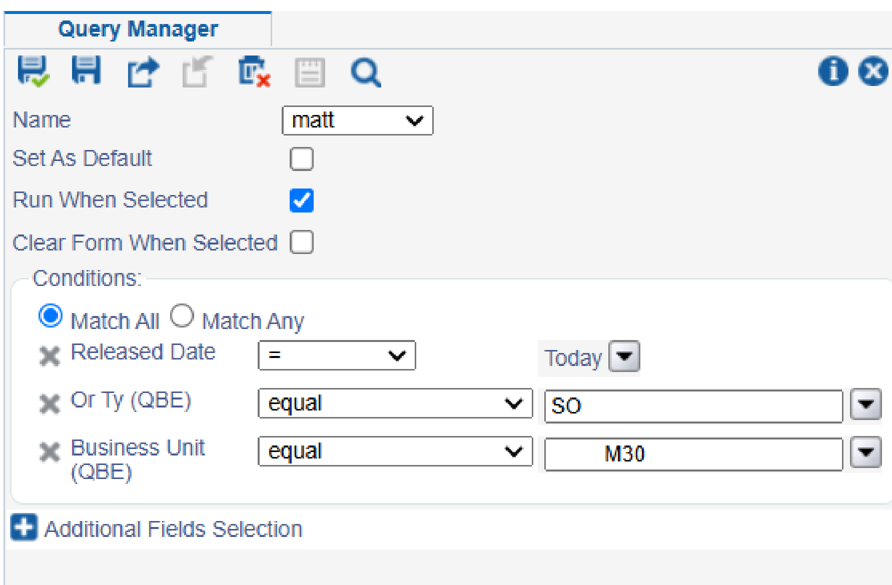
Use your popular sales order type in Or Ty field. In this example we want to know what credit hold (example C1) are released today.

Use one or many branch plants applicable, to avoid JDE taking a lot of time scanning all the table data.

Start with one easy example and then copy the query for various order types, branches, order holds (this field is not shown in the screen below)

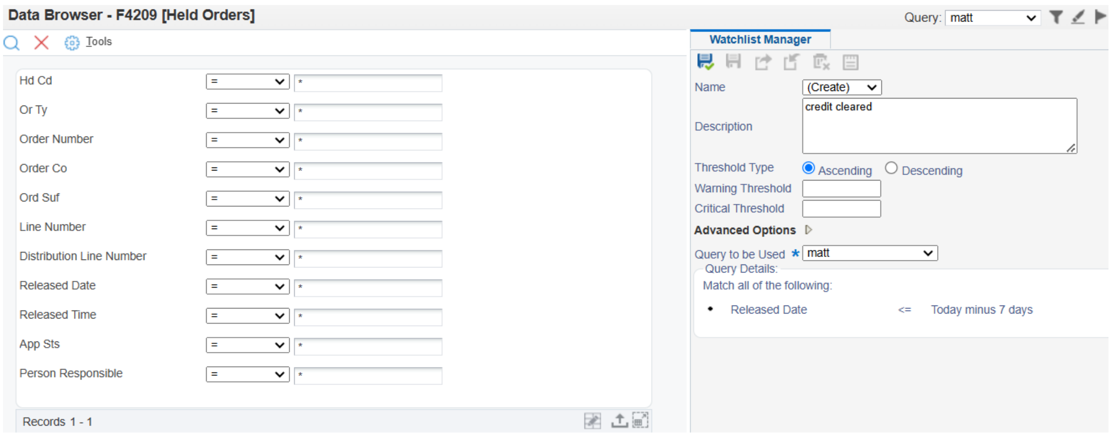
When you save the query (in this example below: matt), it will automatically show up in the personal queries option in the data browser. No need to input table, environment details once again.

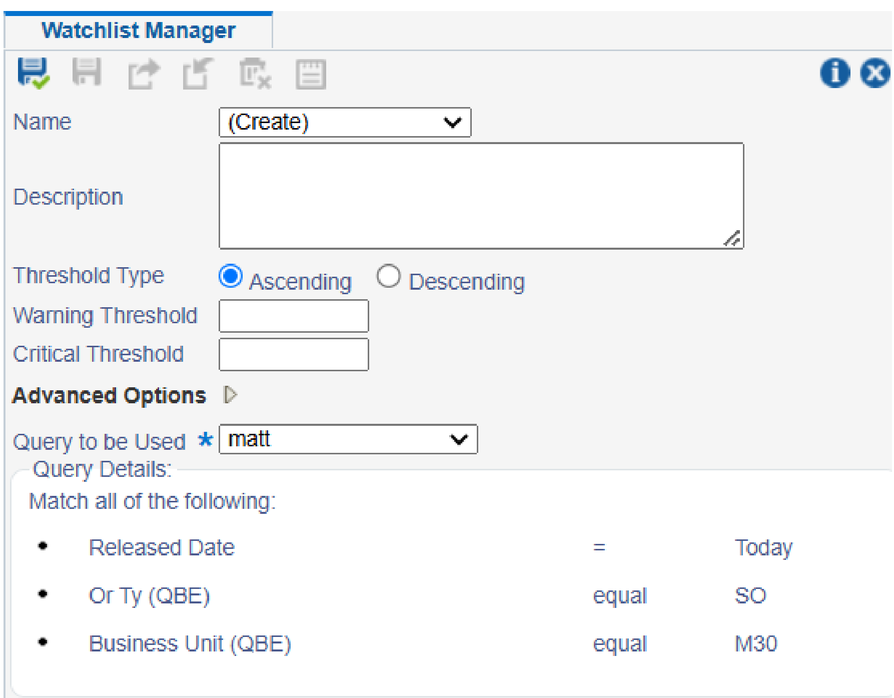




Step 3

Click on the watch list icon on the data browser. Select the query you previously created. Save the watchlist with a unique name





Step 4

If you go back to the main JDE application, open watchlists, you know one will show up. Press the refresh circle to get new data. The watchlist will show the count but will NOT open the data browser automatically. Open the data browser and select personal queries, look for your custom query. The window will open up with the watchlist output. You can extract branch/customer#/order# data to push the sales orders into the sales execution process.

NOTE: This is a very powerful watchlist which can be used in any sales order doc types and also purchase order doc types, where hold codes are placed and released by different functional groups. CSR needs to be aware of the happenings and this watchlist helps them to be alerted and responsive.

Tips: You can also find the same table if you want to know orders (sales or purchases) that went on a hold that day (or previous x days, if required). Use order date and hold code values in your query. A watch list will tell the orders that went on holds that day (or previous x days)

Orders Due Next 30 days

Business Requirement:

As sales supervisor or manager, your manager or management wants to know about future orders from specific or group of customers in a S&OP meeting. You don't have to take notes and go back to send that information in an email later. Run this watchlist and filter out data in real-time. Or use CAFE1 choices (discussed later) to present the data together with the customer you selected for the review.

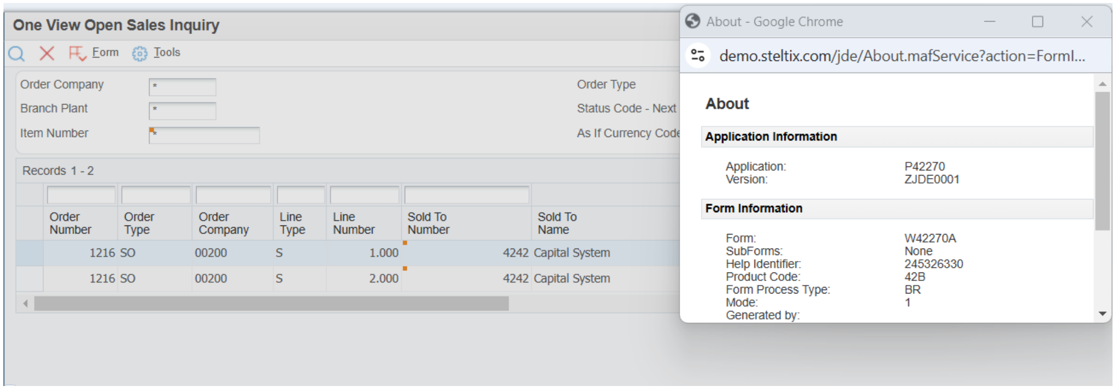
Technology used: One View Inquiry

Limitations: We are using One View standard inquiry which may not have all the hundreds of sales order header/details fields. But it serves the watchlist purposes.

Table/Application Used: P42270

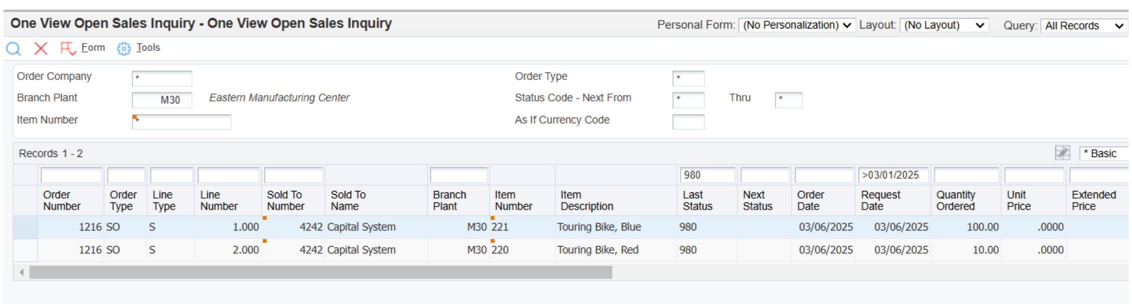
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

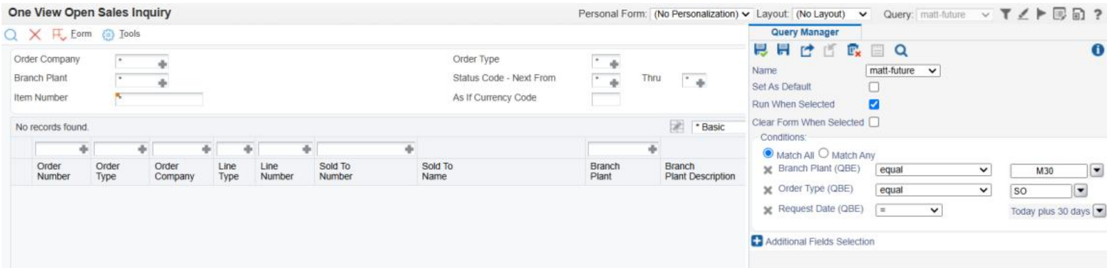
Customize the grid (example below), place some QBE values to get valid data points

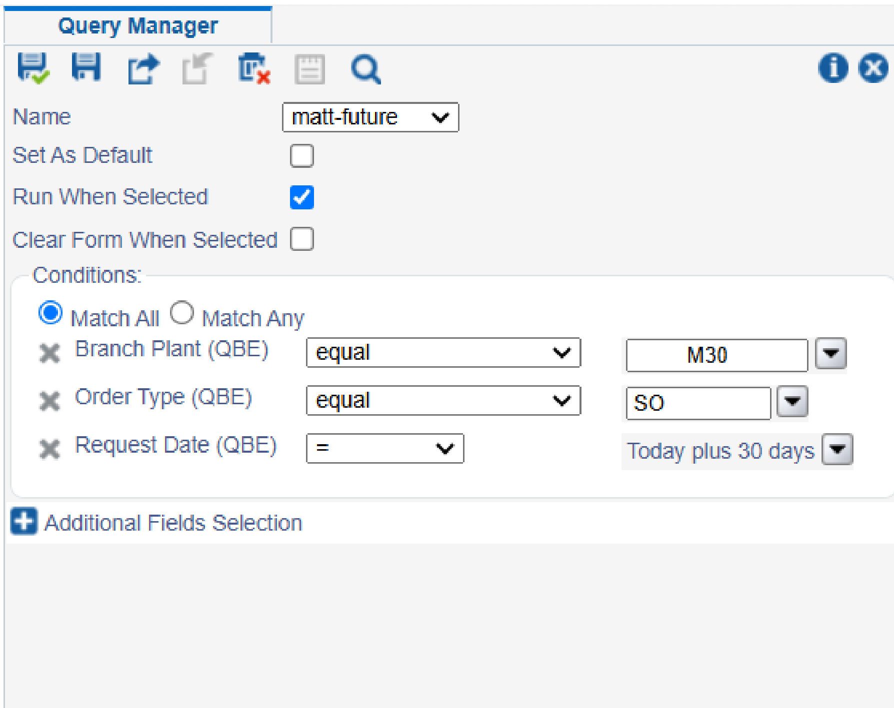


Step 3

Create a new query. Use the right pane selections to start with.

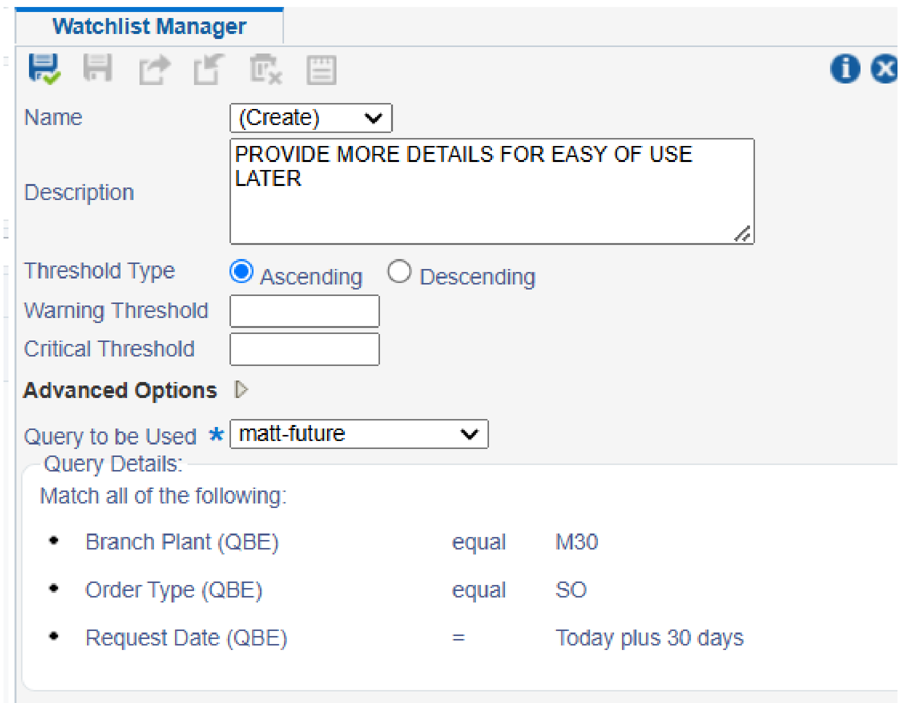
Branch plant, order type, request date = today plus 30 days (as example). Save the query with a unique understandable name




Query Manager
Name
matt-future
Set As Default
Run When Selected
Clear Form When Selected
Conditions:
Match All
Match Any
Branch Plant (QBE)
equal
M30
Order Type (QBE)
equal
SO
Request Date (QBE)
=
Today plus 30 days
Additional Fields Selection

Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which can be used in any sales order doc type and on your priority customers. You can use sales order category codes to filter out critical customers if your company uses those catcodes. Also use filters like extended price or order quantity to get critical data for your business. You do not want another report on ALL future orders. This query can be used in S&OP review meetings for real-time inquiries. On the custom application grid, hide unwanted fields like company number, unit cost, etc. This custom grid can be linked to your specific security role profile if cost data is considered confidential to the wider audience.

Orders Delayed Past 30 days

Business Requirement:

As sales supervisor or manager, your manager or management wants to know PAST DUE orders from specific or group of customers in a S&OP meeting. You don't have to take notes and go back to send that information in an email later. Run this watchlist and filter out data in real-time. Or use CAFE1 choices (discussed later) to present the data together with the customer you selected for the review.

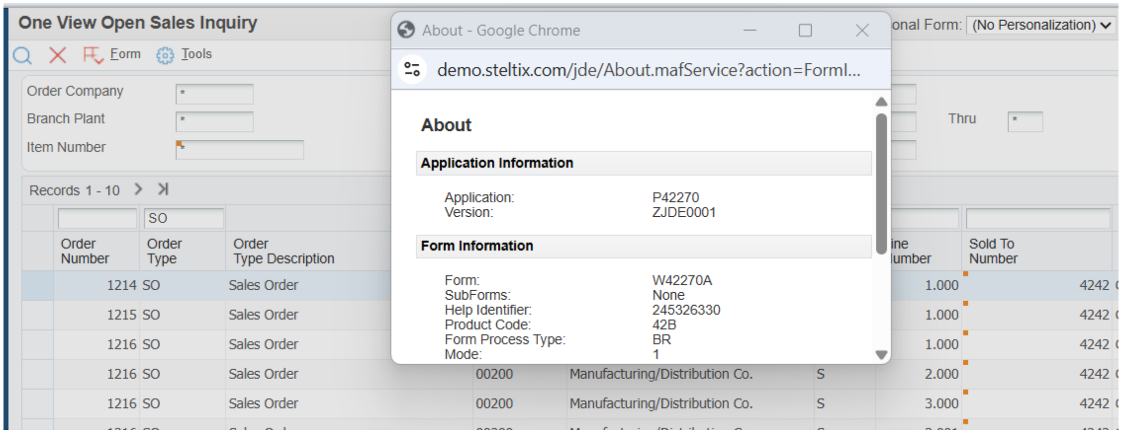
Technology used: One View Inquiry

Limitations: We are using One View standard inquiry which may not have all the hundreds of sales order header/details fields. But it serves the watchlist purposes.

Table/Application Used: P42270

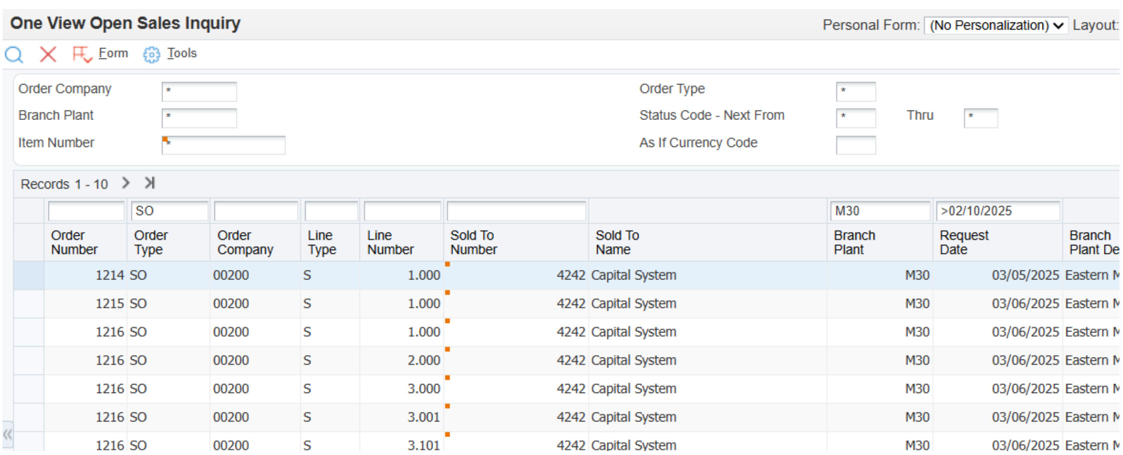
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

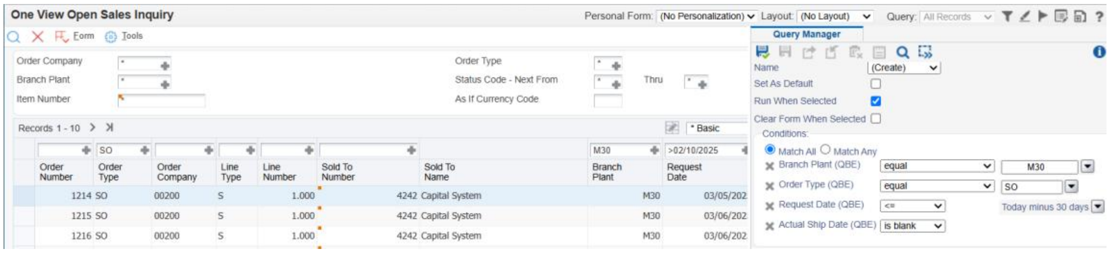
Customize the grid (example below), place some QBE values to get valid data points

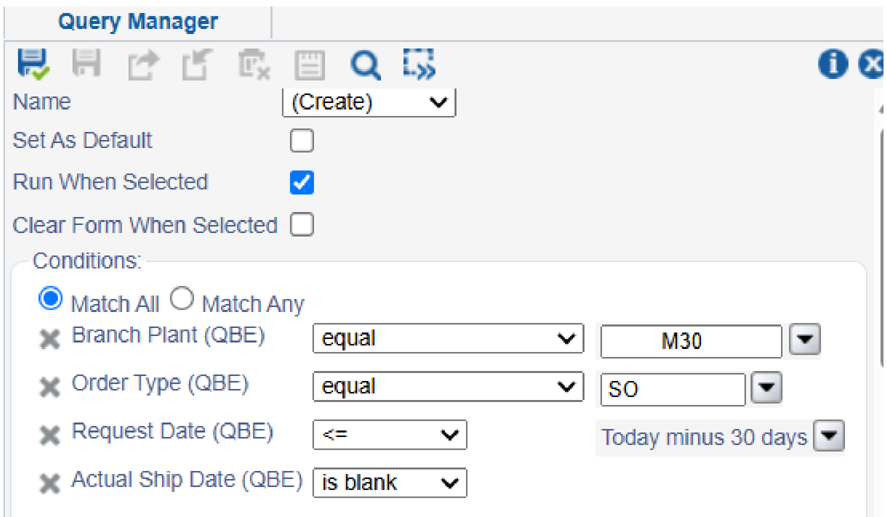


Step 3

Create a new query. Use the right pane selections to start with.

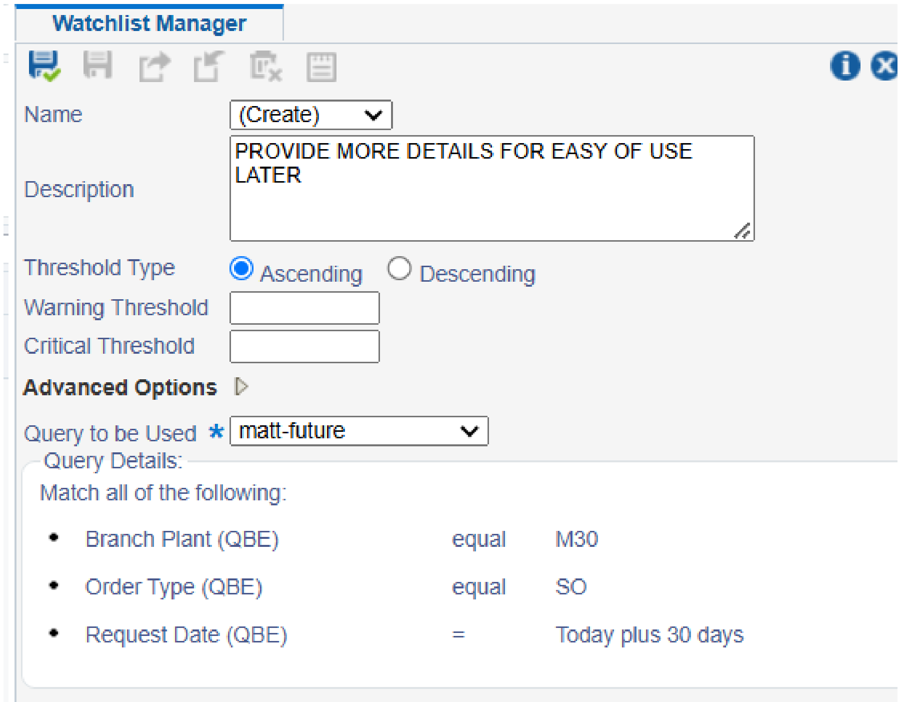
Branch plant, order type, request date <= today minus 30 days (as example). And where actual ship date is blank. Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which can be used in any sales order doc type and on your priority customers. You can use sales order category codes to filter out critical customers if your company uses those catcodes. Also use filters like extended price or order quantity to get critical data for your business. You do not want another report on ALL BACKLOG orders. This query can be used in S&OP review meetings for real-time inquiries. On the custom application grid, hide unwanted fields like company number, unit cost, etc. This custom grid can be linked to your specific security role profile if cost data is considered confidential to the wider audience.

Customer Billing Instructions Changes

Business Requirement:

Address book additions and modifications are managed by a different functional group. This includes customer master, customer billing instructions.

For example, you have a mix of customers who take partial orders (not order lines) and some who do not take partial orders. The customer sends a complaint that their orders were partially shipped. As CSR or CSR Manager you can have this watchlist to know your exception customer list.

This example can be expanded into fields like backorder allowed, partial order line shipment, etc.

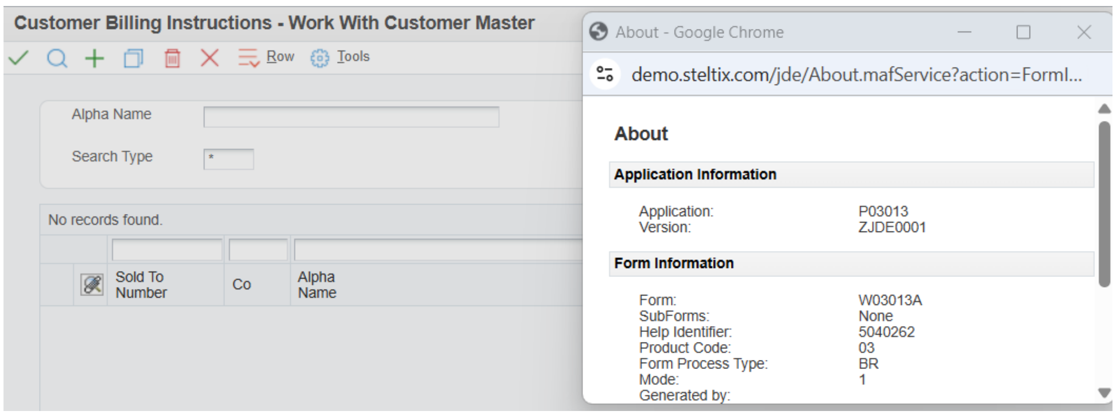
Technology used: Customer Master

Limitations: Ensure security is available on read only mode. The watch list does not allow making updates anyway

Table/Application Used: P03013

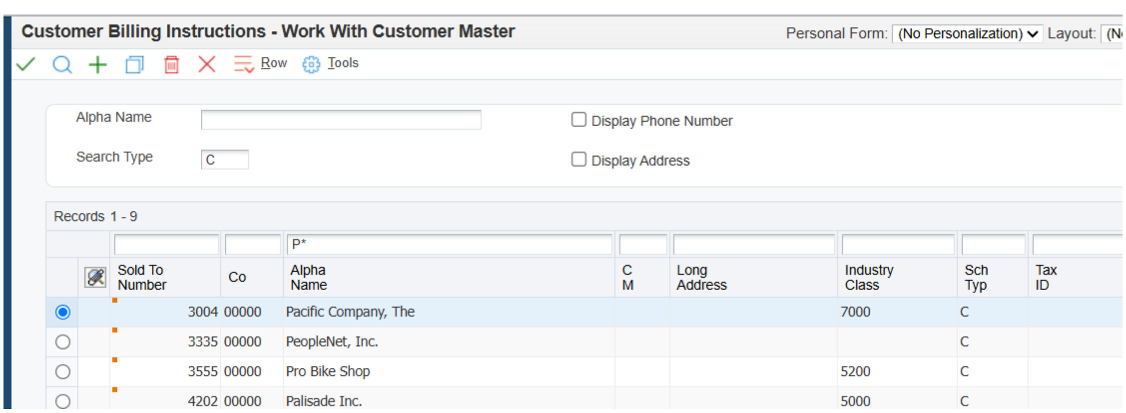
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

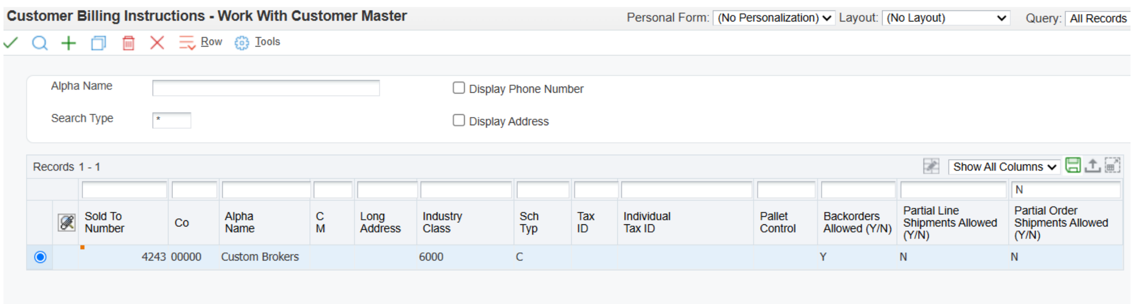


Step 2

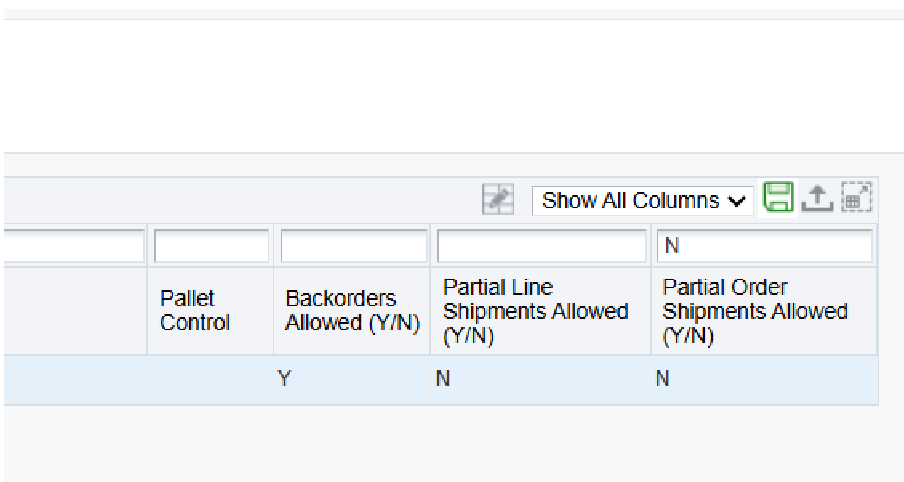
Customize the grid (example below), place some QBE values to get valid data points



Three extra fields are added to the grid using grid extension. See section on Grid Extensions on how to execute this step.



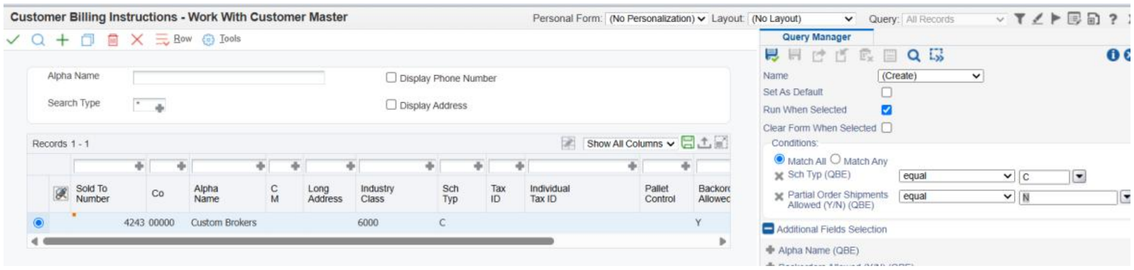
Closer view of the grid extension fields.

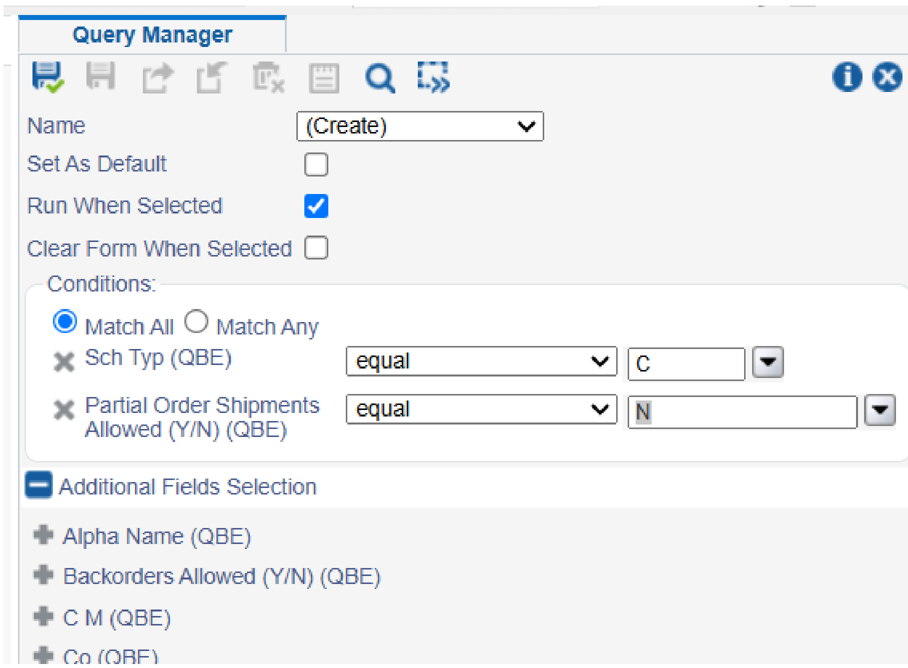


Step 3

Create a new query. Use the right pane selections to start with.

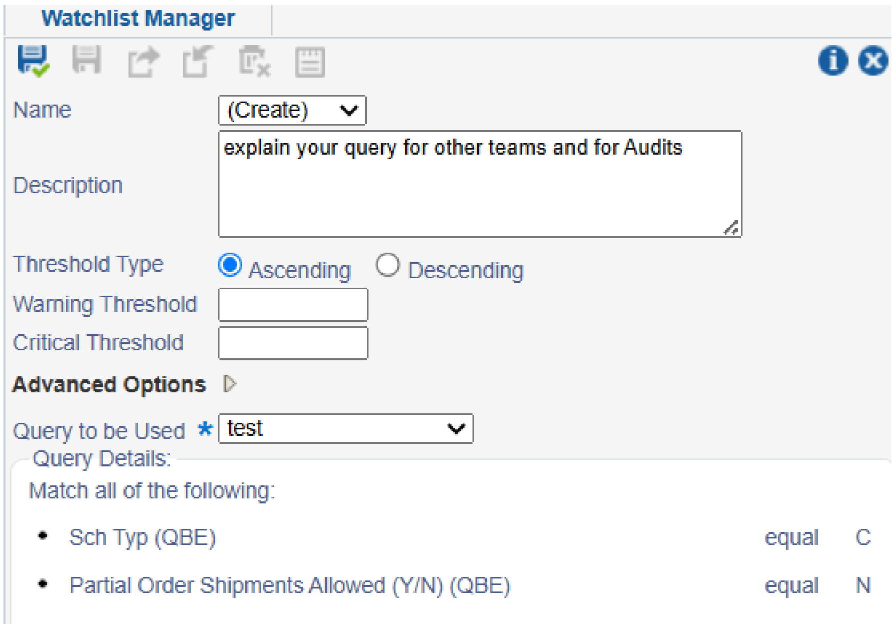
In this example, address type=C and partial order shipment=N are selected. If you bring date updated field in the grid extension, you add to this query to get data that got changed past 30 days (as an example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This watch list helps to track customer configurations like order partials, back orders, etc. Very critical in large customer base organizations. The same concept can be used for vendor master too.

On hold Inventory Alert

Business Requirement:

You want to know the hold codes of the item's inventory that has an on-hand balance. Your goal is to expedite the release of hold codes to fulfill the customer demands. Instead of asking for other functional resources or IT for that report, you can build your own watchlist.

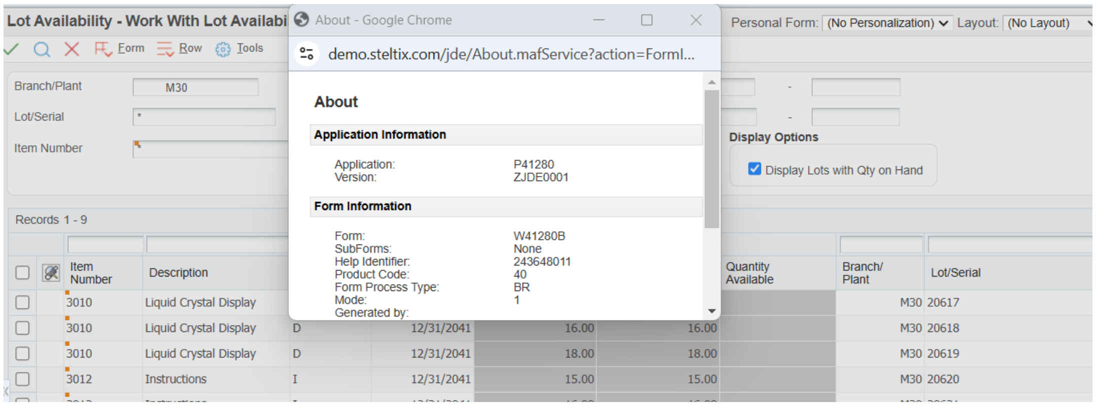
Technology used: UDO watchlist.

Limitations: This is real time data and does not include receipt routing holds/in transits

Table/Application Used: P41280

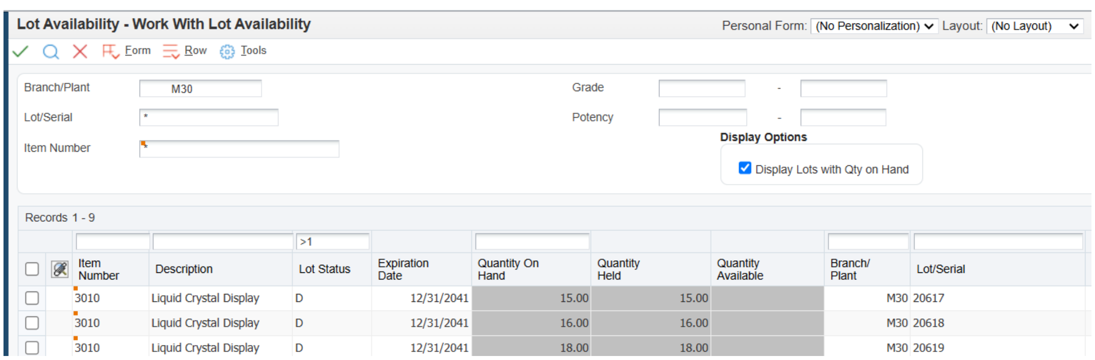
Step 1

Open Lot availability application



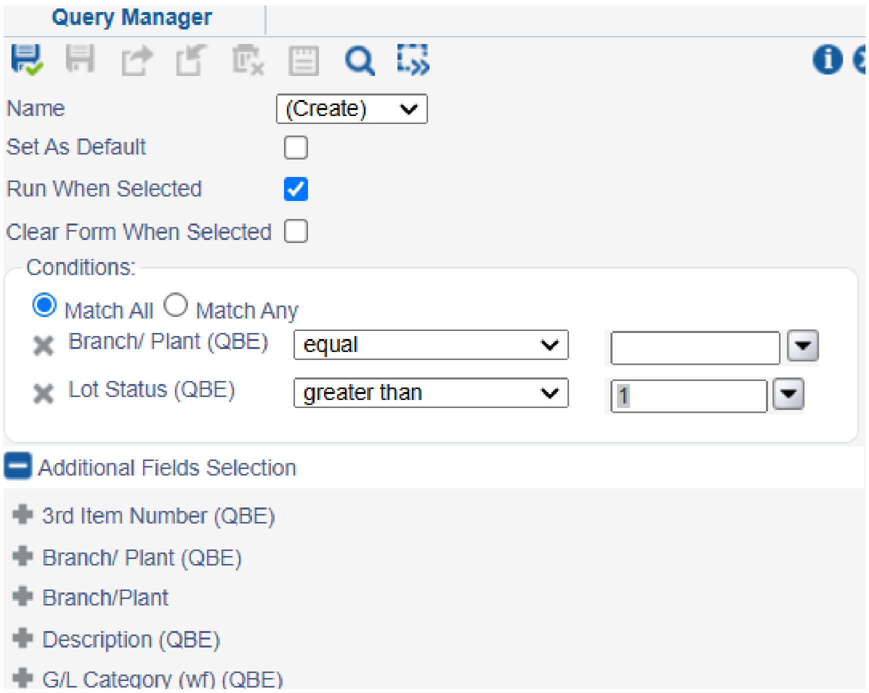
Step 2

Enter your branch and place >1 in lot status field. Make grid customization to hide unwanted fields.



Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a watchlist for this query, give the same name.

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which can be used in lot holds, lots that are expiring soon, or lots that have expired long time back. There are also JDE static reports on this subject. Watchlists are real-time and that can be shared to other functional groups through role security. Only lot hold concept is explained in this example page.

Negative inventory Alert

Business Requirement:

The best business practice is NOT to make inventory go negative!. But things do happen in business. If you have NOT turned OFF going negative in workorder issues, work order completion, inventory receipts, inventory adjustments, etc. Your inventory goes negative. This impacts MRP and also inventory valuation reports. Some companies place a large negative inventory quantity just to alert users that the product/component is no longer used. Again, outdated practice!

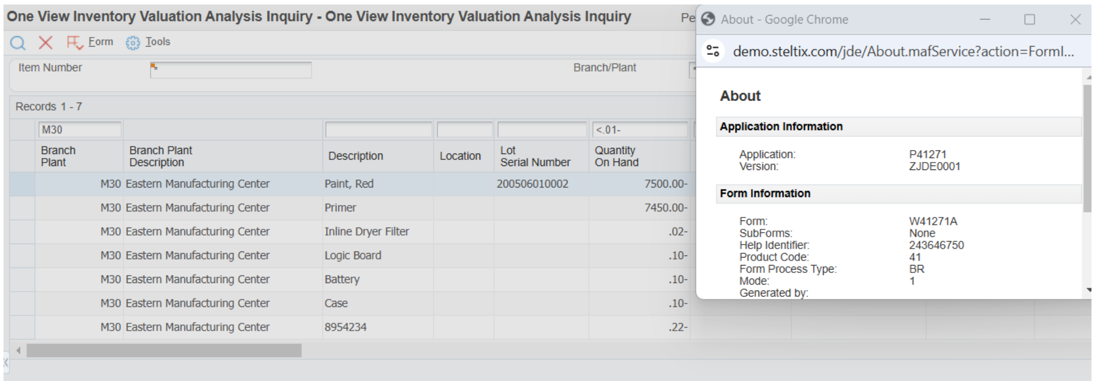
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41271

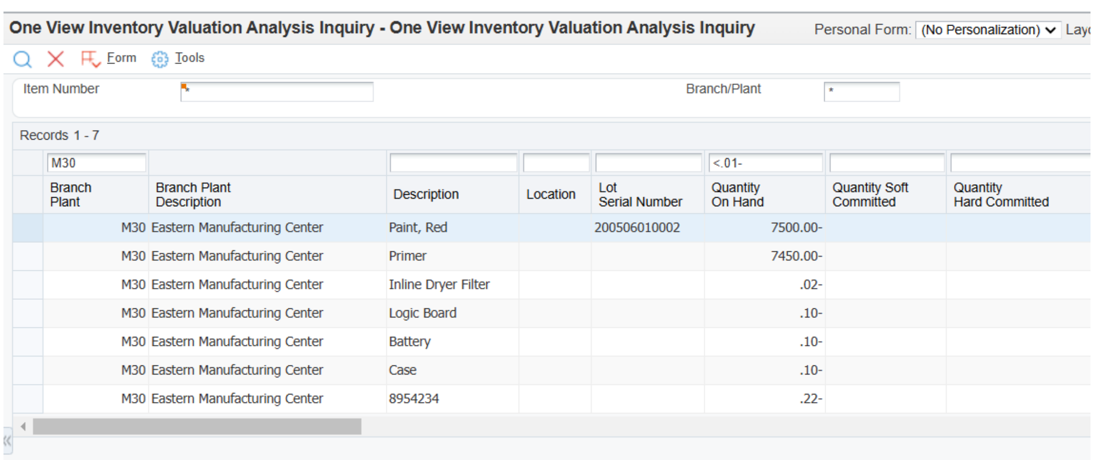
Step 1

Open Lot availability application



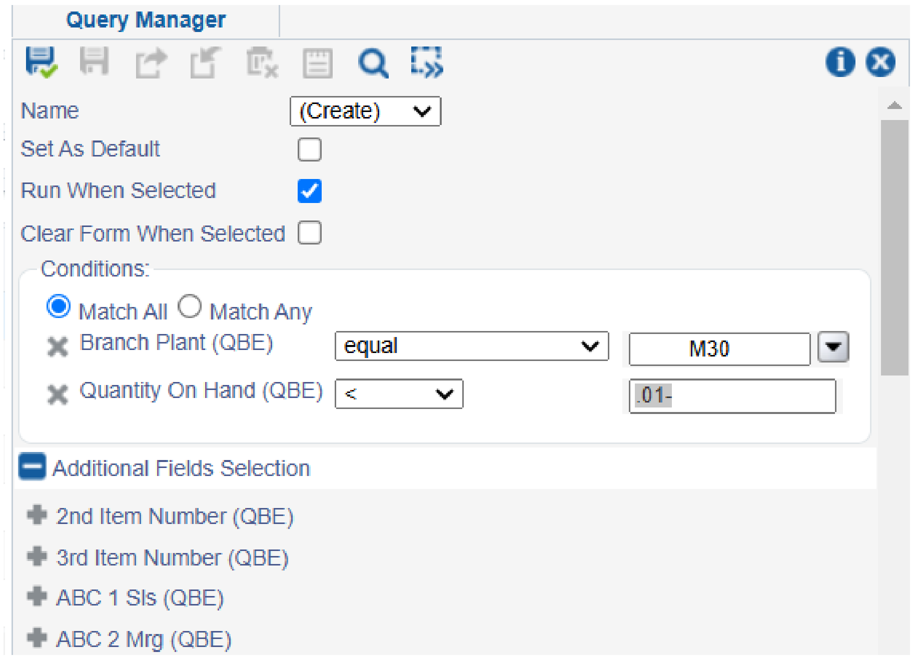
Step 2

Enter your branch and place <0.01 in qty on hand field. Make grid customization to hide unwanted fields.



Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a watchlist for this query, give the same name.

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This example can be expanded to find same lots available in multiple locations or branches (if allowed in your configurations) and filter on ABC codes (if updated periodically). Another tip is using this example to figure out hard committed inventory on key products and/or components. Any large volume of data on those fields may mean you are NOT running sales; purchases and work order **reposts.**

Zero Cost items alert

Business Requirement:

You need to have cost associated with your purchased items and cost rolled up for your manufactured products. Any transactions conducted with zero costs will impact on your accounting books and finance need to make journal entries. Most importantly, these zero costs sit in the system for many weeks or months, thereby impacting a lot of reports used by management.

If you are in PDM group and/or in Costing group, you need to use this watchlist and get alerts promptly. This is very critical for short cycle time manufactured products in a high NPI (new product introductions) environment.

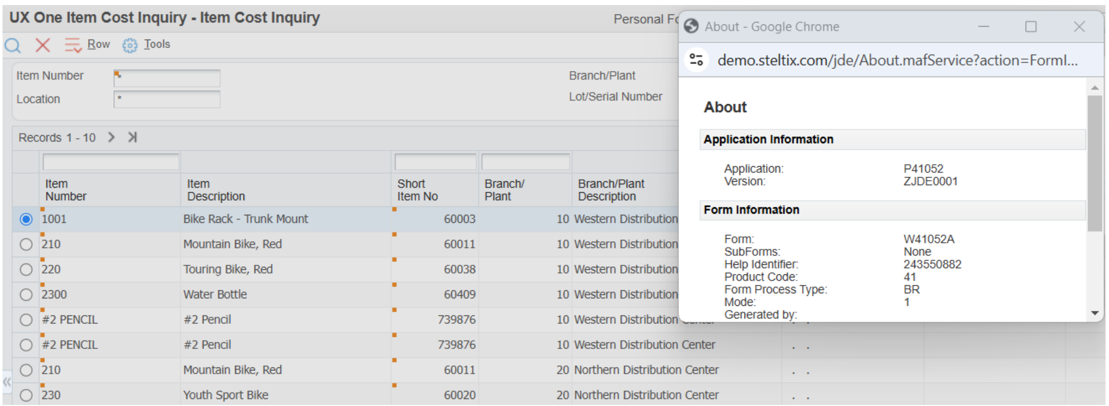
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41052

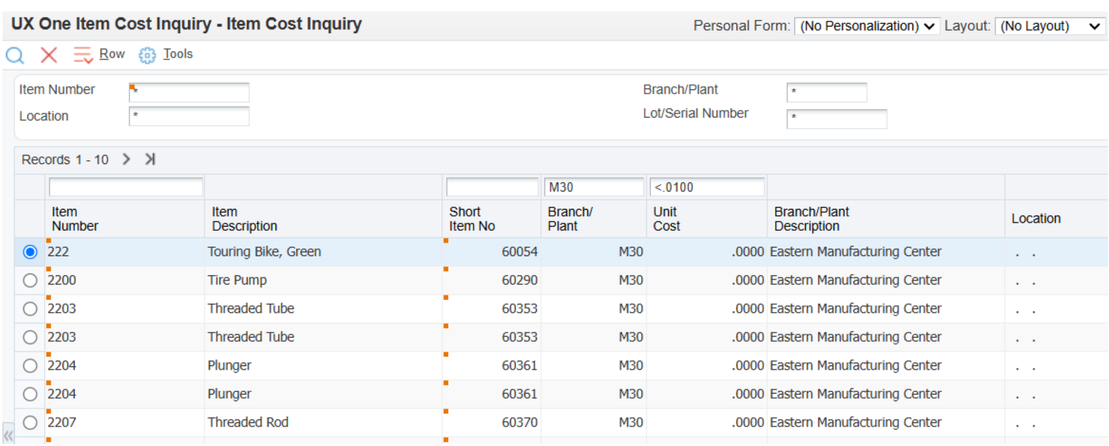
Step 1

Open UX one cost inquiry application



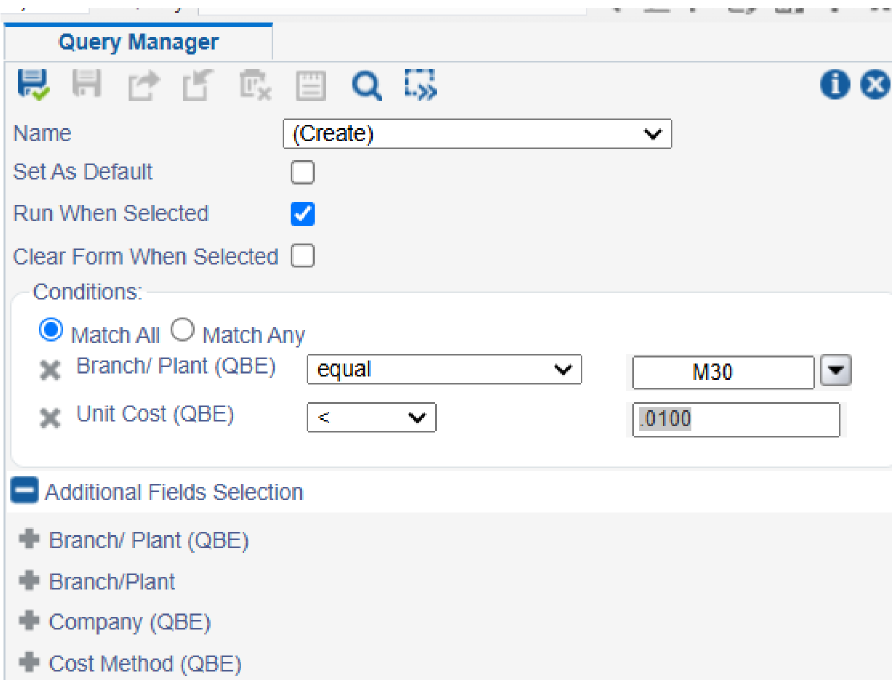
Step 2

Enter your branch and place <0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid.



Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a watchlist for this query, give the same name.

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This example can be expanded to find zero costs in other cost types like 02, 08, etc. Also like exception alert for costs >$10000, in a business environment where new products and costs are added on a daily basis. You want to catch the errors and exception well before transactions hit the GL.

Cost Ledger Surprises 08 vs 07 Alert

Business Requirement:

Companies typically use 08 cost method to load purchasing standards. When you roll up the product costs, JDE creates/updates the 07-cost method. You are not supposed to manually update the 07 costs in the application. That will have huge impact on WIP, inventory valuation, etc.

Some users could manually update certain 08 records but didn't communicate the cost accounting to re-roll the costs. You need a watchlist that will compare these costs based on your threshold $ values. You can then export this data into excel to do VLOOKUP on differences. Currently JDE does not have the feature to compare one JDE field to another JDE field to give 'not equal to' rules.

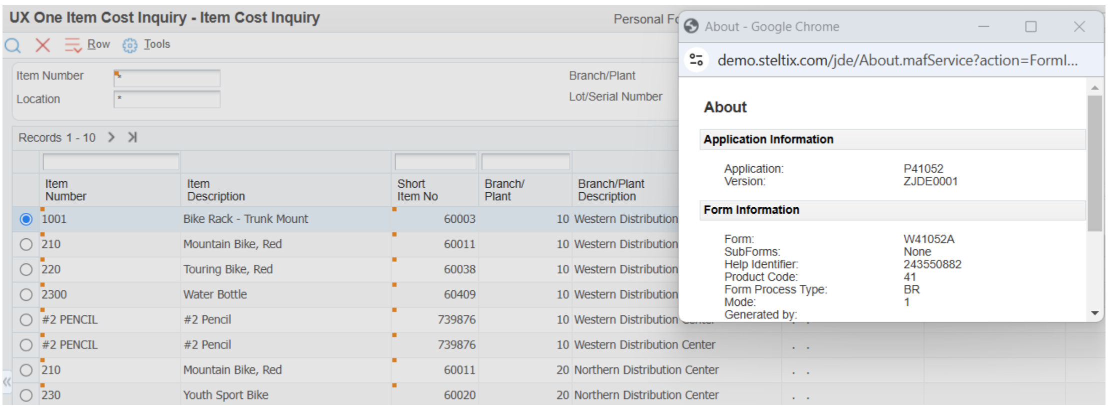
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41052

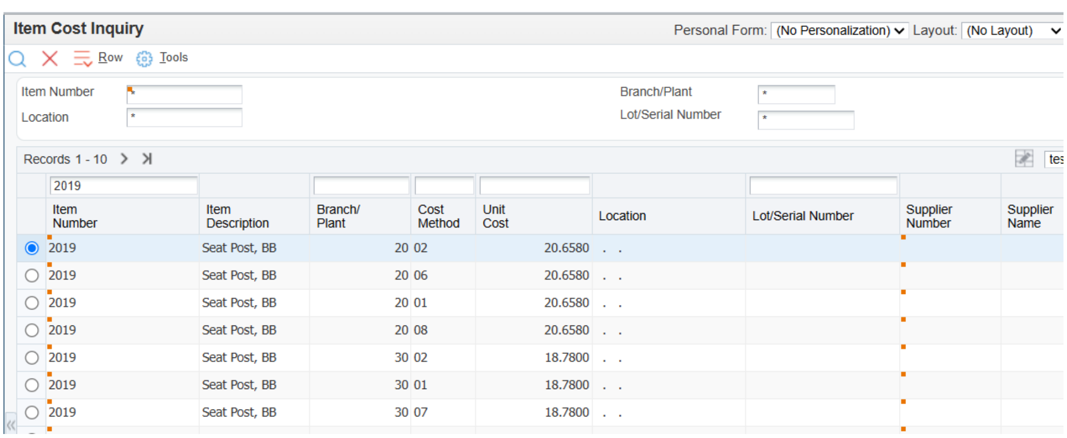
Step 1

Open UX one cost inquiry application



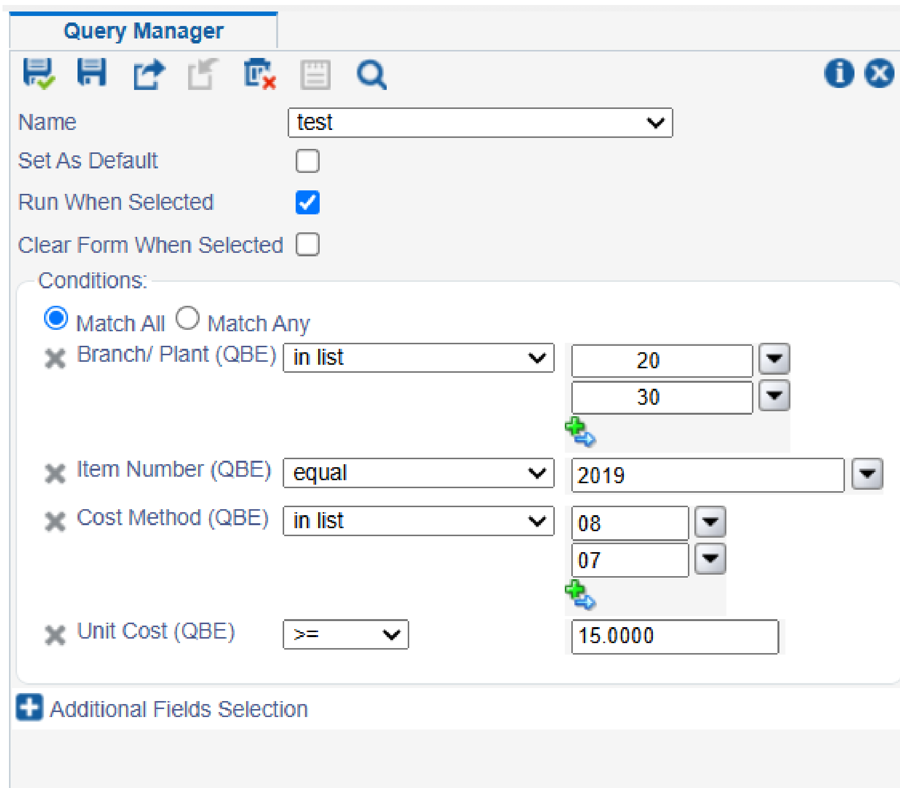
Step 2

Enter your branch and place >0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid, before making grid customization.



Step 3

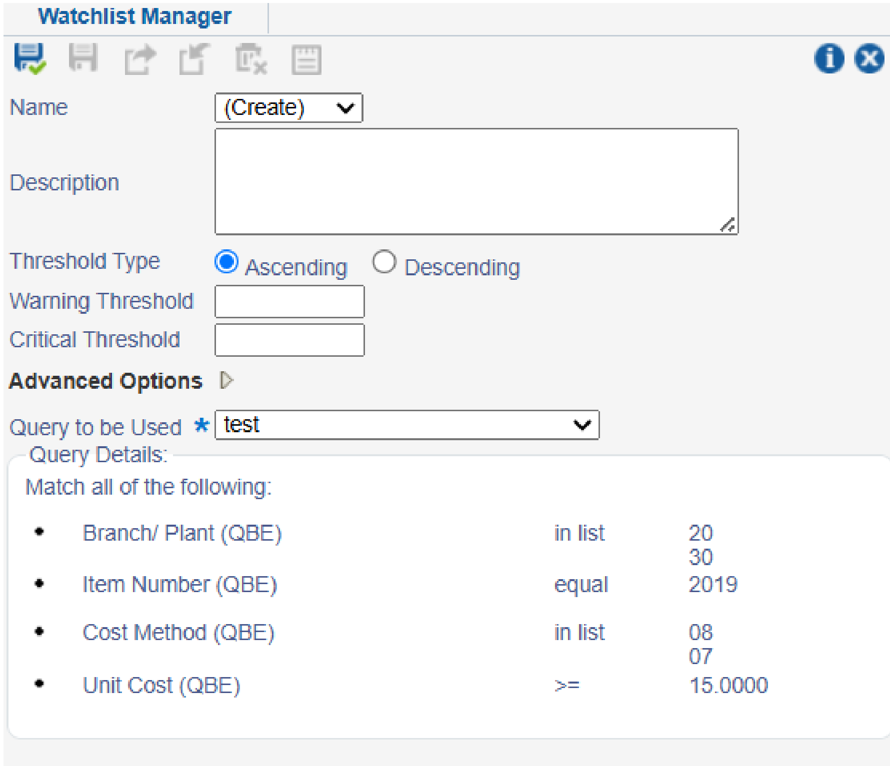
Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



$15 is an example, given the demo data considerations

Step 4

Create a watchlist for this query, give the same name



Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This example is helpful during quarterly or annual cost roll up across all products and branches. You do not want to purchase or IT to keep loading 08 costs, which you already started the cost rollup company-wide on that weekend.

Cost Ledger Surprises 02 vs 07 Alert

Business Requirement:

Companies typically use 08 cost method to load purchasing standards. When you roll up the product costs, JDE creates/updates the 07-cost method. You are not supposed to manually update the 07 costs in the application. That will have huge impact on WIP, inventory valuation, etc.

Some users could manually update certain 08 records but didn't communicate the cost accounting to re-roll the costs. You need a watchlist that will compare these costs based on your threshold $ values. You can then export this data into excel to do VLOOKUP on differences. Currently JDE does not have the feature to compare one JDE field to another JDE field to give 'not equal to' rules.

In cases of weighted average model (02 cost method) JDE updates the cost dynamically or on batch code as the receiving transactions or AP payments are made. If you are in a transition from 07 to 02, it is better to keep checking the data till the system is stable.

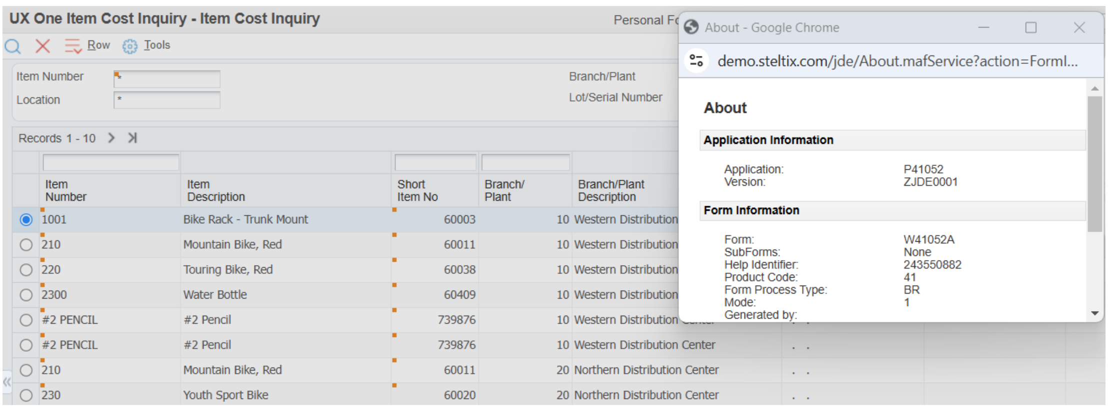
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41052

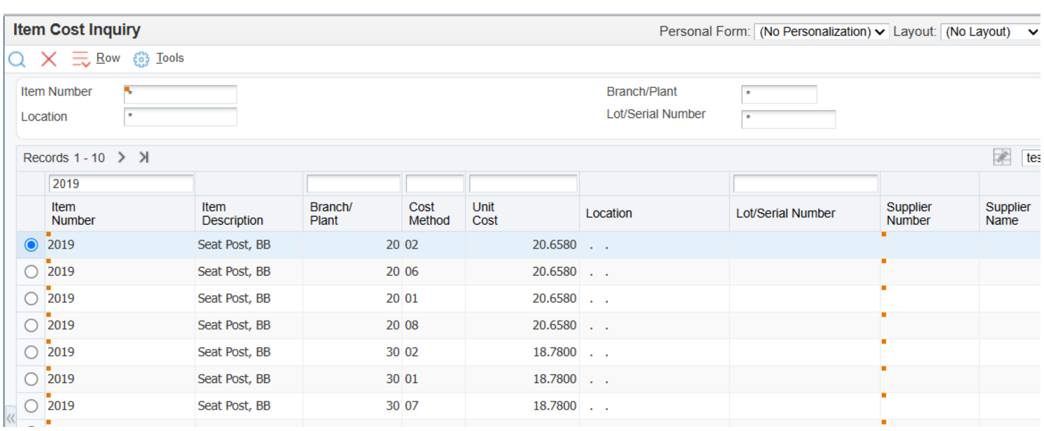
Step 1

Open UX one cost inquiry application



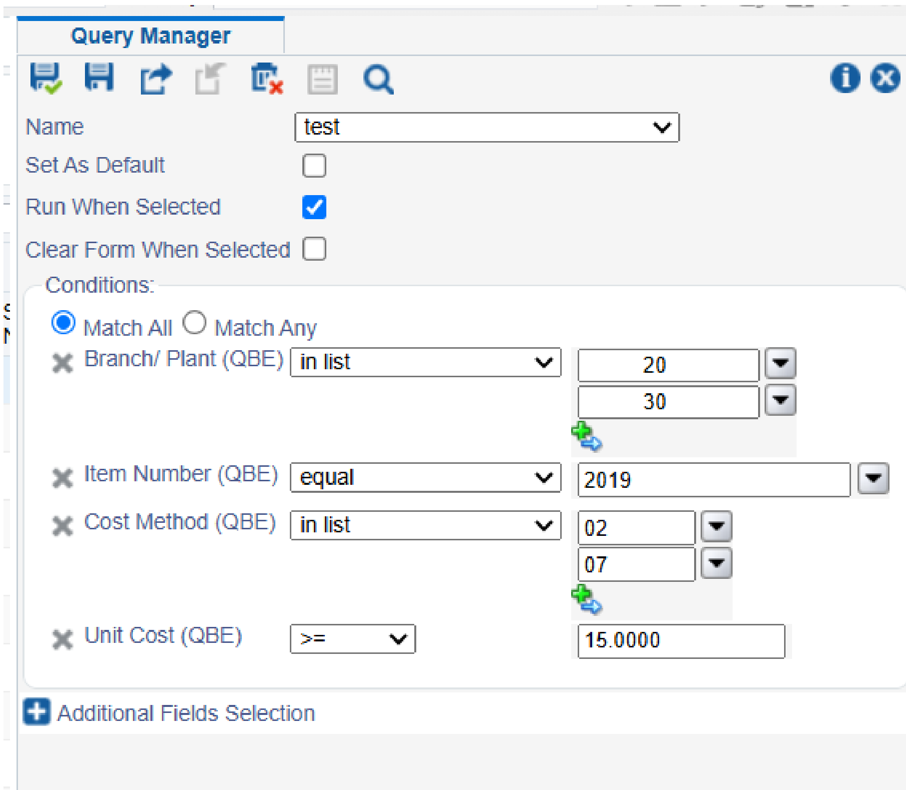
Step 2

Enter your branch and place >0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid.



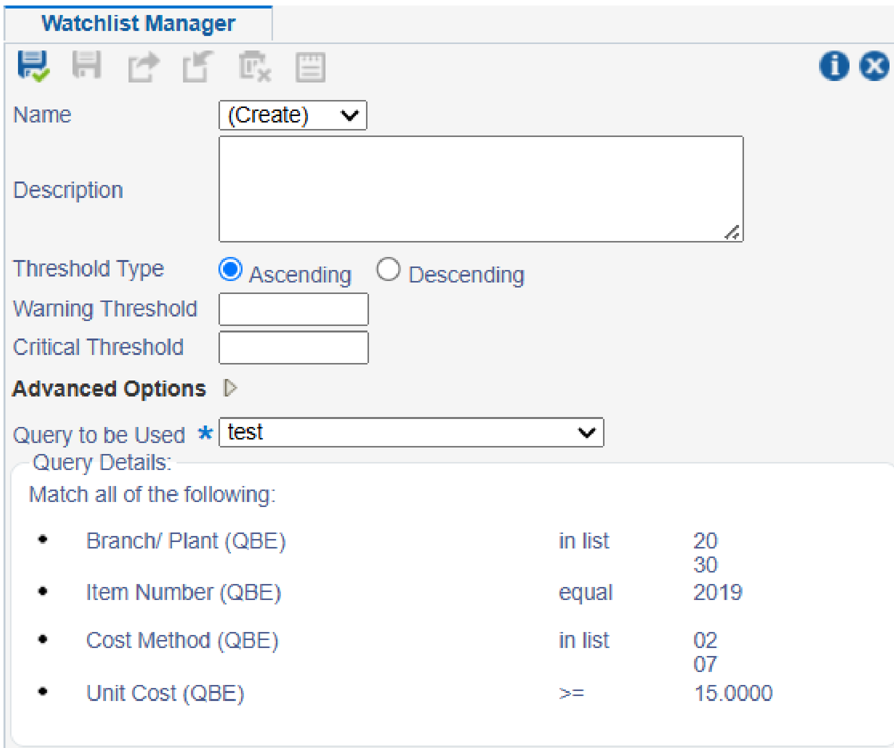
Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a watchlist for this query, give the same name



Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This example is helpful if you are doing batch weighted average updates and any accidental negative inventory quantity or dollar value impacted your cost method. An exception checks twice a year will help with better trust in the system and configurations

Cost Ledger Surprises YTD vs Last Year Alert

Business Requirement:

Companies do this exercise every annual fiscal close. Take the current 07 or 02 values and copy it to another cost method using Z files process or SQL updates. Example cost method naming could be 5A (for 2025 actuals). If you have done for many years you have the total cost pattern in the tables which could be analyzed for market trends and pricing policies

Probably, once in a quarter you want to see the cost progress this year in a standard cost or weighted average cost model. This inquiry helps to extract data based on your own data filters. There is no need to use data browser and/or ask for SQL extracts. You can export the data and do VLOOKUP for variations

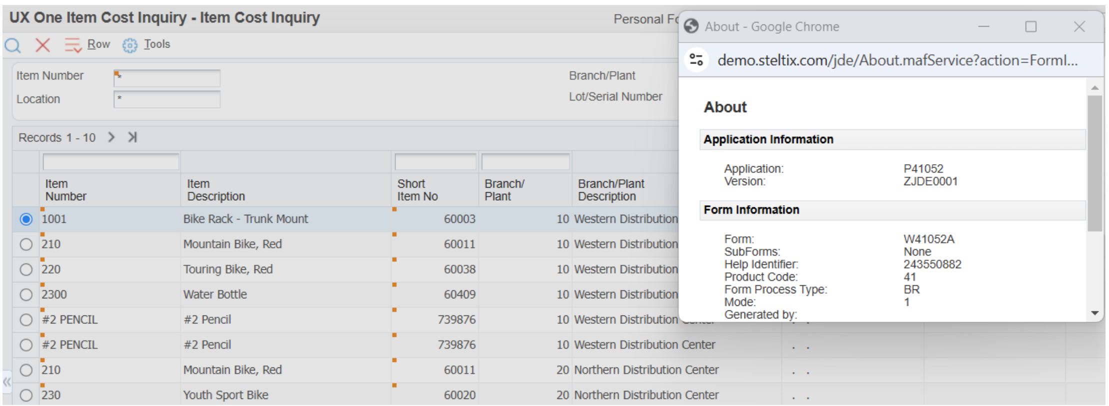
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41052

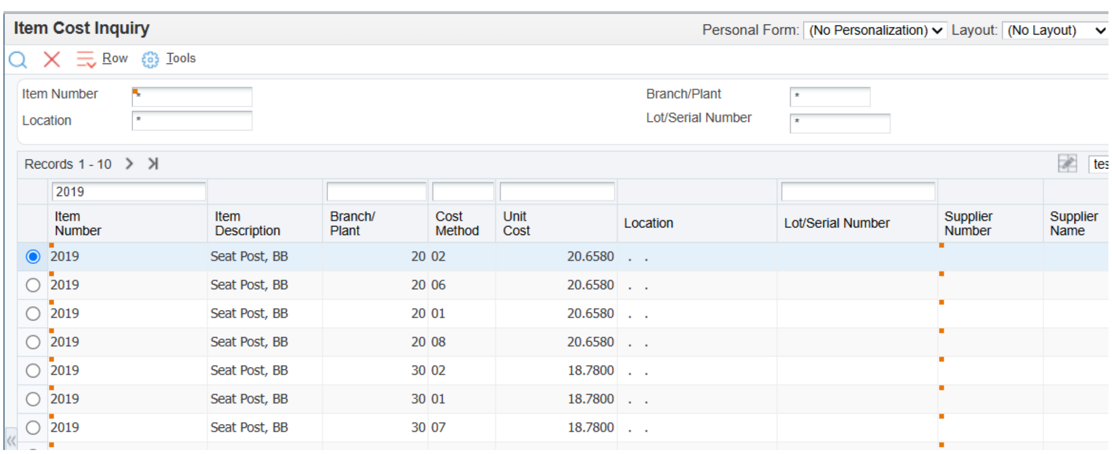
Step 1

Open UX one cost inquiry application



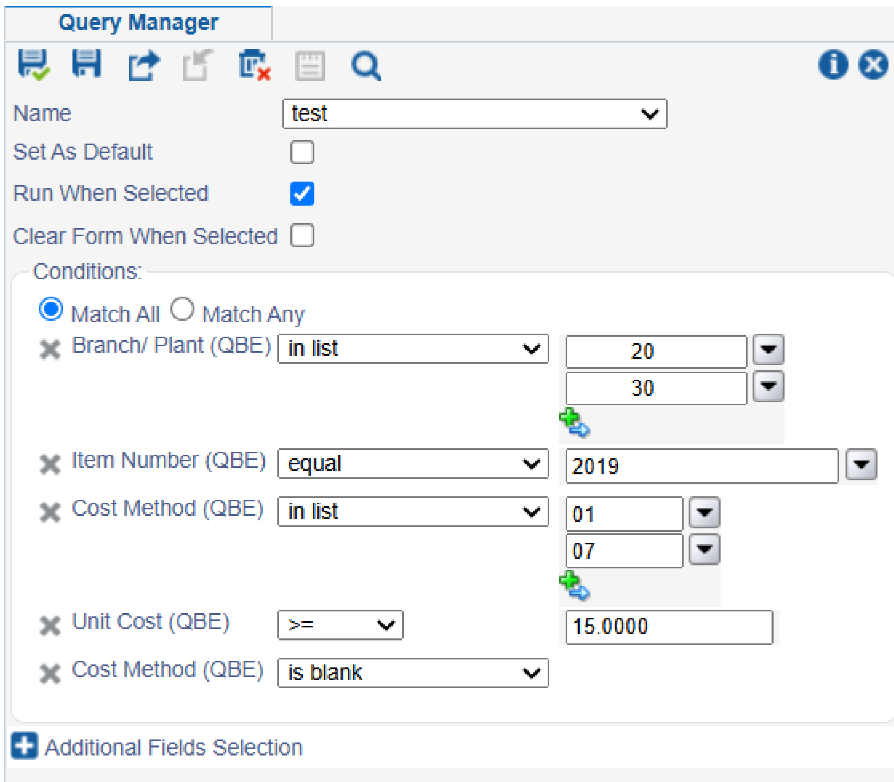
Step 2

Enter your branch and place >0.01 in unit cost field. Make grid customization to hide unwanted fields. Ensure you have selected show all columns grid.



Step 3

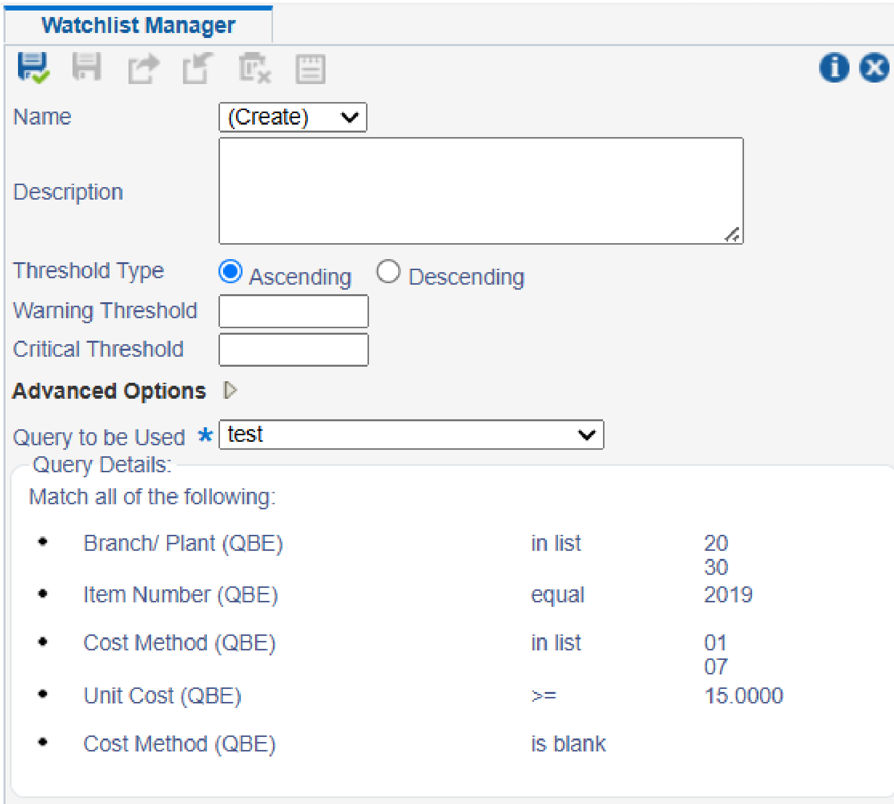
Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



In this example, 01 is treated as last year cost data. (demo system). In real life you give a cost method name like 4A, 5A etc. for 2024/2025. You can also use item category code instead of listing a few items

Step 4

Create a watchlist for this query, give the same name



Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This inquiry has many other fields like item category codes, ABC codes, etc. which could be used instead of listing your few products or components.

Zero Price Items Alert

Business Requirement:

You are in a fast-moving product manufacturing/selling environment. The products get designed and sales ordered entered quickly to get into the market. Marketing and sales have not yet provided the price list. Sales orders go into execution and zero invoices go to the customer! Checking discrepancy or zero prices are very important in those situations. Especially important if such price changes happen every quarter or more frequent within a year.

If you are in PDM group and/or in Costing group, you need to use this watchlist and get alerts promptly. This is very critical for short cycle time manufactured products in a high NPI (new product introductions) environment.

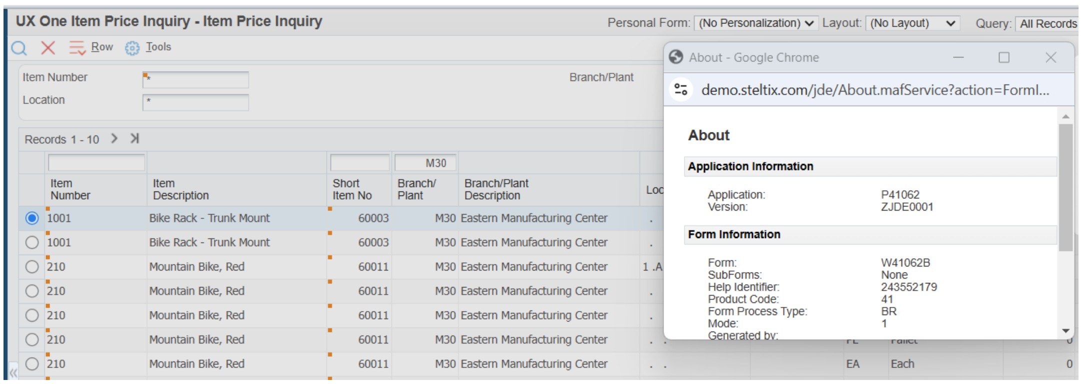
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P41062

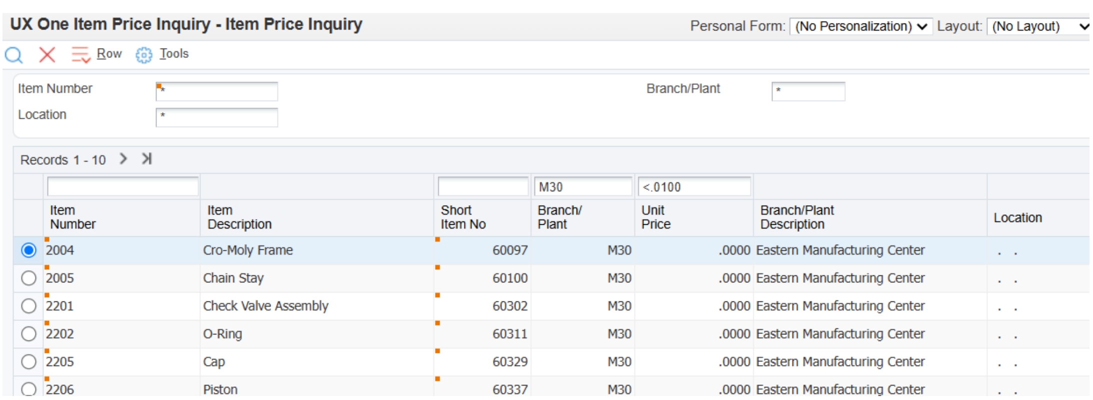
Step 1

Open UX one price inquiry application



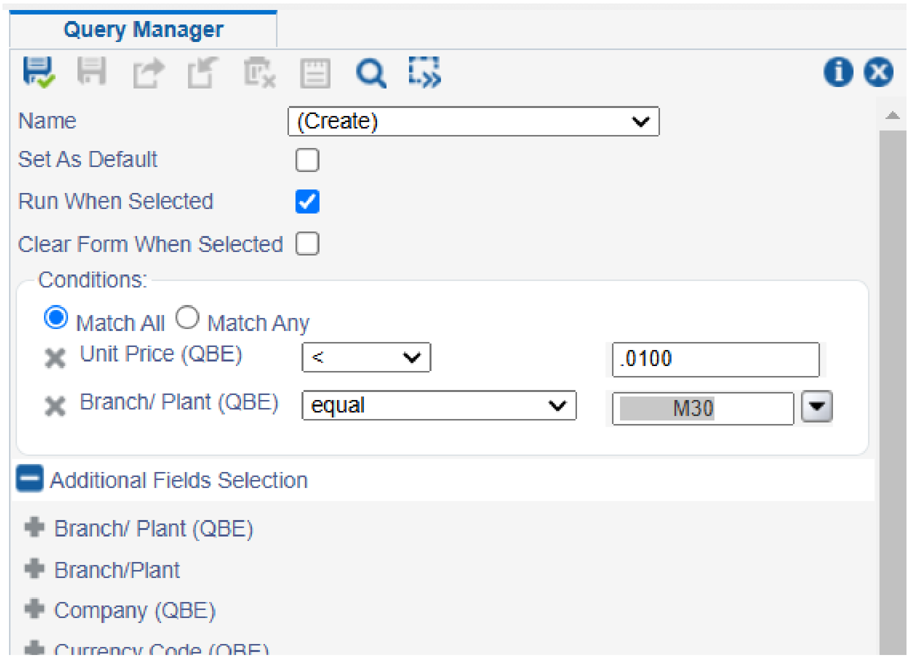
Step 2

Enter your branch and place >0.01 in unit price field. Make grid customization to hide unwanted fields.



Step 3

Build a query and select these two fields. If you have entered QBE previously it automatically populates that field. Save the query with a unique recognizable name.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This inquiry has many other fields like item category codes, ABC codes, etc. which could be used instead of listing your few products. As Pricing manager, you could have another watchlist for all products above $25000 (as an example) price value. If you could export that data before you reload the current prices, this will help us to quickly do data analysis to compare pricing patterns.

Blanket Order Usage Alert

Business Requirement:

Your organization uses blanket purchase orders extensively. The purchase order line releases happen in a stand-alone application and/or as a part of the MRP purchase order release application.

You need to know the material coverage periodically to decide on the review of your material budgets. Also you want to know proactively if any such blanket order is nearing full usage (price negotiation point) or never used to the full extent (again price negotiation point).

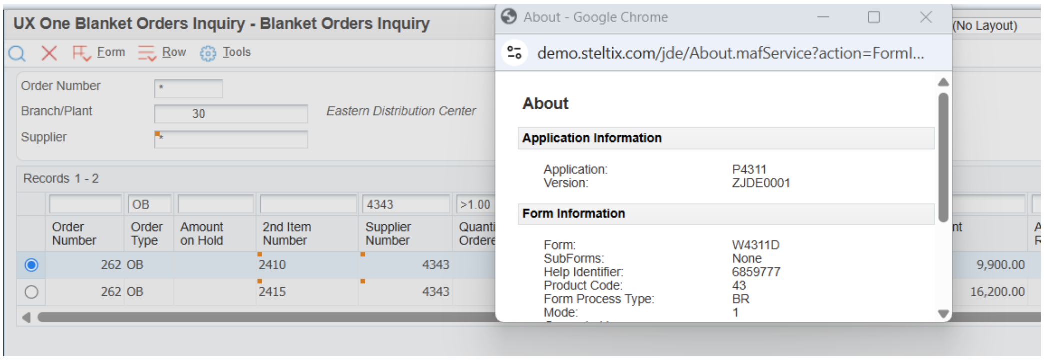
Technology used: Blanket order inquiry UxOne

Limitations: None. Please check security granted to right roles

Table/Application Used: P4311

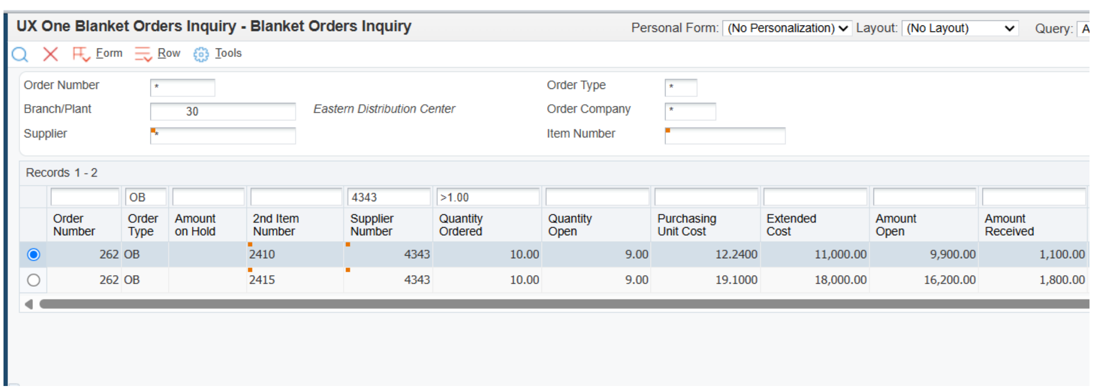
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

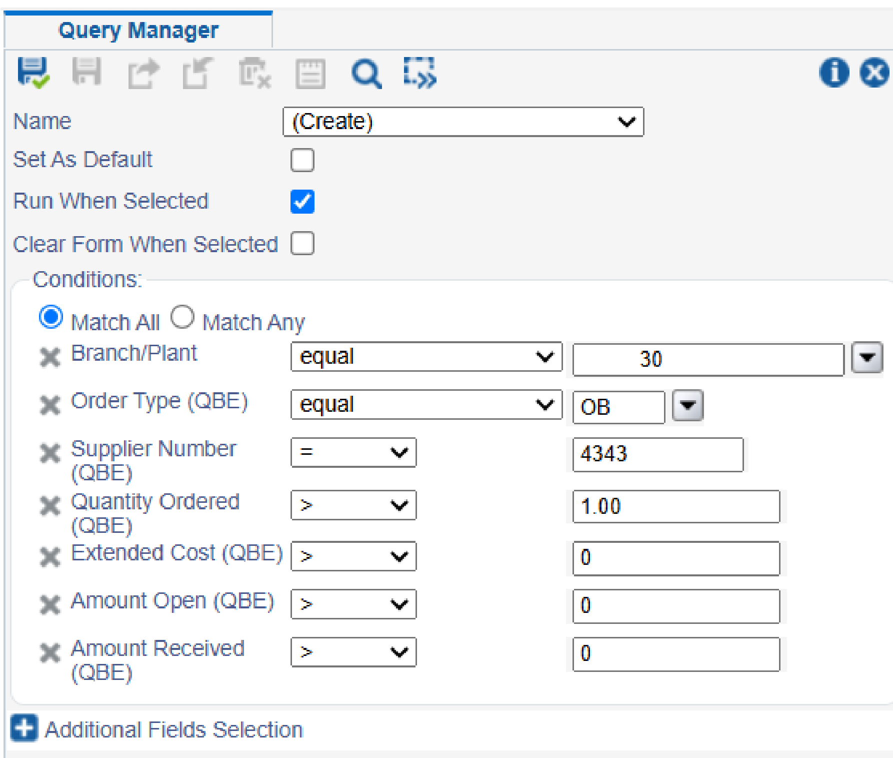
Customize the grid (example below), place some QBE values to get valid data points



Step 3

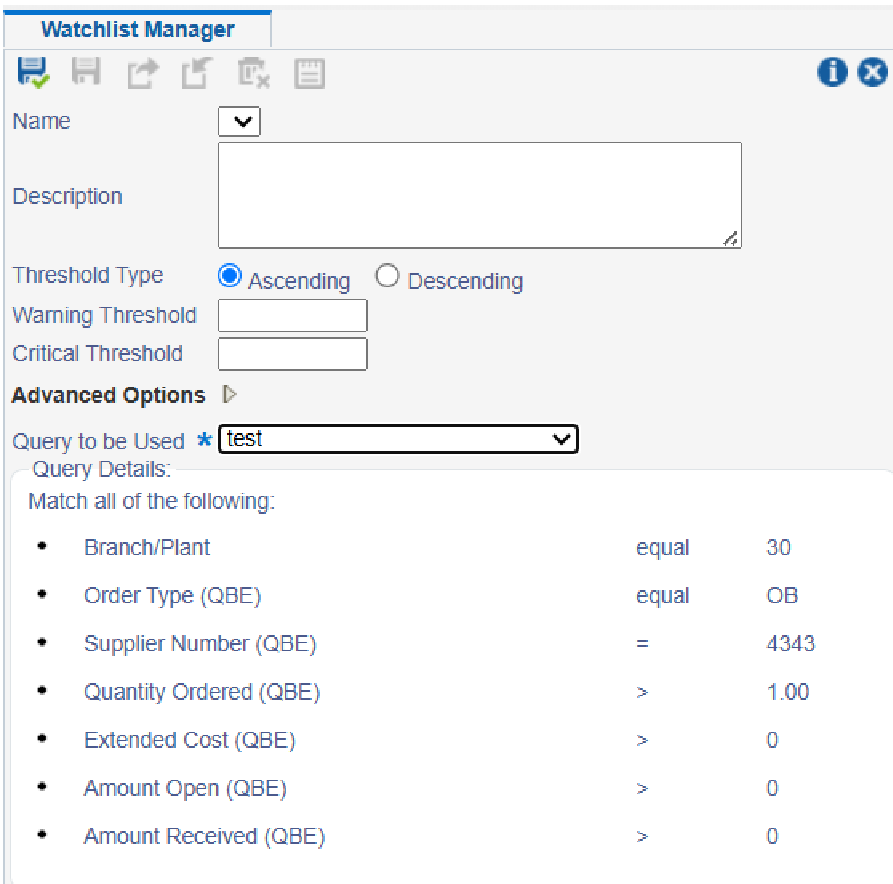
Create a new query. Use the right pane selections to start with.

Branch plant, order type, qty ordered, etc. Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: Currently watchlist queries do not have user-enabled calculations and/or compare one field value to another. You have to export the data and build your own excel VLOOKUP rules to get exceptions or blanket order usage data points.

Purchase Order Overdue Alert

Business Requirement:

One way of looking at purchase order overdue is from the MRP T messages. But using Ux One application is more powerful, especially if you are not using MRP functionality.

You can build your own query where no quantity has been received yet on the purchase orders and they are overdue. If some or partial quantity has been received then use PO delayed alert watchlist. Since partial quantity means a change in demand and/or problems at the supplier end. That requires a different approach to solving the problems!

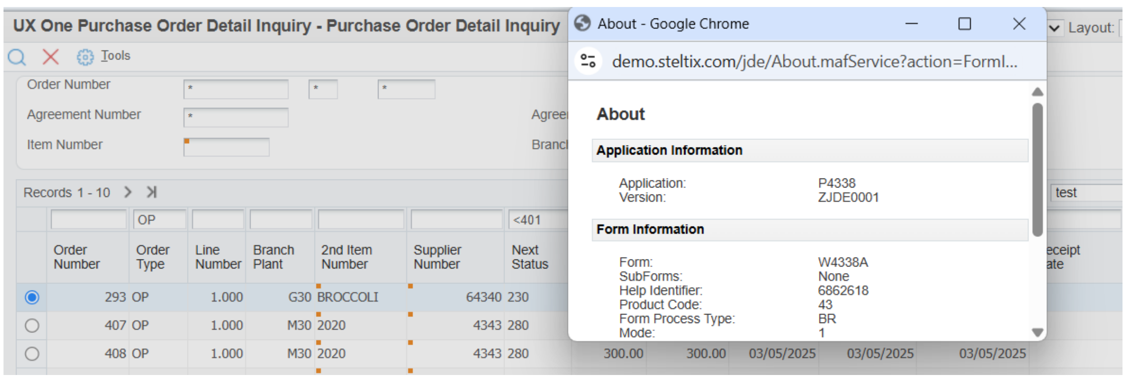
Technology used: Ux One Purchase order detail inquiry

Limitations: None. Please check security granted to right roles, these are UX One applications. Regular PO entry applicable may be possible if you add grid extension fields.

Table/Application Used: P4338

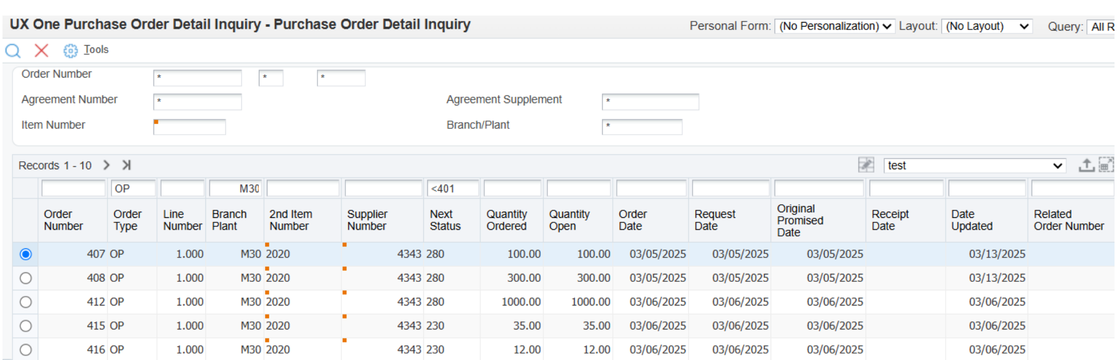
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

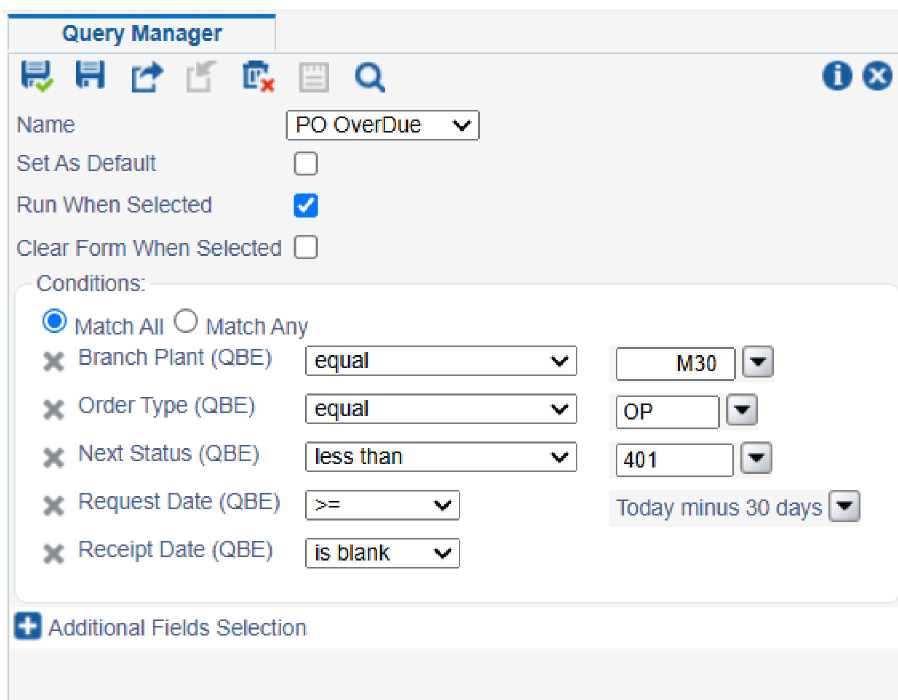
Customize the grid (example below), place some QBE values to get valid data points



Step 3

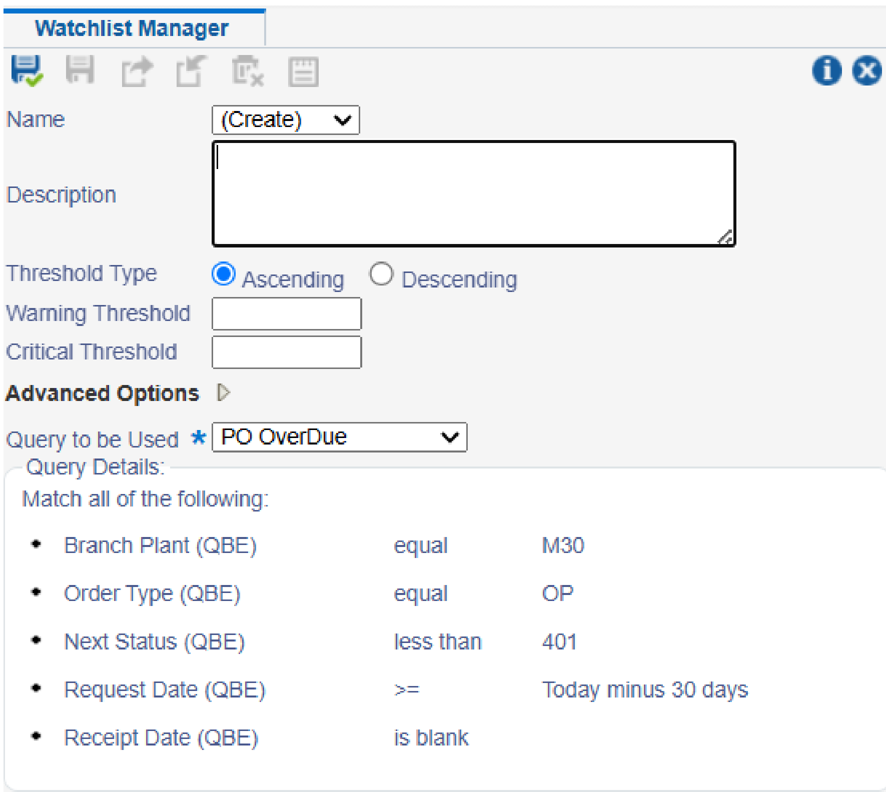
Create a new query. Use the right pane selections to start with.

Branch plant, order type, next status (<401 in this example), request date >today minus 30 days (as example). Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: Make variations to the request date filter if even a few days late means a lot in your business. You can add another field for vendor numbers to filter out consistently poor performing vendors. There are tools like supplier performance applications which show analysis on date, quantity, etc. for your scorecards.

Purchase Order delayed Alert

Business Requirement:

One way of looking at purchase order overdue is from the MRP T messages. But using Ux One application is more powerful, especially if you are not using MRP functionality.

You can build your own query where no quantity has been received yet on the purchase orders and they are overdue. If some or partial quantity has been received then use PO delayed alert watchlist. Since partial quantity means a change in demand and/or problems at the supplier end. That requires a different approach to solving the problems!

Technology used: Ux One Purchase order detail inquiry

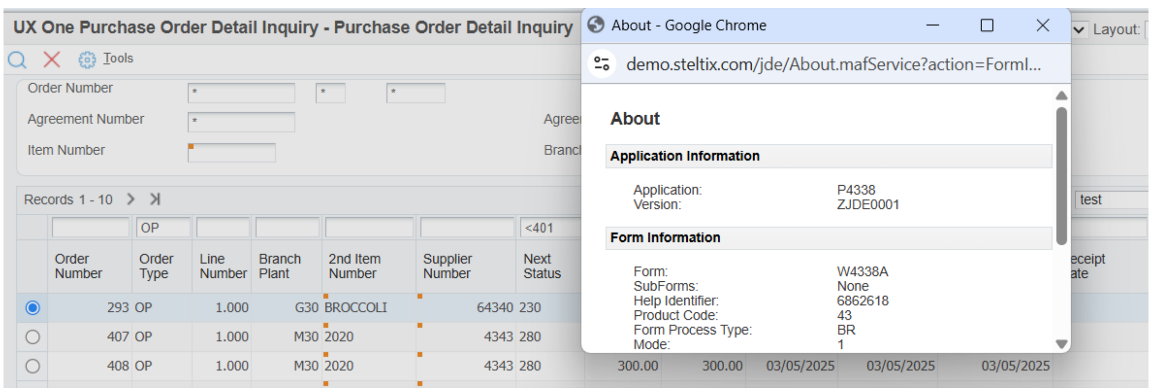
Limitations: None. Please check security granted to right roles, these are UX One applications. Regular PO entry applicable may be possible if you add grid extension fields.

Limitations: None. Please check security granted to right roles

Table/Application Used: P4338

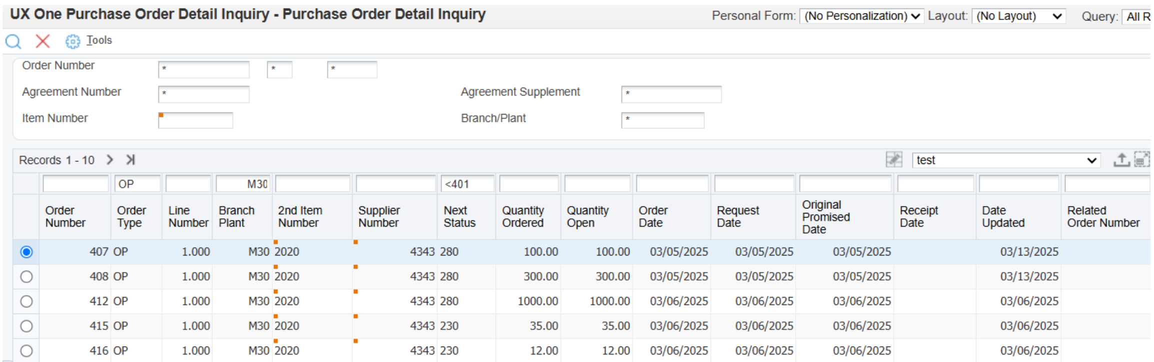
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

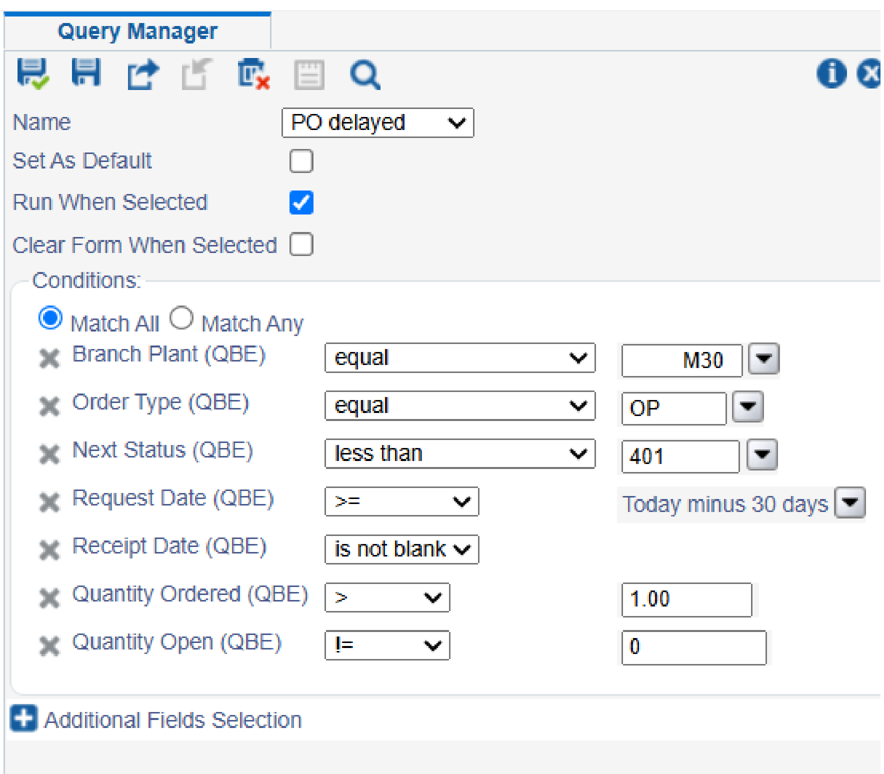
Customize the grid (example below), place some QBE values to get valid data points



Step 3

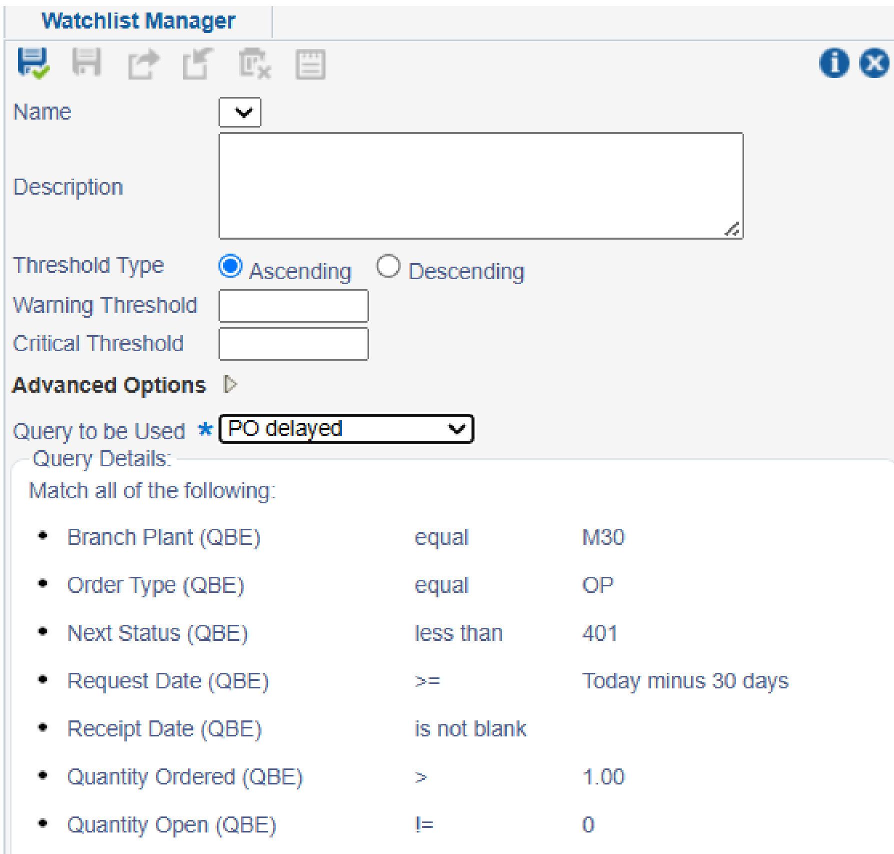
Create a new query. Use the right pane selections to start with.

Branch plant, order type, next status (<401 in this example), request date > today minus 30 days (as example). Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: Make variations to the request date filter if even a few days late means a lot in your business. You can add another field for vendor numbers to filter out consistently poor performing vendors. There are tools like supplier performance applications which show analysis on date, quantity, etc. for your scorecards.

Purchase Order Not Closed Age Analysis Alert

Business Requirement:

One way of looking at purchase order overdue is from the MRP T messages. But using Ux One application is more powerful, especially if you are not using MRP functionality.

Many times, the purchase orders have residual quantities left especially if you are in two or more decimals PO quantity environment. Rounding off may result in fractional quantity left open. MRP may show as past due messages with a fractional quantity. Buyers need to close those order lines as a part of housekeeping exercise. Or receiving department need to receive them as 'receive & close' option. But this communication is not that straight forward since sometime you may want to re-use the same purchase order later.

Technology used: Ux One Purchase order detail inquiry

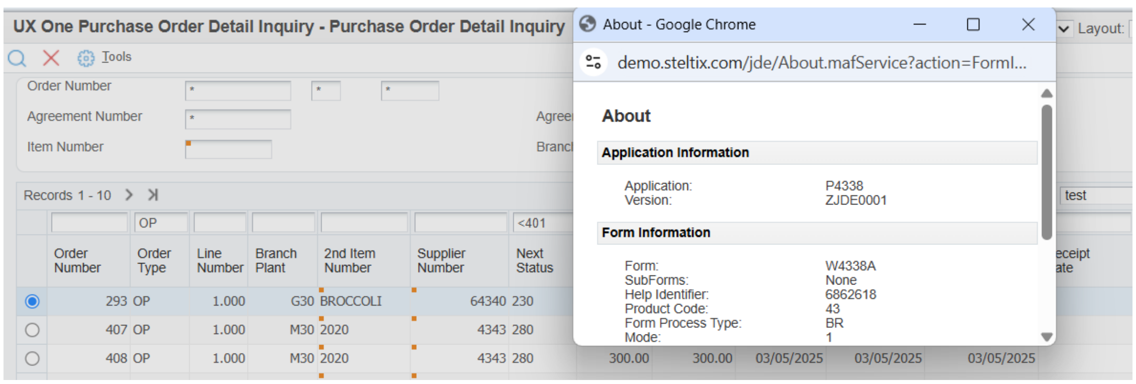
Limitations: None. Please check security granted to right roles, these are UX One applications. Regular PO entry applicable may be possible if you add grid extension fields.

Limitations: None. Please check security granted to right roles

Table/Application Used: P4338

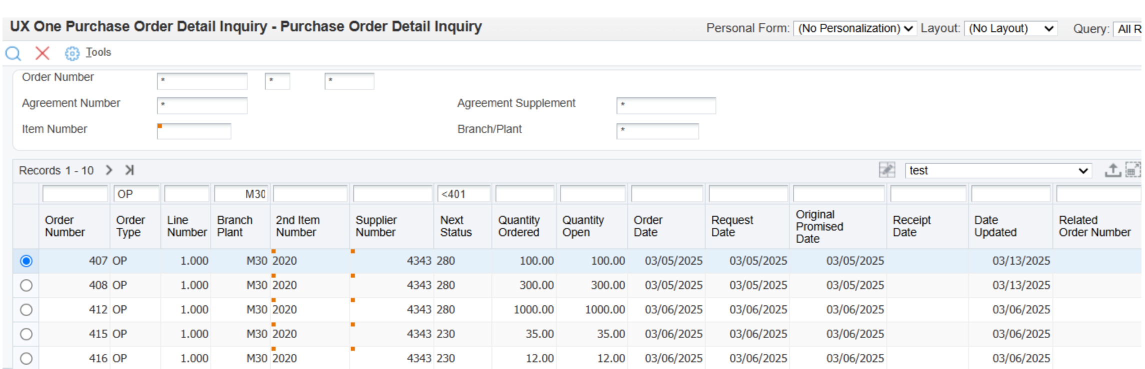
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

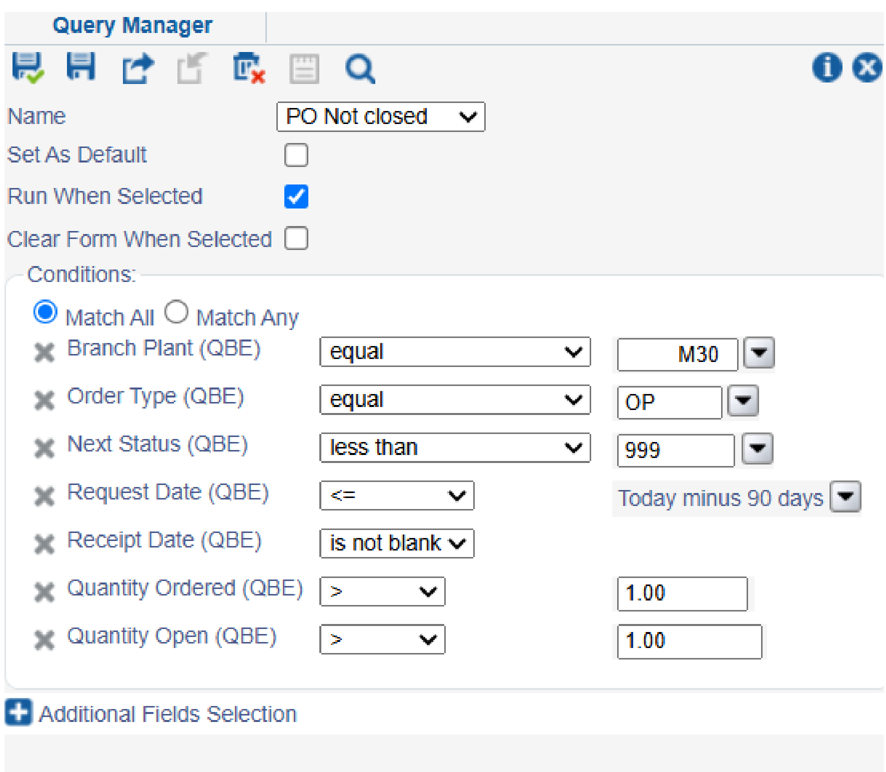
Customize the grid (example below), place some QBE values to get valid data points



Step 3

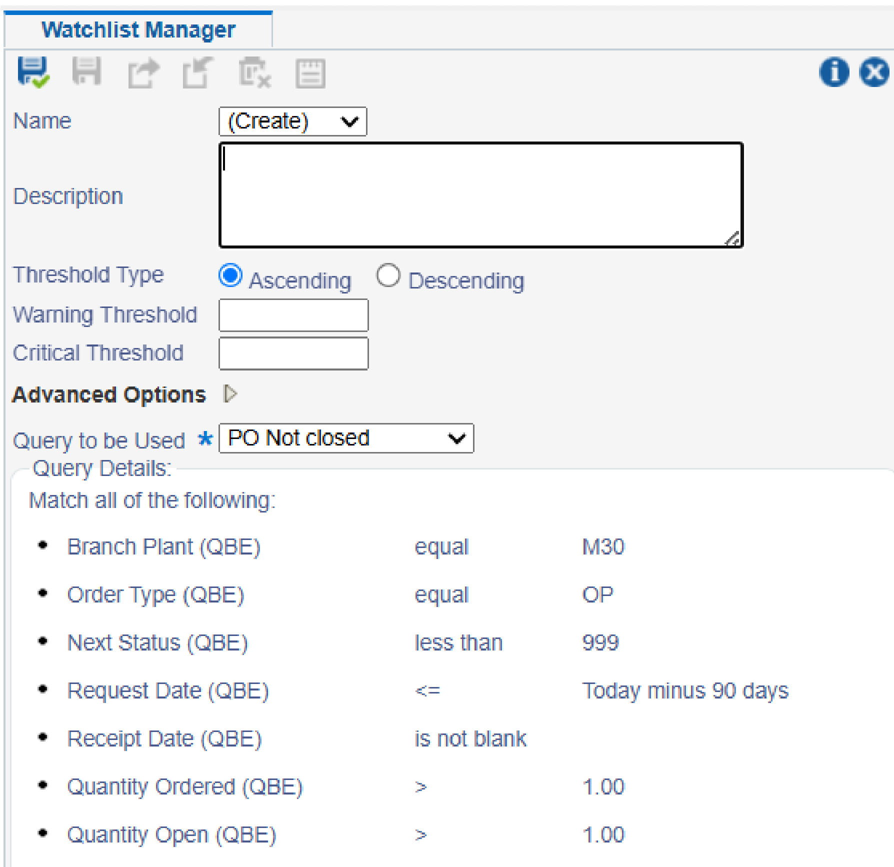
Create a new query. Use the right pane selections to start with.

Branch plant, order type, next status (<999 in this example), request date < today minus 90 days (as example). Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: You can fine-tune the above query with qty open > 0.01 in a decimal place environment. Use request date or order date as applicable. Even the next status could be above 400. The idea is to close purchase orders as quickly as they are received. Otherwise, user error could end up receiving more on the past purchase orders triggering tolerance alerts and price discrepancies. That will pose more discussions with suppliers and your AP team later!

Supplier $ performance, discounts Alert

Business Requirement:

As a purchasing manager or lead you need to know how your key suppliers perform financially. How much have they invoiced in that year and how much have they gained in price discount (if you are using pricing groups and discount through purchase agreements). This data will help in purchase price negotiations and/or redefining the price bundles/scales.

Technology used: One view supplier ledger inquiry

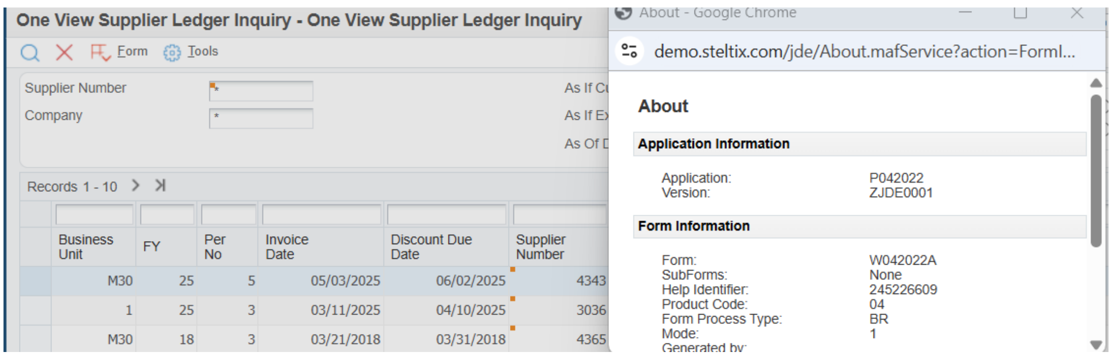
Limitations: None. Please check security granted to right roles, these are one view inquiry applications. 04 means AP, but you are only looking for a vendor performance dollar wise in a year and the discounts availed. AP team lead can run this inquiry but a watchlist for purchasing will help immensely.

Limitations: None. Please check security granted to right roles

Table/Application Used: P042022

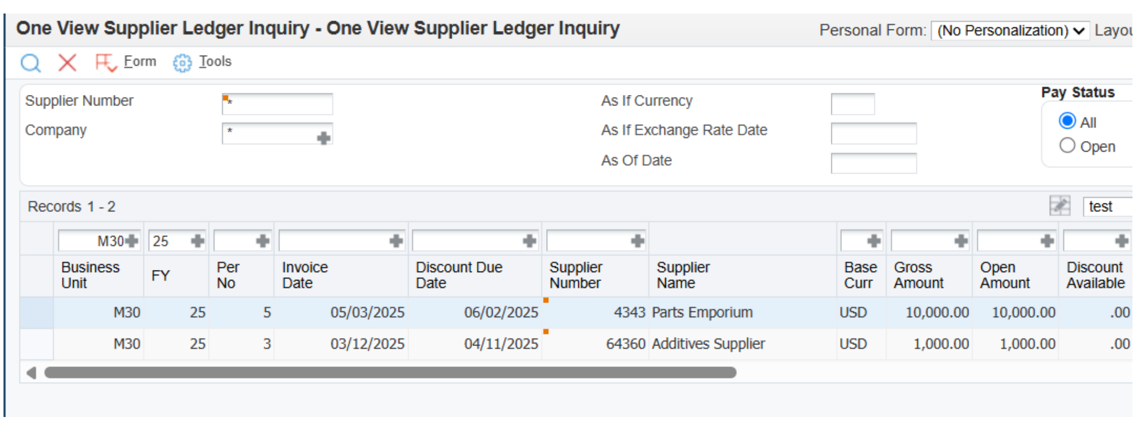
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

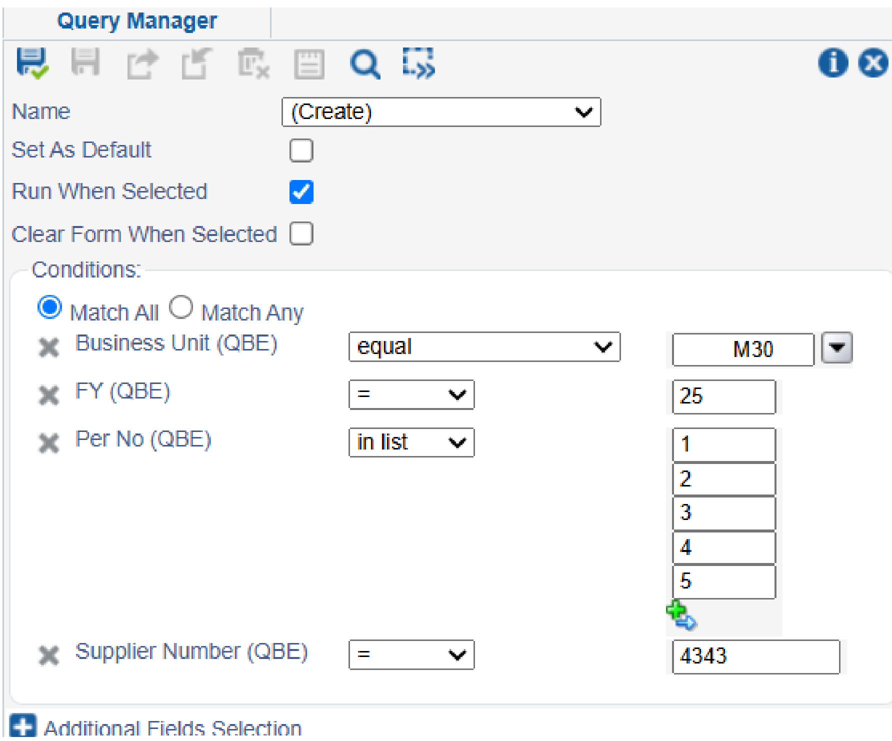
Customize the grid (example below), place some QBE values to get valid data points



Step 3

Create a new query. Use the right pane selections to start with.

Branch plant, fiscal year, period (enter 1 to 12 in the list), supplier number (4343 in this example), etc. You may enter future years in the FY field to avoid making changes every year to this watchlist. Same with multiple vendors, whom you think are important to your business. Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

Customer $ performance, Aging Alert

Business Requirement:

Like supplier side, you as a customer service manager or power user or lead need to know how your key customers perform financially. How much business do they have in that year and how much they have gained in price discount (if you are using pricing groups and discount through customer agreements). This data will help with sale price negotiations and/or re-defining the price bundles/scales. This inquiry comes with the aging analysis as well.

Technology used: One view customer ledger inquiry

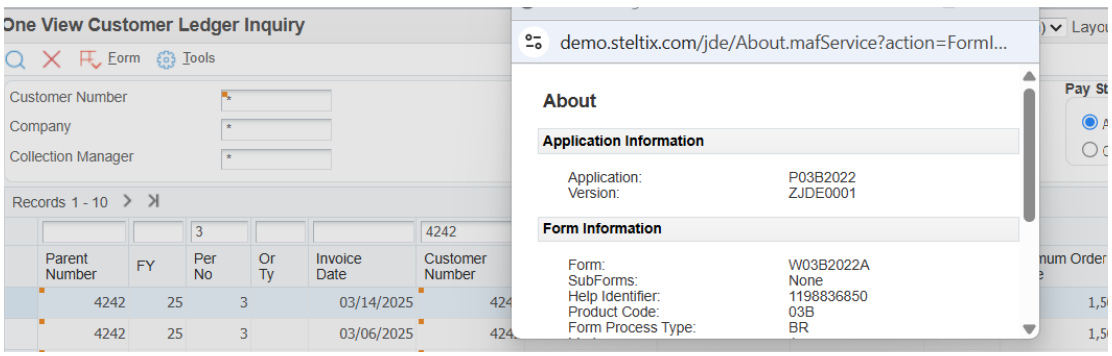
Limitations: None. Please check security granted to right roles, these are one view inquiry applications. 03 means AR, but you are only looking vendor's performance dollar wise in a year and the discounts availed. AP team lead can run this inquiry but a watchlist for purchasing will help immensely.

Limitations: None. Please check security granted to right roles

Table/Application Used: P03B2022

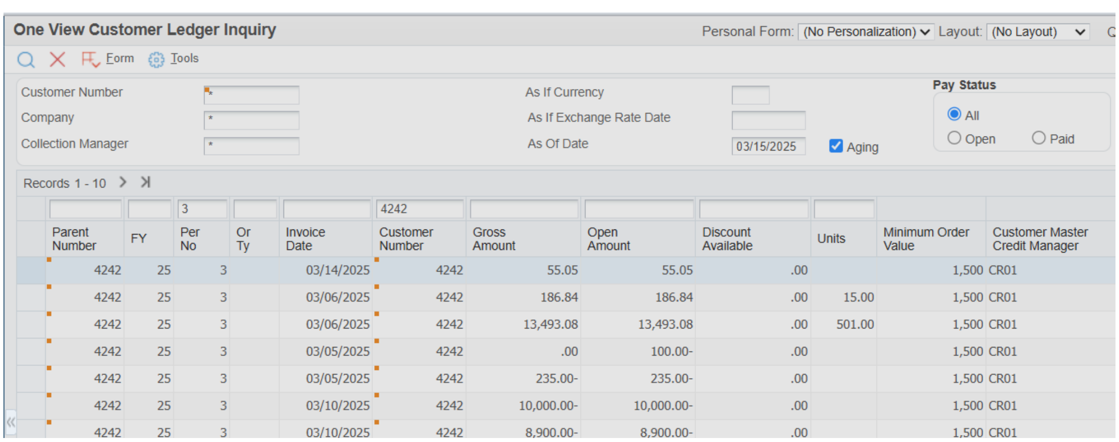
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points



test

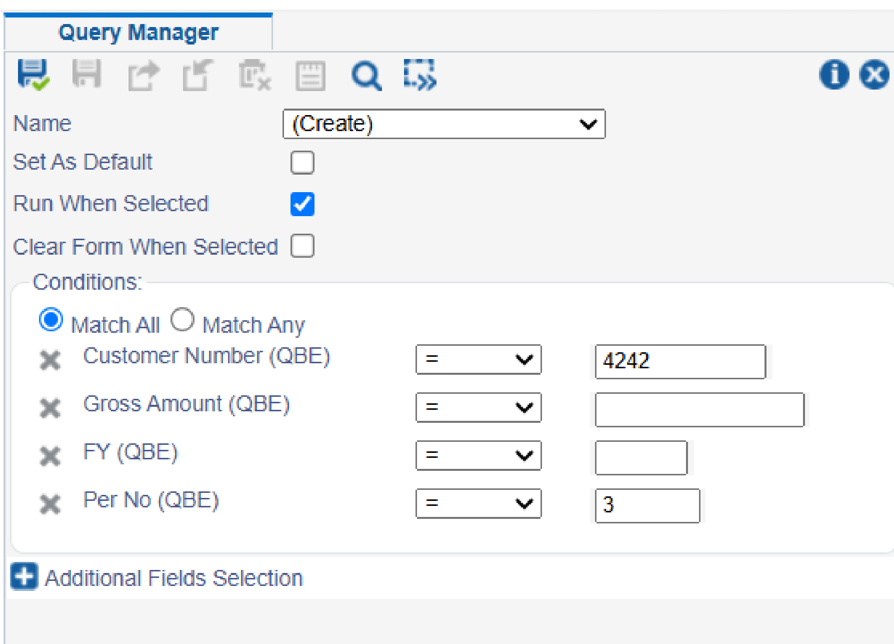
Order Number	As Of Date	Future Due	Current Amount	Aging Category1	Aging Category2	Aging Category3	Aging Category4	Aging Category5	Aging Category6	Aging Category7
	03/15/2025	.00	.00	55.05	.00	.00	.00	.00	.00	
	03/15/2025	.00	186.84	.00	.00	.00	.00	.00	.00	
	03/15/2025	.00	13,493.08	.00	.00	.00	.00	.00	.00	
	03/15/2025	.00	.00	100.00-	.00	.00	.00	.00	.00	
	03/15/2025	.00	.00	235.00-	.00	.00	.00	.00	.00	
	03/15/2025	.00	.00	10,000.00-	.00	.00	.00	.00	.00	
	03/15/2025	.00	.00	8,900.00-	.00	.00	.00	.00	.00	

Step 3

Create a new query. Use the right pane selections to start with.

Some easy filters are shown below. Please expand based on your business needs.

Use list in the FY and Period number, to enter multiple data points.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

Re-Order Point Alert

Business Requirement:

Outside MRP, JDE has the PO Generator. If the item branch planning values are not set to MRP but with re-order quantity and re-order levels, the system can consolidate and generate purchase orders for those items. This application gives basic inquiry view on the list of items against a vendor ready for purchase order generation. Buyers need not use this inquiry every day but use the watchlist if their vendor/item has come into reorder point level. PO Generator has limitations for one supplier field, but you can use it for reorder point item and/or all items pertaining to the supplier.

Technology used: PO Generator

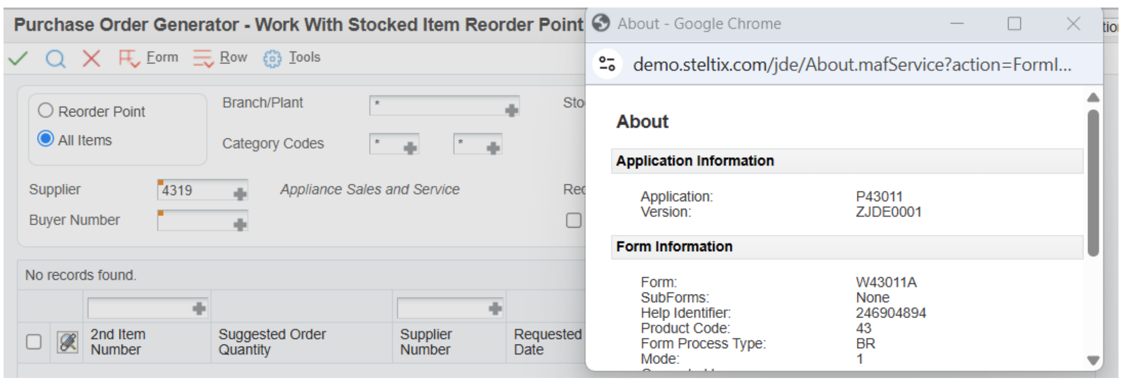
Limitations: None. This tool is used for non-MRP items. Reorder point levels and quantity need to be defined in item branch records. Order policy code should not be MRP.

Limitations: None. Please check security granted to right roles

Table/Application Used: P43011

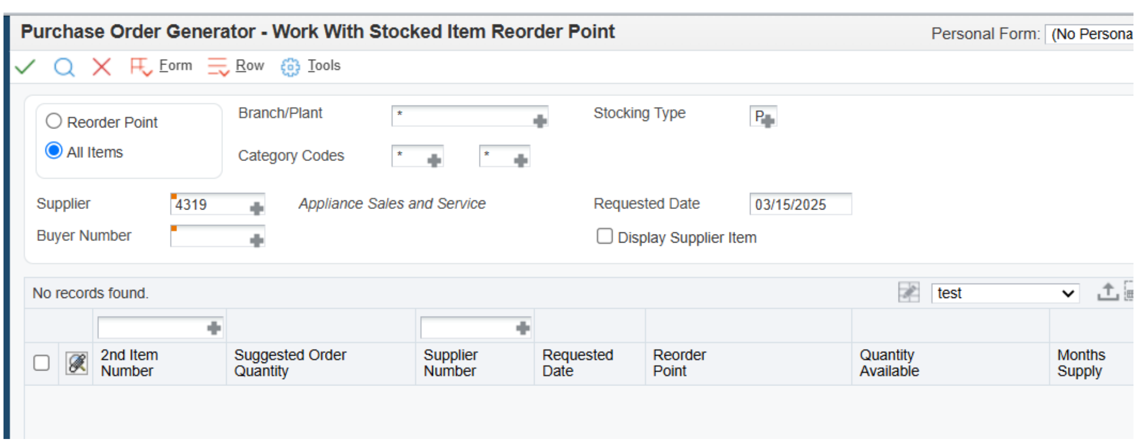
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

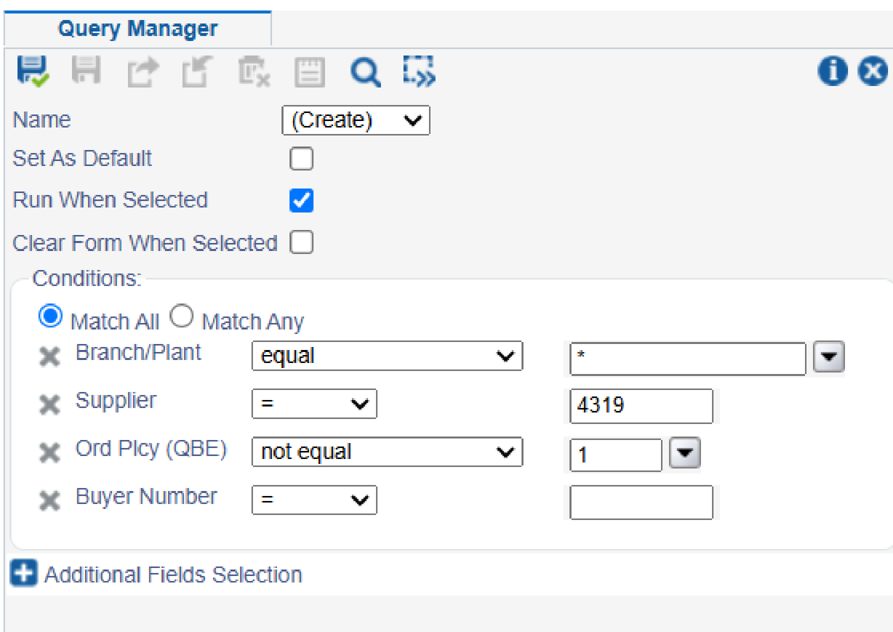
Customize the grid (example below), place some QBE values to get valid data points. You may need grid extension to get additional fields



Step 3

Create a new query. Use the right pane selections to start with.

Some easy filters are shown below. Please expand based on your business needs. Do not use the buyer number if the buyers change all the time. Or use generic buyer numbers for product groupings, so that it will not distract personnel changes.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

Purchase Approvals pending Alert

Business Requirement:

In a multi-level purchase order approval process system, originator or buyers start the approval process. It goes to department head, division head and then to other senior level executives. The system sends email notification to senior level executives and there are also mobile approval tools.

If there are approval delays, the end user or power user needs to know where the approval is struck. This watch list helps in doing the aging analysis.

Technology used: Orders Awaiting Approval

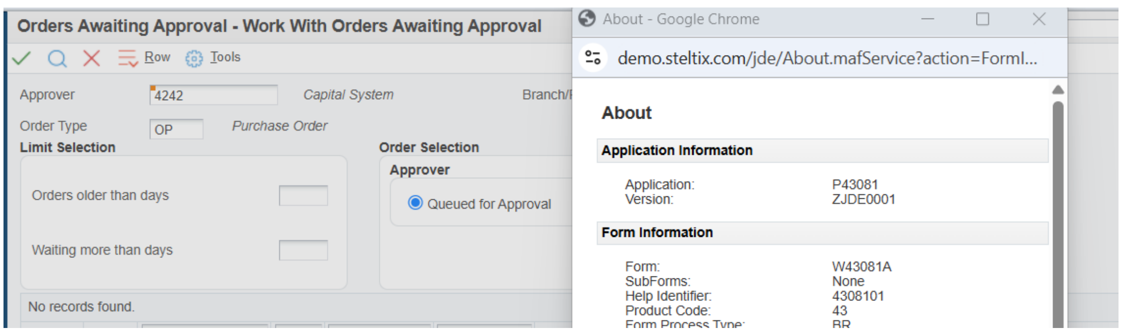
Limitations: None. Please check security granted to right roles, these are inquiry application and not exactly approval application

Limitations: None. Please check security granted to right roles

Table/Application Used: P43081

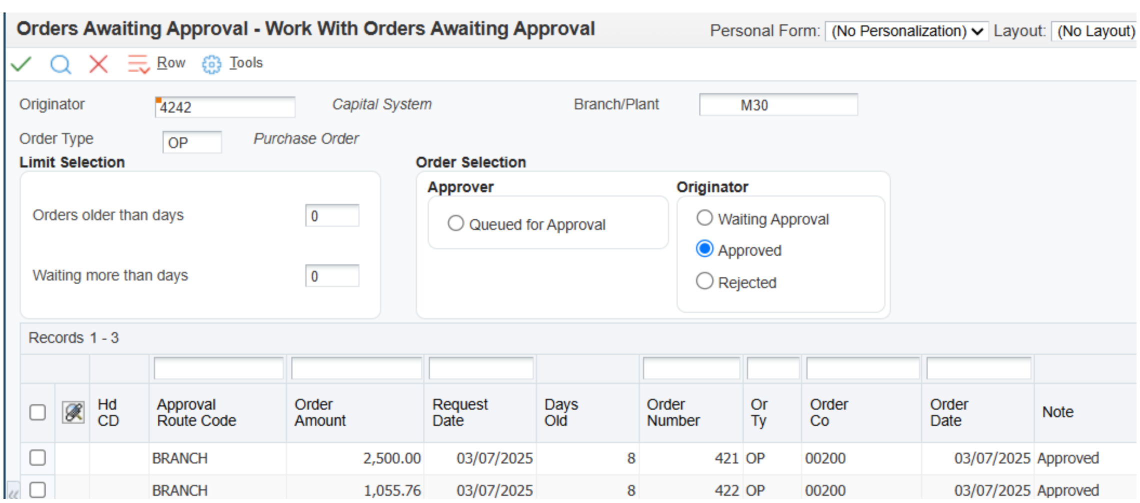
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

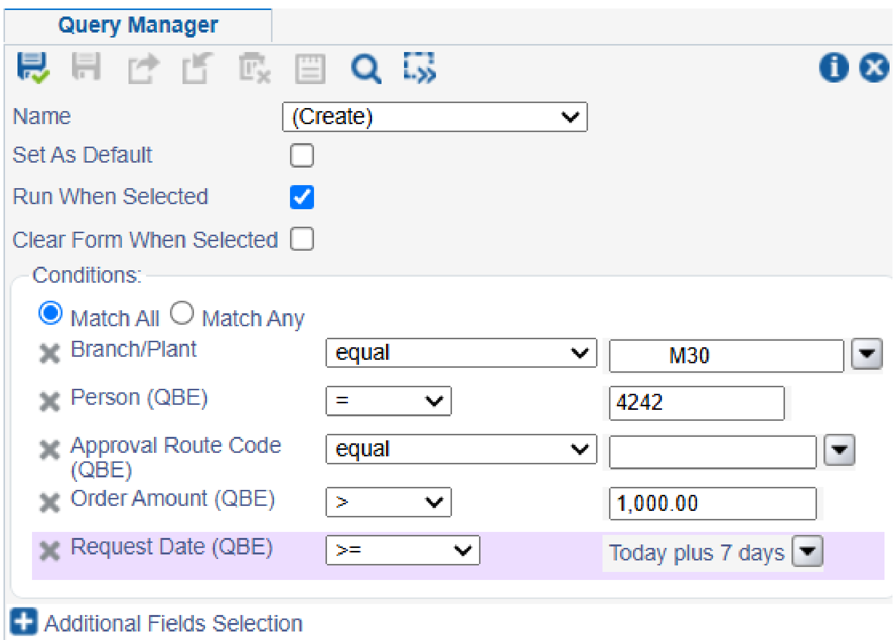
Customize the grid (example below), place some QBE values to get valid data points



Step 3

Create a new query. Use the right pane selections to start with.

Some easy filters are shown below. Please expand based on your business needs. Use list in the approval person and route codes, to enter multiple data points. Dollar threshold value will help in prioritizing the approval urgency.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

Item Usage Trace Inquiry Alert

Business Requirement:

Most often asked question in the management review and/or S&OP meetings: how are we covered on certain key fast-moving products and based on the past usage per month? You can run reports or come prepared with the questions. However there is a real-time one view inquiry available to get you an alert and you can modify to suit your products, supplier, etc. This view consolidates the data per month which is very useful. And shows what is the current situation in terms of soft/hard commitments.

Technology used: One view Item Usage Trace inquiry

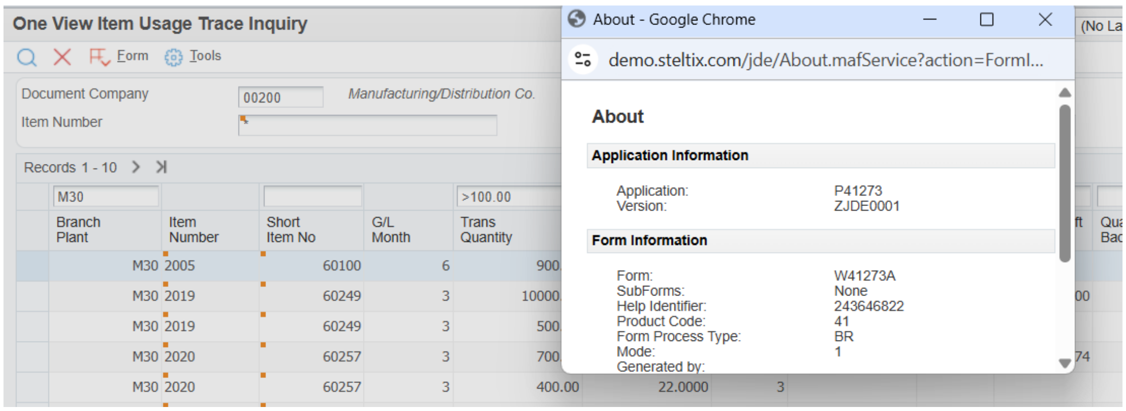
Limitations: None. Please check security granted to right roles, these are one view inquiry applications.

Limitations: None. Please check security granted to right roles

Table/Application Used: P41273

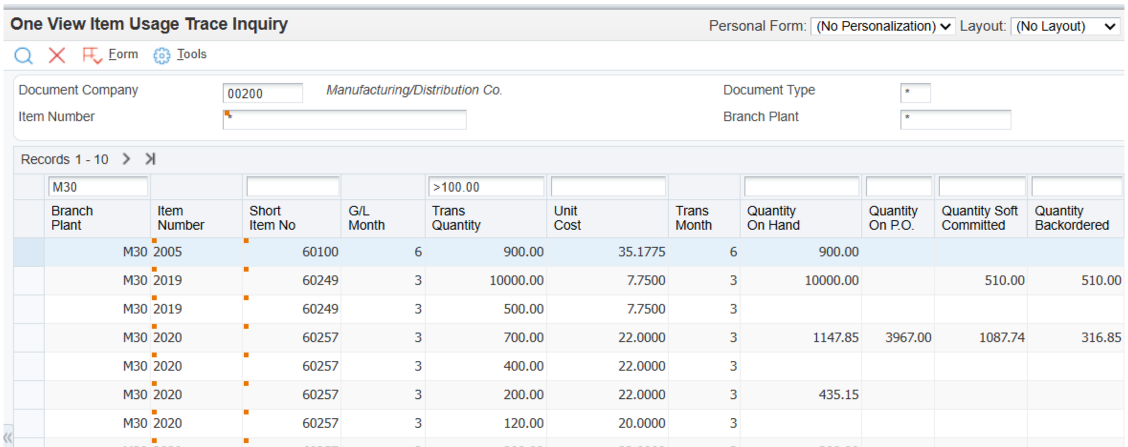
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points


One View Item Usage Trace Inquiry

Personal Form: (No Personalization) Layout: (No Layout)

Form Tools

Document Company 00200 *Manufacturing/Distribution Co.*

Document Type *

Item Number *

Branch Plant *

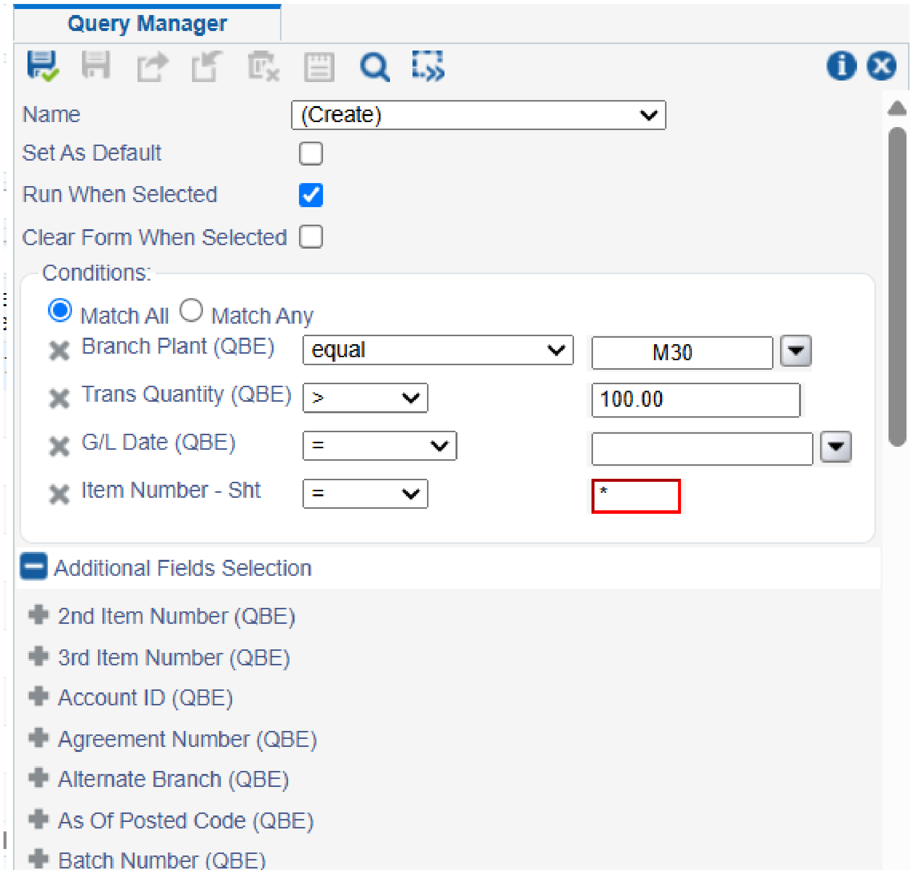
Records 1 - 10

Branch Plant	Item Number	Short Item No	G/L Month	Trans Quantity	Unit Cost	Trans Month	Quantity On Hand	Quantity On P.O.	Quantity Soft Committed	Quantity Backordered
M30				>100.00						
M30	2005	60100	6	900.00	35.1775	6	900.00			
M30	2019	60249	3	10000.00	7.7500	3	10000.00		510.00	510.00
M30	2019	60249	3	500.00	7.7500	3				
M30	2020	60257	3	700.00	22.0000	3	1147.85	3967.00	1087.74	316.85
M30	2020	60257	3	400.00	22.0000	3				
M30	2020	60257	3	200.00	22.0000	3	435.15			
M30	2020	60257	3	120.00	20.0000	3				
M30	2020	60257	3	200.00	22.0000	3	200.00			

Step 3

Create a new query. Use the right pane selections to start with.

Branch plant, transaction qty over certain range, GL date above last year end, item number. This query needs short item numbers, which could be a problem. You may switch over the CAFE1 view instead of watchlist on this subject. Or this inquiry could be customized to get the second item number.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

ST/OT Backorder Aging Alert

Business Requirement:

In multi-distribution manufacturing environment, transfer orders may always get the last priority over manufacturing plant in-house demands (or) the manufacturing plant servicing customer demands. Distribution planners tend to process ST/OT orders early to take care of manufacturing and transportation lead times. Supply Chain planners and managers need to review the backlog periodically to expedite the transfer process. This JDE inquiry helps to solve that issue

Technology used: One view Back ordered item not received inquiry

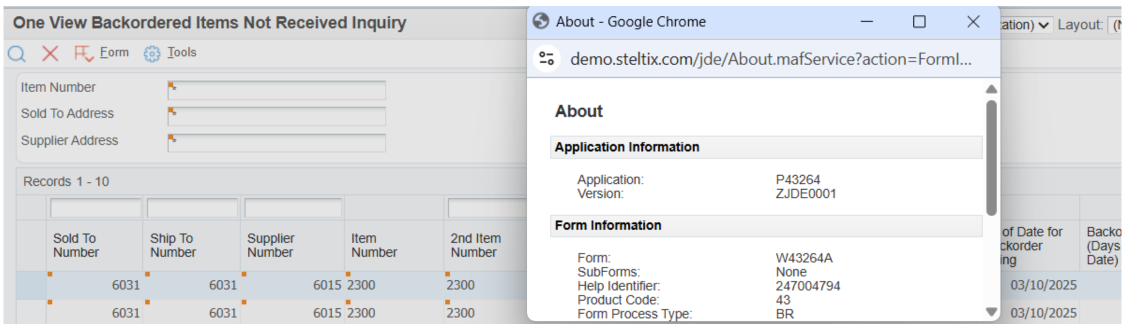
Limitations: None. Please check security granted to right roles, these are one view inquiry applications.

Limitations: None. Please check security granted to right roles

Table/Application Used: P43264

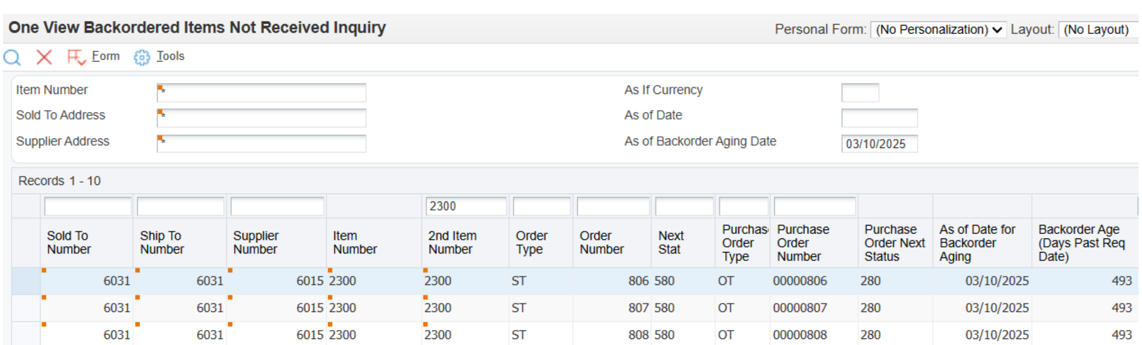
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points. This demo system didn't have many data points. Always pull all common fields instead of basic grids to get to know the availability of necessary fields.

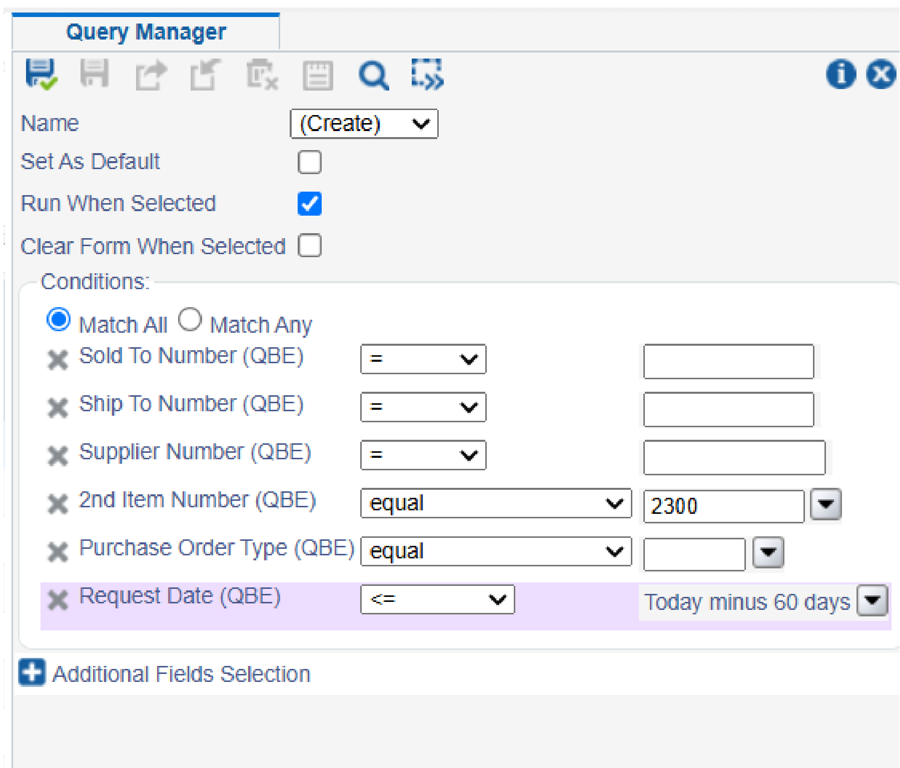


Step 3

Create a new query. Use the right pane selections to start with.

Branch plant, sold/ship to, second item#, PO type and request date range

Add more field as per your business needs.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

MRP PurOrd Messages B & O count Alert

Business Requirement:

As a functional supervisor or manager in purchasing or planning, you need to have an idea on the MRP message count. No one is expecting zero B or O type messages. Not even in the T past due to typing messages.

A casual watchlist on the message count will alert if any major changes to forecast or safety stock happened when you are busy with other activities. It will also act like a reminder to validate your lead times (to control B type messages), safety stock levels, etc.

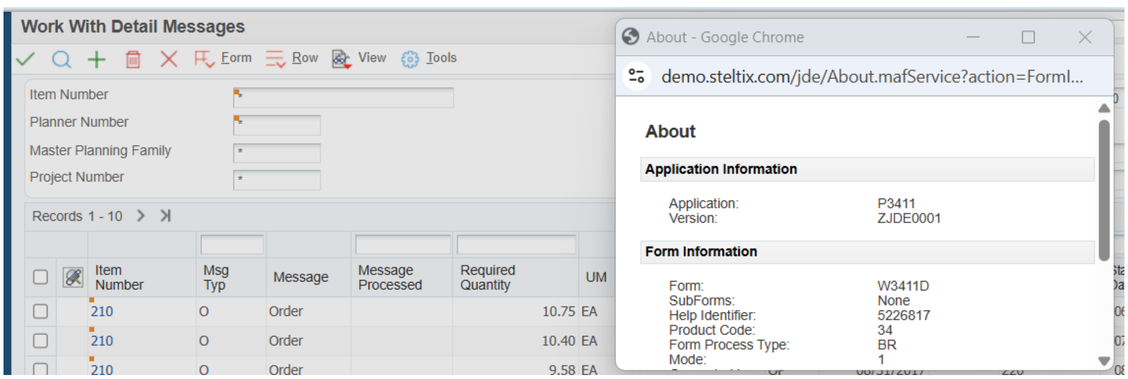
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles. There is also OneView planning analysis application if your management does not want to expose the key p3411 to many other roles.

Table/Application Used: P3411

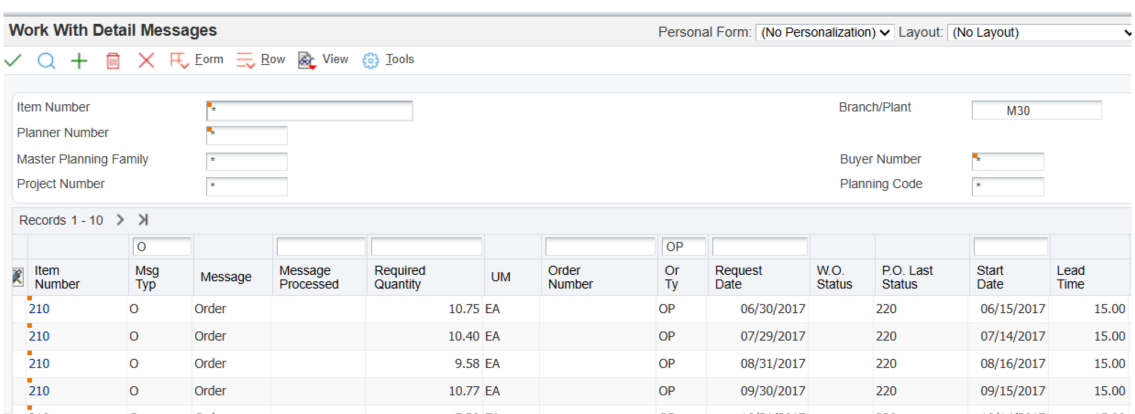
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

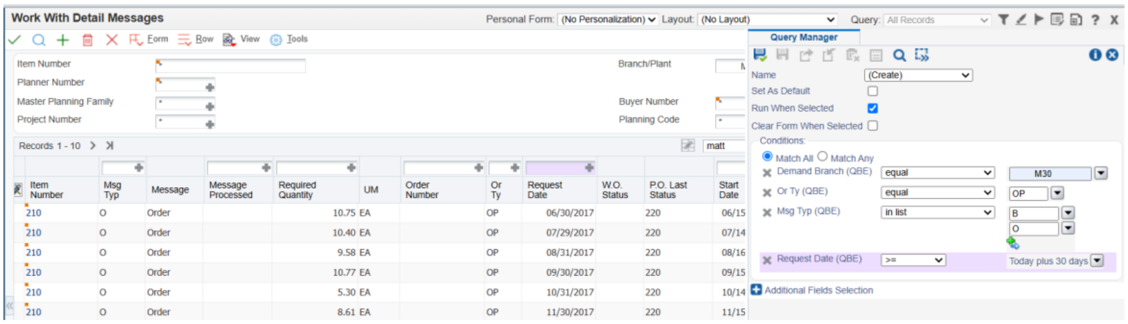
Customize the grid (example below), place some QBE values to get valid data points

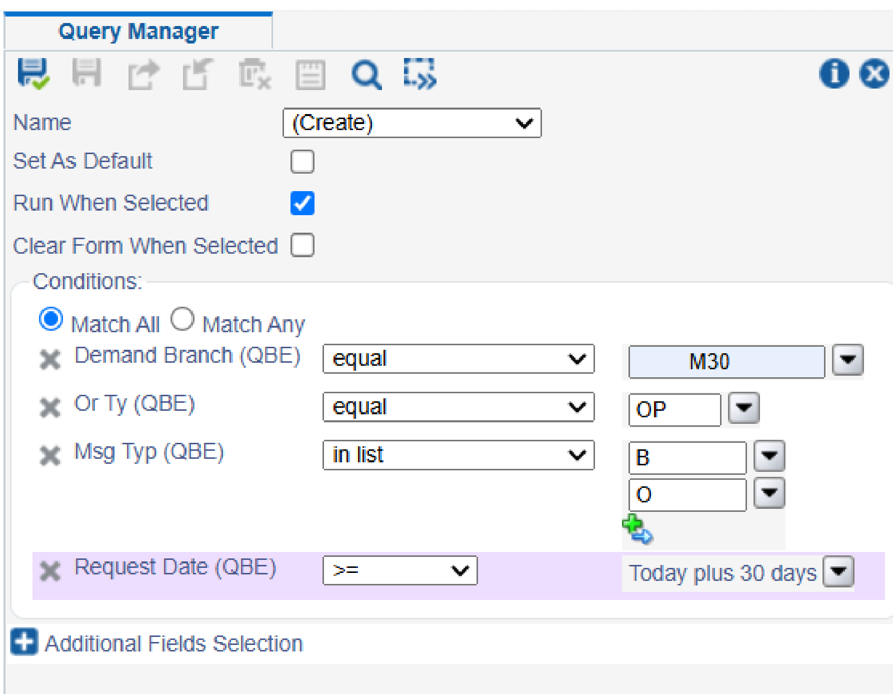


Step 3

Create a new query. Use the right pane selections to start with.

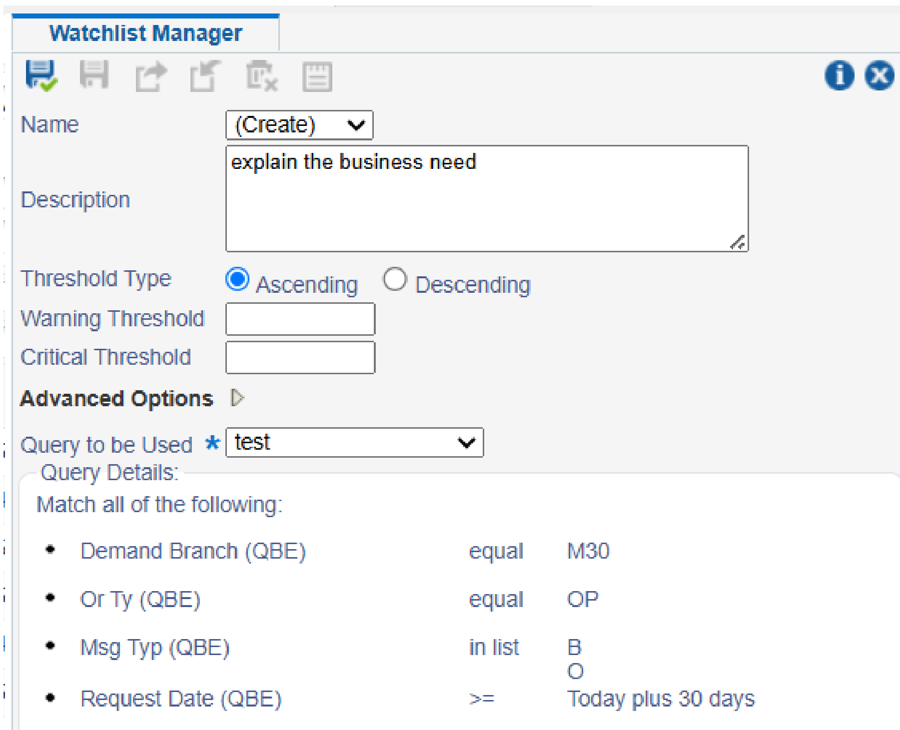
Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which could also be used for T, D,E type of messages. And the date range could vary based on your needs. The idea is to get a total count picture on a daily basis. If the count is very well above or below your expected count, something else is happening in the system!. The watchlist also gives the count total. If you see the static value for a few days that means your nightly MRP batch is not running or failing for some date periods configurations.

MRP PurOrd Messages PAST DUE count Alert

Business Requirement:

As a functional supervisor or manager in purchasing or planning, you need to have an idea on the MRP message count. No one is expecting zero B or O type messages. Not even in the T past due to typing messages.

A casual watchlist on the message count will alert if any major changes to forecast or safety stock happened when you are busy with other activities. It will also act like a reminder to validate your lead times (to control B type messages), safety stock levels, etc. In this example, we are reviewing past due messages after a certain number of days. No one is worried about one- or two-days delays, but sustained backlog is a problem with planning and vendor performances.

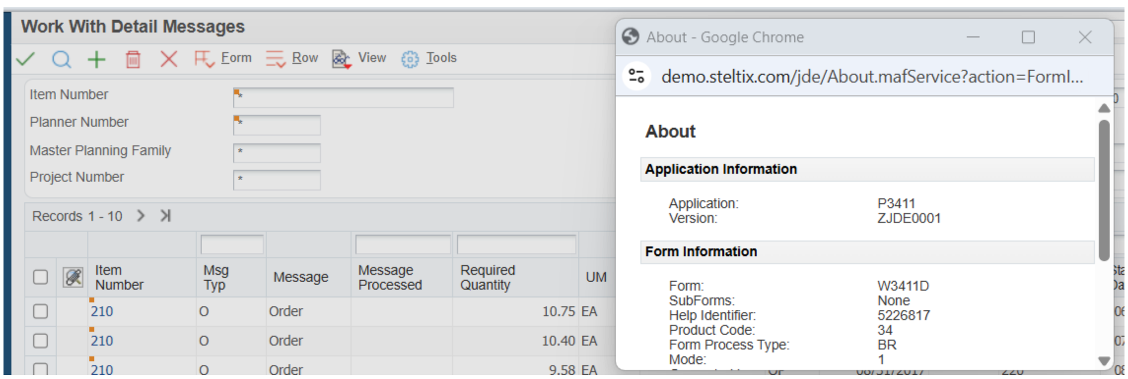
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles

Table/Application Used: P3411

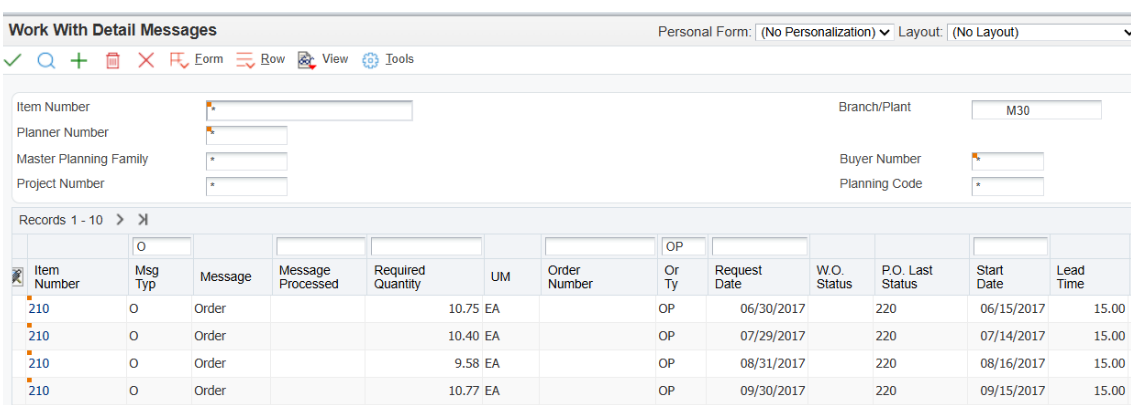
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

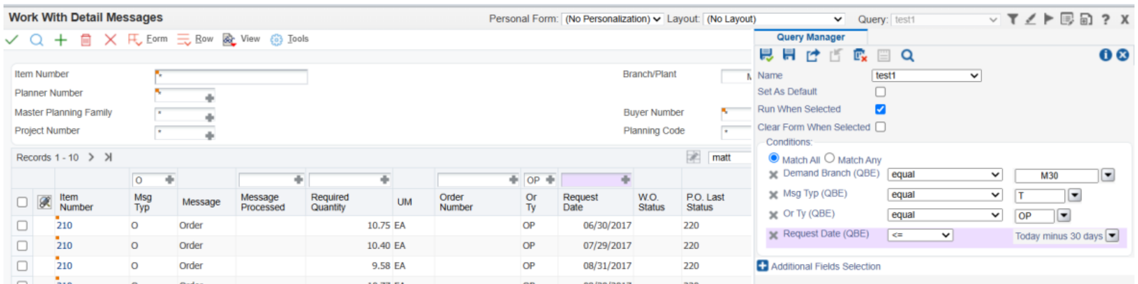
Customize the grid (example below), place some QBE values to get valid data points

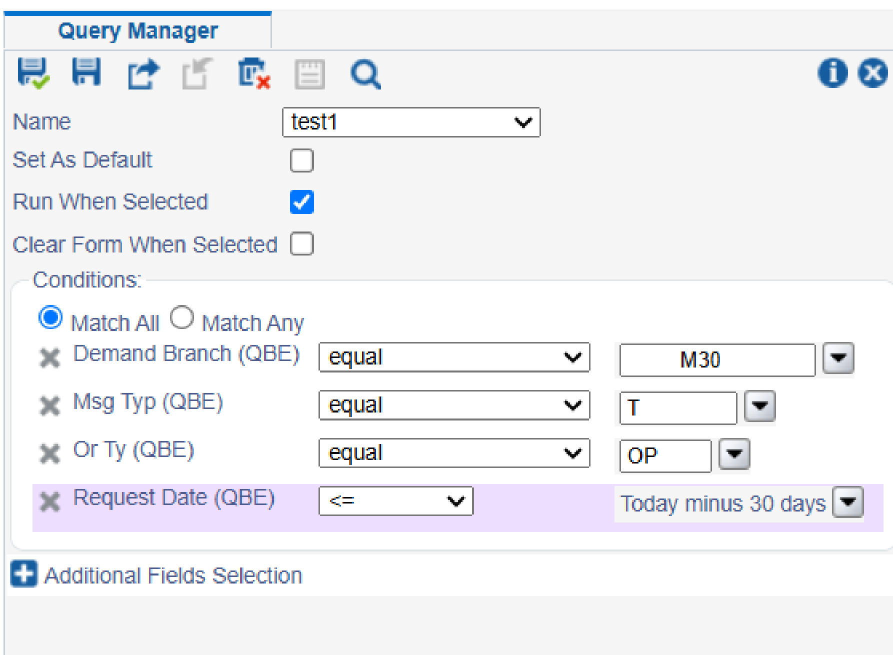


Step 3

Create a new query. Use the right pane selections to start with.

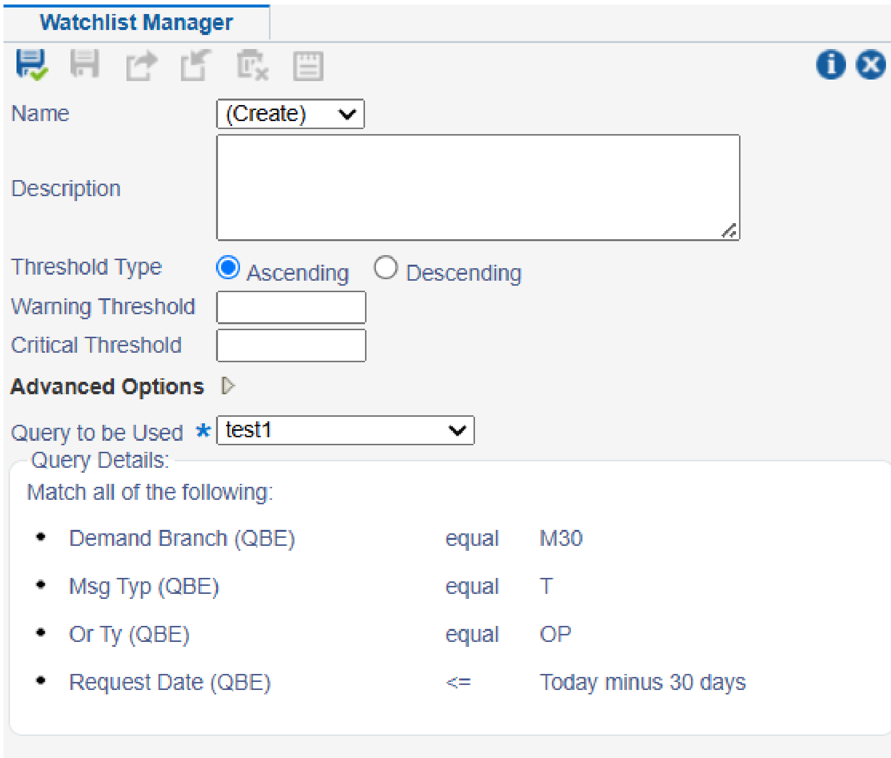
Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which will help the planners without asking for the purchasing team on the delayed purchase orders. You can copy this watchlist to get another view of delays of more than 30 days, which necessitates some serious discussions within the company. In that case, use OneView open purchase order inquiry which has remaining order quantity field values. If the purchase order was received like 99% and there is a residual value left, it is important that purchasing close those orders periodically. This particular aspect has financial implications especially if the vendor ships partial quantities and doesn't invoice for the entire partial quantities yet. And months go by if there are vendor reorganization and business issues.

MRP Workorder Messages B & O count Alert

Business Requirement:

As a functional supervisor or manager in purchasing or planning, you need to have an idea on the MRP message count. No one is expecting zero B or O type messages. Not even in the T past due to type messages.

A casual watchlist on the message count will alert if any major changes to forecast or safety stock happened when you are busy with other activities. It will also act like a reminder to validate your lead times (to control B type messages), safety stock levels, etc.

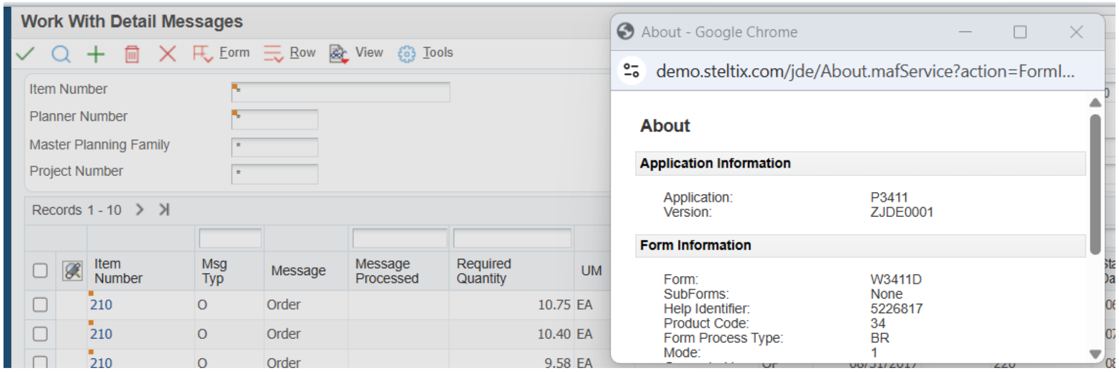
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles. There is also OneView planning analysis application if your management does not want to expose the key p3411 to many other roles.

Table/Application Used: P3411

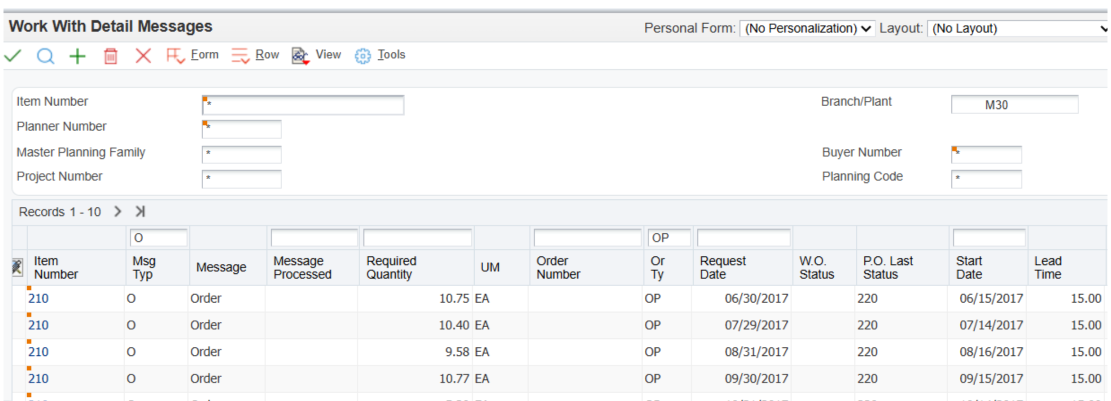
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

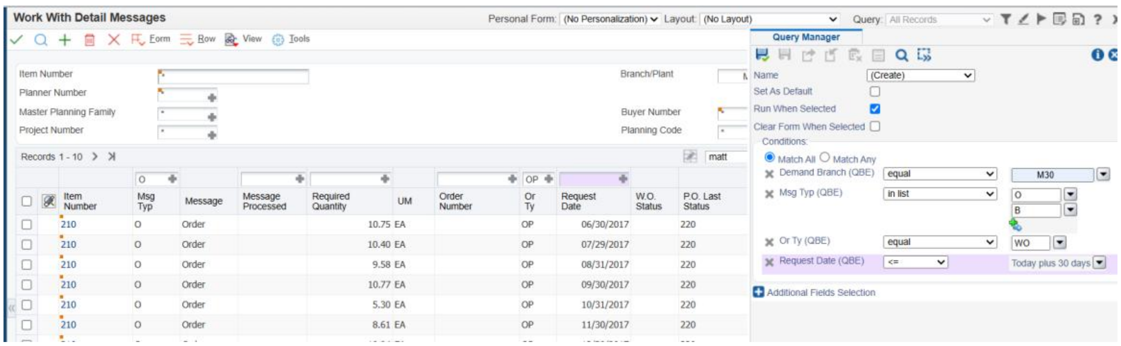
Customize the grid (example below), place some QBE values to get valid data points

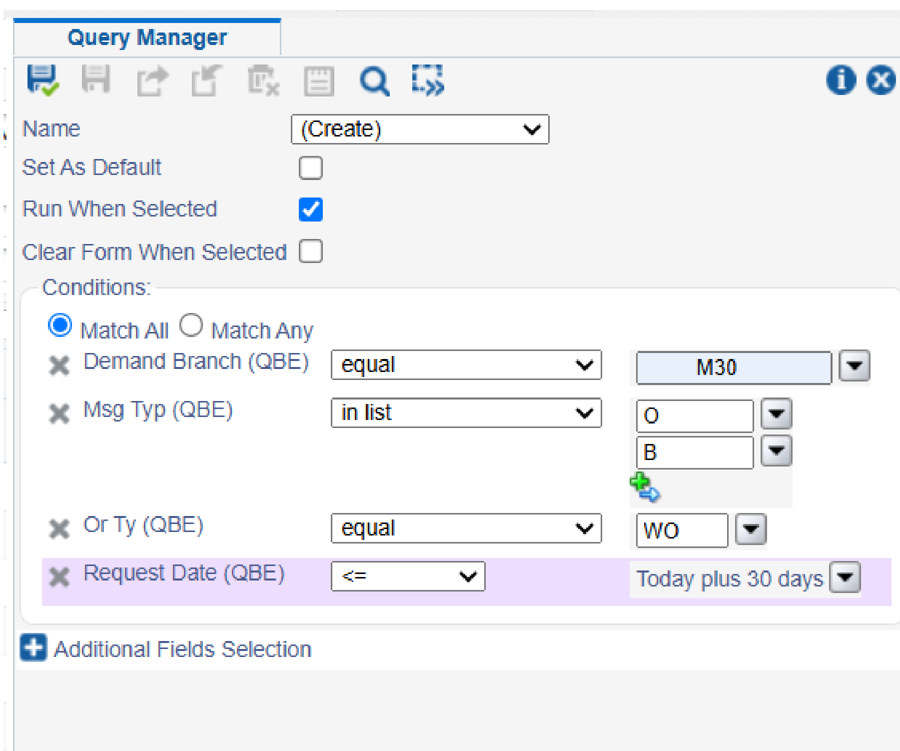


Step 3

Create a new query. Use the right pane selections to start with.

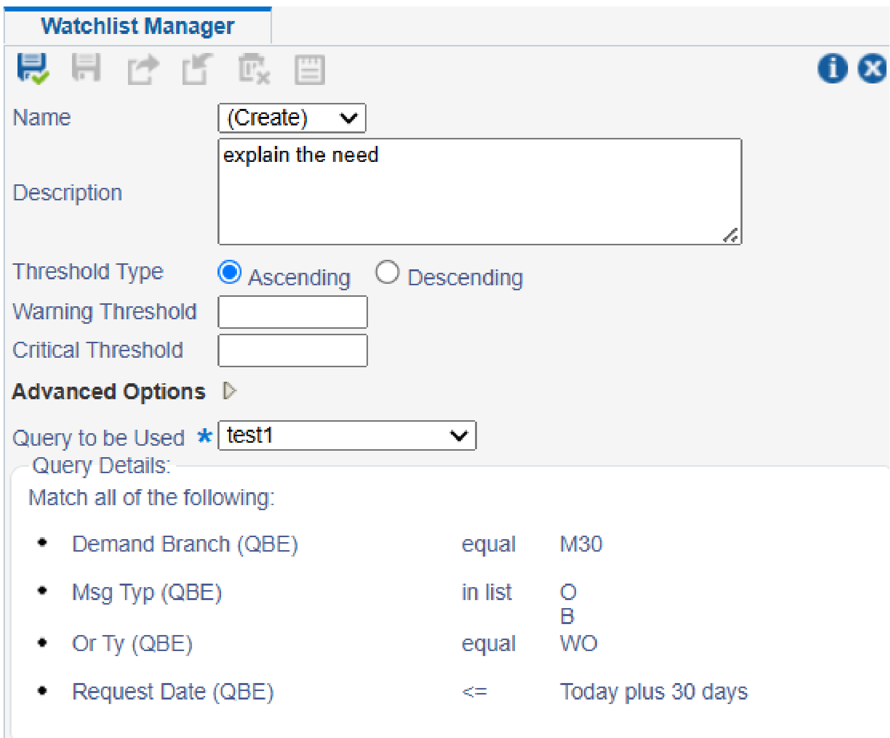
Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which could also be used for T, D,E type of messages. And the date range could vary based on your needs. The idea is to get a total count picture on a daily basis. If the count is very well above or below your expected count, something else is happening in the system!. The watchlist also gives the count total. If you see the static value for a few days that means your nightly MRP batch is not running or failing for some date periods configurations.

MRP Work Ord Messages PAST DUE count

Business Requirement:

As a functional supervisor or manager in purchasing or planning, you need to have an idea on the MRP message count. No one is expecting zero B or O type messages. Not even in the T past due to type messages.

A casual watchlist on the message count will alert if any major changes to forecast or safety stock happened when you are busy with other activities. It will also act like a reminder to validate your lead times (to control B type messages), safety stock levels, etc.

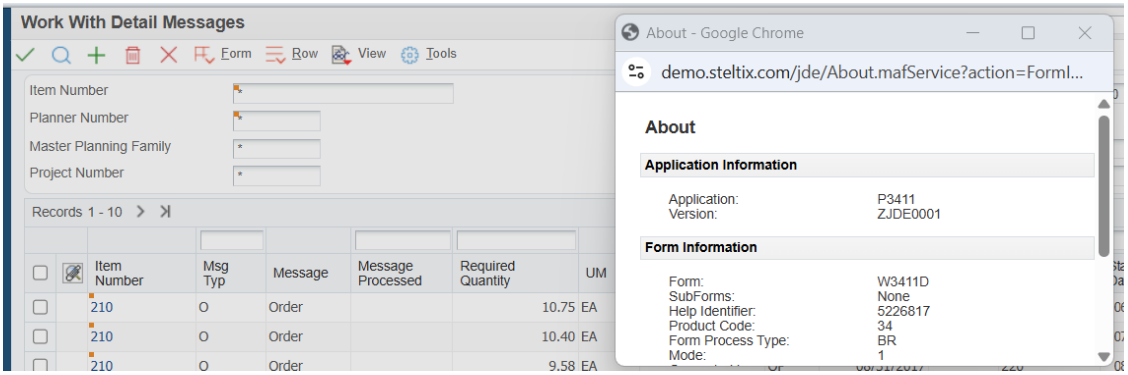
Technology used: MRP messages application

Limitations: None. Please check security granted to right roles

Table/Application Used: P3411

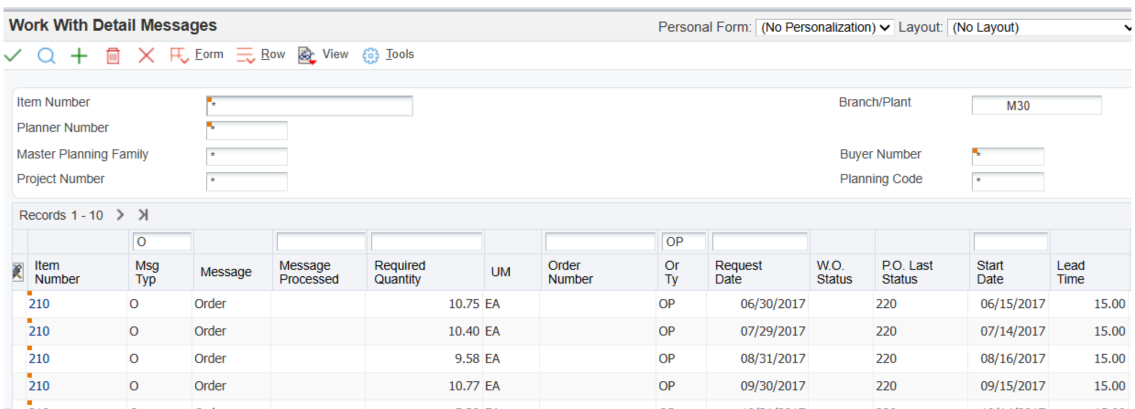
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

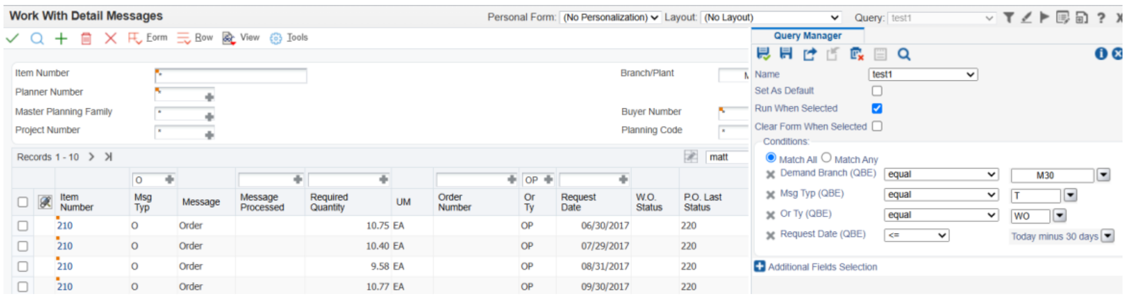
Customize the grid (example below), place some QBE values to get valid data points

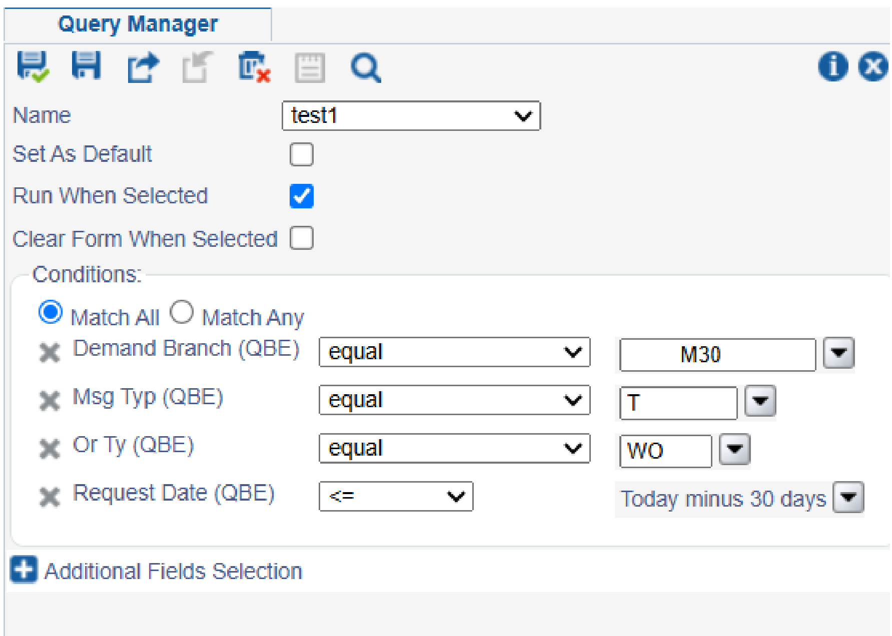


Step 3

Create a new query. Use the right pane selections to start with.

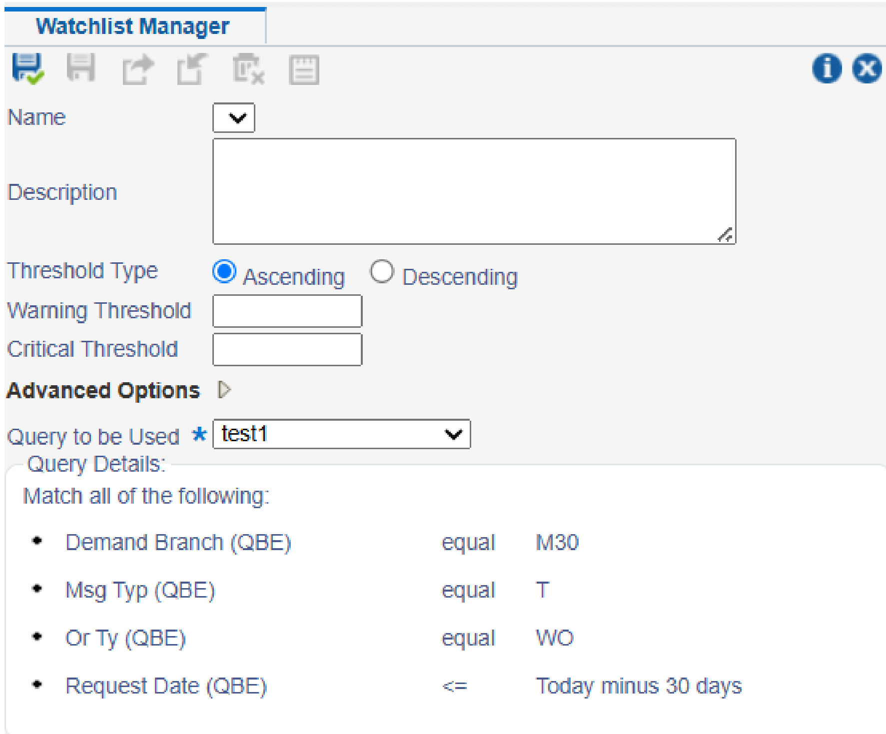
Branch plant, order type, message type, request date >today minus 30 days (as example). Save the query with a unique understandable name





Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This is a very powerful watchlist which could also be used for T, D,E type of messages. And the date range could vary based on your needs. The idea is to get a total count picture on a daily basis. If the count is very well above or below your expected count, something else is happening in the system

You can re-build this query with WO status <=95 to know whether responsibility exists. Supply & Demand inclusion rules should not take work orders above 95 statuses anyway. Also better to review workorders are some placeholder status(s) like 05 or 80, where accounting or shop floor supervisor place them in parking lot reviews. These should typically be cleared by the month end to get clearer variance and WIP accounting transactions.

MRP items MDF less than LT Alert

Business Requirement:

One of the MRP performance indicators is to have a message display fence greater than lead time in the item branch planning values. Message display fence less than lead time will result in less MRP Messages and then sudden surge once the lead time days window is open. It will give misleading MRP message count. If the users complain about having a large count of messages, one can filter out request date (< date) and also use different message type values (B, O, T, etc.) in the message review application P3411

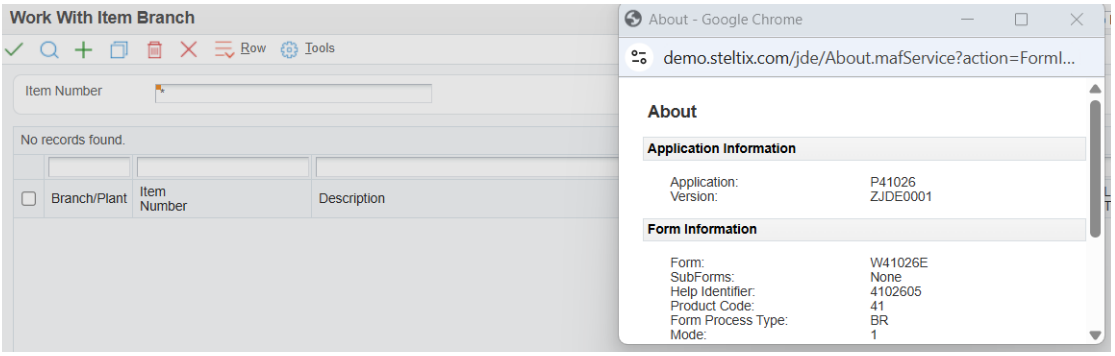
Technology used: Item Branch application

Limitations: None. Please check security granted to right roles

Table/Application Used: P3411

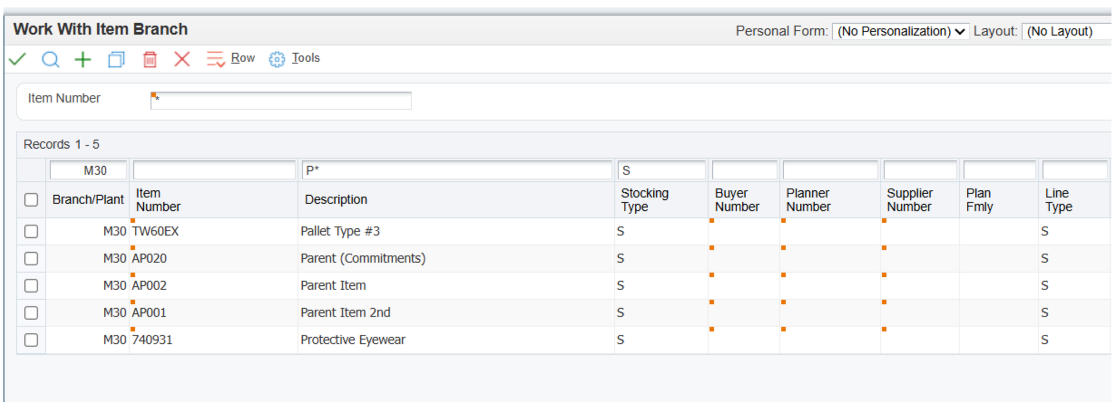
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

Customize the grid (example below), place some QBE values to get valid data points



Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
60193		I	1	1			2		5
60003		I	1	1			2		5
60011		I	1	1			2		15
60020		I	1	1			2		10
60169		I	1	1			2		5
60177	10	U	1	1	15	C	3	60	5
60185		I	1	1			2		5
60071		I	1	1			2		15
60134		I	1	1			2		5
60142	10	U	1	1	15	C	3	60	5

test

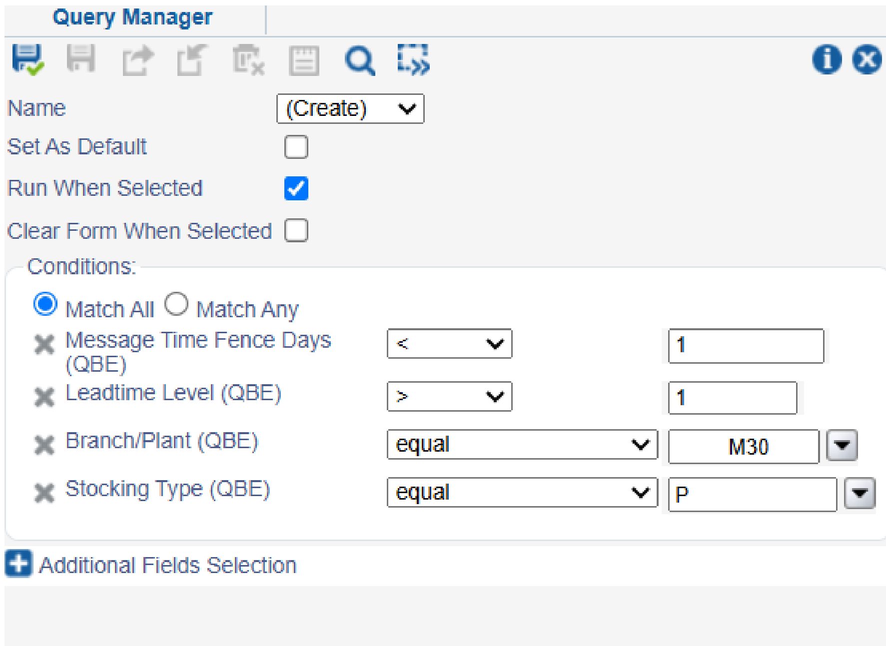
Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
								<1	>1
60775		I	1	1			2		20
60716		I	1	1			2		5
723962		I	1	1			2		2
60863		I	1	1			2		25
60871		I	1	1			2		25
60880		I	1	1			2		4
60898		I	1	1			2		4
723971		I	1	1			2		2
723989		I	1	1			2		2
723997		I	1	1			2		2

The above view is an example of grid extension on item branch application. Creating grid extension is separately explained in later part of the book

Step 3

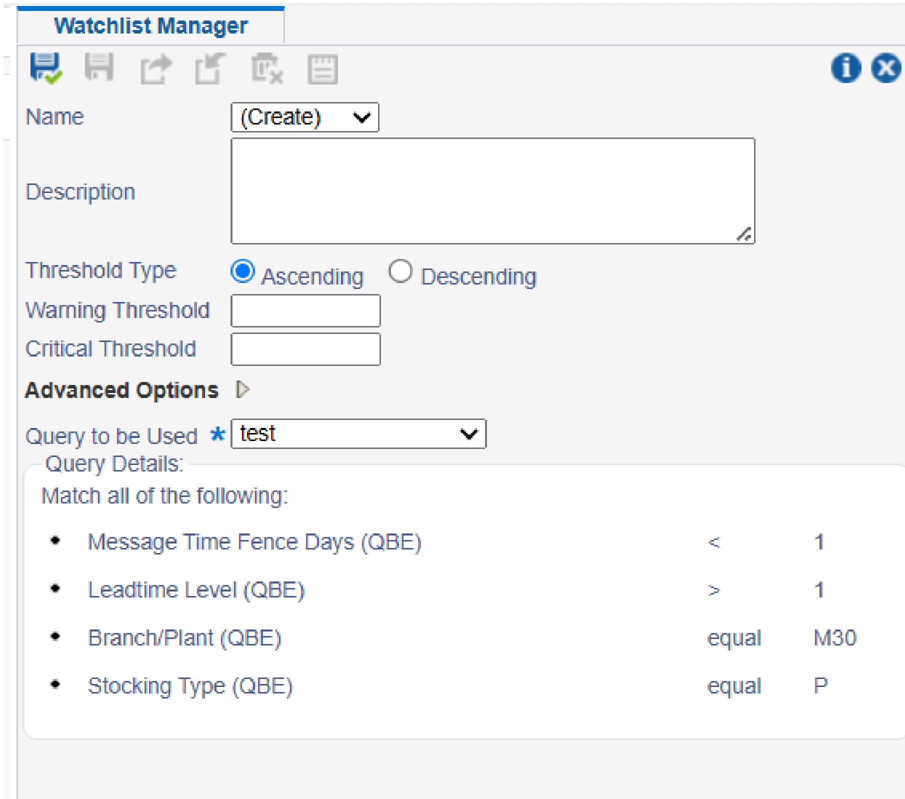
Create a new query. Use the right pane selections to start with.

Branch plant, stocking type, lead time > 1 (this example), etc. Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: Ideally we want the data where message time fence days is less than lead time level days, which is possible in SQL queries. But for watchlists, you can export data periodically and do excel VLOOKUP to get the subset of exceptions. I hope future releases provide field level comparison features under watchlists.

MRP items where Item Primary Supplier is blank Alert

Business Requirement:

Releasing purchase orders from Message Review MRP application requires a primary supplier value. MRP release will fail for blank supplier value. PDM or Purchasing personnel who are responsible for setting up this value could have this watchlist. An example below is shown for some critical fields. You can expand it using MRP planning parameters (that require grid extension) so that the watchlist is useful and productive. You do not care about blank values in non-MRP item branch SKUs.

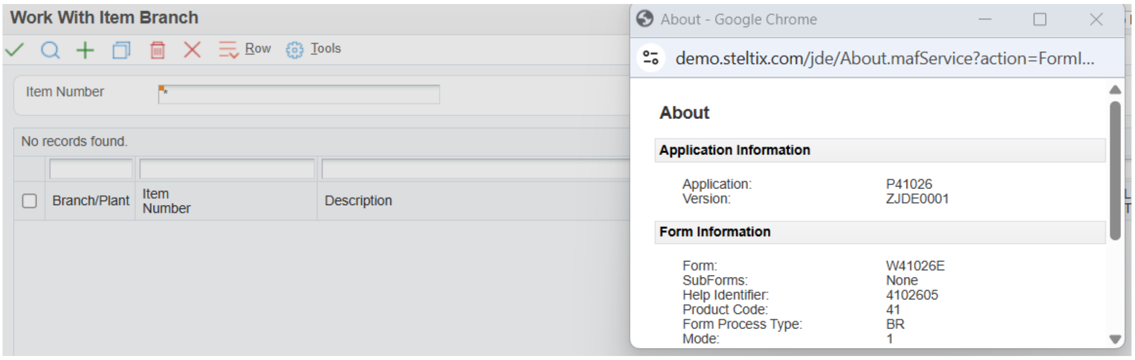
Technology used: Item Branch application

Limitations: None. Please check security granted to right roles

Table/Application Used: P41026

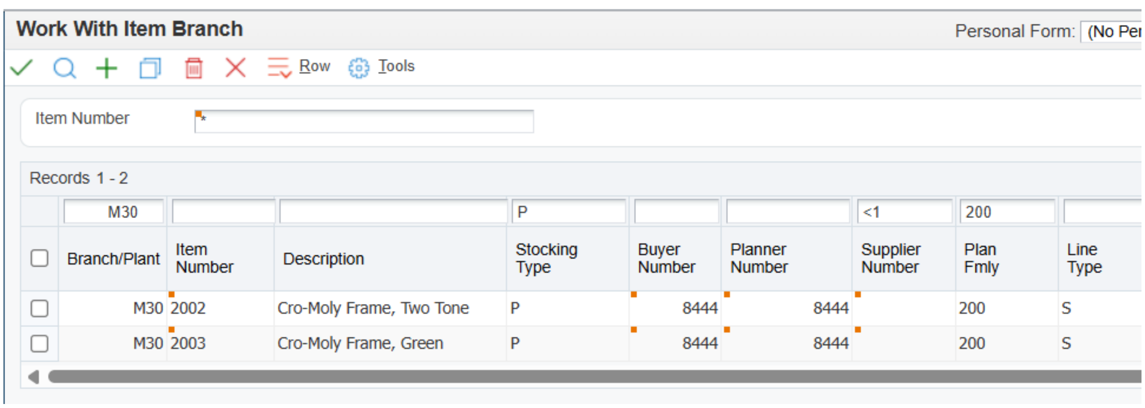
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

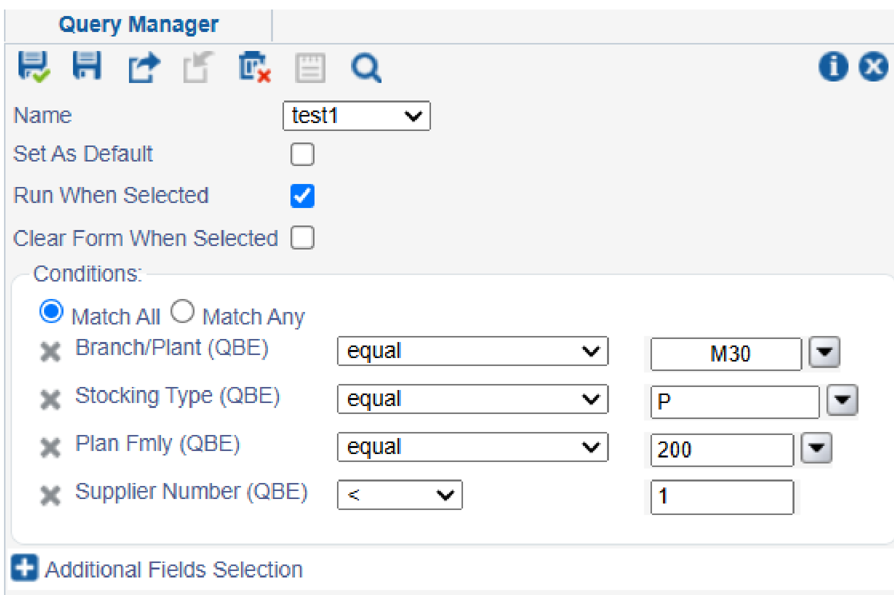
Customize the grid (example below), place some QBE values to get valid data points



Step 3

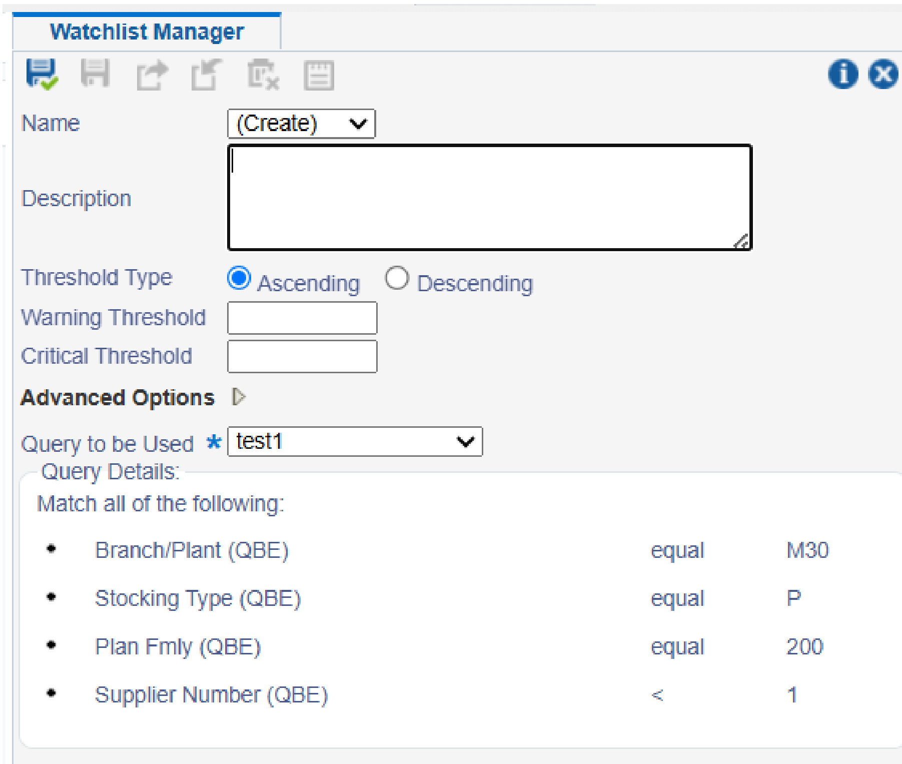
Create a new query. Use the right pane selections to start with.

Branch plant, stocking type, planning family (200 in this example), supplier number <1 (as example). Save the query with a unique understandable name



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

NOTE: This above example uses planning family (PRP$) and stocking type=P values. You can add more conditions like planning code=1 and other category codes to get the fine-tuned list. Also note that stocking type=P in multi-branch ST/OT environment means something, where blank supplier code is a valid reason. You may have to exclude those distribution branches and focus on manufacturing plants where purchase orders (not transfer orders) are placed

WO component issues qty surprises Alert

Business Requirement:

In a fast-moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn't work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

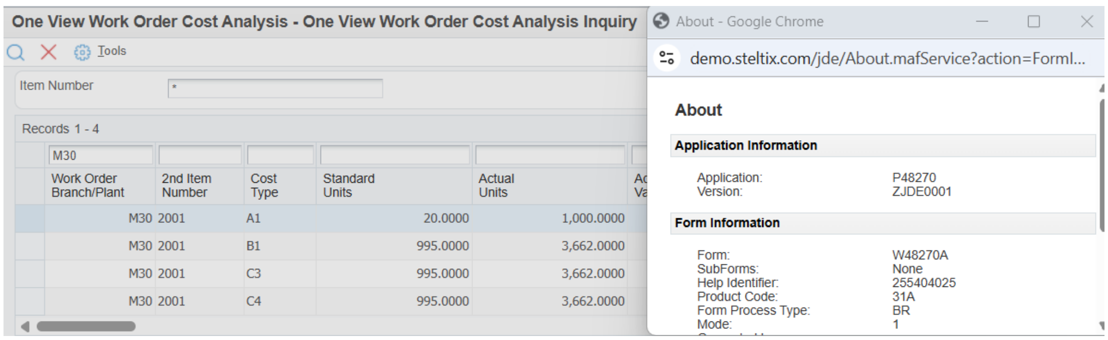
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48270

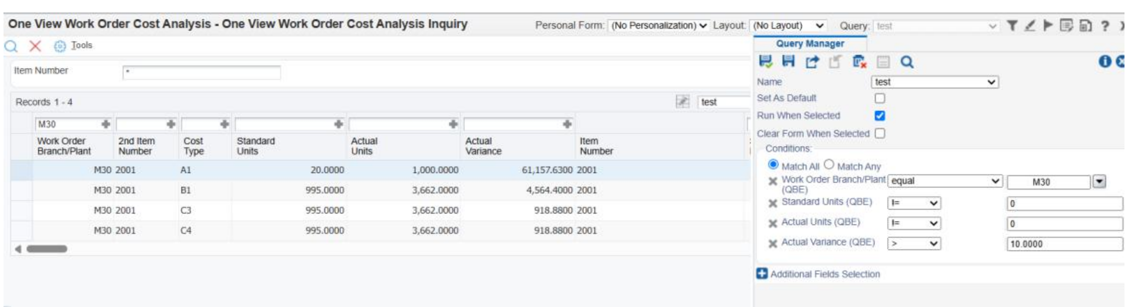
Step 1

Open One View WO cost analysis inquiry application

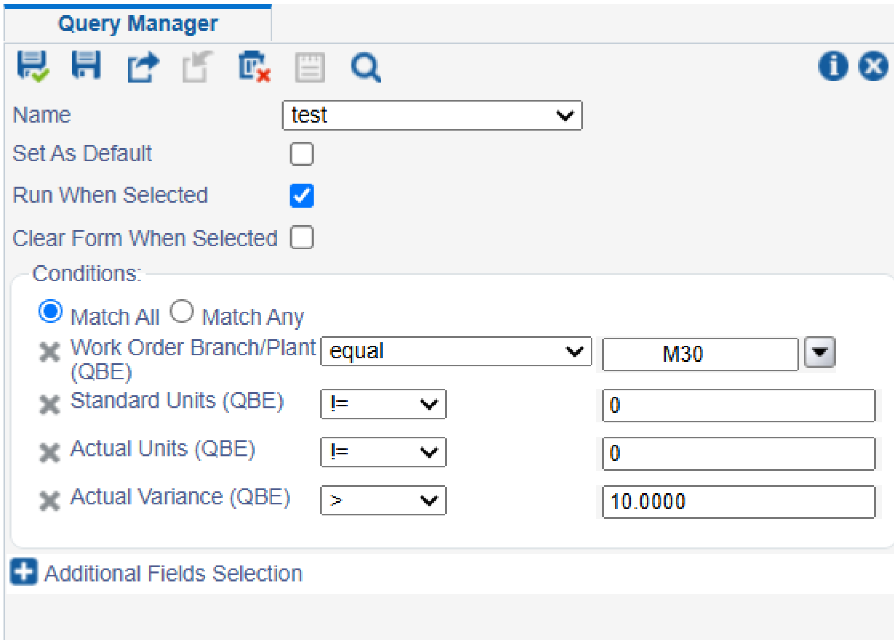


Step 2

Populate some QBE values and create a new query

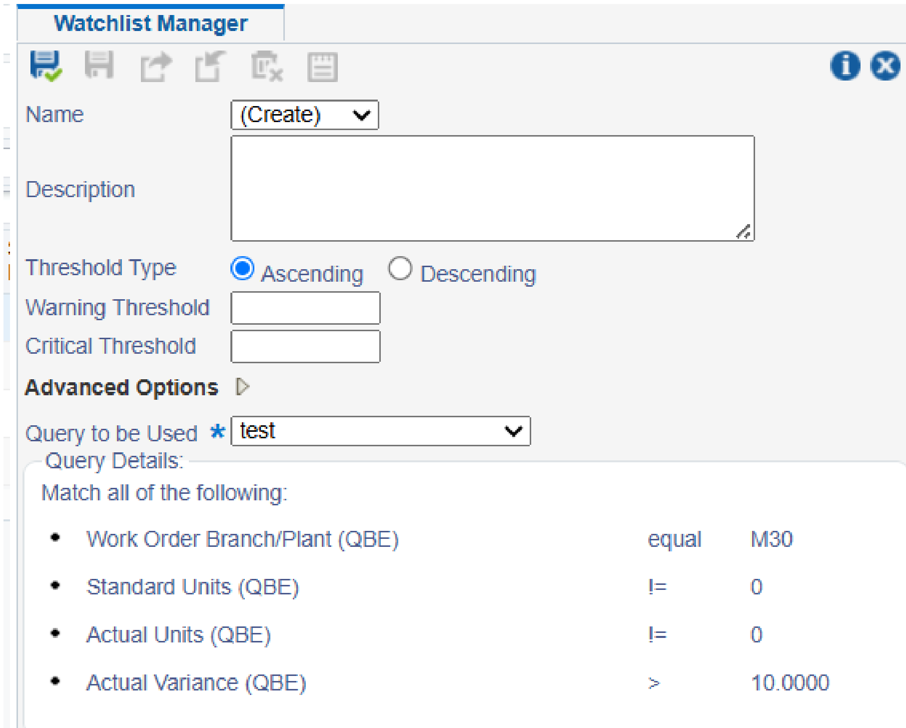


Bigger view of the query manager



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

Work order Engg threshold $ Alert

Business Requirement:

In a fast-moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn't work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

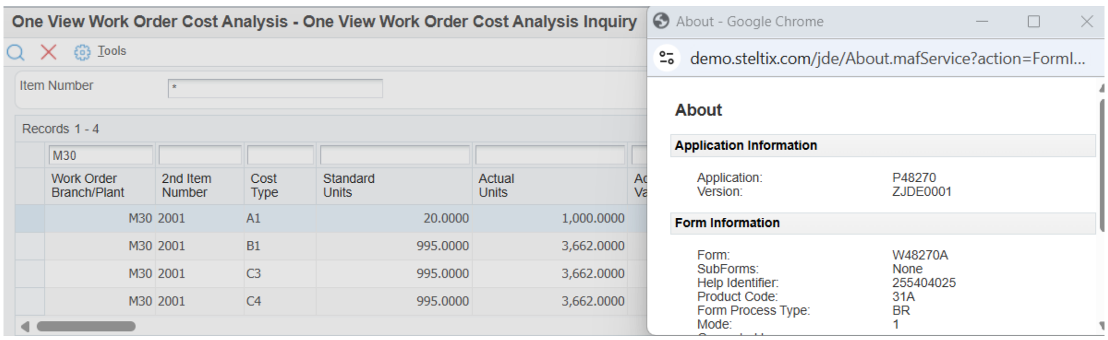
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48270

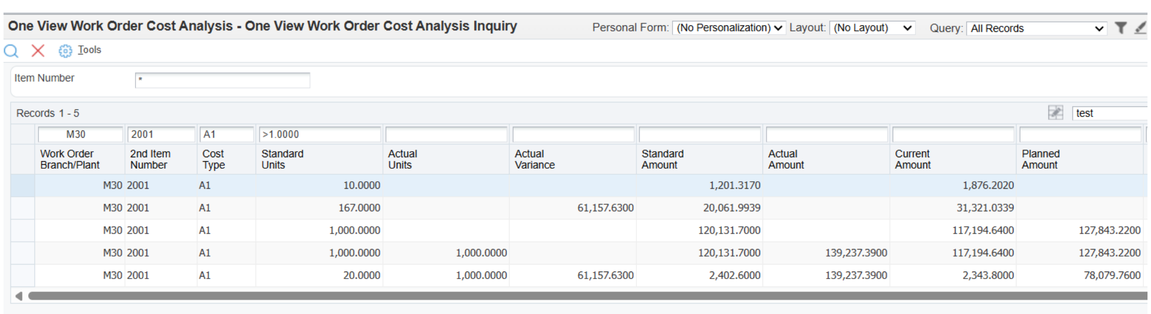
Step 1

Open One View WO cost analysis inquiry application

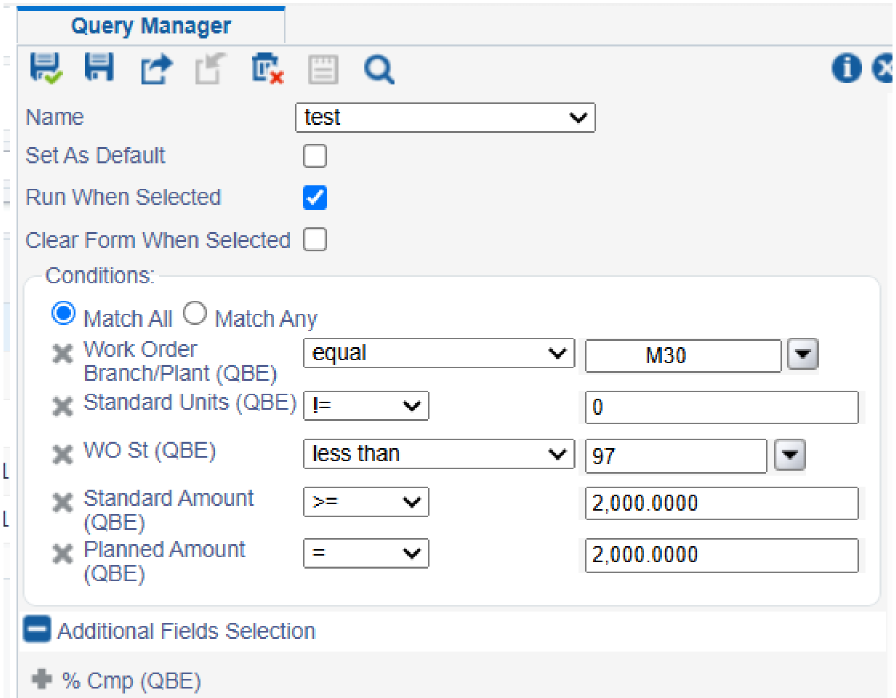


Step 2

Populate some QBE values and create a new query



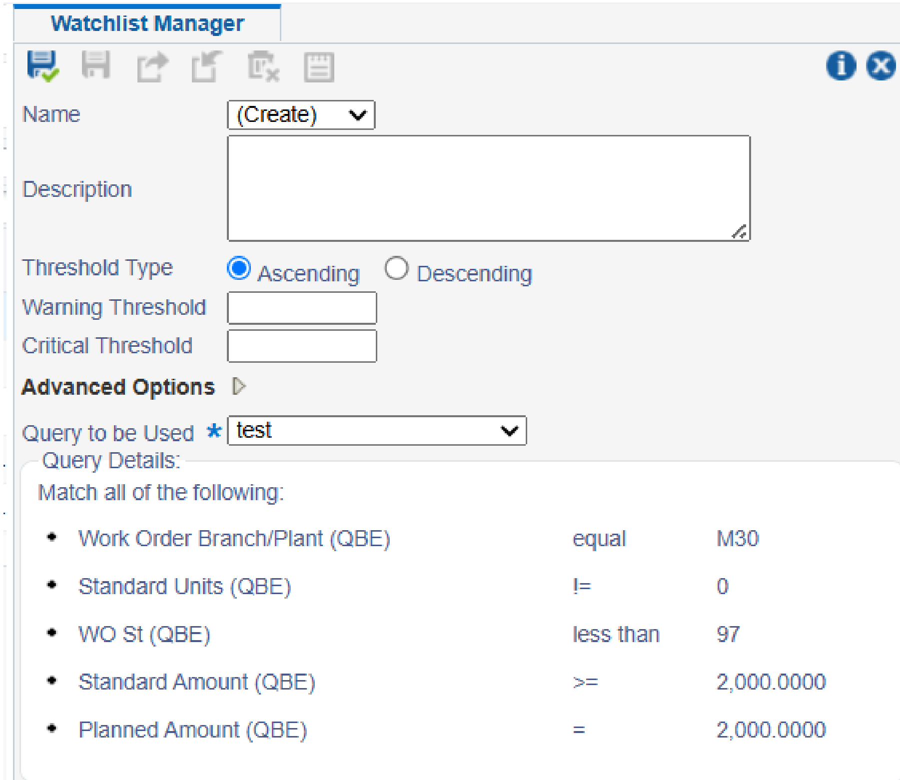
Bigger view of the query manager



Include cost type=A1 to the above

Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

Work order Planned threshold $ Alert

Business Requirement:

In a fast-moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn't work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

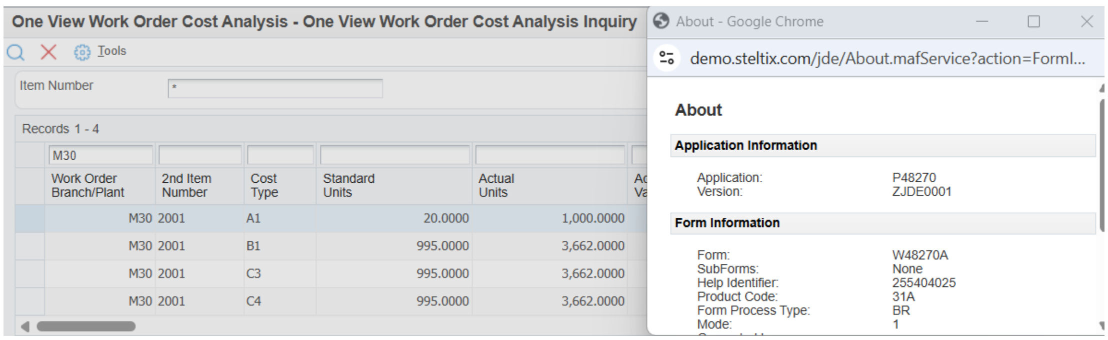
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48270

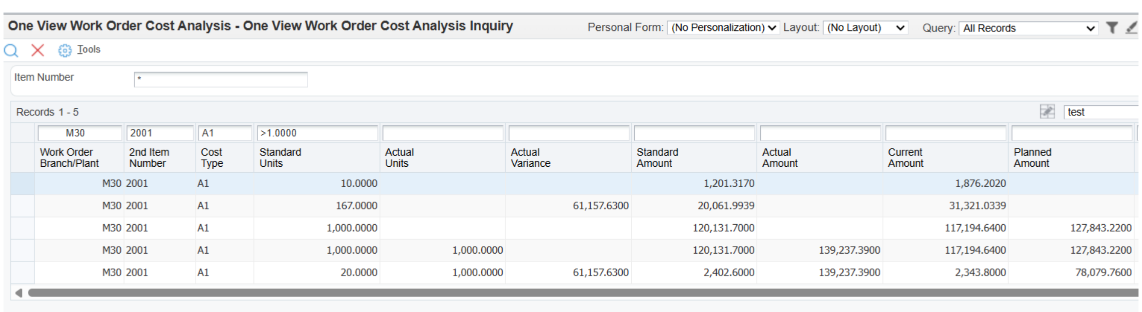
Step 1

Open One View WO cost analysis inquiry application

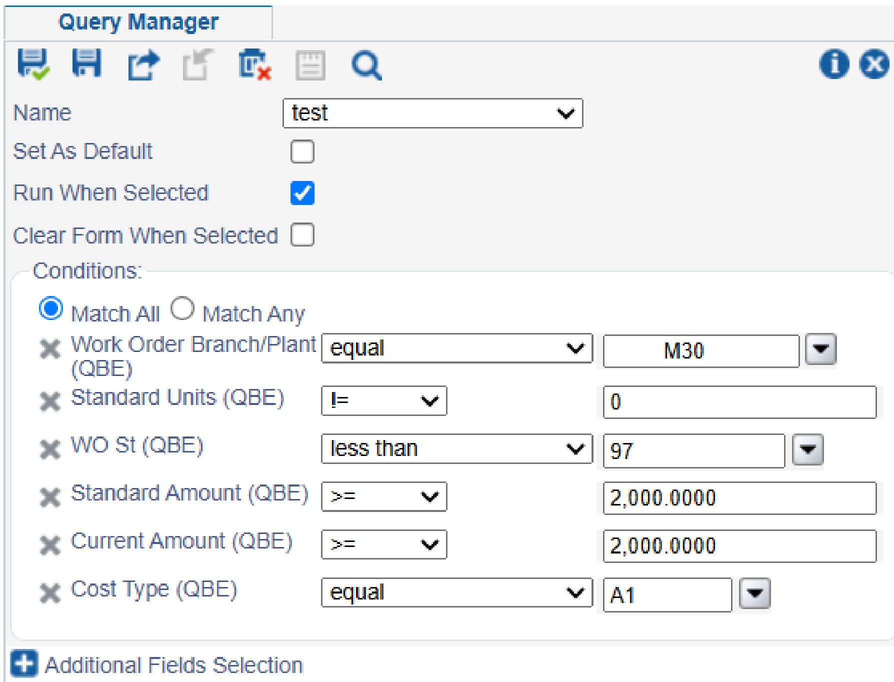


Step 2

Populate some QBE values and create a new query

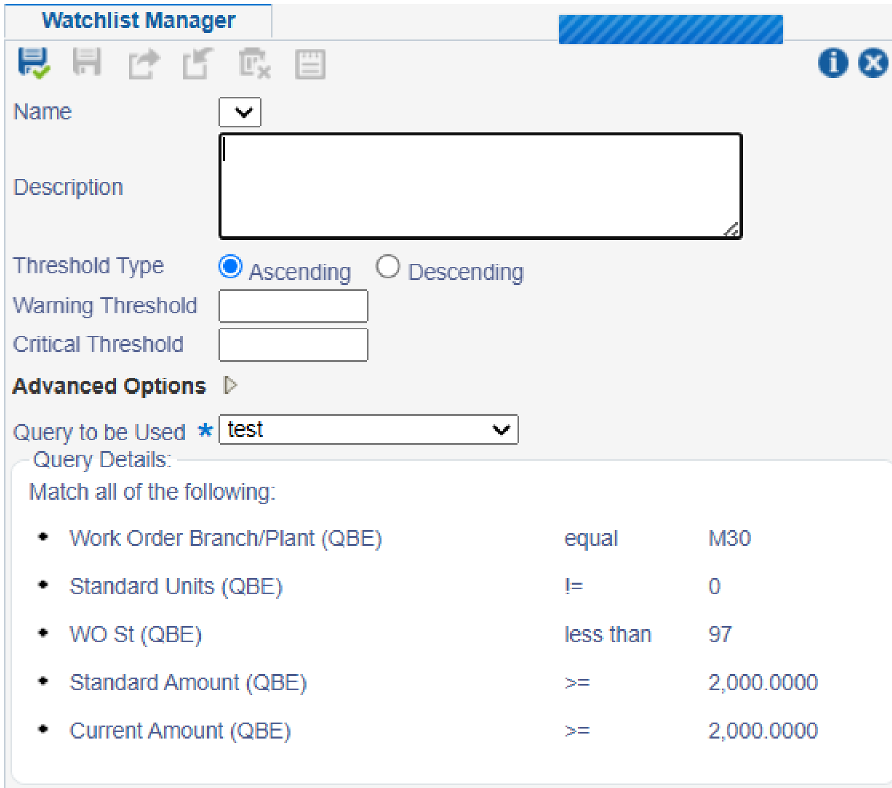


Bigger view of the query manager



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

Work Order Operations Delayed Alert

Business Requirement:

On long lead time manufacturing environment, work orders get delayed at one or more work centers. Schedulers keep chasing the work order progress, but the planners or manufacturing supervisors need an alert that can tell the delays in a snapshot. That will help in rescheduling work orders and/or additional over time for those work centers.

This acts like an exception dispatch list which needs management attention.

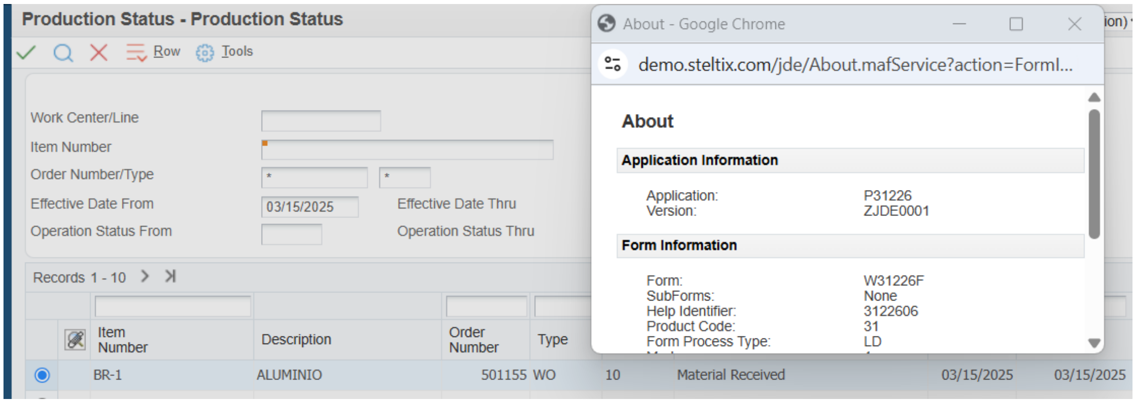
Technology used: Watch list

Limitations: None. Please check security granted to right roles

Table/Application Used: P31226

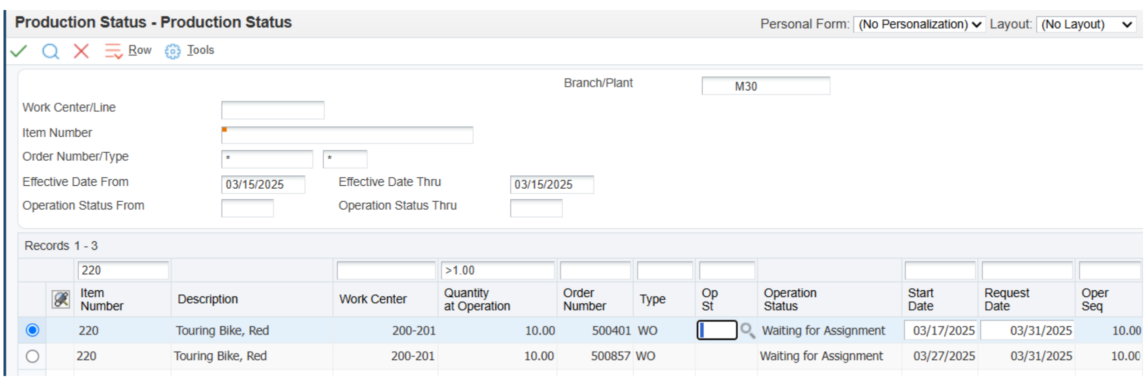
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

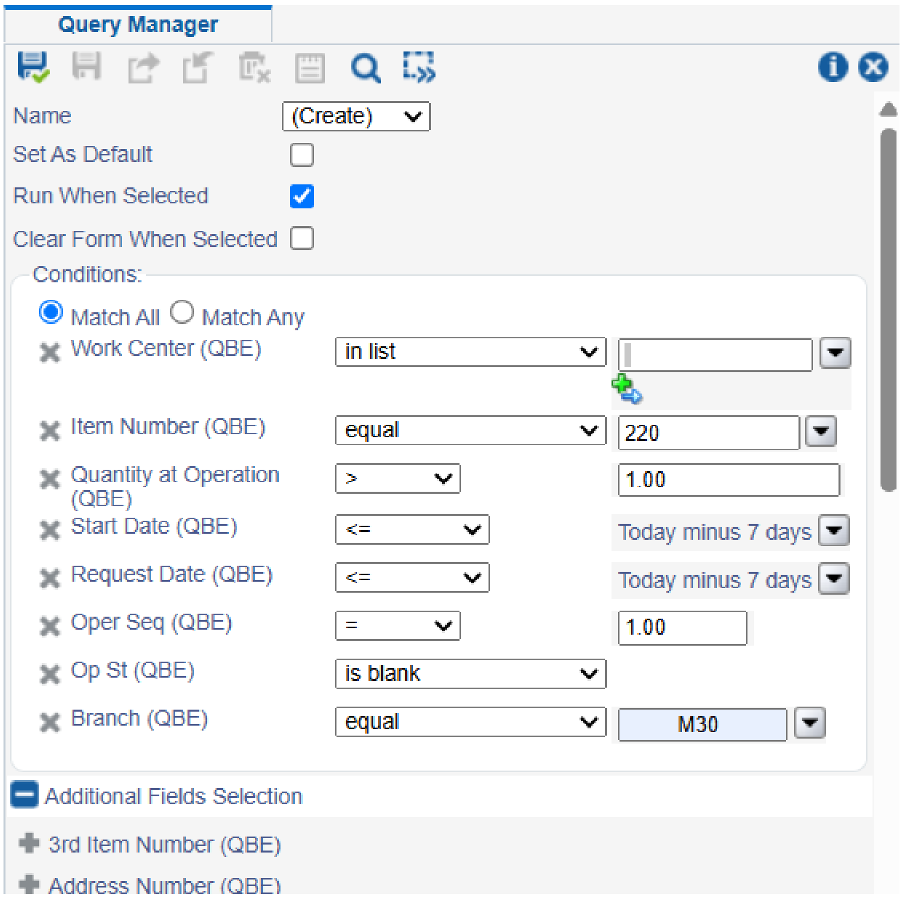
Customize the grid (example below), place some QBE values to get valid data points



Step 3

Create a new query. Use the right pane selections to start with.

You can focus on critical work center (or the typical last work center in a schedule), with item number or not, quantity at operation >1, start and request date variations. Operation sequence and status are useful parameters if you are using them.


Query Manager
Name
(Create)
Set As Default
Run When Selected
Clear Form When Selected
Conditions:
Match All
Match Any
Work Center (QBE)
in list
Item Number (QBE)
equal
220
Quantity at Operation (QBE)
>
1.00
Start Date (QBE)
<=
Today minus 7 days
Request Date (QBE)
<=
Today minus 7 days
Oper Seq (QBE)
=
1.00
Op St (QBE)
is blank
Branch (QBE)
equal
M30
Additional Fields Selection
3rd Item Number (QBE)
Address Number (QBE)

Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

Work order Actual threshold $ Alert

Business Requirement:

In a fast-moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn’t work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can possibly be stopped with the change in processing option.

Workorders are getting completed and go to 95 (typically). Manufacturing accounting runs at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better bookkeeping purposes. You don’t want to book the next months or many months after regular transactions have happened.

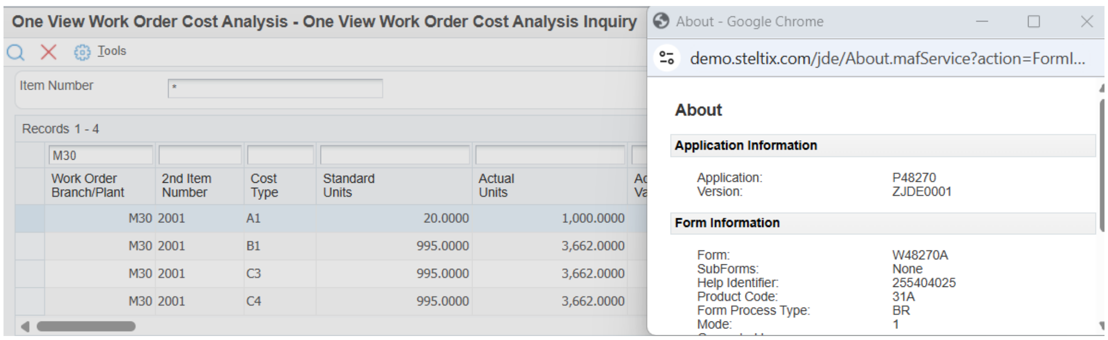
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48270

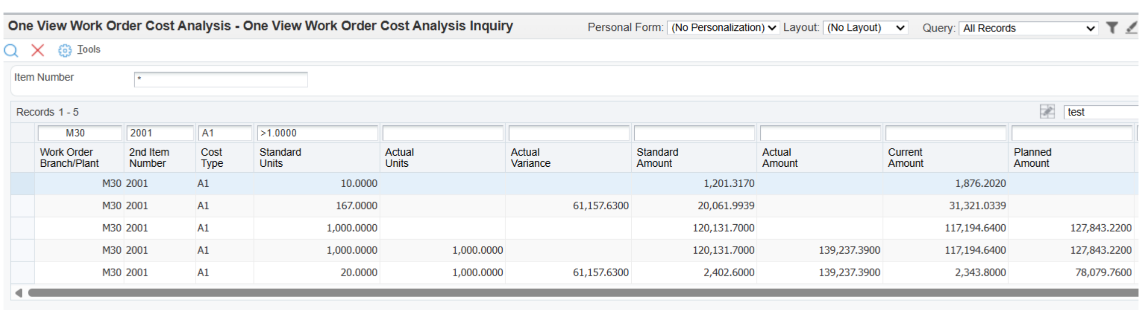
Step 1

Open One View WO cost analysis inquiry application

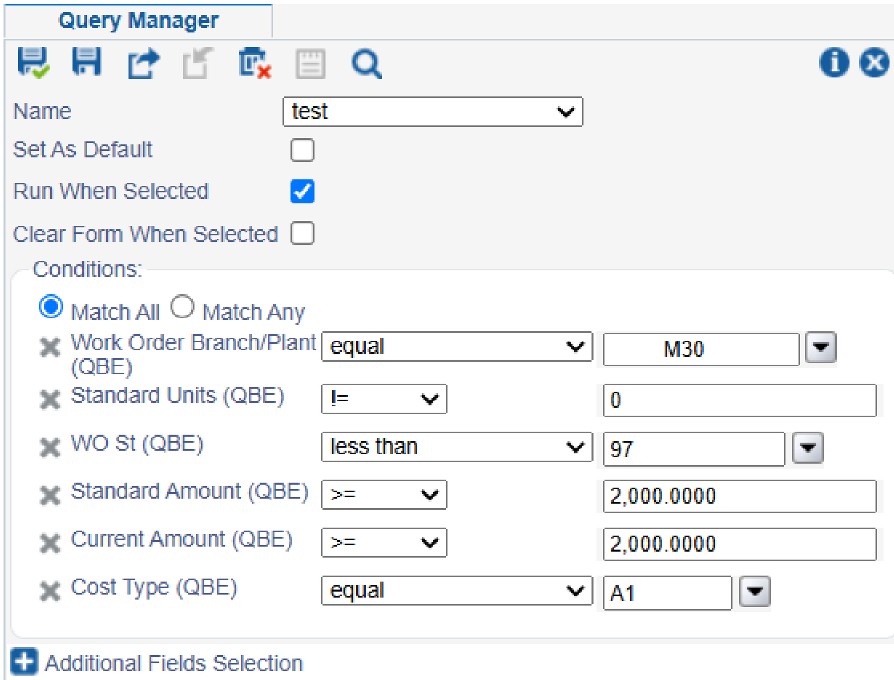


Step 2

Populate some QBE values and create a new query



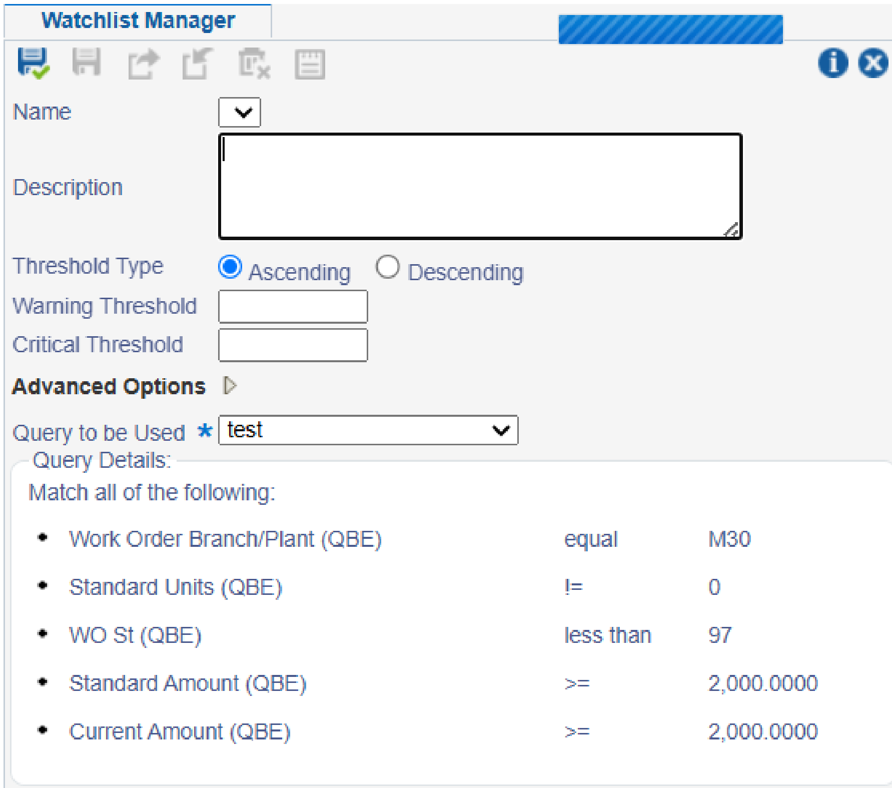
Bigger view of the query manager



Replace the current amount field with actual amount field

Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

Work order exception status & age analysis Alert

Business Requirement:

You could be the manufacturing supervisor who manages work orders that are processed and completed successfully. If the work order goes through certain steps and then there is a need to keep the work order from processing, you can either use hold code (or) use a special status like 82 (example). Or sometimes planners use status like 08 to keep the workorder from NOT getting picked up further into the next steps.

Another example, as a cost accountant, you push the order status to 92 (example) or keep at 96 and not do variance accounting yet.

This watchlist could be used for a variety of reasons and you create each one for the age analysis, like <30 days, ><60 days, ><90days

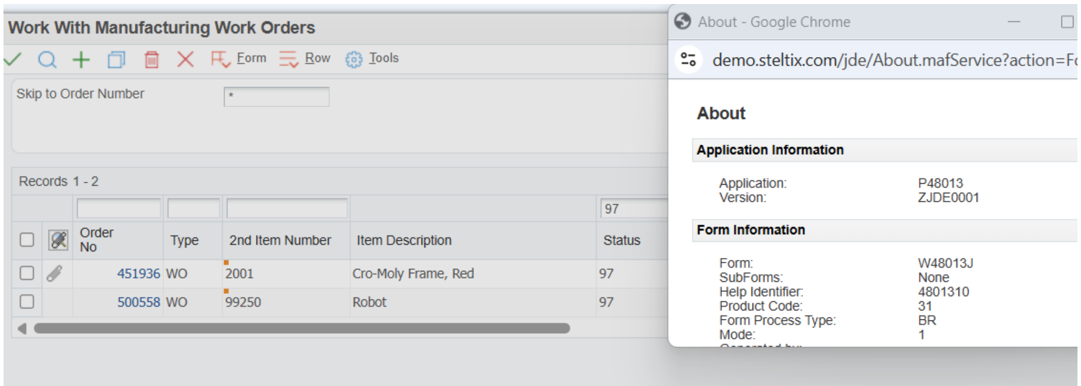
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48013

Step 1

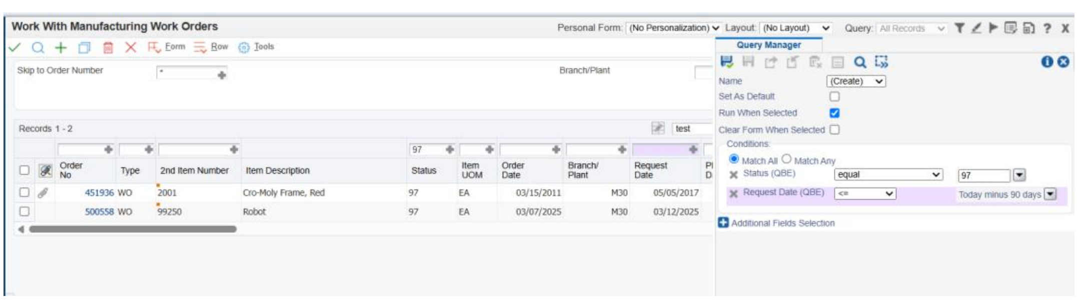
Open Workorder entry application



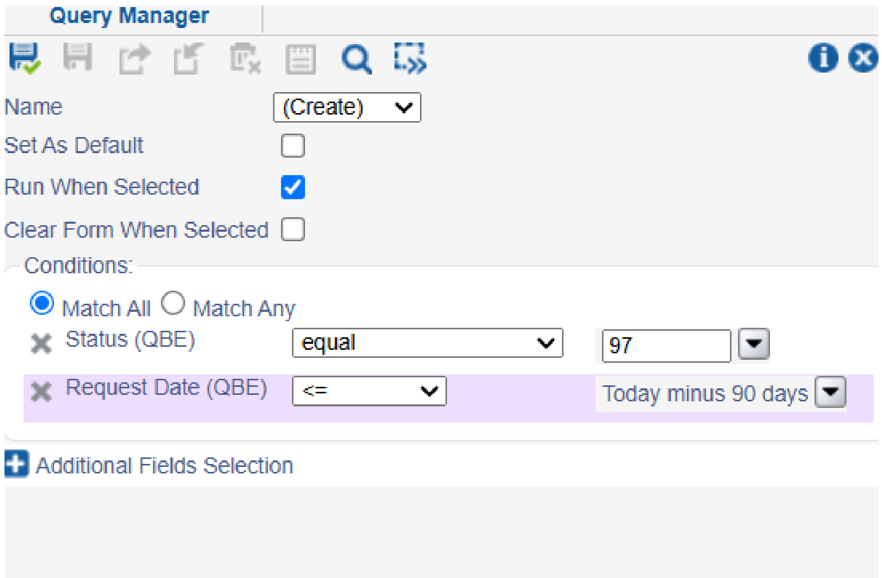
Step 2

Query some QBE values. Create a new inquiry

In this example, status code=97 is used since the demo environment didn't have exception codes.

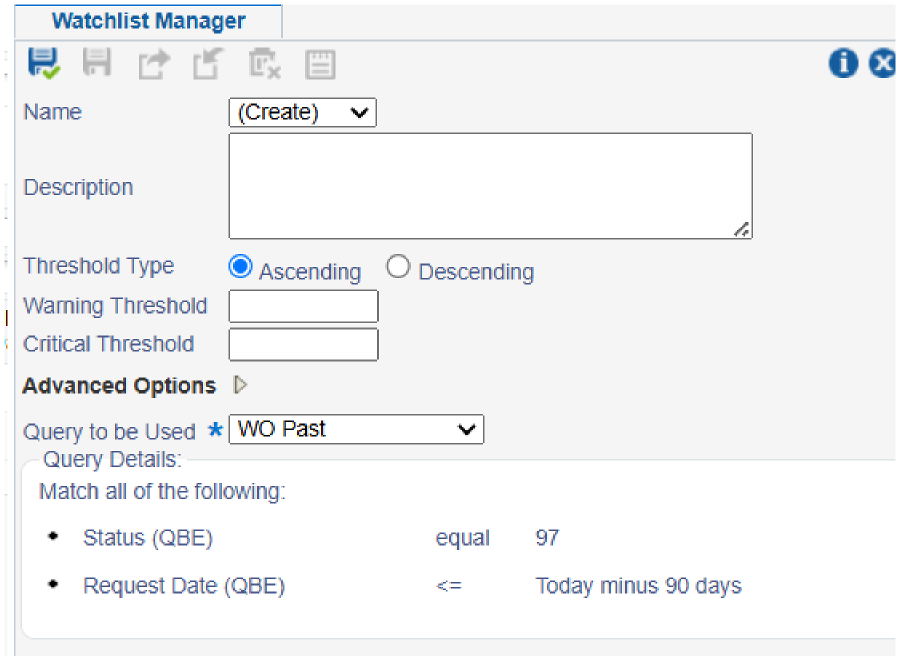


Right pane repeated for clarity view



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



NOTE: This is a very powerful watchlist which can be used in many different combinations.

As mentioned you can be creative for different exception status and have separate watch for different days range (30, 60, 90)

If you feel users are using various status codes without the process understanding (because JDE UDC value has them), plan to invoke Work order activity rules in the manufacturing constants. Like other order activity rules, users can’t enter their own UDC code if the flow is not in WO activity rules.

Work Order Scrap Quantity Surprises Alert

Business Requirement:

If you have defined specific scrap percentages in the bill of materials. However, during work order execution things change and usage goes up (typically). This pose surprises Planners using MRP and Buyers who thought everything was under control. An alert will help the supervisors.

This acts like an exception materials issues list which needs management attention. This query can be combined in a CAFE1 composite to know the entire Work order partslist and WO status.

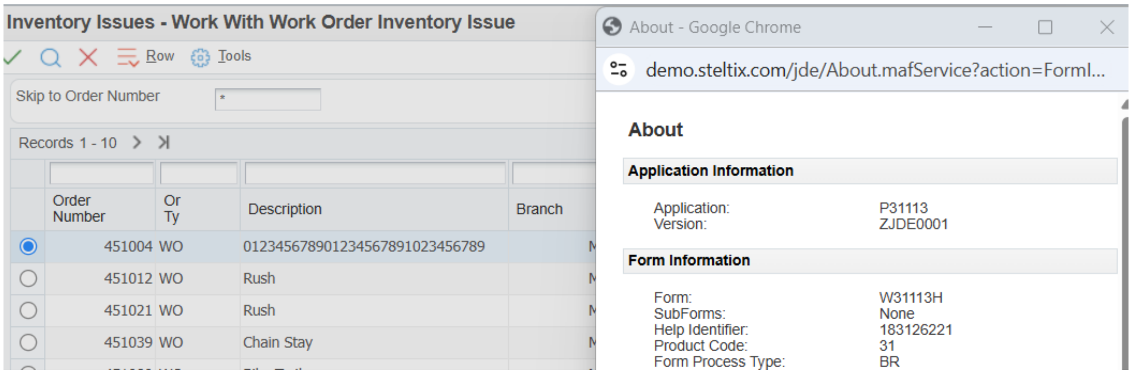
Technology used: Watch list

Limitations: None. Please check security granted to right roles

Table/Application Used: P31113

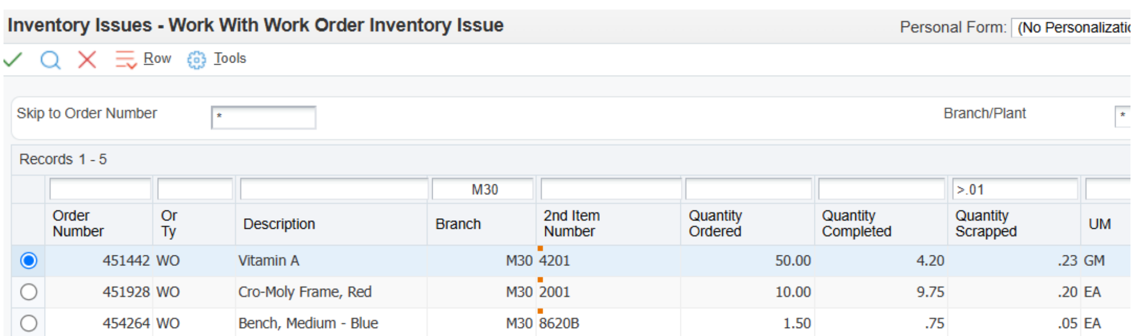
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

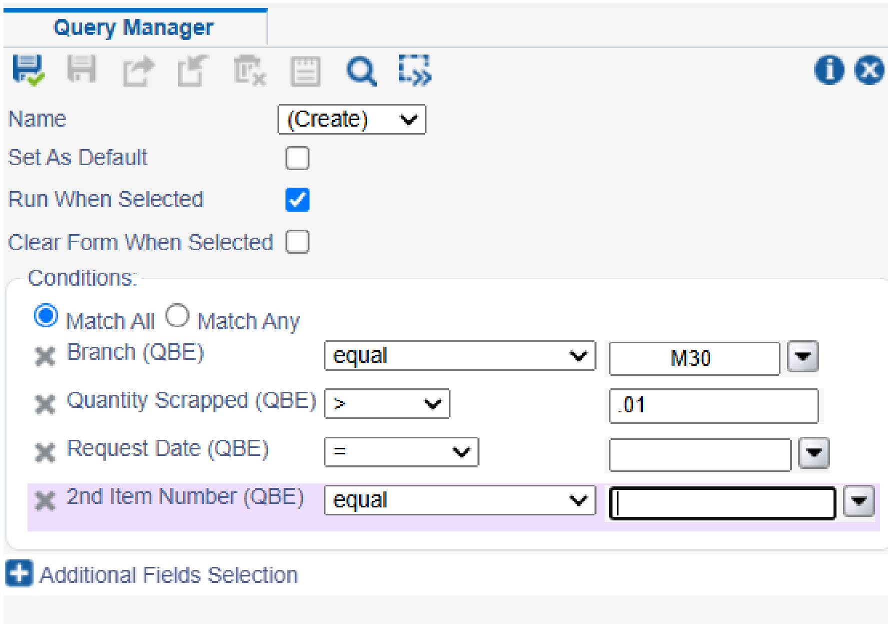
Customize the grid (example below), place some QBE values to get valid data points



Step 3

Create a new query. Use the right pane selections to start with.

You can focus on scrap quantity threshold (not necessarily >0.01), request date back dated 30 days behind and list problem components. This application does not have many fields/columns by default. You may need to add more grid customization to get values like WO status, WO parent item, etc.



Step 4

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage

Step 5

Go back to the main JDE screen. The watchlist will be generated. Press the refresh circle. When you click on the watchlist, the OneView sales inquiry will show up with the pre-configured data. You can modify the query (a) by providing more QBE values or (b) use the query drop down to go back to all records option if you feel the watchlist extract is incorrect.

Work order Variance B cost type threshold $ Alert

Business Requirement:

In a fast-moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn't work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can possibly be stopped with the change in processing option.

Work orders are getting completed and go to 95 (typically). Manufacturing accounting runs at periodic intervals. Scheduled jobs push the status to 96 or 97 based on the configurations/usage. Accountants look at the variance. For any problems, they may push back to 92 or any other accounting use only status.

However, these orders on hold status need to be reviewed at every month end for better bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

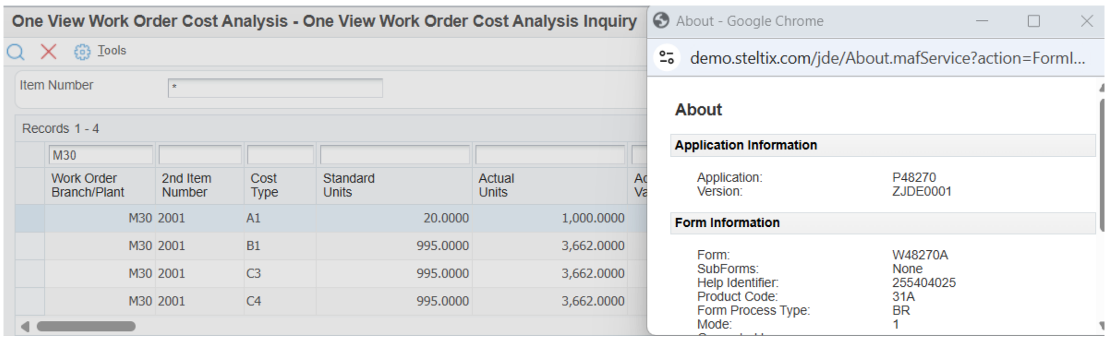
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48270

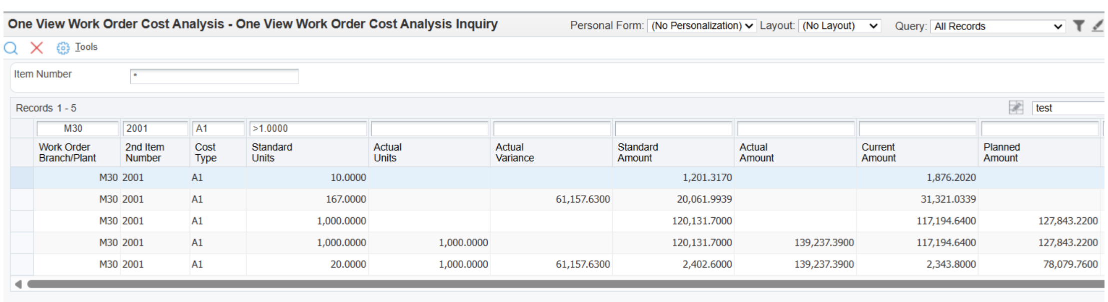
Step 1

Open One View WO cost analysis inquiry application

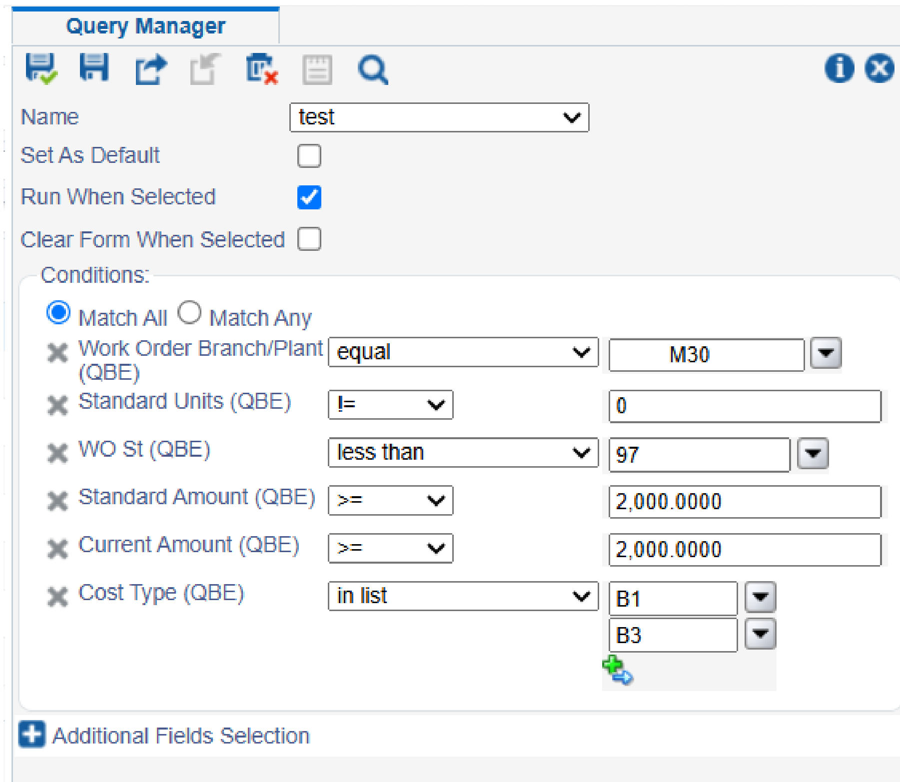


Step 2

Populate some QBE values and create a new query

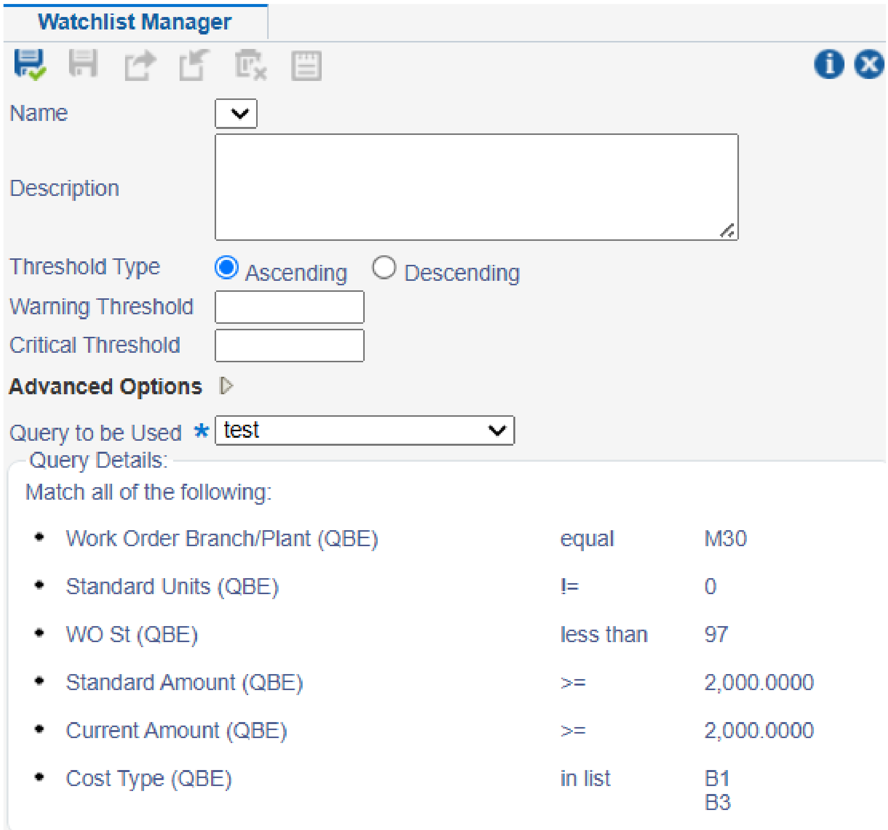


Bigger view of the query manager



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



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Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

Work order Variance C cost type threshold $ Alert

Business Requirement:

In a fast-moving manufacturing environment, the work order cycle is short and yet prone to errors. Users may double book the issues (if scanner didn't work first time) and also issue components against the wrong work orders. Typically companies enable additional material issues, which can possibly be stopped with the change in processing option.

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However, these orders on hold status need to be reviewed at every month end for better bookkeeping purposes. You don't want to book the next months or many months after regular transactions have happened.

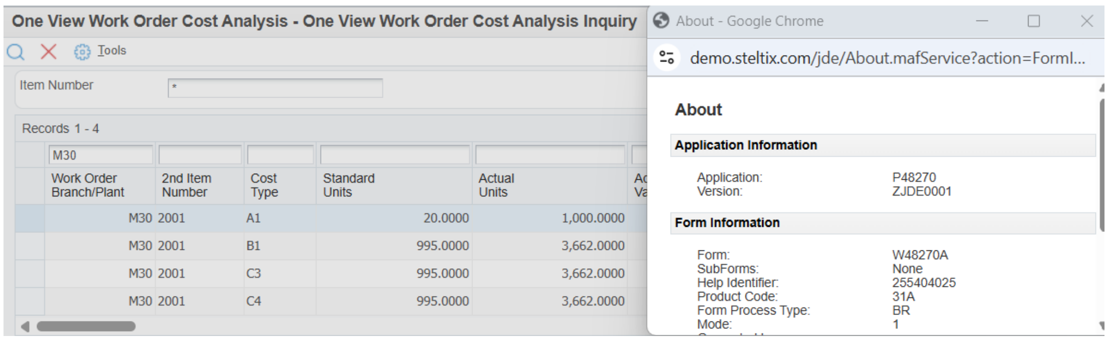
Technology used: UDO watchlist.

Limitations: Ensure you have security access to running this application

Table/Application Used: P48270

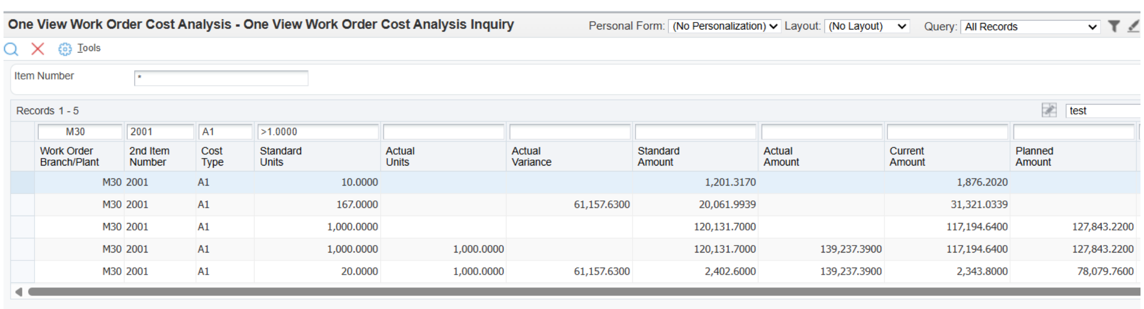
Step 1

Open One View WO cost analysis inquiry application

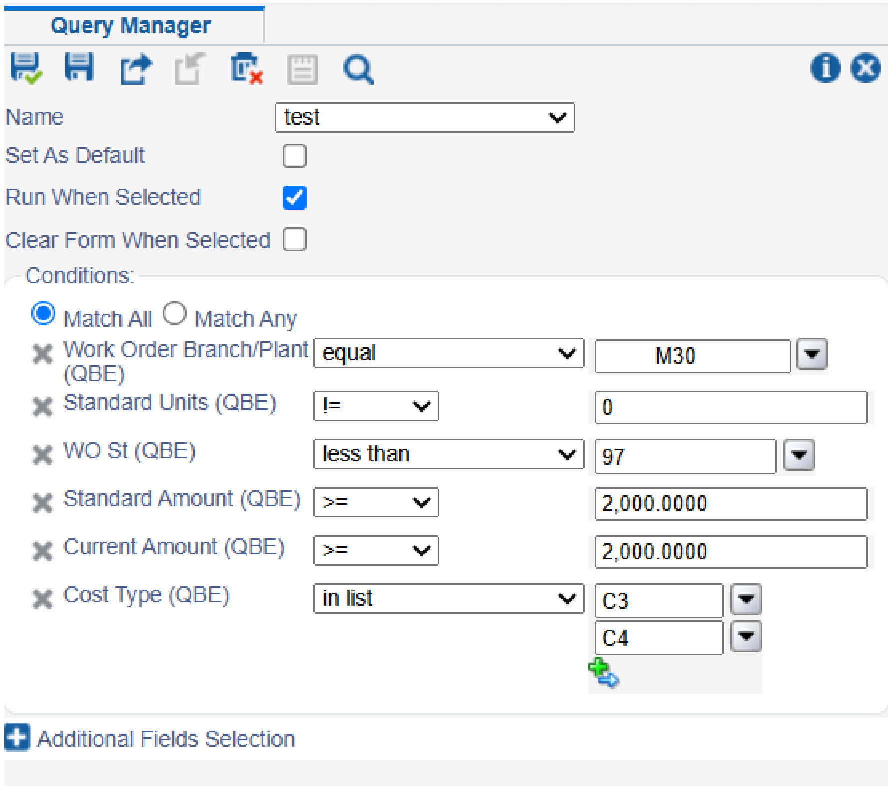


Step 2

Populate some QBE values and create a new query

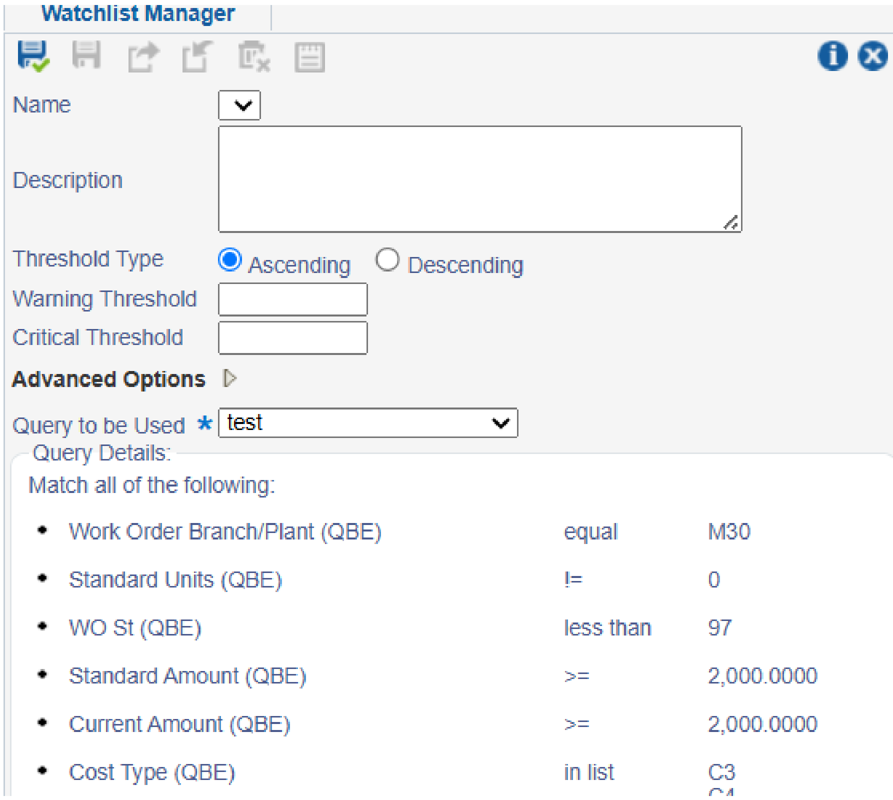


Bigger view of the query manager



Step 3

Create a new watch list. Use the previously generated query. On the description box, provide more clarity so that any other user can modify this at a later stage



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Standard units, actual units, actual variance at different threshold levels

Standard units, planning units, planned variance at different levels

Similar concept for $ values

It is important manufacturing accounting job run at regular scheduler intervals and not dependent on a user to run it.

CAFE1 Purchasing Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are trying purchase order inquiry with Supply & demand inquiry

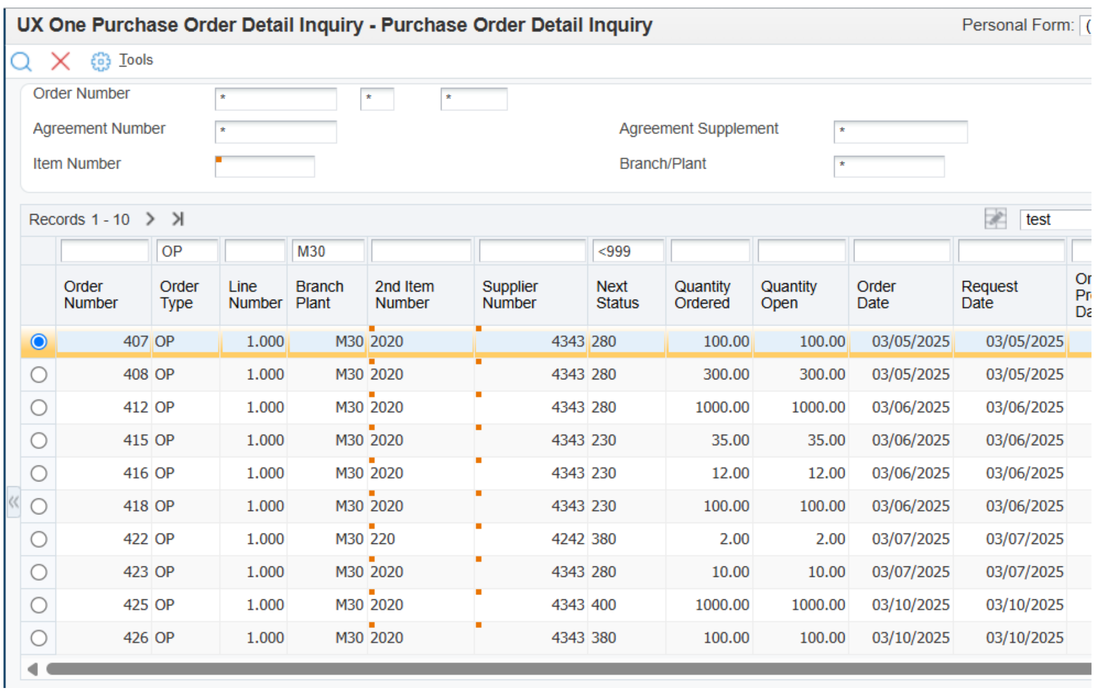
Technology used: UDO CAFE1.

Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: Ux One Purchase Order detail inquiry

Step 1

Open Ux One Purchase Order detail inquiry. Enter QBE values to filter and get sample data. Reformat the grid and/or complete grid extension sessions.


UX One Purchase Order Detail Inquiry - Purchase Order Detail Inquiry

Personal Form:

Tools

Order Number * * *

Agreement Number * Agreement Supplement *

Item Number Branch/Plant *

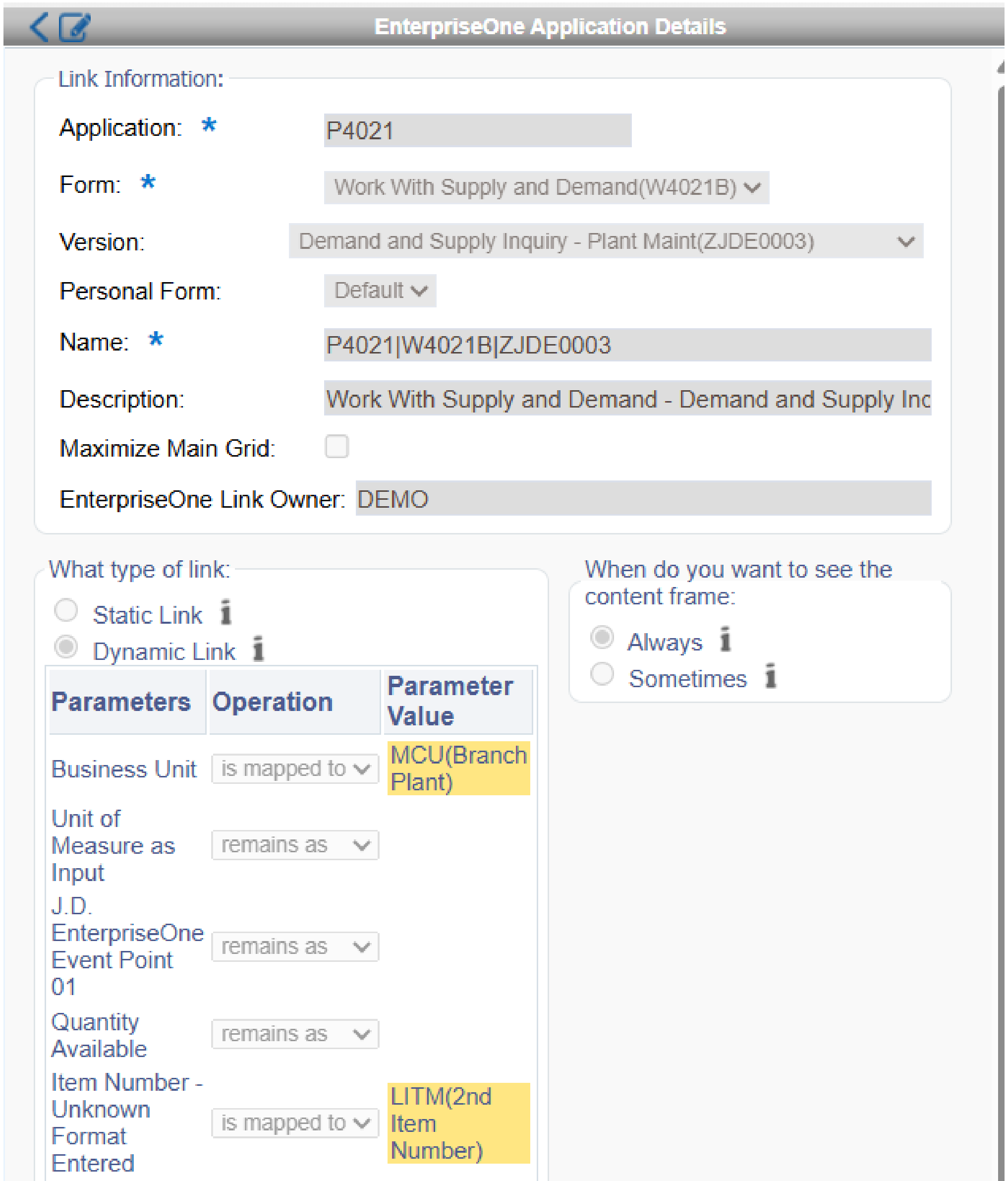
Records 1 - 10

test

Order Number	Order Type	Line Number	Branch Plant	2nd Item Number	Supplier Number	Next Status	Quantity Ordered	Quantity Open	Order Date	Request Date
	OP		M30			<999				
407	OP	1.000	M30	2020	4343	280	100.00	100.00	03/05/2025	03/05/2025
408	OP	1.000	M30	2020	4343	280	300.00	300.00	03/05/2025	03/05/2025
412	OP	1.000	M30	2020	4343	280	1000.00	1000.00	03/06/2025	03/06/2025
415	OP	1.000	M30	2020	4343	230	35.00	35.00	03/06/2025	03/06/2025
416	OP	1.000	M30	2020	4343	230	12.00	12.00	03/06/2025	03/06/2025
418	OP	1.000	M30	2020	4343	230	100.00	100.00	03/06/2025	03/06/2025
422	OP	1.000	M30	220	4242	380	2.00	2.00	03/07/2025	03/07/2025
423	OP	1.000	M30	2020	4343	280	10.00	10.00	03/07/2025	03/07/2025
425	OP	1.000	M30	2020	4343	400	1000.00	1000.00	03/10/2025	03/10/2025
426	OP	1.000	M30	2020	4343	380	100.00	100.00	03/10/2025	03/10/2025

Step 2

Start CAFE1 process of adding another application to the right pane

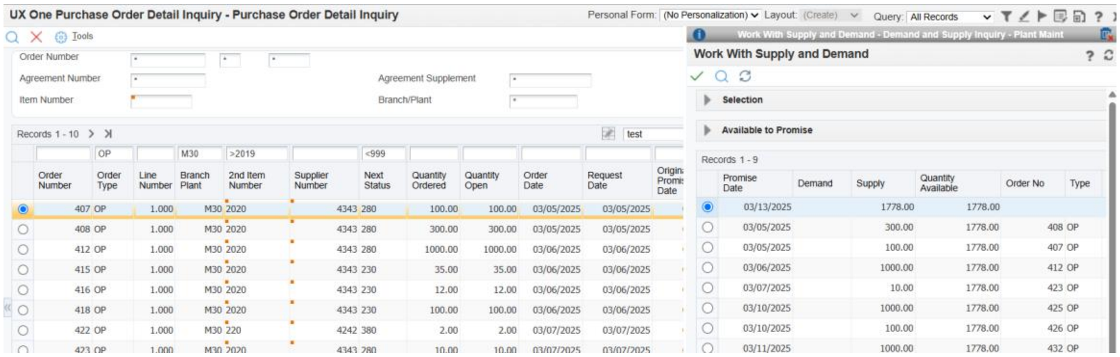


Step 3

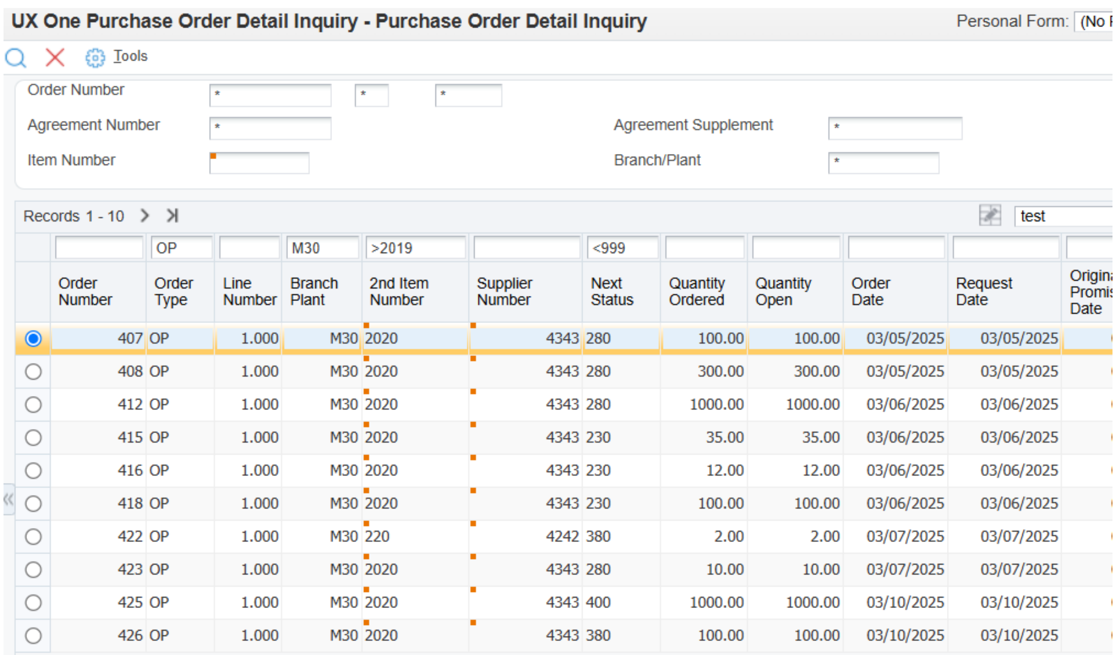
Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

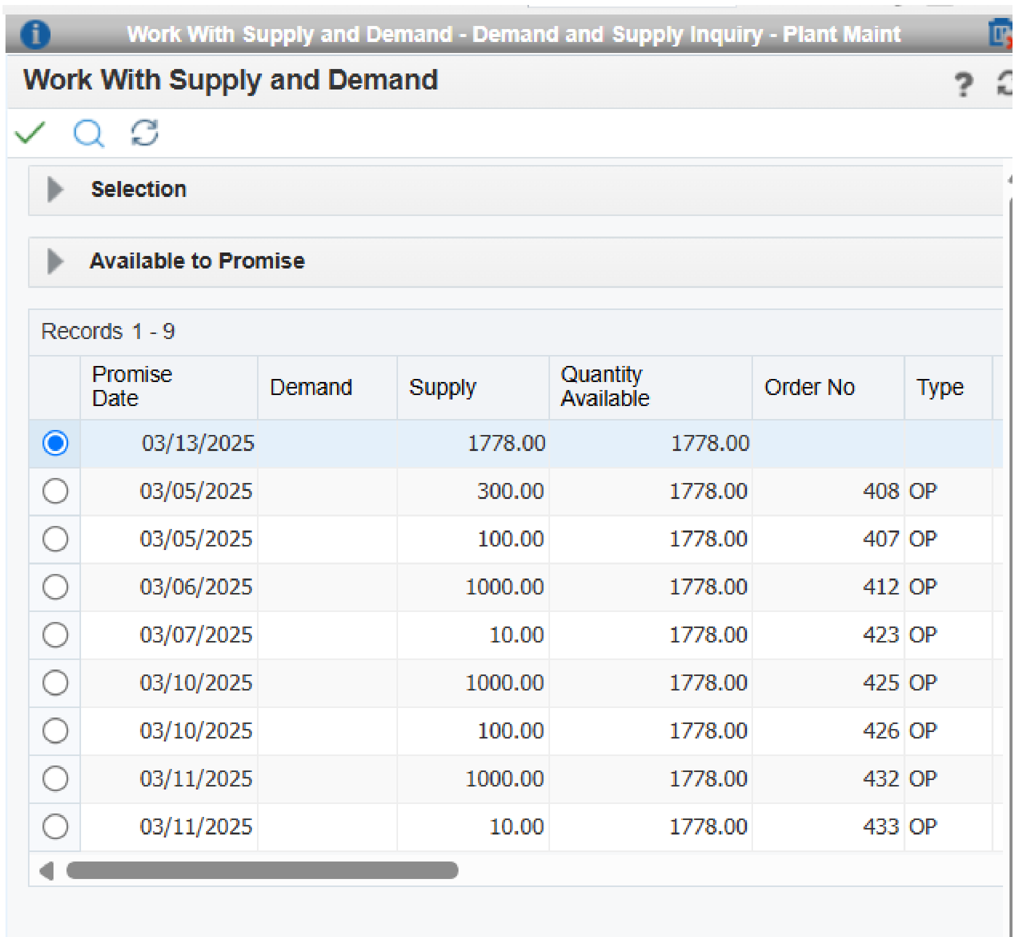
Ask IT for deployment and promotion to PD.



Split view of the left pane



Split view of the right pane



CAFE1 Workorder Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in work order cost variance coming from std vs actual quantity usage. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying work order cost variance to the work order entry so that you can quickly inquire WO parts lists consumed and WO routing consumed data.

Technology used: UDO CAFE1.

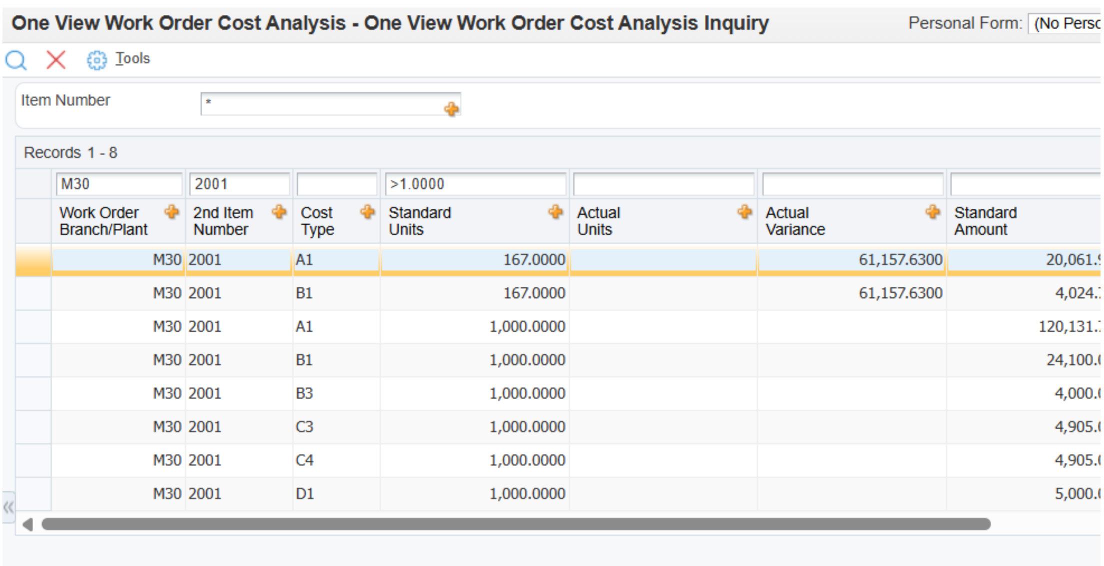
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: One View Work order cost analysis inquiry

Step 1

Open One View Work order cost analysis inquiry

Enter QBE values to filter and get sample data. Reformat the grid and/or complete grid extension sessions.


One View Work Order Cost Analysis - One View Work Order Cost Analysis Inquiry

Personal Form: (No Perso

Tools

Item Number *

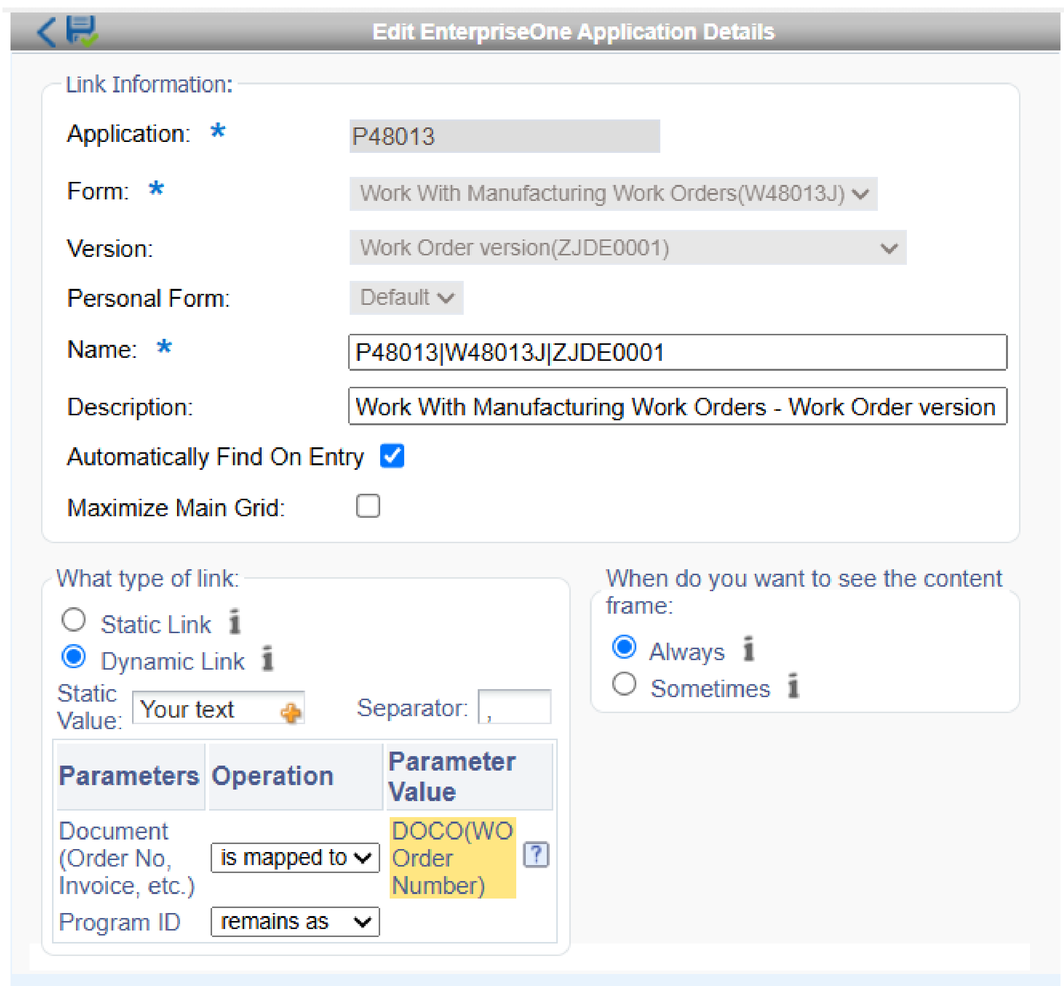
Records 1 - 8

Work Order Branch/Plant	2nd Item Number	Cost Type	Standard Units	Actual Units	Actual Variance	Standard Amount
M30	2001		>1.0000			
M30	2001	A1	167.0000		61,157.6300	20,061.9
M30	2001	B1	167.0000		61,157.6300	4,024.1
M30	2001	A1	1,000.0000			120,131.1
M30	2001	B1	1,000.0000			24,100.0
M30	2001	B3	1,000.0000			4,000.0
M30	2001	C3	1,000.0000			4,905.0
M30	2001	C4	1,000.0000			4,905.0
M30	2001	D1	1,000.0000			5,000.0

Step 2

Start CAFE1 process of adding another application to the right pane

You can also use different form names (instead of W48013J) to get different cafe1 views

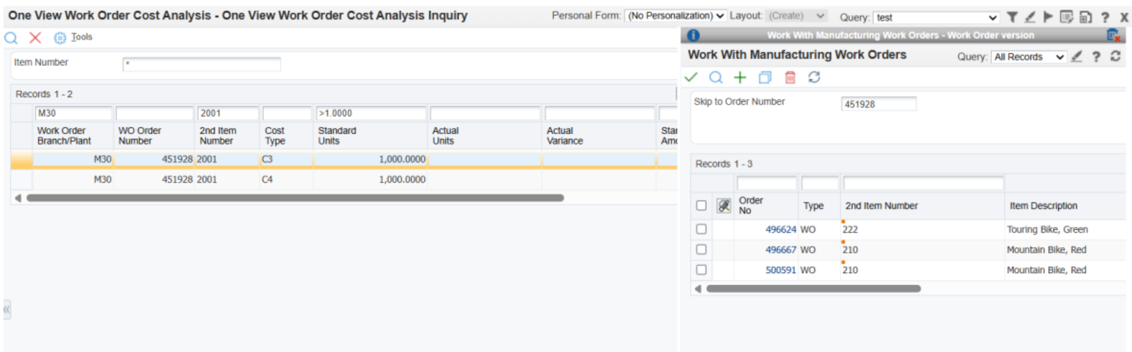


Step 3

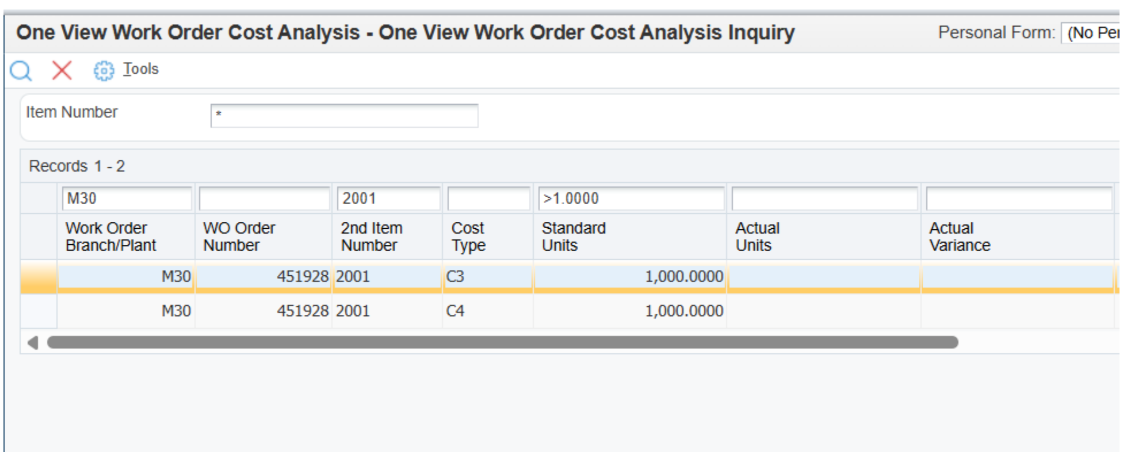
Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

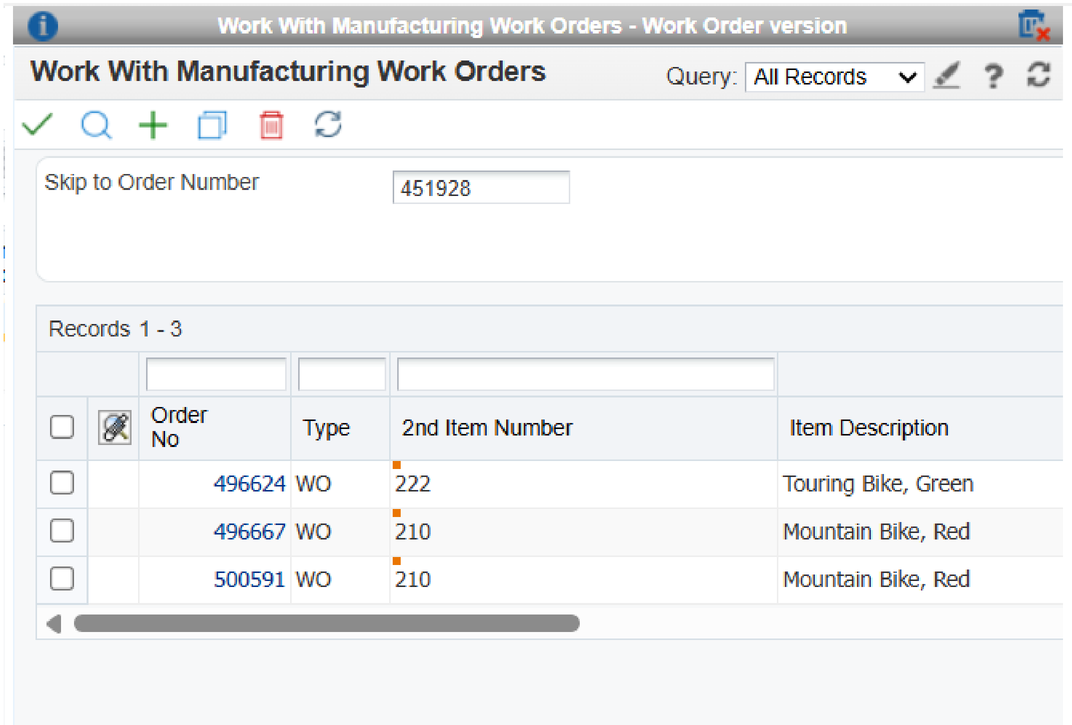
Ask IT for deployment and promotion to PD.



Split view of the left pane



Split view of the right pane



CAFE1 Item Branch Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying item branch data to planning data and also quantities tab data. Users need not select each row manually and go to row exit for every query.

Technology used: UDO CAFE1.

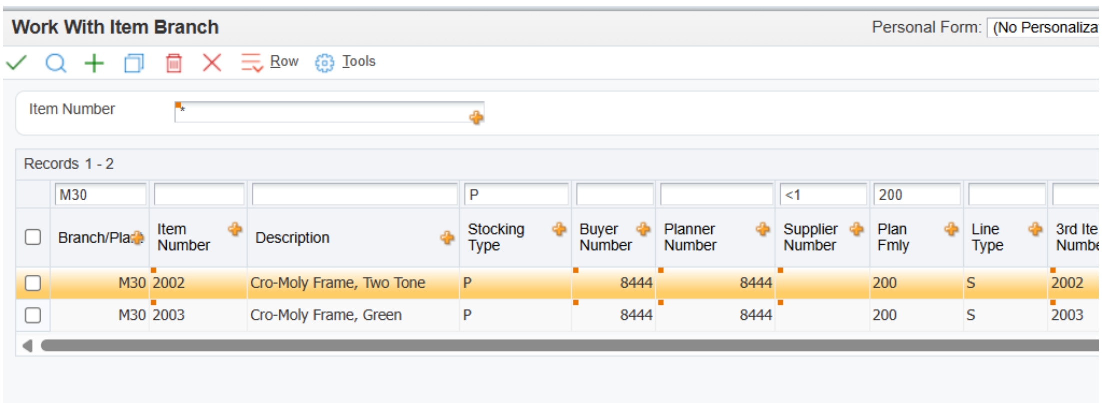
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: P41026 Item Branch application

Step 1

Open Item Branch application

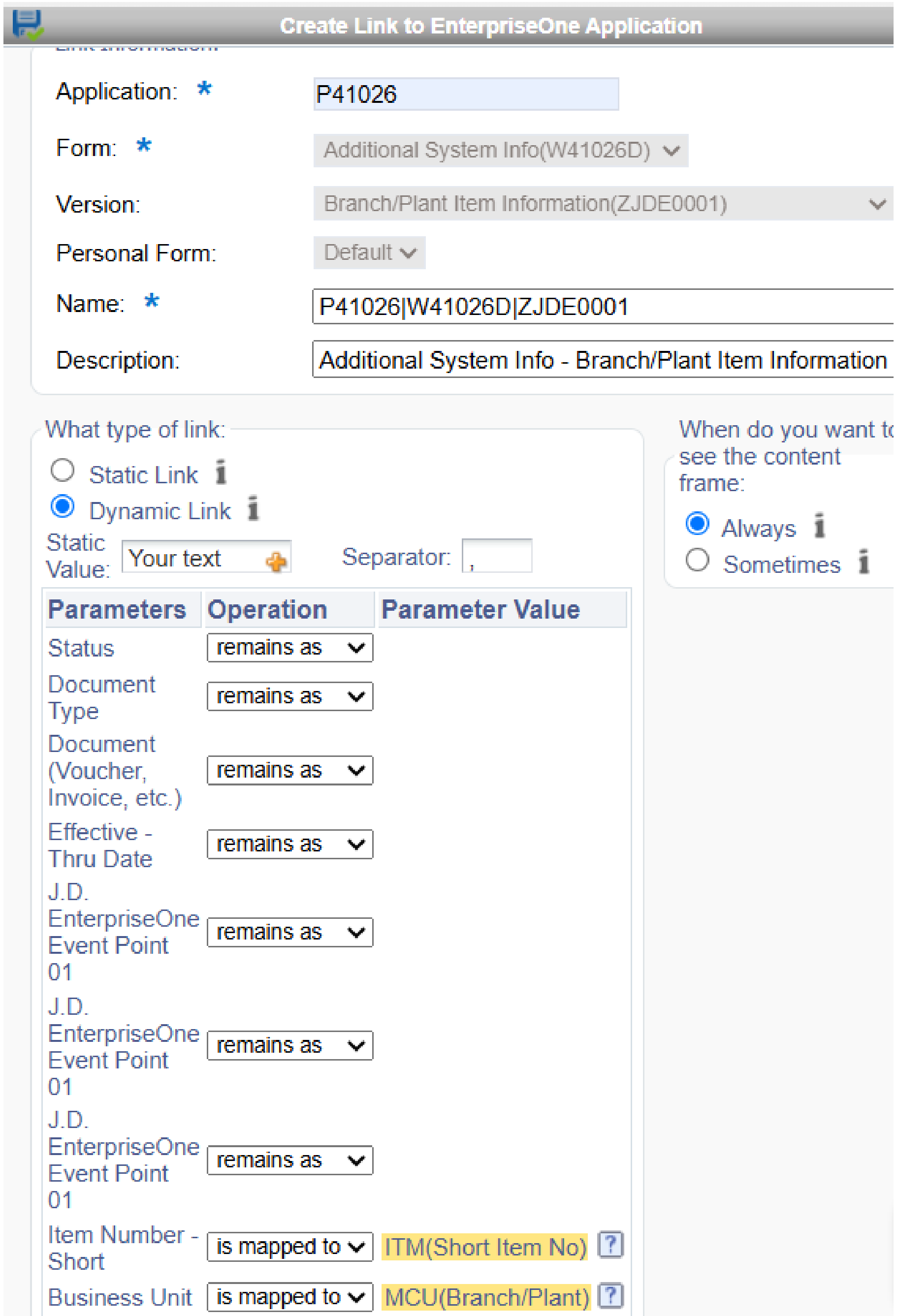
Enter QBE values to filter and get sample data. Reformat the grid and/or complete grid extension sessions.

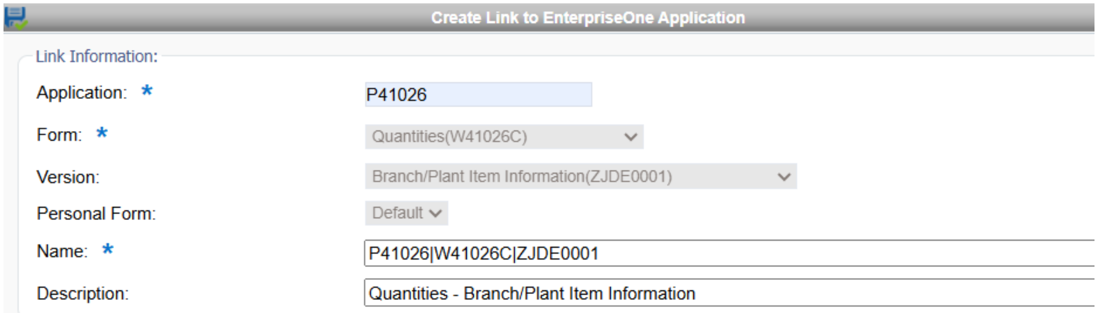


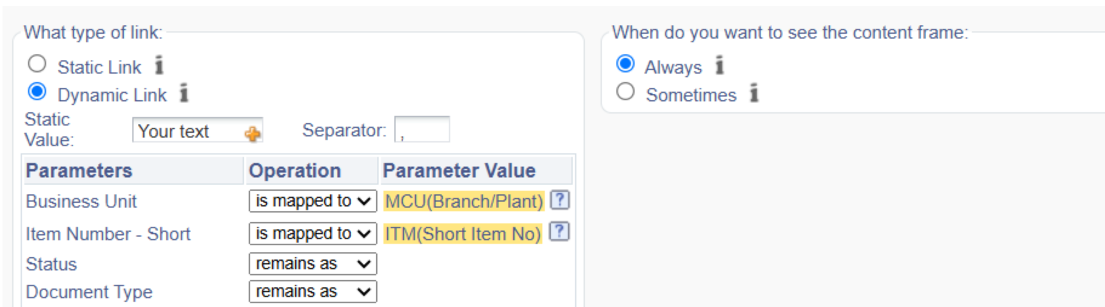
Step 2

Start CAFE1 process of adding another application to the right pane

You can also use different form names to get append composite application view


Create Link to EnterpriseOne Application
Application: *
P41026
Form: *
Additional System Info(W41026D)
Version:
Branch/Plant Item Information(ZJDE0001)
Personal Form:
Default
Name: *
P41026|W41026D|ZJDE0001
Description:
Additional System Info - Branch/Plant Item Information
What type of link:
Static Link
Dynamic Link
Static Value:
Your text
Separator:
When do you want to see the content frame:
Always
Sometimes
Parameters
Operation
Parameter Value
Status
remains as
Document Type
remains as
Document (Voucher, Invoice, etc.)
remains as
Effective - Thru Date
remains as
J.D. EnterpriseOne Event Point 01
remains as
J.D. EnterpriseOne Event Point 01
remains as
J.D. EnterpriseOne Event Point 01
remains as
Item Number - Short
is mapped to
ITM(Short Item No)
Business Unit
is mapped to
MCU(Branch/Plant)


Create Link to EnterpriseOne Application
Link Information:
Application: *
P41026
Form: *
Quantities(W41026C)
Version:
Branch/Plant Item Information(ZJDE0001)
Personal Form:
Default
Name: *
P41026|W41026C|ZJDE0001
Description:
Quantities - Branch/Plant Item Information

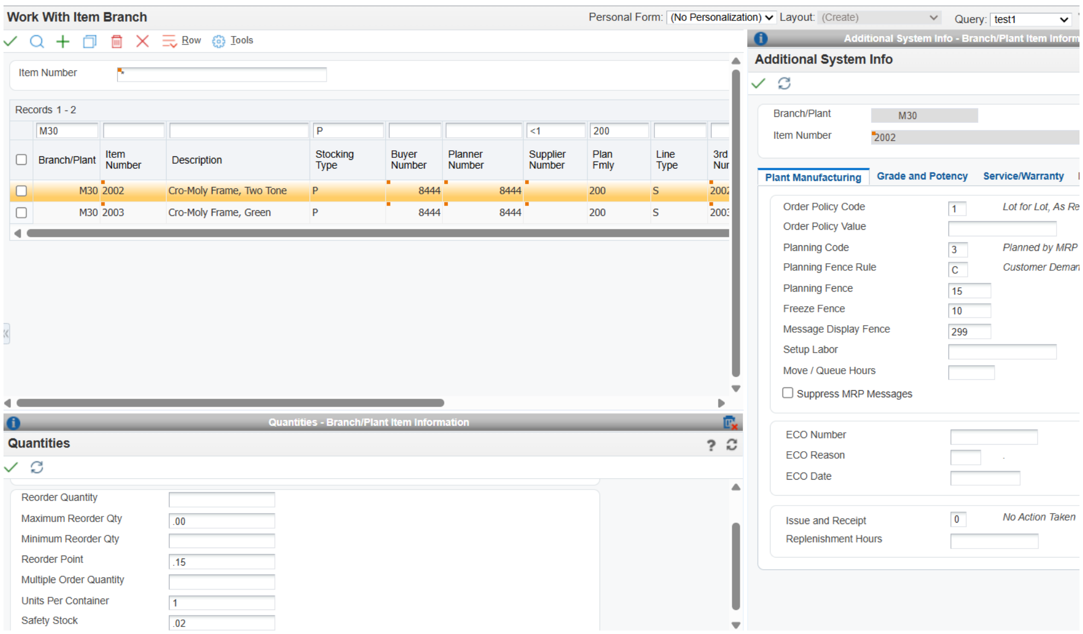

What type of link:
Static Link
Dynamic Link
Static Value:
Your text
Separator:
,
Parameters
Operation
Parameter Value
Business Unit
is mapped to
MCU(Branch/Plant)
Item Number - Short
is mapped to
ITM(Short Item No)
Status
remains as
Document Type
remains as
When do you want to see the content frame:
Always
Sometimes

Step 3

Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



CAFE1 MRP Review Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are trying MRP message review application with S&D inquiry & item availability. If a user wants to release purchase order OR workorder, he/she can get the total picture in one CAFE1 application. This saves time in switching back to different applications and entering the SKU number(s) again and again.

Technology used: UDO CAFE1.

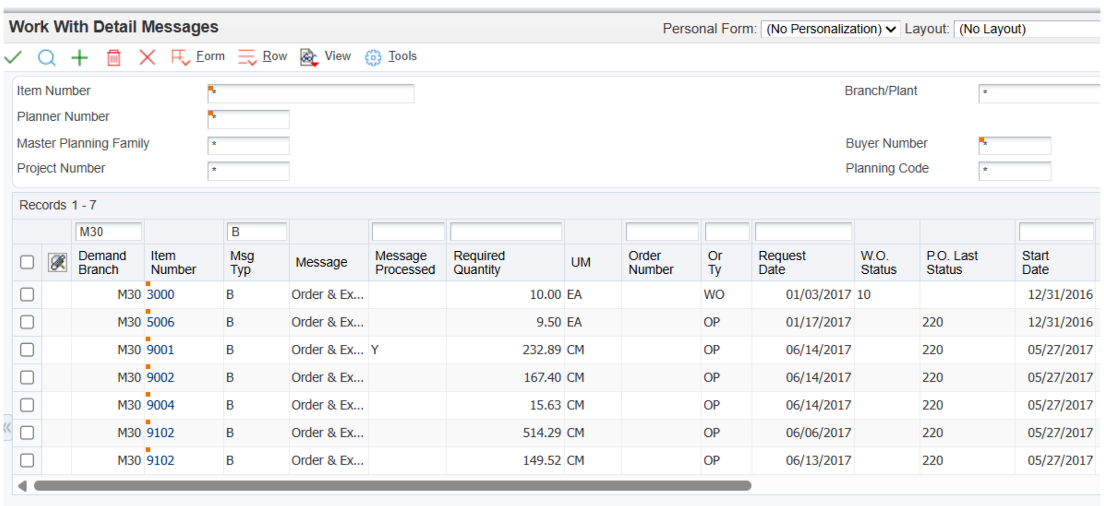
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: P3411 MRP Message Review Application

Step 1

Open MRP Message Review application

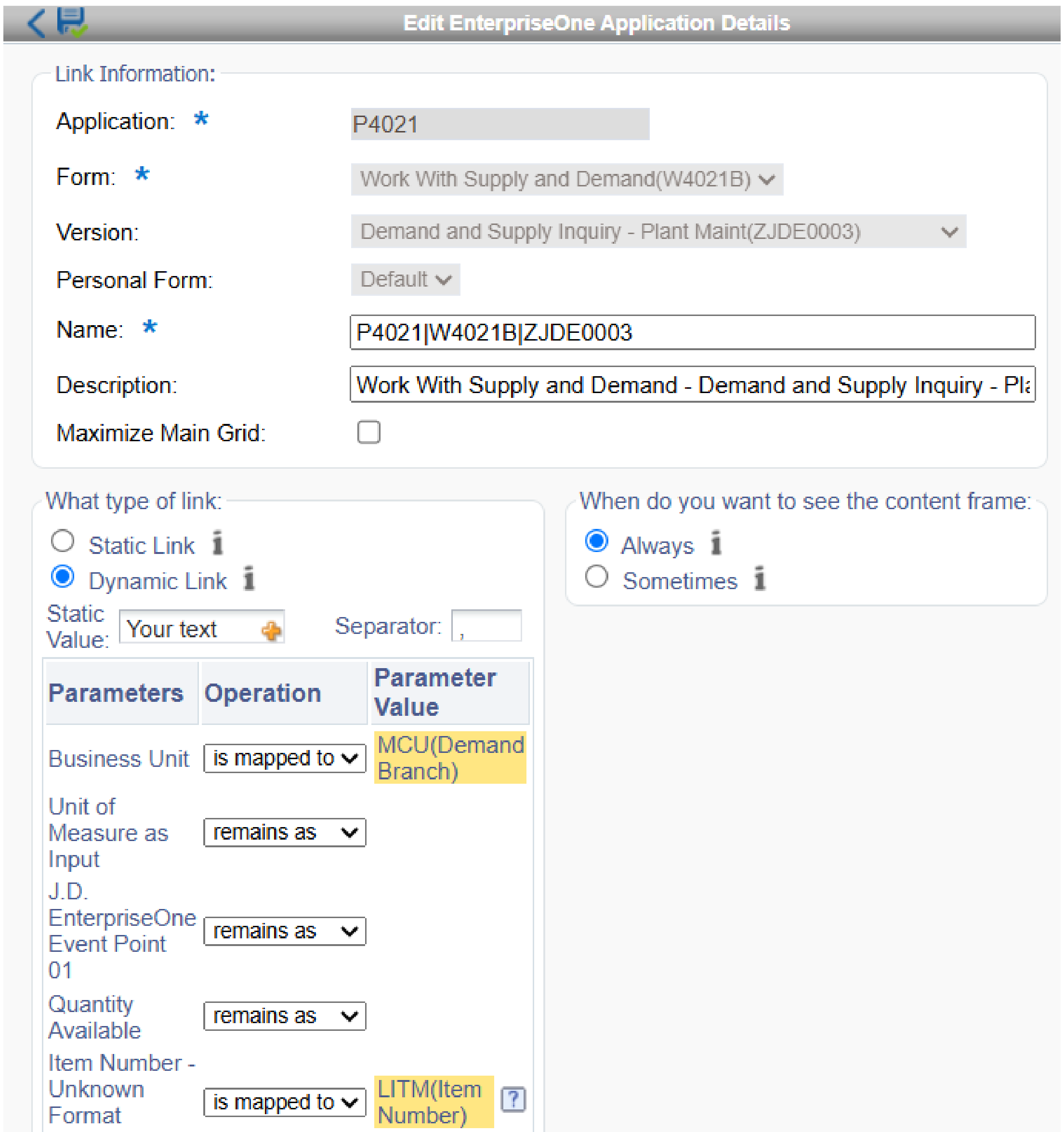
Enter QBE values to filter and get sample data. Reformat the grid and/or complete grid extension sessions.



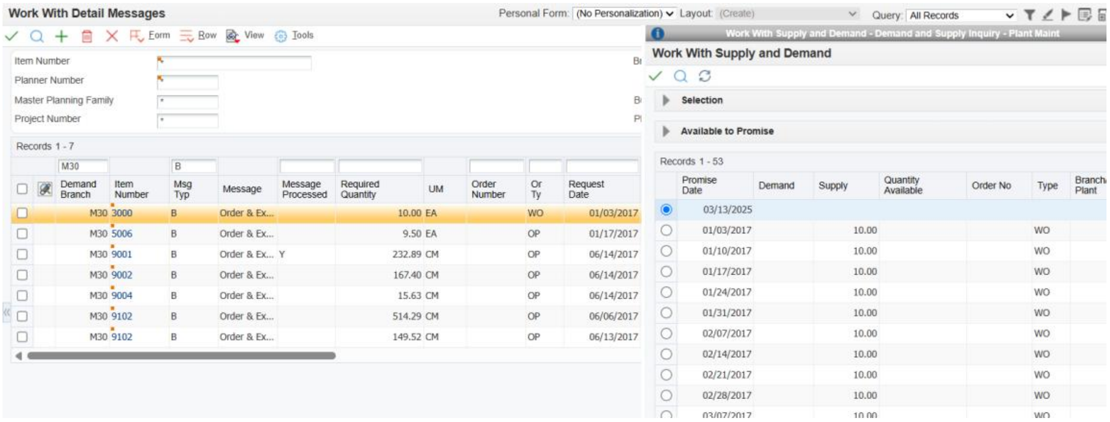
Step 2

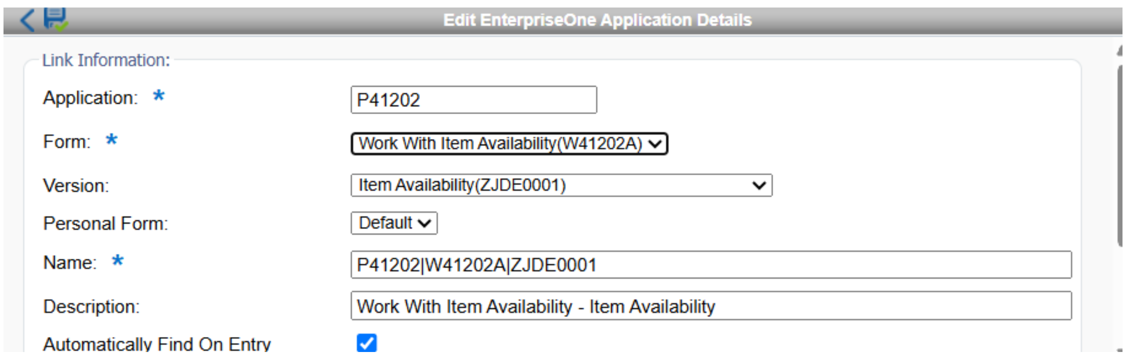
Start CAFE1 process of adding another application to the right pane

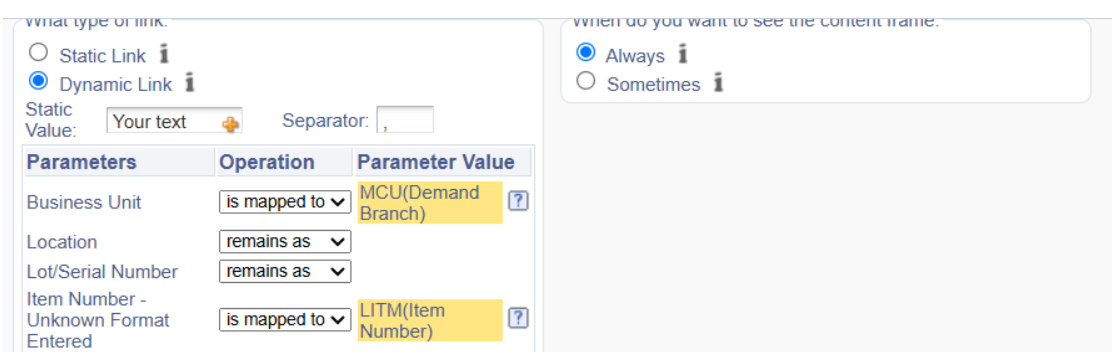
You can also use different form names to get append composite application view



Add additional applications.


Work With Detail Messages
Personal Form: (No Personalization)
Layout: (Create)
Query: All Records
Form
Row
View
Tools
Item Number
Planner Number
Master Planning Family
Project Number
Records 1 - 7
Demand Branch
Item Number
Msg Typ
Message
Message Processed
Required Quantity
UM
Order Number
Or Ty
Request Date
Work With Supply and Demand - Demand and Supply Inquiry - Plant Maint
Work With Supply and Demand
Selection
Available to Promise
Records 1 - 53
Promise Date
Demand
Supply
Quantity Available
Order No
Type
Branch Plant


Edit EnterpriseOne Application Details
Link Information:
Application: *
P41202
Form: *
Work With Item Availability(W41202A)
Version:
Item Availability(ZJDE0001)
Personal Form:
Default
Name: *
P41202|W41202A|ZJDE0001
Description:
Work With Item Availability - Item Availability
Automatically Find On Entry

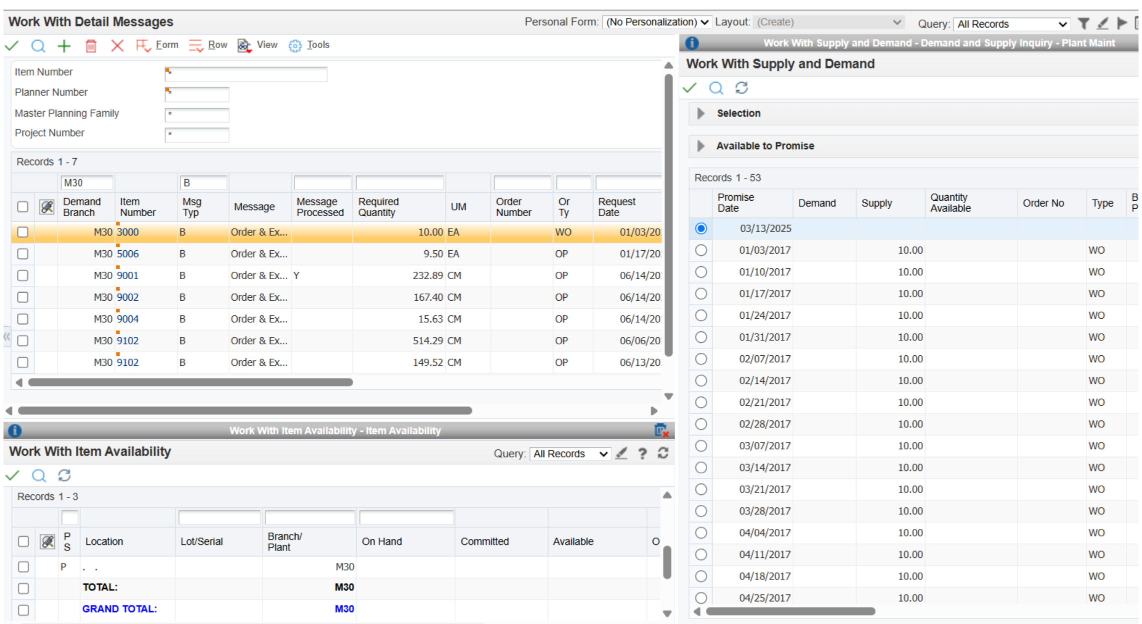

Static Link
Dynamic Link
Static Value:
Your text
Separator:
Always
Sometimes
Parameters
Operation
Parameter Value
Business Unit
is mapped to
MCU(Demand Branch)
Location
remains as
Lot/Serial Number
remains as
Item Number - Unknown Format Entered
is mapped to
LITM(Item Number)

Step 3

Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



CAFE1 Sales Orders Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying sales order review application with S&D inquiry & item availability. If a user wants to process sales orders into pick/pack, he/she can get the total picture in one CAFE1 application. This saves time in switching back to different applications and entering the SKU number(s) again and again.

Technology used: UDO CAFE1.

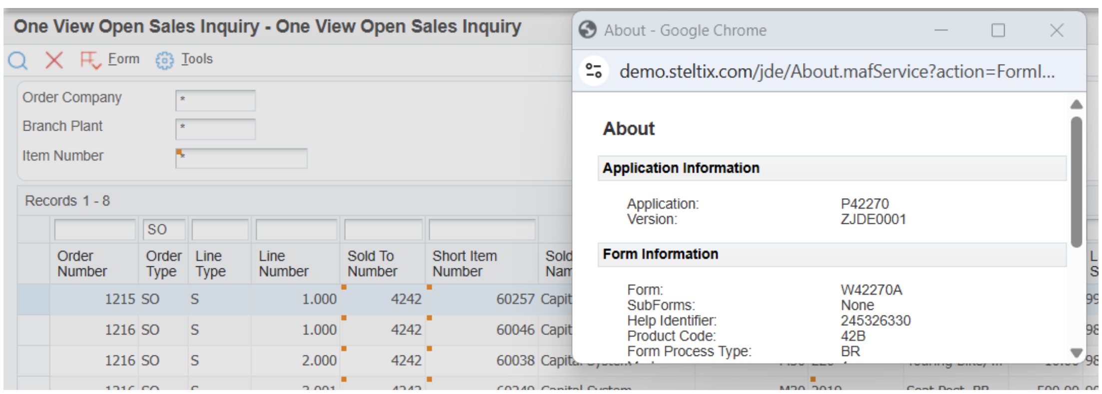
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

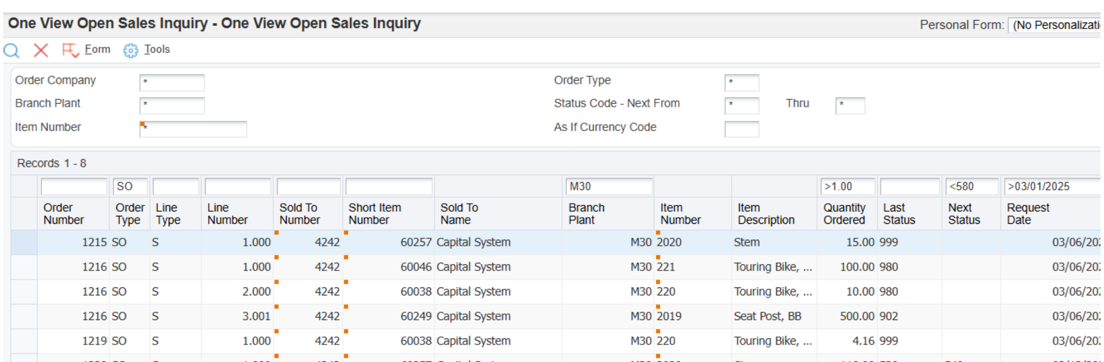
Table/Application Used: One View Open Sales Inquiry

Step 1

Open One View Open Sales Inquiry

Enter QBE values to filter and get sample data. Reformat the grid and/or complete grid extension sessions.

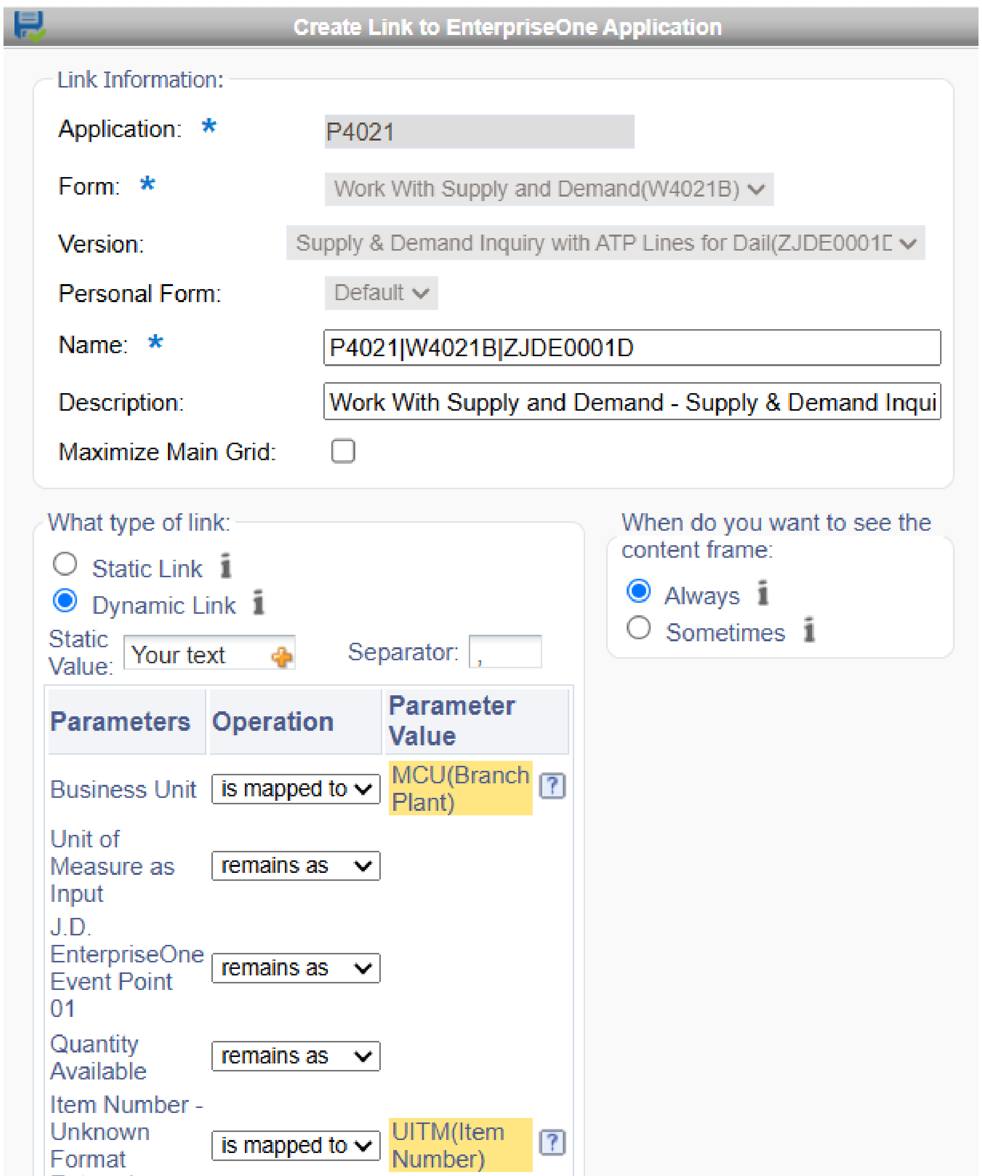


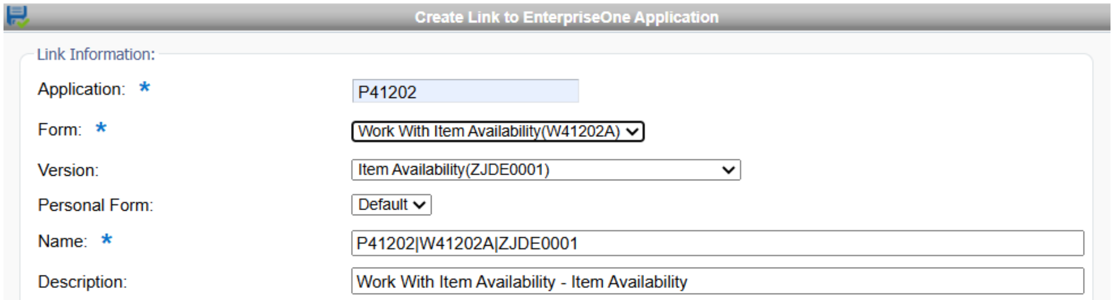


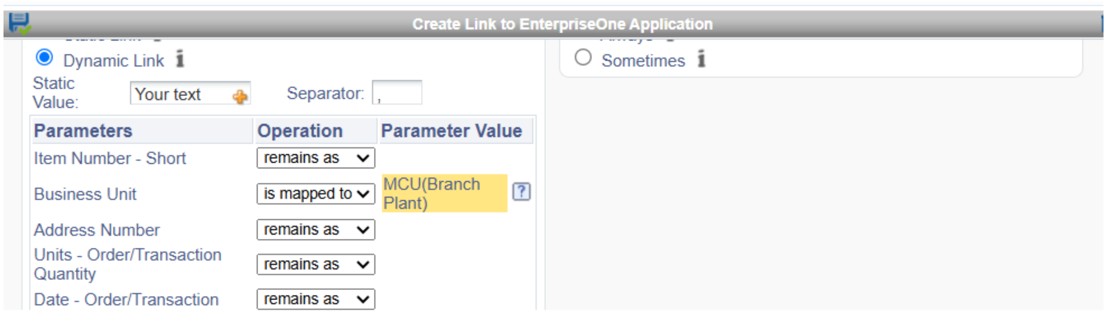
Step 2

Start CAFE1 process of adding another application to the right pane

You can also use different form names to get append composite application view




Create Link to EnterpriseOne Application
Link Information:
Application: *
P41202
Form: *
Work With Item Availability(W41202A)
Version:
Item Availability(ZJDE0001)
Personal Form:
Default
Name: *
P41202|W41202A|ZJDE0001
Description:
Work With Item Availability - Item Availability

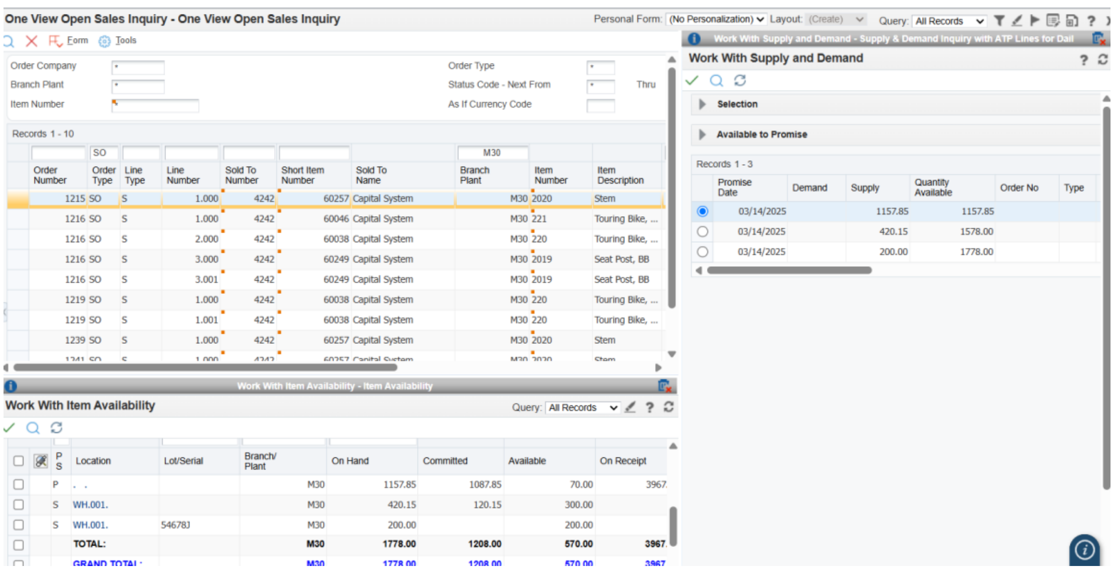

Create Link to EnterpriseOne Application
Dynamic Link
Sometimes
Static Value:
Your text
Separator:
Parameters
Operation
Parameter Value
Item Number - Short
remains as
Business Unit
is mapped to
MCU(Branch Plant)
Address Number
remains as
Units - Order/Transaction Quantity
remains as
Date - Order/Transaction
remains as

Step 3

Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



CAFE1 Item UOM Composite

Business Requirement:

CAFE1 is a powerful JDE UDO tool to build composite applications talking to each other's applications. Useful in quick data review as in item branch master data review to complex decision-making processes like whether to process MRP messages or not. Also useful in management review and S & OP (Sales and operations planning) review sessions. You can prebuild the queries and bring up the CAFE1 application in the group sessions to review data points.

In this example we are tying item branch application with uom screen in item master combined with UOM conversions and regular UOM standard conversion, he/she can get the total picture in one CAFE1 application. This saves time in switching back to different applications and entering the SKU number(s) again and again. **Also important in troubleshooting if the transaction fails due to lack of correct uom conversion factor under that specific branch.**

Technology used: UDO CAFE1.

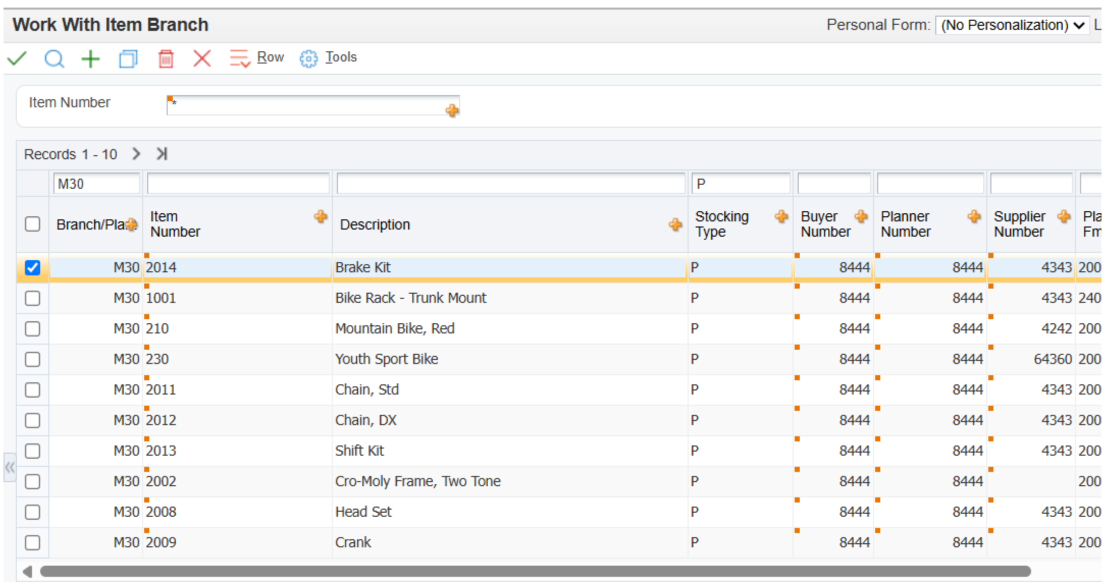
Limitations: Ensure you have security access to generate the CAFE1 UDOs.

Table/Application Used: One View Open Sales Inquiry

Step 1

Open Item branch application

Enter QBE values to filter and get sample data. Reformat the grid and/or complete grid extension sessions.

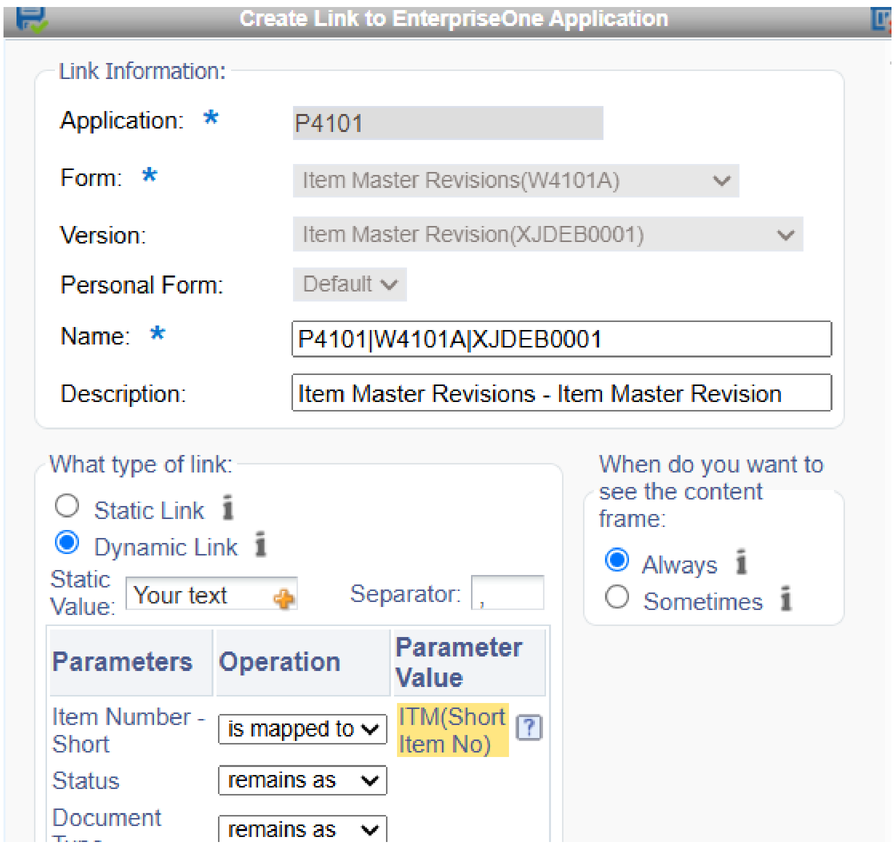


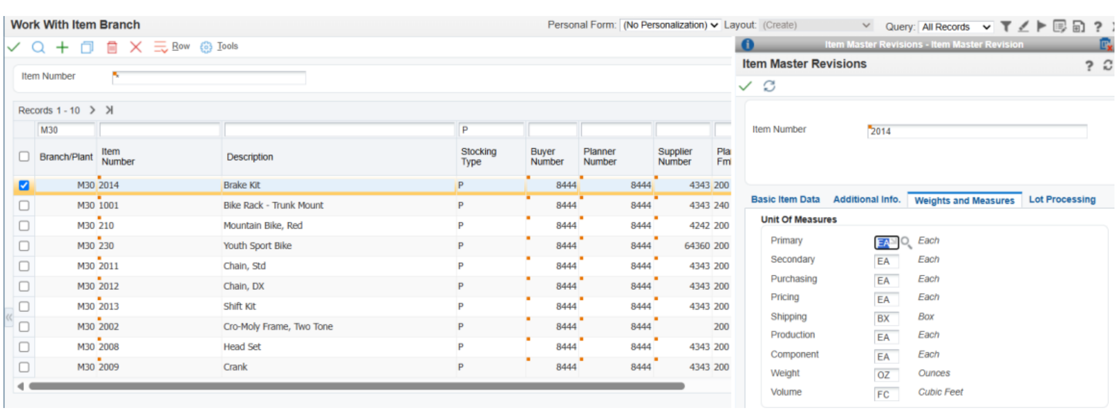
	Branch/Pla	Item Number	Description	Stocking Type	Buyer Number	Planner Number	Supplier Number	Pla Fm
☑	M30	2014	Brake Kit	P	8444	8444	4343	200
☐	M30	1001	Bike Rack - Trunk Mount	P	8444	8444	4343	240
☐	M30	210	Mountain Bike, Red	P	8444	8444	4242	200
☐	M30	230	Youth Sport Bike	P	8444	8444	64360	200
☐	M30	2011	Chain, Std	P	8444	8444	4343	200
☐	M30	2012	Chain, DX	P	8444	8444	4343	200
☐	M30	2013	Shift Kit	P	8444	8444	4343	200
☐	M30	2002	Cro-Moly Frame, Two Tone	P	8444	8444		200
☐	M30	2008	Head Set	P	8444	8444	4343	200
☐	M30	2009	Crank	P	8444	8444	4343	200

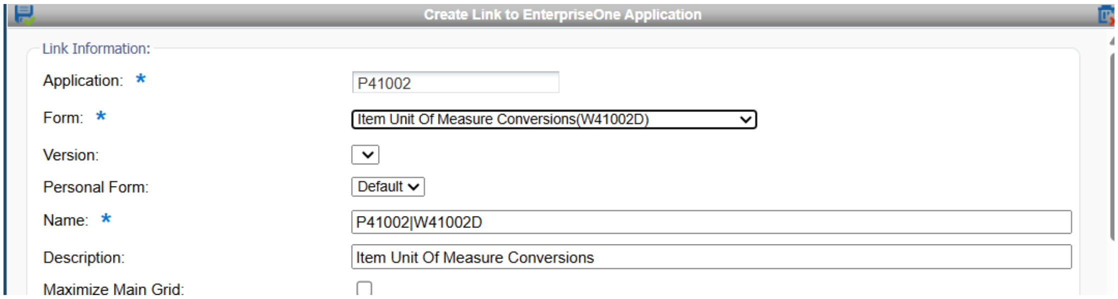
Step 2

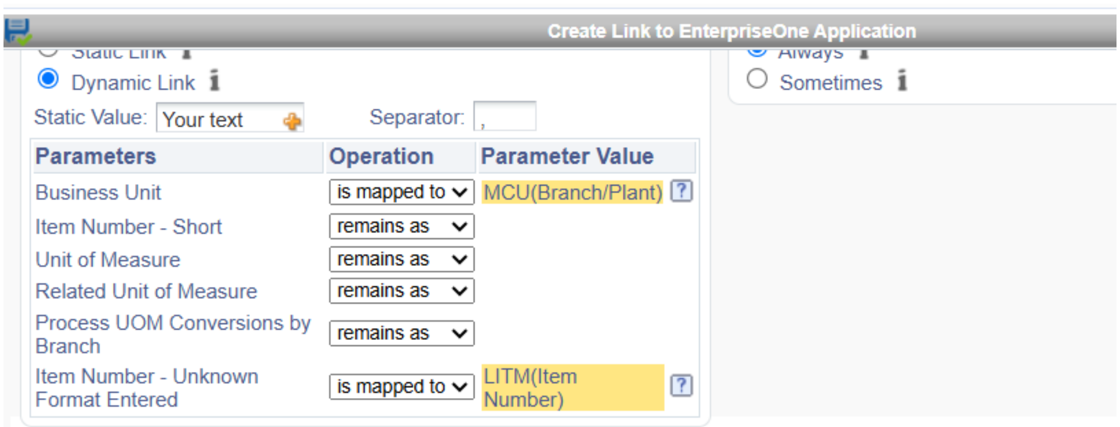
Start CAFE1 process of adding another application to the right pane

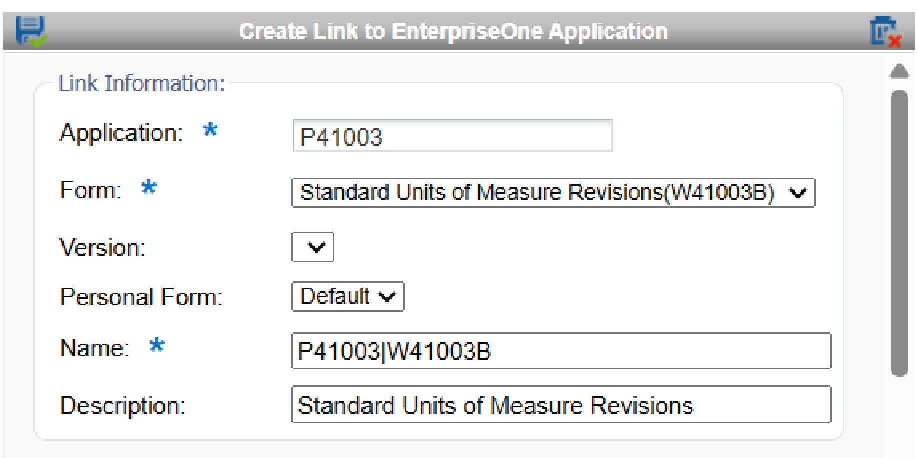
You can also use different form names to get append composite application view

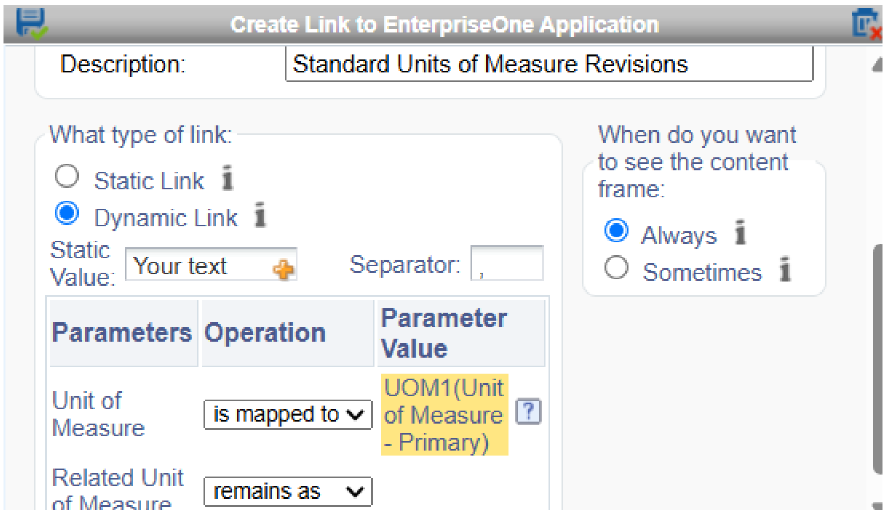





Create Link to EnterpriseOne Application
Link Information:
Application: *
P41002
Form: *
Item Unit Of Measure Conversions(W41002D)
Version:
Personal Form:
Default
Name: *
P41002|W41002D
Description:
Item Unit Of Measure Conversions
Maximize Main Grid:


Create Link to EnterpriseOne Application
Dynamic Link
Sometimes
Static Value:
Your text
Separator:
Parameters
Operation
Parameter Value
Business Unit
is mapped to
MCU(Branch/Plant)
Item Number - Short
remains as
Unit of Measure
remains as
Related Unit of Measure
remains as
Process UOM Conversions by Branch
remains as
Item Number - Unknown Format Entered
is mapped to
LITM(Item Number)


Create Link to EnterpriseOne Application
Link Information:
Application: *
P41003
Form: *
Standard Units of Measure Revisions(W41003B)
Version:
Personal Form:
Default
Name: *
P41003|W41003B
Description:
Standard Units of Measure Revisions

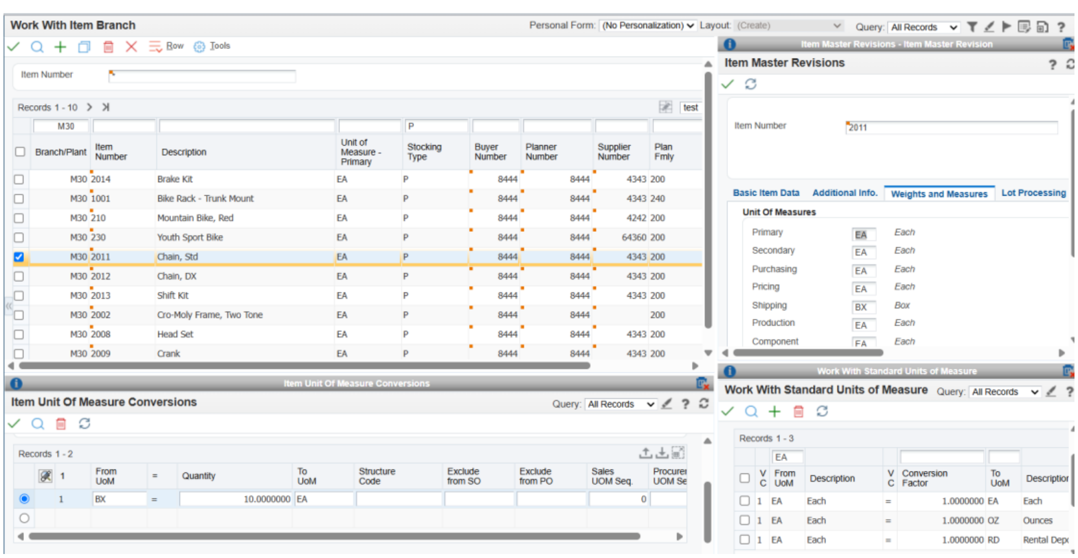


Step 3

Completed view of first right pane looks like below.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



CAFE1 Onhand vs Safety stock

Business Requirement:

You are troubleshooting MRP messages on why certain products/components are coming up with more buy messages. Or some users ask you for information on current inventory compared to the safety stock value assigned. Instead of running some custom reports (or) asking IT to do SQL query (or) look into multiple JDE applications (which takes time), this CAFE1 will answer the question instantly.

Technology used: CAFE1

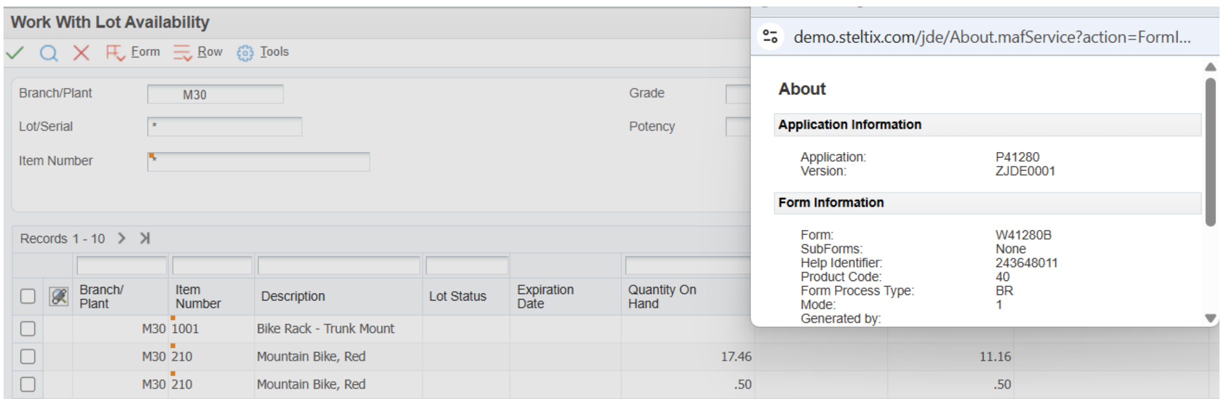
Limitations: In this CAFE1 example we are using a cost inquiry application to know current on-hand, which could be at different location, hence users need to total up all the locations manually. **Another quick solution is to replace OneView cost inquiry P41271 with lot availability application P41280**

Table/Application Used: P41271 OR P41280, P41026

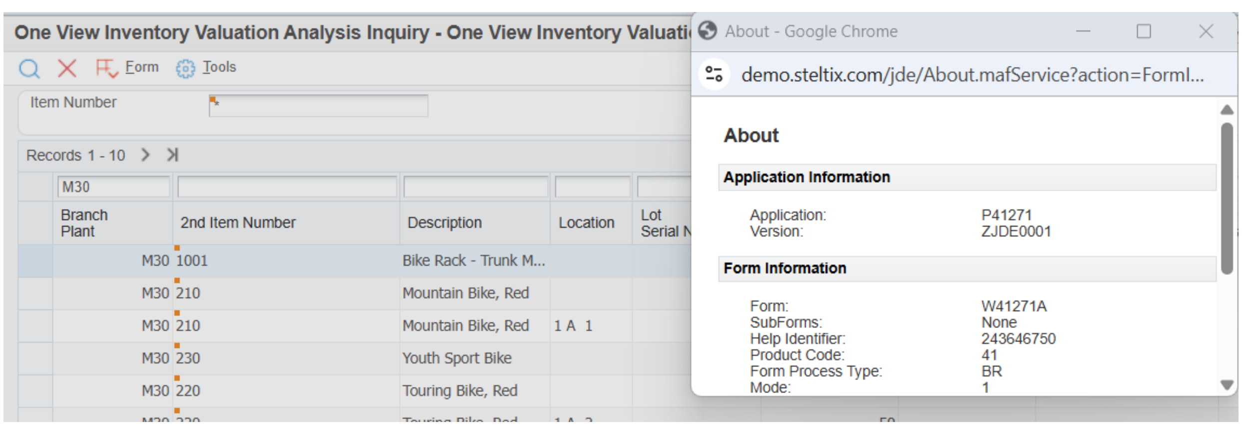
Step 1

Open UX one cost inquiry application

P41280



P41271

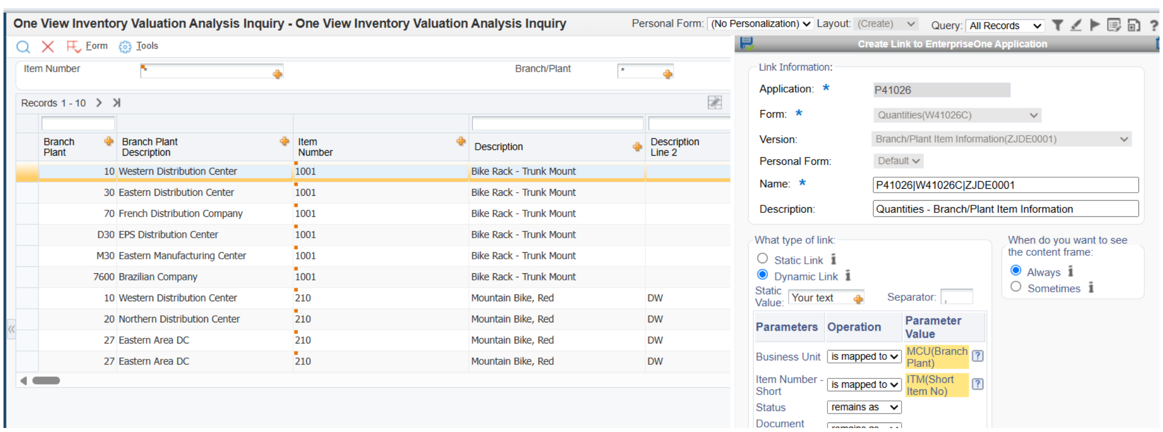


P3425

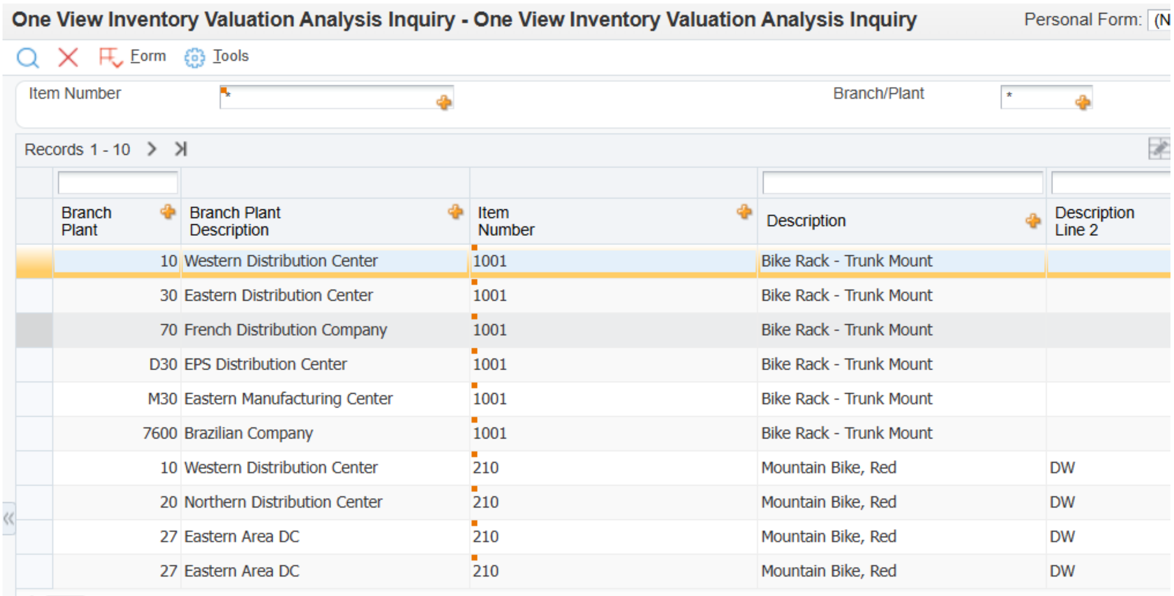
STEP 2

On the primary application (in this example P41271) click edit form layout under your profile name (top right). Cafe1 window will open up. Select E1 application and drag/drop the window to the right pane. Select the values/application as defined below

Cafe1 composite page below



Left pane split below for better visual clarity


One View Inventory Valuation Analysis Inquiry - One View Inventory Valuation Analysis Inquiry   Personal Form: (N

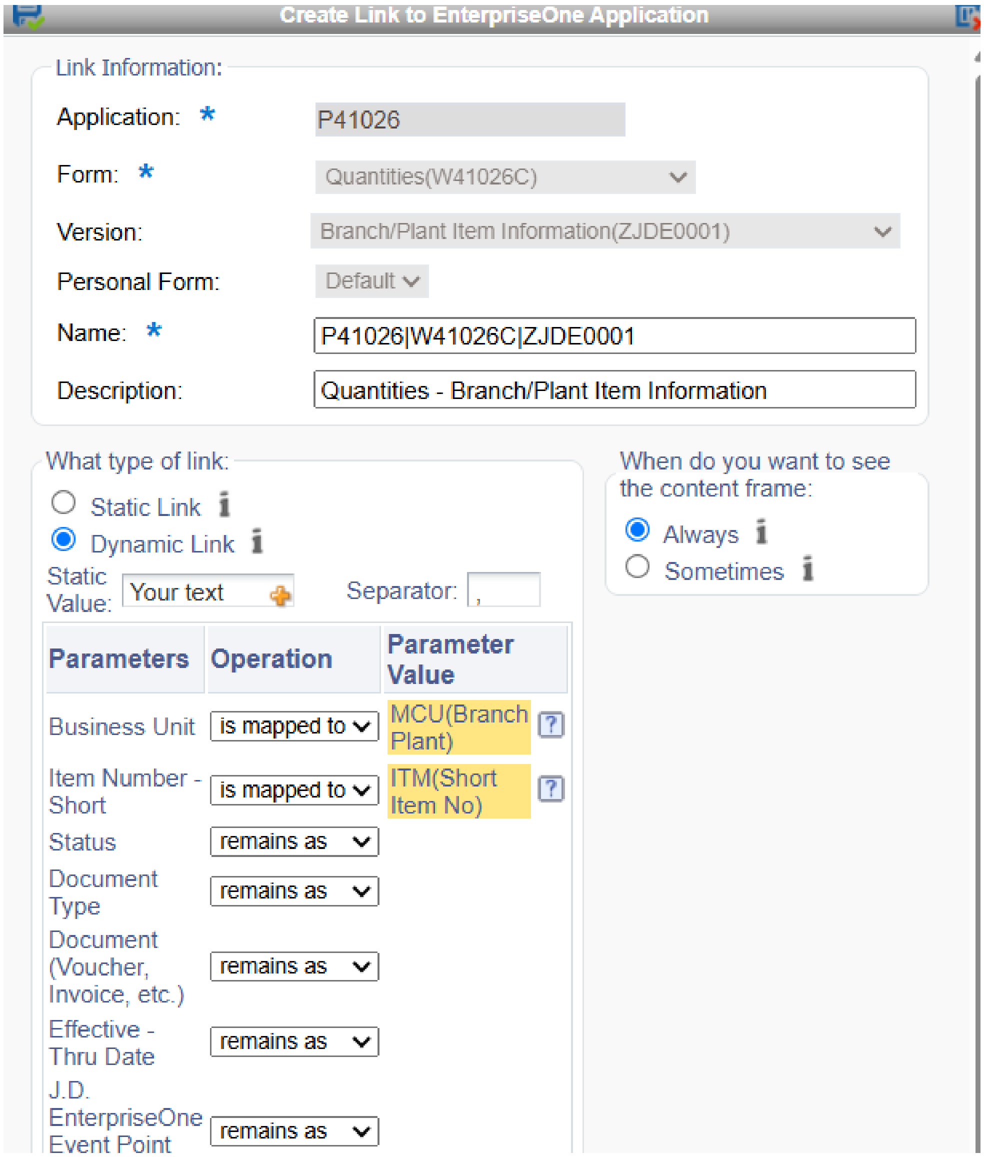
Form   Tools

Item Number   Branch/Plant *

Records 1 - 10

Branch Plant	Branch Plant Description	Item Number	Description	Description Line 2
10	Western Distribution Center	1001	Bike Rack - Trunk Mount	
30	Eastern Distribution Center	1001	Bike Rack - Trunk Mount	
70	French Distribution Company	1001	Bike Rack - Trunk Mount	
D30	EPS Distribution Center	1001	Bike Rack - Trunk Mount	
M30	Eastern Manufacturing Center	1001	Bike Rack - Trunk Mount	
7600	Brazilian Company	1001	Bike Rack - Trunk Mount	
10	Western Distribution Center	210	Mountain Bike, Red	DW
20	Northern Distribution Center	210	Mountain Bike, Red	DW
27	Eastern Area DC	210	Mountain Bike, Red	DW
27	Eastern Area DC	210	Mountain Bike, Red	DW

Right pane split below for better visual clarity


Create Link to EnterpriseOne Application
Link Information:
Application: *
P41026
Form: *
Quantities(W41026C)
Version:
Branch/Plant Item Information(ZJDE0001)
Personal Form:
Default
Name: *
P41026|W41026C|ZJDE0001
Description:
Quantities - Branch/Plant Item Information
What type of link:
Static Link
Dynamic Link
Static Value:
Your text
Separator:
,
When do you want to see the content frame:
Always
Sometimes
Parameters
Operation
Parameter Value
Business Unit
is mapped to
MCU(Branch Plant)
Item Number - Short
is mapped to
ITM(Short Item No)
Status
remains as
Document Type
remains as
Document (Voucher, Invoice, etc.)
remains as
Effective - Thru Date
remains as
J.D. EnterpriseOne Event Point
remains as

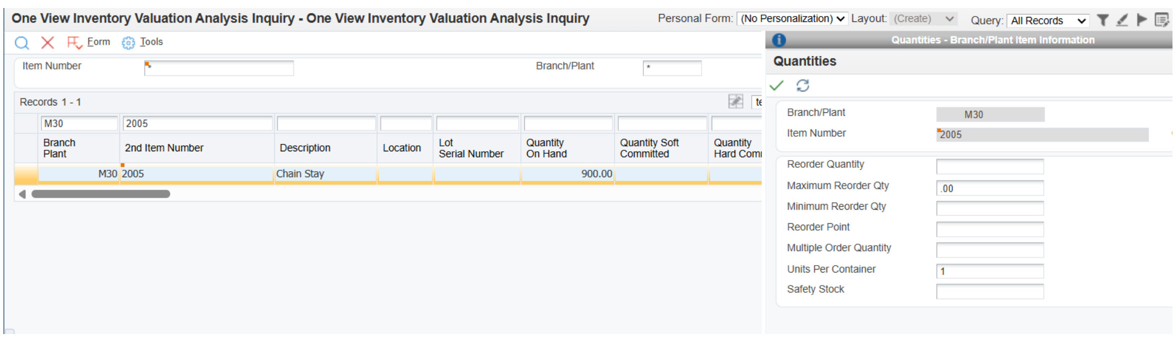
Step 3

Final Cafe 1 layout composite view

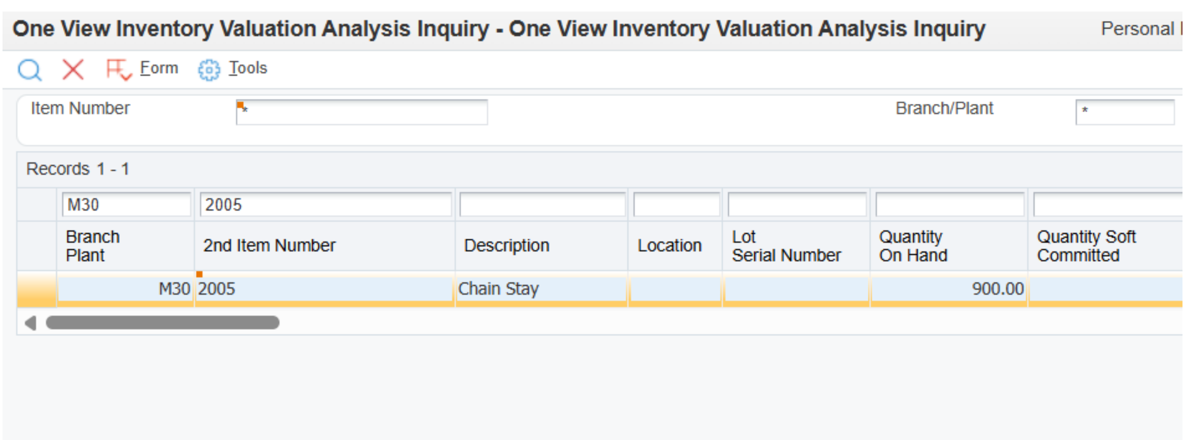
Location field is visible in this application. Filter out data and select the row, CAFE1 will bring the safety stock/quantities view on your right pane.

Save the composite with a unique yet clearly understandable name.

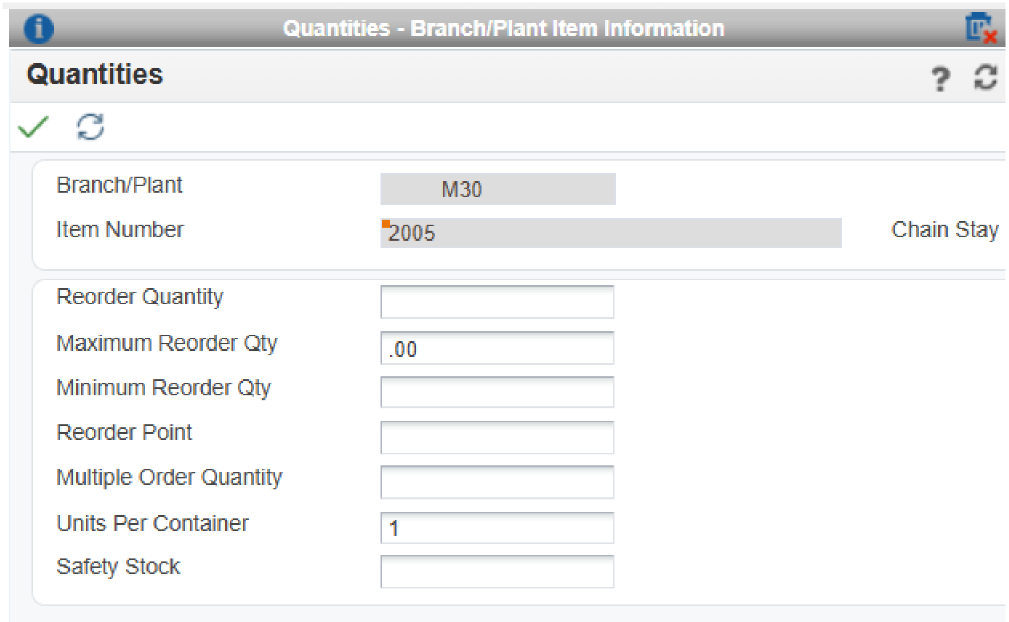
Ask IT for deployment and promotion to PD.



Left side piece for clarity



Right side piece for clarity



Grid Extension: Item Branch

Business Requirement:

Many users across the organization have access to an Item Branch application. User role security will define whether they have full control or partial read only view. Please query data for various exceptions. There is no need to generate static reports on data extract on item branch table or ask IT for SQL extract dump. With grid extension, you can bring key values which are normally in the row exit options. Have all required fields visible in the grid help you to filter out data on exceptions, example planning code=1 but no other planning values populated. Message display fence=0 and you are wondering why there are no MRP messages yet!

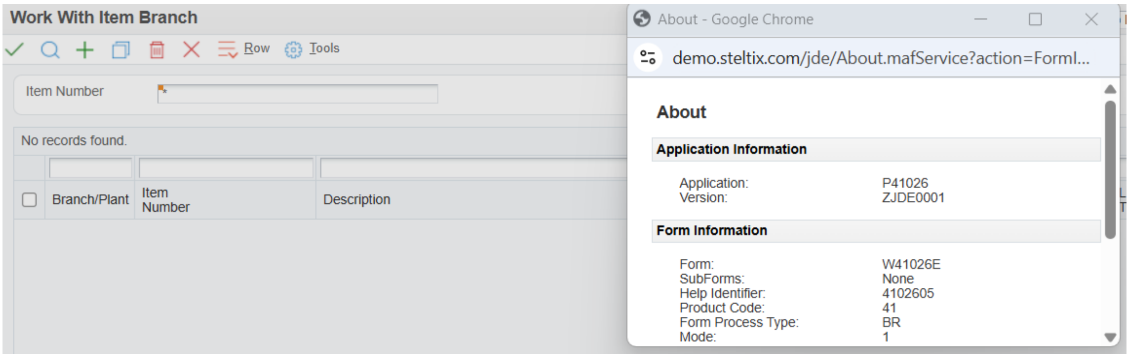
Technology used: Item Branch application

Limitations: None. Please check security granted to right roles

Table/Application Used: P41026

Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

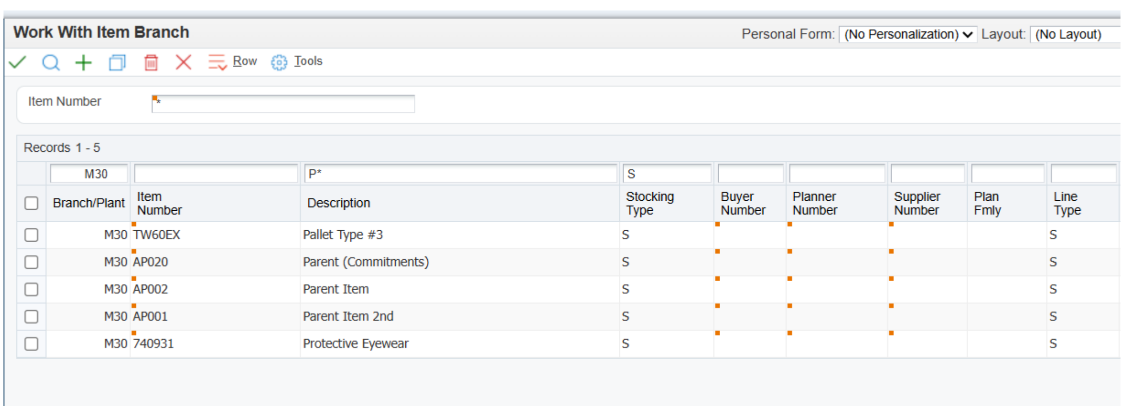


Step 2

Customize the grid (example below), place some QBE values to get valid data points

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
60193		I	1	1			2		5
60003		I	1	1			2		5
60011		I	1	1			2		15
60020		I	1	1			2		10
60169		I	1	1			2		5
60177	10	U	1	1	15	C	3	60	5
60185		I	1	1			2		5
60071		I	1	1			2		15
60134		I	1	1			2		5
60142	10	U	1	1	15	C	3	60	5

test

Short Item No	Freeze Time Fence Days	Issue Type Code	Order Policy Code	Order Policy Code	Planning Time Fence Days	Planning Time Fence Rule	Planning Code	Message Time Fence Days	Leadtime Level
								<1	>1
60775		I	1	1			2		20
60716		I	1	1			2		5
723962		I	1	1			2		2
60863		I	1	1			2		25
60871		I	1	1			2		25
60880		I	1	1			2		4
60898		I	1	1			2		4
723971		I	1	1			2		2
723989		I	1	1			2		2
723997		I	1	1			2		2

NOTE: This above example shows all planning parameters brought into the main grid. This could be expanded to bring all category codes into the main grid. And bringing all the quantities fields is another example. This will save user time by going into each row exit multiple times. They can achieve similar purposes by using a data browser but that needs separate security discussions.

This type of grid extension is helpful in making many custom watchlist on data exceptions and alerts.

Grid Extension: Customer Billing Instructions

Business Requirement:

You are working in the group responsible for address book maintenance and/or you work as CSR and need customer profiles & configurations. It takes time and effort to query data from regular JDE applications. You have identified the customer, go to the row exit & then go to different tabs.

What if all critical fields can be brought into main grid?. Grid extensions help you handle that process.

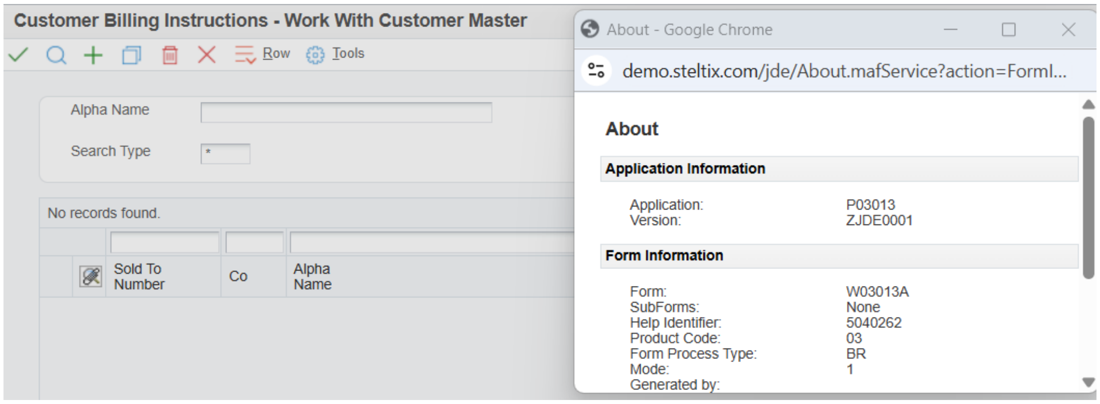
Technology used: Customer Master application

Limitations: Adhere to your current role security and controls

Table/Application Used: P03013

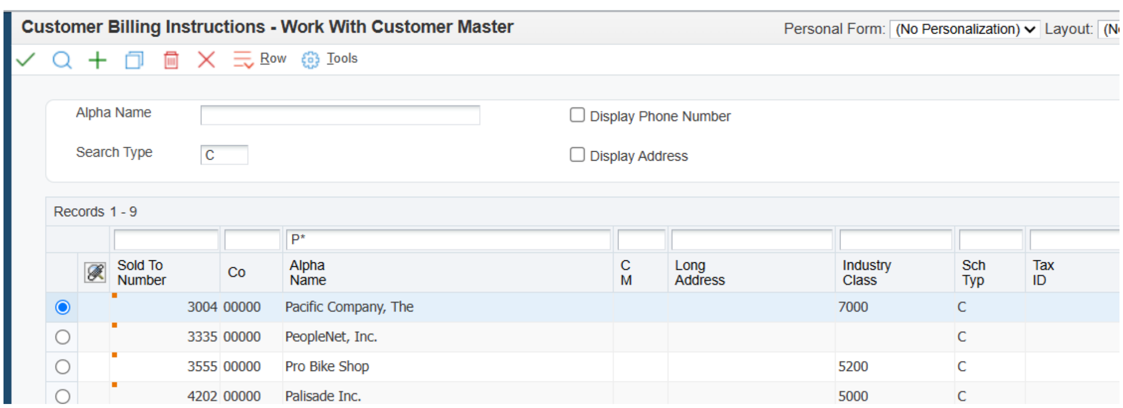
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2

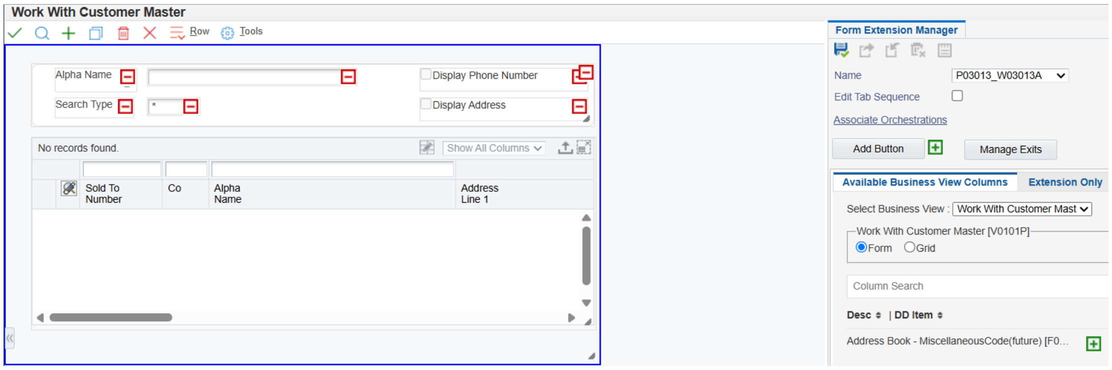
Customize the grid (example below), place some QBE values to get valid data points



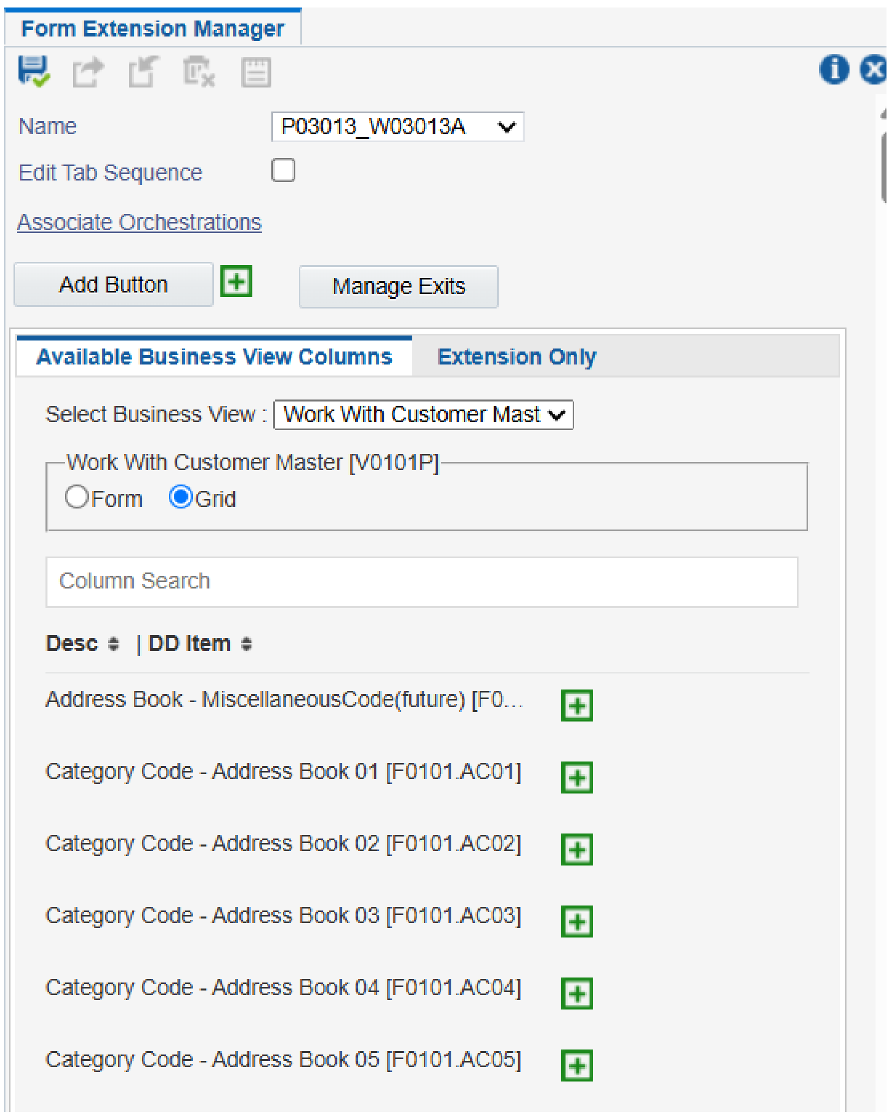
Step 3

Click on the form extension manager icon on your top right.

If a side window does not open up, check back with IT to see whether this feature is enabled across your system.



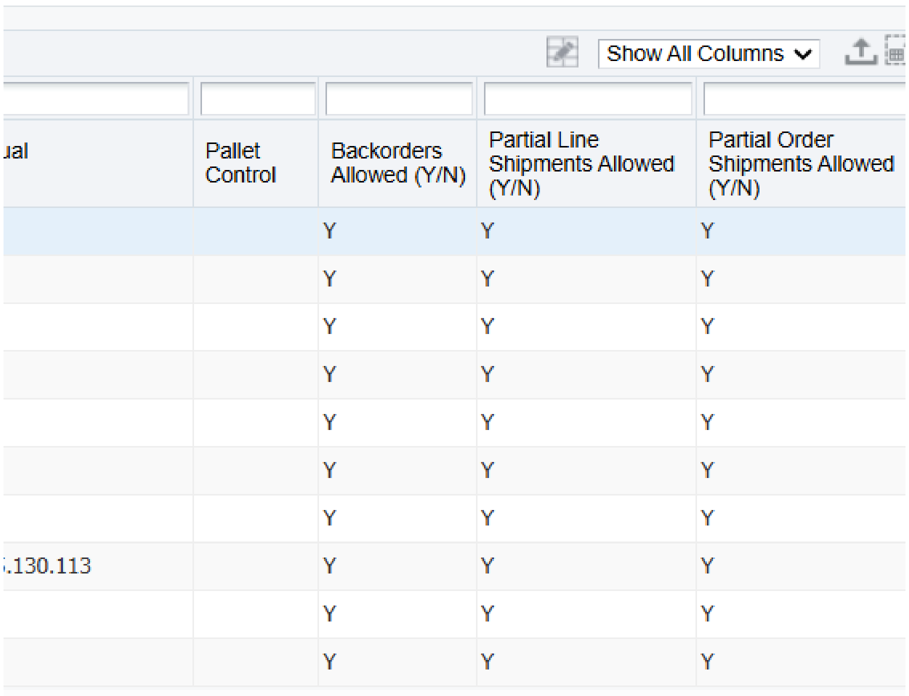
Click on the grid radio button on the app shown below. **Click on Desc sort icon to get all the fields in the naming order, it helps to find your fields quicker**



Click on the plus icon on fields you wanted to get added.

Press the save button (no prompt for name given). Close the blue x mark

The following three fields are added to your main grid (a [portion of the grid show below for clarity in view)



ual	Pallet Control	Backorders Allowed (Y/N)	Partial Line Shipments Allowed (Y/N)	Partial Order Shipments Allowed (Y/N)
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
		Y	Y	Y
.130.113		Y	Y	Y
		Y	Y	Y
		Y	Y	Y

Give a unique grid customization name, once realign the fields.

Step 4

This grid customization needs to be deployed using WEB OMW or regular OMW. Provide the list of roles involved with this application/grid.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.

NOTE: A very simple example is given in this section. You can bring many more fields like last user updated, last update date, etc. into the grid for quicker audits. This avoids going to IT for running SQL queries which gets outdated quickly.

Personal Form Work Order Entry

Business Requirement:

Work orders get created from 1- auto sales order entry process, 2-configurator process, 3- MRP workorder message processing activity, etc. Work orders can also be entered into manually for the make part and/or for as a parent workorder linking multiple child work orders. And most of the time changes to work order transactions are handled in p48013 application.

This application has many tabs, and it takes time to tab through if you are processing multiple orders. Personal form consolidates all such required field into a single tab, and you have the option of making any field as a required one in data entry.

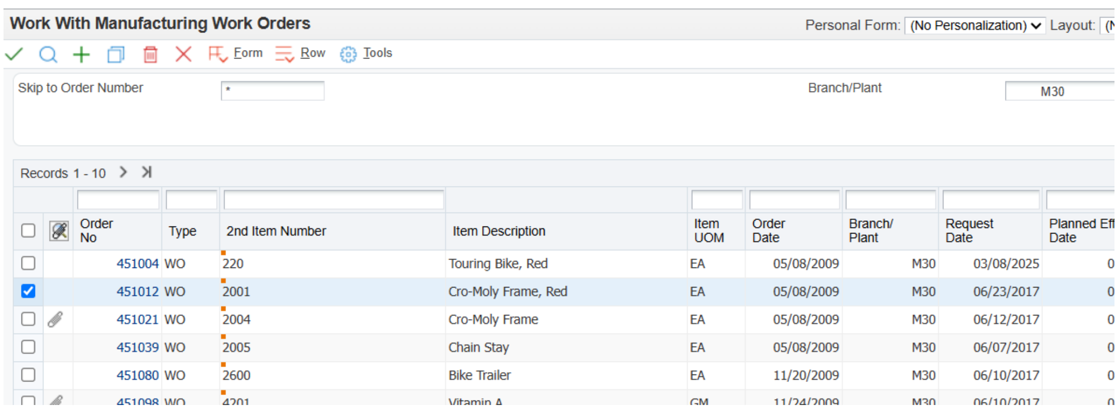
Technology used: Work Order Entry

Limitations: Adhere to your current role security and controls to create personal forms

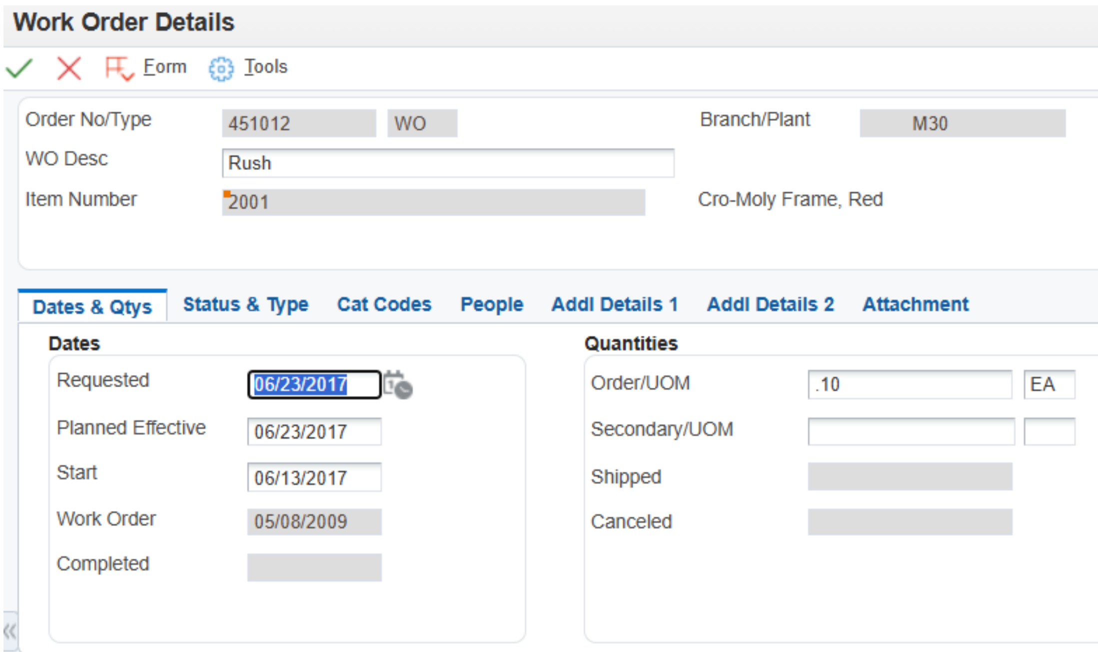
Table/Application Used: P48013

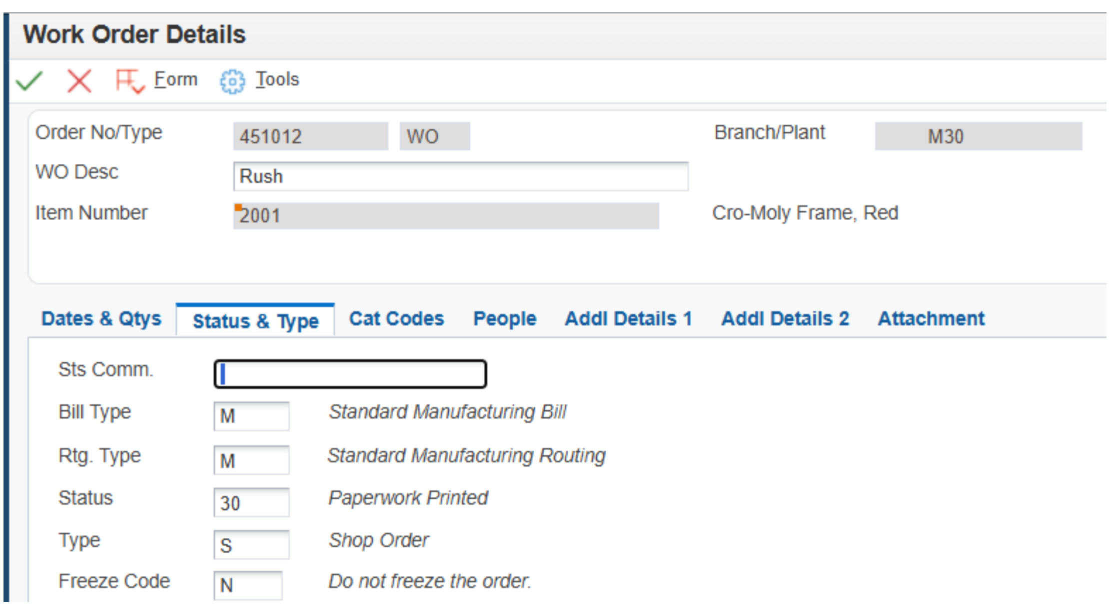
Step 1

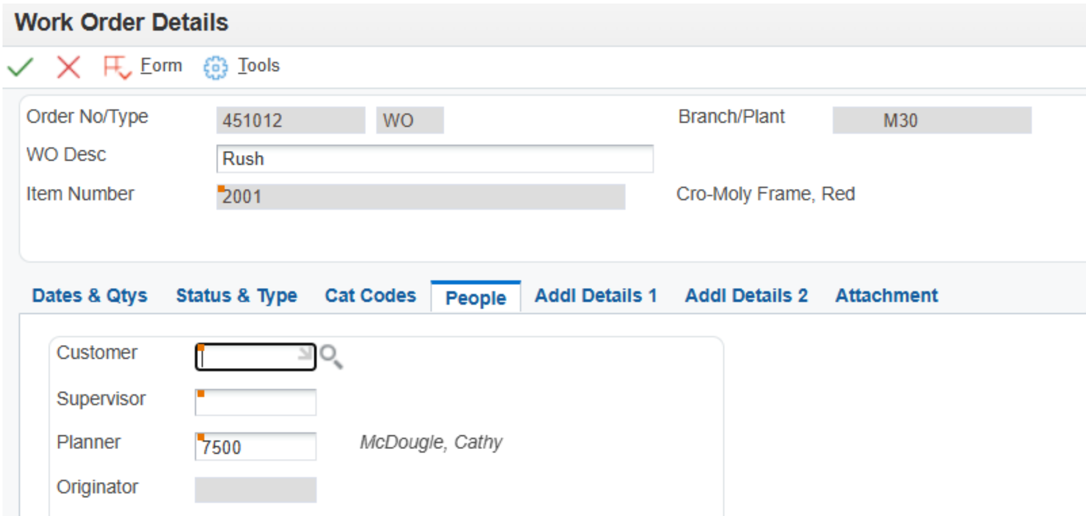
Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

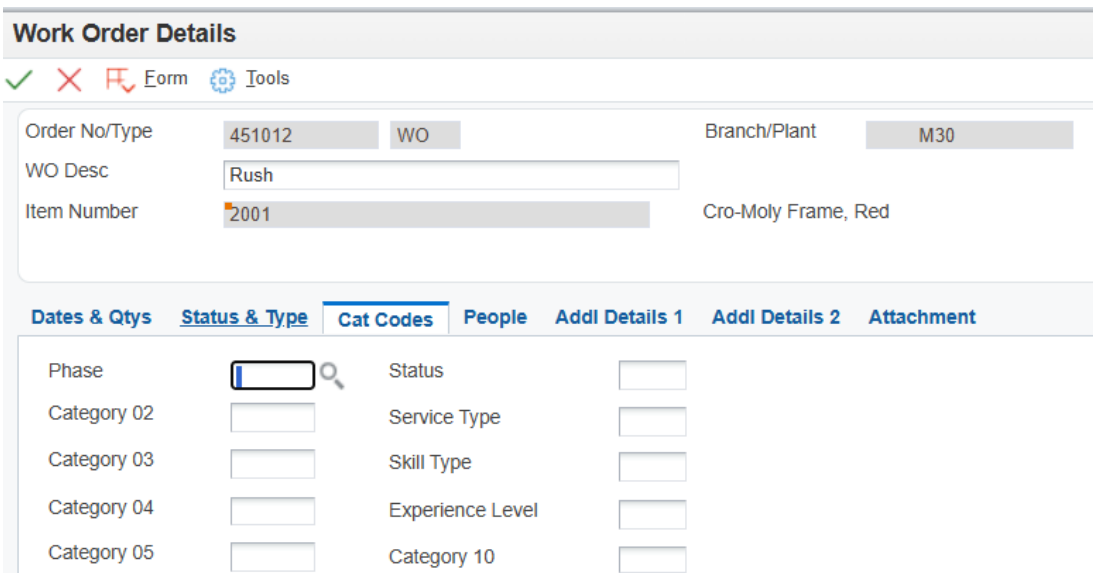


Examples of different tabs are given below



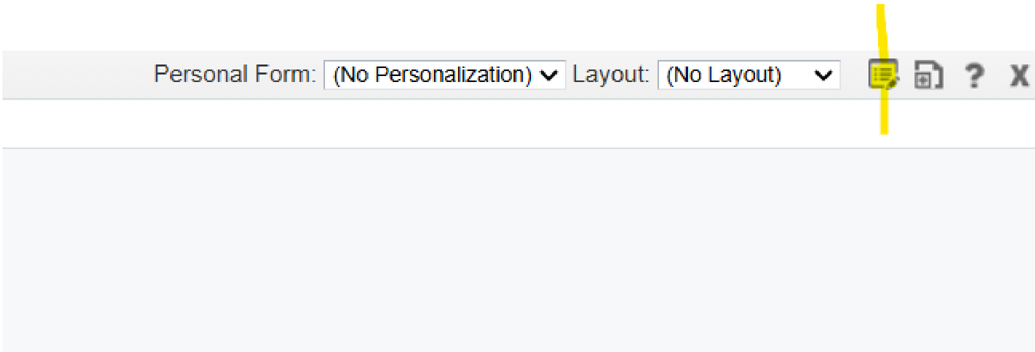



Work Order Details
Form
Tools
Order No/Type
451012
WO
Branch/Plant
M30
WO Desc
Rush
Item Number
2001
Cro-Moly Frame, Red
Dates & Qtys
Status & Type
Cat Codes
People
Addl Details 1
Addl Details 2
Attachment
Customer
Supervisor
Planner
7500
McDougle, Cathy
Originator

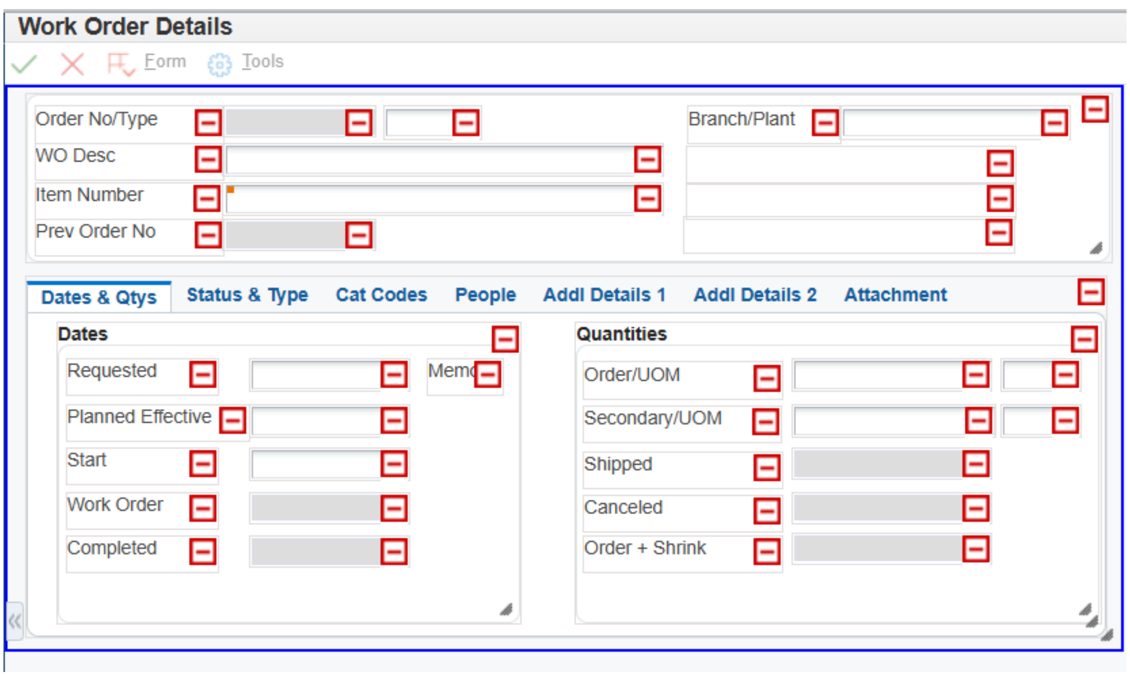

Work Order Details
Form
Tools
Order No/Type
451012
WO
Branch/Plant
M30
WO Desc
Rush
Item Number
2001
Cro-Moly Frame, Red
Dates & Qtys
Status & Type
Cat Codes
People
Addl Details 1
Addl Details 2
Attachment
Phase
Status
Category 02
Service Type
Category 03
Skill Type
Category 04
Experience Level
Category 05
Category 10

Step 2

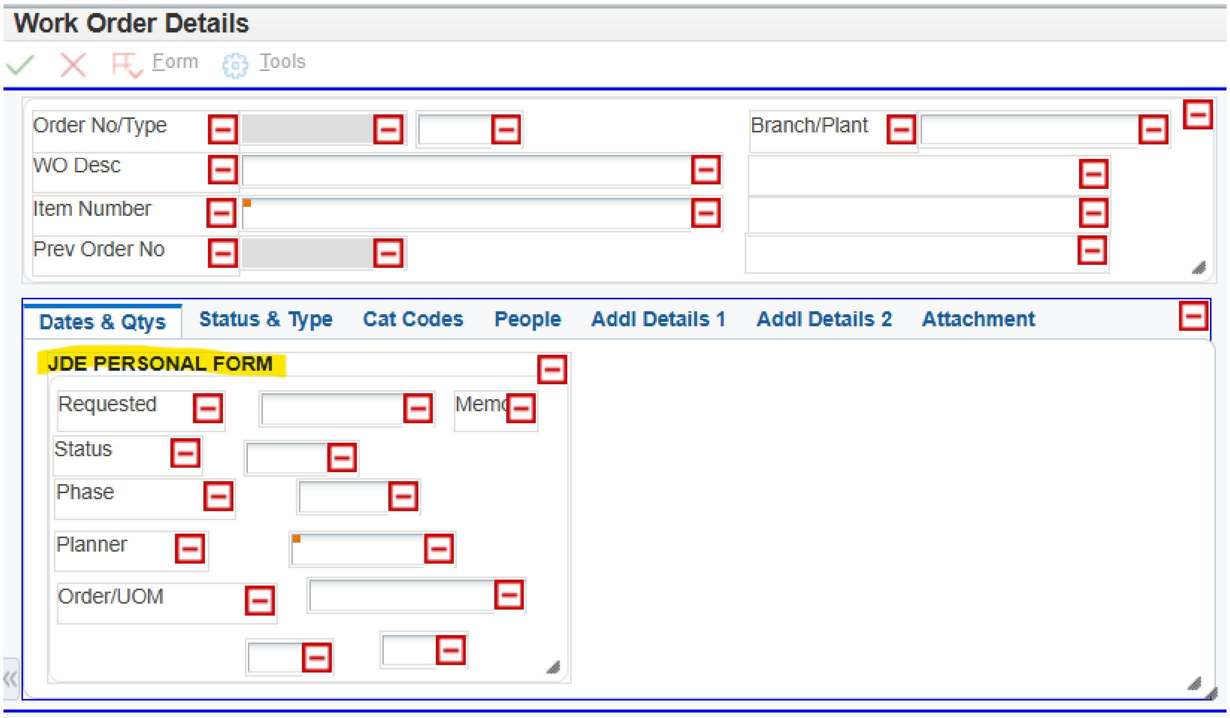
Invoke personal form icon on your top right (see below)



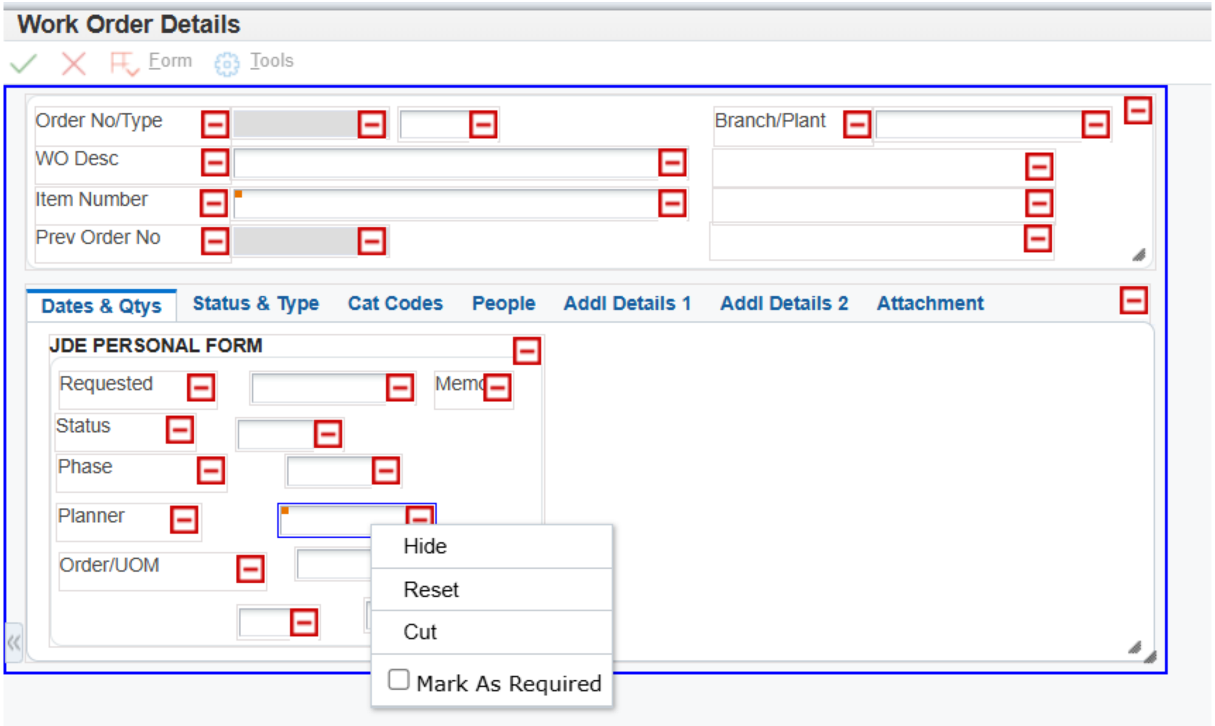
You can click on each field under each tab, to delete it OR cut & paste on another tab. You can realign the column for better view



You can override the tab name, if needed



You can click on a field to know the options. Hide is better than deleting so that you can restore back later if required instead of creating another new personal form. Click on mark as required if needed (which was not required previously in JDE regular vanilla)



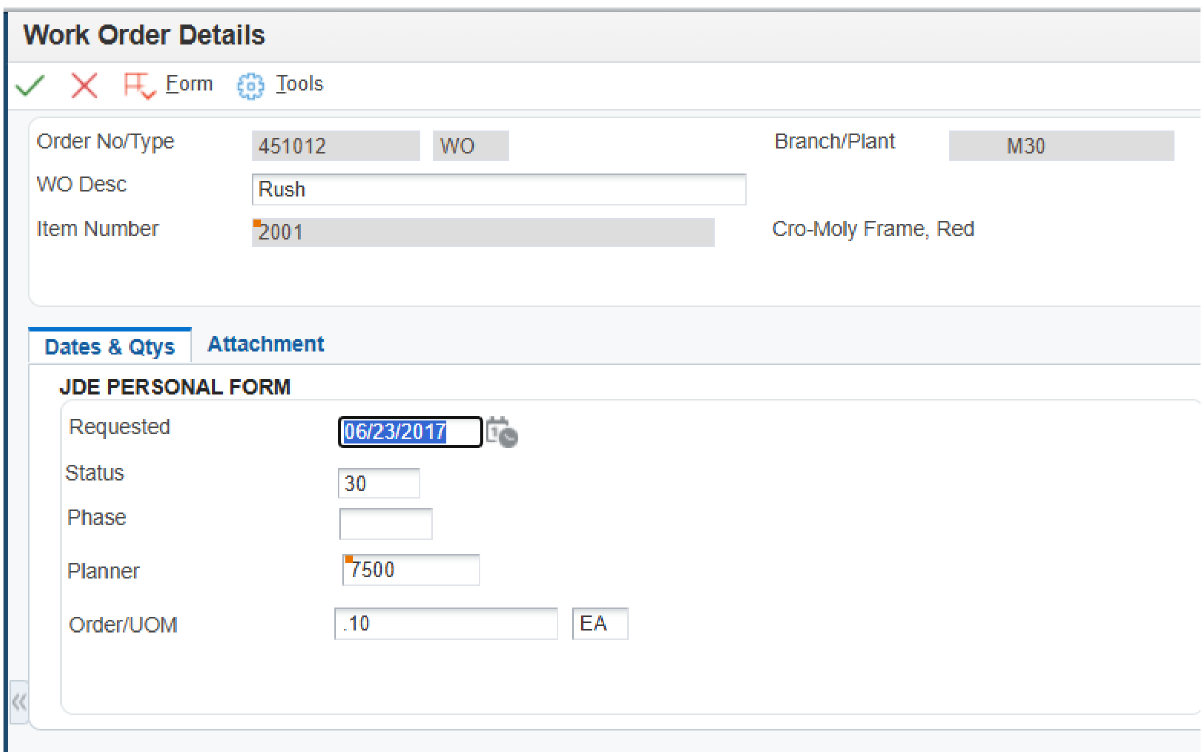
Work Order Details
Form
Tools
Order No/Type
Branch/Plant
WO Desc
Item Number
Prev Order No
Dates & Qtys
Status & Type
Cat Codes
People
Addl Details 1
Addl Details 2
Attachment
JDE PERSONAL FORM
Requested
Memo
Status
Phase
Planner
Order/UOM
Hide
Reset
Cut
Mark As Required

Step 3

Final view. Only required fields are grouped in the first tab. Other unused tabs are removed.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



Personal Form Purchase Order Entry

Business Requirement:

Purchase orders get created from MRP workorder message processing activity. Most of the time purchase orders are entered into manually for the stock, non-stock, and services orders. And any changes to purchase order dates and quantities are made in P4310 application

This application has many tabs on the header, and it takes time to tab through if you are processing multiple orders. Personal form consolidates all such required field into a single tab, and you have the option of making any field as a required one in data entry.

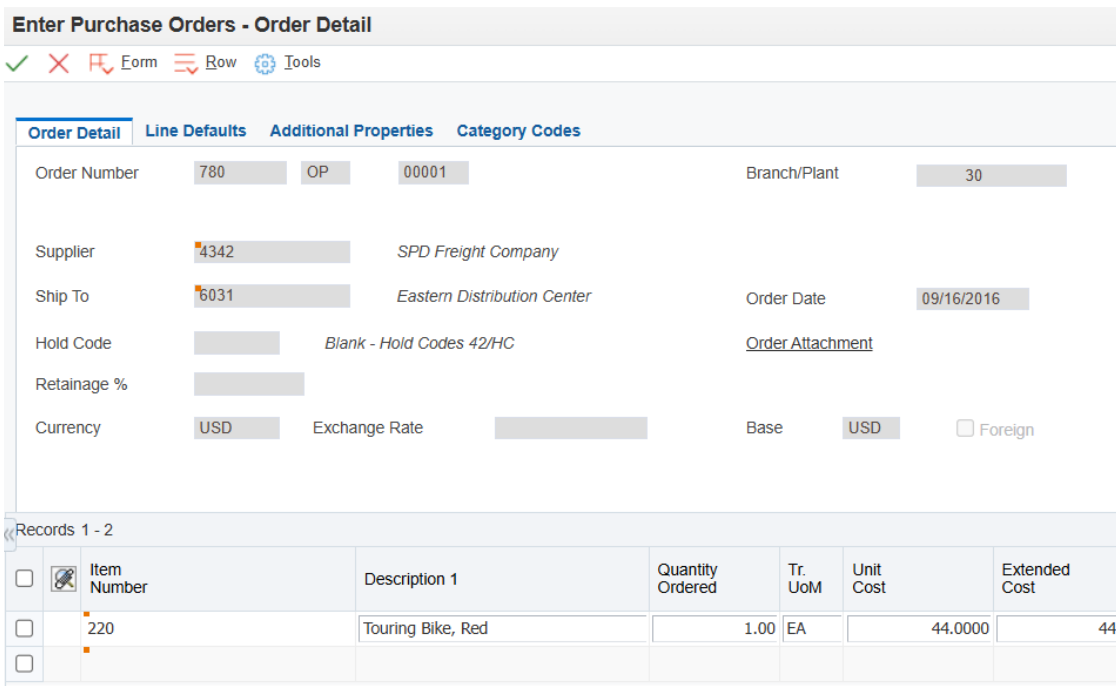
Technology used: Purchase Order Entry

Limitations: Adhere to your current role security and controls to create personal forms

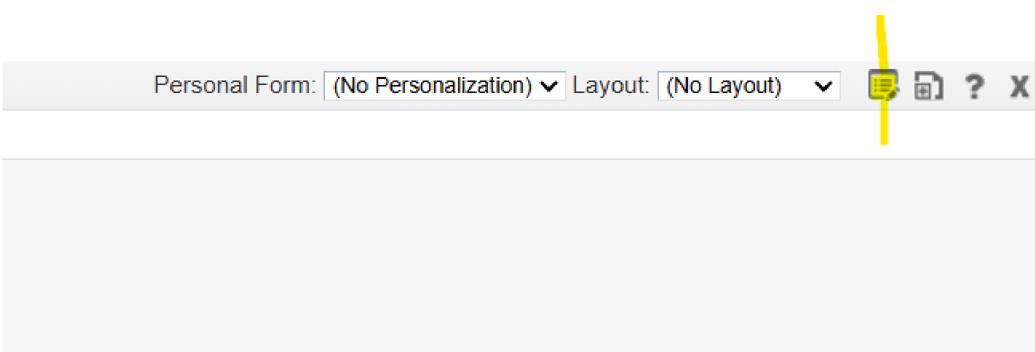
Table/Application Used: P4310

Step 1

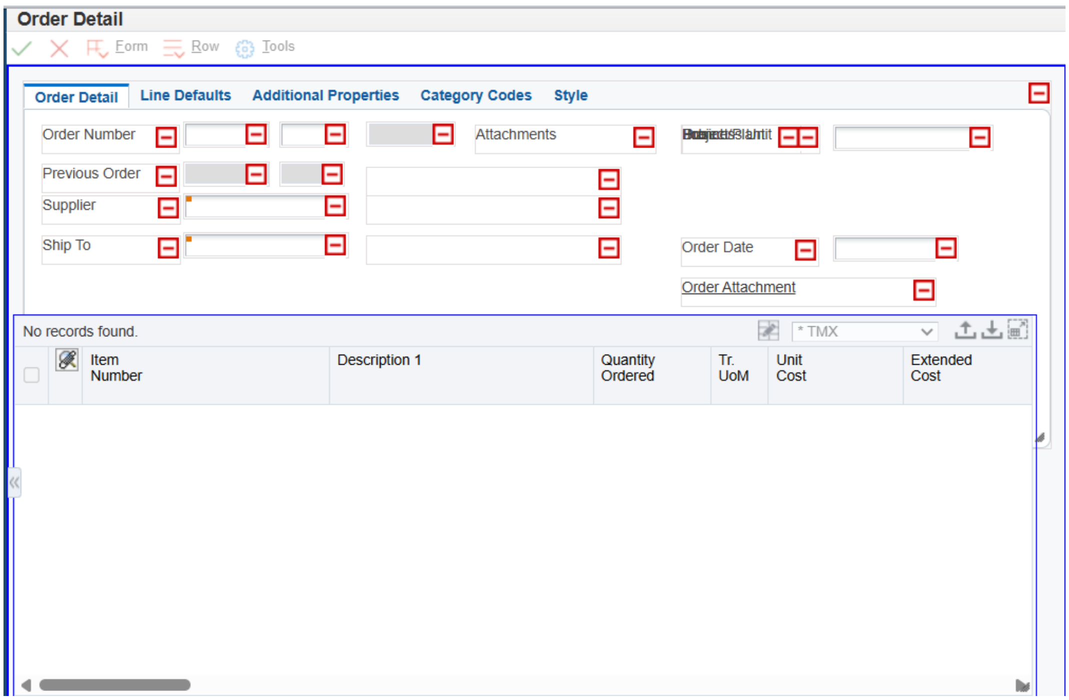
Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2 Invoke personal form icon on your top right (see below)



You can click on each field under each tab, to delete it OR cut & paste on another tab. You can realign the column for better view

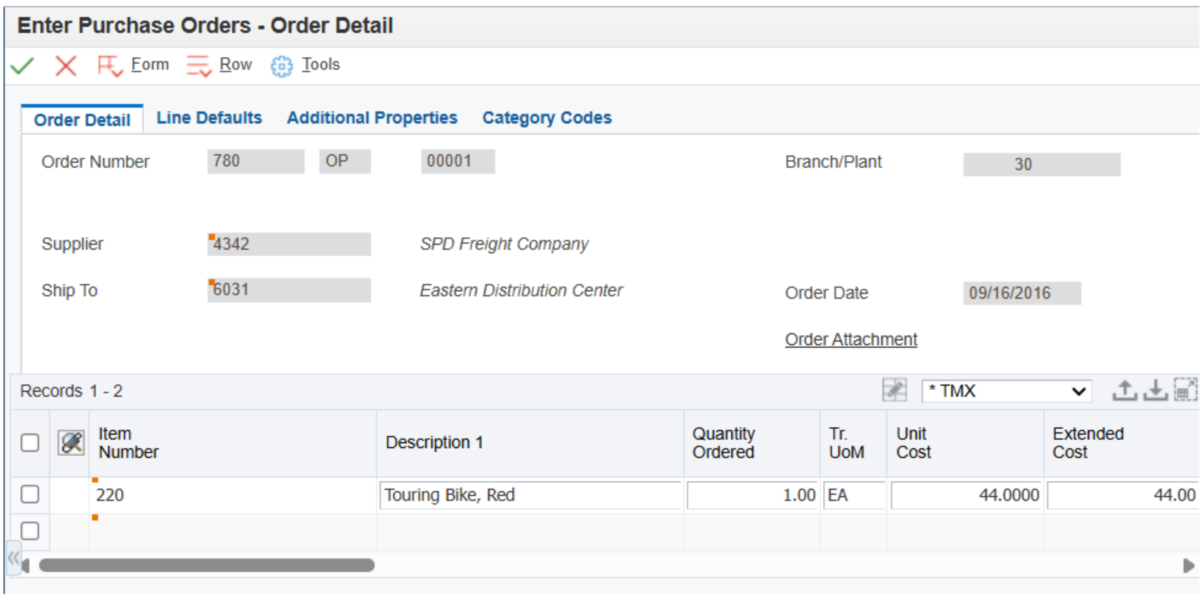


Step 2

Final view. Only required fields are grouped in header. Other unused tabs can be removed. You get more real estate in the header space.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



Personal Form Sales Order Entry

Business Requirement:

Sales orders can come from EDI orders and are mostly entered manually from the P4210 application. All changes to dates and quantities are processed in the same application

This application has many tabs on the header, and it takes time to tab through if you are processing multiple orders. Personal form consolidates all such required field into a single tab, and you have the option of making any field as a required one in data entry.

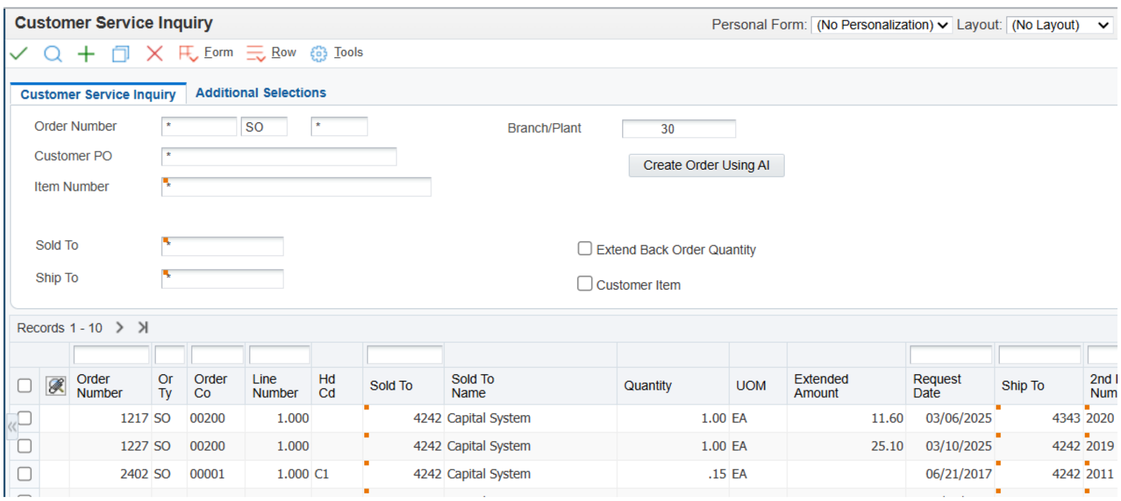
Technology used: Sales Order Entry

Limitations: Adhere to your current role security and controls to create personal forms

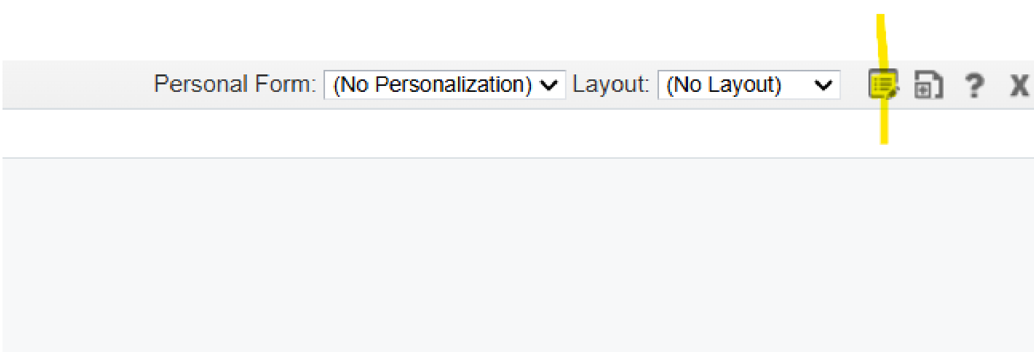
Table/Application Used: P4210

Step 1

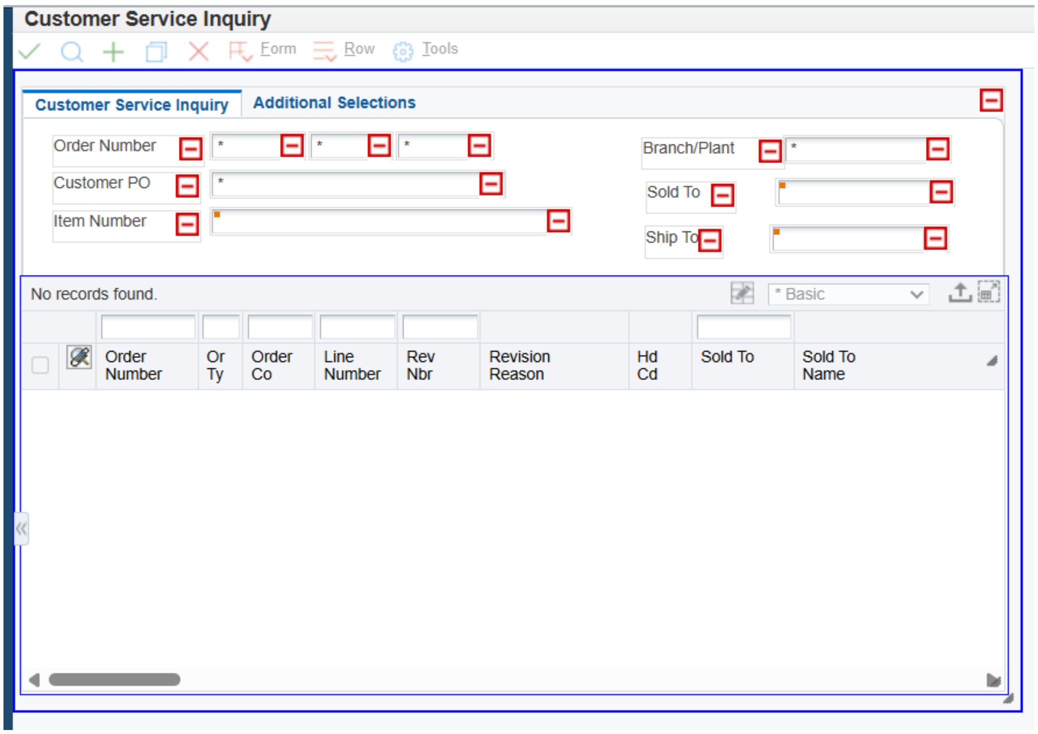
Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists



Step 2 Invoke personal form icon on your top right (see below)



You can click on each field under each tab, to delete it OR cut & paste on another tab. You can realign the column for better view

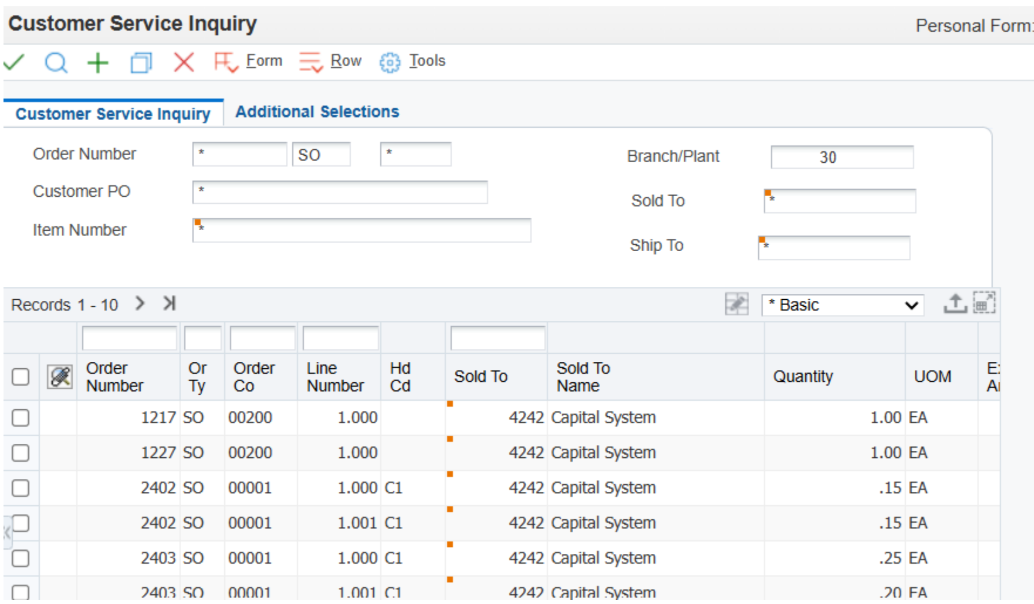


Step 3

Final view. Only required fields are grouped in header. Other unused tab(s) can be removed. You get more real estate in the header space.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



Personal Form Address Book Revisions

Business Requirement:

Master data management group may be responsible for creating and maintaining address book records. Customer service or buyers may have limited access to make changes to their respective field values

This application has many tabs on the header, and it takes time to tab through if you are processing multiple address book records. Personal form consolidates all such required field into a single tab, and you have the option of making any field as a required one in data entry.

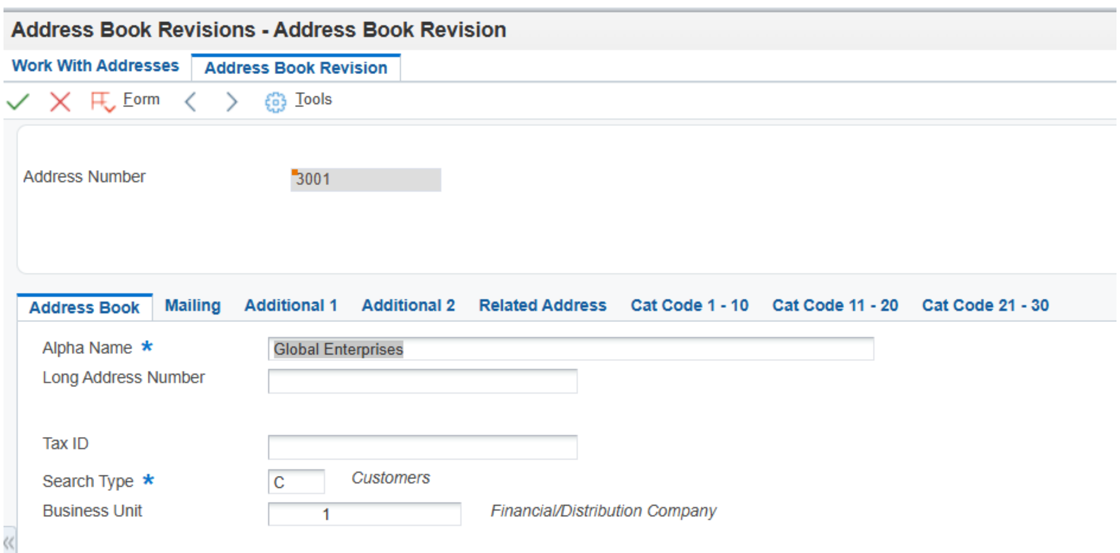
Technology used: Address Book Entry

Limitations: Adhere to your current role security and controls to create personal forms

Table/Application Used: P01013

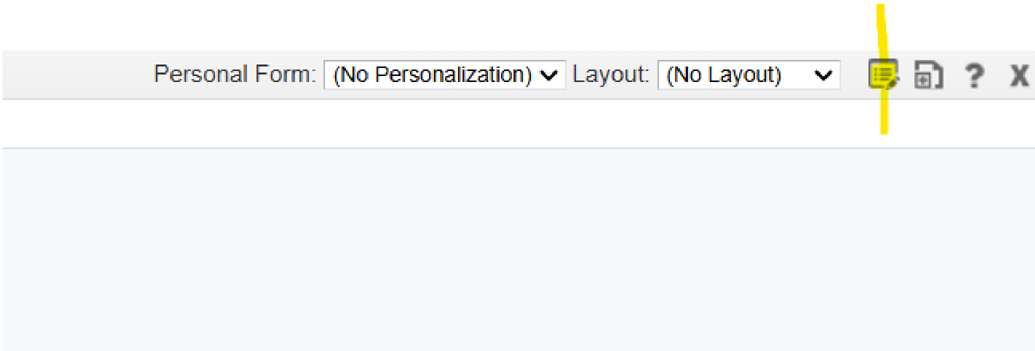
Step 1

Open this application from your menu. If it does not exist, ask IT to deploy to your security role. You will be testing this in a non-production environment first, so you can always ask for enhanced role to open fast path. Ensure the right version of the application exists

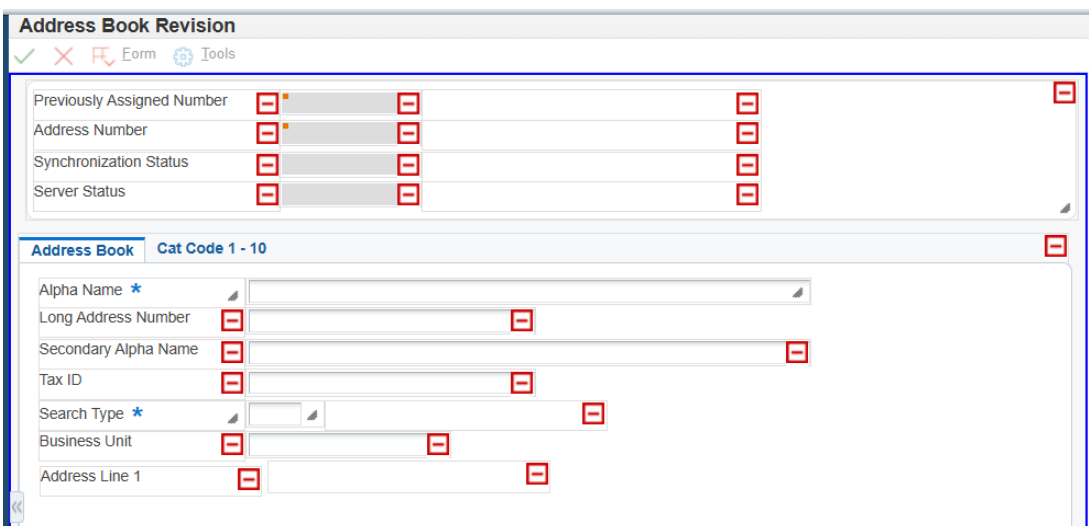


Step 2

Invoke personal form icon on your top right (see below)



You can click on each field under each tab, to delete it OR cut & paste on another tab. You can realign the column for a better view. In this example multiple tabs are totally removed since they are not needed in this business.



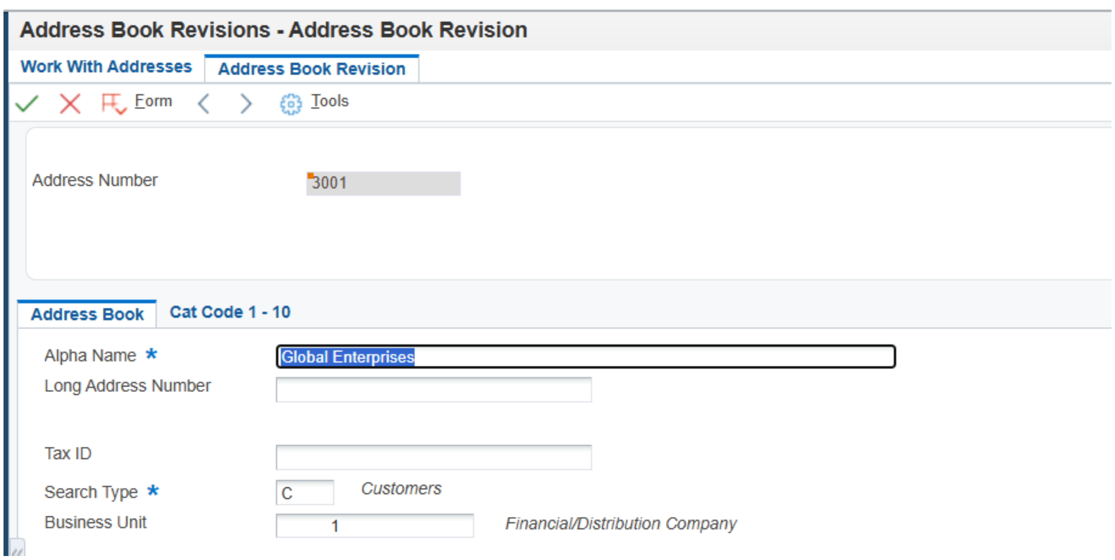
Step 2

Final view. Only required fields are grouped in header. Other unused tabs can be removed. You get more real estate in the header space.

Please test this activity. In demo instance the fields were not enabled to cut and paste in different tabs.

Save the composite with a unique yet clearly understandable name.

Ask IT for deployment and promotion to PD.



Publications:

	About the Author - List of Publications	
	Technical Books	
1	Implementing Oracle JDE UDOs	March 15, 2025
2	Implementing Oracle JDE Manufacturing Tip & Tricks	May 28, 2018
3	Implementing Oracle JDE Manufacturing	July 20, 2017

JDE Books in Amazon

Other Books in
Amazon

About the Author:

Mathur (matt) Ravikumar, an author, consultant, and political/economic cartoonist

Matt started his own consulting company in 2012 and provide functional consulting in enterprise resource planning business software applications.

He has self-published 30+ books over many years (including three books on Oracle's JD Edwards ERP software manufacturing applications).

He also publishes weekly cartoon content on political and economic news and events on YouTube Channel. Two of his Udemy lessons have been released, one on entrepreneurship and another on self-publishing. Four self-published books have been released into audio format, available in audible and iTunes.

Regular meditator and trekked partially to Himalayas (Mount Kailash) towards a spiritual journey in 2016.

He is passionate about writing, especially on the subjects that can teach life's lessons. He likes to mentor others and find their talent sitting dormant inside.

He lives near San Francisco/California & reachable by email. Mattravikumar@gmail.com

Www.mattravikumar.com