PeopleSoft

EnterpriseOne Solution Modeler 8.9 PeopleBook

September 2003

EnterpriseOne
Solution Modeler 8.9 PeopleBook
SKU REL9ESM0309

Table of Contents

Solution Modeler

Solution Modeler is a J.D. Edwards tool that enables you to create visual representations of your business, process, and workflow models. Solution Modeler contains icons that represent the tasks and transitions that you can use in a model. By dragging the icons onto a grid, you can create a diagram of a process from beginning to end. At any point during the design, you can right-click on an icon or transition in your diagram to access the appropriate.

Each step, or task, in your model can contain more specific tasks that relate directly to that particular point in the process. For example, your model might contain the task Enter Into Inventory. Within this task, you can list the steps that are necessary to enter a task into inventory. Solution Modeler is fully interactive with J.D. Edwards software. You can create and manage models that launch corresponding programs for each task of the model. This enables you to work directly in the program that your model represents. For example, if your model contains a Sales Order Entry task, you can link the task to the Sales Order Entry program (P4210) in J.D. Edwards software so that it launches from Solution Modeler. You can complete the required tasks in the program, and then return to Solution Modeler to review the next task in the model.

This documentation explains how to make Solution Modeler tasks interactive with J.D. Edwards software.

Understanding how Solution Modeler Interfaces with Solution Explorer

Solution Explorer is a convenient tool for accessing programs in J.D. Edwards software. It provides menus from which you choose the program that you want to launch. Solution Modeler and Solution Explorer are interactive.

Solution Modeler includes several hundred preconfigured models that contain tasks that link to J.D. Edwards software. In a Solution Modeler model, any task that is linked to a J.D. Edwards software program appears in the Task Master table (F9000), which is the J.D. Edwards task database table. Therefore, if you change the properties of one of these tasks using the Properties Context menu option in Solution Modeler, you do not need to update the J.D. Edwards tables for the change to appear in the Solution Explorer (the J.D. Edwards software interface) the next time that you retrieve the task information from the database. If you add a task to a model and want it to appear in a task view, you must assign the task a relationship (that is, a location in the task view). If the task view to which you assign the task is a role-based task view, you can assign one or more roles. Only those users with corresponding roles can see your task in that role-based task view. However, if you make a change to the Solution Modeler task name without using the Properties Context menu option, then the software does not automatically update the Task Master table with the change. To ensure that the J.D. Edwards database is updated with the data in Solution Modeler, you can use the Synchronize Names features in Solution Explorer.

Included in the Solution Modeler are several hundred preconfigured process models. Each task that is linked to a J.D. Edwards program appears in the End-User Tasks task view in the Solution Explorer. Therefore, if you change the properties of one of these tasks in the Solution Modeler, you change how the task functions in the Explorer. If you add a task to a process model and want it to appear in the End-User Tasks task view, you must assign the

task a relationship (that is, a location in the task view) and one or more roles. Only those users with corresponding roles can see your new task.

Model Types That Solution Modeler Supports

You can use Solution Modeler to create the following types of models.

Organization Model

An organization model is a hierarchical structure used to define groups of people. These groups of people, who are often referred to as nonsystem actors, include organizations, markets, and roles. You typically use an organization model to define the vertical reporting structure of an organization, such as an organizational chart that shows which employees report to which managers in a department. An organization model represents an organization at the highest level, or root, in the hierarchy. More specific groups within the organization are positioned below it. The lower in the hierarchy that a group appears, the more detailed it is.

Process Model

A process model represents a business process in terms of its component activities and the flow of work among the activities. Because the process crosses organizational boundaries, the process model depicts the organizations that perform the activities and the communication between the activities.

Workflow Process Model

A workflow process model represents a workflow in which employees perform a series of tasks until a final outcome is reached. A workflow commonly involves several different groups of people, each playing a different role in the workflow process. For example, a workflow process might represent the steps taken to approve someone for a credit card. Some steps might involve the following groups: phone representatives, group supervisors, and managers. After a phone representative verifies that caller's logistical information, she moves the request to her supervisor. While the request is with the supervisor, the phone representative can no longer access the request. If the supervisor approves the request and move it to her manager, neither she nor the phone representative can access the request.

Workflow models are not stored in the Solution Modeler repository. Instead, they are stored in the Process Task Associations table (F98830) in the J.D. Edwards software repository. Because workflow models are stored in a different repository, they do not appear in the Repository View or Model View panes in Solution Modeler. You can access a workflow model by navigating to the task with which it is associated.

Note

For more information about creating workflow process models, see *Creating a Workflow Process* in the *J.D. Edwards Workflow Tools Guide*.

Working with Business Processes

A business process model represents a business process in terms of its component activities, and the flow of work among the activities. Because the process crosses organizational boundaries, the process model depicts the organizations that perform the activities and the communication between the activities.

Business processes usually do not follow the same path each time that they are performed. To examine alternatives, you can create process scenarios that you use to compare different paths through a process. A scenario is all or a portion of a process model that defines a particular way in which the business executes the process.

J.D. Edwards provides several hundred predefined business processes and scenarios that represent suggested solutions for specific business process needs. You can select from these scenarios or modify them to define new ones.

To launch the Solution Modeler, from Solution Explorer, choose Solution Modeler and then choose Run from the Tools menu.

► To view J.D. Edwards business processes

Launch the Solution Modeler and ensure that the J.D. Edwards Business Process Models repository is open.

1. Expand the repository in the Repository View window, and then double-click one of the notebooks that appears underneath the repository.

   You might need to provide a user ID and password, depending on how the repository is configured.

2. Expand the Process Modeler object in the Model View window.
3. Double-click the J.D. Edwards Business Process Models object.

   The Business Process Model appears in the main window of the Modeler. This model is divided into the following categories:

   - Procure to Pay
   - Order to Cash
   - Consumption to Reorder
   - Concept to Opportunity
   - Demand to Available
   - Manage the Business
   - Manage Materials
   - Design to Market
   - Lead to Order
   - Campaign to Lead
4. Access more discrete process models by clicking the down-arrow button on a task and choosing Process Modeler.

The system opens a new view each time you access a new file. Each view has its own tab at the bottom of the form, and you can alternate between views by clicking their tabs. To close a view, click a tab and then click the bottommost close button (the X) in the upper right corner of the form. Do not click the uppermost close button, or you will exit the Solution Modeler.

Working with Scenarios

Scenarios are variations of a business process model. In the base model, all of the tasks are considered to be active. In a scenario, you can disable or add extra tasks. Active (recruited) tasks appear in color in the scenario, while disabled (not recruited) tasks might appear in gray or might be hidden, based on how the scenario is configured.

You use the Scenario toolbar to create, review, and modify scenarios. Click the Scenario button on the Object Tools toolbar to activate the Scenario toolbar. This activation applies only to the current business process. If you have multiple business process views available and you switch to a different view, you must activate the Scenario toolbar again to make it available in the view.

To select a scenario of the current business process, choose it from the drop-down list on the Scenario toolbar. After you select a scenario, it becomes the default parent process in each subprocess that you define for it.

Note

To properly link a scenario of a subprocess to its parent scenario, both the parent and child scenarios must have the same name. For example, you might have a base process named Enter Work Order that includes a number of subprocesses, including one called Create Work Order Header. If you create a scenario of the parent called Enter Work Order v1, and then went to the Create Work Order Header subprocess and created a scenario of that subprocess, you must name that scenario Enter Work Order v1, as well.

J.D. Edwards provides a placeholder for a scenario and recommends that you create your own scenarios using existing base models as a reference. You can also use the cloning feature to create multiple scenarios. After cloning a scenario, you can modify the clone without affecting the base scenario. The most common reasons for modifying a scenario are as follows:

- To change the tasks or flow that are included in the scenario
- To change the names of the tasks that apply to a specific scenario
- To change the program version that is assigned to a task in a specific scenario

See Also

- *Working with Modeler Tasks* in the *Solution Modeler Guide*

► To clone a scenario

1. Open the scenario that you want to clone.
2. Click Maintain on the Scenario toolbar.
3. On Scenario Maintenance, click the scenario you want to clone, and then click Clone.

The system adds a new scenario with the same name as the one you are cloning, and places an asterisk (*) at the end of the name.

4. Ensure the new scenario is highlighted, and then click Modify.
5. On Scenario Detail, complete the following fields:
   - Name
   - Desc
6. Choose one of the following options:
   - Hide non-members

     Choose this option to prevent not recruited tasks from being displayed in the scenario.

   - Ghost non-members

     Choose this option to display not recruited tasks in gray in the scenario.
7. Click OK.
8. On Scenario Maintenance, click OK.

► To change included tasks and flow

1. From the drop-down field located above the Solution Modeler work area, choose the scenario you want to open.
2. Open the scenario you want to change.
3. Use the standard Modeler tools to add tasks and change the flow among the tasks.
4. To change the recruitment status of a task, click Recruitment on the Scenario toolbar.

   The Scenario Recruitment dialog box appears.
5. Click tasks to toggle their status between recruited and not recruited, and then click OK on Scenario Recruitment.

Working with Modeler Tasks

You can add Solution Explorer task functionality to any Solution Modeler task. Additionally, you can define and modify J.D. Edwards software scenarios for each Modeler task.

Associating Modeler and Solution Explorer Tasks

After creating a Modeler task, you then create a Solution Explorer task to associate with it. You create Solution Explorer tasks while you are in the Solution Modeler. Once the Solution Explorer task is associated with the Modeler task, you can interact with the Modeler task in many of the same ways you can with tasks in Solution Explorer task views. For example, you can prompt for values or versions, or execute the application of the task if it is a software task.

Accessing the Interoperability Menu

All task association in the Solution Modeler is performed through the interoperability menu. To perform any of the tasks in this section, you must first complete the following steps to display the interoperability menu.

► To access the interoperability menu

From Solution Explorer, choose Solution Modeler from the Tools menu and then choose Run.

Solution Modeler opens in a new window.

1. Open a process model or create a new one.
2. Right-click the Modeler task you want to work with, and then choose J.D. Edwards ERP/SCM.

Assigning Properties to a Task

You can associate an Explorer task with a Modeler task. Then, you can launch the Explorer task from the Modeler task by right-clicking the task and then choosing Idea To Action from the interoperability menu.

► To assign properties to a task

1. Right-click the Modeler task to which you want to assign properties.
2. Choose J.D. Edwards ERP/SCM, and then choose Properties.

   The system confirms that you want to create a task.
3. Click Yes.
4. On Task Revisions, create an Explorer task to associate with the Modeler task.

Note
Keep in mind that the system does not automatically assign roles or task view relationships, so you must assign them yourself, as described in the referenced task.

5. Click OK.

Modifying Task Properties

After you have associated an Explorer task with a Modeler task, you can change the properties of the task from the Modeler.

► To modify task properties

1. Right-click a Modeler task with the associated Explorer task that you want to modify.
2. Choose J.D. Edwards ERP/SCM, and then choose Properties.
3. On Task Revisions, change the properties that you want, and then click OK.

Launching an Associated Task

After you have associated an Explorer task with a Modeler task, you can launch the action defined by the associated task from the Modeler.

► To launch an associated task

1. Right-click a Modeler task with the associated Explorer task that you want to launch.
2. Choose J.D. Edwards ERP/SCM, and then choose Run.

   The system launches the associated task.

Linking to an Explorer Task

Just as you can with Explorer tasks, you can create a link from a Modeler task to an Explorer task.

Note

For more information about linking tasks (including linking to task variants), see *Working with Task Links* in the *Solution Explorer Guide*.

► To link to an Explorer task

1. Right-click a Modeler task with the associated Explorer task to which you want to add a link.

   You can also create a link when you first create a new Explorer task.

2. Choose J.D. Edwards ERP/SCM, and then choose Properties.

3. On Task Revisions, from the Form menu, choose Link To.
4. On the Link To form, click the Find Relationship button.
5. On the Find Relationship form, complete the following fields, and then click Find:
   - Task View

     Click the visual assist to bring up the Task View Search & Select form.

   - Parent Task ID

     Enter the parent of the task you want to set as the link target. Click the visual assist to bring up the Task Search & Select form.

   The Find Relationship form lists all of the child tasks of the parent you searched on.
6. Choose the task you want to set as the link target, and then click Select.

   The link target is the task that will appear in the second window when the user invokes the link. The system uses the information you provided to complete the required fields in the Link To form.
7. Click OK.
8. On Task Relationship Revisions, click OK.

Executing a Link

After you have created a link from a Modeler task to an Explorer task, you can execute the link.

► To execute a link

1. Right-click the Modeler task with the link that you want to execute.
2. Choose J.D. Edwards ERP/SCM, and then choose Run.

   The system switches to the Solution Explorer and displays the linked task in a second window.

Setting Processing Options for a Task

After you have associated an Explorer task with a Modeler task, you can set its processing options, when applicable, from the Modeler.

► To set processing options for a task

1. Right-click the Modeler task with an associated Explorer task for which you want to set processing options.
2. Choose J.D. Edwards ERP/SCM, and then choose Prompt for Values.
3. On Processing Options, set the processing options values as desired, and then click OK.

Choosing a Version of a Task to Execute

After you have associated an Explorer task with a Modeler task, you can choose which version of its associated application to execute.

► To choose a version of a task to execute

1. Right-click the Modeler task with an associated Explorer task that you want to choose a version to execute.
2. Choose J.D. Edwards ERP/SCM, and then choose Prompt for Version.
3. On Work with Versions, choose the version you want to execute, and then click Select.

Overriding a Task in a Scenario

In some instances, you might want to maintain a task's place in a scenario but alter some aspect of it, such as its name or the version of the program that it opens. For example, you might have two offices that use identical processes to enter a new employee record, but they use different versions of the form for entering basic compensation information. You can use the same process model for both offices, and then create a scenario with a task override to launch a different form for the second office.

► To override a task in a scenario

1. From the drop-down field located above the Solution Modeler work area, choose the scenario you want to open.
2. Double-click the task that you want to override.
3. On Task, click the OneWorld tab.
4. Click Override.
5. Perform one of the following:
   - Choose a task from Select Override Task.

     Override tasks are available only if the base business process model has multiple scenarios in which overrides already exist for the current task.

   - Enter a name in Create New Override Task, and then click Add.
6. Click OK.
7. Right-click the task, and then choose J.D. Edwards ERP/SCM and choose Properties.

   If you created a new task, the system confirms its creation.

8. On Task Revisions, create or modify an Explorer task to associate with the Modeler task.

Note
See *Creating a Task* in the *Solution Explorer Guide* for instructions on creating an Explorer task. The system does not automatically assign roles or task view relationships, so you must assign them when you create a task.

9. Click OK.

Synchronizing Task Names

When you use the Synchronize Names feature, Solution Explorer retrieves from Solution Modeler a list of the task IDs and task names that are associated with J.D. Edwards tasks. Solution Explorer updates the F9000 table in the J.D. Edwards database so that Solution Explorer displays the updated task names the next time task information is retrieved from the database. Information is retrieved from the database when you log in to J.D. Edwards software or when you change task views.

► To synchronize task names

From the Tools menu, choose Solution Modeler and then choose Synchronize Names.

Synchronizing Task Statuses between Solution Modeler and J.D. Edwards Software

When you synchronize task statuses, Solution Explorer retrieves from Solution Modeler task IDs and task statuses that are associated with tasks in J.D. Edwards software. Synchronizing tasks updates the active or inactive option of the task in the Task Master table (F9000) in the J.D. Edwards software. The active or inactive option of a task determines whether a task is visible in any task view. When a task is set to inactive, it does not appear in any task view. When a task is set to active, it appears in any task view in which a task relationship has been defined for it and it has not been filtered out by a mechanism such as FineCut. In a role-based task view, the tasks that you see in Solution Explorer depend upon the role that you are assigned and the role or roles that are assigned to the tasks.

See Also

- *Task View Setup* in the *Solution Explorer Guide*

► To synchronize a task status

From the Tools menu, choose Solution Modeler and then choose Synchronize Tasks.

Repository Information

The Solution Modeler repository contains all organization and process models. You can store models on your local repository or on a server-based repository. You can check out models from the server-based repository each time you edit them, and then check them back in when you are finished. While a model is checked out to you, other users will receive a notification when they try to check out the same model. You will also receive a notification about changes other users have made to the model. For example, you and another user have the same model checked out and you are both working on the same task. The other user checks in the model before you do. When you check in the model, Solution Modeler will notify you that changes were already made to the task and will ask you if you want to override them. However, suppose you and another user have the same model checked out but you are working on different tasks. The other user checks in the model before you. When you check in the model, Solution Modeler will retain the changes the first user made while adding your changes to the model as well.

The check in/check out functionality ensures that the changes you make are not overwritten by someone working on the same model by providing notifications to users trying to check out a model that is already checked out to someone else.

Workflow models are not stored in the Solution Modeler repository. Instead, they are stored in the Process Task Associations table (F98830) in the J.D. Edwards software repository. Because workflow models are stored in a different repository, they do not display in the Repository View or Model View panes in Solution Modeler. You can access a workflow model by double-clicking the task with which it is associated.

Solution Modeler enables you to retrieve models from any repository to which you have access.

Checking Models In and Out of the Repository

To edit a model, you must check it out of the repository. When a model is checked out to you, no other user can access the model. This measure ensures that someone working on the same model does not overwrite your changes. You save your changes by checking the model back into the repository.

► To check out models from a repository

1. From the Repository menu, choose Check Out, and then choose the repository from which you want to check out.
2. On Check Out Wizard – Step 1, choose one of the following options:
   - From the currently open notebook

     Choose this option if you want to check out a model that resides in the notebook you currently have open.

   - From a ProVision objects (.pvw) file

     Choose this option if you want to check out a model that resides in an existing .pvw file. If you choose this object, type the pathname or browse to the .pvw file you want to use.

- From a connected ProVision Repository

  Choose this option if you want to check out a model that resides in a different repository than the one with which you are currently connected. If you choose this option, choose the repository from the Repository drop-down field.

3. Click Next.
4. On Check Out Wizard – Step 2 of 5, complete the following options:
   - All models in the notebook

     Choose this option you want to check out all of the models in the notebook you chose in step 2.

   - The following models

     Choose this option if you want to check out models from the list that appears on screen. If you choose this option, choose the models you want to check out.

   - Include nested models in selection
   - Include model scenarios in selection
   - Check out objects as read-only
5. Click Next.

   If you chose to check out a model that can be viewed under more that one context, a screen displays asking you if you want to view the model under a specific context. If you choose Yes and then click Next, a wizard is launched and you must choose the following:

   1. The model that contains the context you want to view
   2. The instance you want to use as the context
6. On Check Out Wizard – Step 3 of 5, complete the following fields and options:
   - Type an optional description of the object, if you desire to do so.
   - Check the object out under the name

     Type your computer name, if you desire to.

   - Check the objects out anonymously
7. Click Next.
8. On Check Out Wizard – Step 4 of 5, choose the appropriate options listed below:
   - To the currently open notebook

     Choose this option if you want the models you checked out to reside in the notebook currently open.

   - To a ProVision objects (.pvw) file

     Choose this option if you want the models you checked out to reside in the notebook currently open.

   - To a connected ProVision repository

- Choose this option if you want the models you checked out to reside in a repository. If you choose this option, then you must choose a repository in the Repository drop-down menu.
- Create Notebook

  Choose this option if you want the models you checked out to reside in a newly created notebook. If you choose this option, type in the name you want to call the notebook you are creating.

9. Click Next.
10. On Check Out Wizard – Step 5 of 5, click Finish.

    Solution Modeler checks out the model to you.

Managing Disk Space and Backups

While working in a repository, you should back up your work often. By default, Solution Modeler automatically saves a new backup each time that you close the repository. Solution Modeler saves the five latest backups; this *rolling backup* method is useful for working repositories. Static repositories, such as the OneWorld Business Process Model repository, do not require multiple backups. Because each backup requires an equal amount of disk space, you should change the number of backups of static directories that the system saves. Solution Modeler allows you to set the number of backups for each repository in the application.

Changing the Number of Rolling Backups

Use this procedure to change the number of rolling backups that the system saves for a specific repository. You can also disable the automatic backup option.

► To change the number of rolling backups

1. From the Repository menu, choose Detail.
2. On Repository Details, click the Options tab.

   Note
   See *Accessing Repository Information* in the *Solution Modeler Guide* for instructions about accessing the Repository Details form.

3. Enter the number of automatic backups that you want to retain.

   You can enter any number of automatic backups. The default value is 5. Remember that each backup takes the same amount of disk space and, unless you are managing a working repository, the file size of each subsequent backup will increase over time. This growth occurs because of the way in which the underlying database is set up.

   To manage the growth of backup files, periodically turn on the following option:

   - Compact database

4. If you do not want the system to perform automatic backups, turn on the following option:

   - Automatically back up this repository whenever it is closed

Managing Backups

In addition to using the automatic backup feature in Solution Modeler, you can create backups manually. After backups exist, you can restore data from them. You can rename backups to better manage them, and you can delete backups that you no longer need.

► To create a manual backup

1. From the Repository menu, choose Detail.
2. On Repository Details, click the Backups tab, and then click the Back up button.
3. On the Create Backup window, enter a name for the backup file, and then click Backup.

   The system creates a backup of the open repository.

► To rename a backup

1. From the Repository menu, choose Detail.
2. On Repository Details, click the Backups tab, and then choose a backup file.
3. Click Details.
4. On Backup Details, enter a new name for the backup, and then click OK.

► To restore a backup

1. From the Repository menu, choose Detail.
2. On Repository Details, click the Backups tab, and then choose a backup file.
3. Click Restore.

   The system confirms that you want to overwrite your existing repository.

4. Click Yes to overwrite your repository with the backup.

► To delete a backup

1. On Repository Details, click the Backups tab, and then choose a backup file.
2. Click Delete.

   The system confirms that you want to delete the backup.

3. Click Yes to accept the deletion.