



JD Edwards

INFOCUS

ENVISION

Where are all my orchestrators at? Let's take a look at notifications and UDO security

Presented by:

Anthony Palmisano, Grant Thornton, LLP

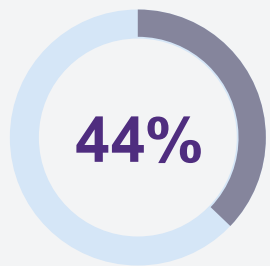
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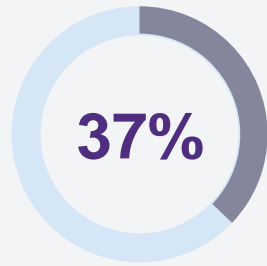
About Grant Thornton

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.

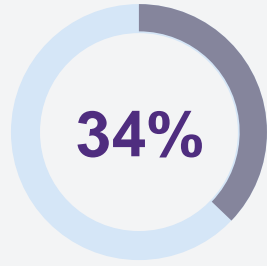
Who we serve:



Fortune 100
companies



Fortune 500
companies



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

Find your silver lining
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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**

Anthony Palmisano

Grant Thornton, LLP

Manager, Technology Transformation



- Specializes in:
 - Project Management
 - EnterpriseOne Upgrades
 - Orchestrator
 - Multiple E1 Modules
- Industries:
 - Energy
 - Retail
 - Manufacturing
 - Construction

Agenda

- Overview
- Setting Up a Notification
- User Defined Object (UDO) Security
- Subscribing to a Notification
- Testing a Notification

Overview

Notifications

- Can alert users to a required activity in the system
 - i.e. New job setup, copy accounts
- Can alert users when a Watchlist threshold has been reached
 - i.e. Batches available for approval/posting
- Can send informational messages
 - i.e. Work Center error when report errors out
- Can be scheduled



Notifications

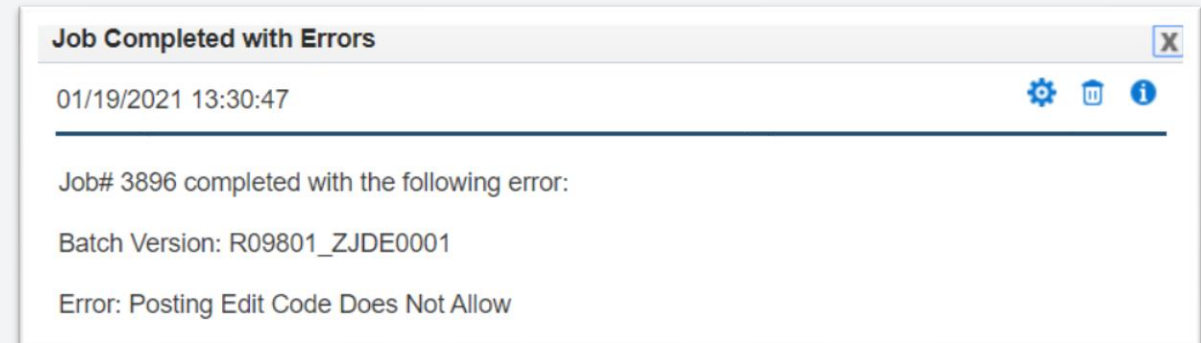
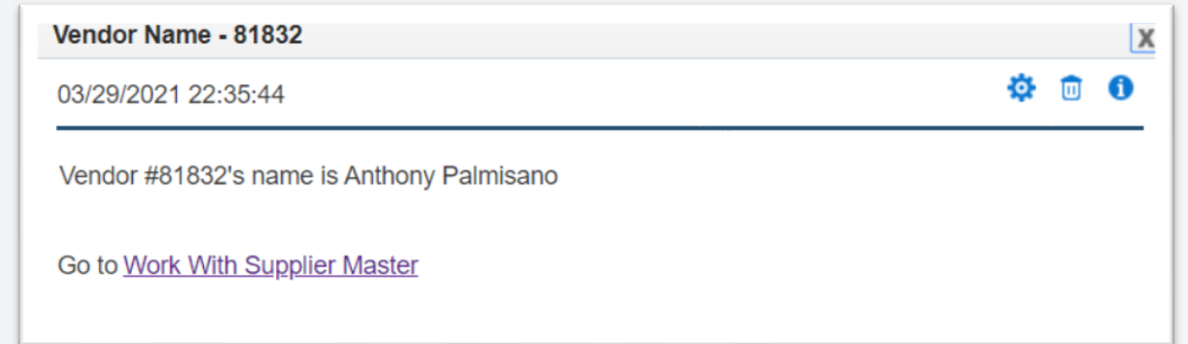
Notifications Types

- **Simple Notification:**
 - send reminders or updates
 - include shortcuts to applications
 - not dependent on any business event tied to the data
- **Watchlist-based Notification:**
 - use existing Watchlists
 - include threshold levels, counts, and application shortcuts to subscribers.
- **Orchestration-based Notification:**
 - use all of the functionality available in an orchestration and proactively deliver the data to subscribers in a notification message.

The screenshot displays the Oracle JD Edwards EnterpriseOne Orchestrator Studio interface. The title bar reads "ORACLE® JD Edwards EnterpriseOne Orchestrator Studio". The breadcrumb navigation shows "Home > Notifications > untitled". Below the navigation, there are input fields for "Name" and "Description". A "Type" dropdown menu is open, showing options: "Simple", "Orchestration", and "Watchlist". To the right of the dropdown are two toggle switches: "Run As Subscriber" and "Allow Subscriber Overrides". Below these are four expandable sections: "No...", "Rul...", "Message", and "Schedule".

How They Work

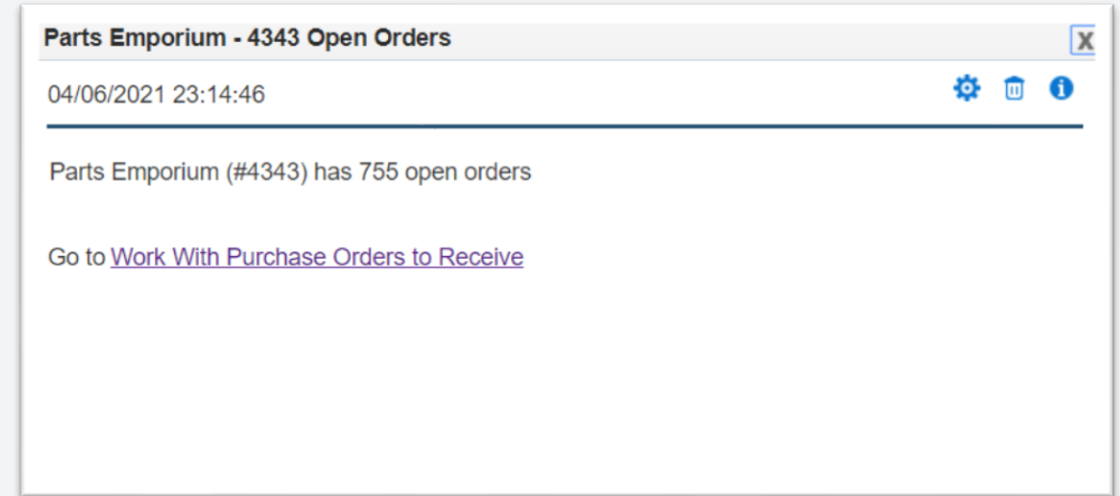
- Take inputs from data collected
- Use Rule to determine how to handle inputs
- Define where the inputs are used
 - Body text
 - Subject text
 - Data selection for action
- Create actions hyperlinked to applications, queries, or attachments



Setting Up a Notification

Example Use Case

- Need to know how many open purchase orders for a supplier
- Currently have an orchestration set up to pull open POs
- Want this information from the Supplier Master or Address Book screen
- Will attach to a button on a Form Extension



Creating a Simple Notification

- Run As Subscriber:


- Runs for each individual user subscribed.
- If you do not select this option, it will run once with the user information of the person who starts the notification job and all subscribers will receive the same notification message.


- Allow Subscriber Overrides :

- Give subscribers the ability to enter override values for the notification inputs in Subscription Manager.

Notification

Name **GT_NTFY_Anthony_032921_0001**

Description 

Type Simple ▼ Run As Subscriber ☒ Allow Subscriber Overrides ☒  Test

Defining Inputs

- Use inputs to define the configuration of the notification
- Inputs can be used throughout a notification
- Map inputs as with any other orchestrator component
- Simply name them in the Notification Input section; use them elsewhere with `${ }`

Notification Inputs				
Name	Value Type	Default Value	Required	
Orders	String		<input type="checkbox"/>	×
AN8	String		<input type="checkbox"/>	×
AlphName	String		<input type="checkbox"/>	×
	String		<input type="checkbox"/>	×

Creating the Message

- Outputs are the same as Inputs
- Output type can be String, Watchlist, Numeric, Boolean
- Write message subject and body as desired
- Include variables using \${ }

▲ Message

Output

Output Type

Subject

Body

Supplies Unlimited - 3090 Open Order(s)

04/12/2021 20:51:44

Supplies Unlimited (#3090) has 3 open orders

Go to [Work With Purchase Orders to Receive](#) <--- Click Here

Creating the Links to Applications

Application Links - 1

+ Add

Work With Purchase Orders to Receive

Application

P4312

Form

W4312F - Work With Purchase Orders to Receive

Version

ZJDE0001 - Receipts by Purchase Order

Personal Form

Query

Watchlist

Pre Text

Go to

Link Text

Work With Purchase Orders to Receive

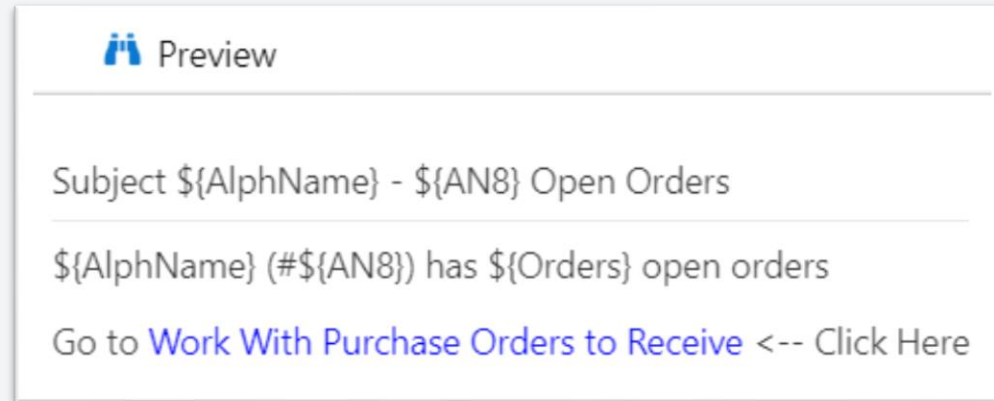
Post Text

<-- Click Here

ID	Name	Description	Literal	Form Interconnected Value
1	DocumentOrderInvoiceE	Document (Order No, Invoice, etc.) (DOCO)	<input type="checkbox"/>	▼
2	OrderType	Order Type (DCTO)	<input type="checkbox"/>	▼
3	CompanyKeyOrderNo	Order Company (Order Number) (KCOO)	<input type="checkbox"/>	▼
4	OrderSuffix	Order Suffix (SFXO)	<input type="checkbox"/>	▼

Preview Notification

- Click Preview
 - Subject
 - Body
 - Pre Text
 - Link Text
 - Post Text



Additional Actions

- Include links to:
 - Orchestrations
 - Other Notifications
 - URLs
 - Reports (via link)
- Can define Schedule

The screenshot displays the 'Additional Actions' configuration window. It features a top section with a title bar and an 'Add' button. Below this, there are three main sections: 'Attachments - 1', 'New Shortcut', and 'Schedule'. The 'Attachments - 1' section includes a 'Send As Link' toggle switch and a table with columns for 'Literal', 'Link Text', 'Job Number', 'Server', and 'File Type'. The 'New Shortcut' section has a 'Type' dropdown menu with options: 'Select Type', 'Orchestration', 'Notification', and 'URL'. The 'Schedule' section is currently empty. The bottom of the window shows a table with columns for 'Literal', 'Link Text', 'Job Number', 'Server', and 'File Type', with a 'PDF' file type selected in the last row.

Literal	Link Text	Job Number	Server	File Type
<input type="checkbox"/>		<input type="checkbox"/>		PDF

End Product

Supplies Unlimited - 3090 Open Order(s)

04/12/2021 20:51:44

Supplies Unlimited (#3090) has 3 open orders

Go to [Work With Purchase Orders to Receive](#) <--- Click Here

UDO Security

Work with User Defined Objects

- In Orchestrator, components can be Requested to Publish
 - changes status of UDO from 02 (Editing) to 05 (Pending Approval)
- P98220U (Work with User Defined Objects)
 - Row>Advanced>Request to Publish (02 to 05)
 - Row>Approve/Share (05 to 08 [Shared])

Work with User Defined Objects

Personal Form: (No Personalization) Layout: (Nc

✓ 🔍 🗑️ ✖️ 🔄 Form ⏏️ Row ⚙️ Tools

User Defined Object Status
User Defined Object Type

View User Defined Objects On:
☒ All User Defined Objects
☐ Reserved User Defined Objects

Records 1 - 1

	Date Modified	Short Description	User Defined Object Type	Type Description	User Defined Object Status	Status Description
<input checked="" type="checkbox"/>	04/12/2021	GT_NTFY_Anthony_032921_00...	NTF	Notification	08	Shared

UDO Security




- P98220U (Work with User Defined Objects)
 - Row>Advanced>Security
- Click Revise View Security
- Enter Role
- Click Red Box to Make Green Circle
- Click Save (disk)





View Security for User Defined Object **Revise View Security**




User Defined Object Information

Object Type Notification

Object Name NTF_2103290001JDELAB

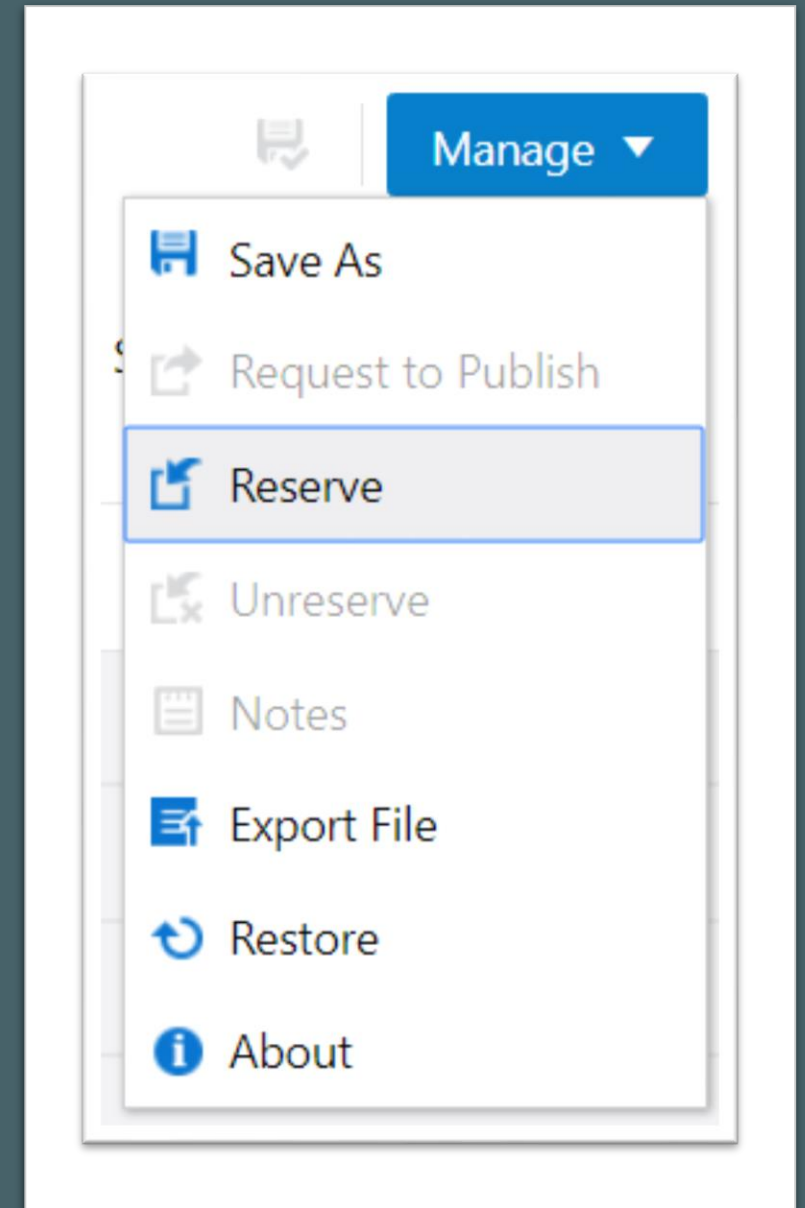
  

Records 1 - 2    

		User / Role	User / Role Name	View
<input checked="" type="radio"/>		GTNTFTEST	GT Notification Testing Role	
<input type="radio"/>				

Making UDO Changes

- After UDOs approved/shared, must Reserve object to make changes
- In Orchestrator Reserve object
- After changes made, Save object and Request to Publish
- In P98220W, Approve/Share again
 - no need to change security if no changes required.



Subscribing to a Notification

Requirements

- Objects must be approved
- Objects must be shared by role

View Security for User Defined Object [Revise View Security](#)

User Defined Object Information

Object Type: NTF Notification

Object Name: GT_NTFY_Anthony_032921_0001 NTF_2103290001JDELAB

Records 1 - 2

	User / Role	User / Role Name	View
<input checked="" type="radio"/>	GTNTFTEST	GT Notification Testing Role	
<input type="radio"/>			

work with user defined objects Personal Form: (No Personalization) Layout: (N)

User Defined Object Status: **Favorites**

User Defined Object Type: **Row**

View User Defined Objects On: **Preview**

☒ All User Defined Objects ☐ Reserved User Defined Objects

Records 1 - 1


Date Modified	Short Description	User Defined Object Type	Type Description	User Defined Object Status	Status Description
04/12/2021	GT_NTFY_Anthony_032921_0001 NTF_2103290001JDELAB	NTF	Notification	08	Shared

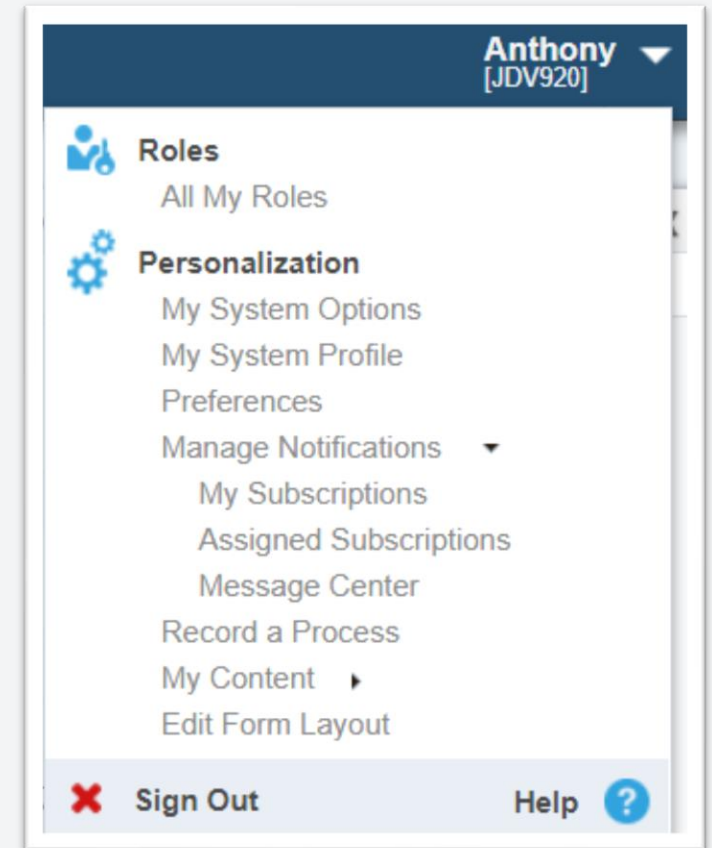
Accessing Available Notifications

- Under User Personalization>Manage Notifications>Assigned Subscriptions
- Assigned Subscription Manager
 - Click +
- Search for Shared Notification

Assigned Subscription Manager

+ Add Subscription Close

Show 



Configuring Subscription

- Notification List – display under Bell icon
- Work Center – send through or via email through WC
- Subscriber List – Add Role(s)
- Inputs can be overridden individually

☒ Allow Subscribers to Opt Out

Configuration

Notification Name: GT_NTFY_Anthony_032921_0001

Notification Description: Open Orders

Subscription Name:

Delivery Methods: ☒ Allow Subscribers to Override

☒ Notification List

☐ Work Center

Subscriber List:

☐ Everyone

Inputs

☒ Allow Subscribers to Override

Name	Default Value	Override	Override Value
Orders		<input type="checkbox"/>	
AN8		<input type="checkbox"/>	
AlphName		<input type="checkbox"/>	

Testing a Notification

Testing

- After Notification shared, secured, and subscribed to
- Run Orchestration from Studio
- Will execute Notification in web client


Parts Emporium - 4343 Open Order(s)

04/12/2021 21:58:09

Parts Emporium (#4343) has 755 open orders

Go to [Work With Purchase Orders to Receive](#) <--- Click Here

► Input Job Queue Default ▼ Job

▲ Output  Status: OK (200) Time: 1.388 Seconds

```
{
  "GT_DREQ_Anthony_0014_OpenPOs": {
    "tableId": "F4311",
    "rowset": [
      {}
    ],
    "records": 1,
    "moreRecords": false
  }
}
```

Assign to Form Extension Button

- Find proper form
- Click Form Extension Button
- Drag Button to Form & Rename



Work With Addresses

✓ 🔍 + 📄 🗑️ ✕ ⌵ Row 📎 Report ⚙️ Tools

Alpha Name ☐ Display Phone

Search Type * ☐ Display Address

Open POs

No records found. Show All Columns

<input type="checkbox"/>		Address Number	Alpha Name	Address Line 1
--------------------------	--	----------------	------------	----------------

Form Extension Manager

📄 ➡️ 🔍 🗑️ 📄 📅

Name ▼

Edit Tab Sequence ☐

[Associate Orchestrations](#)

Add Button Manage Exits

Available Business View Columns **Extension Only**

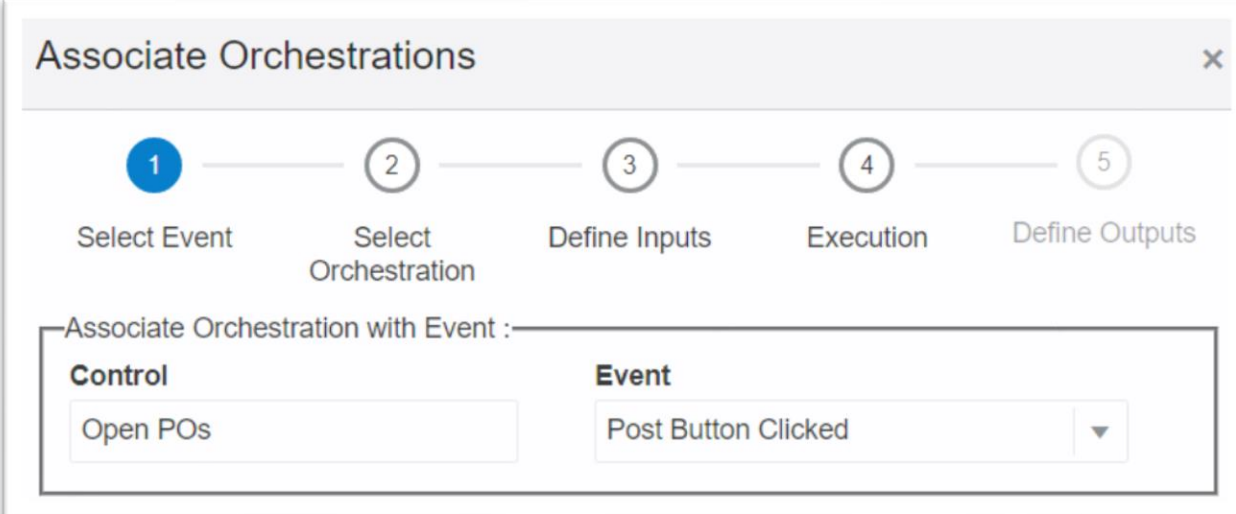
Select Business View : ▼

Work With Addresses [V0101E]

☒ Form ☐ Grid

Assign to Form Extension Button (cont)

- Click Associate Orchestration
- Click *Select Control*
- Click on Button, choose Post Button Clicked
- Click Next



Associate Orchestrations

1 — 2 — 3 — 4 — 5

Select Event Select Orchestration Define Inputs Execution Define Outputs

Associate Orchestration with Event :

Control	Event
Open POs	Post Button Clicked ▼

Assign to Form Extension Button (cont)

- Select Orchestration
 - Click Next
- In Define Inputs, click in Mapping Input field
 - Select field to map to
- Click Next

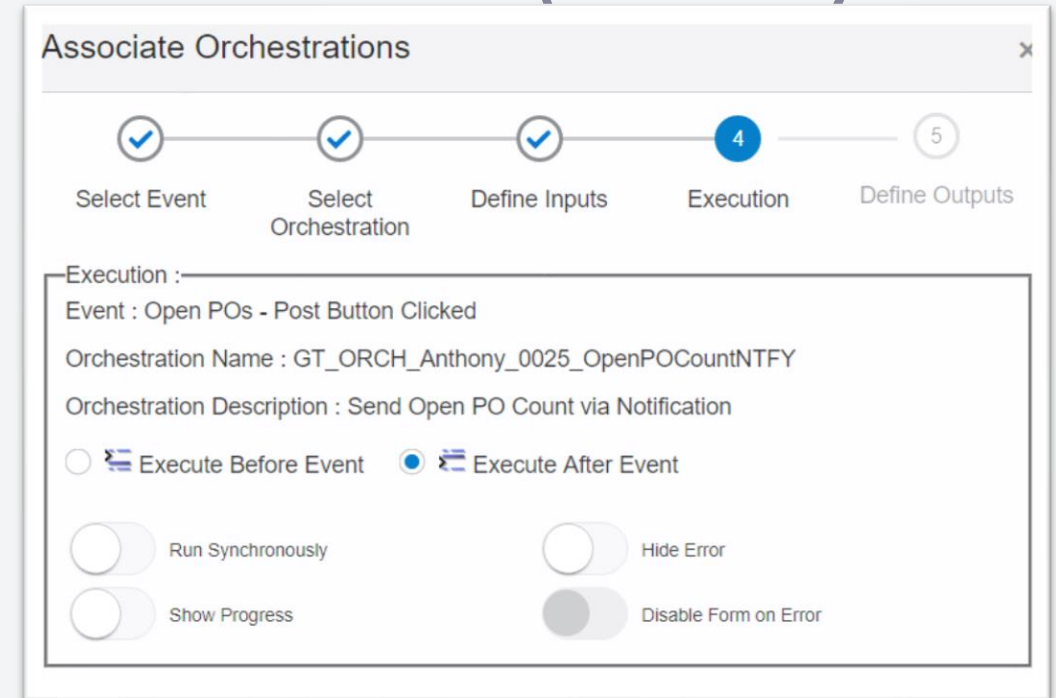
The dialog box titled "Associate Orchestration" shows a progress bar with five steps: 1. Select Event (checked), 2. Select Orchestration (active), 3. Define Inputs, 4. Execution, and 5. Define Outputs. Below the progress bar, the "Orchestration Name" is set to "GT_ORCH_Anthony_0025_OpenPOCountNTFY" and the "Orchestration Description" is "Send Open PO Count via Notification".

The dialog box titled "Associate Orchestration" shows a progress bar with five steps: 1. Select Event (checked), 2. Select Orchestration (checked), 3. Define Inputs (active), 4. Execution, and 5. Define Outputs. Below the progress bar, the "Define Inputs" section contains a table with one row for "Address Number 1".

Name	Mapping Input	Default Value	Allow Empty
Address Number 1	AddressNumber	String	<input type="checkbox"/>

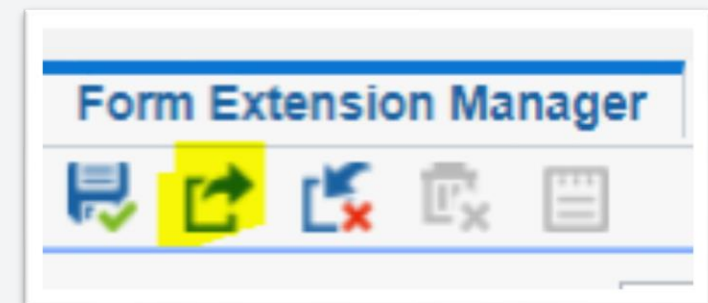
Assign to Form Extension Button (cont)

- Define Execution
 - Click Save
- Request to Publish on Form Extension Manager
- Navigate to P98220U to Approve/Share Form Extension
- Share Form Extension via Row>Advanced>Security



The 'Associate Orchestrations' dialog box shows a progress bar with five steps: Select Event, Select Orchestration, Define Inputs, Execution (current step, marked with a blue circle and number 4), and Define Outputs (marked with a grey circle and number 5). Below the progress bar, the 'Execution' section is expanded, showing the following details:

- Event : Open POs - Post Button Clicked
- Orchestration Name : GT_ORCH_Anthony_0025_OpenPOCountNTFY
- Orchestration Description : Send Open PO Count via Notification
- Execution Timing: ☐ Execute Before Event, ☒ Execute After Event
- Run Synchronously: ☐
- Hide Error: ☐
- Show Progress: ☐
- Disable Form on Error: ☒



Final Product

The screenshot displays the JD Edwards software interface. The main window is titled "Work With Addresses" and features a search bar with "Alpha Name" and "Search Type" set to "C" (Customers). Below the search bar is a table of records. The table has columns for "Address Number" and "Alpha Name". The records are:

Address Number	Alpha Name
500	Gas StationA
1288	Hardware Supplies
3001	Global Enterprises

The record for "1288 Hardware Supplies" is selected. A pop-up window titled "Hardware Supplies - 1288 Open Order(s)" is displayed over the table. The pop-up window shows the date "04/12/2021 22:11:24" and the message "Hardware Supplies (#1288) has 0 open orders". Below the message is a link that says "Go to [Work With Purchase Orders to Receive](#) <--- Click Here".

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Session ID:

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Hear more from Grant Thornton

Tuesday

- **Options for configuring project cost detail within JDE** | Craig Davied | 3:00 p.m. ET
- **8 easy steps to evaluate the effectiveness of your EAM/CAM asset maintenance program** | Steve Yniguez | 4:15 p.m. ET

Wednesday

- **Where are all my orchestrators at? Let's take a look at notifications and UDO security** | Anthony Palmisano and Mohammad Shujaat | 9:15 a.m. ET
- **Import thousands of Invoices from your AP automation platform into JDE in seconds!** | David Kratzke and Mohammad Shujaat | 9:15 a.m. ET
- **Auto tendering transportation Carriers in JD Edwards** | Craig Davied | 1:15 p.m. ET
- **Positive pay 2.0: Now with 100% more orchestrations** | Mohammad Shujaat and Rick Snell, Murphy USA | 5:00 p.m. ET

Thursday

- **Realizing joint ventures in JDE** | Craig Davied | 9:15 a.m. ET
- **Workflow options with JD Edwards Orchestrator** | Dwight Moore and Anthony Palmisano | 12:15 a.m. ET
- **Automating currency exchange rates using JD Edwards & orchestrator** | Mohammad Shujaat and Anthony Palmisano | 2:15 p.m. ET



Visit our virtual booth

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

- **We are the champions (of Orchestrator)!**
2:00 p.m. ET
- **Happy hour at The Masters**
5:15 p.m. ET

Wednesday

- **Back to the future with JD Edwards**
12:15 p.m.
- **Leaving the world behind.....quickly**
4:15 p.m.

Thursday

- **Lessee accounting: Where are we now?**
1:15 p.m.



At Quest, you belong.

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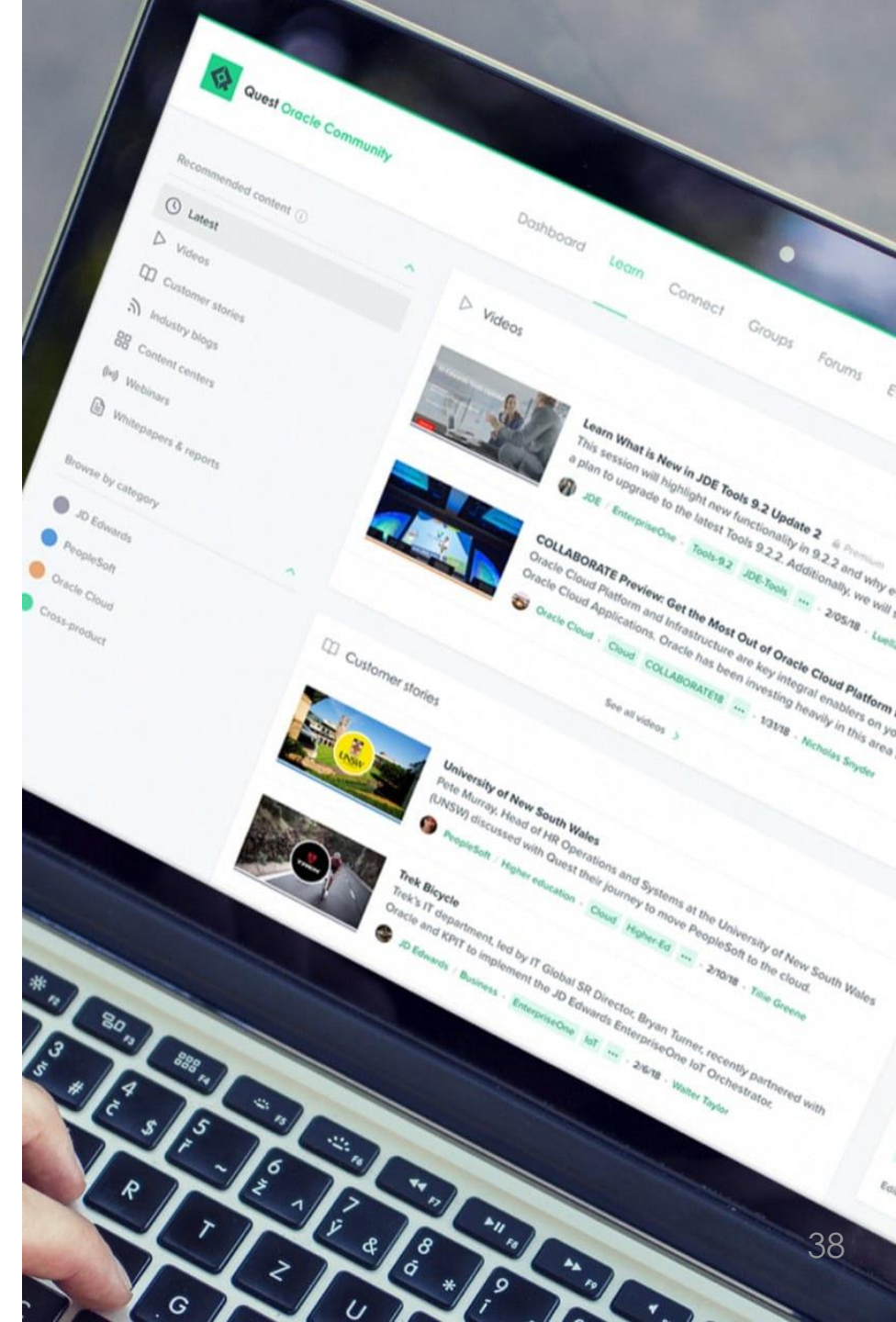
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