

JD Edwards EnterpriseOne Tools

Enterprise Process Modeler Guide

1.0



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Preface

Welcome to the JD Edwards EnterpriseOne documentation.

Documentation Accessibility

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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. |
| <i>Italics</i> | 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 and 9.2.9.3.

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.

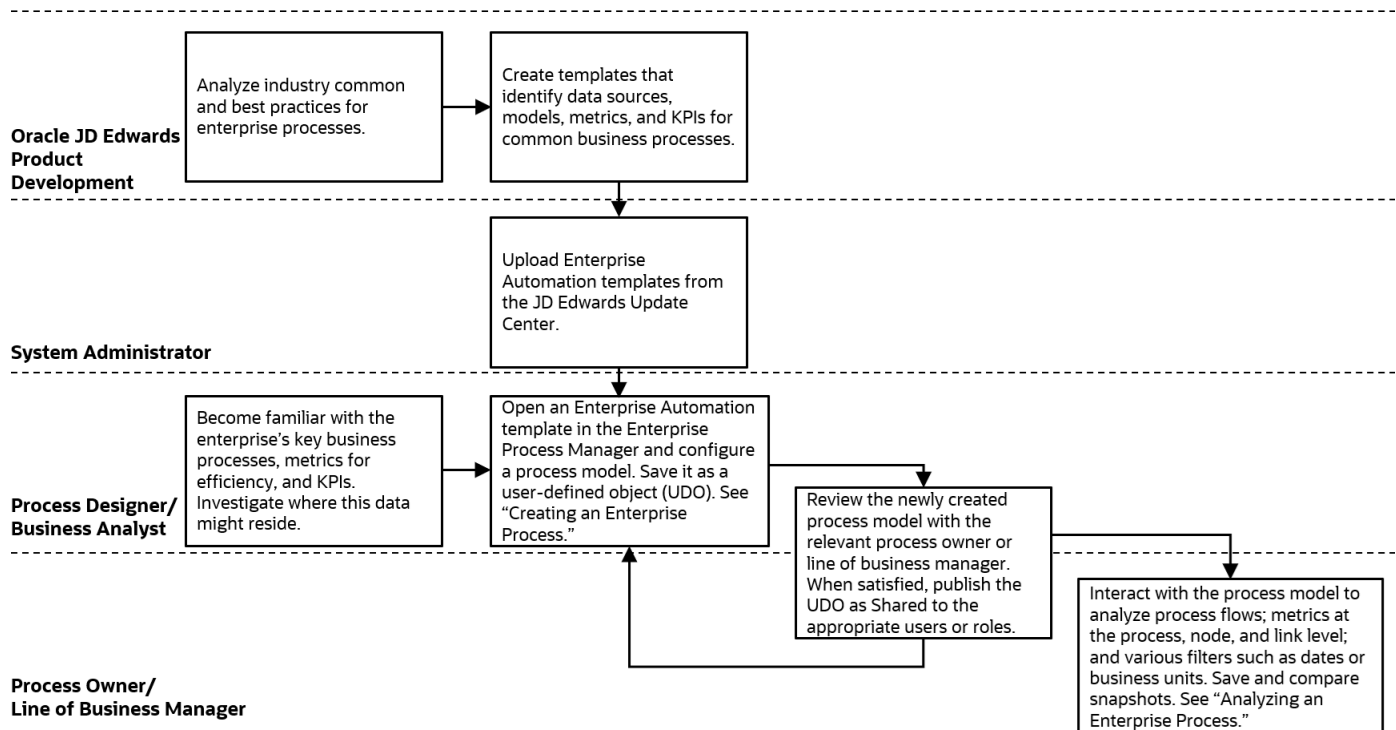
Benefits

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



























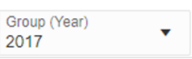




2 Understanding the Enterprise Process Modeler User Interface

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 |
|  | (Tools Release 9.2.9.3) Show Metric Selectors | Icon |
|  | (Tools Release 9.2.9.3) Hide Window | Icon |
|  | (Tools Release 9.2.9.3) Show Mini Map | Icon |
|  | (Tools Release 9.2.9.3) Show Hierarchy Window | Icon |

Understanding Color Codes

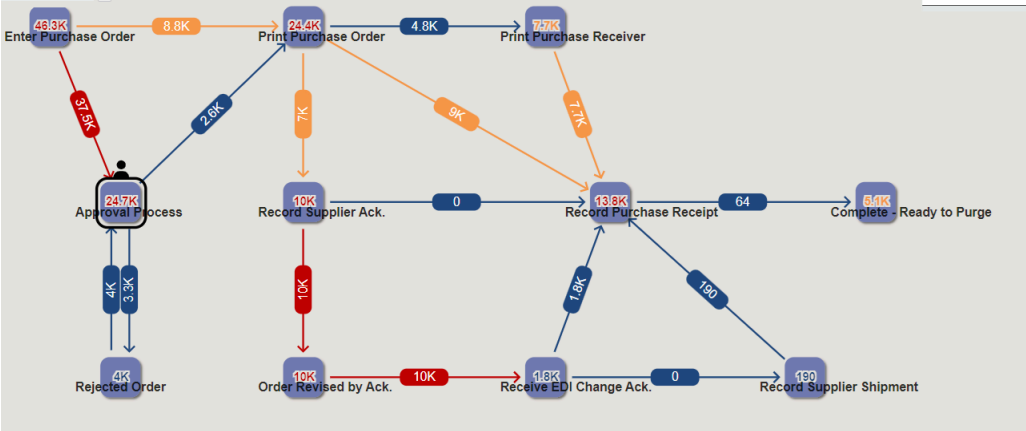
You can determine the status of the nodes and links by their color codes.

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 |  |

| Colors | Status | Icons displayed in Node Metrics and Link Metrics Options |
|--------|--------|--|
| | | |

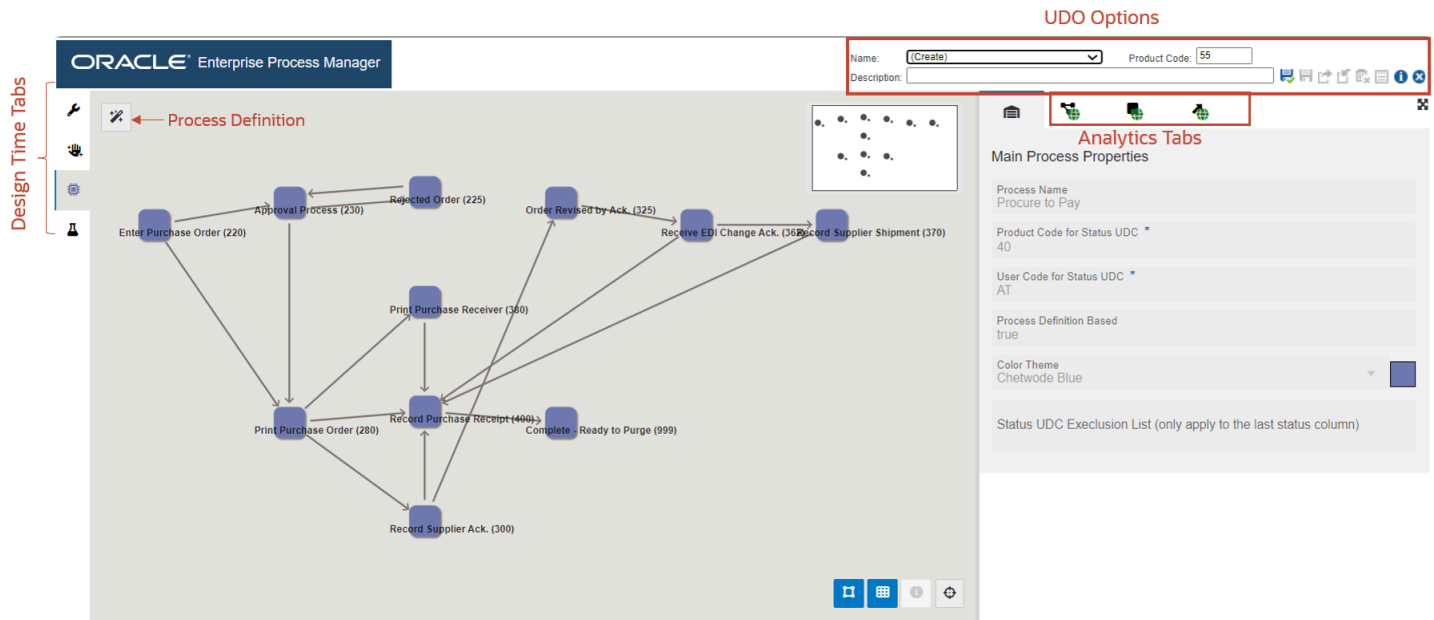
This example screenshot displays nodes, links, and their values in different colors to indicate the normal, warning, and critical statuses.



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.



(Tools Release 9.2.9.3) You may see a loop around the node as shown in the following screenshot. The system displays a loop around the node in the design mode if an activity rule involves a self-referential loop (for example, transitioning from the 400 status back to the 400 status within the activity rules).




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

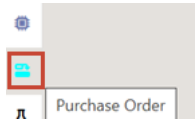
Design Time Tabs


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 selected color theme and name of the template is displayed on this tab)  : Displays the automatically generated process model diagram.

(Tools Release 9.2.9.3) If the template contains a connected template, the child Process Model tab is displayed below the parent Process Model tab. The selected color theme and name of the template are displayed on the child process tab.



- **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.

(Tools Release 9.2.9.3) You may see a self-referential loop around the node. In the Preview tab, the self-referential loop displays the appropriate metric values depending on the options defined in the Show Display Options and Show Filter Options windows.

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

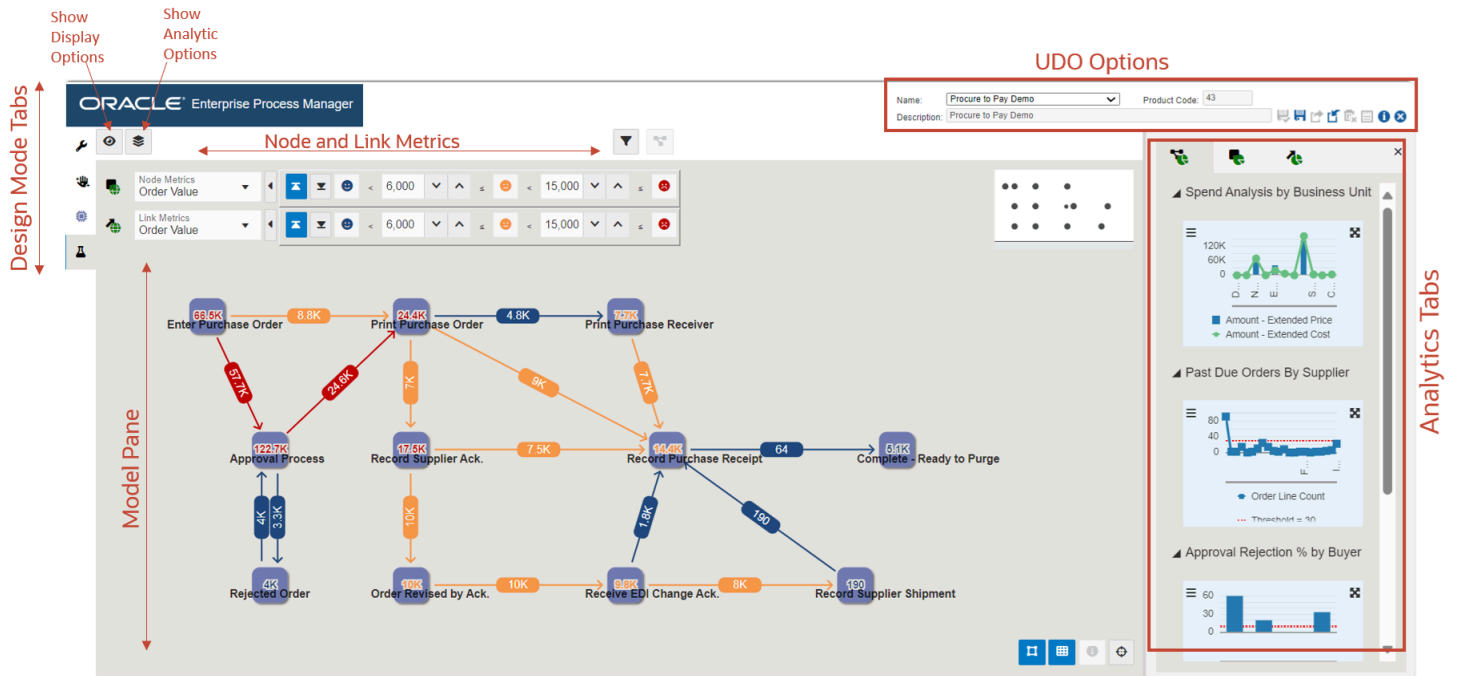


When you click this icon, the system displays a top pane (on top of the model pane) with filter options. You can click the Hide Filter Options (X) icon to close this pane.

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

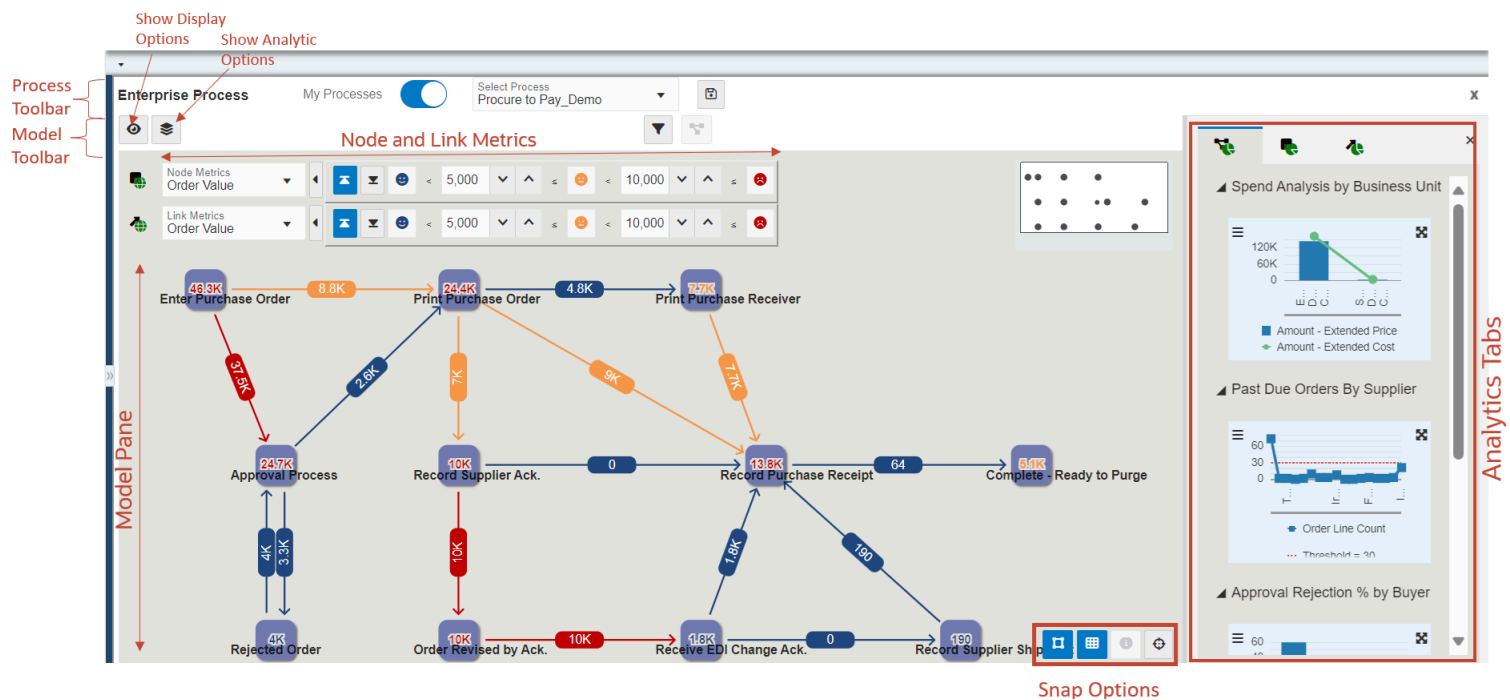
The system displays the following UDO options at the top of the window: Save, Save As, Request to Publish, Reserve, Delete, and Notes.

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](#).



The model pane displays a mini map of the process diagram in the right upper corner, indicating the nodes' positions. (Tools Release 9.2.9.3) You can hide or unhide this map using the Hide Mini Map and Show Mini Map icons.



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** 

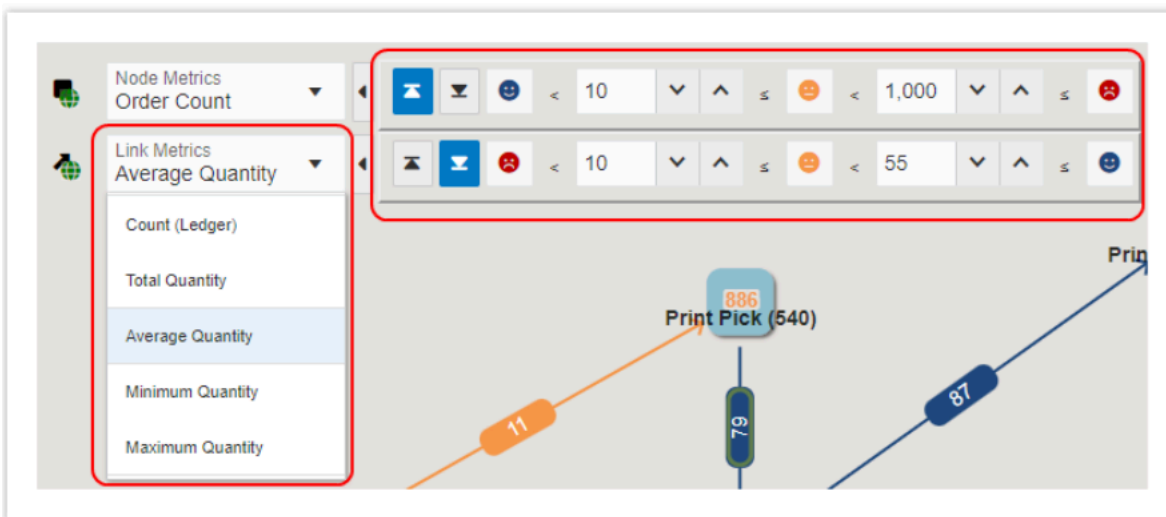
When you click this icon, the system displays a left pane with display options. You can click the Hide View Options (X) icon to close this pane.
- **Show Analytics Options** 

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.




Note: Starting with Tools Release 9.2.9.3, the label on the node displays a semi-transparent background to enhance









readability.

Starting with Tools Release 9.2.9.3, if a template includes a connected template, you can preview both the parent and the child processes. In this case, the system displays the Hierarchy Map window showing the hierarchy between the processes.

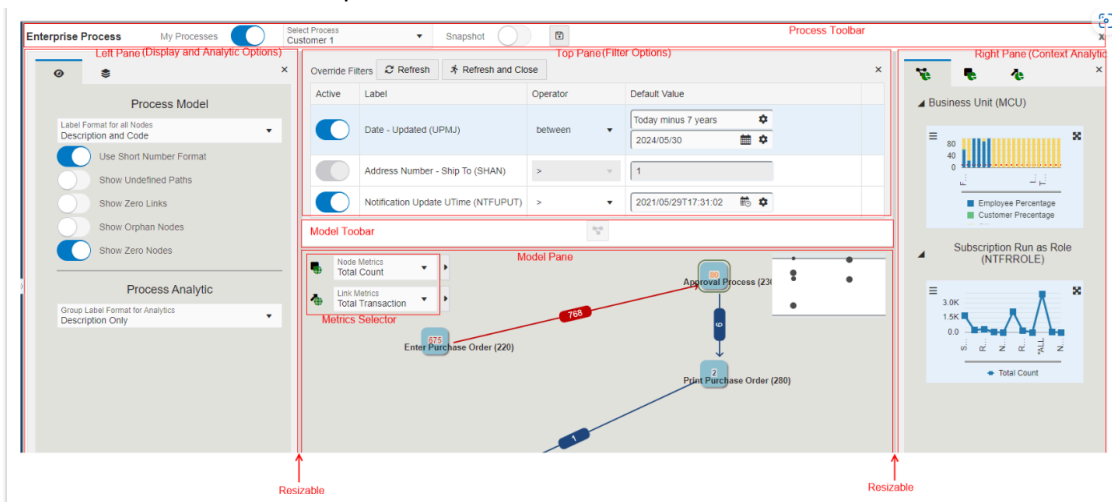
(Tools Release 9.2.9.3) The system displays a loop around the node in the design mode if an activity rule involves a self-referential loop (for example, transitioning from the 400 status back to the 400 status within the activity rules). In the Preview tab, the self-referential loop displays the appropriate metric values depending on the options defined in the Show Display Options and Show Filter Options windows.

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 *User Defined Object (UDO) Features in Enterprise Process Manager*.

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 are:
 - JDE TMPL Procure to Pay (Tools Release 9.2.9). See *Enterprise Process Modeler for Procure to Pay*.
 - JDE TMPL Order to Cash (Tools Release 9.2.9). See *Enterprise Process Modeler for Order to Cash*.
 - JDE TMPL Requisition (Tools Release 9.2.9.3). See *Enterprise Process Modeler for Requisition*.
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 Labels or accept the default values.

Note: If you are on Tools Release 9.2.9.3, refer to the next step (step 6) to understand how to make the design time changes in the Create Process window.

- **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. (Tools Release 9.2.9.3) You can either enter the design time values for these Labels or accept the default values. The Labels are displayed depending on the template you select.
 - a. Click the **Configure** icon in the Label fields. The User ID option is selected by default.
 - Click **OK** to replace the default value with your user ID during runtime.

- Click **Cancel** to close the window and use the default value.
- Click **Reset to Simple** to delete the default value and enter a new value as required.
- b. The Create Process window also enables you to choose a color theme for the nodes.
 - If the selected template does not contain any connected templates, select the color from the **Color Theme** drop-down list and select the node from the **Start Status** drop-down list.
 - If the selected template contains connected templates, the Create Process window provides the option to disable the connected templates. This option is enabled by default.

In the parent template row, select the color from the **Color Theme** drop-down list and select the node from the **Start Status** drop-down list.

In the child template row, you can disable the option to remove the connected template. When the option is enabled, you can select the color from the **Color Theme** drop-down list and select the node from the **Entry Status** and **Start Status** drop-down lists.

The Entry Status node determines the node from where the connected process starts from the parent process. The node you select in the Start Status field becomes the first (start) node in the child process.

In the following example, the Purchase Order child process is enabled for the Requisition parent process.

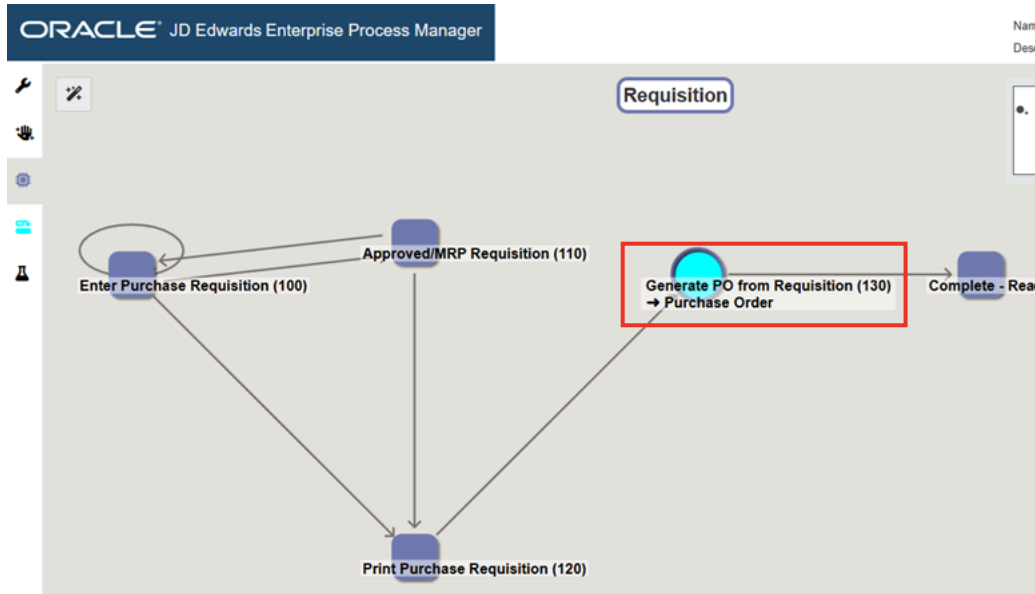
| Create Process | | | |
|--|-------------|------------------------------------|----------------------------------|
| Label | | | Default Value |
| Order Type (DCTO) | | | OR |
| Line Type (LNTY) | | | S |
| Purchase Order Type | | | OP |
| Process Title | Color Theme | Entry Status | Start Status |
| Requisition | Chetwod... | | Enter Purchase Requisition (100) |
| <input checked="" type="checkbox"/> Purchase Order | Cyan | Generate PO from Requisition (130) | Enter Purchase Order (220) |

7. 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.

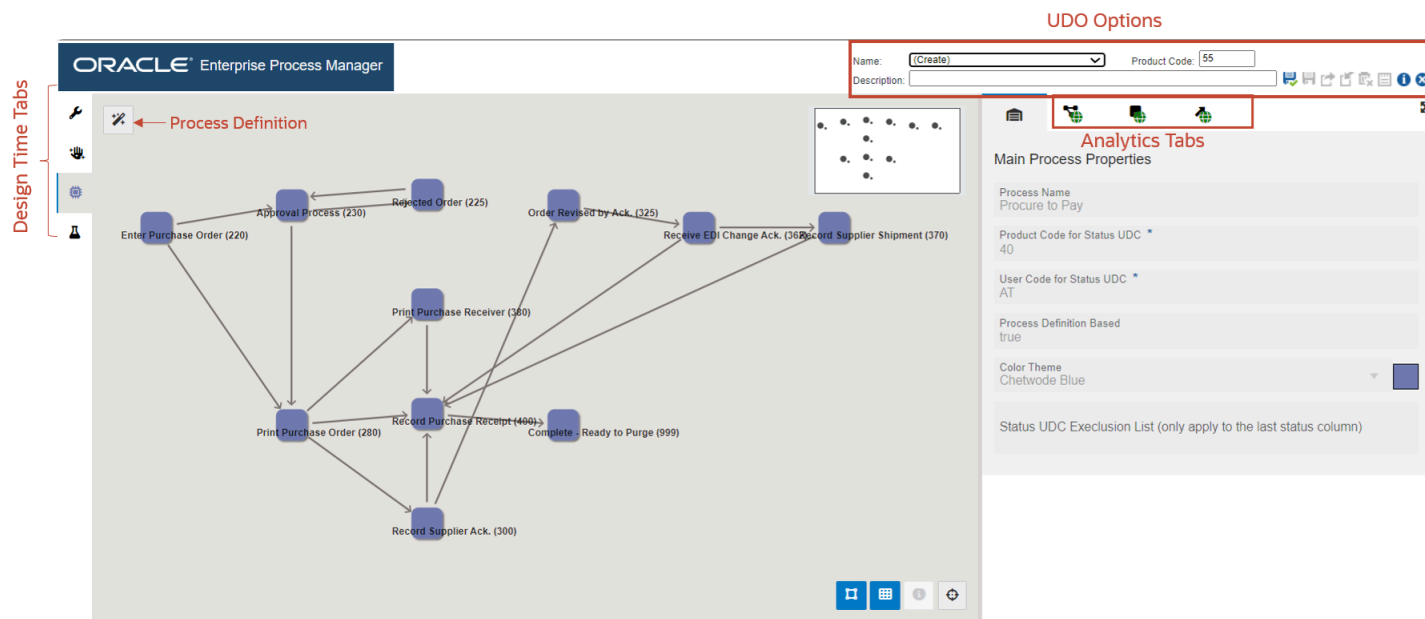
The nodes represent the tasks in the process template and the links represent the connection between the nodes.

Starting with Tools Release 9.2.9.3, to indicate that a child template is linked to a node, the Enterprise Process Manager shows a circular node in the specified color scheme. In the following example, the name (Requisition) of the parent template is displayed on the generated process diagram. The

child template is linked from the Generate PO from Requisition node (indicated by the Cyan color).






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.




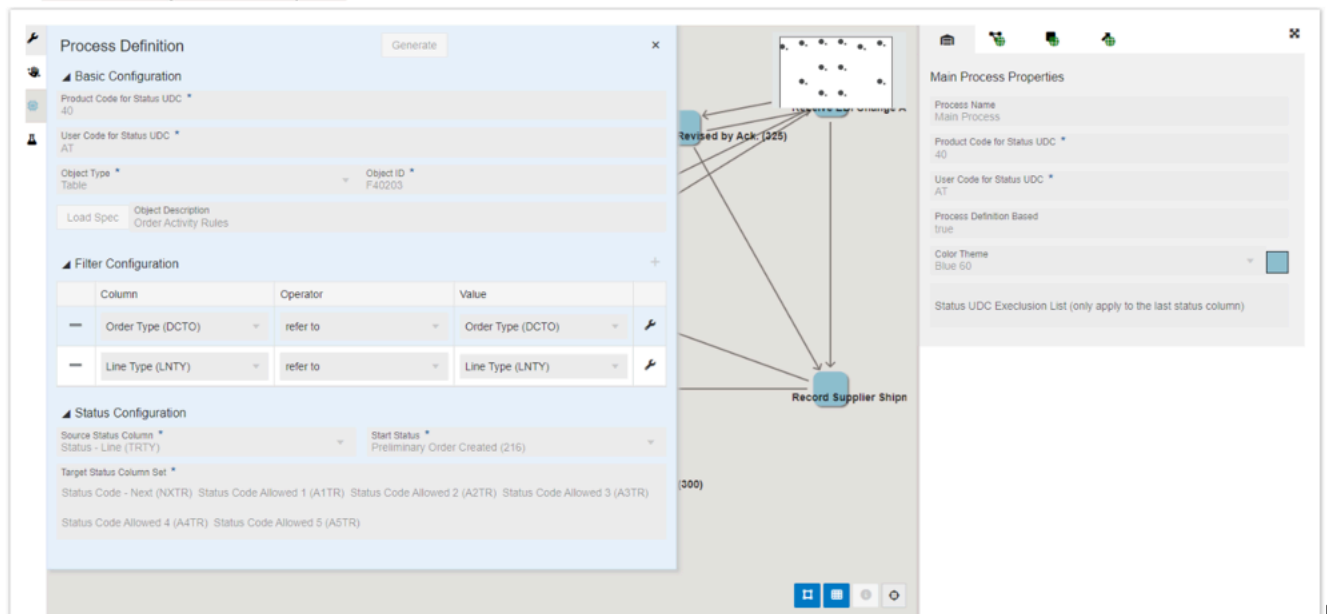
8. You can drag and drop the nodes to the required position and use the following options to adjust the template:

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.

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



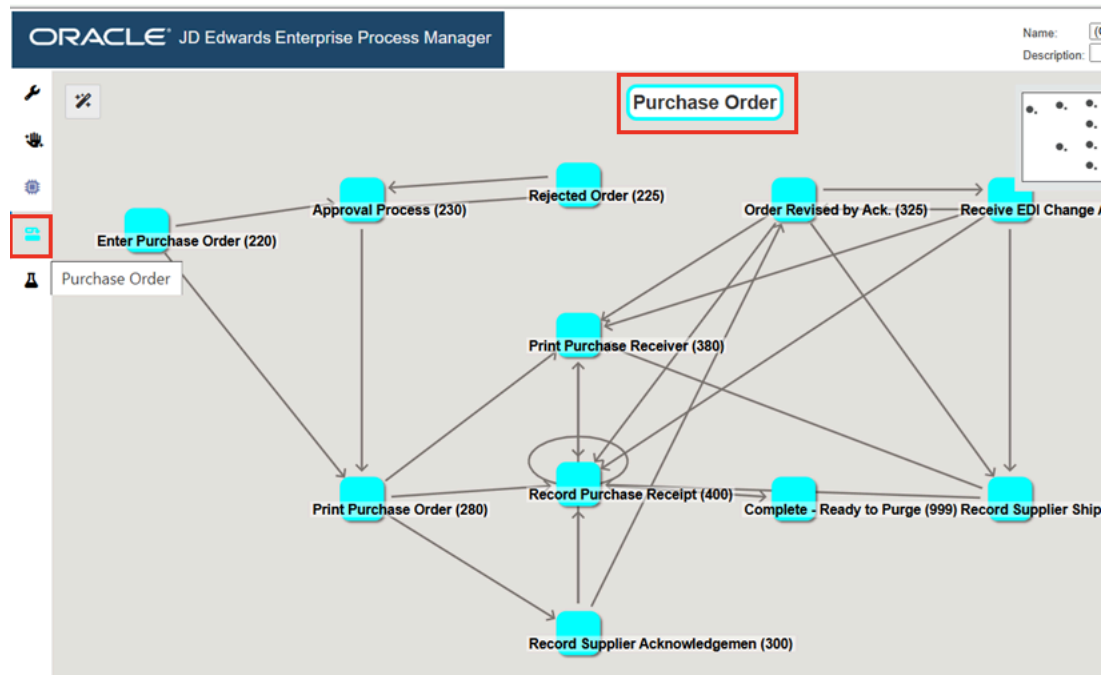
10. In the Process Model tab, to review the details of the metrics, click the following tabs on the right:


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.
11. 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.
12. 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.
13. 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.

Starting with Tools Release 9.2.9.3, if a template contains a child template, the system displays a child template tab icon below the Process Model tab icon. This tab displays the automatically generated process model diagram of the child template. The name and the cyan

color theme of the child template is displayed for this tab as shown in the following example:



- 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.

Starting with Tools Release 9.2.9.3, if a template includes a connected template, you can preview both the parent and the child processes using the Preview tab. In this case, the system displays the Hierarchy Map window showing the hierarchy between the processes in the Preview tab. You can drag and drop this window to resize it. You can also use the Hide Hierarchy Window icon or Show Hierarchy Window icon as per your preference.

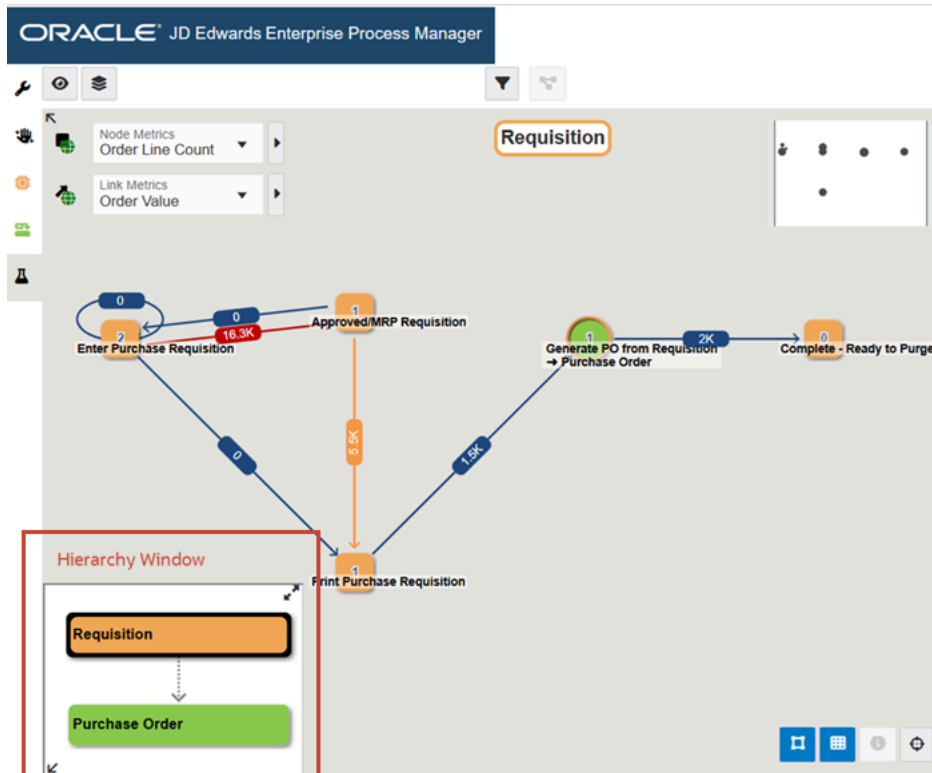
Note: The color themes for the parent and child templates can be selected while creating the template.

In following example, the parent and child processes are displayed based on the selected color themes. The connected child process is indicated by the circular node in green (Purchase Order).

You can right-click this node and click **Drill into Connected Process** to open the child process window.

In the Hierarchy window, you can click the **Requisition** (in orange color) to preview the parent process, and you can click the **Purchase Order** (in green color) to preview the child process. To indicate that the parent

process is displayed as a preview, the system displays a dotted arrow to the child process. To indicate that the child process is displayed as a preview, the system displays a prominent arrow to the child process.



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.

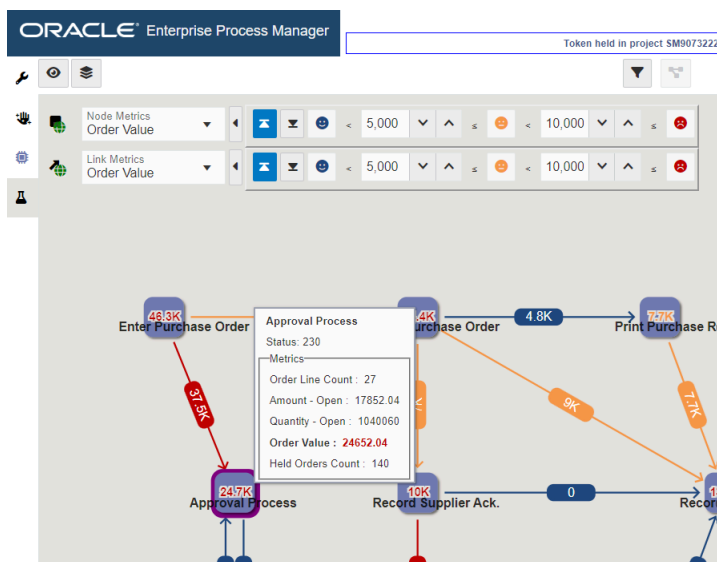
3. You can make changes to the metrics of the nodes and links by selecting the values from the **Node Metrics** and **Link Metrics** drop-down lists. Click the arrow icon next to the Node Metrics and Link Metrics fields to change the threshold values.

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:

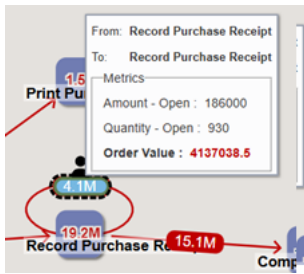
- a. Hover over the node to view the status code and metric details on the hover form. On the hover form, the field selected in the Node Metrics drop-down list is displayed in bold and its value is displayed in the threshold color.

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.
- c. (Tools Release 9.2.9.3) The system displays a loop around the node if an activity rule involves a self-referential loop (for example, transitioning from the 400 status back to the 400 status within the activity rules). In the Preview tab, the self-referential loop displays the appropriate metric values depending on the options defined in the Show Display Options and Show Filter Options windows. You can hover over the loop to view the From, To, and Metric details of the loop. When you click the loop, the system displays a People icon and a border to indicate that the link is selected. The system displays a dashed border

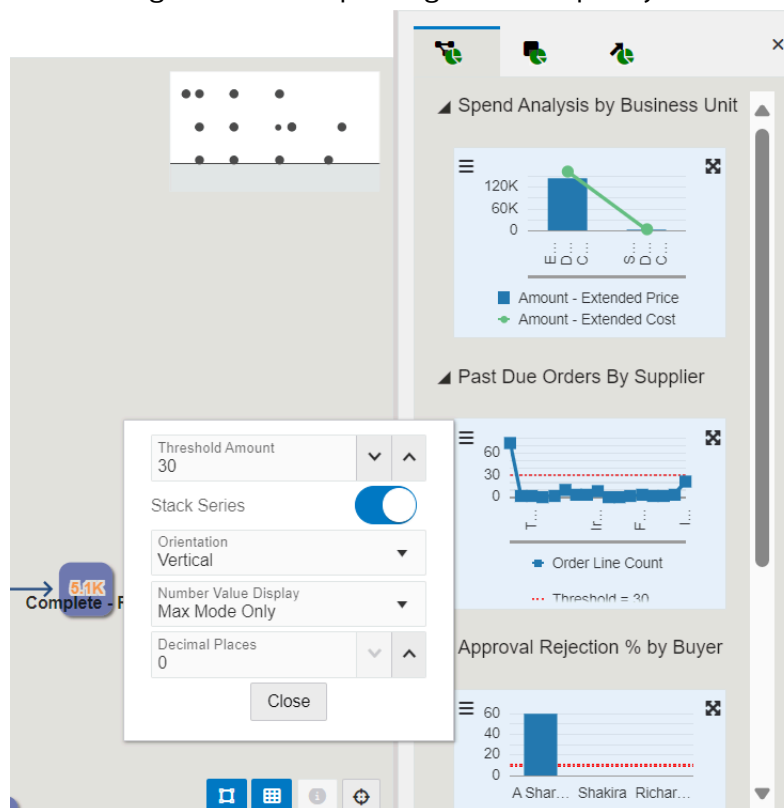
(with a "marching ants" effect) around the link when you hover over a selected link. The corresponding analytics are displayed on the Link Analytics tab on the right.



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.

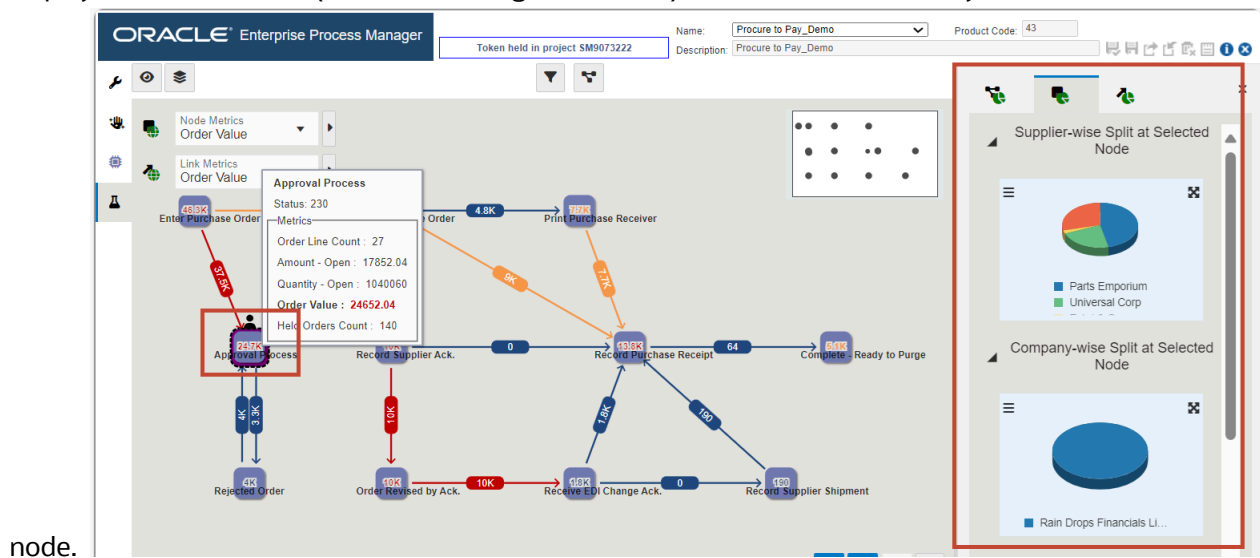
- On the chart, click the **Configure** icon  and enable the **Stack Series** option if you want to view the bar chart or pie chart in the stack chart format .
- Select the values as required in the Configure window for the charts such as Orientation (Vertical or Horizontal), Number Value Display (Never, 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.




- 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.

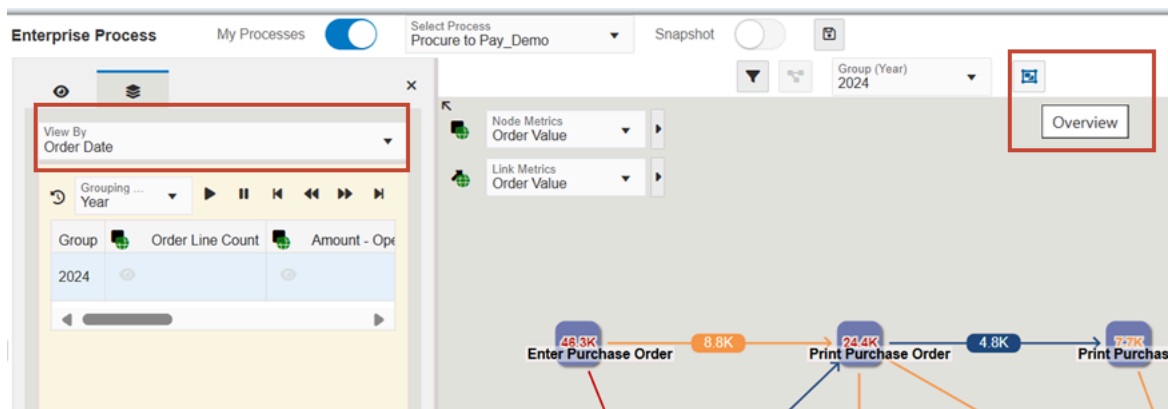
To refine the link details, use the following options:

- 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 Labels 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.

(Tools Release 9.2.9.3) If you select an option other than Overview, the system displays the Overview icon next to the Group drop-down list. Click this icon to reset the value in the View By drop-down list to Overview.



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.

Note: (Tools Release 9.2.9.3): When you save a process UDO from a template that has connected templates, the system will combine the specifications of the connected templates into a single static UDO and save them as a single UDO.

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. |
| 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.

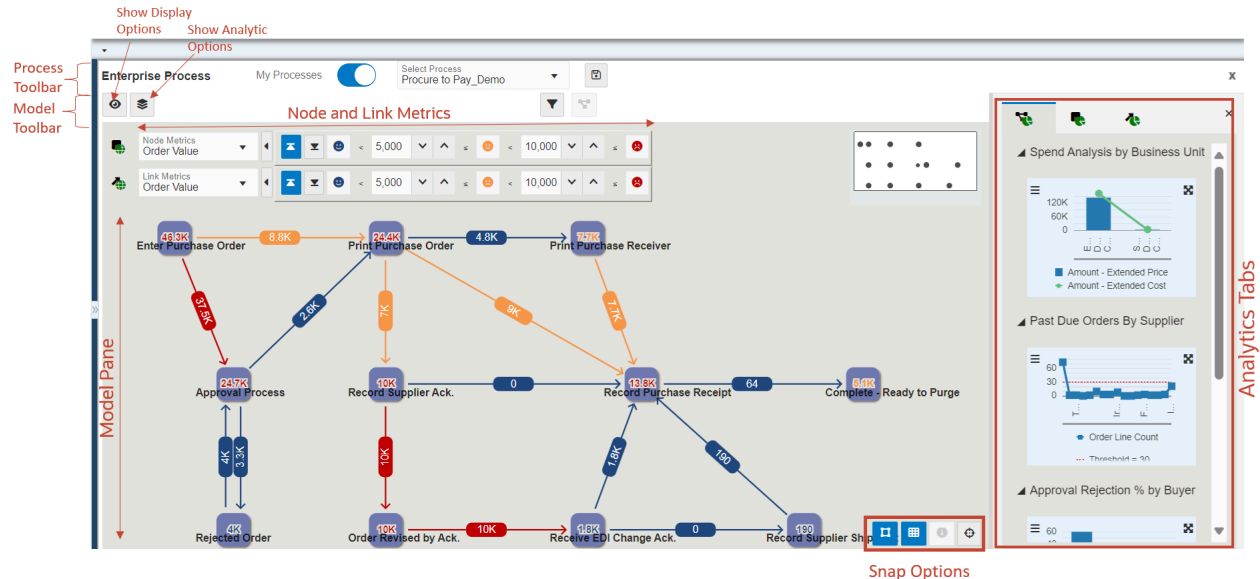
2. From the User menu, click **Enterprise Processes**.

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*.

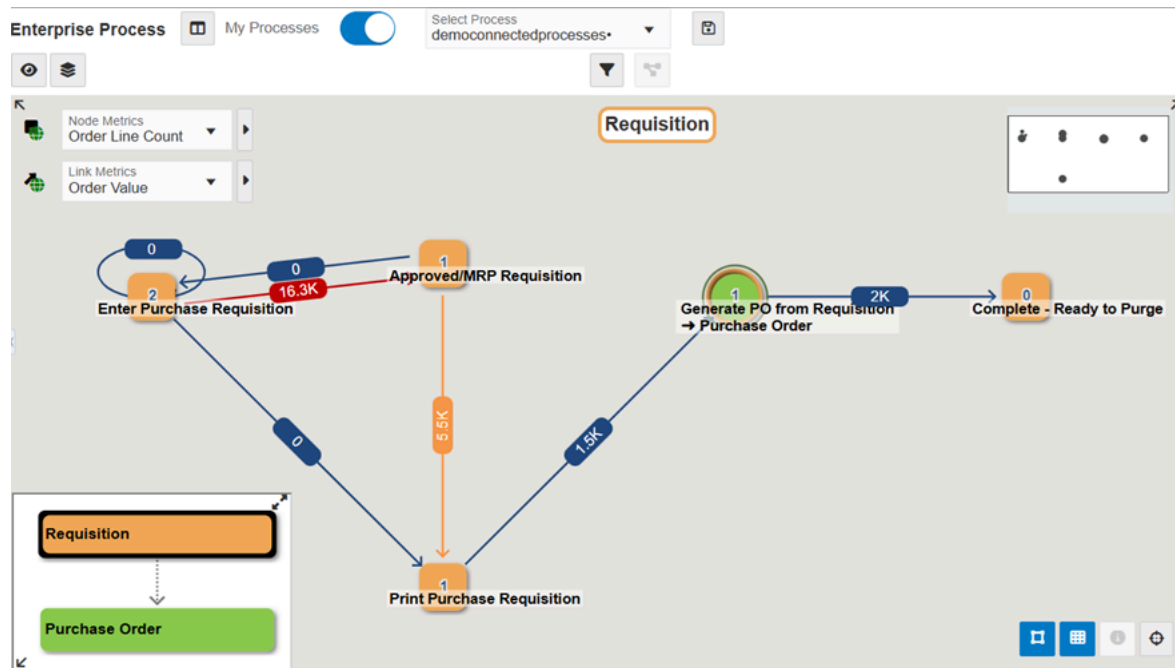
5. Starting with Tools Release 9.2.9.3, if a template includes a connected template, you can analyze both the parent and the child processes using the Enterprise Process window. In this case, the system displays the Hierarchy Map window showing the hierarchy between the processes in the Enterprise Process window. You can drag and drop this window to resize it. You can also use the Show Hierarchy Window icon  or Hide Hierarchy Window icon as per your preference.

Note: The color themes for the parent and child templates can be selected while creating the template.

In the following example, the parent and child processes are displayed based on the selected color themes. The connected child process is indicated by a circular node in green (Purchase Order). You can right-click this node and click **Drill into Connected Process** to open the child process window.

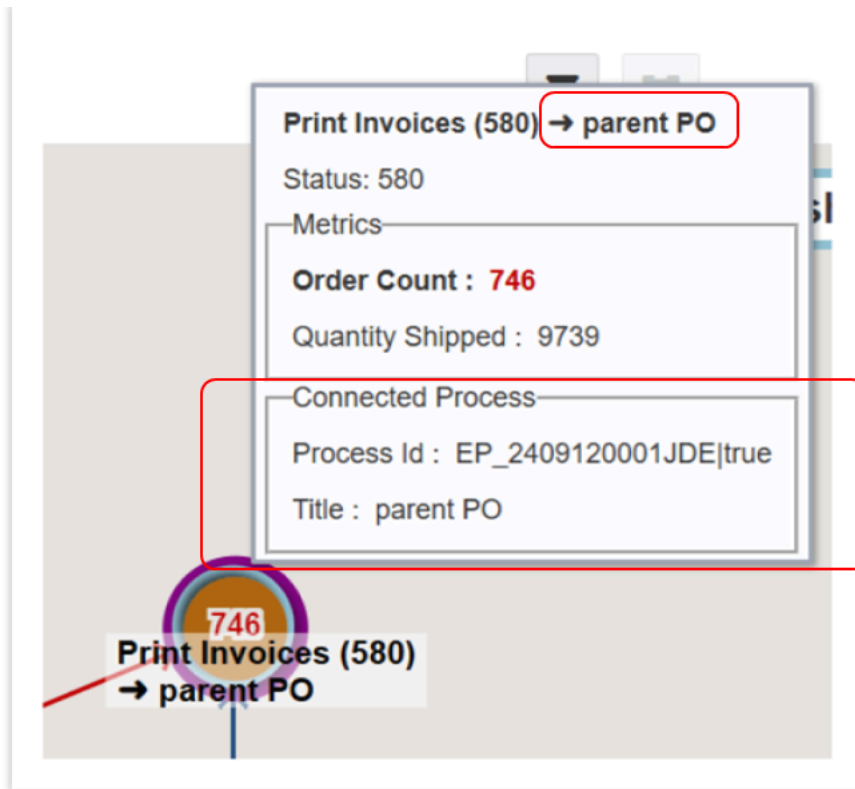
In the heirarchy window, you can click **Purchase Order** (in green color) to view and analyze the child Purchase Order process and click **Requisition** (in orange color) to view and analyze the parent Requisition process. To

indicate that the parent enterprise process is displayed, the system displays a dotted arrow to the child process. To indicate that the child process is displayed, the system displays a prominent arrow to the child process.

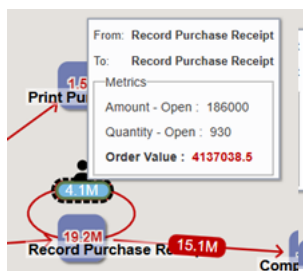


You can hover over the connected node to view information, such as the connected process, status code, and metric details on the hover form. On the hover form, the field selected in the Node Metrics drop-down list is displayed in bold, and its value is displayed in the threshold color.

In the following example screenshot, you can see the details of the connected process.



6. (Tools Release 9.2.9.3) You may see a loop around the node if an activity rule involves a self-referential loop (for example, transitioning from the 400 status back to the 400 status within the activity rules). The self-referential loop displays the appropriate metric values depending on the options defined in the Show Display Options and Show Filter Options windows. You can hover over the loop to view the From, To, and Metric details of the loop. When you click the loop, the system displays a People icon and a border to indicate that the link is selected. The system displays a dashed border (with a "marching ants" effect) around the link when you hover over a selected link. The corresponding analytics are displayed on the Link Analytics tab on the right.




7. 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.

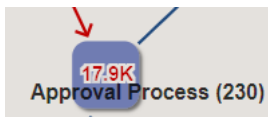
Show Display Options:

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:

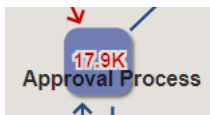
- **Description and Code:**

Displays both the description and status code on the nodes.



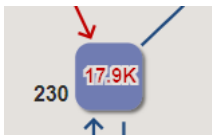
- **Description Only:**

Displays the descriptions on the nodes.



- **Code Only:**

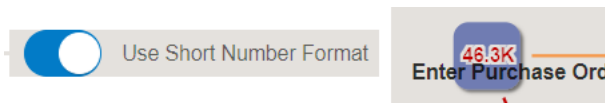
Displays the status codes on the nodes.



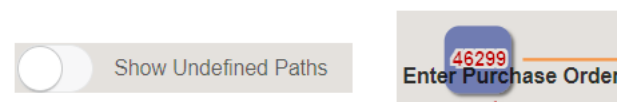
3. Enable or disable these options as required:

- **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

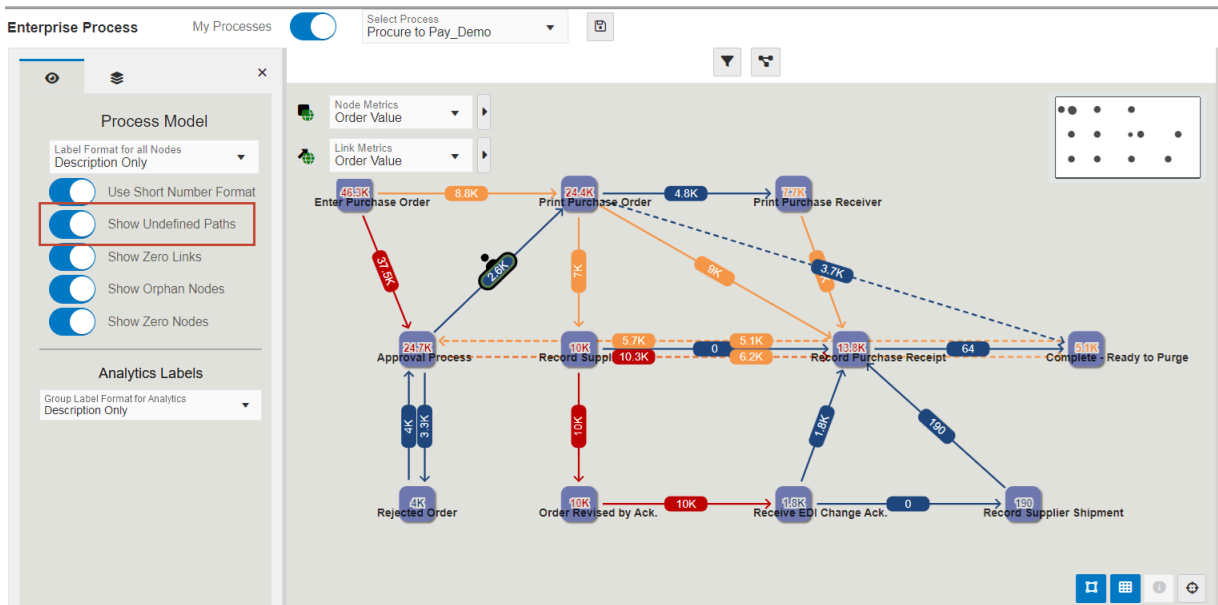


Example: User Short Number Format Disabled



- **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.

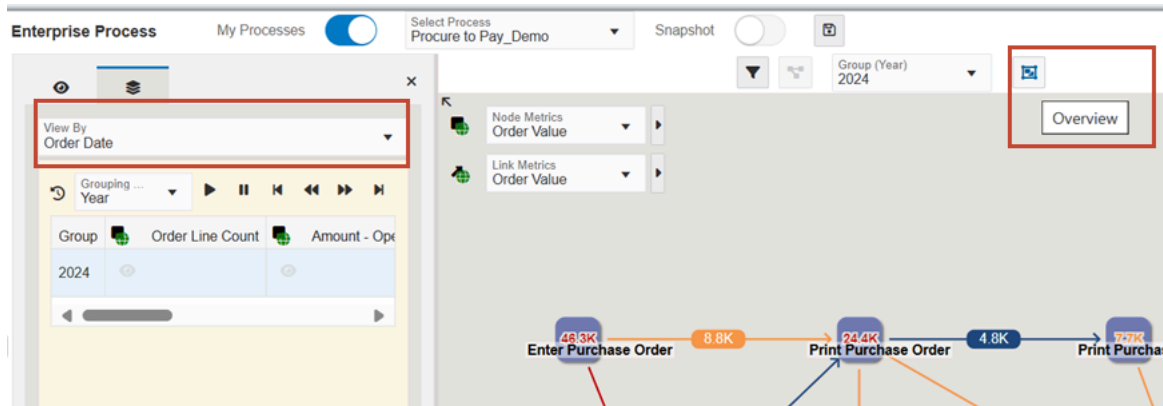
The system displays the changes on the enterprise process diagram and analytics tabs when you make changes in the Analytics Options pane.

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.

(Tools Release 9.2.9.3) If you select an option other than Overview, the system displays the Overview icon next to the Group drop-down list. Click this icon to reset the value in the View By drop-down list to Overview.

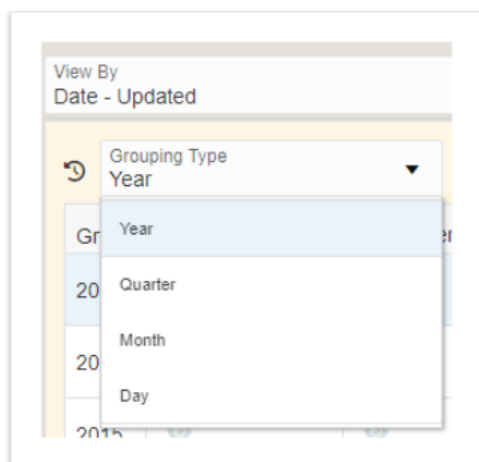


Timeline View for Date and UTime Data Types

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:

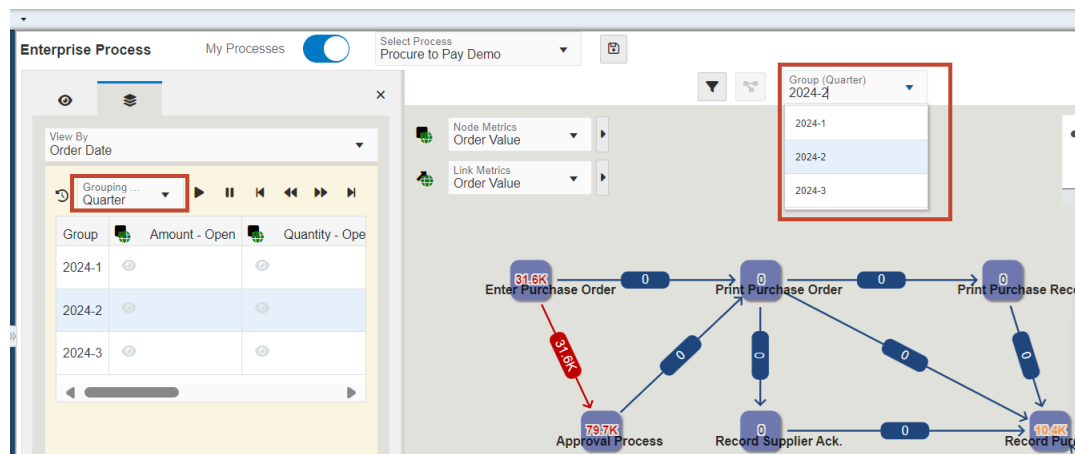
- a. Select any of these options from the Grouping Type drop-down list: Year (calendar year), Quarter (calendar quarter), Month, and Day.




- 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.

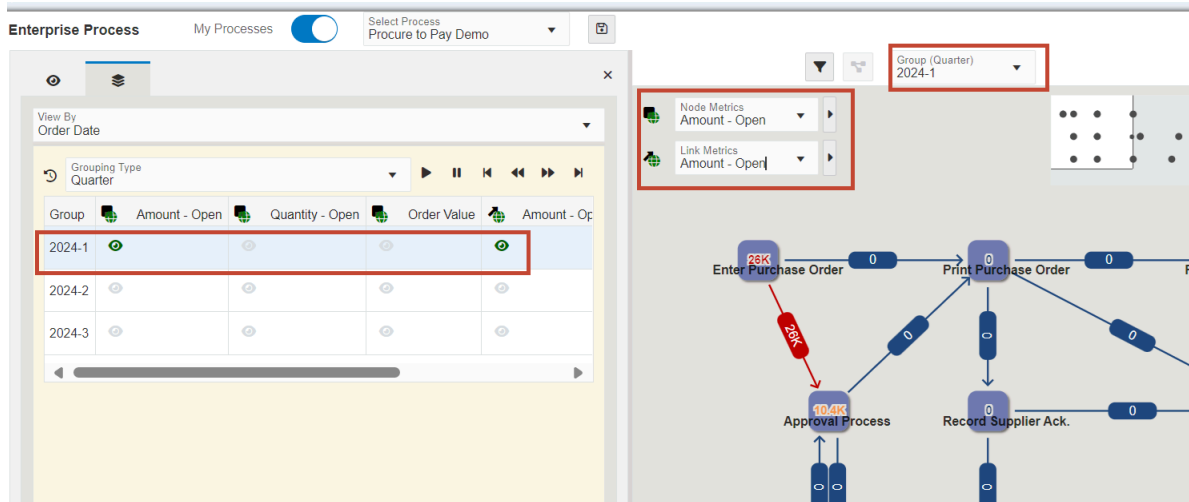


- c. To analyze the enterprise process using different values, click the **Select Metrics** icon  on the rows to select a value for the Node and Link Metrics. The system changes the values accordingly in the Node Metrics and Link Metrics fields and displays the changes on the enterprise process diagram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

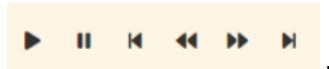
For example, in the following screenshot, in the 2024-1 row, the metrics are selected (indicated by the **Select Metrics** icon) for the Amount-Open columns for Node Metrics and Link Metrics. The

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:

- 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.
- 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.

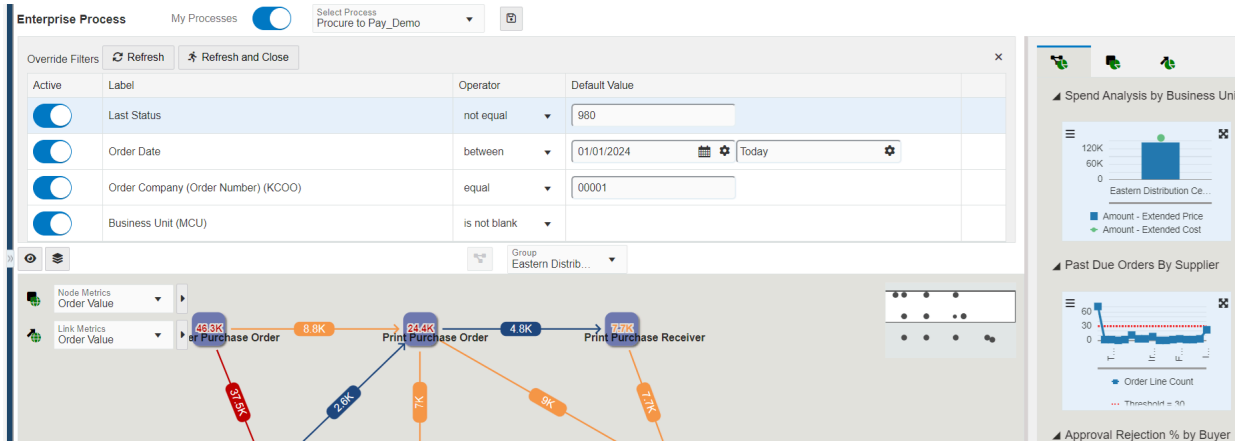
- Click the **Begin, Previous, Next, and End** icons to view the Node and Link metrics of different groups.
- Click the **Hide View Options** icon (X) to close the Analytics Options pane.

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:



The screenshot displays the 'Enterprise Process' interface. At the top, there's a 'My Processes' section with a toggle and a dropdown menu set to 'Procure to Pay_Demo'. Below this is the 'Override Filters' pane, which contains a table with filter options:

| Active | Label | Operator | Default Value |
|-------------------------------------|-------------------------------------|--------------|------------------|
| <input checked="" type="checkbox"/> | Last Status | not equal | 980 |
| <input checked="" type="checkbox"/> | Order Date | between | 01/01/2024 Today |
| <input checked="" type="checkbox"/> | Order Company (Order Number) (KCOO) | equal | 00001 |
| <input checked="" type="checkbox"/> | Business Unit (MCU) | is not blank | |

Below the filters, there's a process flow diagram showing nodes like 'Purchase Order', 'Print Purchase Order', and 'Print Purchase Receiver' with associated values and links. On the right, there are two charts: 'Spend Analysis by Business Unit' and 'Past Due Orders By Supplier'.

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 >=.

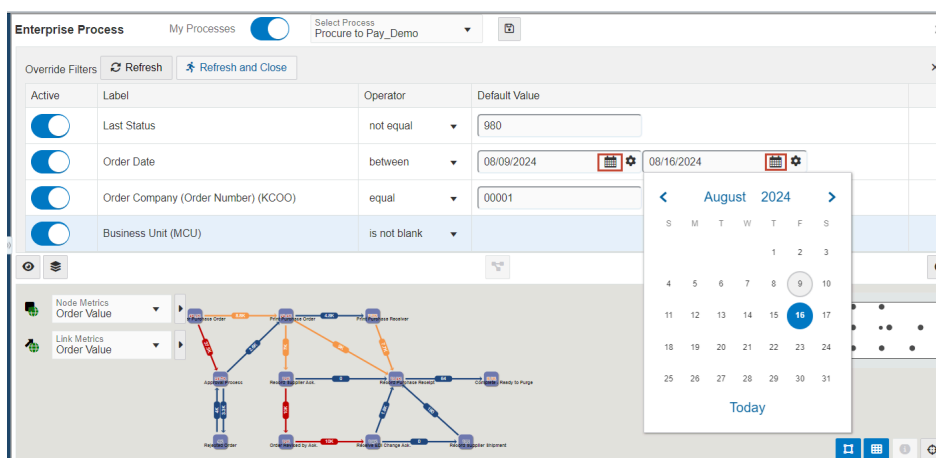
4. In the Default Value field, either enter a value or select a date value.

The system supports the following filter values:

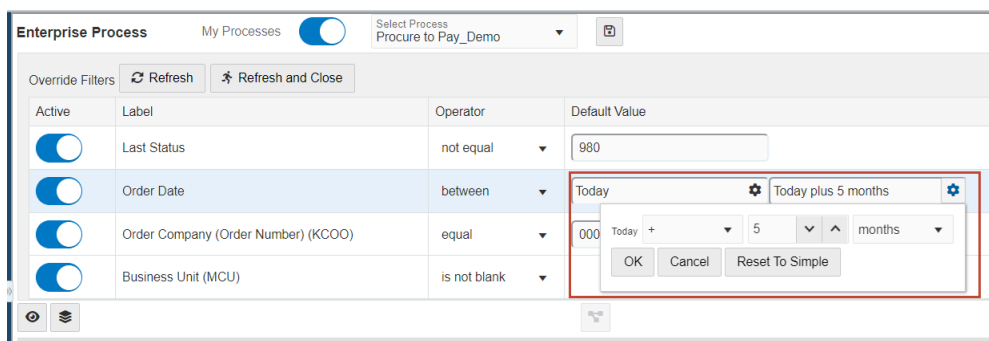
- No value is required for "is blank" and "is not blank" operators.
- Allow list editing for "in list" operator (system supports tab key, auto-clean empty entries, keep at least one entry). When you type the last entry, the system automatically appends a new empty input as the last entry.
- Two-value 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.

(Tools Release 9.2.9.3) You can hide and unhide Node Metrics and Link Metrics by using the Hide Metric Selectors icon  and the Show Metric Selectors icon .

You can also make changes to the node and link metrics by using the Show Analytics options. See [Using the Show Analytics Option](#).

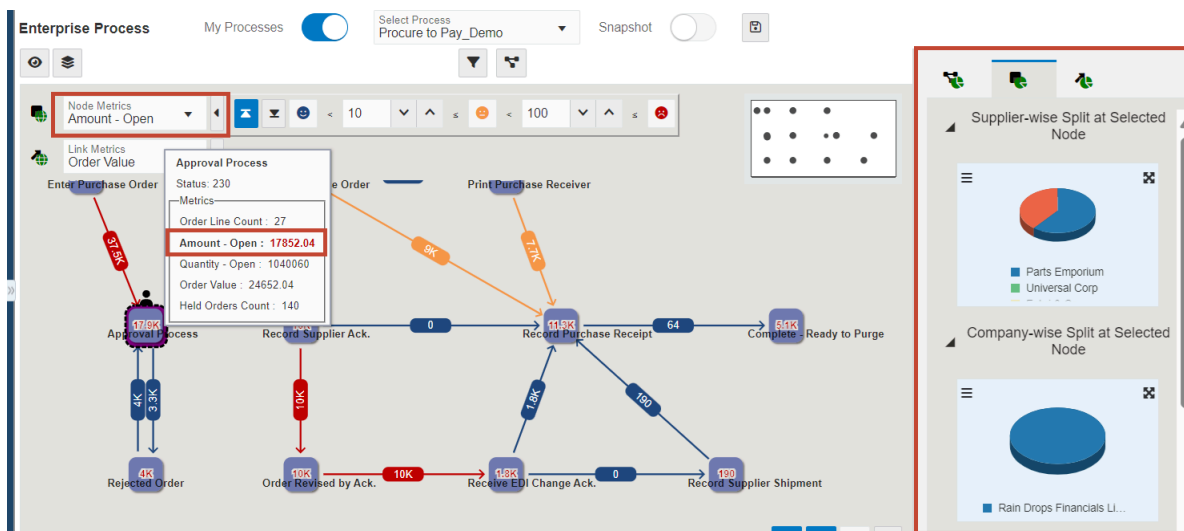
1. Click the **Node Metrics** drop-down list (in the model pane) and select the required value.
2. To make changes to the threshold values of the nodes, click the **Expand Threshold Configurator** icon, and click the **Ascending** or **Descending** icons, or enter the values in the fields. You can determine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

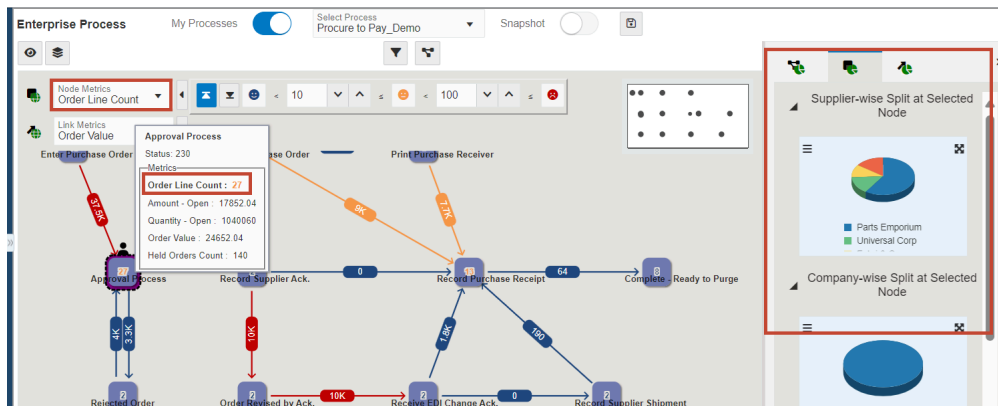
In the following example, Order Value is selected from the Node Metrics drop-down list. On the hover form, the selected field is displayed in bold and its value (24.7K) is displayed in red on the node, and on the hover form. The value is displayed in red because it exceeds the threshold value. The corresponding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



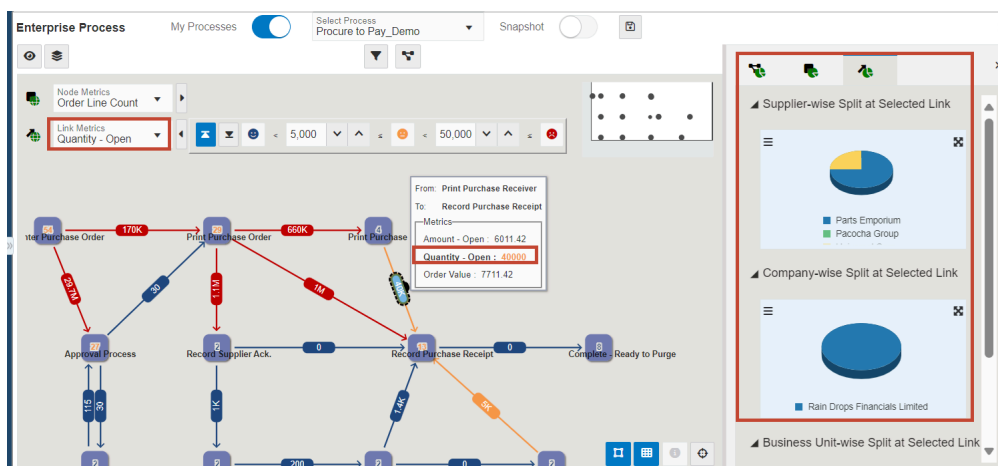
In the following example, Order Line Count is selected from the Node Metrics drop-down list. On the hover form, the name is displayed in bold, and its value (27) is displayed in orange because it is indicating the warning

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.



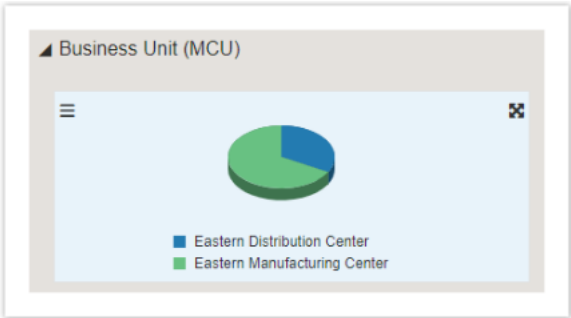
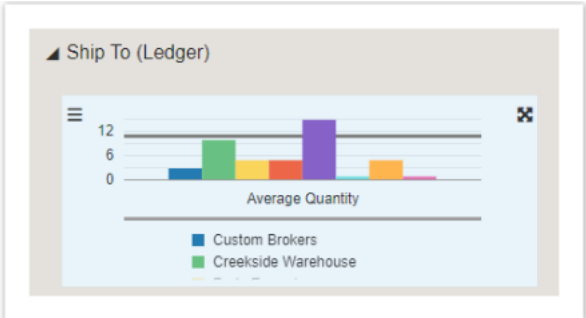
8. Click the **Collapse Threshold Configurator** (arrow) icon to close the configurator window.

Using the Analytics Tabs

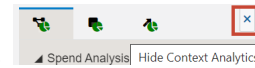
The following analytics tabs are displayed on the right side of the Enterprise Process window:

- **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 |  A screenshot of a pie chart titled "Business Unit (MCU)". The chart is divided into two segments: a blue segment representing the "Eastern Distribution Center" and a green segment representing the "Eastern Manufacturing Center". The chart is displayed within a light blue window with a hamburger menu icon on the top left and a close icon on the top right. |
| avg, min, max | Bar chart, with a reference line to present the current context value. |  A screenshot of a bar chart titled "Ship To (Ledger)". The y-axis is labeled "Average Quantity" and ranges from 0 to 12. The chart shows two bars: a blue bar for "Custom Brokers" and a green bar for "Creekside Warehouse". A horizontal reference line is drawn across the chart at the value of 6. The chart is displayed within a light blue window with a hamburger menu icon on the top left and a close icon on the top right. |

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



and



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.

- ### Vertical Orientation

Inventory Limit
1,200

Stack Series

Orientation
Vertical

Number Value Display
Max Mode Only

Decimal Places
0

Close

| Category | Total Count |
|----------|-------------|
| S... | 1,800 |
| N... | 200 |
| R... | 800 |
| R... | 100 |
| N... | 100 |
| O... | 2,800 |
| R... | 200 |
| *ALL | 2,800 |
| N... | 100 |
| N... | 100 |

The screenshot shows the 'Inventory Limit' configuration window on the left and a chart on the right.

Configuration Window:

- Inventory Limit:** 1,200
- Stack Series:** ☐
- Orientation:** Horizontal
- Number Value Display:** Max Mode Only
- Decimal Places:** 0
- Close** button

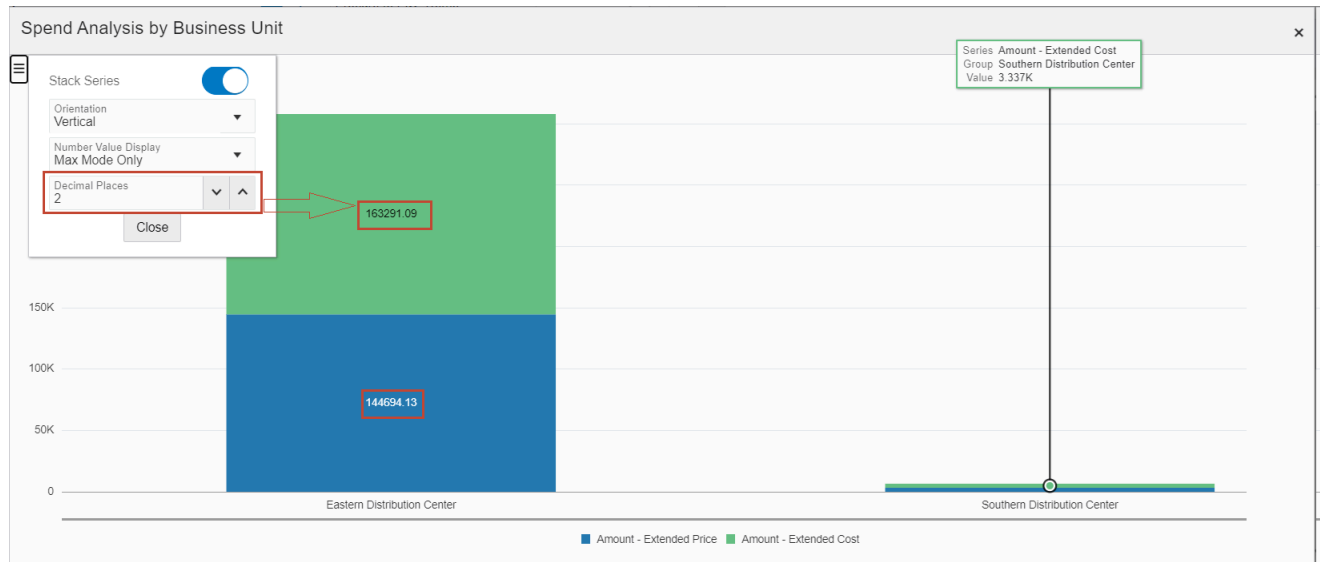
Chart:

The chart displays the 'Total Count' for various roles, with a vertical red dotted line indicating the 'Inventory Limit = 1200'.

| Role | Total Count (Approximate) |
|----------|---------------------------|
| SYSADMIN | 1.8K |
| REMROLEA | 0.8K |
| NTFROLE4 | 0.1K |
| ROLE1 | 0.2K |
| *ALL | 2.9K |
| NTFROLE3 | 0.1K |

- Percentage Threshold: 10
- Stack Series: ☒
- Orientation: Vertical
- Number Value Display: Max Mode Only
-
- Employee Percentage Others
- Customer Percentage

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.



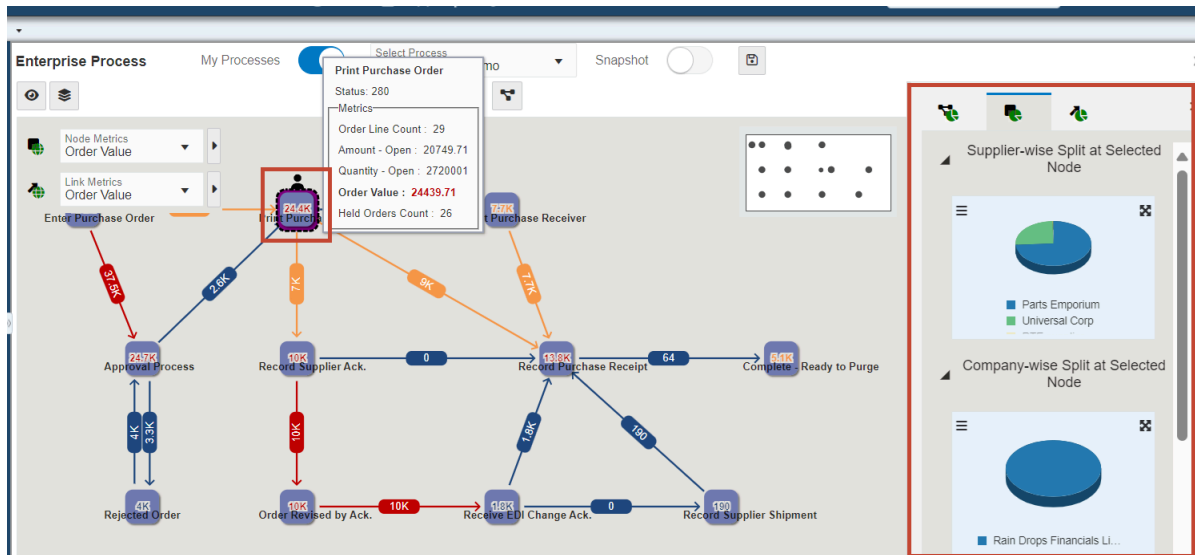
5. Click the Number Value drop-down list to override the default value (**Max Mode Only**: displays the numbers in the maximized mode but hides them in the embedded mode) and select **Never** or **Always**.
6. Click **Close** to close the Configure window.
7. Hover over the colors on the charts to analyze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

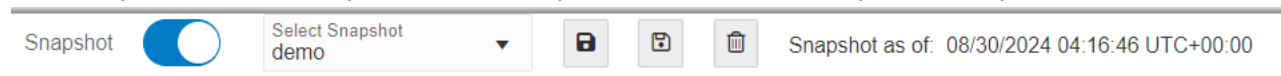
Analyzing Snapshot

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](#).

5 Appendix A - Creating a Process Definition

Understanding the Process Definition Application

You can create process definitions that the Enterprise Process Modeler can use to generate process flow diagrams for processes that do not use the order activity rules. The **Work with Process Definition** application (P00201) enables you to define process flows using values from the User-Defined Codes (UDC) tables.

The usage of the Work with Process Definition application is limited to creating process flows in the Enterprise Process Modeler tool and does not allow you to perform transactions or ledger entry activities.

You can create and modify process definitions using the **Process Definition Revision** form.

The system uses the **Work with Process Definition** application (P00201) to write the process flow header and detail record values to these tables:

- Process Definition Header (F00201)
- Process Definition Detail (F00202)

When you delete a process definition header record, the system also deletes the associated detail records from the F00201 and F00202 tables.

You can copy existing process definitions to create new process definition records, thereby minimizing redundant data entry. When you copy a process definition record, the system generates an incremented new and unique Process Definition ID and copies the values from the original record enabling you to revise the values on the new record.

Note: It is recommended to use a unique description for each process definition.

Forms Used to Work with Process Definition

| Form Name | Form ID | Navigation | Usage |
|------------------------------|---------|--|--|
| Work with Process Definition | W00201B | Enterprise Automation (G00EA), Process Definition (P00201) OR Enterprise Automation (G46EA), Process Definition (P00201) | Review process definition header information. Copy and delete process definition records. |
| Process Definition Revision | W00201G | Click Add , Copy , or select on the Work with Process Definition form. | Add, copy, or modify a process definition record. |

Setting Up a Process Definition Record

Access the **Process Definition Revision** form.

Process Definition ID

The system displays the unique key generated for the Process Definition record. The system generates this number using the Next Unique Number application (P00022).

Note: The Process Definition ID values starting with 9999 are reserved for modeler templates delivered by JD Edwards. For example, the process template for Warehouse will have Process Definition ID values starting with 99990001.

Product Code

Enter the product code that identifies the table that contains the associated user-defined codes.

Process Description

Enter a description for the process definition.

User Defined Codes

Enter a value that identifies the UDC table you want to associate with the process definition.

From Process Node

Enter a status code value from the UDC table, that indicates the first or start node of the process. This indicates the first node of the flow diagram that is generated by the Enterprise Process Modeler.

From Process Node Description

The system automatically populates this field with the description of the status code value entered in the **From Process Node** field.

To Process Node

Enter a status code value from the UDC table, that indicates the next step in the process flow. This indicates the next node of the process flow diagram that is generated by the Enterprise Process Modeler.

To Process Node Description

The system automatically populates this field with the description of the status code value entered in the **To Process Node** field.

Note: You can view the **To Process Node Description** field and Other Process Node 1 to 10 Description fields by selecting the **Show All Columns** format option in the drop-down menu on the grid. The default **Basic** view grid format does not include these process node description fields.

Other Process Node 1

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 2

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 3

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 4

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 5

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 6

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 7

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 8

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 9

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

Other Process Node 10

(Optional) Enter a status code value that indicates the next step in the process flow diagram that is generated by the Enterprise Process Modeler. You can override this status value if it is not the preferred or expected next step.

