JD Edwards EnterpriseOne Tools

Enterprise Process Modeler Guide

1.0

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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

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Related Information

For additional information about JD Edwards EnterpriseOne applications, features, content, and training, visit the JD Edwards EnterpriseOne pages on the JD Edwards Resource Library located at:

http://learnjde.com

Conventions

The following text conventions are used in this document:

Convention	Meaning
Bold	Boldface type indicates graphical user interface elements associated with an action or terms defined in text or the glossary.
Italics	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`Monospace`	Monospace type indicates commands within a paragraph, URLs, code examples, text that appears on a screen, or text that you enter.
> Oracle by Example	Indicates a link to an Oracle by Example (OBE). OBEs provide hands-on, step- by-step instructions, including screen captures that guide you through a process using your own environment. Access to OBEs requires a valid Oracle account.

1 Introduction to Enterprise Process Modeler

Welcome

Welcome to the *JD Edwards EnterpriseOne Tools Enterprise Process Modeler Guide*.

The main chapters in this guide contain instructions on how to:

- Create an enterprise process using the Enterprise Modeler in the design mode. The design mode enables you to configure the enterprise processes to point to the target of data, automatically generate a process model based on the ingested data, configure the source of data, and save the configurations as a UDO (User Defined Object).
- View and analyze the enterprise processes in the Enterprise Modeler in the runtime mode. The runtime mode enables you to choose from a set of preconfigured enterprise processes, visualize a graphic of the process model, visualize key performance indicators (KPIs), and metrics and measurements that apply to nodes and connections within the process model, and other functions.

This guide has been updated for JD Edwards EnterpriseOne Tools Release 9.2.9.

Audience

This guide is intended for business analysts or project managers responsible for planning, executing, defining business requirements, and looking to optimize their processes and increase efficiency.

Enterprise Process Modeler Overview

The Enterprise Process Modeler provides a graphical tool for designing processes, defining metrics for the processes, and visualizing a real-time view of how those processes are running. As a foundational piece of the Enterprise Automation framework, the Enterprise Process Modeler enables you to define, monitor, and measure the processes that are essential to your operations.

This is a low-code, no-code, web-based tool where you can select an existing process template, and define steps, transitions, and metrics.

The key capabilities of the Enterprise Process Modeler are:

- Design Time mode: You can use the existing process template, drag and drop the nodes to the required position, specify process definitions, define filters and other properties for links and nodes. The system also enables you to add, delete, or change the generated process.
- Save your enterprise process model as a UDO and view the shared enterprise processes.
- Runtime mode: You can visualize the enterprise process based on real-time data and engage with the nodes interactively.
- Snapshot mode: Allows you to capture and save a snapshot of the current runtime enterprise process data, enabling you to review it later.

Note: *Click here to view a quick tour of this feature.*

Note: *Click here to view a OBE of this feature.*

Note: *Click here to view a recording of this feature.*

Understanding Enterprise Process Modeler

The Oracle JD Edwards EnterpriseOne Process Modeler is built on the premise that the business data contained in Enterprise Resource Planning (ERP) databases represent immense value beyond a mere system of record for business transactions. While it is true that ERP systems are designed to capture, record, and report business transactions that reflect the day-to-day operations of an enterprise, for example, requisitions, purchase orders, sales orders, work orders, inventory movement, warehouse activity, and so on, as these transactions are processed and recorded over time, they amass a body of data that paints a picture of how the enterprise operates, as well as metrics, measurements, and KPIs that depict the “health” of the enterprise.

More specifically, consider the case of the life cycle of a sales order. As a sales order moves through its life cycle, it carries a set of data that is recorded in the ERP system. Status codes are updated for each transaction, from initial creation, through approvals, and eventually to delivery of goods and collection of revenues. Through each phase there might also be certain ledgering, logging, or auditing data generated in parallel to the movement of the transaction. As thousands and tens of thousands of transactions accumulate, they begin to paint a picture of business processes, prescribed or implied, as well as metrics about those processes. It is the function of the EnterpriseOne Process Modeler to ingest this data and provide graphic visualizations of the models and metrics that are occurring in an enterprise with the intent of providing you with tools to analyze the data and determine inefficiencies or areas of improvement.

Like most ERP systems, JD Edwards EnterpriseOne offers applications to create business documents, such as a purchase order. Those applications set status codes on a purchase order, either manually by you or automatically by the application logic, as the purchase order moves through its lifecycle. JD Edwards EnterpriseOne offers additional functionality called “order activity rules” that impose a stricter pathway from one status to the next. While the data exists in the database, there is no way for a human to graphically visualize the “beaten path” that purchase orders take as they are created, approved, rejected, reversed, revised, and eventually closed. The EnterpriseOne Process Modeler/Process Model Generator can ingest this data and automatically draw a graphical depiction of the process flow. Additionally, the Process Modeler can ingest other data to reveal metrics about the process, such as how long the approval process is, in average; how many purchase orders are rejected; which business units have the most rejections; and so forth. While many reporting and business analytics systems address the visualization of similar data, the Process Modeler does it in context and in concert with the business process flow. It is only in the context of the business process flow that you can analyze the data and determine what changes to the process will effect a desired favorable change to the resulting metrics or KPIs.

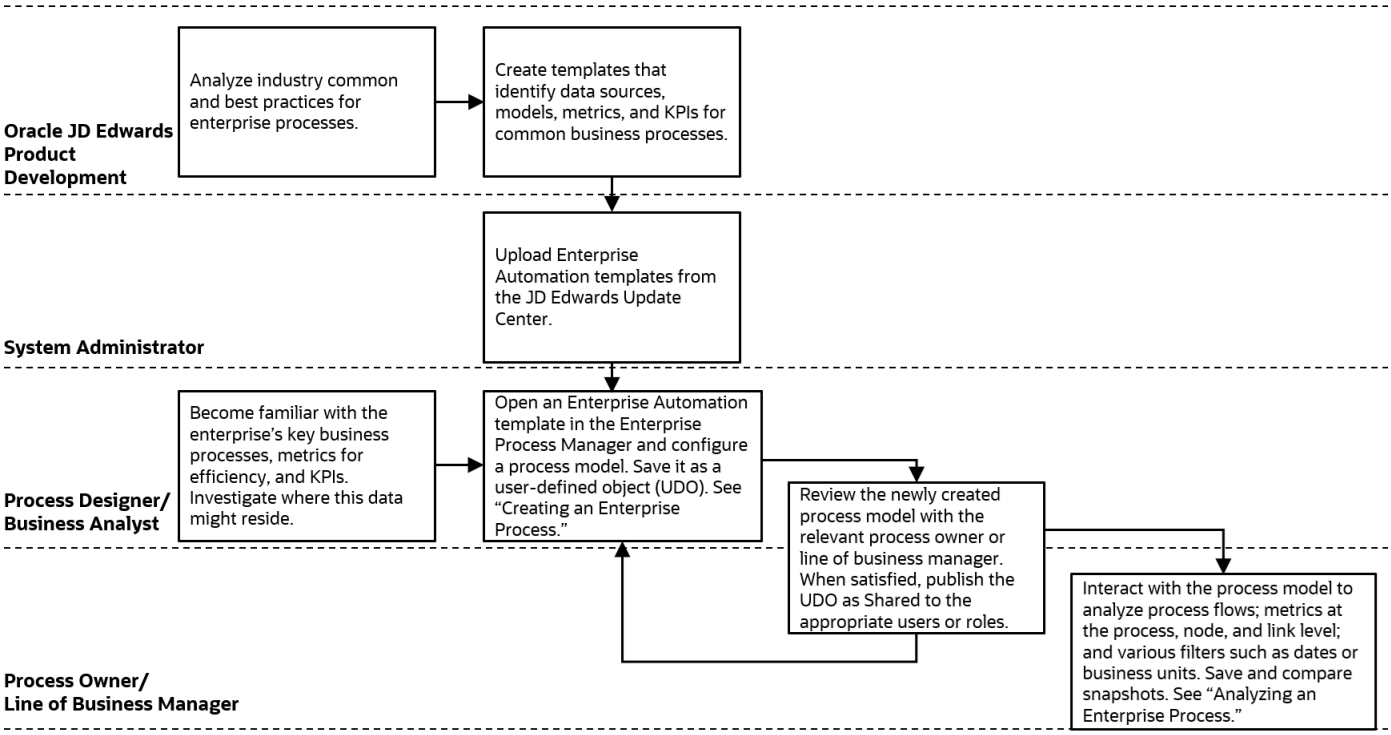
Benefits

Enterprise Process Modeler is a powerful tool for businesses looking to optimize their processes and increase efficiency. By using this tool to map and analyze the processes, you can identify areas for improvement and make changes that can lead to cost savings, increased productivity, and improved customer satisfaction. This could include identifying bottlenecks, redundancies, or other inefficiencies. Also, you can easily define the processes and data for better understanding and visibility.

Using Enterprise Process Modeler, you can:

- Quickly build visual models of enterprise processes
- Define micro and macro processes, and define metrics for those processes
- Capitalize on the process metadata that already exists within EnterpriseOne data
- Get a dynamic view of how business processes are running

Enterprise Process Modeler Flowchart



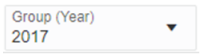
2 Understanding the Enterprise Process Modeler User Interface

Understanding Icons

This section lists the icons and tabs displayed on the Enterprise Process Manager (design time) and Enterprise Process (runtime) windows:

Image	Name	Type
	Show Display Options	Icon
	Show Analytics Options	Icon
	Open Process Definition	Icon
	Process Properties (available in design mode only)	Tab
	Process Metrics (available in design mode only)	Tab
	Nodes Metrics (available in design mode only)	Tab
	Links Metrics (available in design mode only)	Tab
	Show Filter Options	Icon
	Snap to Node	Icon
	Snap to Grid	Icon
	Hold down the Ctrl key when dragging and dropping a node to disable Snap to Grid and Snap to Node features temporarily.	Information Icon
	Zoom to Fit	Icon

Image	Name	Type
	Process Analytics	Tab
	Node Analytics	Tab
	Link Analytics	Tab
	Click to set the context to the process level	Icon
	Configure	Icon
	Maximize	Icon
	Minimize	Icon
	Node Properties (available in design mode only)	Icon
	Link Properties (available in design mode only)	Icon
	Design Option (available in design mode only)	Tab
	Data Filtering and Grouping Options (available in design mode only)	Tab
	<Template Name> (available in design mode only)	Tab
	Preview (available in design mode only)	Tab
	Save as Snapshot (available in runtime mode only)	Icon
	Save Snapshot (available in snapshot mode only)	Icon
	Delete Snapshot (available in snapshot mode only)	Icon
	Show Context Analysis (available when context analytics tabs are hidden)	Icon
	Timeline View	Indicator

Image	Name	Type
	Moving clock hand	Indicator
	Domain View	Indicator
	Metrics Selector	Icon
	Normal	Indicator
	Warning	Indicator
	Critical	Indicator
	Group Selector (available if any option other than Overview is selected in the View By drop-down list in the Show Analytics Options pane.)	Drop-down list

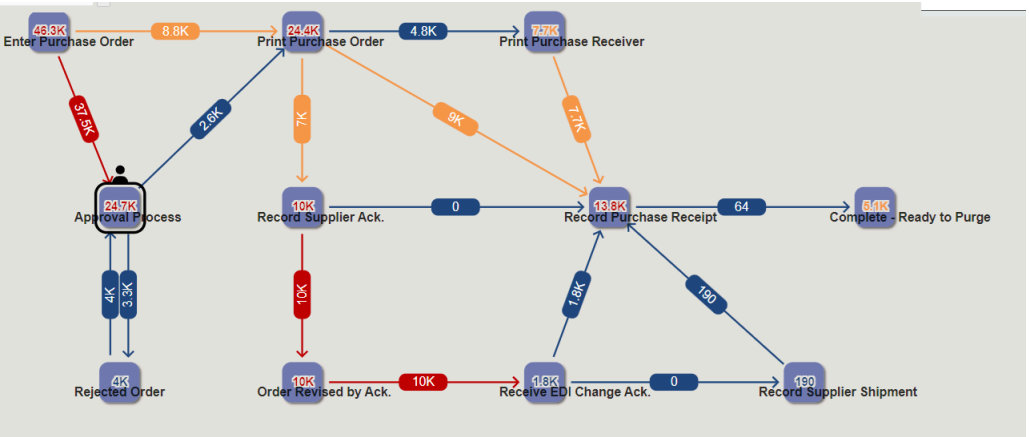
Understanding Color Codes

You can determine the status of the nodes and links by their color codes.

The threshold values for nodes and links can be defined using the Node Metrics and Link Metrics options. This table explains the colors and their corresponding statuses:

Colors	Status	Icons displayed in Node Metrics and Link Metrics Options
Blue	Normal	
Orange	Warning	
Red	Critical	

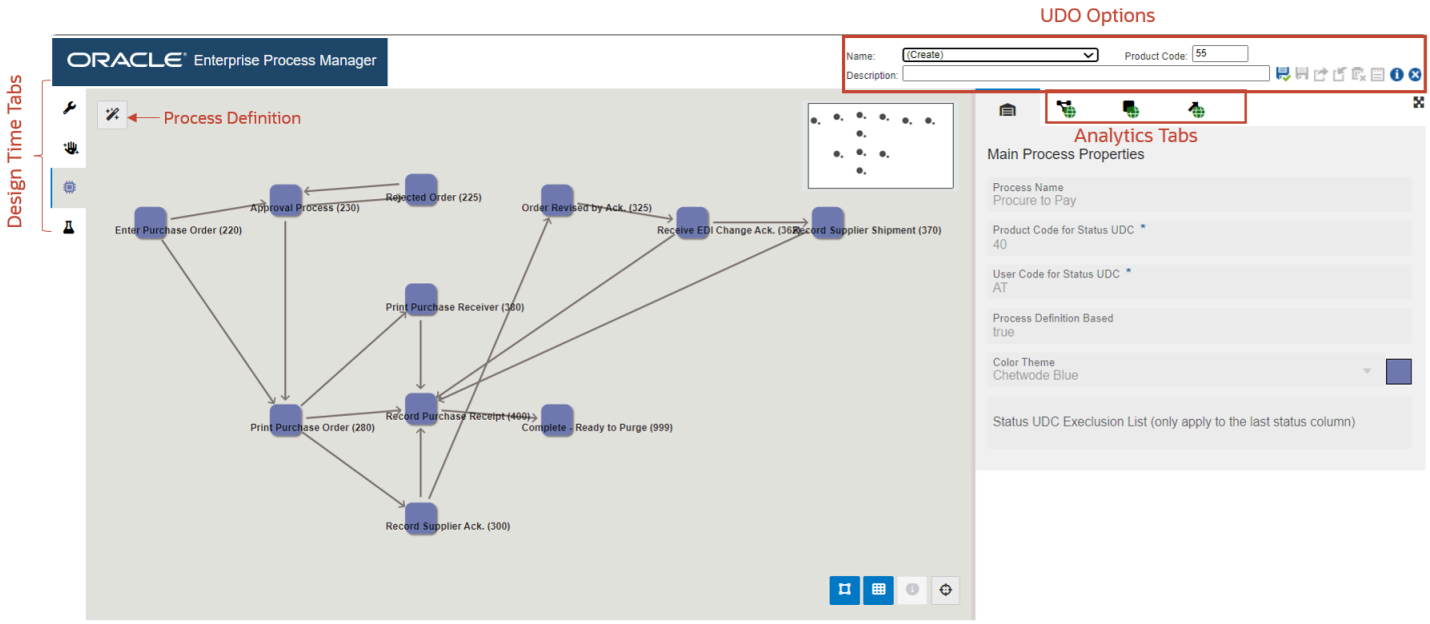
This example screenshot displays nodes, links, and their values in different colors to indicate the normal, warning, and critical statuses.



Understanding Enterprise Process Manager User Interface

The Enterprise Process Manager window (design time mode) displays the enterprise process diagram generated using the template you select while creating the process.

The window displays icons for filtering and refining the data displayed on the enterprise process diagram and analytics tabs. You can hover your mouse over the icons and tabs to view the label of the component. See *Creating an Enterprise Process*.



The enterprise process diagram displays nodes and the links between the nodes. The nodes represent the tasks in the process template and the links represent the connection between the nodes.

Process Definition : Displays the read-only tab with basic, filter, and status configuration details.

Design Time Tabs

The Enterprise Process Manager window displays the following tabs with design time details on the left side of the interface:

- **Design Option** (read-only)
- **Data Filtering and Grouping Options** (read-only)
- **Process Model** (The name of the template is displayed on this tab) : Displays the automatically generated process model diagram.
- **Preview** : Displays the preview of the runtime view for the selected template.

These analytics tabs are displayed in the Enterprise Process Manager window on the right:

- **Main Process Properties**
- **Process Metrics**
- **Nodes Metrics**
- **Links Metrics**

Preview Tab

In the Preview tab, the metrics and colors displayed on the nodes and links are based on the values selected in the Node Metrics and Link Metrics fields.

You can drag and drop the nodes to the desired location, and use the Snap to Grid , Snap to Node , and Zoom to Fit options to make changes to your layout.

You can use the following icons available above the model pane to view display, analytics, and filter options:

- **Show Display Options**

  When you click this icon, the system displays a left pane with display options. You can click the Hide View Options (X) icon to close this pane.

- **Show Analytics Options**

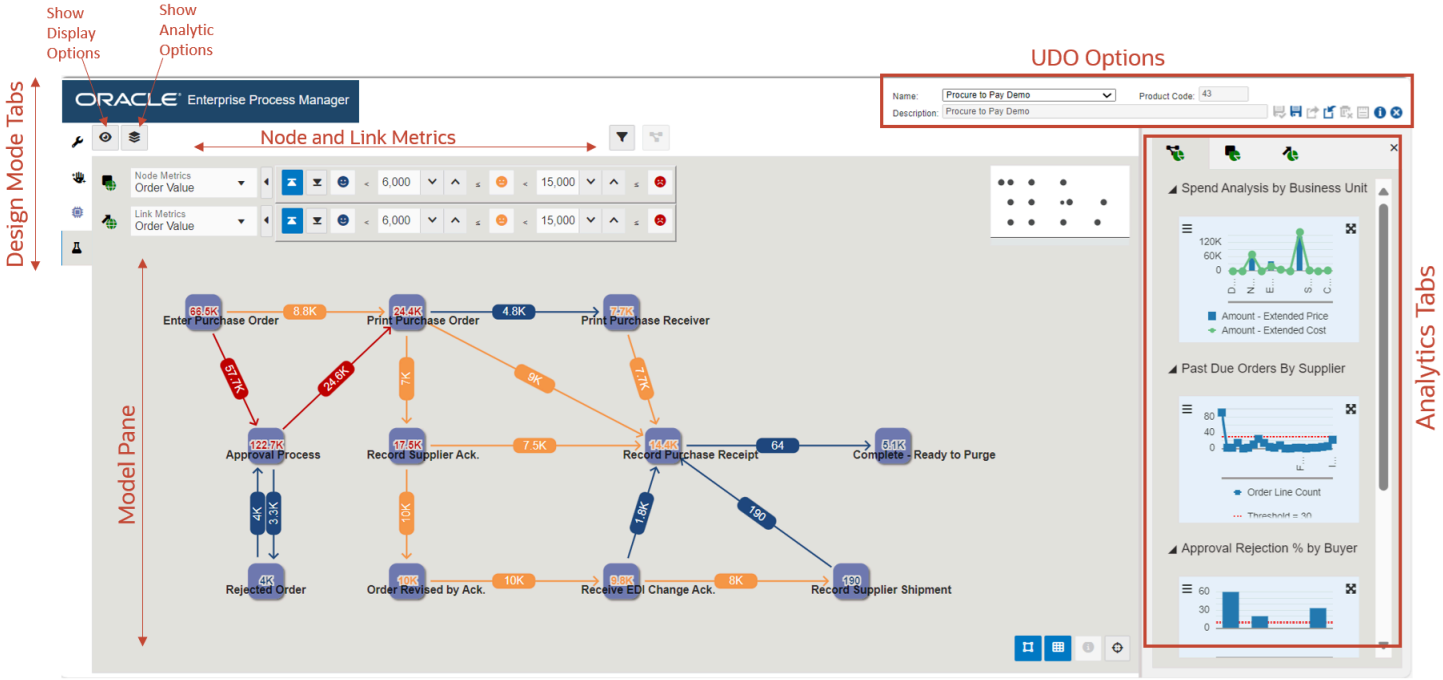
  When you click this icon, the system displays a left pane with analytics options. You can click the Hide View Options (X) icon to close this pane.

- **Show Filter Options**

  When you click this icon, the system displays a top pane (on top of the model pane) with filter options. You can click the Hide Filter Options (X) icon to close this pane.

The tabs at the right display the graphs to view analytical details of the enterprise process diagram, and you can refine the data displayed on the graphs by using the Configure icon on each graph. You can also hide and unhide the analytics tabs by using the Hide Context Analytics and Show Context Analytics icons. You can click the arrow icons to collapse or expand the individual graphs in the analytics tabs. Also, you can click the Maximize or Minimize icons on the graphs to view them in maximized or minimized modes.

The system displays the **Click to set the context to the process level** icon when the Node Analytics and Link Analytics tabs are displayed. You can click this icon to view the Process Analytics tab.



Between the left pane (displayed when you click Show Display Options or Show Analytic Options), model pane, and analytics pane, there is a resize area, which is highlighted when you hover over with your mouse cursor. You can drag it left or right to resize the panes.

UDO Options

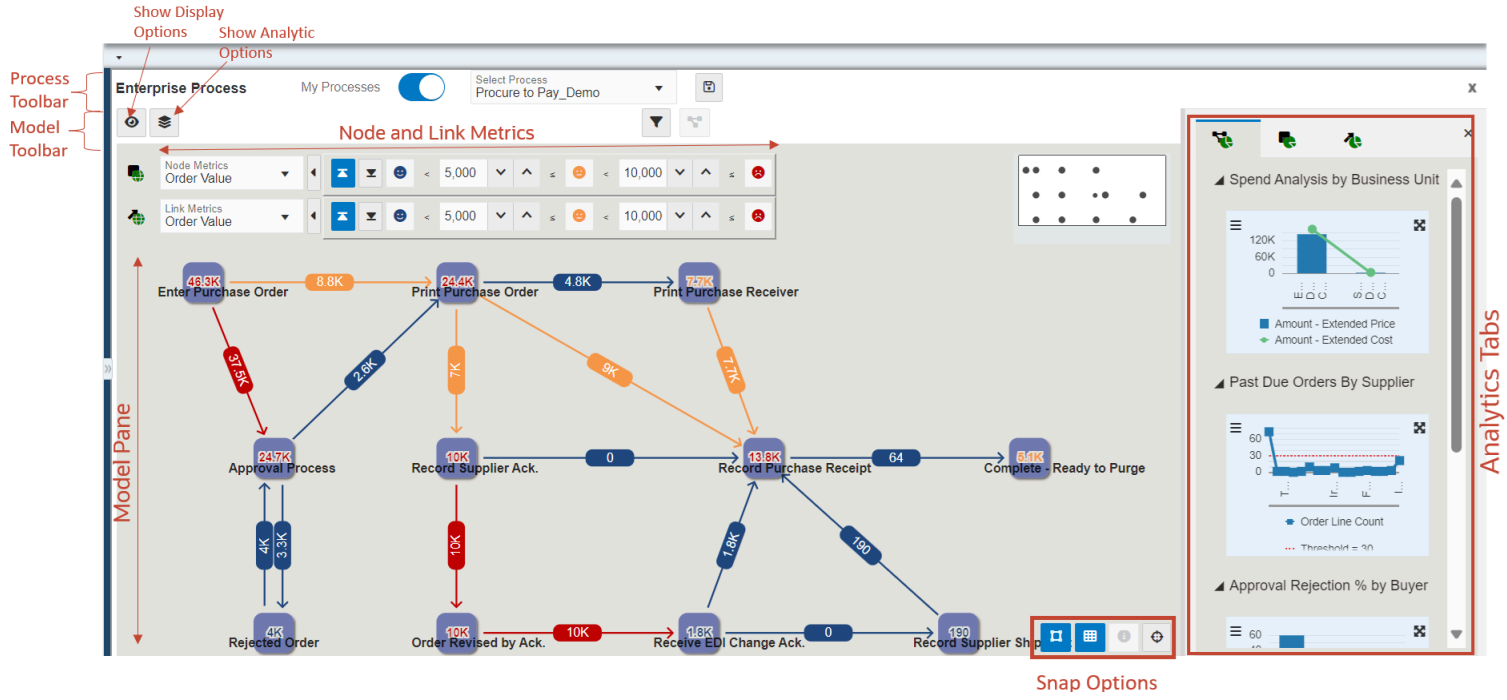
The system displays the following UDO options at the top of the window: Save, Save As, Request to Publish, Reserve, Delete, and Notes.

Understanding Enterprise Process User Interface

The Enterprise Process (runtime mode) window displays the enterprise process diagram generated using the template you select while creating the process. This window contains the following user interface elements: process toolbar, model toolbar, model pane, node and link metrics, analytics tabs and so on.

The window displays icons for filtering and refining the data displayed on the enterprise process diagram and analytics tabs. You can hover your mouse over the icons and tabs to view the label of the component.

Using the Enterprise Process window, you can make changes to the filters and analyze your process. See, *Analyzing an Enterprise Process*.



Process Toolbar

The process toolbar contains the following icons and options:

- **My Processes**: Enabled by default.
- **Process Selector**: This drop-down list contains the list of available enterprise process UDOs.
- **Snapshot**
- **Exit Runtime**: Closes the runtime Enterprise Process window.

Model Toolbar

The model toolbar contains the following icons and options:

- **Show Display Options**

  When you click this icon, the system displays a left pane with display options. You can click the Hide View Options (X) icon to close this pane.

- **Show Analytics Options**

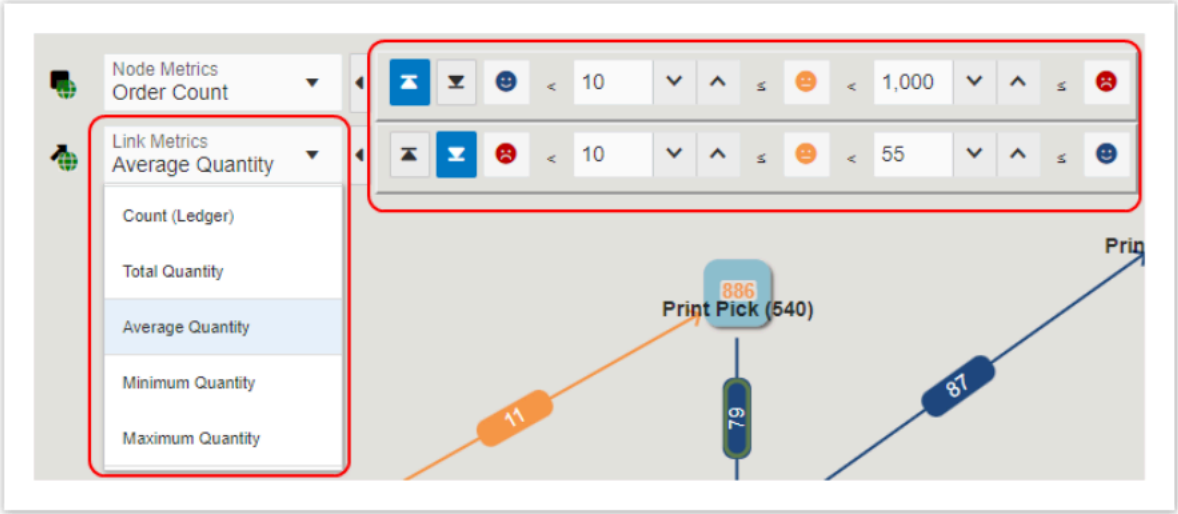
  When you click this icon, the system displays a left pane with analytics options. You can click the Hide View Options (X) icon to close this pane.

- **Show Filter Options**

  When you click this icon, the system displays a top pane (on top of the model pane) with filter options. You can click the Hide Filter Options (X) icon to close this pane.

Model Pane

In the model pane, you can select values and configure threshold values using the Node Metrics and Link Metrics fields. The threshold is associated with individual metrics (for both Node and Link metrics).



The enterprise process diagram is displayed along with nodes and the links between the nodes. The nodes represent the tasks in the process template and the links represent the connection between the nodes. The metrics and colors displayed on the nodes and links are based on the value selected in the Node Metrics and Link Metrics fields.

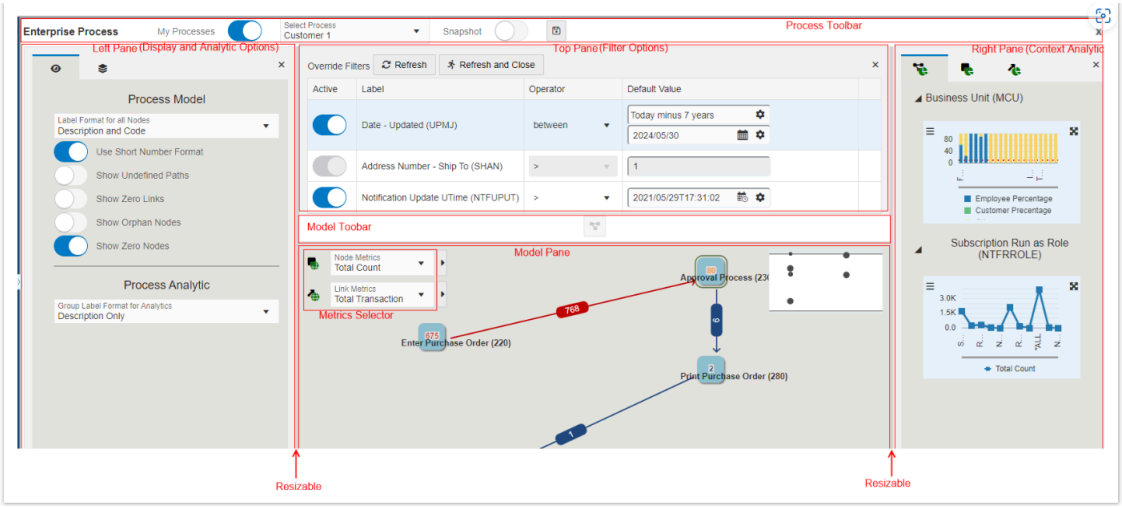
You can drag and drop the nodes to the desired location, and use the Snap to Grid , Snap to Node , and Zoom to Fit icons to make changes to your layout. You can hold down the Ctrl key when dragging and dropping a node to disable Snap to Grid and Snap to Node features temporarily.

The tabs at the right display the graphs to view analytical details of the enterprise process diagram, and you can refine the data displayed on the graphs by using the Configure icon on each graph. You can also hide and unhide the analytics tabs by using the Hide Context Analytics and Show Context Analytics icons. You can

click the arrow icons to collapse or expand the individual graphs in the analytics tabs. Also, you can click the Maximize or Minimize icons on the graphs to view them in maximized or minimized modes.

The system displays the **Click to set the context to the process level** icon when the Node Analytics and Link Analytics tabs are displayed. You can click this icon to view the Process Analytics tab.

You can show or hide all the panes:



Between the left pane (displayed when you click Show Display Options or Show Analytic Options), model pane, and analytics pane, there is a resize area, which is highlighted when you hover over with your mouse cursor. You can drag it left or right to resize the panes.

3 Creating an Enterprise Process

Creating an Enterprise Process

You can create an enterprise process using the design mode in the Enterprise Modeler. The design mode enables you to select a template provided by the system and configure the source of data for metrics, measurements, and KPIs, and to define certain aggregations or calculations (sum, average, and so on.) for those metrics. You can then save your configurations as a process UDO. For more information, see <link to UDO information>.

To create a new enterprise process:

1. Access the JD Edwards EnterpriseOne application.
2. From the User menu, click **Manage Content**, and select **Processes**.

   The system displays the Create Process window.

   > **Note:** The Create Process window is only displayed when you are creating an enterprise process for the first time. After creating a process, when you click **Processes** again, the system displays the previously created process layout along with the template used for its creation and the design time options.

   If you want to create a new process, in the Enterprise Process Manager window, click the **Name** drop-down list, and in the Personal section, select **Create**.
3. From the Import Process Template drop-down list, select a template. The available templates (Tools Release 9.2.9) are:
   - JDE TMPL Procure to Pay
   - JDE TMPL Order to Cash

   For more information, see:
   - *Enterprise Process Modeler for Procure to Pay*
   - *Enterprise Process Modeler for Order to Cash*
4. Click **OK**. The available design time fields are displayed in the Create Process window.
5. You can either enter the design time values for these fields or accept the default values.
   - **Order Type (DCTO):** Depending on the template you select, this value may be read-only or editable.
   - **Line Type (LNTY):** Depending on the template you select, this value may be read-only or editable.

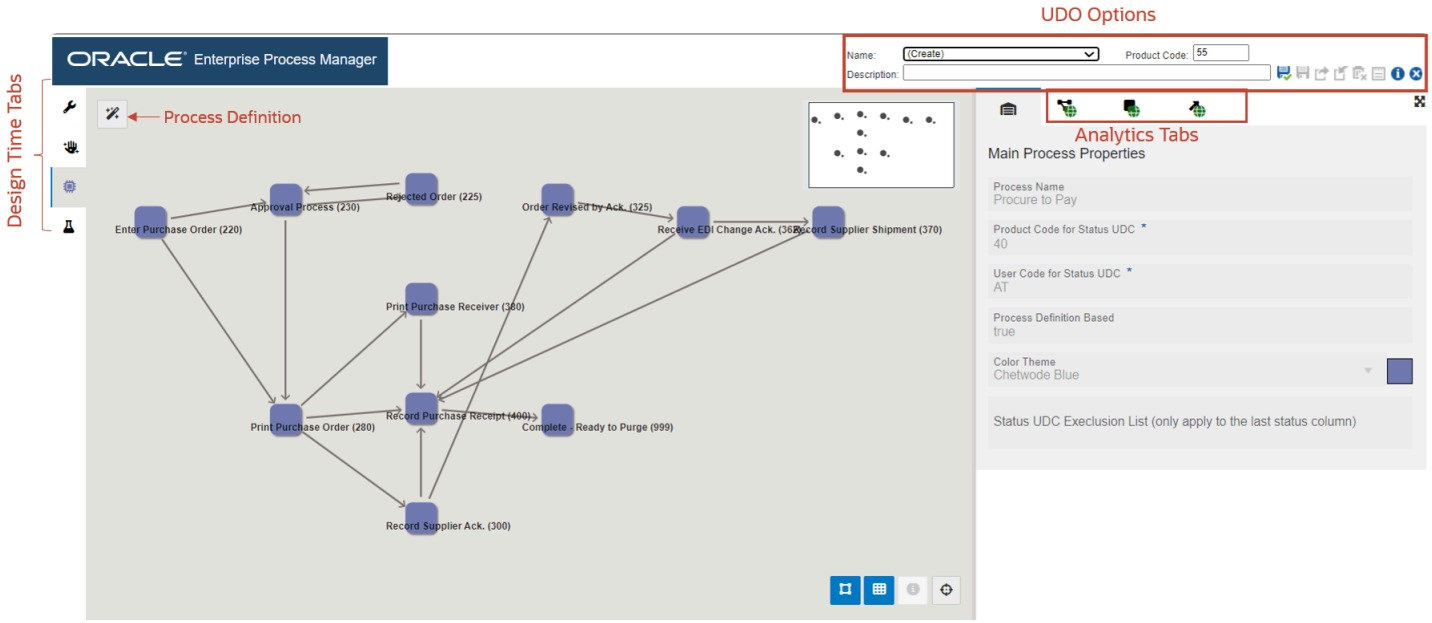
     > **Note:** The system displays the design time field names based on the template you select. Therefore, the field names displayed in your environment may differ. The system allows editing the design time field values depending on the template you select.

   - **Start Status**: Select the value from the drop-down list. The system displays the available nodes from template you selected in this drop-down list. The value you select in this field becomes the first (start) node in the automatically generated process model.

6. Click **OK**. The Main Module tab is displayed in the Enterprise Process Manager window, where you can see the automatically generated enterprise process diagram based on the selected template and values defined in the Create Process window.

   The nodes represent the tasks in the process template and the links represent the connection between the nodes.

   Before saving your enterprise process, you can adjust the template and review the configurations to ensure that the data and metrics are defined according to your requirements.



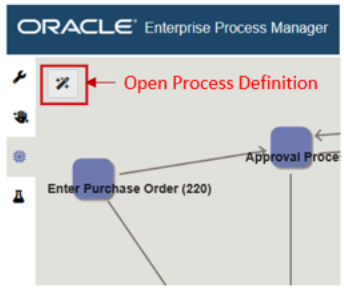
7. You can drag and drop the nodes to the required position and use the following options to adjust the template:

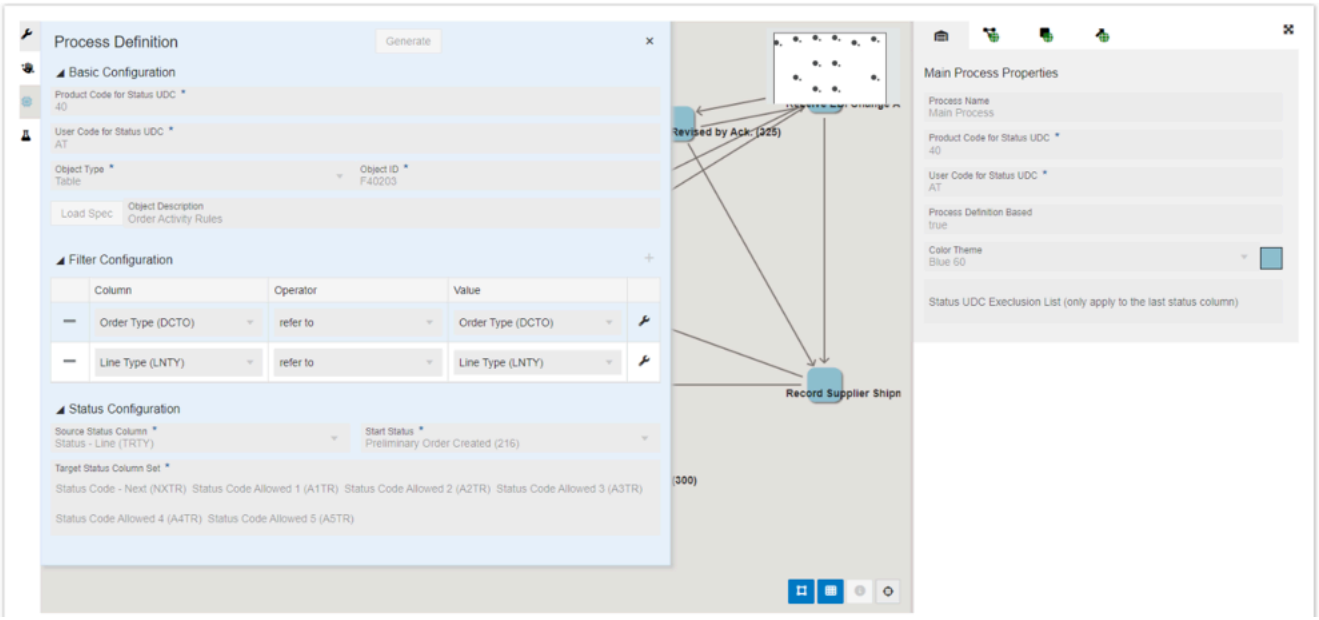
   Note: You can also use these options to make changes to the enterprise process diagram:

   - **Snap to Node:** Click the **Snap to Node** icon to align the template to the node points.
   - **Snap to Grid:** Click the **Snap to Grid** icon to align the template to the grid points.
   - **Zoom to Fit:** Click the **Zoom to Fit** icon to resize the template to fit into the model pane.

   You can hold down the Ctrl key when dragging and dropping a node to disable Snap to Grid and Snap to Node features temporarily.

8. Click the **Open Process Definition** icon  (next to Design Option) to review the settings in the read-only mode.





9. In the Process Model tab, to review the details of the metrics, click the following tabs on the right:

> **Note:** You can click the subtabs on these tabs to review the table specific metrics and business views. Use Maximize  or Minimize  on the tabs to view them in maximized or minimized modes.

- **Main Process Properties**  : Displays the process name, status codes, and color themes in read-only mode.
- **Process Metrics**  : Displays tabs with details such as Filter Criteria, Return Fields, Context Analytics and so on for the related tables and business views of the selected enterprise process template.
- **Nodes Metrics**  : Displays tabs with details such as Filter Criteria, Return Fields, Context Analytics and so on for the node specific tables and business views.
- **Links Metrics**  : Displays tabs with details such as Filter Criteria, Return Fields, Context Analytics and so on for the link specific tables and business views.

10. To review the node properties such as Type and UDC status, click the individual nodes in the process model diagram. The system displays the Selected Node Properties tab (read-only) on the right.
11. To review the link properties, click the individual links in the process model diagram. The system displays the Selected Link Properties tab (read-only) on the right.
12. Click the following tabs on the left to review the details:
    - **Design Option** (read-only) : This tab displays the values you entered in the Create Process window.
    - **Data Filtering and Grouping Options** (read-only) : This tab displays the template specific data filtering and grouping options.
    - **Process Model** (The name of the template is displayed for this tab) : This tab displays the automatically generated process model diagram.
    - **Preview** : In this tab, you can preview the runtime view with the current runtime metrics defined in the selected template. For more information on how to preview the metrics by using the Preview tab, see *Previewing the Enterprise Process Template*.

Previewing the Enterprise Process Template

You can preview the runtime view with the current runtime metrics defined in the template in the Enterprise Process Manager window by using the Preview tab (preview mode). The system displays the template specific preview in the model pane and the Process Analytics tab on the right.

> **Note:** In the preview mode, you can adjust the position of the nodes, change the default filters, modify the display options, configure the metrics thresholds, set up chart configurations within the analytic panes, use the snap to node and grid, and zoom to fit options. All these changes can be saved in the preview mode.

To preview the runtime metrics of the enterprise process and make the changes (optional) to the settings:

1. In the Enterprise Process Manager window, click the **Preview** tab. The Process Analytics tab is displayed on the right. This tab displays the analytics charts for the enterprise process.

   When you click a node, the Node Analytics tab is displayed along with the specific node-related metrics, and when you click a link, the Link Analytics tab is displayed along with the specific link-related metrics.
2. You can drag and drop the nodes to change their positions. You can use the **Snap to Node**, **Snap to Grid**, and **Zoom to Fit** options to make changes to the layout of the enterprise process diagram.

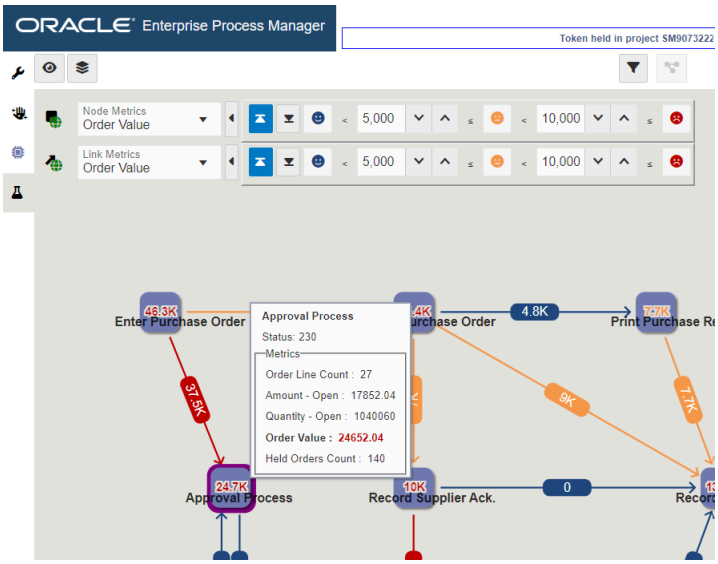
3. You can make changes to the metrics of the nodes and links by selecting the values from the **Node Metrics** and **Link Metrics** drop-down lists. Click the arrow icon next to the Node Metrics and Link Metrics fields to change the threshold values.

   > **Note:** The values and colors change on the nodes and links in the enterprise process diagram when you make changes to the Node Metrics and Link Metrics fields. See *Understanding Color Codes*.

   To preview the node and link metric details:

   a. Hover over the node to view the status code and metric details on the hover form. On the hover form, the field selected in the Node Metrics drop-down list is displayed in bold and its value is displayed in the threshold color.

      In the following example screenshot, you can see that the Order Value is selected in the Node Metrics drop-down list. The value is displayed in red, since it exceeds the threshold value.



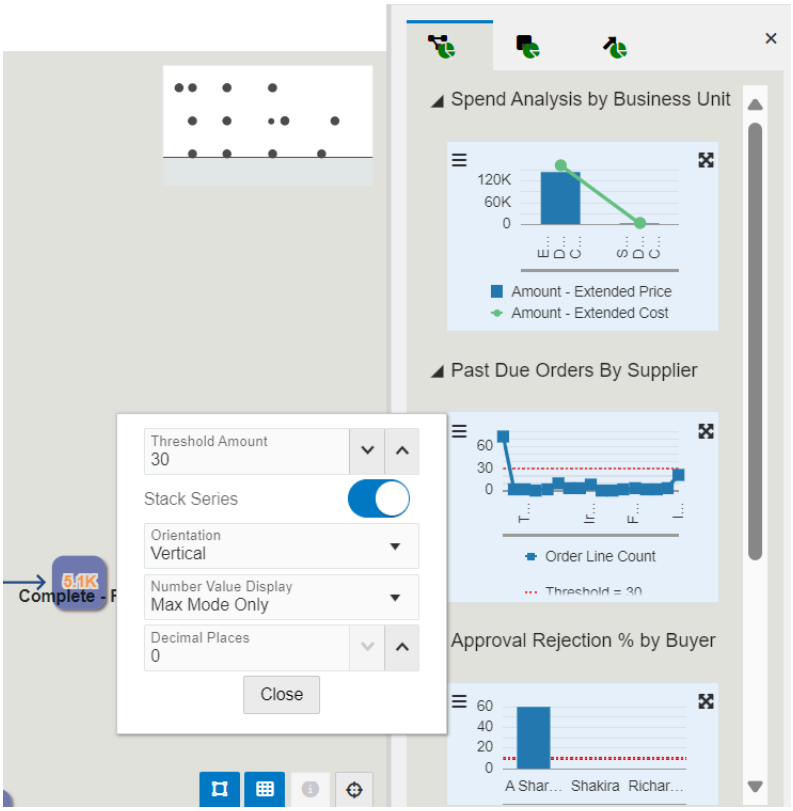
   b. Hover over the individual link to view the From and To details and metrics on the hover form. On the hover form, the field selected in the Link Metrics drop-down list is displayed in bold and its value is displayed in the threshold color.

4. To refine the analytics details in the Process Analytics tab use the following filtering options:

   > **Note:** You can click the arrow icons to collapse or expand the individual charts in the analytics tabs. Also, you can click the Maximize or Minimize icons on the charts to view them in maximized or minimized modes.

   a. On the chart, click the **Configure** icon and enable the **Stack Series** option if you want to view the bar chart or pie chart in the stack chart format .
   b. Select the values as required in the Configure window for the charts such as Orientation (Vertical or Horizontal), Number Value Display (Never, Always, or Max Mode Only) and so on. In the Process Analytics tab, you may see the fields such as Threshold Amount, or Alert Limit displayed

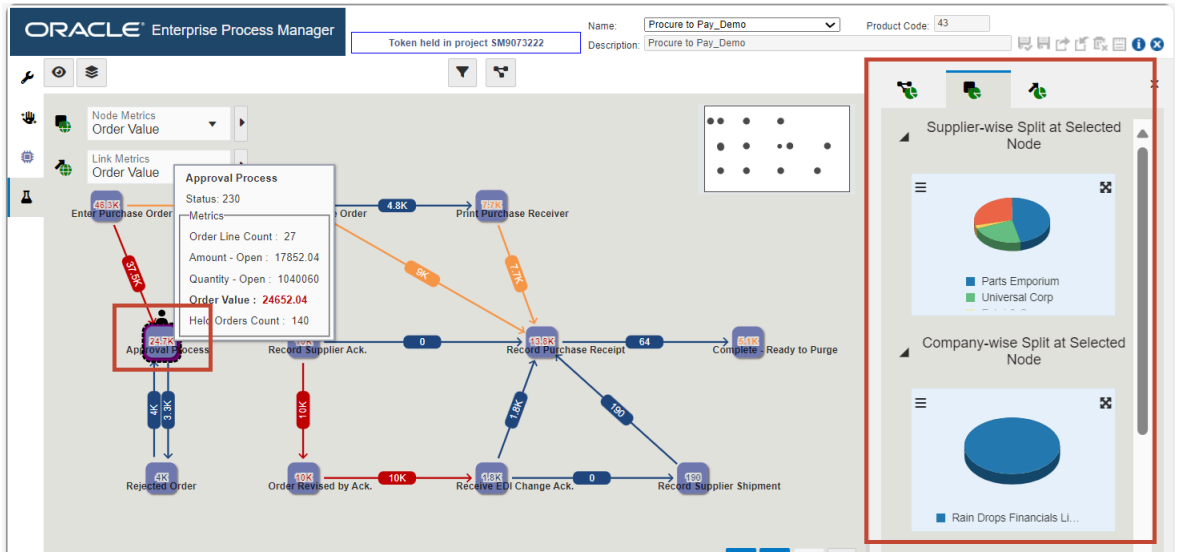
in the Configure window depending on the template you select in the design time mode.



c. Hover over the colors on the charts to review the details of the individual record.

5. Click the node to view the node-specific analytics in the Node Analytics tab on the right.

   Note: The system displays a People icon and a border to indicate that the node is selected. The system displays a dashed border (with a "marching ants" effect) around the node when you hover over a selected node.



   To refine the node details, use the following filtering options:

   a. Click the **Configure** icon ☰ and enable the **Stack Series** option to view the charts in the stack chart format.
   b. Select the values as required in the Configure window for the charts such as Number Value Display (Never, Always, or Max Mode Only) and Decimal Places (you can use the arrow icons in the field to increase or decrease the numbers).
   c. Hover over the colors in the stack or pie chart to review the details.

6. When you click a link, the system displays link-specific analytics in the Link Analytics tab on the right.

   Note: The system displays a People icon and a border around the value of the link to indicate that the link is selected. The system displays a dashed border (with a "marching ants" effect) around the value on the link when you hover over a selected node.

   To refine the link details, use the following options:

   a. Click the **Configure** icon ☰ and enable the **Stack Series** option to view the charts in the stack chart format.
   b. Select the values as required in the Configure window for the charts such as Number Value Display (Never, Always, or Max Mode Only) and Decimal Places (you can use the arrow icons in the field to increase or decrease the numbers).
   c. Hover over the colors in the stack or pie chart to review the details.

   Note: You can click the **Click to set the context to the process level** icon to view the Process Analytics tab.

7. Click the **Show Display Options** icon  . This tab enables you to choose the display options for your enterprise process model.

    a. From the Label Format for all Nodes drop-down list, you can choose the Description and Code, Description Only, or Code Only values. The system displays the selected label format on the nodes in the process model diagram.
    b. To further refine your process model diagram, enable or disable the Use Short Number Format, Show Undefined Paths, Show Zero Links, Show Orphan Nodes, and Show Zero Nodes options as required for your process model template.
    c. In the Analytics Lables section, select the values in Group Label Format for Analytics drop-down list. You can choose the Description and Code, Description Only, or Code Only fields. The system displays the selected label format in the analytics tabs.

8. Click the **Show Analytics Options** icon  . Select the values from the View By drop-down list. The values displayed in this drop-down list are based on the selected template. If you select an option other than Overview, either a Timeline view (for Date and UTIME data types) or a Domain view (for other data types) is displayed. You can make changes to the node and link metrics in the Timeline and Domain views. The system displays the corresponding changes in the analytics tab on the right.
9. Click **Save**. The system saves the enterprise process as a UDO.

> **Note:** You can reopen the existing personal enterprise process UDOs later, modify the settings, and click **Save** to save them again to overwrite the previous version. You can click **Save As** to save the UDO with a new name. If you click **Close** before saving your changes, the system displays the **Do you want to discard your changes?** message. You can click **OK** to discard your changes or click **Cancel** to proceed and save the changes.

User Defined Object (UDO) Features in Enterprise Process Manager

Enterprise Processes are saved and managed as UDOs in EnterpriseOne. The Enterprise Process Manager includes UDO options on the tool bar that enable you to create enterprise processes for your personal use, publish or share them, and modify shared enterprise processes that are created by other users.

Note: The actions that you are allowed to perform in the Enterprise Process Manager depend on the UDO security permissions that are granted to you by a system administrator. See Setting Up UDO Security for Enterprise Process Manager Users in this guide for more information.

Enterprise processes as UDOs enables administrators to use EnterpriseOne administration tools to manage the life cycle of enterprise processes. For more information about the life cycle management of UDOs, see *"UDO Life Cycle and Statuses" in the JD Edwards EnterpriseOne Tools Using and Approving User Defined Objects Guide* .

The following table describes the UDO options that are available in the toolbar of the Enterprise Process Manager window and the life cycle status enacted by each UDO action.

UDO Options	Description
Save As	Saves the enterprise process to a status of "Personal." Components with a status of "Personal" are components that are being developed and are not shared for publishing to the AIS Server.

UDO Options	Description
Request to Publish	Sends the enterprise process for approval for sharing. An administrator or approver must approve the enterprise process so that it can be shared. The status changes to "Pending Approval" in the list and then changes to "Shared" when the enterprise process is approved. If rejected, the status changes to "Rework." At that point, you can edit the enterprise process and then use the Request to Publish button to send it for approval again.
Reserve	Reserves a shared UDO so that you can modify it. When reserved, no other users can make changes to a UDO. The component status changes to "Reserved."
Unreserve	Cancels the reserved enterprise process. This action changes the status of the component back to "Shared."
Notes	Available when the enterprise process is in the "Pending Approval" status, this option enables you to add an additional note to send to the approver of the UDO. The Notes option is active only if a note was added the first time the UDO was sent for approval using the "Request to Publish" option. This feature enables you to add an addendum to the original note.

Language Support

UDO object and content translations are supported for the Process UDO in the runtime mode.

For more information about UDO language translations, see *Translations*.

4 Analyzing an Enterprise Process

Selecting My Processes

To select your preferred processes to be displayed in the Enterprise Process (runtime mode) window:

1. Access the JD Edwards EnterpriseOne application.
2. From the User menu, click **My Content**, and select **My Processes**.

   The system displays the Select My Processes window along with a list of enterprise processes you created.
3. Click **Select All**, or select the individual process as required.
4. Click **Save**.

   The selected processes are displayed in the Select Process drop-down list of the Enterprise Process window.

Analyzing an Enterprise Process

You can view and analyze the enterprise processes by using the Enterprise Process Modeler in the runtime mode. This mode enables you to choose from a set of user generated enterprise process UDOs, visualize a graphic of the process model, visualize KPIs, metrics and measurements that apply to nodes and connections within the process model, and other functions.

To analyze an enterprise process:

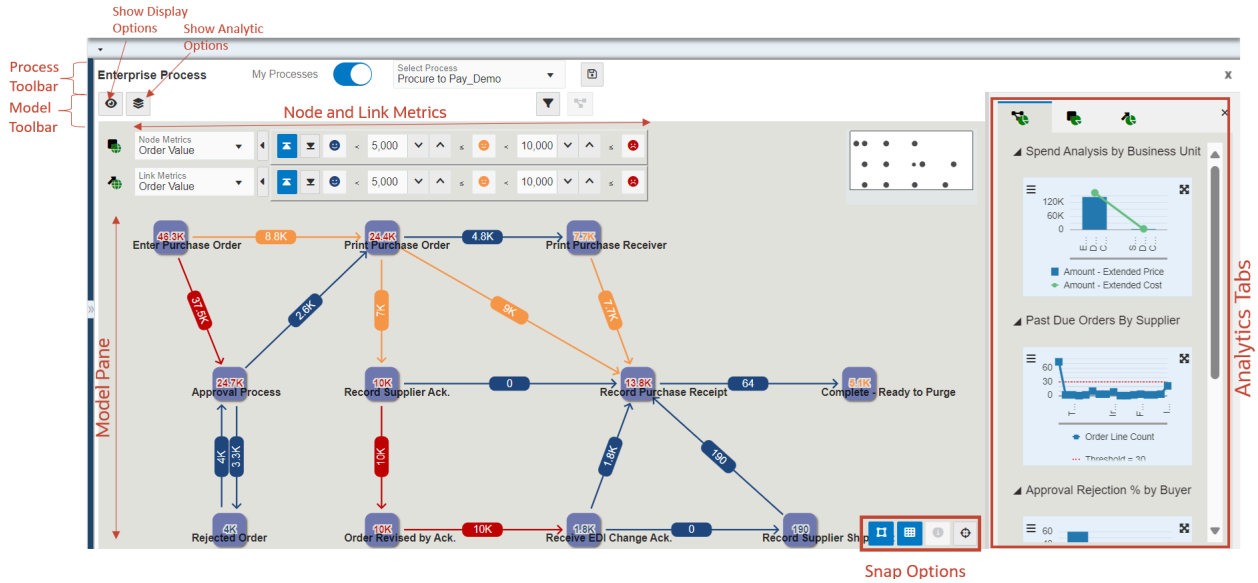
1. Access the JD Edwards EnterpriseOne application.

2. From the User menu, click **Enterprise Processes**.
   The Enterprise Process window is displayed along with the enterprise process diagram of the process displayed in the Select Process drop-down list. You can also see that the Enterprise Process is now added to the Open Applications carousel.

   > **Note:** The Enterprise Processes link is only displayed if you have at least one enterprise process UDO object (either personal or with view access to a shared UDO). Also, the Enterprise Process must be active in Feature Security. See *Managing UDO Feature Security.*

   > **Note:** You can open any application and toggle between the application window and the Enterprise Process window. Both the default and large carousel icons (set in the Preferences window) will work as expected when the carousel is positioned in four different places.

   The following screenshot shows an example enterprise process in the Enterprise Process window. The window contains the following user interface elements: process toolbar, model toolbar, model pane, node and link metrics, analytics tabs, and so on. See, *Understanding Enterprise Process User Interface*.



3. You can drag and drop the nodes to change their positions. You can use the **Snap to Node**, **Snap to Grid**, and **Zoom to Fit** options to make changes to the layout of the enterprise process diagram.
4. You can make these changes using the process toolbar.
   a. The My Processes option is enabled by default and the processes selected in the Select My Processes window are displayed in the Select Process drop-down list. See *Selecting My Processes*.
      You can disable the My Processes option to see all the personal and shared enterprise process UDOs in the Select Process drop-down list.

      > **Note:** The system displays a black dot icon next to the process names that are saved as Personal UDOs in the Select Processes drop-down list when My Processes is enabled.

   b. Select the required process from the Select Process drop-down list. The system displays the runtime view of the selected process.
   c. Click the **Save As Snapshot** icon to save the enterprise process as a snapshot. See, *Analyzing Snapshot*.
   d. You can click the **Exit Runtime** icon to close the Enterprise Process window.

Proceed to the next sections to understand how to use the filter options available in the Enterprise Process window and analyze the enterprise process.

Using the Show Display Option

You can analyze the enterprise process by using the Show Display Options in the model toolbar.

The system displays the changes on the enterprise process diagram and analytics tabs when you make changes in the Display Options pane.

Show Display Options:

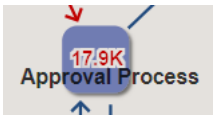
1. In the model toolbar, click **Show Display Options** . The system displays the left pane (Display Options pane) along with the Process Model and Process Analytics section.
2. From the Label Format for all Nodes drop-down list, select any of these options:
   - **Description and Code**:

     Displays both the description and status code on the nodes.

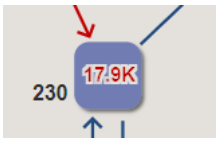
   - **Description Only**:

     Displays the descriptions on the nodes.

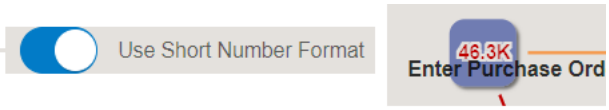
   - **Code Only**:

     Displays the status codes on the nodes.

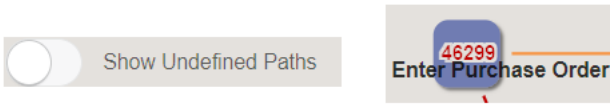
     

3. Enable or disable these options as required:
   - **Use Short Number Format**: Changes the number format displayed on the nodes. The system uses K, M, B, T to represent thousands, millions, billions, and so on if the value is greater than 1 unit.

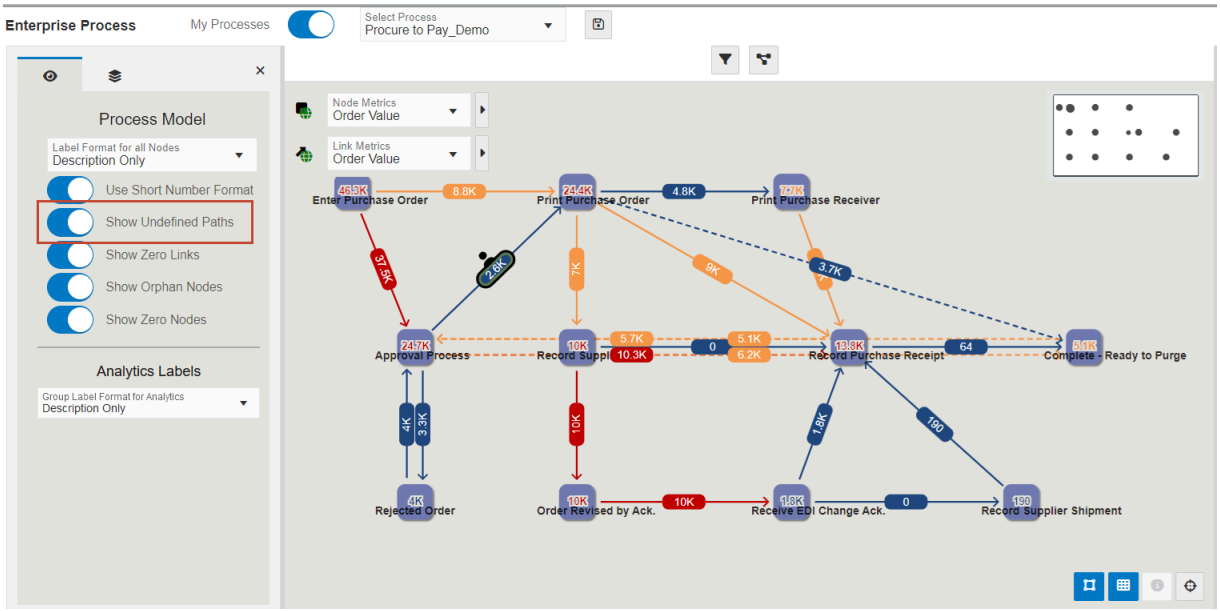
     Example: User Short Number Format Enabled

     Example: User Short Number Format Disabled

   - **Show Undefined Paths**: Displays the paths that are not defined in the process definition. When you enable this option, the system shows the undefined paths from the runtime data which do not exist in the activity rule of the process definition. Undefined paths are presented with a special outline and dashed line on the enterprise process diagram.

   - **Show Zero Links**: Displays the links with the zero value.
   - **Show Orphan Nodes**: Displays the nodes that are connected by zero value links.
   - **Show Zero Nodes**: Displays the nodes with zero value.
4. In the Analytics Labels section, from the Group Label Format for Analytics drop-down list, select any of these options:
   - **Description and Code**: Displays both the description and the status code on the charts.
   - **Description Only**: Displays the descriptions on the charts.
   - **Code Only**: Displays the status codes on the charts.
5. Click the **Hide View Options** icon to close the pane.

Using the Show Analytics Option

You can analyze the enterprise process by using the Show Analytics option in the model toolbar.

The system displays the changes on the enterprise process diagram and analytics tabs when you make changes in the Analytics Options pane.

1. In the model toolbar, click **Show Analytics Options**  . The system displays the left pane along with the View By drop-down list.

2. In the View By drop-down list, the **Overview** option is selected by default. You can select from the other available options. The other options are displayed based on the template.

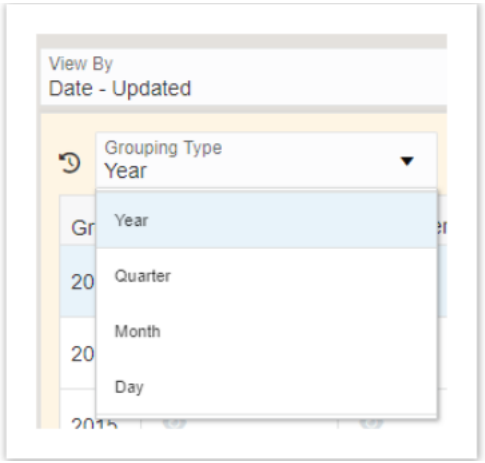
   If you select an option other than Overview, either a Timeline view (for Date and UTIME data types) or a Domain view (for other data types) is displayed.

   Timeline View for Date and UTime Data Types

   The system displays a Timeline View indicator when you select a Date or an UTIME data type from the View By drop-down list.

   You can use the following options to analyze the process:

   a. Select any of these options from the Grouping Type drop-down list: Year (calendar year), Quarter (calendar quarter), Month, and Day.

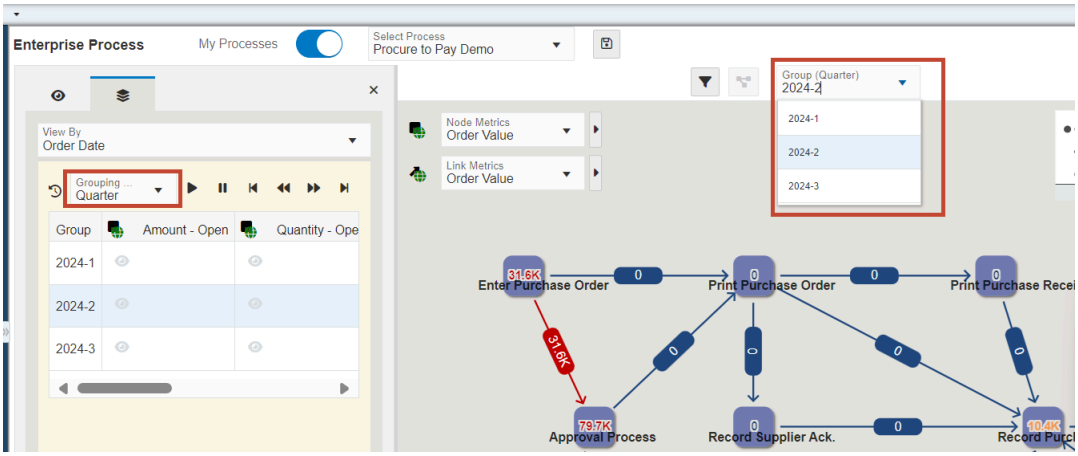
   

   .

   b. When you select a value from the Grouping Type drop-down list, the system displays a corresponding new drop-down list above the model pane.

      For example, if you select Grouping Type as Year, Quarter, or Month, a new drop-down list called Group (Year), Group (Quarter), or Group (Month) is displayed.

      Select a value from the Group (Quarter) drop-down list (either from the field in the Display Options pane or the field above the model pane). The system displays the corresponding data on the enterprise process diagram and on the analytics tabs on the right.

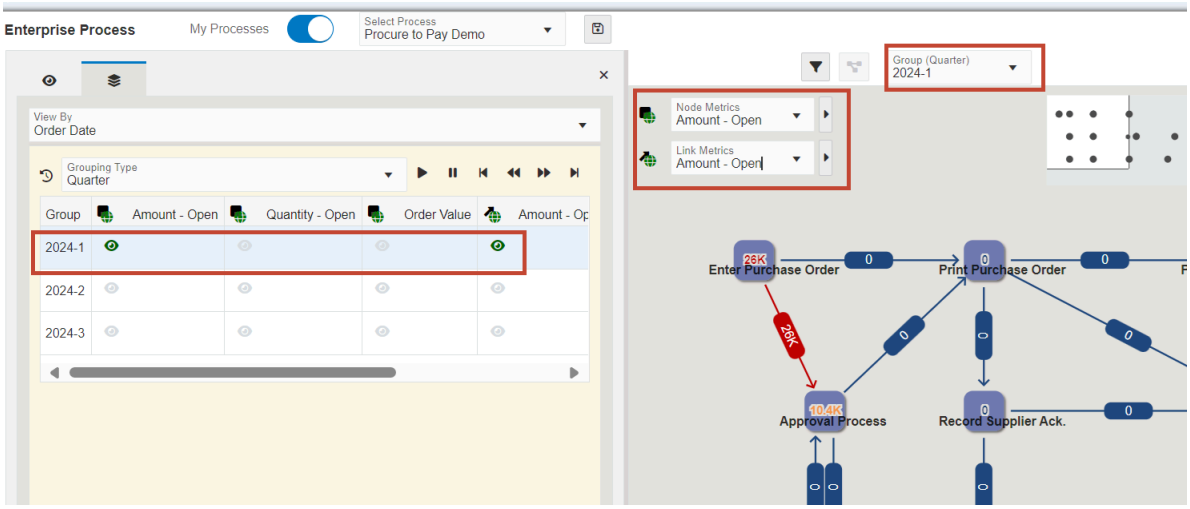


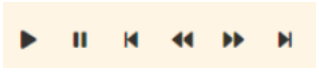
C. To analyze the enterprise process using different values, click the **Select Metrics** icon on the rows to select a value for the Node and Link Metrics. The system changes the values accordingly in the Node Metrics and Link Metrics fields and displays the changes on the enterprise process diagram and analytics tab on the right.

The node and link metrics are selected for the first available value from the Grouping Type drop-down list by default.

For example, in the following screenshot, in the 2024-1 row, the metrics are selected (indicated by the **Select Metrics** icon) for the Amount-Open columns for Node Metrics and Link Metrics. The

Amount-Open value is selected in the Node Metrics and Link Metrics fields in the model pane too.



d. Use the following group navigation controls to view a specific data: Start, Pause, Begin, Previous, Next, and End.  .

When you click the **Start** icon, the system plays back data from all the rows in the selected group from beginning to end in order. The system displays the changes on the enterprise process diagram and the analytics tabs during the playback.

> **Note:** The playback is indicated by a "moving hand on the clock"  effect.

You can click **Pause** to interrupt the playback.

Domain View for Other Data Types

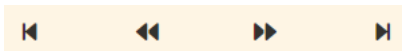
The system displays a Domain View  indicator when you select a data type other than Date or UTIME the View By drop-down list.

You can use the following options to analyze the process:

a. The system displays the Group drop-down list above the model pane when you select any data type other than Date or UTIME. The first group is select by default in the Group drop-down list. Click the Group drop-down list to select a new value.

b. Click the **Select Metrics**  icon on the rows to select a value for Node and Link Metrics. The system changes the values accordingly in the Node Metrics and Link Metrics fields and displays the changes on the enterprise process diagram and analytics tabs on the right.

By default, the node and link metrics are selected (indicated by the **Select Metrics**  icon) for the first group in the Domain View panel.

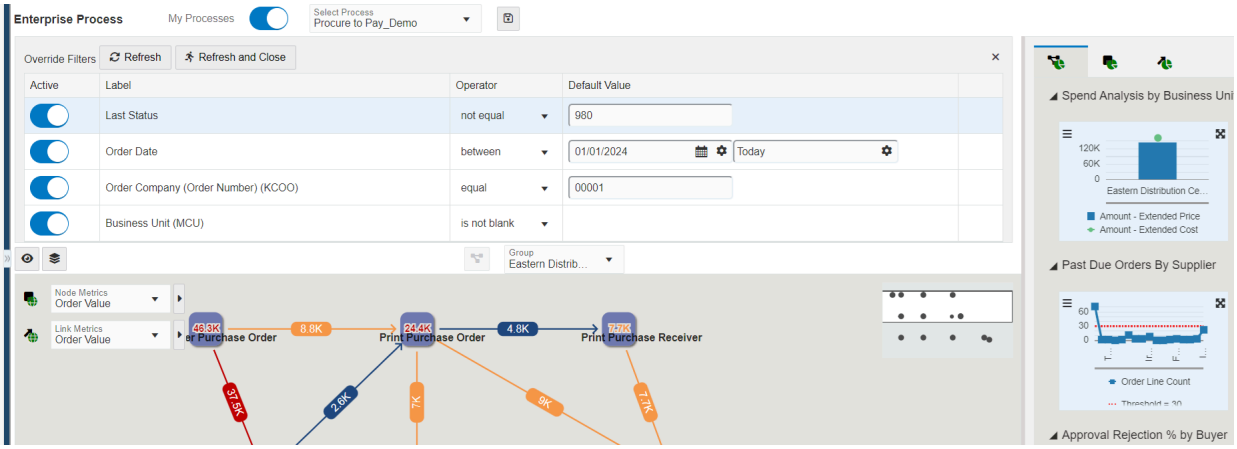
3. Click the **Begin**, **Previous**, **Next**, and **End** icons  to view the Node and Link metrics of different groups.
4. Click the **Hide View Options** icon (X) to close the Analytics Options pane.

Using the Show Filter Options

You can analyze the enterprise process by using **Show Filter Options** above the model pane.

1. Click the **Show Filter Options** icon  (located above the model pane).

   The system displays a pane above the model pane with filter options based on the template, and some fields may be read-only. The following screenshot shows an example top pane:



2. In the **Active** field, you can disable the option to skip the filter field.
3. From the Operator drop-down list, select the required operator value.

   The system supports the following filter operator values for the data types:

   - **Number**: =, !=, <, >, <=, >=, between, and in list.
   - **String**: equal, not equal, greater than, greater equal, less than, less equal, contains, starts with, ends with, is blank, is not blank, between, and in list.
   - **Date**: =, !=, <, >, <=, >=, between, and is blank and is not blank.
   - **UTIME**: =, !=, <, >, <=, and >=.

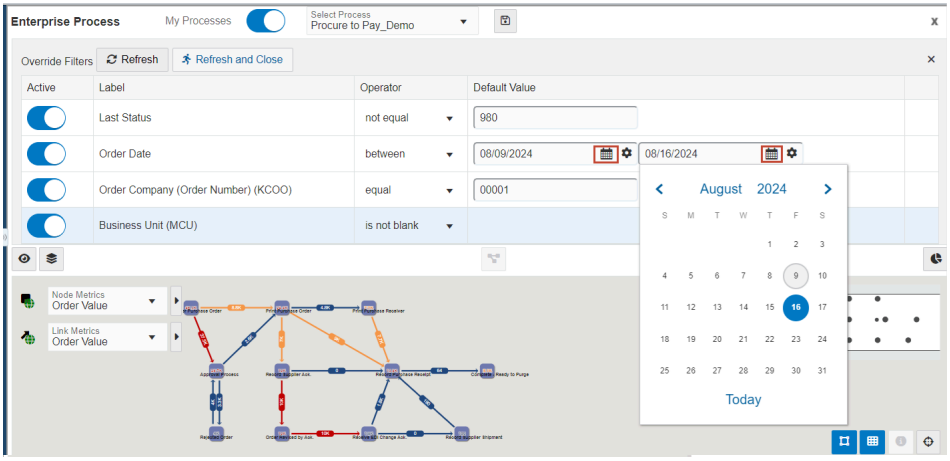
4. In the Default Value field, either enter a value or select a date value.

   The system supports the following filter values:

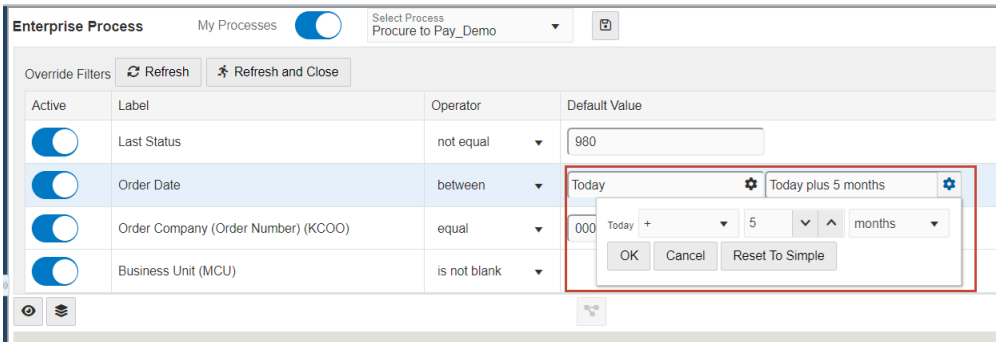
   - No value is required for "is blank" and "is not blank" operators.
   - Allow list editing for "in list" operator (system supports tab key, auto-clean empty entries, keep at least one entry). When you type the last entry, the system automatically appends a new empty input as the last entry.
   - Two-value ranges for "between" operator (both values must be provided).
   - Single value required for other operators; empty values are invalid.

   The system supports the following calendar and special value controls:

   - Click the **Calendar** icon and select the required date from the calendar window to enter the date in simple date format. For example, `01/01/2024`.



   - Click the **Configure** icon and select the special date format. You can click the **Reset to Simple** button to reset the date to the simple date format. For example, `Today plus 5 months`.



   Note: A validation error is displayed for the incomplete rows.

5. If you want to see the refreshed results on the enterprise process diagram and analytics tabs and want to keep the filter option pane open, click **Refresh**.

   If you want to see the refreshed results on the enterprise process diagram and analytics tabs and want to close the filter option pane, click **Refresh and Close**.

Using the Node and Link Metrics

You can analyze the enterprise process by making changes using the Node Metrics and Link Metrics drop-down lists. When you make changes in the Node Metrics and Link Metrics fields, the values and colors on the nodes and links on the enterprise process diagram changes accordingly and the system displays the corresponding change on the charts in the Node Analytics and Link Analytics tabs.

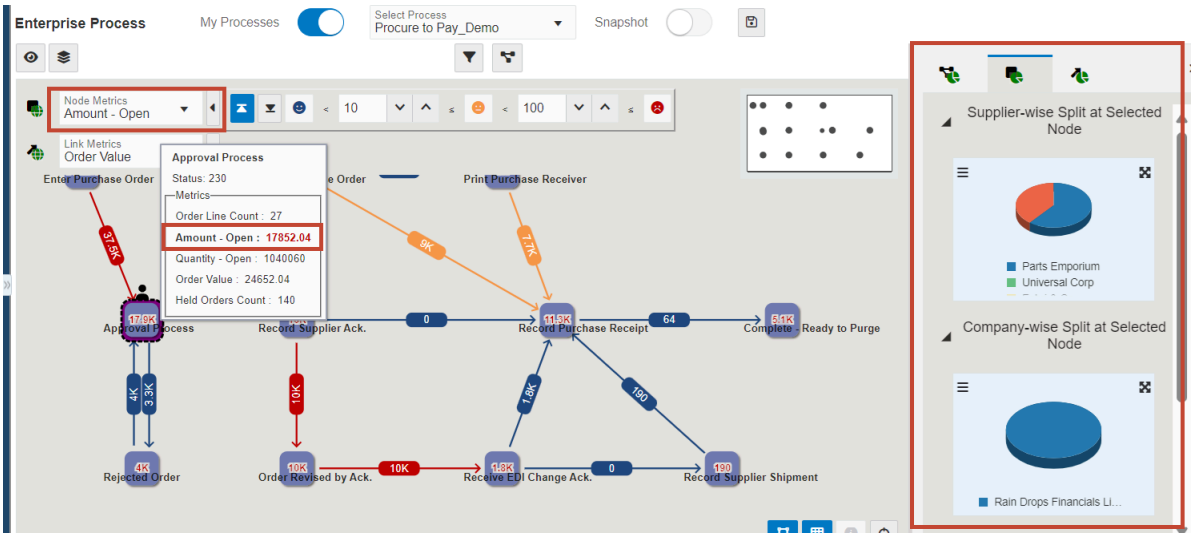
You can also make changes to the node and link metrics by using the Show Analytics options. See *Using the Show Analytics Option*.

1. Click the **Node Metrics** drop-down list (in the model pane) and select the required value.
2. To make changes to the threshold values of the nodes, click the **Expand Threshold Configurator** icon, and click the **Ascending** or **Descending** icons, or enter the values in the fields. You can determine the status of the nodes and links by their color codes.

   See *Understanding Color Codes*.
3. Hover or click the node to view the status code and metric details on the hover form. On the hover form, the field selected in the Node Metrics drop-down list is displayed in bold and its value is displayed in the threshold color.

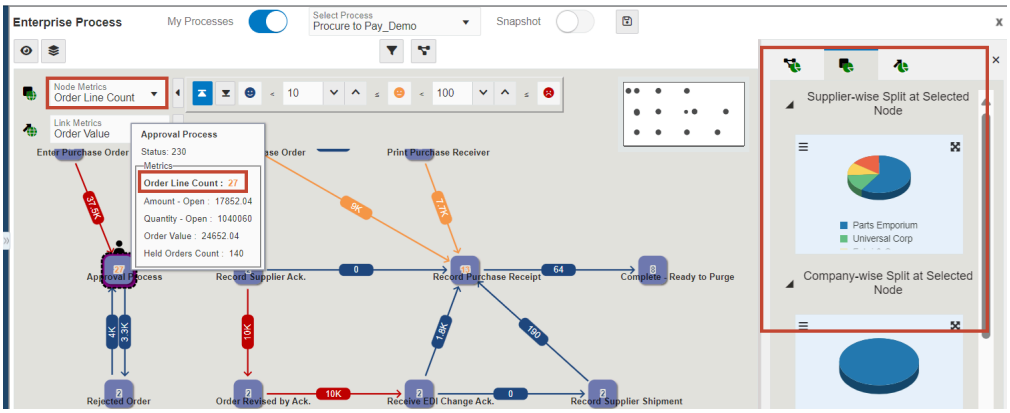
   In the following example, Order Value is selected from the Node Metrics drop-down list. On the hover form, the selected field is displayed in bold and its value (24.7K) is displayed in red on the node, and on the hover form. The value is displayed in red because it exceeds the threshold value. The corresponding metrics and details for Amount-Open are displayed on the Node Analytics tab on the right.

   > **Note:** When you click a node or link, the system displays a People icon and a border to indicate that the node is selected. The system displays a dashed border with a "marching ants" effect around the node when you hover over a selected node or link.



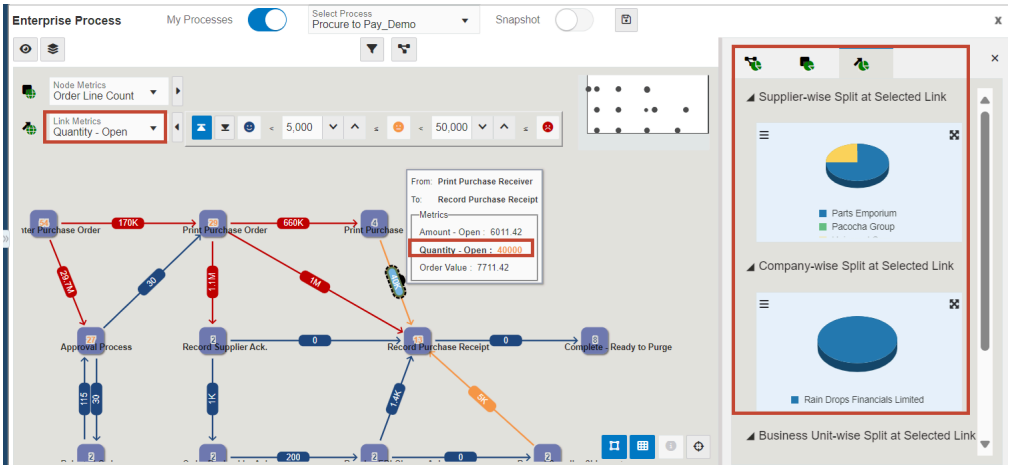
In the following example, Order Line Count is selected from the Node Metrics drop-down list. On the hover form, the name is displayed in bold, and its value (27) is displayed in orange because it is indicating the warning

status. The corresponding metrics and details for Order Line Count are displayed on the Node Analytics tab on the right.



4. Click the **Collapse Threshold Configurator** (arrow) icon to close the configurator window.
5. Similarly, to change and analyze the link metrics, click the **Link Metrics** drop-down list, and select the required value.
6. To make changes to the threshold values of the links, click the **Expand Threshold Configurator** (arrow) icon, and click the **Ascending** or **Descending** icons, or enter the values in the fields. You can determine the status of the nodes and links by their color codes.
7. Hover or click the link to view the From and To values, and the metric details of the link. On the hover form, the field selected in the Link Metrics drop-down list is displayed in bold and its value is displayed in the threshold color. The corresponding changes are displayed on the Link Analytics tab on the right.

   In the following example screenshot, Amount-Open is selected from the Link Metrics drop-down list. The field name is displayed in bold, and its value (40K) is displayed in orange on the link, and on the hover form. The value is displayed in Orange because it is in the warning status. The corresponding changes are displayed on the Link Analytics tab on the right.



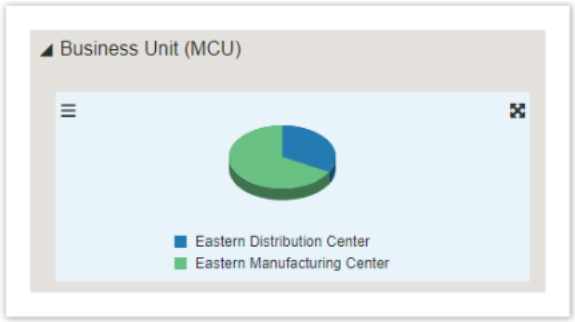
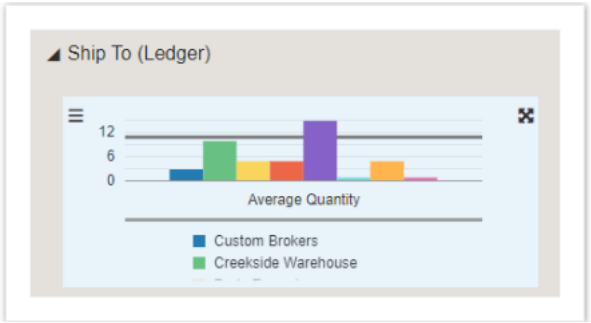
8. Click the **Collapse Threshold Configurator** (arrow) icon to close the configurator window.

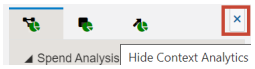
Using the Analytics Tabs

The following analytics tabs are displayed on the right side of the Enterprise Process window:

- **Process Analytics**: Displays the analytics charts for the enterprise process.
- **Node Analytics**: Displays the analytics charts for the selected node.
- **Link Analytics**: Displays the analytics charts for the selected link.

The Process Analytics tab displays the charts based on the design of the metrics in the template. The charts displayed in the Node Analytics and Link Analytics tabs are based on the aggregation operator types.

Aggregation Operator Type	Chart Type	Example
counter, sum, and distinct count	Pie chart	
avg, min, max	Bar chart, with a reference line to present the current context value.	

Note: You can hide and unhide the analytics tabs by using the Hide Context Analytics 

and Show Context Analytics

icons. You can click the arrow icons to collapse or expand the individual charts in the analytics tabs. Also, you can click the Maximize

or Minimize

icons on the charts to view them in maximized or minimized modes.

When you click a node, the Node Analytics tab is displayed along with the node-specific charts, and when you click a link, the Link Analytics tab is displayed along with the link-specific charts. The system displays the **Click to set the context to the process level** icon  when the Node Analytics or Link Analytics tabs are displayed on the right. Click this icon to view the Process Analytics tab.

Process Analytics Tab

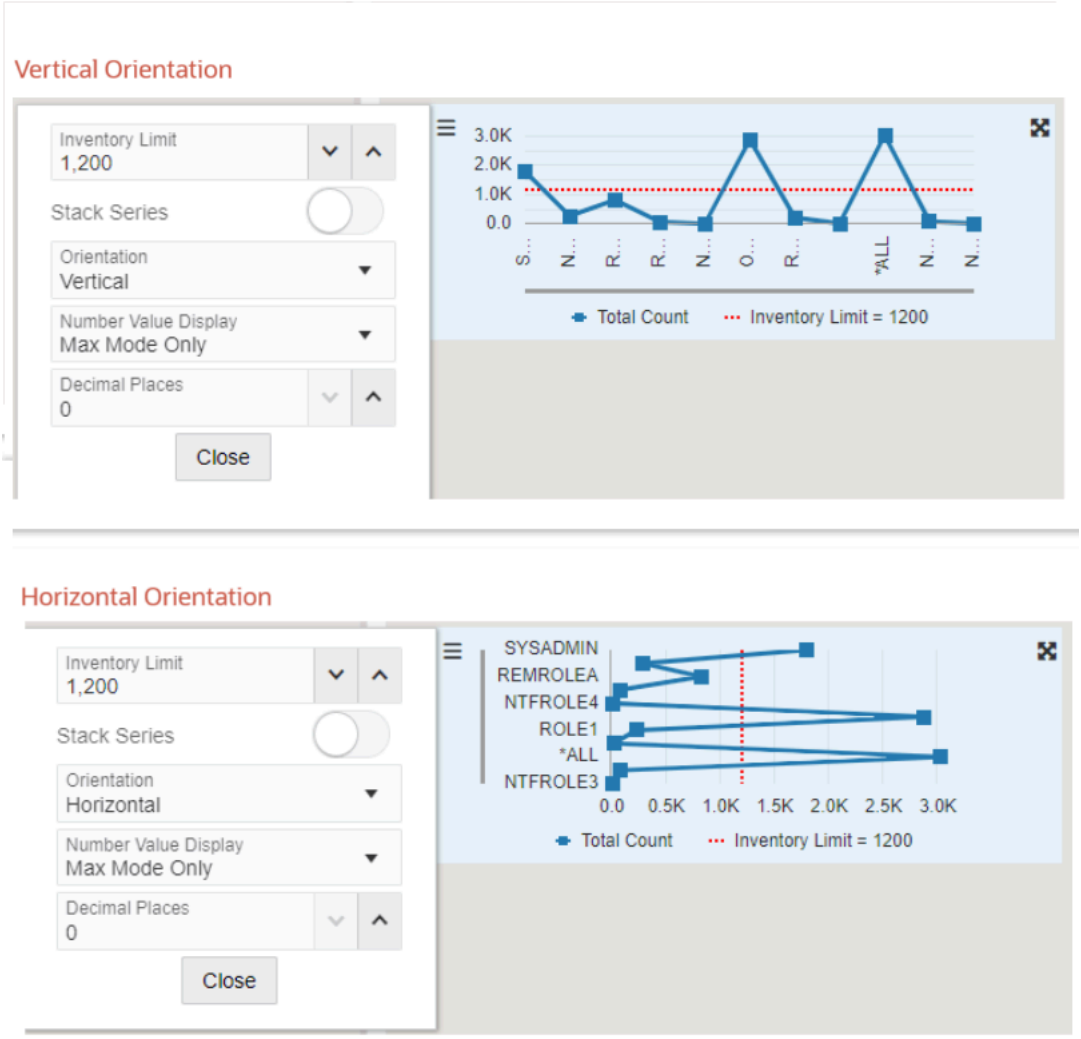
To make changes and analyze details on the Process Analytics tab:

1. On the chart, click the **Configure** icon

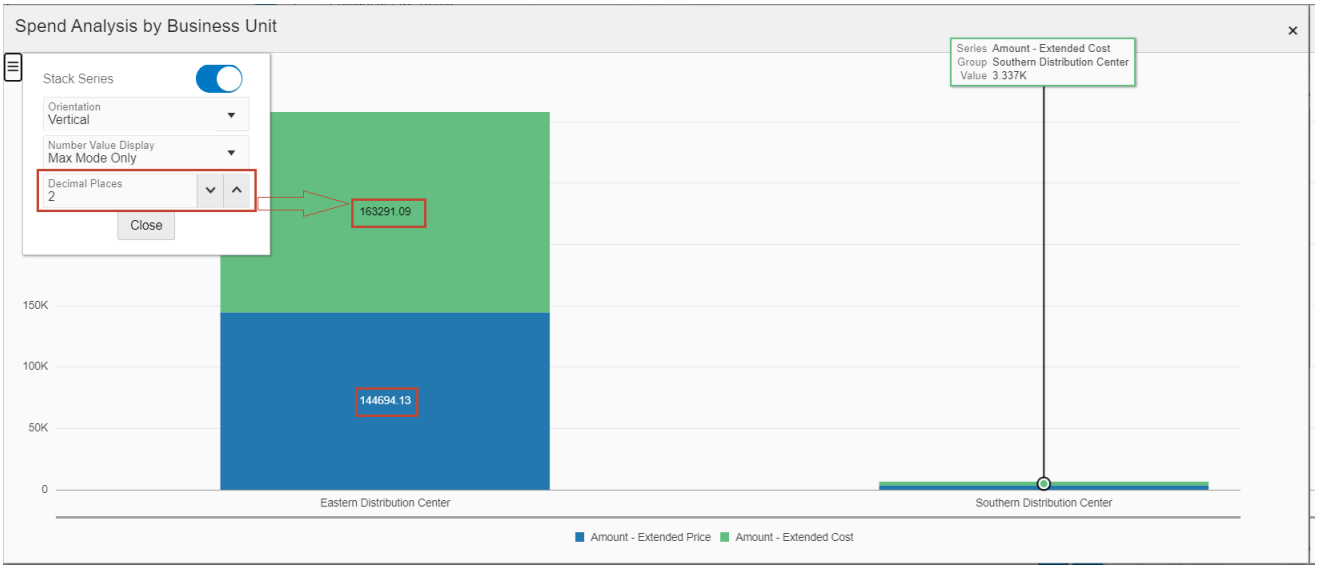
   and enable the **Stack Series** option if you want to extend the bar chart to compare the numeric values between levels of a categorical variable. If you enable this option for a pie chart, the system displays the data in a bar chart format.

2. For a bar chart, you can select the values from the **Orientation** (Vertical or Horizontal) drop-down list. (The pie chart does not have this option.)



3. In the Configure window of the Process Analytics tab, you can make changes to the metric related fields such as: Threshold Amount, Threshold limit, or Alert Limit. These fields are available if they are enabled during the design time.

4. To override the default value in the Decimal Places field, you can click the **Decrement** or **Increment** icons, or enter a value to set the required number of decimal places for the numbers on the charts.



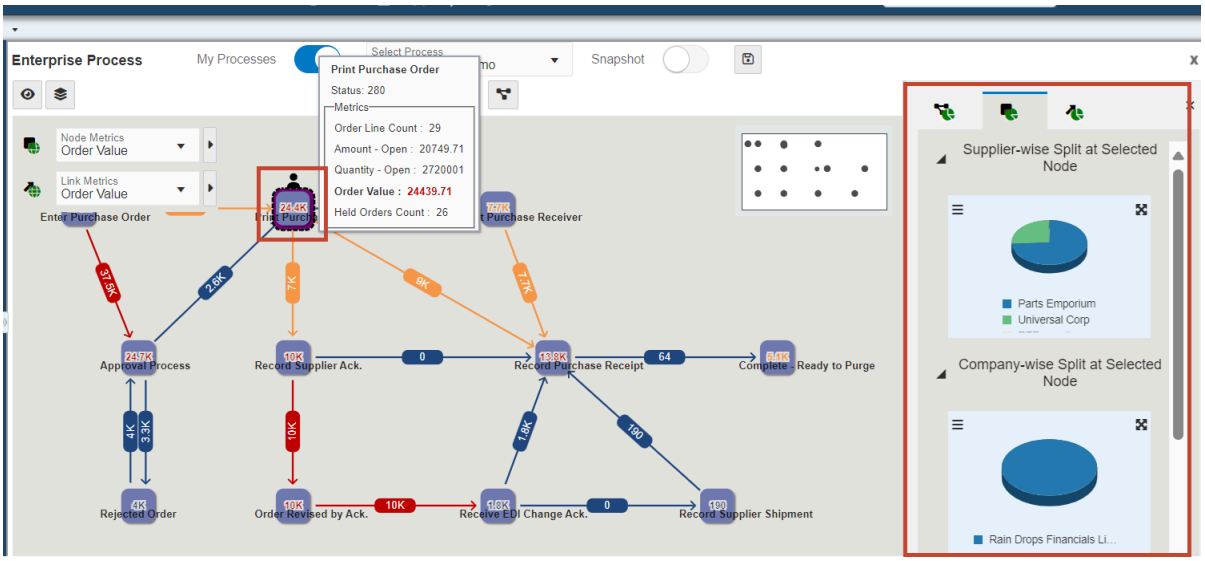
5. Click the Number Value drop-down list to override the default value (**Max Mode Only**: displays the numbers in the maximized mode but hides them in the embedded mode) and select **Never** or **Always**.
6. Click **Close** to close the Configure window.
7. Hover over the colors on the charts to analyze the details.

Node Analytics Tab

To make changes and analyze node-specific analytic details:

1. Click a node to view the node-specific analytics on the Node Analytics tab on the right.

> **Note:** The system displays a People icon and a border to indicate that the node is selected. The system displays a dashed border with a "marching ants" effect around the node when you hover over a selected node.



2. Click the **Configure** icon ☰ and enable the **Stack Series** option to view the charts in the stack chart format.
3. Select the values as required in the Configure window for the charts such as Number Value Display (Never, Always, or Max Mode Only) and Decimal Places (you can use the arrow icons in the field to increase or decrease the numbers).
4. Hover over the colors on the charts to analyze the details.

Link Analytics Tab

To make changes and analyze link-specific analytic details:

1. Click a link to view the link-specific analytics on the Link Analytics tab on the right.

> **Note:** The system displays a People icon and a border around the value of the link to indicate that the link is selected. The system displays a dashed border with a "marching ants" effect around the value on the link when you hover over a selected node.

2. Click the **Configure** icon ☰ and enable the **Stack Series** option to view the charts in the stack chart format.
3. Select the values as required in the Configure window for the charts such as Number Value Display (Never, Always, or Max Mode Only) and Decimal Places (you can use the arrow icons in the field to increase or decrease the numbers).
4. Hover over the colors on the charts to analyze the details.

Analyzing Snapshot

The Enterprise Process Modeler allows you to capture and save a snapshot of the current runtime enterprise process data, enabling you to review it later.

To save an enterprise process data as a snapshot:

1. In the Enterprise Process window, click **Save As Snapshot** .
2. In the Enter New Name window, enter a name, and click **OK**.

   The system displays the Snapshot option (enabled), Select Snapshot drop-down list, Save Snapshot, Save As Snapshot, Delete Snapshot, and the time stamp of the snapshot.

   You can click **Cancel** or **Close** to close the Enter New Name window.
3. You can make changes to the enterprise process snapshot and click **Save Snapshot** to save the changes. The time stamp of the snapshot will not change when you make changes and save a snapshot again.

   To save the snapshot with a new name, click the **Save As Snapshot** option, enter a new name, and click **OK**. The system saves the new snapshot with the original time stamp.

   > **Note:** You can make limited changes to the enterprise process snapshot. For example, changes to the fields in the Show Filter options and Show Analytics options windows are not supported. The system displays the "Disabled when a snapshot is opened." message when you attempt to make changes that are not supported.

4. To close the snapshot and view the current runtime enterprise process, disable the **Snapshot** option.

You can save multiple snapshots and all the saved snapshots are listed in the Select Snapshot drop-down list.

To view and analyze an existing snapshot, enable the **Snapshot** option in the Enterprise Process window. The system displays the first snapshot in the Select Snapshot drop-list automatically. From the **Select Snapshot** drop-down list, you can select the required snapshot.

You can delete a snapshot by clicking the **Delete Snapshot** icon.

Defining an Alternate Data Source

Configuring an alternate data source helps the Enterprise Process Modeler to calculate metrics from an alternate data source, thereby improving database performance.

The Alternate Data Sources application (P98611X) enables you to define a data source that is an alternate to a primary data source. For more information on how to configure an alternate data source, see, *Defining an Alternate Data Source*.