



Workflow Options with JD Edwards Orchestrator

Presented by:

Dwight Moore, Grant Thornton LLP.

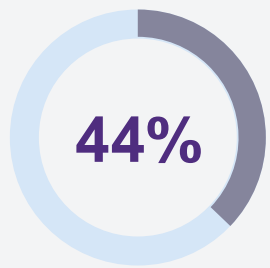
Session ID

2021JDEENV-101680

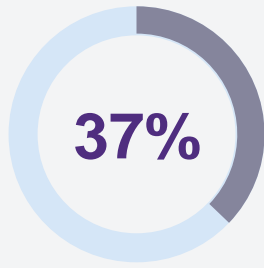
About Grant Thornton

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.

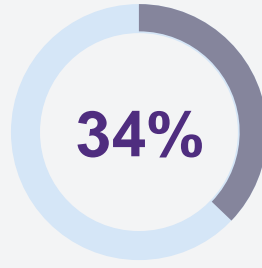
Who we serve:



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
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**

Dwight Moore



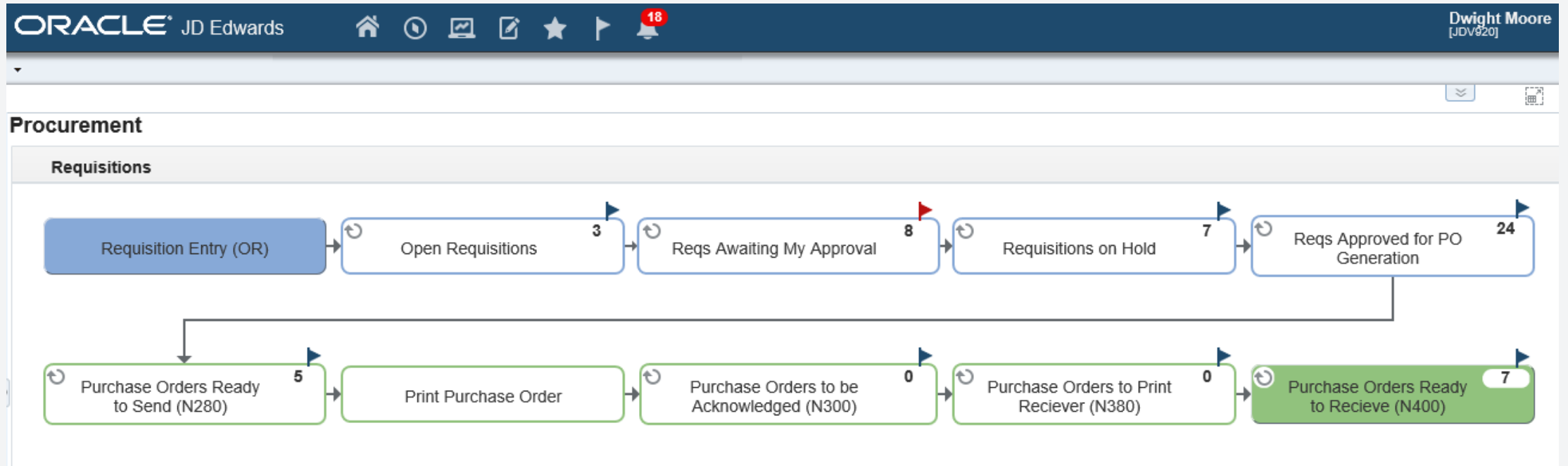
- JD Edwards Manufacturing & Distribution
 - Procurement, Transportation, Sales, Manufacturing
 - Advanced Pricing, Orchestrator, UDOs
- Industries
 - Manufacturing, Mining, Pharmaceuticals, Oil & Gas, Recycling & Waste Management...
- Experienced speaker at OpenWorld, InFocus, Collaborate, and SIG user groups
- Interests:
 - BBQ/Cooking, Fly Fishing, Home Renovation...

Agenda

- **Workflow Discussion**
- Workflow in JD Edwards
- Example 1: Procurement Process
- Example 2: Address Book
- Q&A



Example 1: Automated workflow with Orchestrations



Example 2: Address Book

ORACLE® JD Edwards Moore, Dwight [JDV920]

Work With Addresses Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

✓ 🔍 + 📄 🗑️ ✕ ⋮ Row 📄 Report ⚙️ Tools

Alpha Name ☐ Display Phone
Search Type * ☐ Display Address

Records 1 - 1

		Alpha Name	Long Address	Industry Class	Sch Typ	Tax ID	User Reserved Code
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Address Number					
<input checked="" type="checkbox"/>		9000001	Moore, Dwight		CON		

Why This Session On Workflow?

- Save you unnecessary expenses
- Goal of this session is to Clarify what workflow capabilities are/are not available in JD Edwards
- Show you examples of different types of workflow using JD Edwards tools

Process vs Workflow

A process is the logical steps to complete a task

A workflow includes controls around a process that allow the process to be automated, analyzed, and accurate.

What Should a good Workflow Do?

- Streamline processes = Fewer mistakes and missed deadlines
- Automate simple tasks = Increase efficiency
- Capture metrics for analysis = Stronger accountability
- Connect processes = Better business communication
- Provide process visibility = Exposed bottlenecks

Promote continuous improvement



JD Edwards has all the building blocks

- Integrated system
- Scheduling of batch jobs
- Logical process with status progression
- Audit trails
- Transaction dates

Agenda

- Workflow
- **Workflow in JD Edwards**
- Example 1: Procurement Process
- Example 2: Address Book
- Q&A



Workflows Available in JD Edwards

- Standard Workflow
(OMW Workflow Modeler)
- UDO - Watchlist, Queries
- Orchestrator Notifications
- Orchestrator and UDO
- Orchestrator Workflow Automation



What should not be expected of JD Edwards workflows

- Multi System Workflow
 - Service Desk tickets routed to ERP users or PLM users.
 - PLM updates routed back to ERP users.
 - QMS updates to ERP vice versa.
- Notifying or routing actions to non system users








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JD Edwards Process on E1 Page

ORACLE[®] JD Edwards



Dwight Moore
[JDV920]

Procurement

Requisitions

Requisition Entry (OR)

Review Requisitions

Requisitions Awaiting Approval

Requisition Hold Release

Generate PO from Req

Purchase Order Inquiry

Print Purchase Order

Capture Purchase Order Acknowledgement

Print Purchase Order Receiver

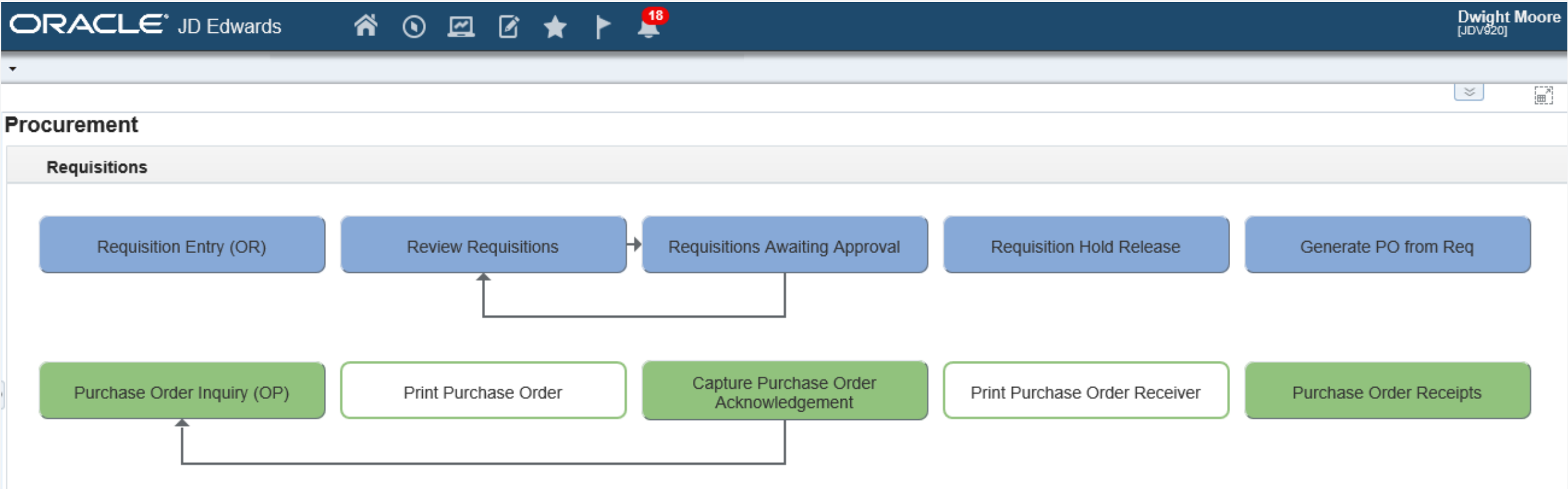
Purchase Order Receipts

JD Edwards Delivered Workflow

- What is it?
 - JD Edwards delivered workflows are prebuilt process workflows that trigger pop up warnings and email notifications based on system events.
 - Price change approval, Credit limit revisions, Purchase order acknowledgment approval
 - Many others – Oracle maintains a list of workflow's and descriptions of each in the attached document (JDE Workflows)
- Pros:
 - Pre defined for common system events
- Cons:
 - Technical ability to activate and configure.
 - Often customized



JDE Delivered Workflow



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Simple Process Workflow using Watchlists

One simple method of creating a workflow is using watchlists to track process events.

No Automation, rather it is a method to track or analyze

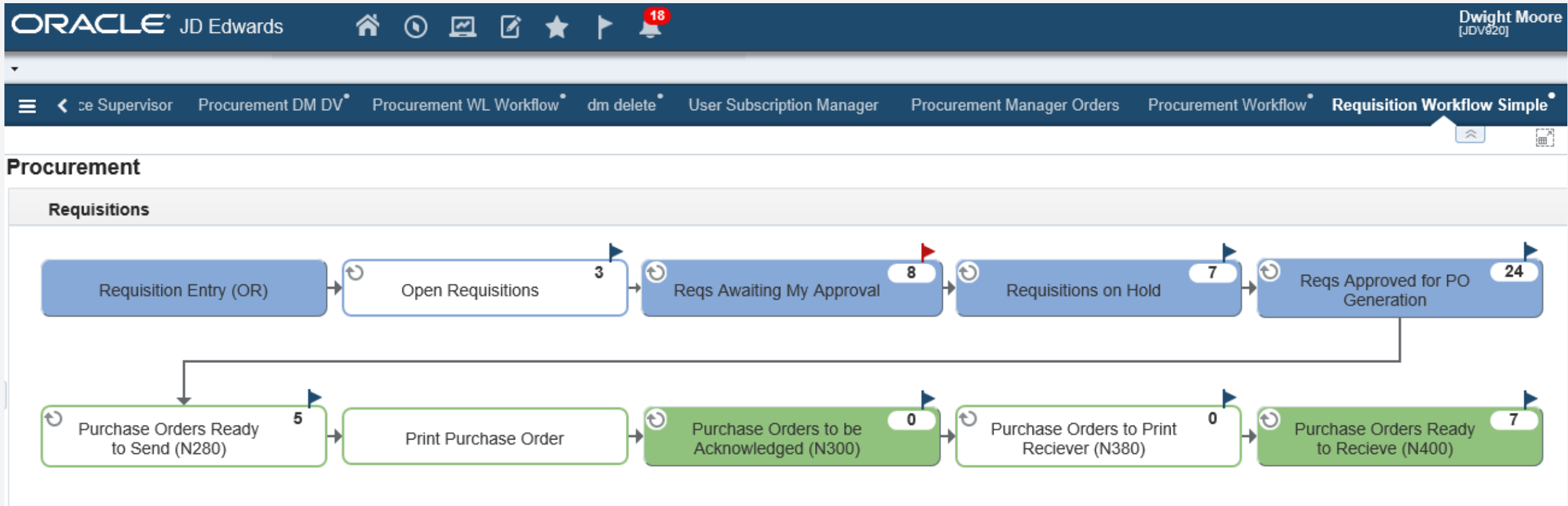
Pros:

- Simple to create
- Ability to track process statuses with a single click

Cons:

- User must be in JD Edwards
- No external notification
- No automation

Watchlist Workflow



Workflows Available in JD Edwards

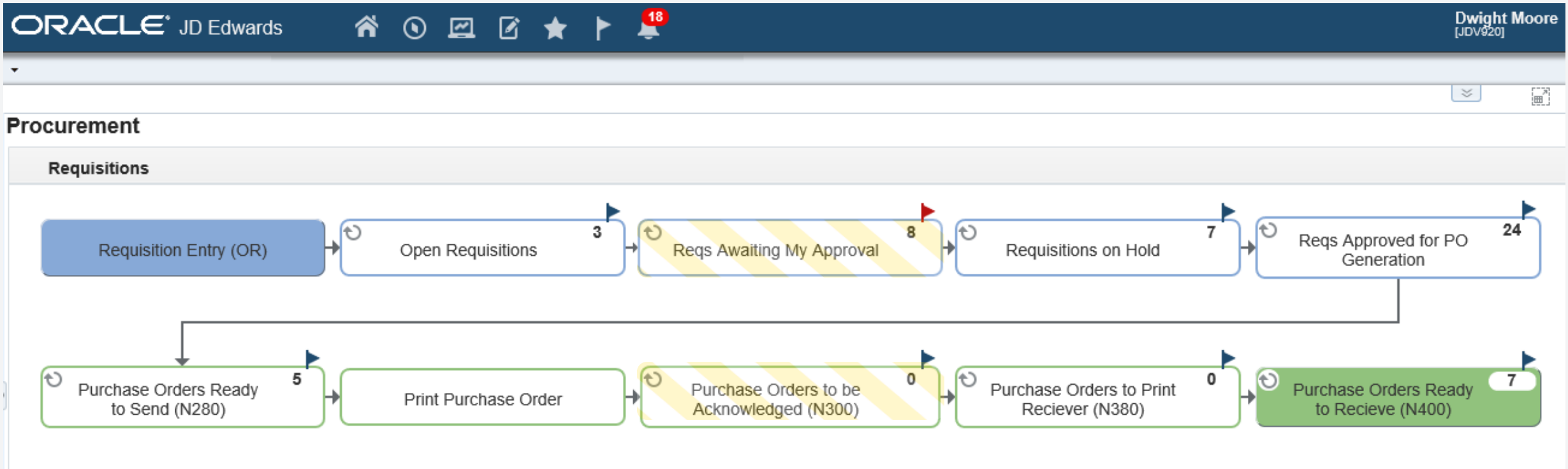
- Standard Workflow
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- UDO - Watchlist, Queries
- **Orchestrator Notifications**
- **Orchestrator and UDOs**
- Orchestrator Workflow Automation



Automated Workflow with Orchestrator

- Using the standard components of orchestrator and UDOs we can create an automated workflow that competes with best of breed workflow software.
- Already see the quick analysis watchlists provide.
- With Notifications we can send email/texts to approvers.
- With Notifications we can send approve/reject responses to buyers.

Automated workflow with Orchestrations



Orchestrator

What is Orchestrator? Dwight's simple explanation

3 main things

- External Connections to JD Edwards
 - APIs, flat file...
- JD Edwards Automation
 - Form Requests, Data requests, Report Requests, Rules
- Internal/External Notifications
 - Notifications

Components Available in JD Edwards

UDOS

- Form Personalization
- Form Extension
- UXOne
- E1 Page
- Composer Page
- Watchlists
- Query
- CafeOne
- OneView

Orchestrator

- Form Request
- Data Request
- Report Request
- Rules
- Notifications
- Connections
- Connectors
- Whitelist
- Custom Service Request
- Cross References
- Schedules



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Components Available in JD Edwards

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- OneView
- **NEW** Form Extension Enhancements

Orchestrator

- Form Request
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- Rules
- Notifications
- Connectors
- Whitelist
- Custom Service Request
- Cross References
- Schedules
- **NEW** System Automation



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Orchestrator Unlocks a new World of Workflow within JD Edwards

2 examples, endless possibilities

- Linear Workflow for JD Edwards Processes
 - Procurement process: Enter, Approve, Send, Acknowledge, Receive, Inspect, Move
- Non linear Workflow for Master Data setup
 - Address Book Setup: Enter, Route, Review, Edit, Activate

Workflows Available in JD Edwards

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- Orchestrator Notifications
- Orchestrator and UDO
- **Orchestrator Workflow Automation**

Examples

- Example 1: Procurement Process
- Example 2: Address Book



Workflows Available in JD Edwards

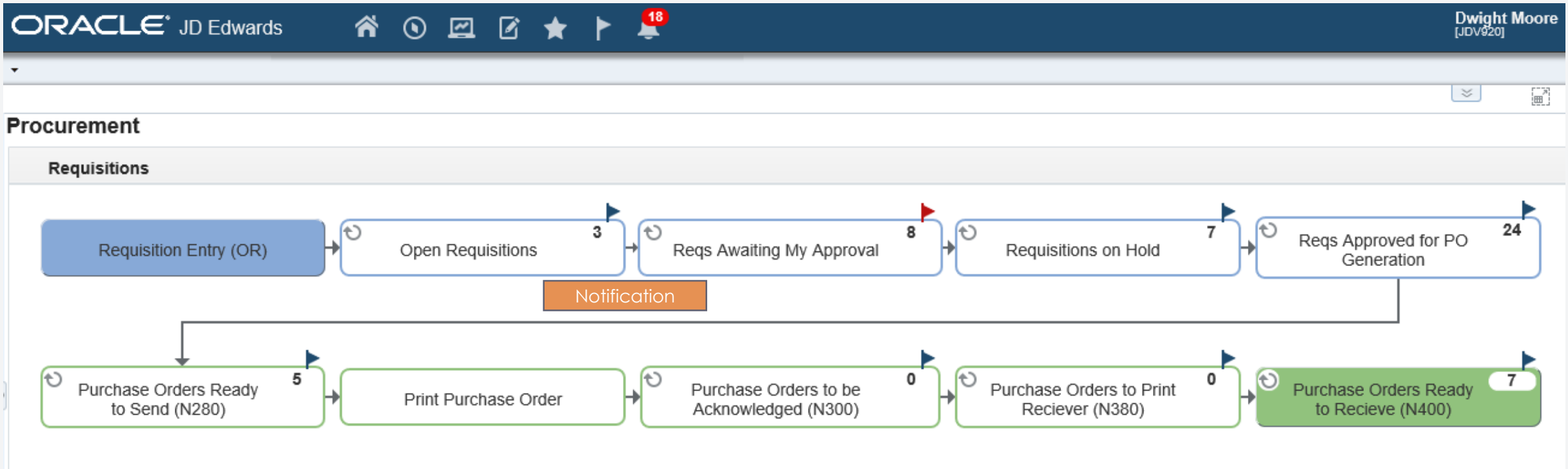
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Examples

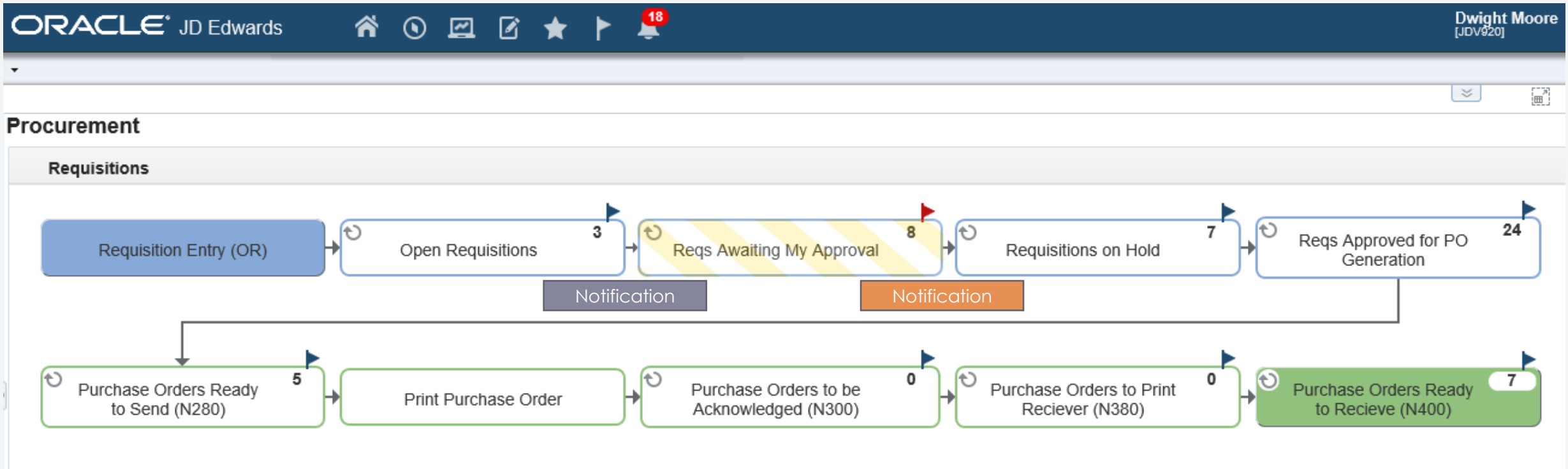
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- Example 2: Address Book



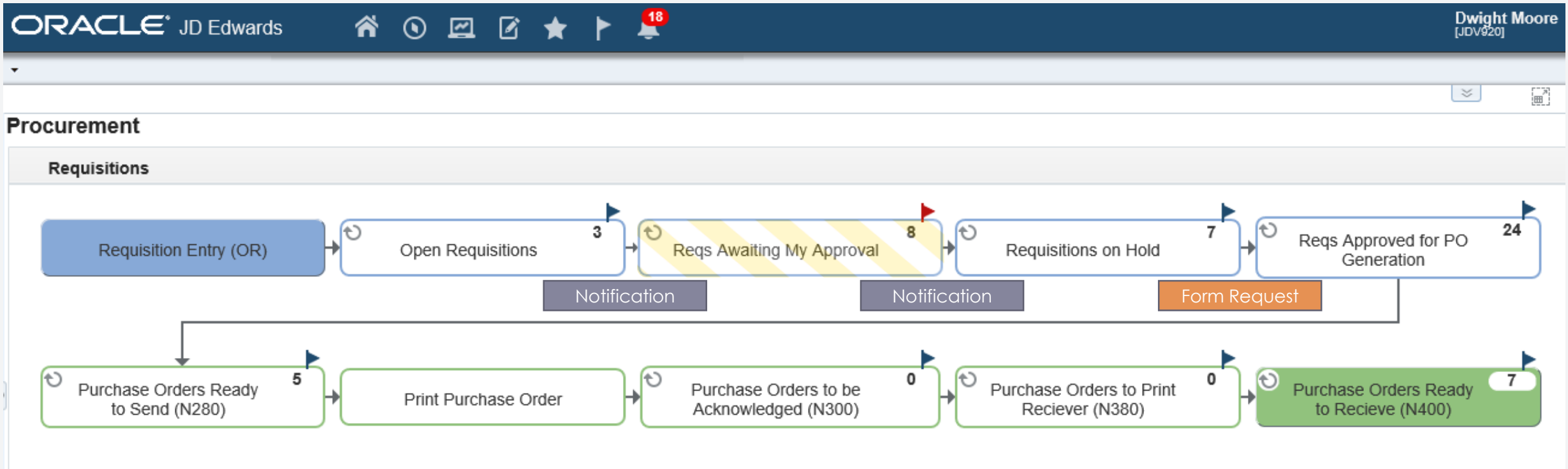
Automated workflow with Orchestrations



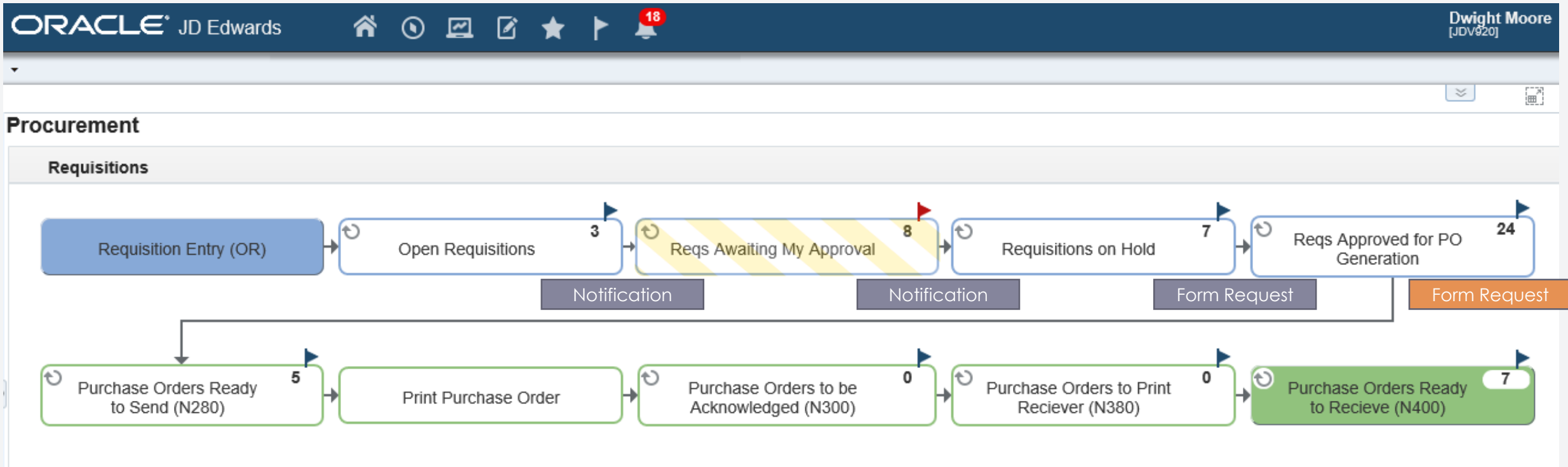
Automated workflow with Orchestrations



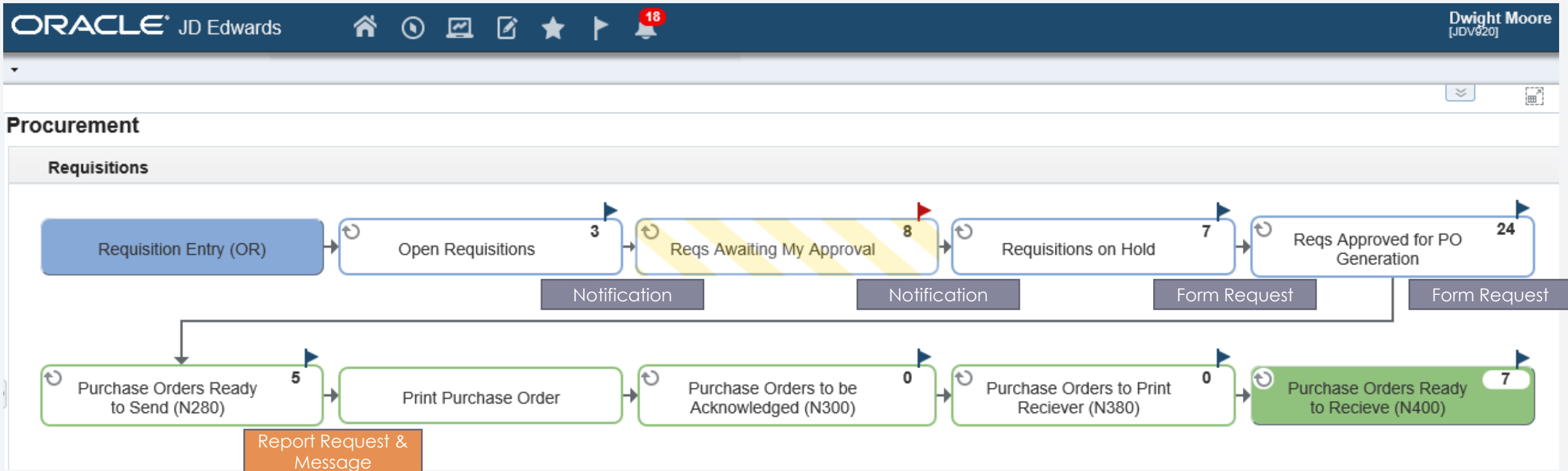
Automated workflow with Orchestrations



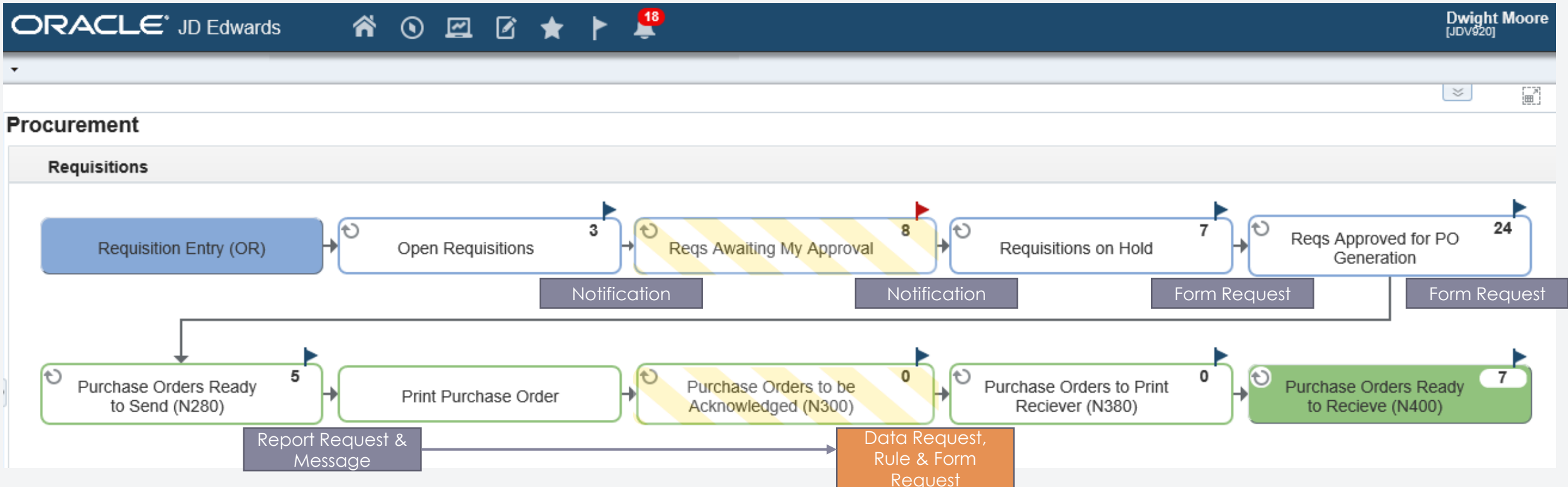
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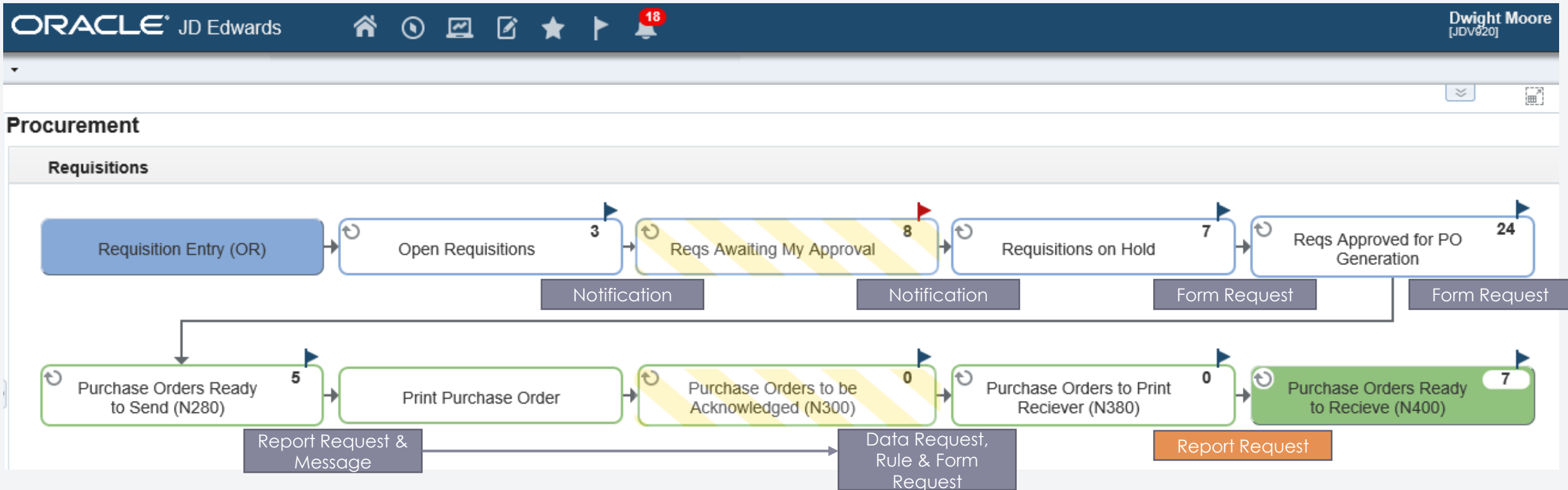
Automated workflow with Orchestrations



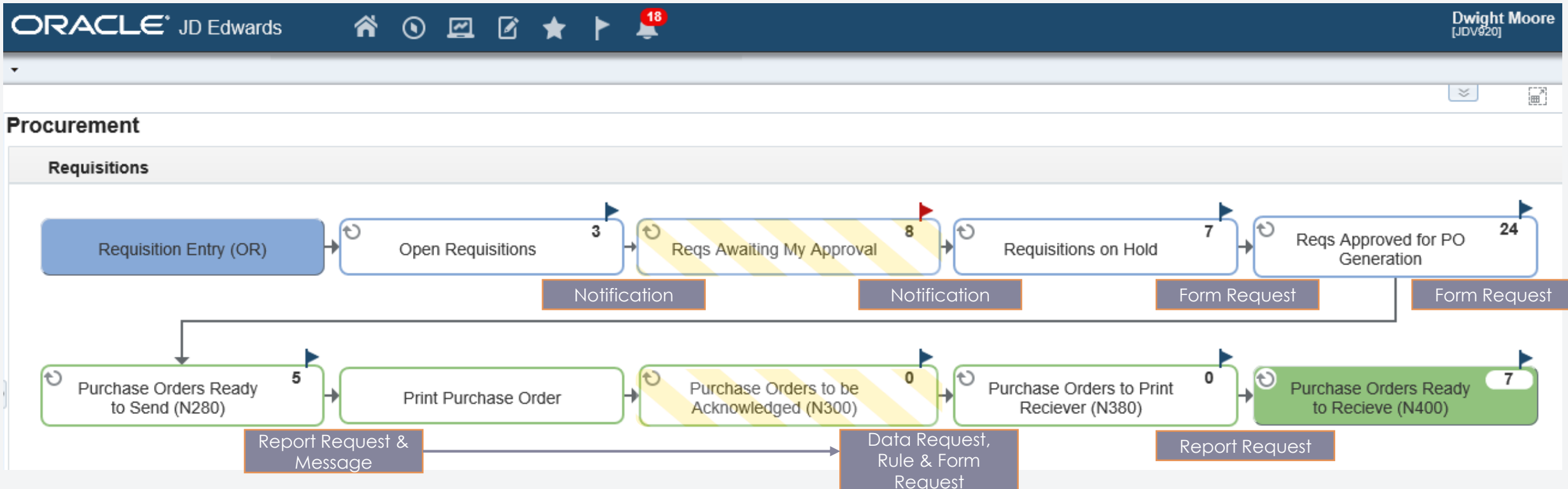
Automated workflow with Orchestrations



Automated workflow with Orchestrations



Automated workflow with Orchestrations



- Apply these principles to Order Activity Rules in other areas: Sales, Manufacturing. Statuses in receipt routing, fixed assets...

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- **Orchestrator Workflow Automation**

Examples

- Example 1: Procurement Process
- **Example 2: Address Book**



Example 2: Address Book

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Work With Addresses Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

✓ 🔍 + 📄 🗑️ ✕ ⋮ Row 📄 Report ⚙️ Tools

Alpha Name ☐ Display Phone
Search Type * ☐ Display Address

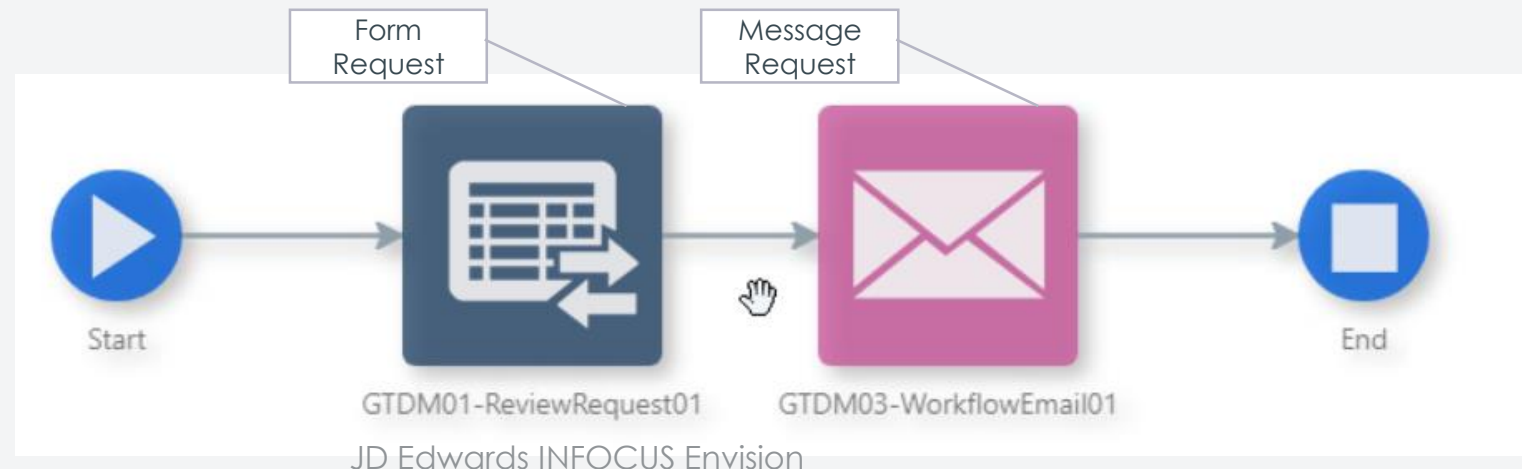
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<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Address Number					
<input checked="" type="checkbox"/>		9000001	Moore, Dwight		CON		

Send to CE Send to AR Send to Pricing Send to Tax Approve Activate Deactivate

Example 2: Address Book

- **Business Challenge:** Customer requires multiple departments to provide input when setting up a new address book record. Currently using a manually email process to route new addresses through setup between departments.
- **Solution:**
 - Used Form Extension to expose “user reserved code” in P01012 grid
 - Used Personal Forms to add routing buttons
 - Used Orchestrator to update the status of the address record and send a notification email to the next responsible department when the Routing Button is clicked



Example 2: Address Book

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Moore, Dwight
[JDV920]

Work With Addresses

Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

✓ 🔍 + 📄 🗑️ ✕ ⌵ Row 📄 Report ⚙️ Tools

Alpha Name

Search Type

☐ Display Phone
☐ Display Address

Records 1 - 1

✓	🔍	Address Number	Alpha Name	Long Address	Industry Class	Sch Typ	Tax ID
✓		9000001	Moore, Dwight			CON	

Send to CE

Send to AR

Send to Pricing

Send to Tax

Approve Activate






Deactivate

JD Edwards INEOCUS Envision

Example 2: Address Book – Personal Form

ORACLE® JD Edwards
Moore, Dwight [JDV920]

Work With Addresses

 Personal Form: (No Personalization) ▾
 Layout: (No Layout) ▾
 Query: All Records ▾
 






✓
🔍
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Row
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Report
⚙️
Tools

Alpha Name

Search Type

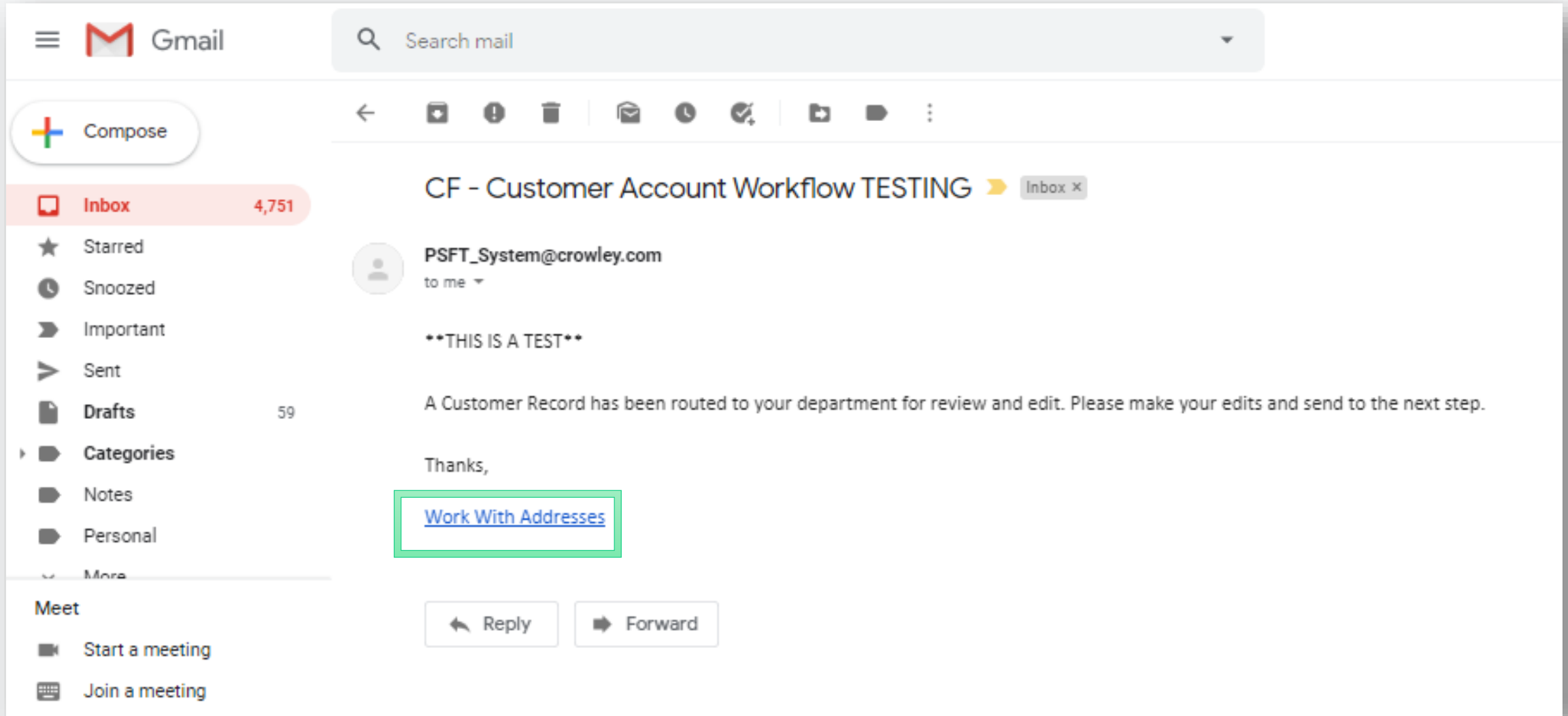
☐ Display Phone
☐ Display Address

Records 1 - 1

		Alpha Name	Long Address	Industry Class	Sch Typ	Tax ID	User Reserved Code
<input type="checkbox"/>		9000001 Moore, Dwight			CON		20

Send to CE
Send to AR
Send to Pricing
Send to Tax
Approve Activate
Deactivate

Example 2: Address Book – Email Notification



Example 2: Address Book

Form Request

Name: **GTDM01-ReviewRequest01** Product Code: **GTDM01**

Description: GTDM01-ReviewRequest01 Category: **GTDM01**

Form Request Options

1 —————

Work With Addresses

Order of Execution

	Description
≡	Address Number
≡	Find
≡	Select Row
≡	Select

Form Request

Name

GTDM01-ReviewRequest01

Description

GTDM01-ReviewRequest01

Form Request Options

1

2

Work With Addresses

Address Book Review

Order of Execution

	Description	Action	Input
≡	User Reserved Code	SetControlValue	User Reserved Code
≡	OK	DoAction	
≡	Cancel	DoAction	

Form Request

Name

GTDM01-ReviewRequest01

Description

GTDM01-ReviewRequest01

Form Request Options

1

Work With Addresses

Order of Execution

	Description	Action
≡	Find	DoAction

Form Request

Name: **GTDM01-ReviewRequest01** Product

Description: Category

Form Request Options **Add Form:** << First < Before > After >> Last ⋮ ✕ Remove

1 ————— 2 ————— 3

Work With Addresses Address Book Revision Work With Addresses

Order of Execution

	Description	Action	Input ?	Default Value
≡	Find	DoAction		
≡	Return Form Data	+		
≡	Close	DoAction		

Agenda

- Workflow
- Workflow in JD Edwards
- Example 1: Procurement Process
- Example 2: Address Book
- **Summary Q&A**



Workflow Workshop with GT?

dwight.moore@us.gt.com

- Current state processes
- Identify opportunities
- Plan Workflow
 - Identify Notifications
 - Identify Stakeholders
 - Identify Triggers
 - Identify Automation
- Present Design
- Next Steps



Orchestrator workshop

Our Orchestrator & User Experience workshop—tailored to your organization—evaluates your system and integration pain points and demonstrates how Orchestrator and usability tools can deliver immediate value. After examining your processes and bottlenecks we'll provide you with opportunities to leverage Orchestrator and leave you with a list of immediate opportunities to increase your user engagement and extract more from your JD Edwards system.



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Quick Tips & Summary

- Start Simple
- Build to better
- Analyze
- Automate

UDOS

- Form Personalization
- Form Extension
- UXOne
- E1 Page
- Composer Page
- Watchlists
- Query
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- OneView

Orchestrator

- Form Request
- Data Request
- Report Request
- Rules
- Notifications
- Connections
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- Whitelist
- Custom Service Request
- Cross References
- Schedules

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** | 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.

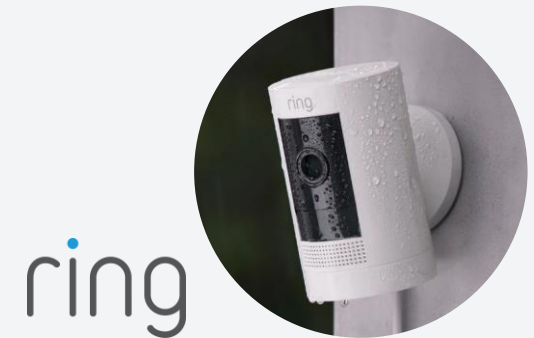


Wednesday

- **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.



At Quest, you belong.

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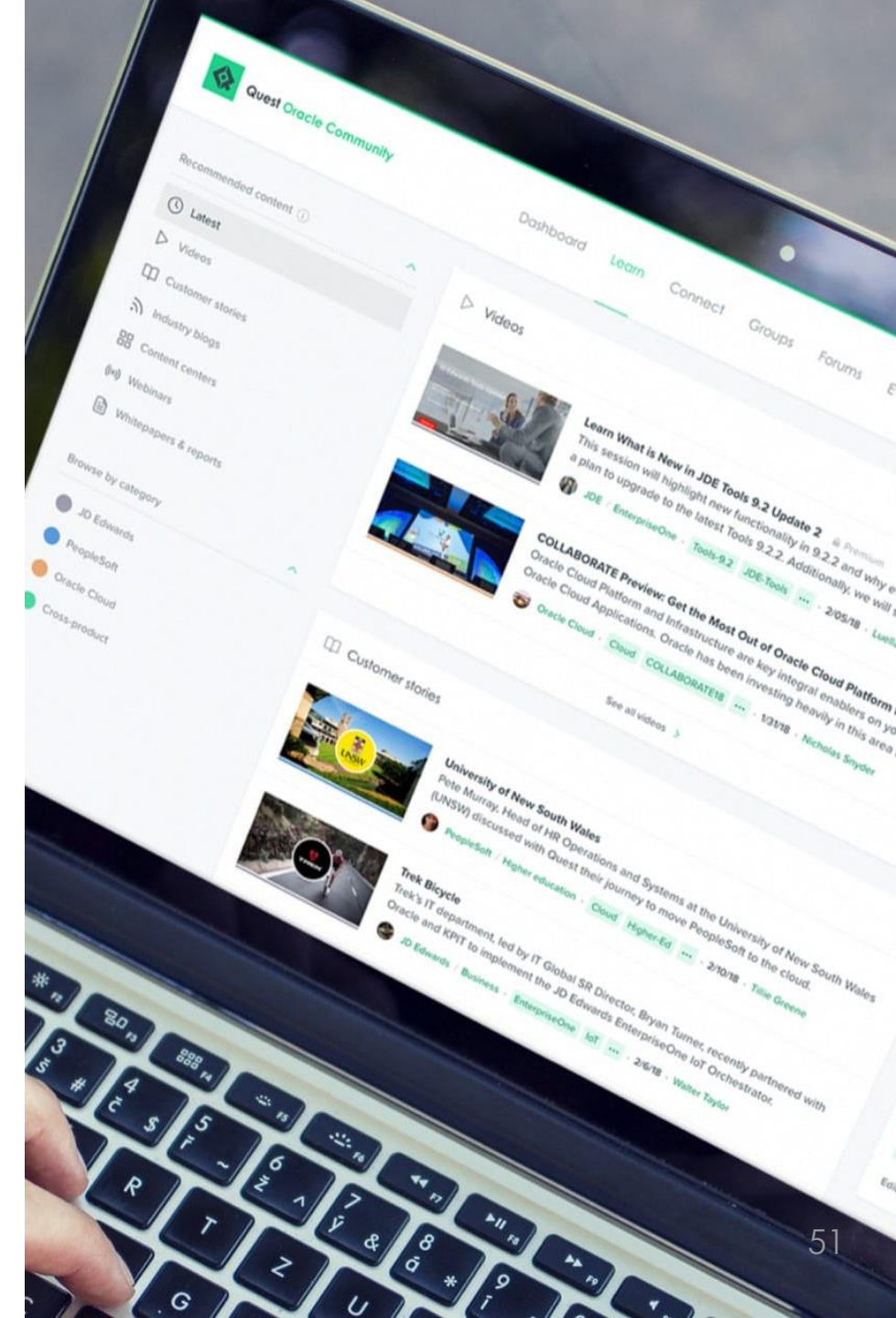
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- Increase their sphere of professional influence and advance their careers.

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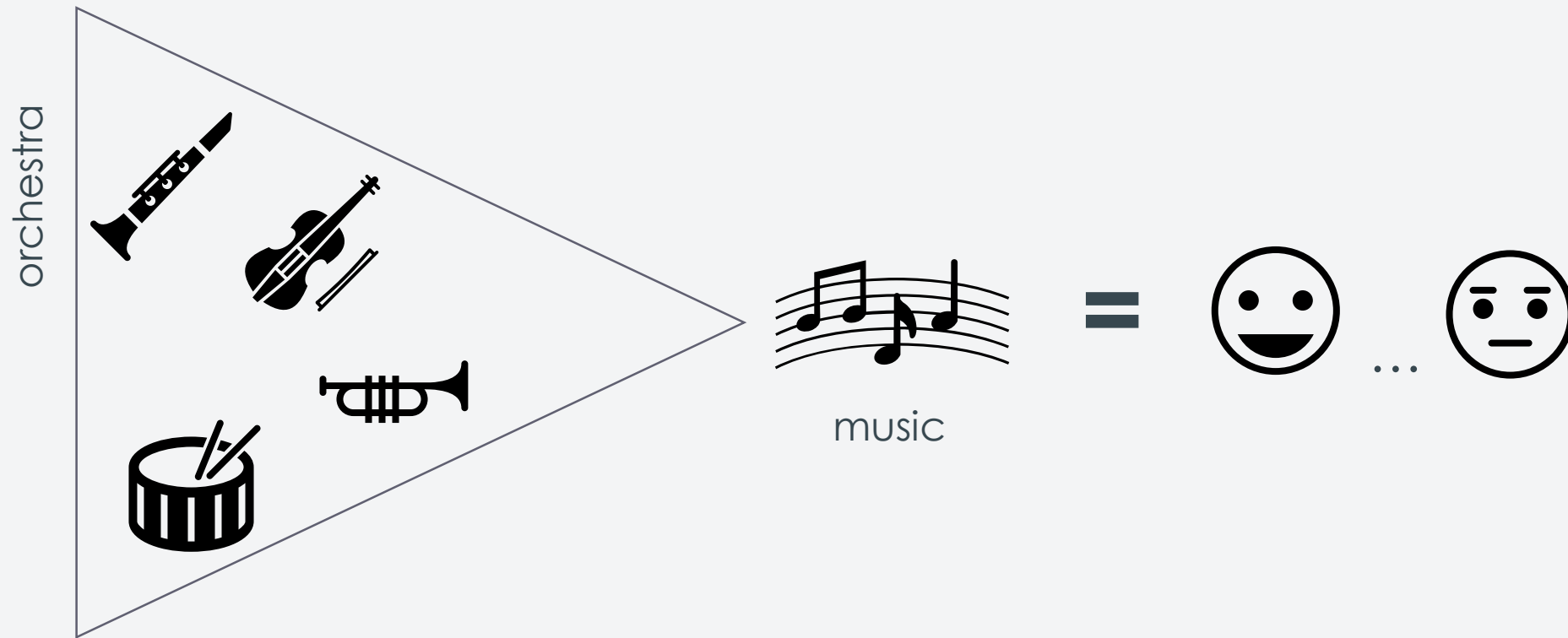


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JD Edwards
Community

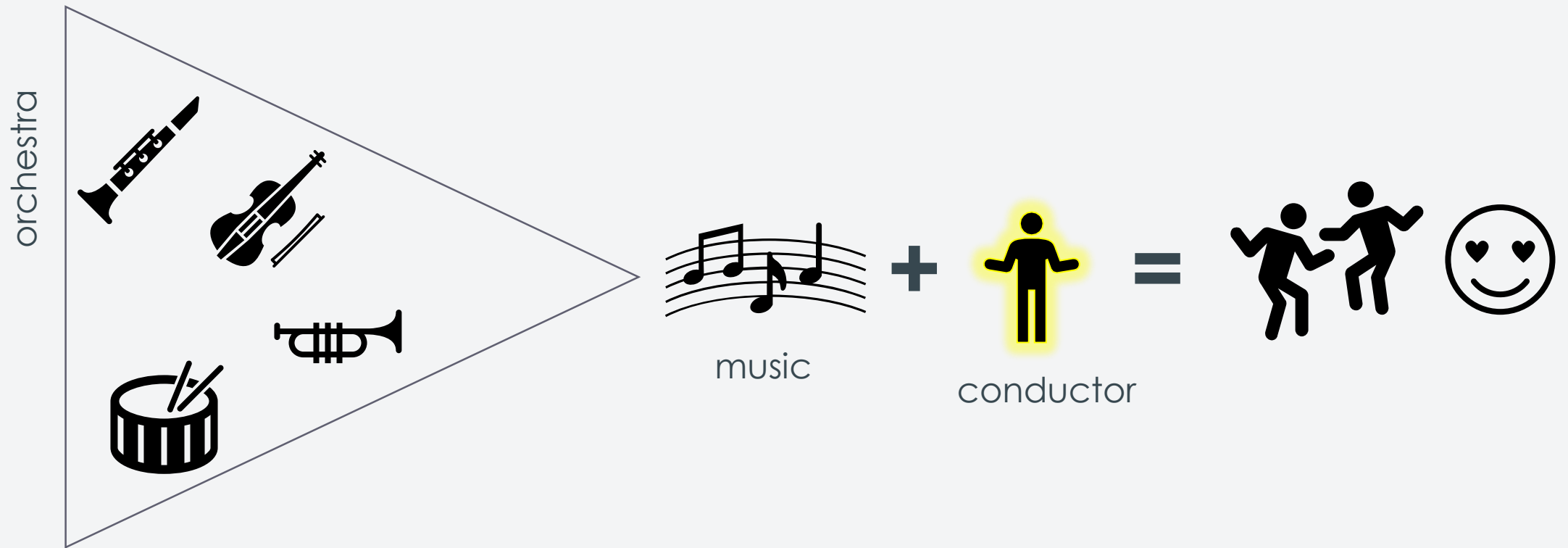
An Analogy : Conductor in Music



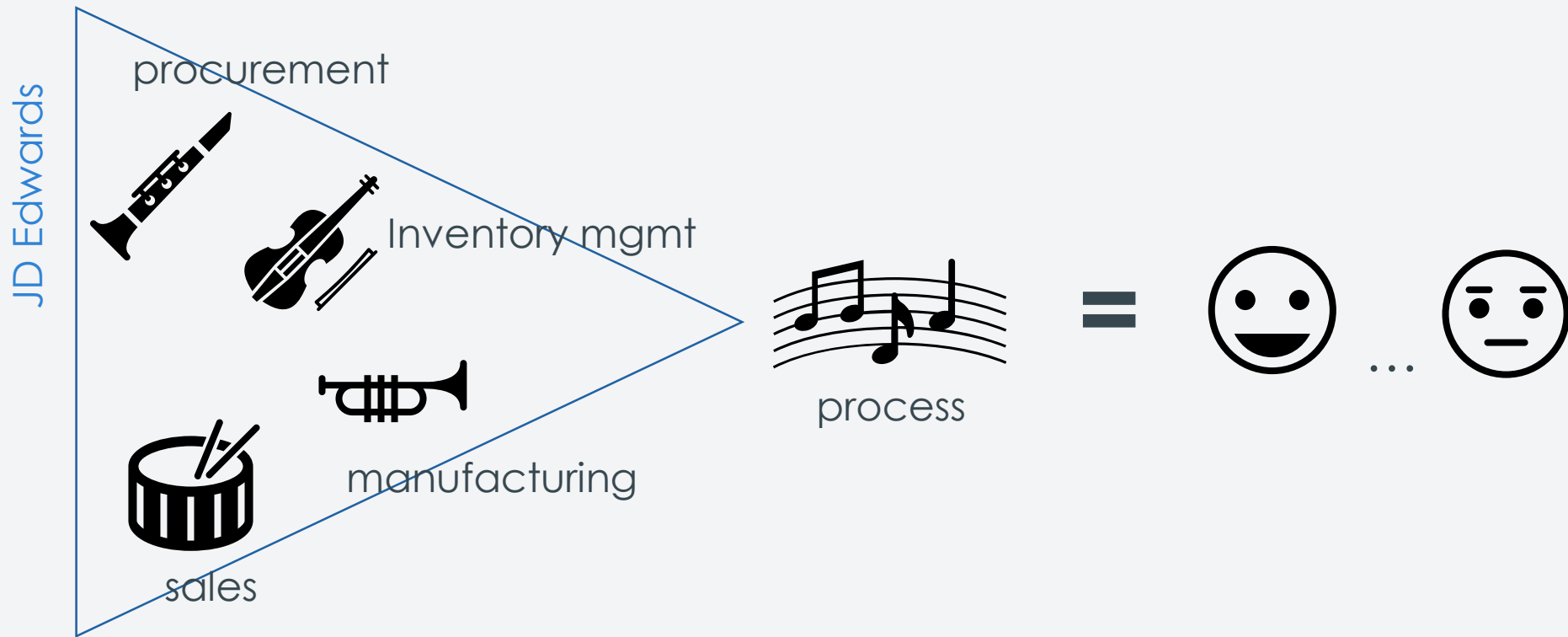
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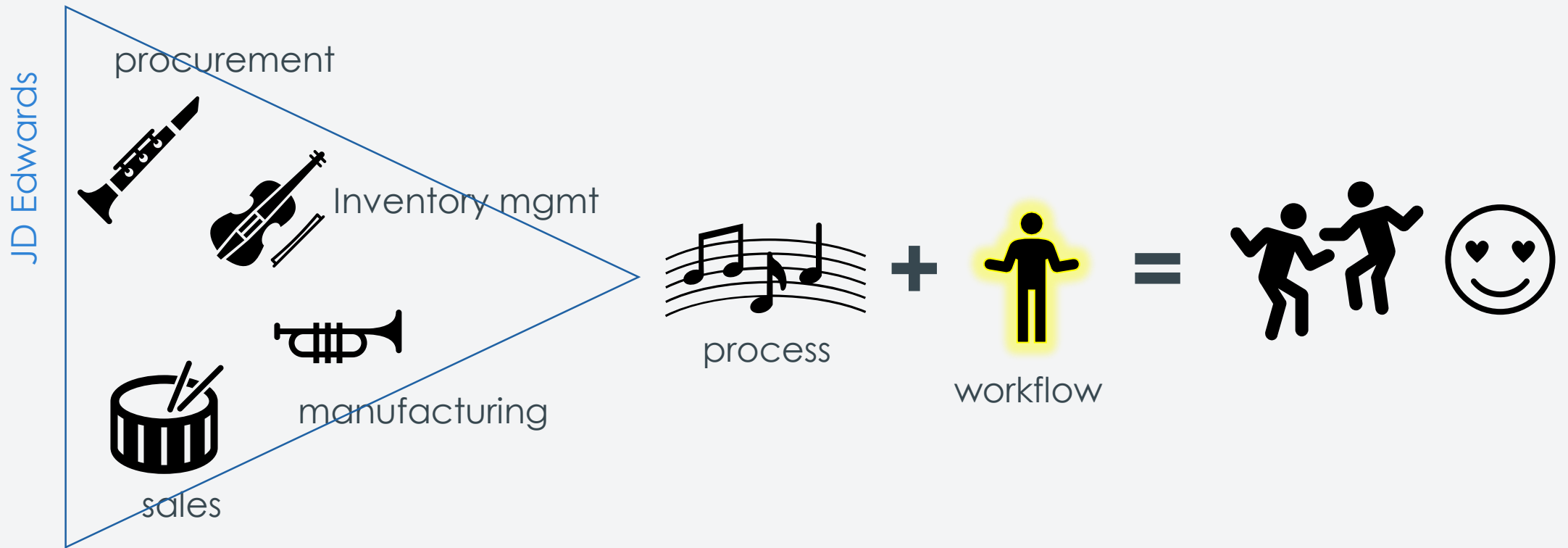
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