Using EnterpriseOne Pages to Build Process Models and Metrics

Before You Begin

Enterprise Automation is the next evolutionary step after process automation. The tools, techniques, and disciplines of Enterprise Automation allow us to ingest the data that we have been collecting for years in our JD Edwards systems, visualize that data as process models and metrics about how our enterprise is running, and analyze that data toward the aim of improvement. At its core, Enterprise Automation uses process models and metrics to help us see a data-driven picture of our business. We can use existing resources, such as EnterpriseOne pages, One View Watchlists, One View reports, and UX One analytics to accomplish this.

In this Oracle by Example tutorial you will use these EnterpriseOne features to build a process model and metrics:

- EnterpriseOne pages, specifically, a composed page with a designer pane
- One View Watchlists
- UX One role-based pages, specifically, the Procurement Manager Item Cost page

Note: For this workshop it is recommended to use the Firefox browser.

Scenario

In this 60-minute tutorial, let's consider a scenario in which you want to visualize the business process for managing suppliers. The process consists of these steps:

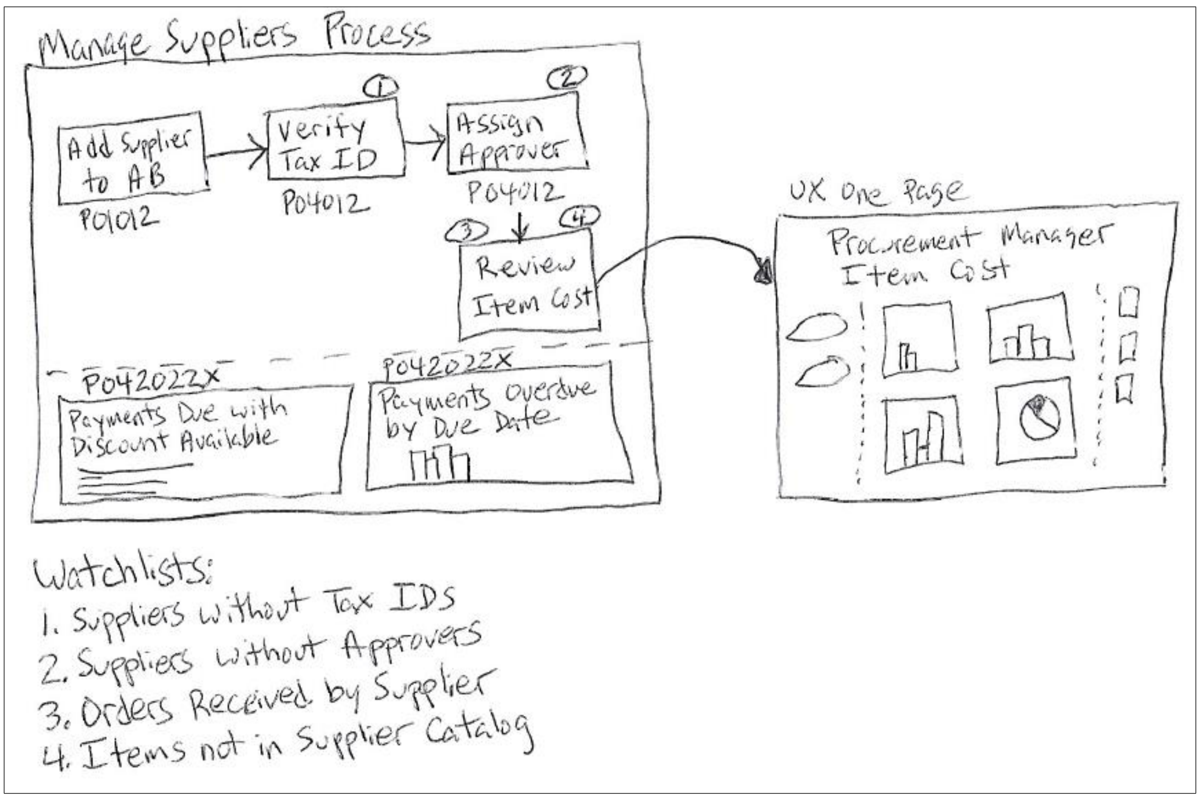
1. Add suppliers to Address Book
2. Verify or add a tax ID for each supplier
3. Assign an approver for supplier vouchers

There are also relevant metrics and analytics you would like to see in the context of this process.

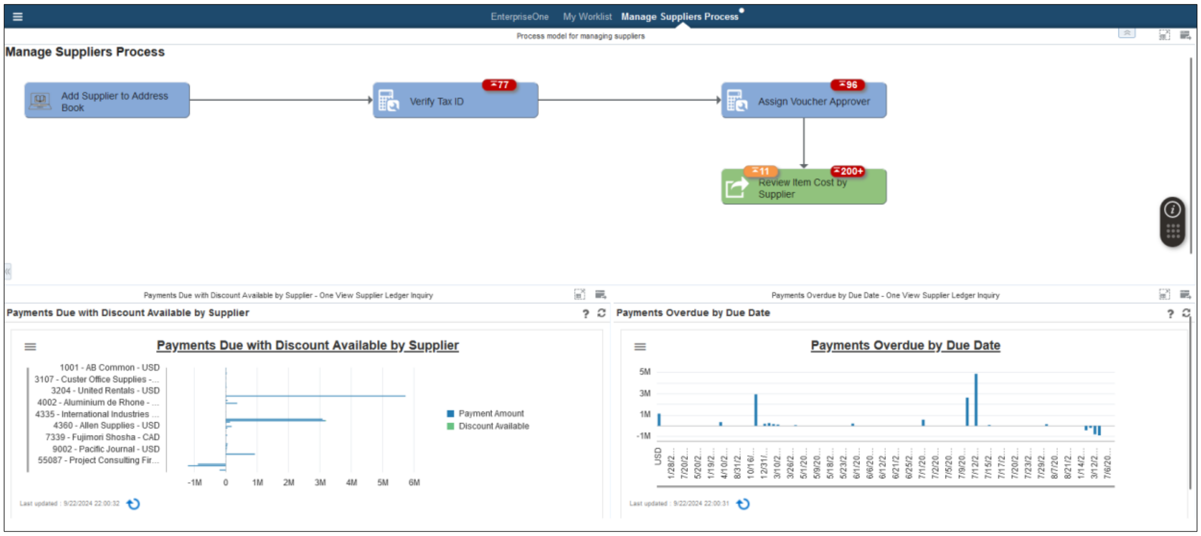
For this scenario you will:

- Grant yourself access to the PROCMGRJDE role, which offers many existing components
- Create an EnterpriseOne composite page to represent a process model
- Create One View Watchlists and add them to the process model
- Add existing supplier analytics to the page
- Create a link from that page to the existing Procurement Manager Item Cost UX One page

When you create a process model and metrics using EnterpriseOne pages, it is necessary to begin with a map of the steps of the process model, the relevant metrics to show on the model, and a map of any interrelated pages or subprocesses. This map can be as simple as a hand-sketched diagram such as this:



When you are finished your process model will look like this:



What Do You Need?

To perform the steps in this tutorial, you will need:

- Access to a JD Edwards EnterpriseOne environment with Release 24 (Tools Release 9.2.8.2) or later. JD Edwards EnterpriseOne Trial Edition running on Oracle Cloud Infrastructure is suitable, but you can use any environment with the proper Tools release.
- Security access to the PROCMGRJDE role or the ability to grant yourself access to that role.
- This OBE uses demo data that is preconfigured in JD Edwards EnterpriseOne Trial Edition, including user-defined objects for UX One components. You can accomplish the steps in this OBE using similar data in your own environment.

1. Granting Access to the PROCMGRJDE Role

Strictly speaking, this step is not necessary for building process models. However, if you are using JD Edwards EnterpriseOne Trial Edition, this role will provide access to a number of reusable components that will make the steps in this OBE easier.

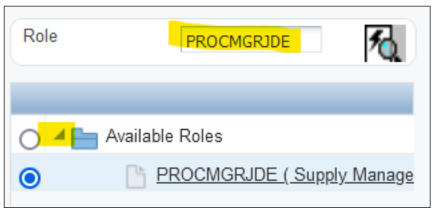
1. Sign into the EnterpriseOne web client. If you are using JD Edwards EnterpriseOne Trial Edition, sign in using the JDE user ID.

2. Navigate to the Role Relationships application. You can Fast Path to P95921 or click:

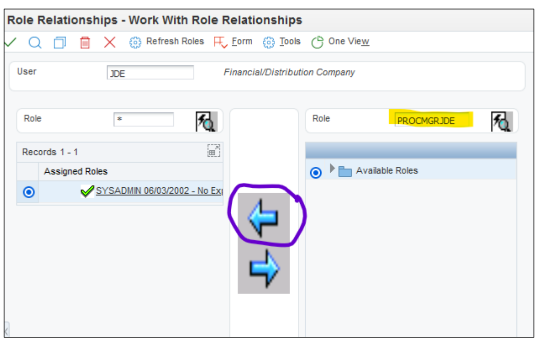
   EnterpriseOne Lifecycle Tools > **System Administration Tools** > **User Management** > **Role Relationships**

3. On Work With Role Relationships, in the **User** field, enter your user ID (for example `JDE`) and click **Find**.

4. After the existing roles for your user ID appear under Assigned Roles, in the **Role** field on the right column, enter `PROCMGRJDE` and click the **Find Role** visual assist.

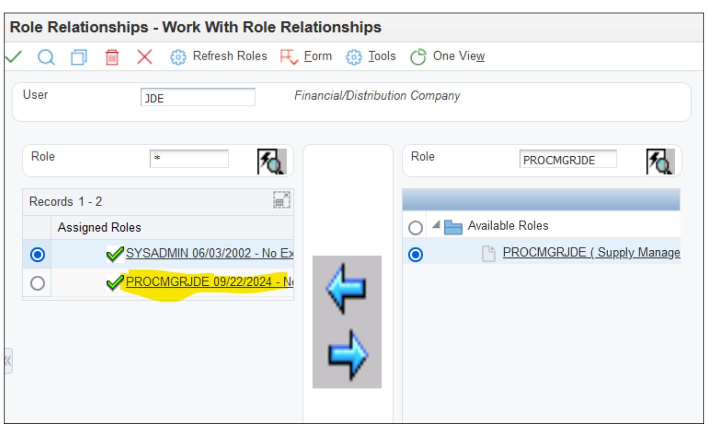


5. Choose the PROCMGRJDE role; then click the **left arrow**.



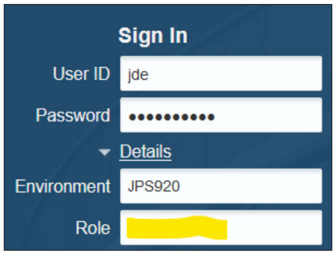
6. On Role Revisions, click OK to confirm the assignment of that role.

   Verify that PROCMGRJDE has been added to the Assigned Roles list:

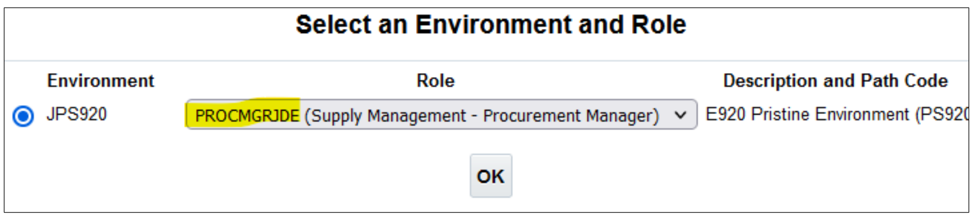


7. Click **Close**.

8. Sign out of the EnterpriseOne web client and sign back in. On the Sign In page, blank out the Role field and click **Sign In**.



9. On the **Select an Environment and Role** page, choose the **PROCMGRJDE** role from the Role dropdown and click **OK**.

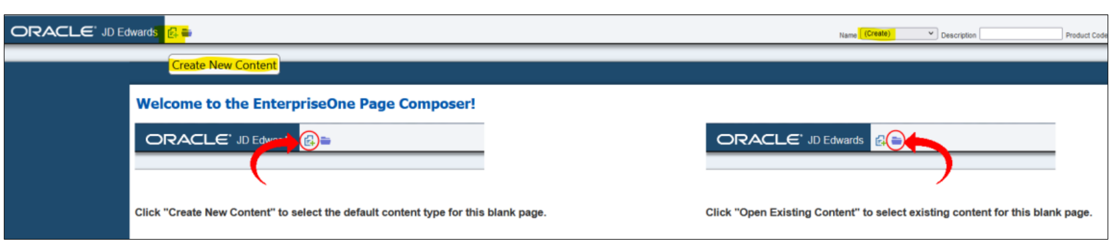


2. Creating a Process Model as an EnterpriseOne Page

In this exercise you will create a new EnterpriseOne composite page and add tiles and arrows to represent steps in the process model.

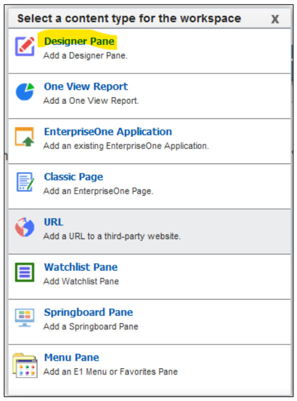
1. From the EnterpriseOne home page, open the drop-down menu under your user ID, then click **Manage Content** > **Composed Pages**.

2. On the Welcome to the EnterpriseOne Page Composer page, verify that in the **Name** dropdown list, **Create** is chosen.



3. Click **Create New Content**.

4. From **Select a content type for the workspace**, choose **Designer Pane**.



5. On the **Create Link to Designer Pane** page, complete the following fields:

   - **Name:** `Manage Suppliers`
   - **Description:** `Process model for managing suppliers`

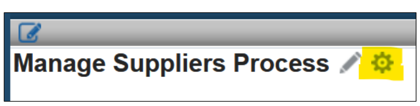
   You can keep the **Initial Total Columns** and **Initial Total Rows** at their default values of 5.

6. Click **OK**.

   A blank designer pane appears with a grid of 5 columns and 5 rows. You will use this grid to create tiles and arrows depicting your process model.

7. Click the pencil icon to edit the **Default Page Title**. Change it to `Manage Suppliers Process`.

8. Click the gear icon to configure the page.



9. On **Configure Page**, under the **Style** dropdown, choose **Small Icons**.

10. Click **OK**.

11. Hover over the top left cell, and click the **+** icon.

12. On **Configure Tile**, click the **Tile Type** drop-down and choose **Application**.

13. In the **Application ID** field, type `P01012`, and tab out of the field.

    Many of the fields load with default values. You can leave these as they are.

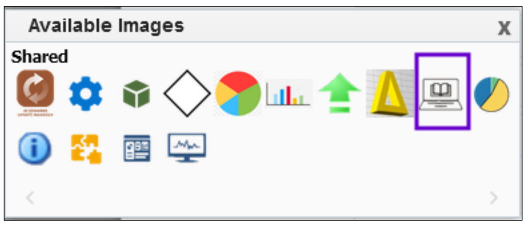
14. Complete the following fields:

    - **Title:** `Add Supplier to Address Book.`
    - **Description:** `Create an Address Book record for a new supplier`

15. Turn off the **Auto Image** switch.

16. Next to the **Custom Image** field, click the **Image Visual Assist**.

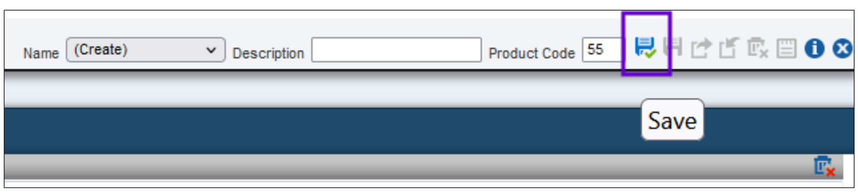
17. On the **Available Images** pop-up, choose the **LearnJDE.png** image.



18. Click **OK**.

    You have now configured your first step in the Manage Suppliers process model.

19. On the Designer pane click **Save**.



20. On the **Enter New Name** pop-up type `Manage Suppliers Process` and click **OK**.

    In the next steps you will proceed to add two more tiles to your process model.

21. Hover over the third (middle) cell in the top row of the grid and click the **+** icon.

22. Complete the following fields:

    - **Tile Type:** Application
    - **Application ID:** `P04012`
    - **Form ID:** `W04012D`
    - **Associate Watchlists:** Turn **On**
    - **Title:** `Verify Tax ID`
    - **Description:** `Verify supplier's tax ID`

23. Click **OK.**

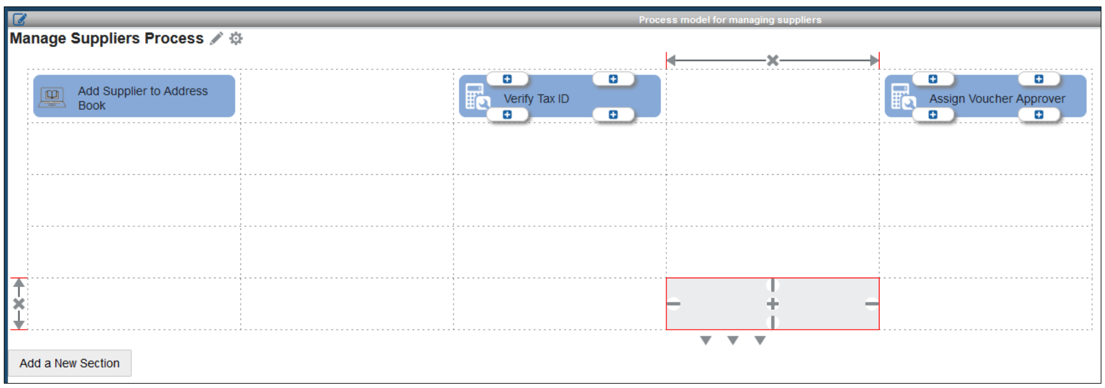
24. Hover over the fifth (last) cell in the top row and click the **+** icon.

25. Complete the following fields:

    - **Tile Type:** Application
    - **Application ID:** `P04012`
    - **Form ID:** `W04012D`
    - **Associate Watchlists:** Turn **On**
    - **Title:** `Assign Voucher Approver`
    - **Description:** `Assign an approver for vouchers`

26. Click **OK.**

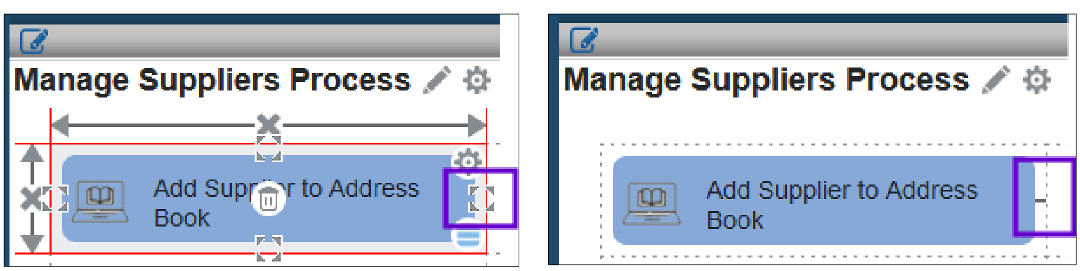
    At this point your process model should look like this:



27. Click **Save**.

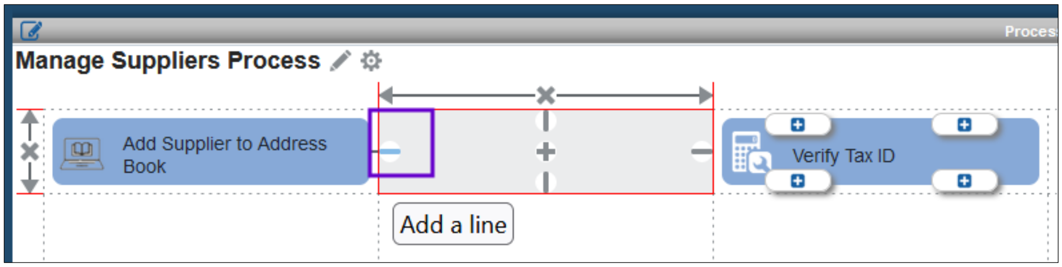
    Next, to make this page look more like a process model you will add arrows connecting the tiles.

28. Hover over the first tile and hover over the space between the tile and the dotted line border on the right side until **Toggle this line** appears; then click to draw a line.



A line is drawn between the tile and its right border.

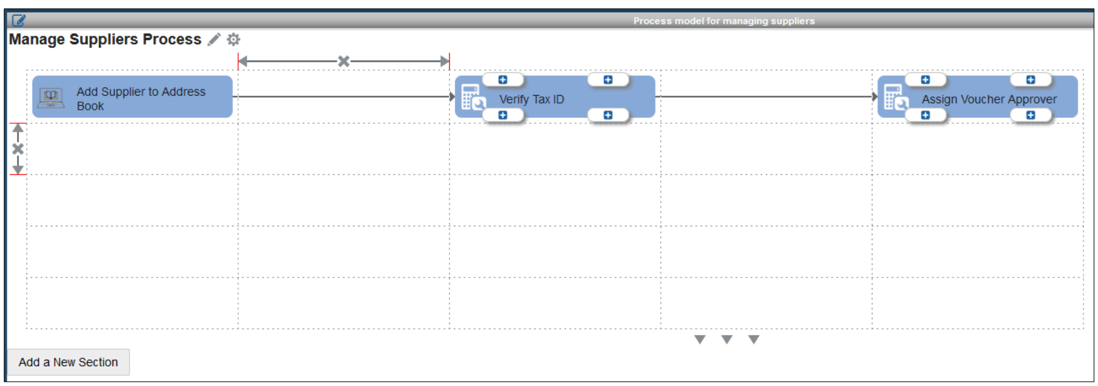
29. Similarly, hover over the second (blank) cell and click to add a line on its left side:



30. Repeat these steps to add lines to the right side of the second cell.

31. To add an arrowhead going into the Verify Tax ID step, add a line, but click twice.

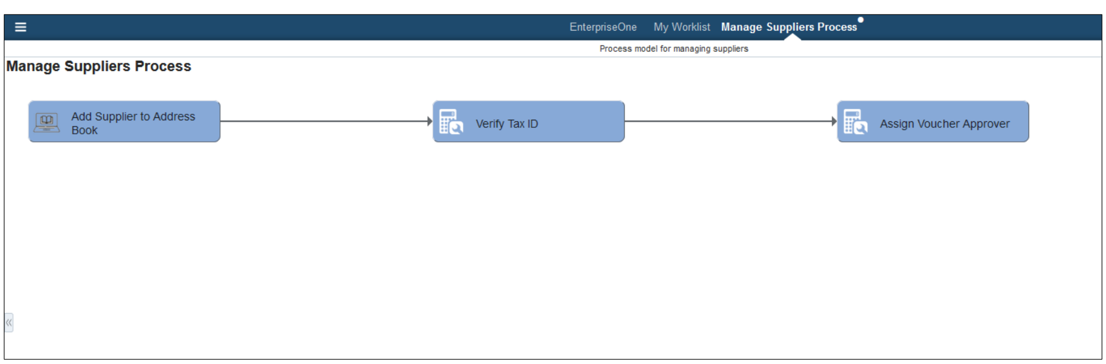
32. Repeat these steps to add lines and arrows from Verify Tax ID to Assign Voucher Approver. Your process model should look like this:



33. Click **Save** to save your EnterpriseOne page.

34. Click **Close** to close the page design window.

Your new process model should look like this rendered as an EnterpriseOne page:



3. Adding Watchlists as Metrics to Tiles

Enterprise Automation is not only about visualizing your business processes as process models, but it is also about visualizing key metrics within the context of those processes. One View Watchlists are an easy and effective way of visualizing metrics. In this exercise you will create two Watchlists and attach them to steps in your process model.

Note: There may be licensing implications if you create custom Watchlists for use in your production systems. Refer to *JD Edwards UX One Frequently Asked Questions*.

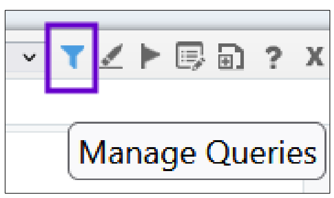
Creating a Watchlist for Suppliers without Tax IDs

1. Begin in the EnterpriseOne web client on your **Manage Suppliers Process** page.

2. Click the **Verify Tax ID** tile to launch the Work With Supplier Master form.

   In the following steps you will create a Watchlist to count the number of Supplier records for which the Tax ID field is empty.

3. On Work With Supplier Master, click the Manage Queries (funnel) icon

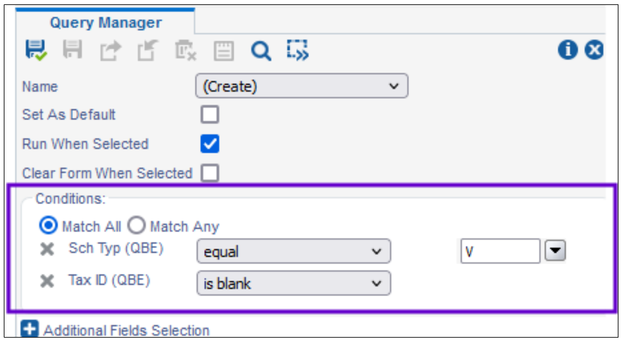
4. With the Query Manager form open, click the **+** icon next to **Sch Typ** in the grid to add Sch Typ (QBE) to the list of query criteria.

5. In the input box to the right, type V.

6. Next, click the **+** icon next to **Tax ID** in the grid to add Tax ID (QBE) to the list of query criteria.

7. Click the drop-down box next to Tax ID and change the operator from **equal** to **is blank**.

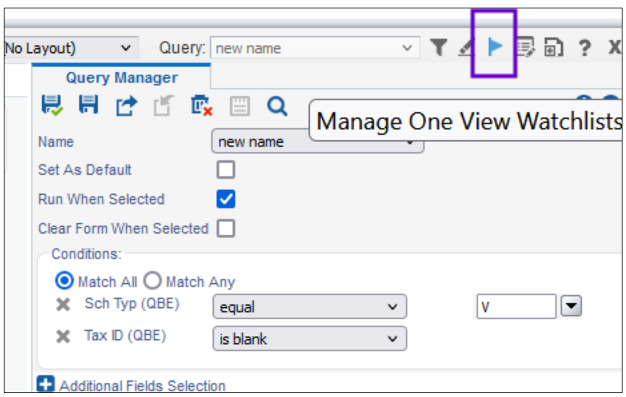
   Your Query Conditions should look like this:



8. Click **Save**.

9. In the **Enter New Name** pop-up box type `Suppliers without Tax IDs` and click **OK**.

10. On the menu bar, click the **Manage One View Watchlists** (flag) icon.



11. Verify that in the **Query to be Used** field your **Suppliers without Tax IDs** query is shown.

12. In the **Critical Threshold** field enter `1`.

    Your Watchlist will turn red if there are one or more Supplier records without Tax IDs.

13. Click **Save** to turn your query into a Watchlist.

14. On the **Enter New Name** pop-up you can accept the default Watchlist name, which is the same as the query name, and click **OK**.

15. Click **X** to close the side panel.

16. Click **X** to close Work With Supplier Master.

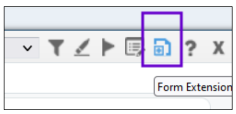
You now have a Watchlist to count the number of Supplier records that do not have a Tax ID. Next you will use the same process to create a Watchlist for supplier records that do not have a voucher approver assigned, but first you'll need to create a form extension to add a data item to the grid.

Creating a Form Extension to Add a Data Item to the Grid

1. Begin on your **Manage Suppliers Process** page.

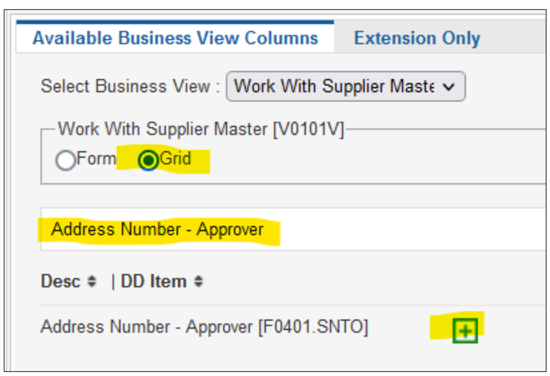
2. Click the **Assign Voucher Approver** tile to launch the Work With Supplier Master form.

3. On Work With Supplier Master, click the Form Extension icon.



4. In the **Form Extension Manager** pane, under the **Available Business View Columns** tab, choose the **Grid** option.

5. In the **Column Search** box search for `Address Number – Approver`.



6. Click the **Add Column to Grid** (+) icon to add that data item to the grid.

7. Click **Save** to save the form extension.

8. Click **X** to close the Form Extension Manager panel.

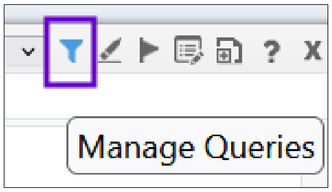
Creating a Watchlist for Suppliers without Approvers

Now that you have added the Address Number – Approver field to the grid, you can create a Watchlist to count the number of supplier records for which this field is blank.

1. Begin on your **Manage Suppliers Process** page.

2. Click the **Assign Voucher Approver** tile to launch the Work With Supplier Master form.

3. On Work With Supplier Master, click the Manage Queries (funnel) icon



4. With the Query Manager form open, click the **+** icon next to **Sch Typ** in the grid to add Sch Typ (QBE) to the list of query criteria.

5. In the input box to the right, type `V`.

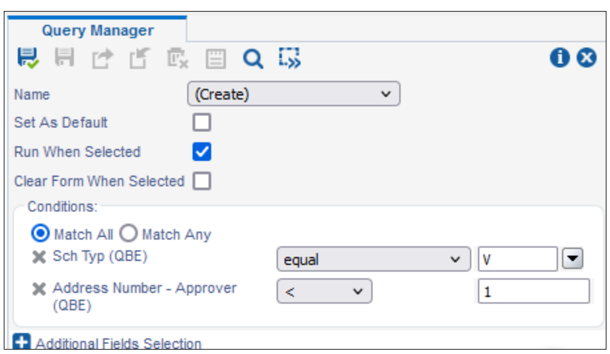
6. Next, click the **+** icon next to **Address Number - Approver** in the grid to add Address Number - Approver (QBE) to the list of query criteria.

7. Click the drop-down box next to **Address Number – Approver (QBE)** and change the operator from **equal** to **<** (less than).

8. In the input box to the right enter `1`.

   Note: Finding Address Book fields with a value "less than 1" is a technique to find empty fields.

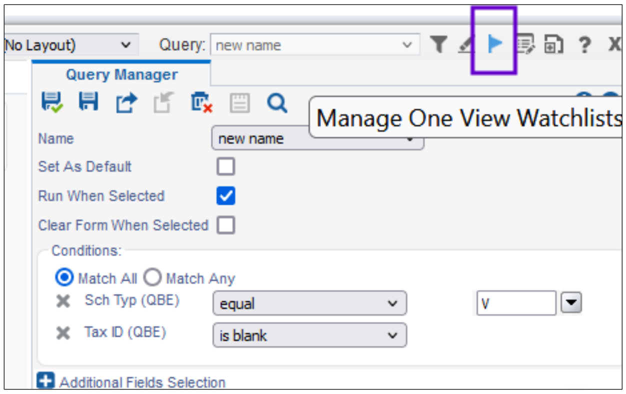
   Your Query Conditions should look like this:



9. Click **Save**.

10. In the **Enter New Name** pop-up box type `Suppliers without Approvers` and click **OK**.

11. On the menu bar, click the **Manage One View Watchlists** (flag) icon.



12. Verify that in the **Query to be Used** field your **Suppliers without Approvers** query is shown.

13. In the **Critical Threshold** field enter `1`.

    Your Watchlist will turn red if there are one or more Supplier records without approvers.

14. Click **Save** to turn your query into a Watchlist.

15. On the **Enter New Name** pop-up you can accept the default Watchlist name, which is the same as the query name, and click **OK**.

16. Click **X** to close the side panel.

17. Click **X** to close Work With Supplier Master.

Associating Watchlists with Tiles

Now that you have created Watchlists you can associate them with tiles on your process model. In this way you can visualize these metrics within the context of your process.

1. Begin in the EnterpriseOne web client on your **Manage Suppliers Process** page.

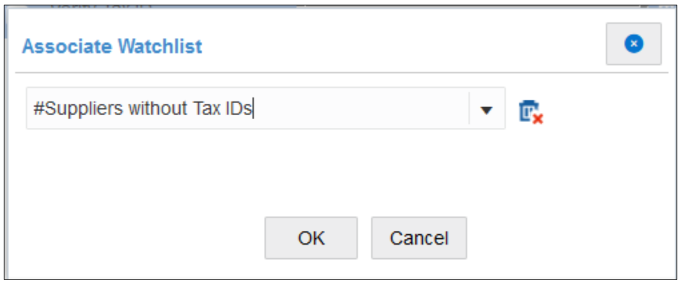
2. Open the drop-down menu under your user ID, then click **Manage Content** > **Composed Pages**.

   Notice that the tiles for the Verify Tax ID and Assign Voucher Approver steps have four **+** icons on their edges. These are the four places in which you can configure Watchlists to appear. These appear because you turned the Associate Watchlists switch on when you configured the tiles.

3. On the **Verify Tax ID** tile, click the **+** icon on the top right of the tile.

4. On the **Associate Watchlist** pop-up, from the drop-down menu choose the #**Suppliers without Tax IDs** Watchlist and click **OK**.

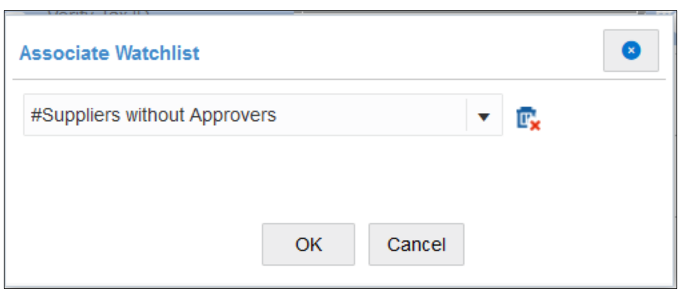
   Note: The # symbol preceding the Watchlist indicates that this is a personal (i.e., not shared) Watchlist. Using the User-defined Object security framework you can (and should) publish and share Watchlists that you intend for others to use.



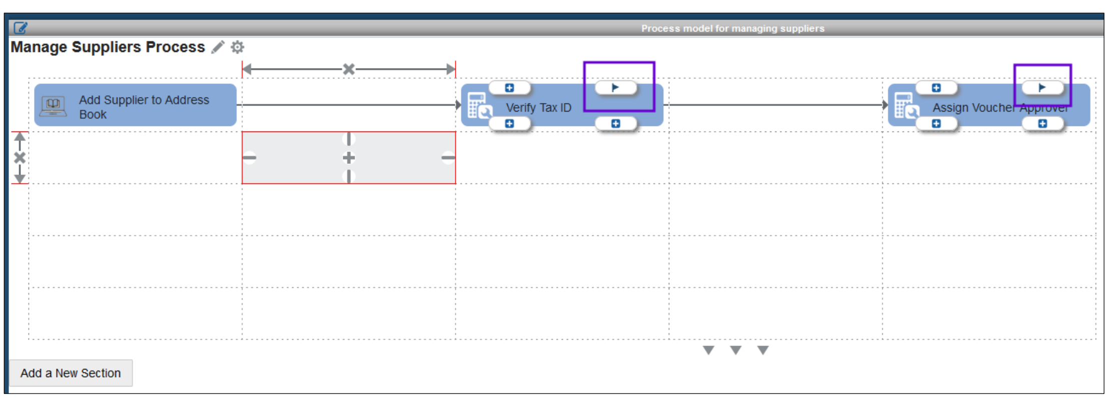
   Notice that on the tile the **+** icon changes to a flag icon to indicate that this position has a Watchlist associated.

5. On the **Assign Voucher Approver** tile, click the **+** icon on the top right of the tile.

6. On the **Associate Watchlist** pop-up, from the drop-down menu choose the #**Suppliers without Approvers** Watchlist and click **OK**.



   Your page should look like this:



7. Click **Save** to save your EnterpriseOne page.

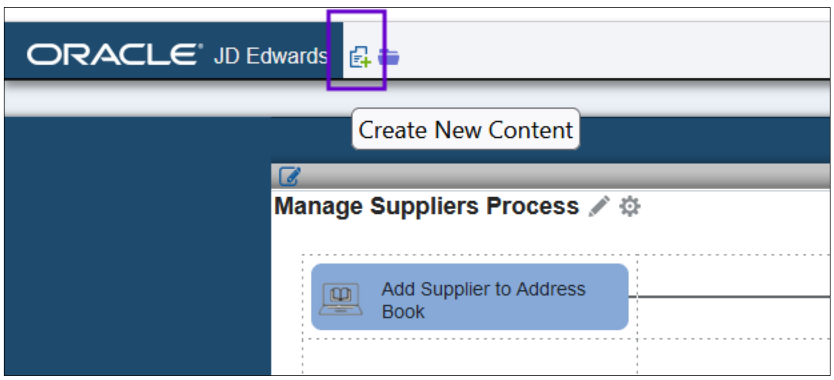
4. Adding Analytics to the Process Model

EnterpriseOne delivers analytic charts as part of many application modules. These charts are very useful in the context of Enterprise Automation, especially when they are presented in the context of process models. In this exercise you will add two such analytic applications to your process model.

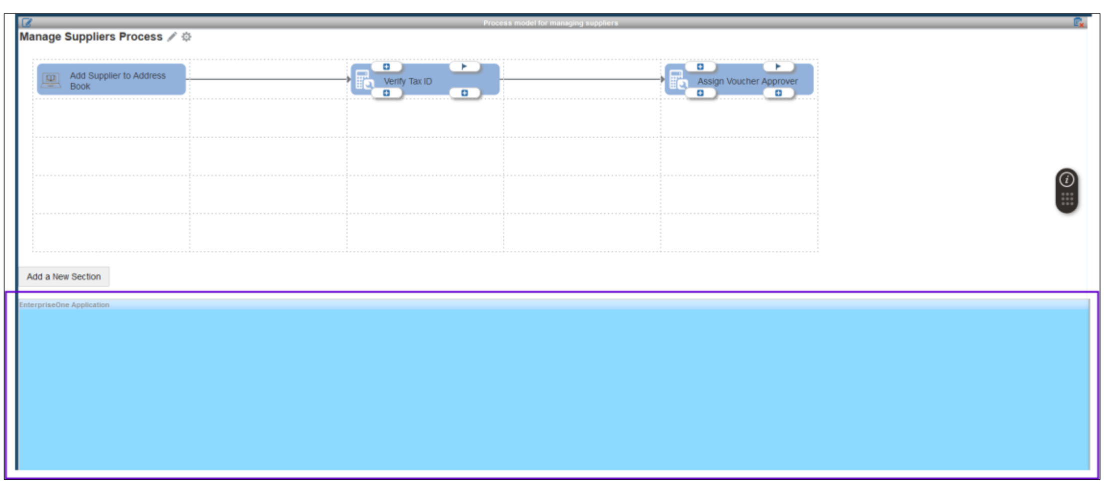
1. Begin in the EnterpriseOne web client on your **Manage Suppliers Process** page.

2. If you are not already in edit mode, from the drop-down menu under your user ID click **Manage Content** > **Composed Pages**.

3. Click the **Create New Content** icon.



4. From the **Drag and drop to workspace to create** pop-up, click on EnterpriseOne Application, and drag it to the bottom of your page below the **Add a New Section** button. A blue shadow box will show you where your application will be positioned. Hold the mouse button until the blue box fills the bottom of the page like this, then release it:



5. On the Create Link to EnterpriseOne Application pop-up, complete the following fields:

   - **Application:** `P042022X`
   - **Form:** `Payments Due with Discounts by Supplier (W042022XF)` (select this form from the drop-down menu)

   You can accept the defaults for all other fields.

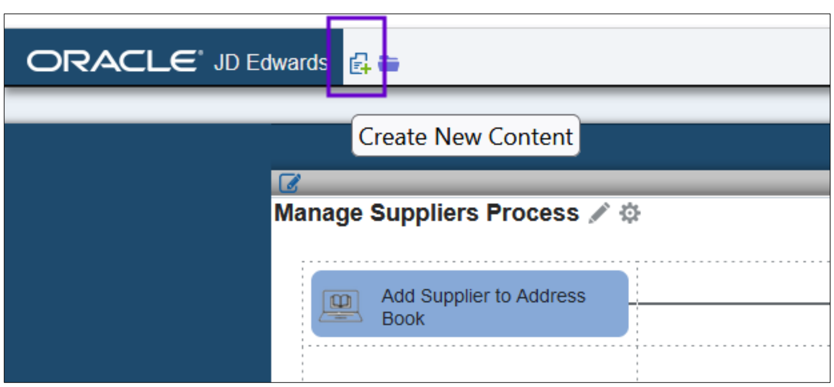
   Note: P042022X is an analytic application delivered as part of UX One. There are many such reusable components, and you can build your own.

6. Click **OK**.

   The analytic chart renders at the bottom of your page:

   Similarly, add another analytic chart next to this one:

7. Click the **Create New Content** icon.



8. From the **Drag and drop to workspace to create** pop-up, click on EnterpriseOne Application, and drag it to the bottom of your page and next to the previous chart. A blue shadow box will show you where your application will be positioned. Hold the mouse button until the blue box fills the bottom right of the page like this, then release:

9. On the Create Link to EnterpriseOne Application pop-up, complete the following fields:

   - **Application:** `P042022X`
   - **Form:** `Payments Overdue by Due Date(W042022XE)` (select this form from the drop-down menu)

   You can accept the defaults for all other fields.

10. Click **OK**.

    The analytic chart renders at the bottom of your page:

11. Click **Save** to save your EnterpriseOne page.

5. Adding a Link to Another EnterpriseOne Page

Sometimes process models can become so complex that they will not fit on a single page. Other times you might want to link from a process model to related EnterpriseOne pages, such as UX One role-based pages. In this lesson you will add a tile that links to another preexisting page.

1. Begin in the EnterpriseOne web client on your **Manage Suppliers Process** page.
2. If you are not already in edit mode, from the drop-down menu under your user ID click **Manage Content** > **Composed Pages**.
3. On the page grid, hover over the last (rightmost) cell on the third row, and click the **+** icon.
4. On **Configure Tile**, click the **Tile Type** drop-down and choose **Page**.
5. From the **Page** drop-down menu, choose **Procurement Manager Item Cost**.
6. Complete the following fields:

    - **Associate Watchlists:** Turn **On**
    - **Color:** `green`
    - **Title:** `Review Item Cost by Supplier`
    - **Description:** `Go to the Procurement Manager Item Cost page`

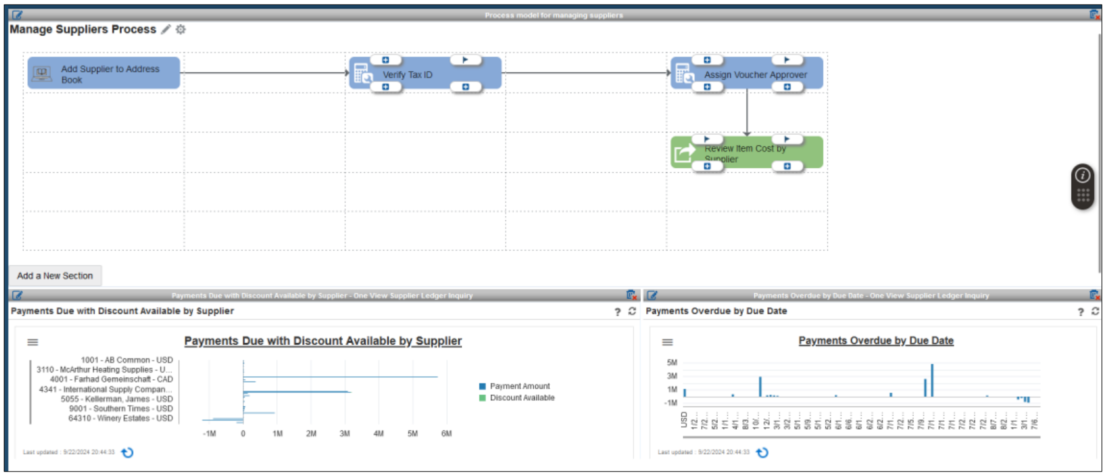
    You can accept the defaults for all other fields.

7. Click **OK**.
8. Use the technique you learned in the prior exercise to draw lines and arrows connecting the **Assign Voucher Approver** tile to the **Review Item Cost by Supplier** tile.
9. Use the technique you learned in the prior exercise to click the **+** icons and add the following two Watchlists to the top of the tile:

    - Orders Received by Supplier
    - Items Not in Supplier Catalog

    Hint: You can type to search for Watchlists in the Associate Watchlist pop-up menu.

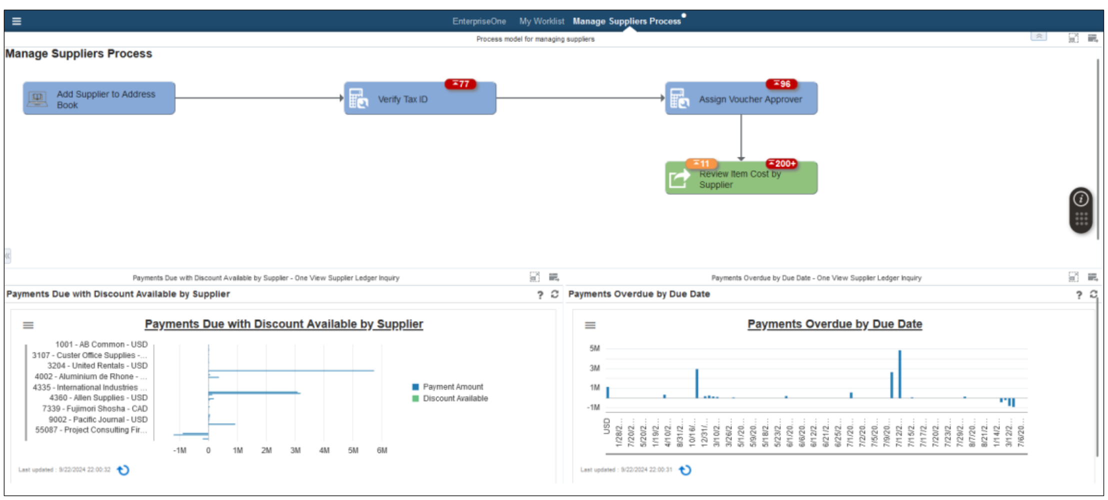
Your completed page should now look like this in page edit mode:



10. Click **Save** to save your EnterpriseOne page.

11. Click **Close** to close the page design window.

Your new process model should look like this rendered as an EnterpriseOne page:



Now that your process model is complete you can experiment by interacting with it.

6. Interacting with the Process Model

As stated at the beginning of this OBE, Enterprise Automation uses process models and metrics to help us see a data-driven picture of our business. You have created a new EnterpriseOne page, new Watchlists, and you have reused existing resources to accomplish this. Now perform the following actions to see how your page integrates the model with metrics about the process.

1. Click the tiles to launch directly into the associated EnterpriseOne applications. Close the applications to return to the process model page.

2. Notice how the Watchlists show metrics in context of the process model. Hover over the Watchlist badge to see more information. Click the Watchlist badge to launch directly into the associated application with the query automatically filtering the data in the grid. Close the application to return to the process model page.

3. Click the Review Item Cost by Supplier step and see how it launches to the associated EnterpriseOne page. Click the Back (back arrow) icon to return to the previous page.

Conclusion

In this Oracle-by-Example (OBE) workshop, you learned how to:

- Create an EnterpriseOne composite page with a designer pane with tiles and arrows to depict a process model
- Create One View Watchlists and associate them with tiles on the page
- Add EnterpriseOne analytic applications to the page
- Add a tile that links to another EnterpriseOne page

Using these basic skills you can now create EnterpriseOne pages to depict your simple or complex process models and associate relevant metrics and analytics to those models. These models and metrics will reveal a data-driven picture of how your enterprise is operating and help you discover opportunities for growth and improvement.