JD Edwards

INFOCUS

ENVISION

Auto Tendering Transportation Carriers in JD Edwards

Presented by:

Grant Thornton
- Tom Spond
- Craig Davied

Atkore International
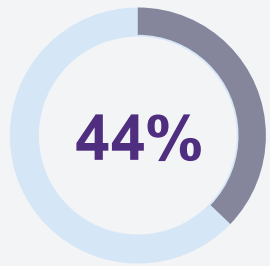- Brett VanPelt
- Mike Ullmann
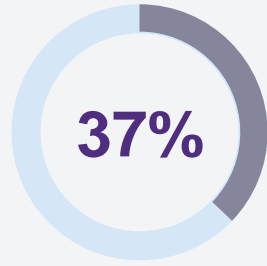- Hayden Harris

Session ID

102480

About Grant Thornton

Thriving since 1924, our U.S. firm is people-focused and purpose-driven. We believe business should be more personal and that the strongest results start with trust.
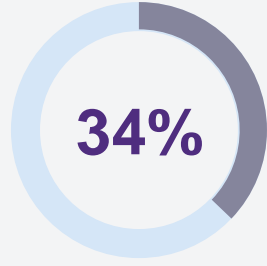
Who we serve:

44% Fortune 100 companies

37% Fortune 500 companies

34% Fortune 1000 companies

* Statistics as of July 31, 2020

$1.92bn in revenue

8,459 people, including 595 partners

53 offices

Our Oracle Practice

ERP and SCM
Financials | Revenue management | Accounting hub | Project accounting | Risk management | Project execution Procurement | Inventory management | Cost management | Maintenance | Manufacturing | Order management | Product lifecycle and data management | Supply chain collaboration and planning

EPM Analytics
Planning and budgeting | Profitability and cost management | Financial close and consolidation | Tax reporting and provisioning Management and operational analytics | Narrative reporting | Account reconciliation | Enterprise data management

HCM
Culture journey | Talent acquisition | Workforce administration | Talent management | Workforce development Alumni network

Data governance & cloud integration

PaaS

Solution delivery center (off-shore and on-shore)

Industries

Construction, Real Estate & Hospitality	Consumer And Industrial Products	Energy	Financial Services	Healthcare And Life Sciences	Not-For-Profit Organizations	Private Equity	Public Sector	Technology

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gt.com/silverlining

About Grant Thornton JDE

JD Edwards practice – 80+ dedicated professionals in U.S.

Project management and functional expertise

- Specialized functional resources
- Project management office
- Implementations
- Upgrades
- Mobile applications

- Third party integration architecture
- Business process re-engineering
- Managed services (functional)
- User materials and training

- Financials
- Distribution
- Manufacturing
- HR / Payroll
- CAM
- Project advisory

Technical

- CNC
- Development
- Workflow
- Security management

- Technical management
- Database management
- Infrastructure / hosting
- Managed services (technical)

- Private cloud
- Disaster recovery
- Security
- Development (FRICE)

Trusted business advisor

- Gap assessment
- Transformation
- Industry point of view
- Proven methodologies
- Process excellence

- Benchmarking
- ERP governance
- Data governance
- Master data management
- Reporting strategy

- Change management
- Cloud roadmap / strategy
- FASB planning
- Chart of accounts optimization

Oracle leadership

- The Leading Oracle Platinum Partner presenter at COLLABORATE, INFOCUS and OpenWorld conferences (more presentations than any other Platinum partner in the past 3 years)

- Featured in PROFIT magazine – JD Edwards Special Issue

- Teaming with JDE product development – we work with JD Edwards on enhancing the code base for customers (e.g. OneView Reporting, Revenue Recognition, Leasing Standards, Configurator)

Experience and recognition

- More than 250 JD Edwards implementations and upgrades as a practice

- Over 20 implementations in the past 5 years

- Over 50 upgrades in the past 5 years

- 2017 JD Edwards Partner Excellence Award for **User Adoption**

- 2016 JD Edwards Partner Excellence Award for **Vertical Industries**

- Oracle JD Edwards recognized Grant Thornton with its 2014 and 2015 JD Edwards Partner Excellence Award for Outstanding **Upgrades**

Tom Spond

- Functional / Technical Solution Architect
- 30 years JDE Experience
- 14 years JDE software development
- 16 years application and technology consultant for EnterpriseOne system implementations.
    - 23 Companies in various industries
    - JDE Transportation Mgmt
    - Oracle Transportation Mgmt (OTM)
    - Sales Order Mgmt
    - Procurement Mgmt
    - Integration with key 3rd party products

Craig Davied

- Director – JDE Practice
- Over 20 years JDE Experience
- Project planning and program management of multi-faceted implementation & upgrade projects
- Business process reengineering and system architecture design
- Primarily experienced with JDE Financials, Distribution, and Project Costing/Mgmt modules
- Numerous clients / industries
- Experience with EnterpriseOne & World Releases

Company Overview

Electrical Segment

OFFERING AND MARKET POSITION

Product	Rank
PVC Conduit	#1
Steel Conduit	#2
Cable Tray, Cable Ladder & Fittings	#2
PVC Coated Conduit	#3
Prefabricated Device Assemblies	#3
Stainless Steel Conduit	#1
Armored Cable	#2
Flexible and Liquidtight Conduit	#3
Elbows, Couplings & Nipples	#3

- ▲ **Manufacture high quality products used in the construction of electrical power systems** across various end-use applications

- ▲ **Atkore products are a staple for electrical distributors,** and our focus on service has helped us establish strong relationships with our customers

- ▲ **Comprehensive product portfolio** enables solution selling and ability to bundle

Key Brands: Allied Tube & Conduit, AFC Cable Systems, Heritage Plastics, Cope, and US Tray

Safety & Infrastructure Segment

Atkore

OFFERING AND MARKET POSITION

In-line Galvanized Mechanical Tube		#1
Barbed Tape		#1
Metal Framing and Related Fittings		#2
Security Bollards		Top 10

- **Design and manufacture solutions** for the protection and reliability of critical infrastructure; solutions marketed to contractors, OEMs and end-users

- **Global distribution capabilities** for our security focused products and metal framing systems

- **Value-added** engineering, installation and pre-fabrication services

Key Brands: Allied Tube & Conduit, Unistrut, Razor Ribbon, and Unistrut Construction

Atkore All Around You

Wire Basket Cable Tray and Fittings

Cable Tray, Ladder and Fittings

Electrical Prefabrication

Metal Framing & Fittings

PVC Trunking

PVC Electrical Conduit & Fittings

Armored Cable

Conduit and Cable Fittings

Metal Electrical Conduit

Specialty Electrical Conduit: Stainless Steel, PVC-Coated & Aluminum

Flexible Electrical Conduit and Liquidtight Conduit

Industrial Flexible Electrical Conduit

Agenda / Project Review

- Assessment Project: TMS vs. OTM Comparison
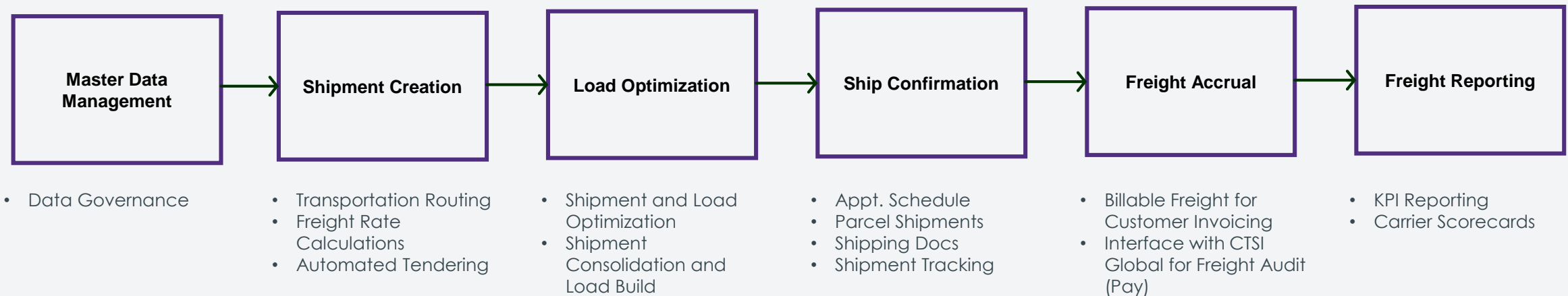- TMS Implementation
- Key Enhancements
  - Auto Carrier Tendering
  - Load Optimization
  - Carrier Scorecard / KPIs
- Roll-out Strategy
- Summary

TMS vs. OTM Comparison

- Key requirements have been grouped into transactional buckets for discussion
- Assigned the supporting functions, data, and interfaces to analyze

Master Data Management	Shipment Creation	Load Optimization	Ship Confirmation	Freight Accrual	Freight Reporting

- Data Governance

- Transportation Routing
- Freight Rate Calculations
- Automated Tendering

- Shipment and Load Optimization
- Shipment Consolidation and Load Build

- Appt. Schedule
- Parcel Shipments
- Shipping Docs
- Shipment Tracking

- Billable Freight for Customer Invoicing
- Interface with CTSI Global for Freight Audit (Pay)

- KPI Reporting
- Carrier Scorecards

TMS vs. OTM Comparison

E1 TMS

Advantages

- Tight Integration between Sales and Transportation
- Atkore is already using E1 TMS
- Technical team has experience with JDE
- Flexibility of "On Premise" package

Disadvantages

- Optimized Load Building will require development
- Load Tendering will require development
- Lack of standard functionality for future needs (i.e. Sourcing)

Gotchas

- Maintenance of routing & rating tables

Oracle OTM

Advantages

- Optimized Load (shipments) Building
- Automated Tender Acceptance / Carrier Portal
- Potential for substantial automation (out of the box)
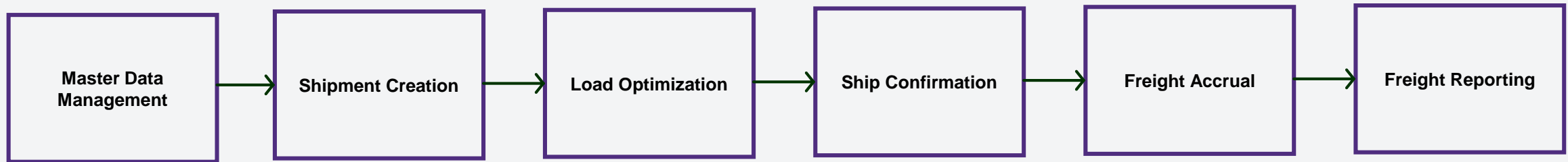- Functionality available for future needs (i.e. Sourcing)

Disadvantages

- Totally new system for users to learn
- Substantial new integration work to connect
- Being in the Cloud, Oracle dictates updates to software
- No TMS tables in E1, therefore, will have re-architect business processes like RF Smart, Order Activity Rules, & Shipping documents

Gotchas

- Integration with JDE is limited especially when order revisions are involved
- Will need to hire/train an OTM technical resource
- Maintenance of routing & rating tables

TMS vs. OTM Comparison

Master Data Management	→	Shipment Creation	→	Load Optimization	→	Ship Confirmation	→	Freight Accrual	→	Freight Reporting

Our Recommendation – JD Edwards TMS

- In regard to Atkore's lean support model and listed requirements, the costs associated with the amount of development to integrate OTM along with the added software, resource, and service fees outweigh the value of implementing OTM.

- Although OTM provides more complete functionality for load tendering, both systems can accomplish the additional requirements similarly.

- Neither solution will reduce the importance of master data maintenance.

- For load tendering JD Edwards TMS with EDI can provide a quality alternative to the native functionality in OTM.

- OTM historically requires additional time and resources to support.

TMS Current State / Project Background

- Atkore had originally implemented E1 TMS in "lite" model during Order-To-Cash Project
- Numerous manual processes existed
  - Carrier Selection / Tendering
  - Missing Carrier Pricing
  - Needed ability to ship by Shipment and/or Load
  - Adding freight to Sales Order
- 3rd party freight payables system
  - No Freight Audit History
- 20+ rollout locations

Key Pain Points to Address

- Replace manual processes with automated processes
  - Carrier Tendering and Response
  - Load Optimization
  - Load Building and Shipment Consolidation
  - Freight Update to accrue freight and add Billable Freight Line to Sales Orders
  - Transition to more Shipment based movements
- Routing guide not implemented in Routing and Rating
  - Configure miles-based Truckload rates.
  - RateWare XL for LTL
  - PC Miler
- Implement KPI and Carrier Scorecard to measure
  - Utilization
  - Carrier Performance

Guiding Principles

- Utilize as much standard functionality as possible

- Implement Load Optimization, Carrier Tendering and Freight Update with minimal impact on current process.

- Enhancements should not conflict with base TMS functionality

Auto Carrier Tendering
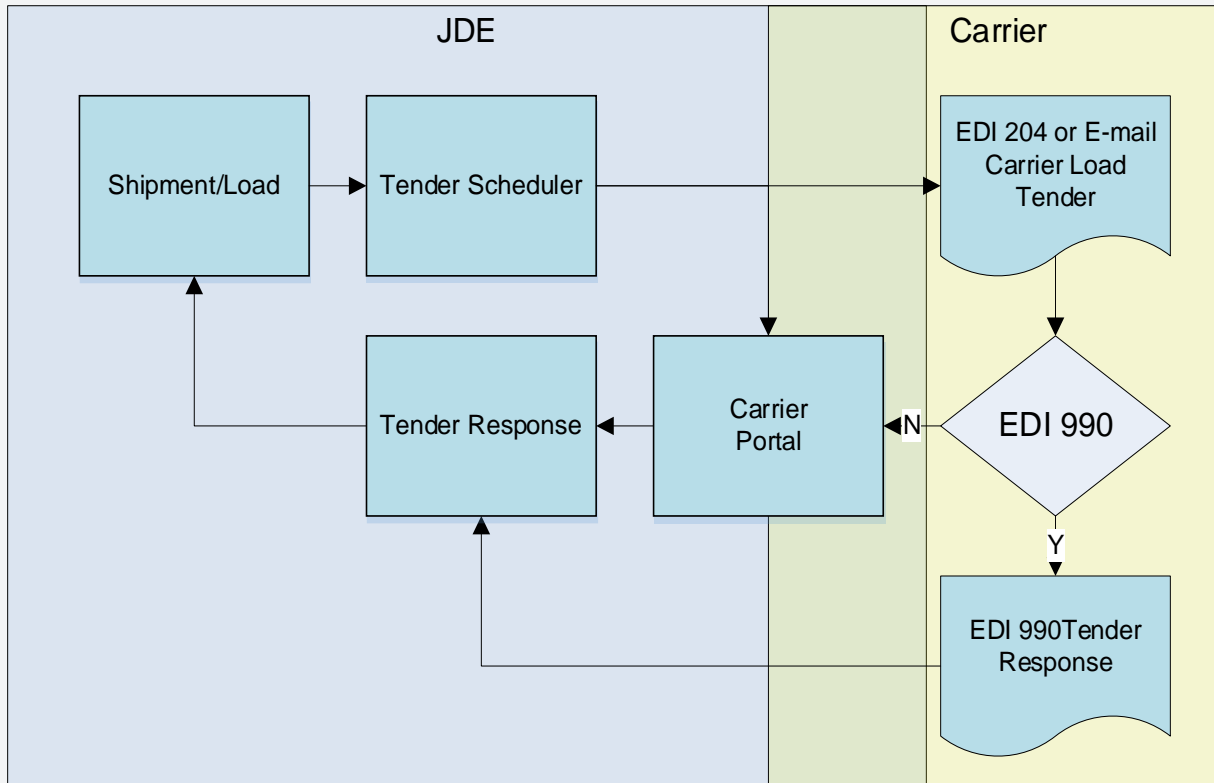
Purpose:
- Automate carrier tendering with the multiple methods:
  - EDI 204 Carrier Tendering
  - Non-EDI (E-mail) Carrier Tendering
  - Phone (Manual)
  - Carrier Portal to facilitate Tender Response
- Automate carrier tender response
  - EDI 990 Tender Response
  - Carrier Portal

Details:
- Carrier Portal accessible within E1 TMS and eternally by Carriers.
- Automatically cycle through Tender Schedule until Tender is accepted.
- Define Tenders by Carrier and Branch Plant
  - Tender Type
 - Tender Response Time
  - Auto Tender

Tendering: Big Picture

- Build Tender Schedule base on organizations routing guide
- Cycle through Tender Schedule until a tender is accepted
- Tender Sent to Carriers based on Tender Type
  - EDI 204
  - Email
  - Phone Call (manual)
- Tender Response
  - EDI 990
  - Carrier Portal

Benefits
  - Carriers have visibility to their real time Shipments/Loads and Status.
  - Carrier response generated real time
  - Carrier can be changed from the Tendering System without using the Routing Options application.
- Gotchas
  - Carriers need to be trained EDI 204 and Carrier Portal.
  - Organization and Carriers are on a schedule to respond to tenders.

Load Building Optimizer

Load / Shipment Optimization

↓

Auto Load Build / Shipment Consolidation

↓

Load / Shipment Approval
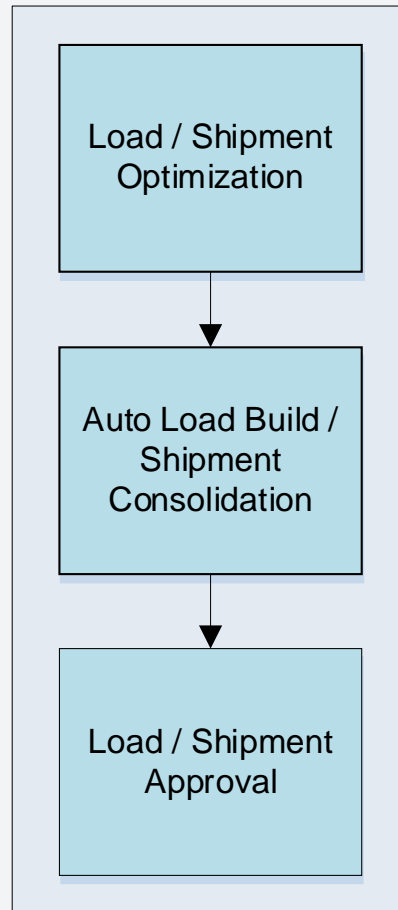
Purpose:

- Optimize Loads/Shipments by shipment date and geographic areas for better vehicle utilization.

Details:

- Optimize Shipments and Load
- Auto Load Build based on optimization algorithm.
  - Promise ship date
  - Geography / Route codes
  - Stop order
  - Number of stops
  - Customer delivery time requirements
- Auto consolidate Shipments

Load Optimization: Big Picture

- Optimize Load
- Auto build either Shipment or Load based on the optimization.

Benefits

- Better use of master data to optimize Shipments / Loads
- Quicker Shipment consolidation and Load building processes.
- Contained within JDE so easier for business to incorporate into their daily processes
- Ability to manually intervene if necessary

- Gotchas
  - Sales Orders cannot be changed during the optimization process.
  - Organization is not ready for this process

Carrier Scorecard/ KPIs

- Freight update history information
  - 3rd party freight reconciliation
- Establish key criteria for tracking / analysis
- Created scorecard for management review

Roll-out Strategy

- Phased approach / risk mitigation
- 20+ locations in North America
- Time frame – approx. 5-6 months
- Remote project delivery
  - Training
  - Cutover
  - Support

Summary

- Project Background
- E1 TMS vs. OTM
- Auto Carrier Tendering
- Load Building Optimizer
- Rollout Strategy

Any Questions?

Hear more from Grant Thornton

Stop by our booth—our team of JDE experts will be on hand to answer your questions….AND we're giving away a **Ring security camera**!

Tuesday

- **Options for configuring project cost detail within JDE** | Aaron Wood and Craig Davied | 2:00 p.m.
- **8 easy steps to evaluate the effectiveness of your EAM/CAM asset maintenance program** | Steve Yniguez | 3:15 p.m.

Wednesday

- **Where are all my orchestrators at? Let's take a look at notifications and UDO security** | Anthony Palmisano and Mohammad Shujaat | 8:15 a.m.
- **Import thousands of Invoices from your AP automation platform into JDE in seconds!** | David Kratzke and Mohammad Shujaat | 8:15 a.m.
- **Auto tendering transportation Carriers in JD Edwards** | Craig Davied | 3:00 p.m.
- **Positive pay 2.0: Now with 100% more** orchestrations | Mohammad Shujaat and Rick Snell, Murphy USA | 4:00 p.m.

Thursday

- **Realizing joint ventures in JDE** | Craig Davied | 8:15 a.m.
- **Workflow options with JD Edwards Orchestrator** | Dwight Moore and Anthony Palmisano | 11:15 a.m.
- **Automating currency exchange rates using JD Edwards & orchestrator** | Mohammad Shujaat and Anthony Palmisano | 1:15 p.m.

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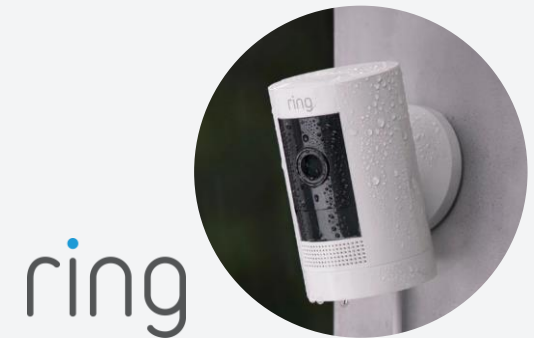
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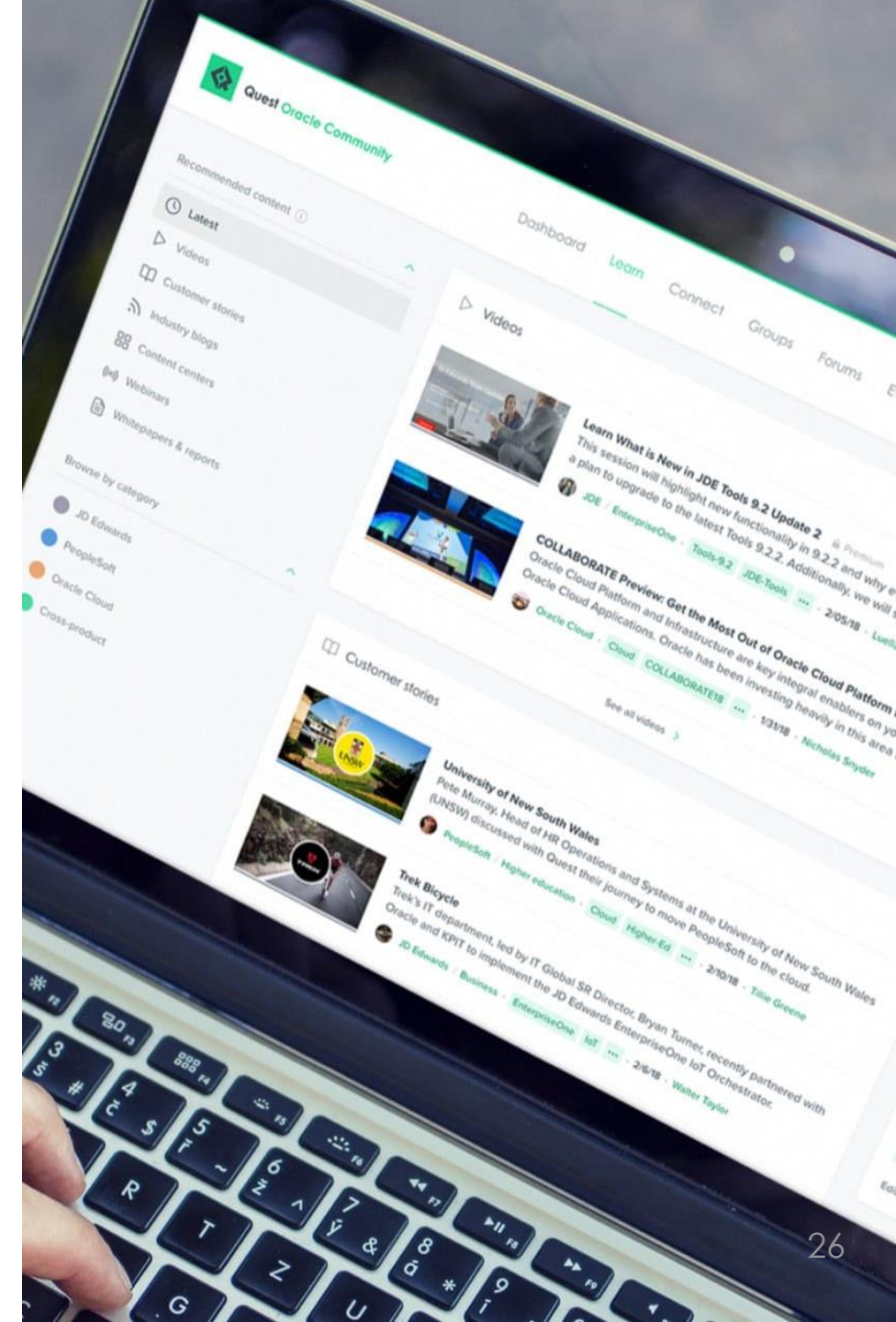
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