# JD Edwards EnterpriseOne Tools

## Enterprise Process Modeler Guide

9.2

JD Edwards EnterpriseOne Tools
Enterprise Process Modeler Guide

9.2

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# Preface

# 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 view and analyze enterprise processes. Enterprise Process Modeler enables you to choose from a set of personal or published enterprise processes, visualize a graphic of the process model, visualize key performance indicators (KPIs), and metrics and measurements that apply to nodes and links within the process model, and other functions.

This guide has been updated for JD Edwards EnterpriseOne Tools Release 9.2.9 , 9.2.9.3, 9.2.26.0, and 9.2.26.2.

**Audience**

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

> **Note:** JD Edwards EnterpriseOne Tools Release 9.2.26.2, includes new capabilities for creating custom process models. Therefore, all the content about creating process models, either from predefined templates or your own custom models, has been moved to a new *Enterprise Process Manager Guide*.

## Enterprise Process Modeler Overview

The Enterprise Process Modeler provides a graphical tool for visualizing business processes, viewing metrics for the processes, and exploring analytics about how those processes are running. As a foundational piece of the Enterprise Automation framework, the Enterprise Process Modeler enables you to monitor, and measure the processes that are essential to your operations.

The key capabilities of the Enterprise Process Modeler are:

- Runtime mode: You can visualize an enterprise process based on real-time data and engage with the nodes interactively.
- Snapshot mode: You can capture and save a snapshot of the current runtime enterprise process data, enabling you to review it later and compare it to other snapshots.

> **Note:** *Enterprise Automation: Enterprise Process Modeler*

> **Note:** *Analyzing Business Processes Using Enterprise Process Modeler*

> **Note:** *Analyzing Business Processes Using Enterprise Process Modeler*

> **Note:** *Building an Enterprise Automation Dashboard*

**Note:** *Building an Enterprise Automation Dashboard*

# 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.

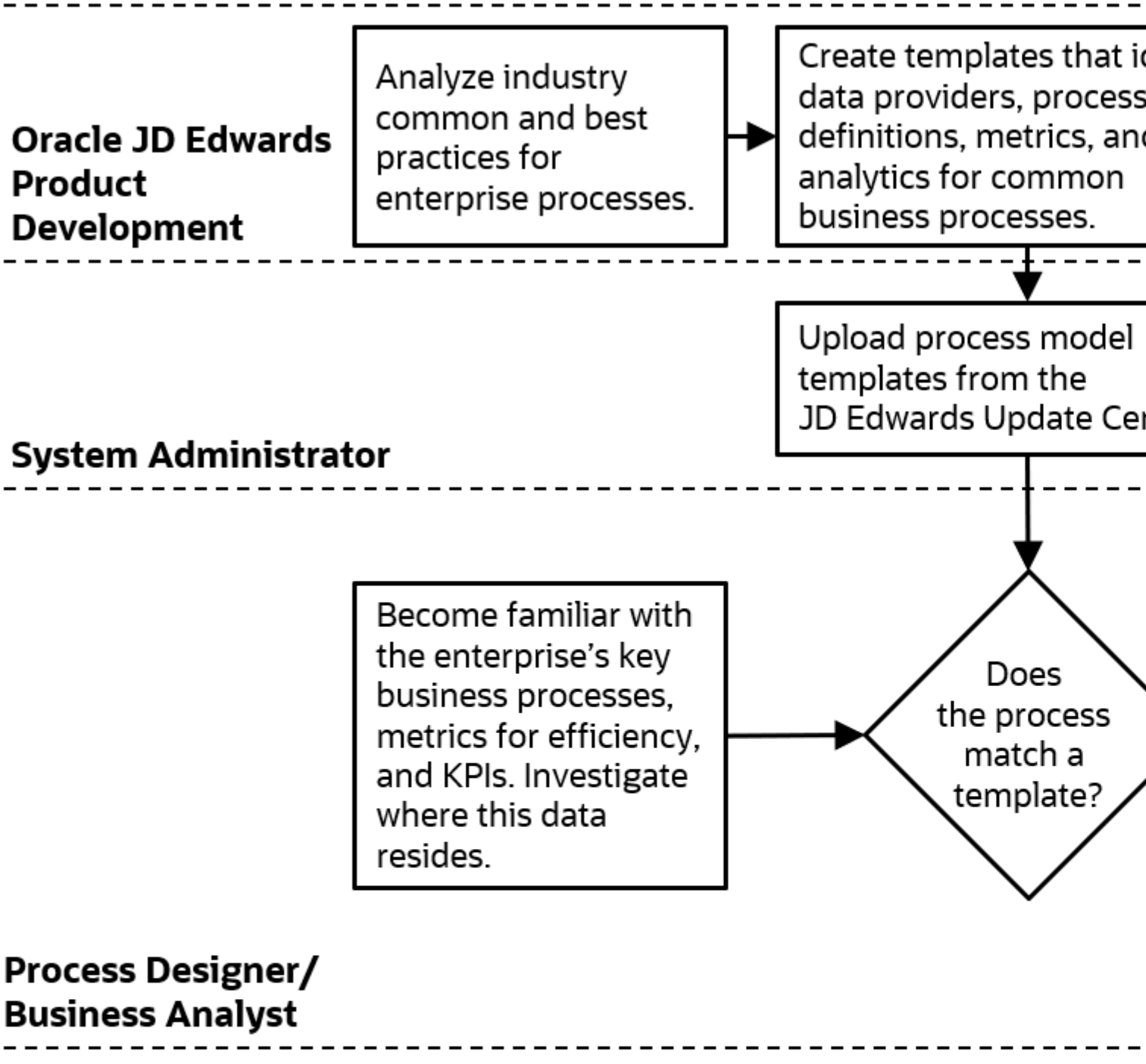
Like most ERP systems, JD Edwards EnterpriseOne offers applications to create business documents, such as a purchase order. Those applications set status codes on a purchase order, either manually by you or automatically by the application logic, as the purchase order moves through its lifecycle. JD 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 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.

# Enterprise Process Flowchart

The following flow chart depicts the different roles and tasks that are involved in defining, creating, and interacting with process models and preconfigured process model templates. The content in this guide focuses on you, the process owner or line-of-business manager, as you analyze your business processes using Enterprise Process Modeler.


Oracle JD Edwards Product Development
Analyze industry common and best practices for enterprise processes.
Create templates that id
data providers, process
definitions, metrics, and
analytics for common
business processes.
Upload process model templates from the JD Edwards Update Cer
System Administrator
Become familiar with the enterprise's key business processes, metrics for efficiency, and KPIs. Investigate where this data resides.
Does the process match a template?
Process Designer/ Business Analyst
Process Owner/ Line of Business Manager

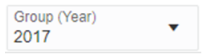
# 2 Understanding the Enterprise Process Modeler User Interface

## Understanding Icons

This section lists the icons and tabs displayed on the Enterprise Process Manager (design time) and Enterprise Process Modeler (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 |
| | (Tools Release 9.2.26.0)Toggle Compare View Mode | Icon |
| | (Tools Release 9.2.26.0) Link Level Summary for Comparison | Icon |
| | (Tools Release 9.2.26.0) Node Level Summary for Comparison | Icon |
| | (Tools Release 9.2.26.0) Preferences | Drop-down list |
| | (Tools Release 9.2.26.0) Show Inputs | Icon |
| | (Tools Release 9.2.26.0) Table Summary Format | Icon |
| | (Tools Release 9.2.26.0)Diagram Format | Icon |
| | (Tools Release 9.2.26.0) Create a New Split View | Icon |

| Image | Name | Type |
|---|---|---|
| | (Tools Release 9.2.26.0) Request Time Out: 30 Seconds | Icon |
| | (Tools Release 9.2.26.0) Remove this Split View | Icon |
| | (Tools Release 9.2.26.0) Drill into Data | Icon |
| | (Tools Release 9.2.26.0) Show Query Details | Icon |
| | (Tools Release 9.2.26.0) Toggle Table View | Icon |
| | Analytic | Indicator |
| | Metrics | Indicator |
| | (Tools Release 9.2.26.0)Analyze Snapshot | Menu |
| | incomplete or invalid input | Indicator |
| | (Tools Release 9.2.26.0) Open Sub Process | Menu |
| | (Tools Release 9.2.26.0) Remove Sub Process | Menu |

# Understanding Color Codes

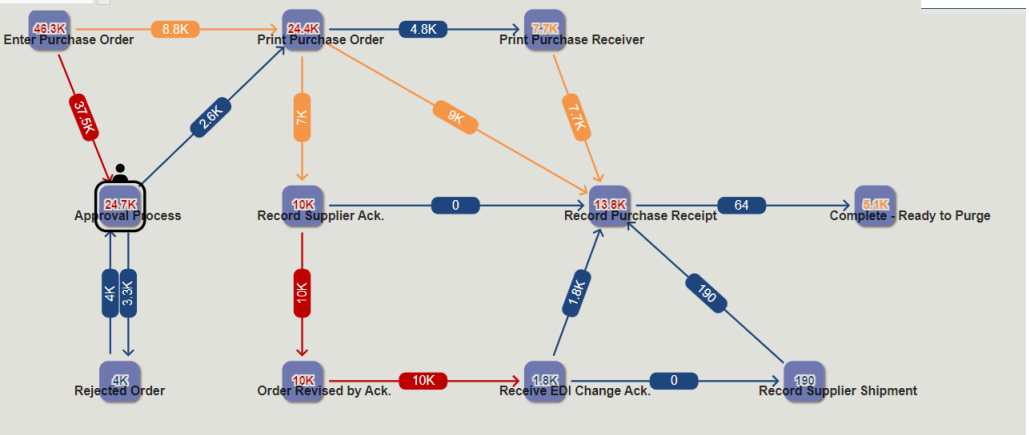
You can determine the status of the nodes and links by their color codes.

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 | Metrics within a normal threshold | |
| Orange | Metrics above or below a warning threshold | |

| Colors | Status | Icons displayed in Node Metrics and Link Metrics Options |
|---|---|---|
| Red | Metrics above or below a critical threshold | |

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

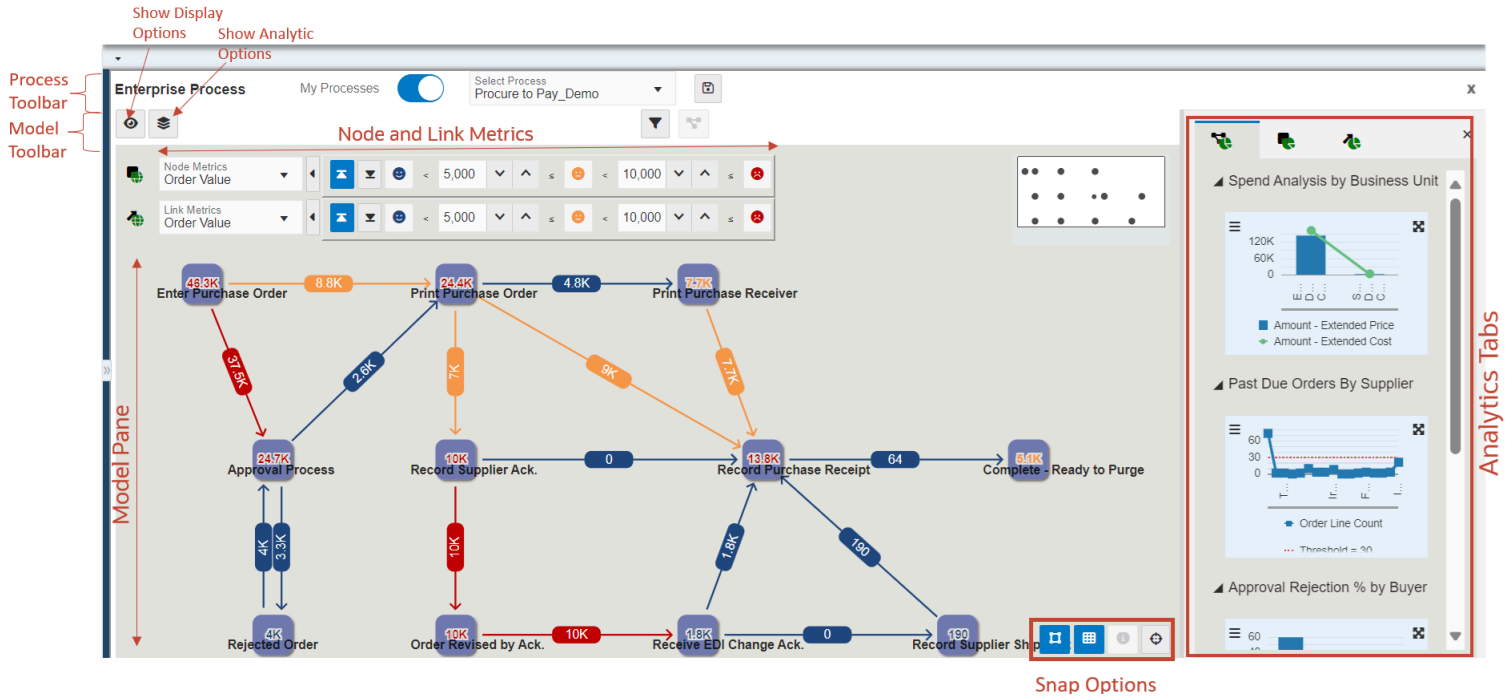



# Understanding Enterprise Process User Interface

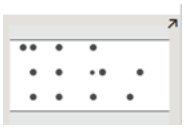
The Enterprise Process (runtime mode) window displays the enterprise process diagram that was generated by a process designer using Enterprise Process Manager. This window contains the following user interface elements: process toolbar, model toolbar, model pane, node and link metrics, analytics tabs 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**

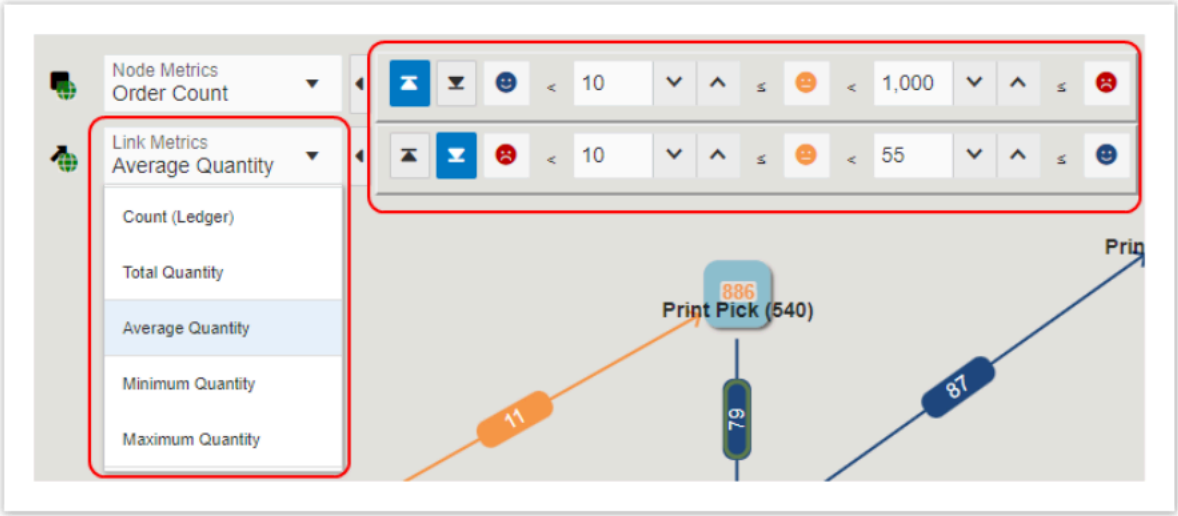
  When you click this icon, the system displays a left pane with analytics options. You can click the Hide View Options (X) icon to close this pane.

- **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 parent process includes a connected (child) process, you can view both the parent and the child processes. In this case, the system displays the Hierarchy Map window showing the hierarchy between the processes.

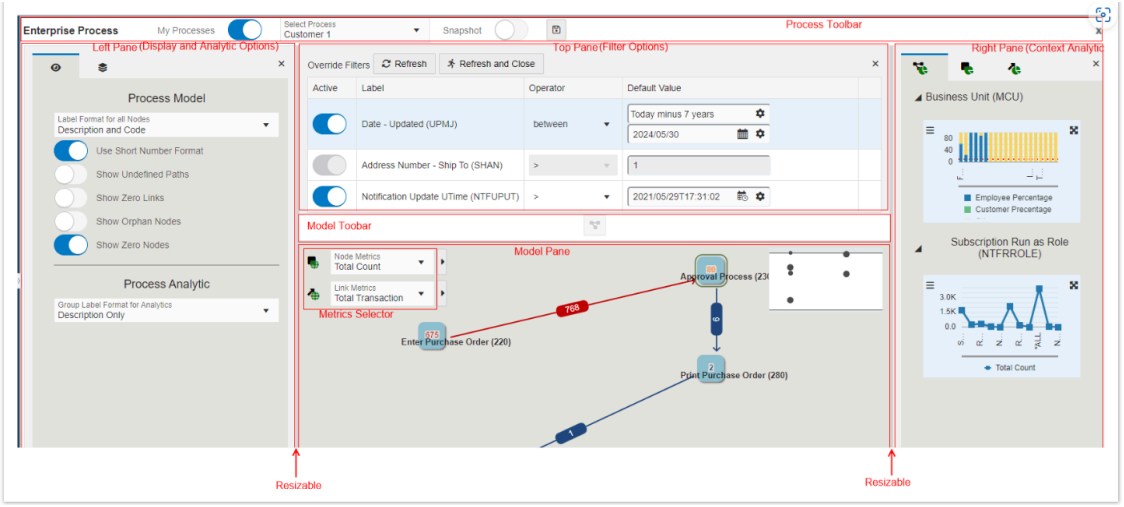
(Tools Release 9.2.9.3) The system displays a loop around the node in the design mode if an activity rule involves a self-referential loop (for example, transitioning from the 400 status back to the 400 status within the activity rules). The self-referential loop displays the appropriate metric values 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 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. You can choose from a set of preconfigured enterprise process models, which EnterpriseOne manages as user-defined objects (UDOs. The process models you can choose depend on the UDO security for those process models. You can visualize a graphic of the process model, visualize KPIs, metrics and measurements that apply to nodes and links within the process model, and other functions.

To analyze an enterprise process:

1. Access the JD Edwards EnterpriseOne application.

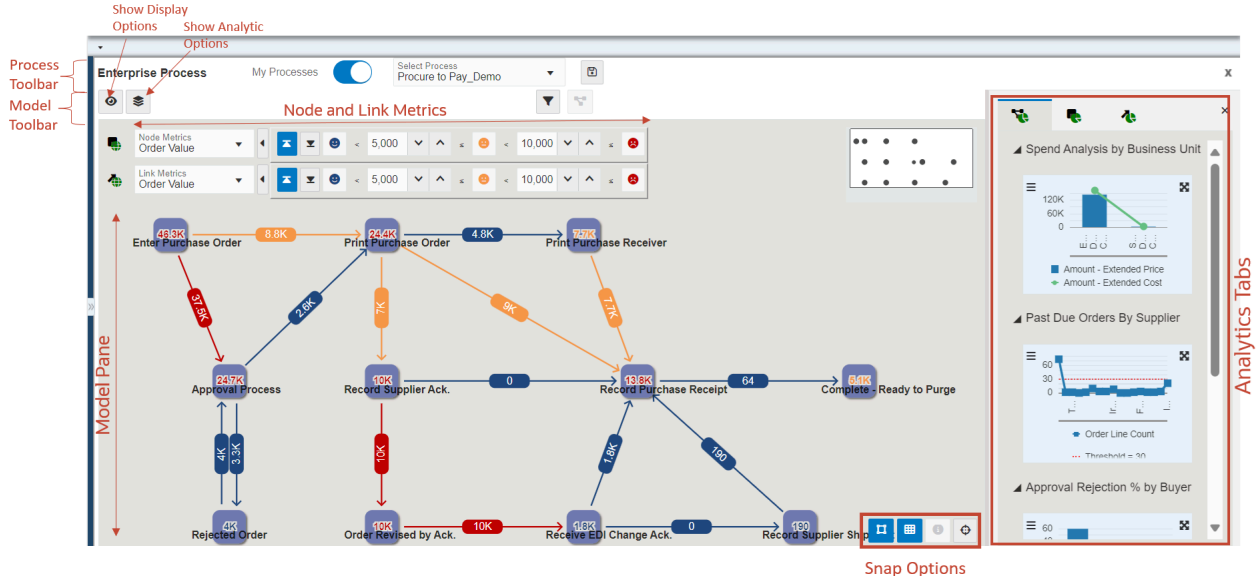
2. From the User menu, click **Enterprise Processes**.

   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*.

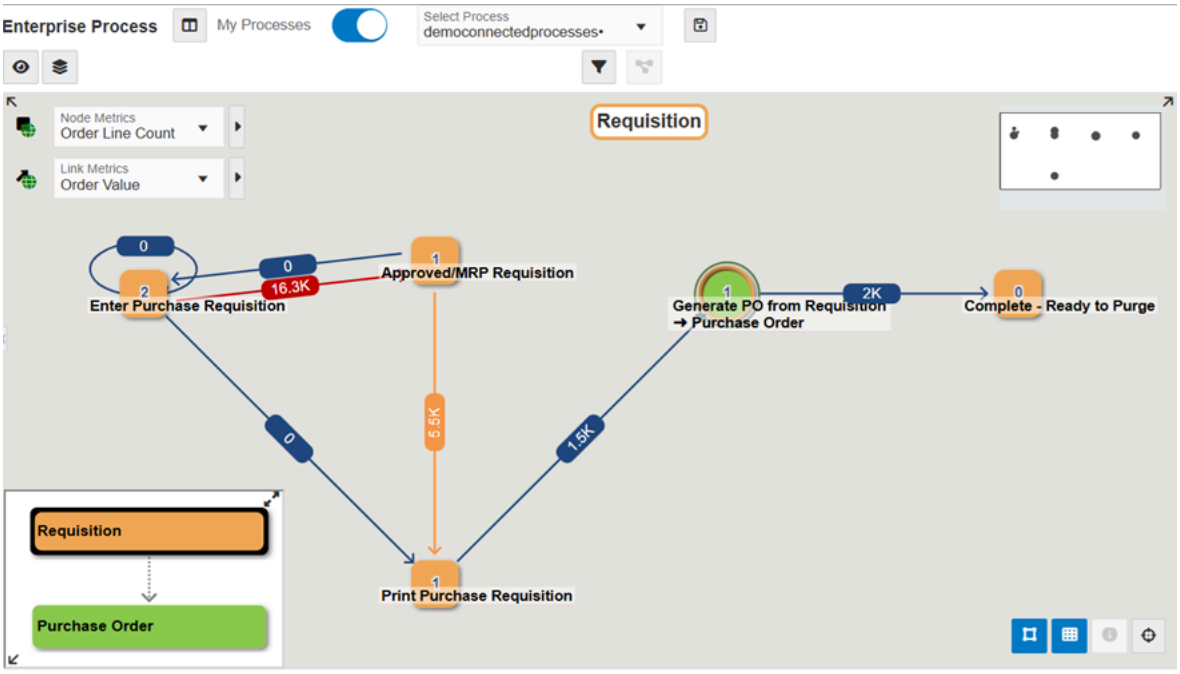
5. Starting with Tools Release 9.2.9.3, if a process model includes a connected process, you can analyze both the parent and the child processes using the Enterprise Process window. In this case, the system displays the Hierarchy Map window showing the hierarchy between the processes in the Enterprise 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 **Open Child Process** to open the child process window.

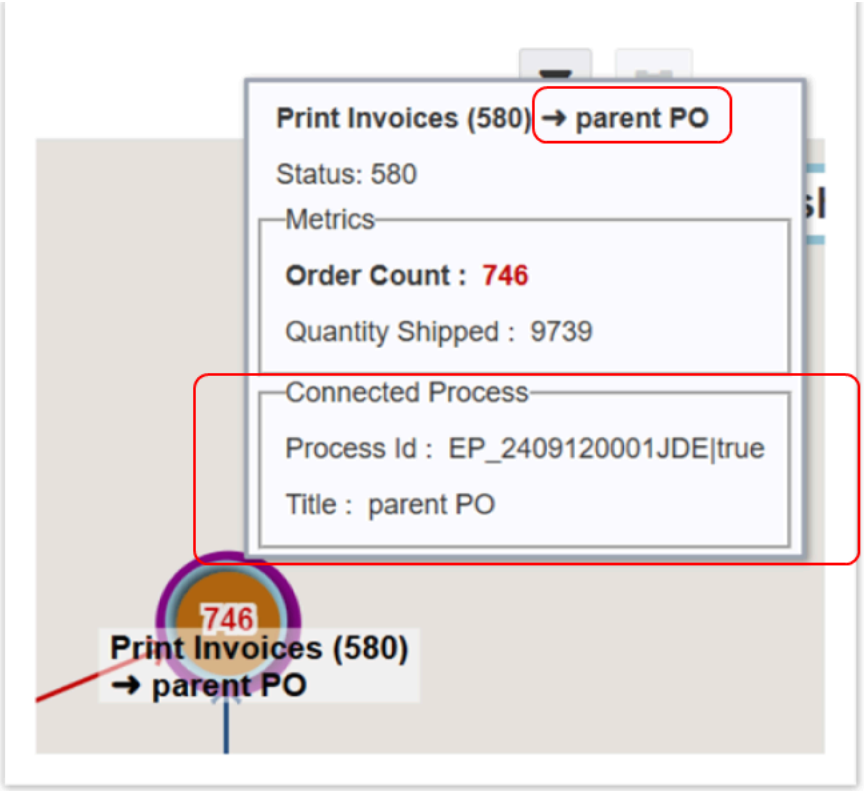
   In the hierarchy window, you can click **Purchase Order** (in green color) to view and analyze the child Purchase Order process and click **Requisition** (in orange color) to view and analyze the parent Requisition process. To

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.

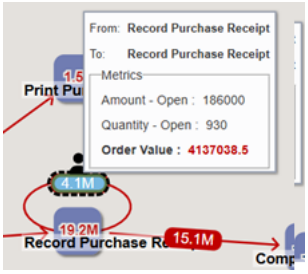



You can hover over the connected node to view information, such as the connected process, status code, and metric details on the hover form. On the hover form, the field selected in the Node Metrics drop-down list is displayed in bold, and its value is displayed in the threshold color.

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.

**Note:** (Tools Release 9.2.26.2) Based on the settings in the User Profile Revisions form, numbers are displayed with a thousands separator (, or .) to improve readability. This formatting is applied to the node and link hover forms, the Query Detail form, the table view of a maximized chart, and the base and compare values when comparing processes.

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.

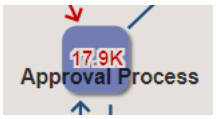
**Show Display Options:**

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**:

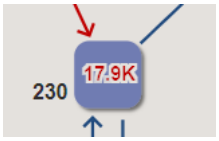
     Displays both the description and status code on the nodes.

     
   - **Description Only**:

     Displays the descriptions on the nodes.

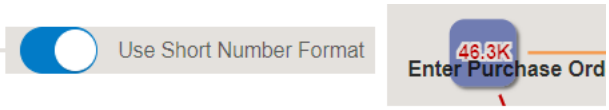
     
     
   - **Code Only**:

     Displays the status codes on the nodes.

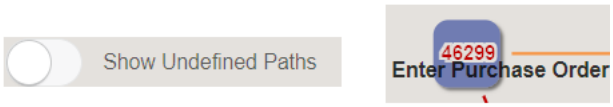
     
     

3. Enable or disable these options as required:
   - **Use Short Number Format**: Changes the number format displayed on the nodes. The system uses K, M, B, T to represent thousands, millions, billions, and so on if the value is greater than 1 unit.

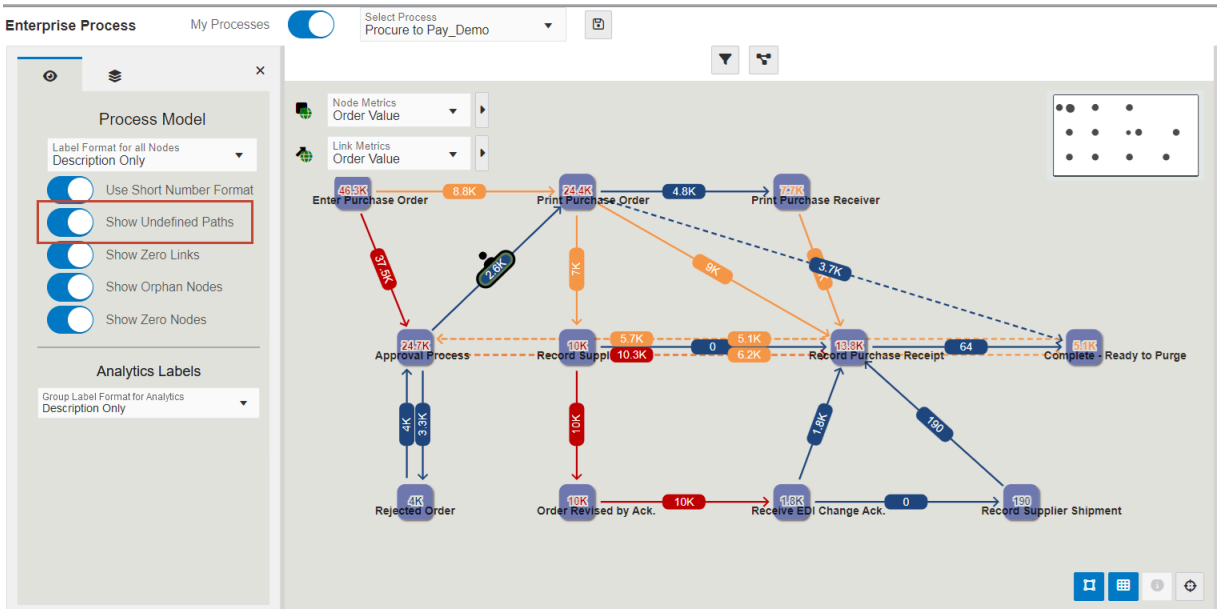
     Example: User Short Number Format Enabled

     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.

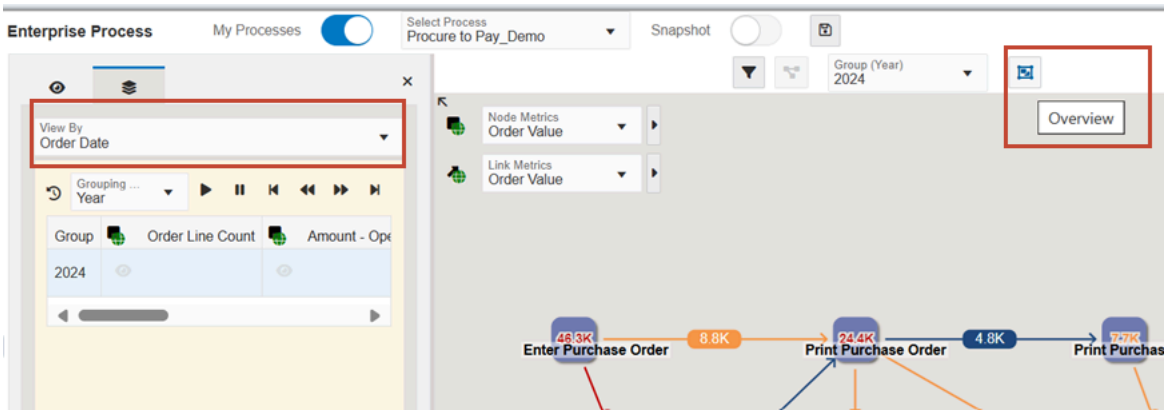
The system displays the changes on the enterprise process diagram and analytics tabs when you make changes in the Analytics Options pane.

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.

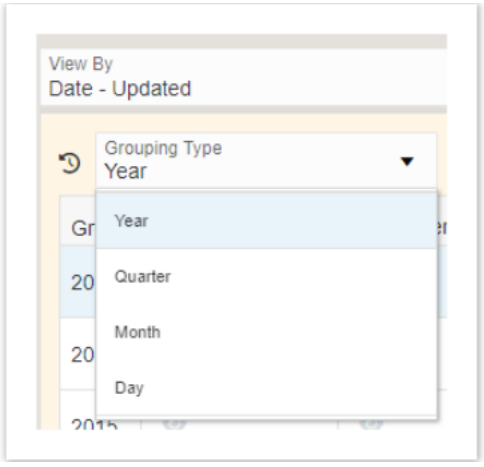



**Timeline View for Date and UTime Data Types**

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:

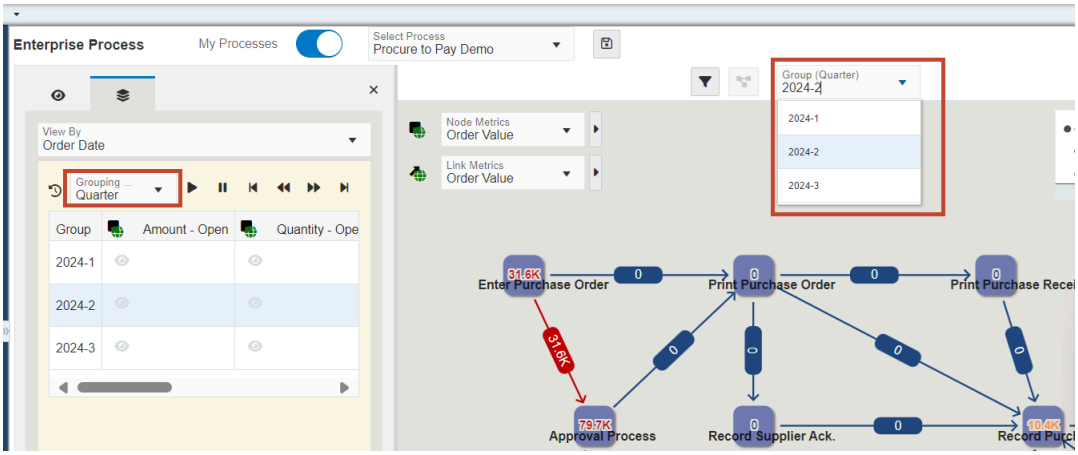
a. Select any of these options from the Grouping Type drop-down list: Year (calendar year), Quarter (calendar quarter), Month, and Day.




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.

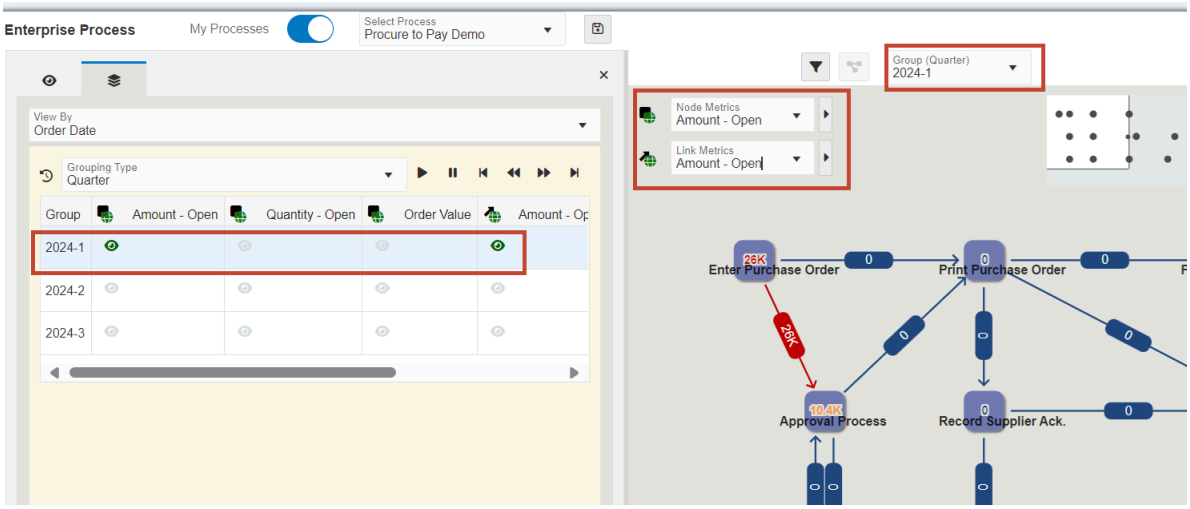


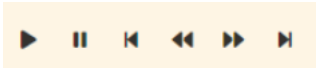

C. To analyze the enterprise process using different values, click the **Select Metrics** icon on the rows to select a value for the Node and Link Metrics. The system changes the values accordingly in the Node Metrics and Link Metrics fields and displays the changes on the enterprise process diagram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

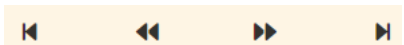
The system displays a Domain View indicator when you select a data type other than Date or UTIME the View By drop-down list.

You can use the following options to analyze the process:

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

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

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

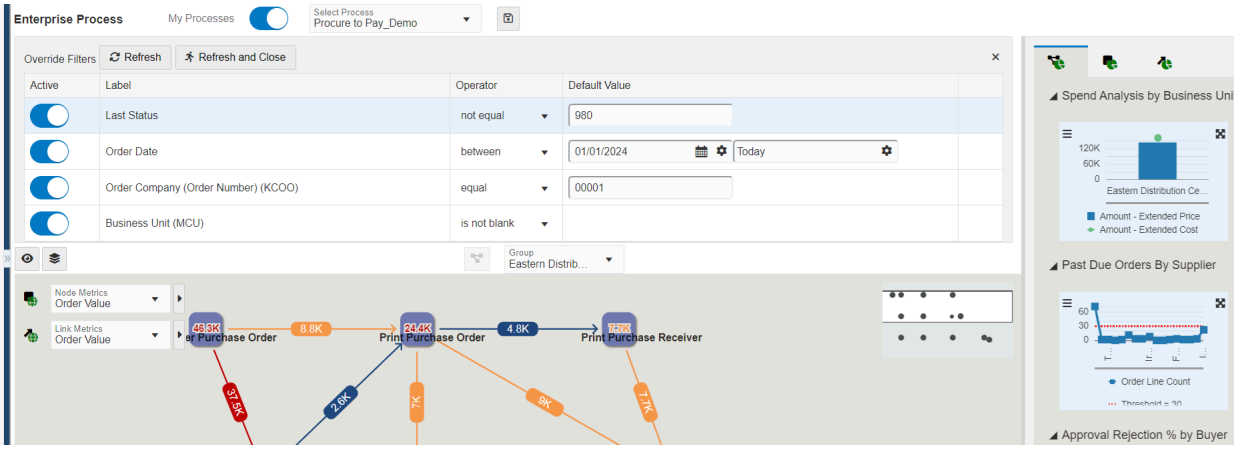
3. Click the **Begin**, **Previous**, **Next**, and **End** icons  to view the Node and Link metrics of different groups.
4. Click the **Hide View Options** icon (X) to close the Analytics Options pane.

# Using the Show Filter Options

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

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

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




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

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

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

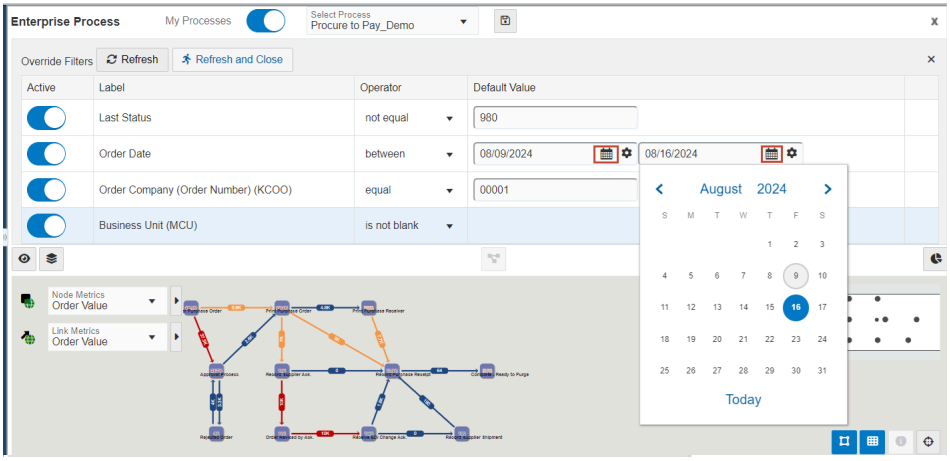
4. In the Default Value field, either enter a value or select a date value.

   The system supports the following filter values:

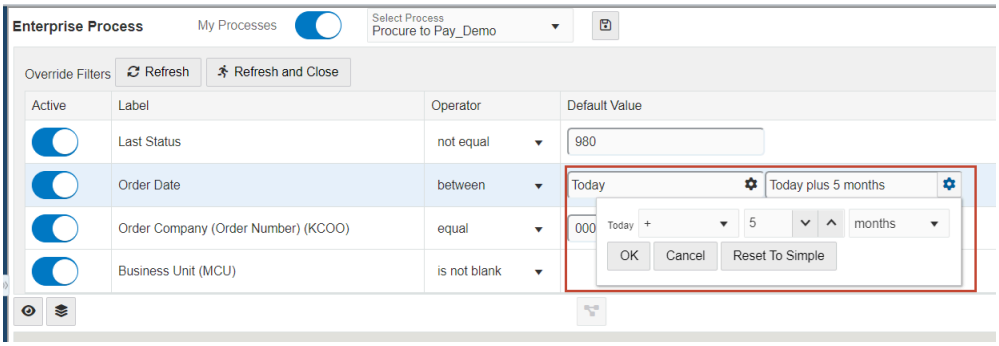
   - No value is required for "is blank" and "is not blank" operators.
   - Allow list editing for "in list" operator (system supports tab key, auto-clean empty entries, keep at least one entry). When you type the last entry, the system automatically appends a new empty input as the last entry.
   - Two-value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

   The system supports the following calendar and special value controls:

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




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




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

5. (Tools Release 9.2.26.0) To change the request timeout value, click the **Configure Request Timeout** icon. The system displays the Configure Request Timeout window along with the default timeout value of 30 seconds. Enter the required value, and click **Refresh and Close**.

   The time allocated for a request to be processed on the server is determined by this value.

6. 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 9.2.26.0) The Enterprise Process Modeler enables you to access the Data Browser and Query Detail windows from the nodes and links. See *Using the Drill into Data Option (Release 9.2.26.0)* and *Using the Show Query Details Option (Release 9.2.26.0)*.

(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*.

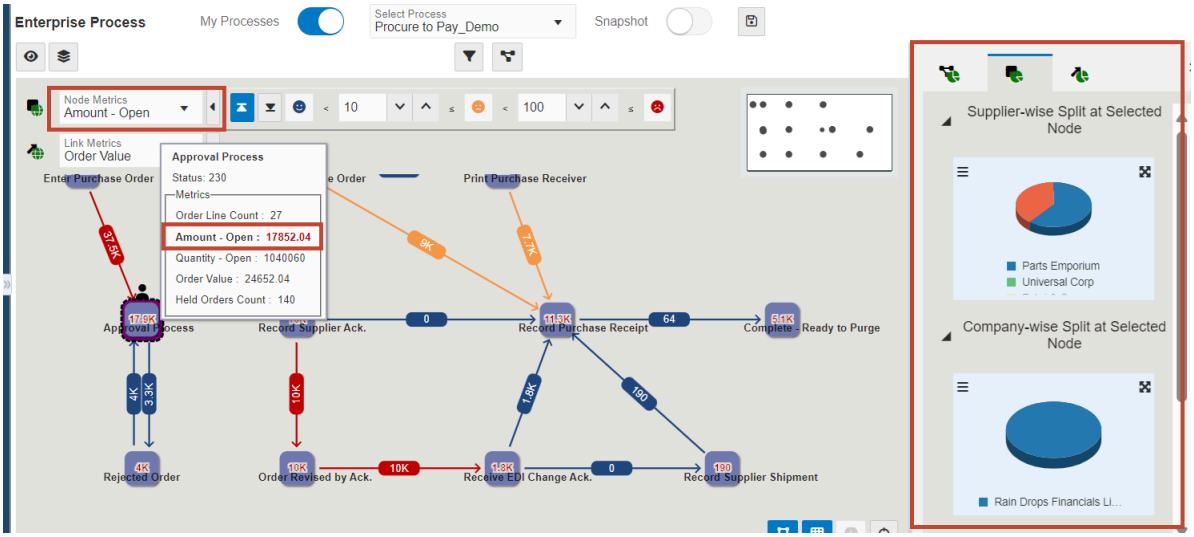
1. Click the **Node Metrics** drop-down list (in the model pane) and select the required value.
2. To make changes to the threshold values of the nodes, click the **Expand Threshold Configurator** icon, and click the **Ascending** or **Descending** icons, or enter the values in the fields. You can determine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

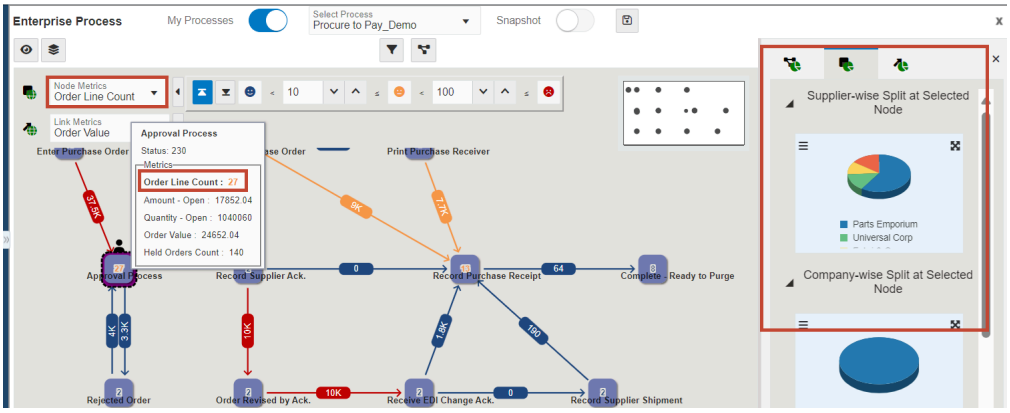
   In the following example, Order Value is selected from the Node Metrics drop-down list. On the hover form, the selected field is displayed in bold and its value (24.7K) is displayed in red on the node, and on the hover form.

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.



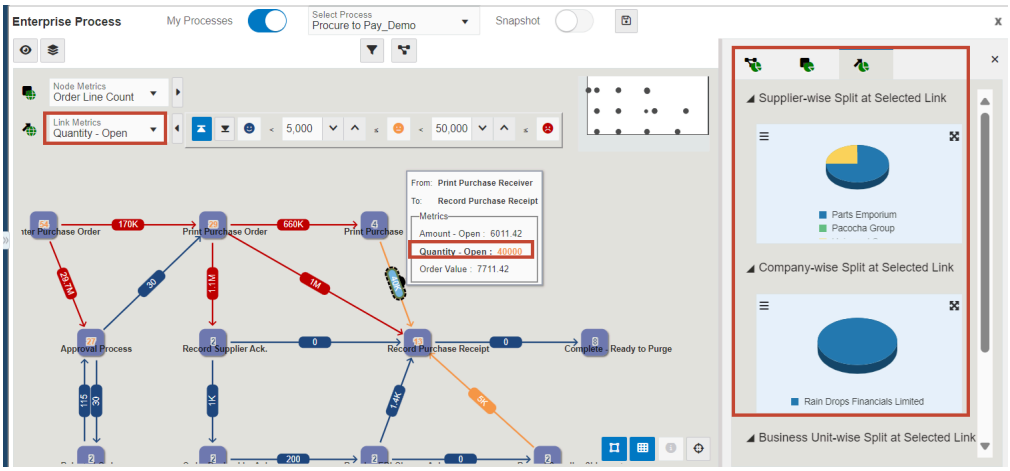

In the following example, Order Line Count is selected from the Node Metrics drop-down list. On the hover form, the name is displayed in bold, and its value (27) is displayed in orange because it is indicating the warning status. The corresponding metrics and details for Order Line Count are displayed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

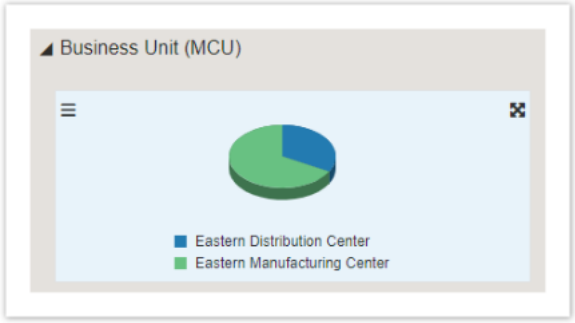
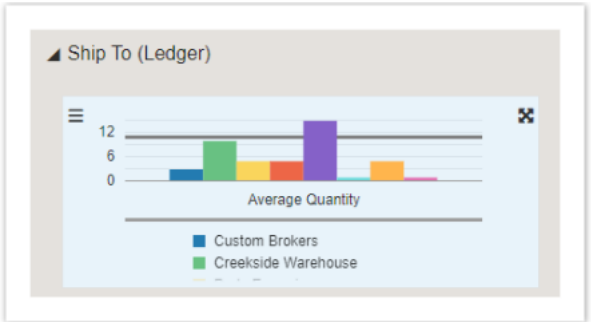
- **Process Analytics**: Displays the analytics charts for the enterprise process.
- **Node Analytics**: Displays the analytics charts for the selected node.
- **Link Analytics**: Displays the analytics charts for the selected link.

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.

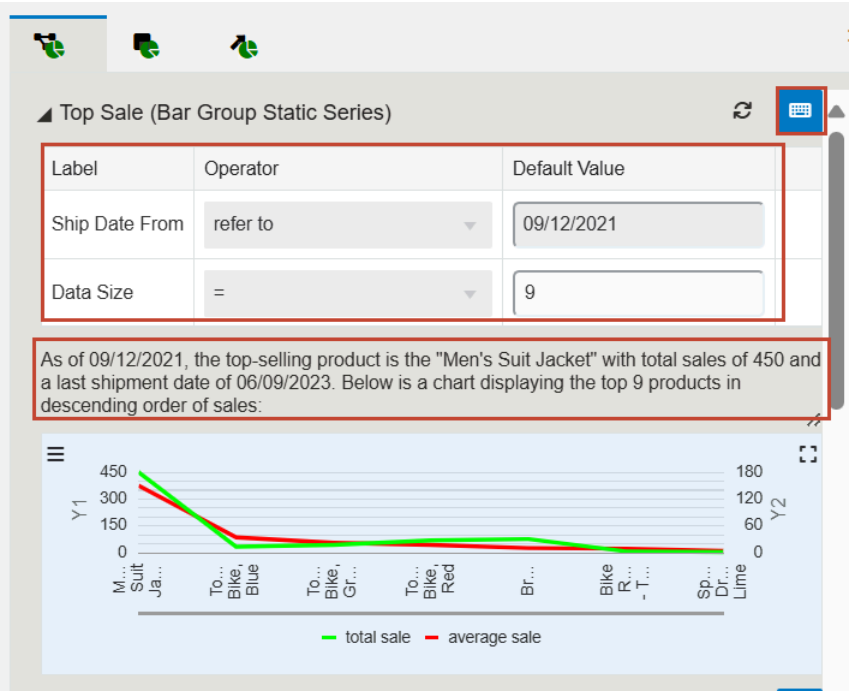
(Release 9.2.26.2) If you select the **Node Analytics** or **Link Analytics** tab without first selecting a node or link, the system displays a message (*"Click a node to see analytics"* or *"Click a link to see analytics"*) indicating that you must select a node or link to view analytics.

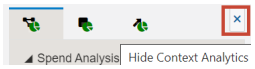
The system displays the **Click to set the context to the process level** icon when the Node Analytics or Link Analytics tabs are displayed on the right. Click this icon to view the Process Analytics tab.

The Process Analytics tab displays the charts based on how the process designer created them in Enterprise Process Manager. The charts displayed in the Node Analytics and Link Analytics tabs are based on the aggregation operator types.

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

(Release 9.2.26.0) If the analytics charts on the Process Analytics, Node or Link Analytics tabs, are built using an orchestration or a logic extension, the system displays the Show Inputs icon , enabling you to edit the default values. You can edit the values and click **Refresh** to view the changes in the description and on the chart.



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

and Show Context Analytics

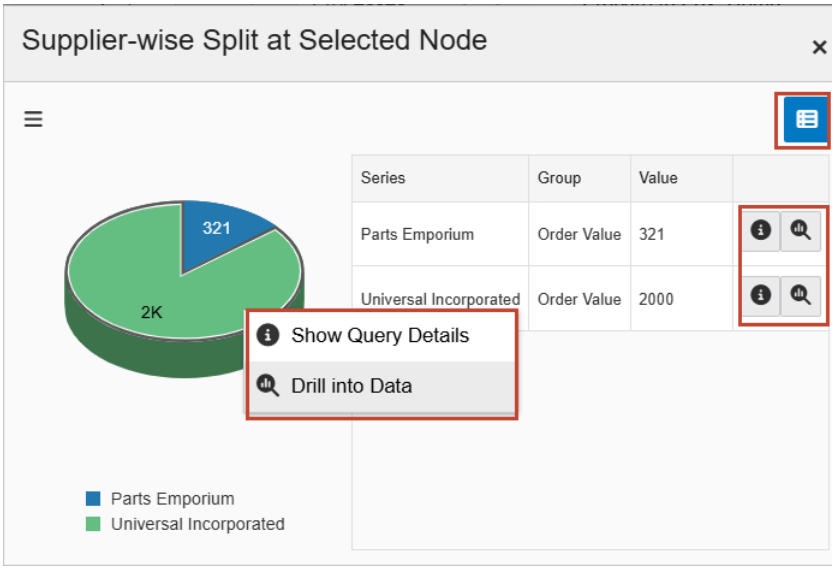
icons. You can click the arrow icons to collapse or expand the individual charts in the analytics tabs. Also, you can click the Maximize

or Minimize

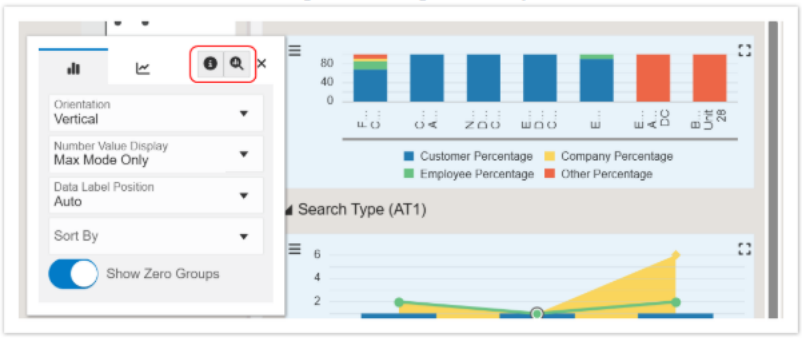
icons on the charts to view them in maximized or minimized modes.

**Maximized Mode of Charts**

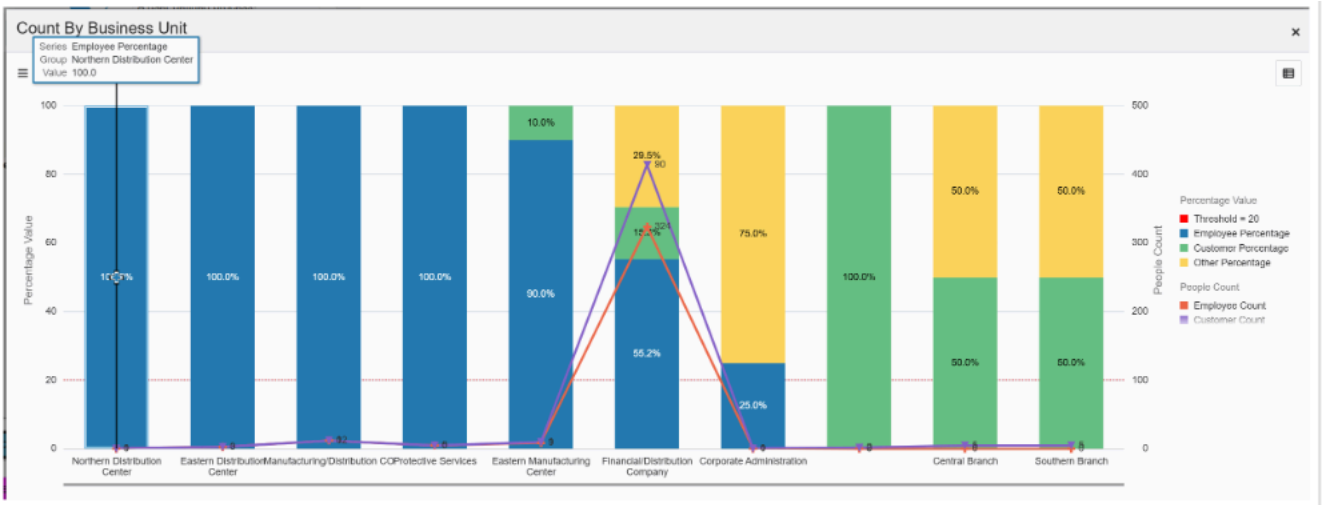
(Tools Release 9.2.26.0) In the maximized mode of the charts, you can click the **Toggle Table View** icon to view the list of Series, Groups, and Values of the chart in a tabular format. You can click the **Show Query Details** and **Drill into Data** icons on the rows to view the Query Details and the Data Browser windows. Additionally, you can right-click the charts to access these windows. To close the table view, click the Toggle Table view icon.




Starting with Tools Release 9.2.26.0, the Configure window displays the Chart Configuration and Series Configuration tabs. The fields displayed on these tabs depend on the chart type (bar or pie chart) and source (aggregation, orchestration, or logic extension) of the analytics charts. The configure window also displays the Show Query Details and Drill into Data icons.




(Release 9.2.26.2) For any analytic chart (table, business view, logic extension, or orchestration based analytics) with at least one series configured with **Dual Y** at design time, the legend is split into two sections labeled with the chart's **Y-Axis Title** and **Dual Y-Axis Title**. **Non–Dual Y** series are listed in the first section, and **Dual Y** series are listed in the second section as shown in the following example:




See

- *Using the Drill into Data Option (Release 9.2.26.0)*
- *Using the Show Query Details Option (Release 9.2.26.0)*

### Process Analytics Tab

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

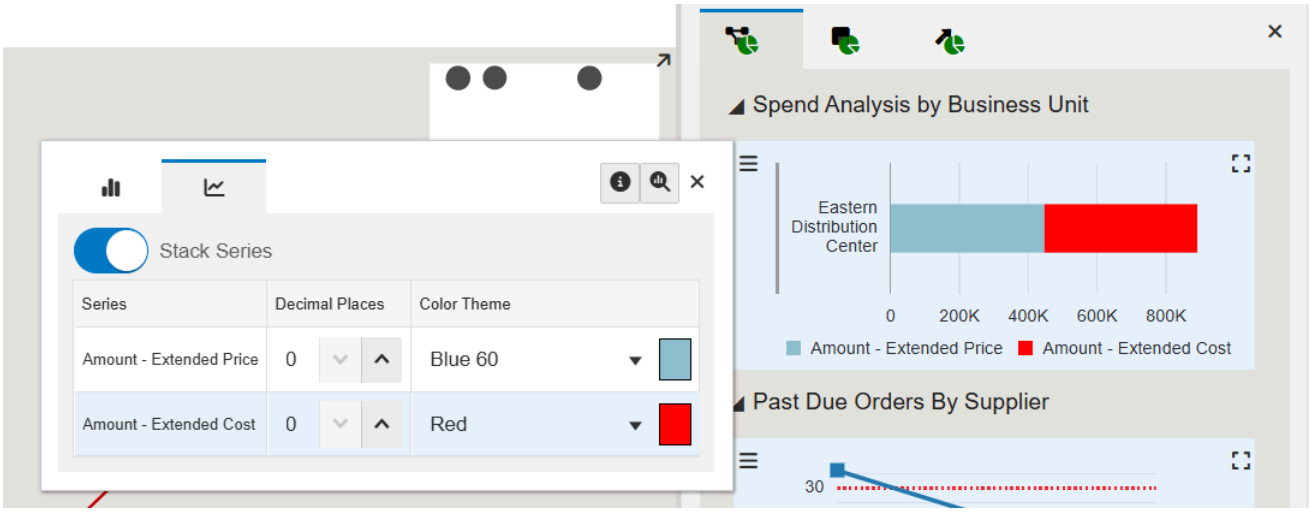
1. On the chart, click the **Configure** icon

   ☰

   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.

**Note:** Starting with Tools Release 9.2.26.0, the **Stack Series** option is displayed on the Series Configuration tab (instead of Chart Configuration), and this option is available only for bar, line, area, and combined charts (not the pie charts). You can select the values for the Decimal Places and colors in the Color Theme fields for the Series.



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

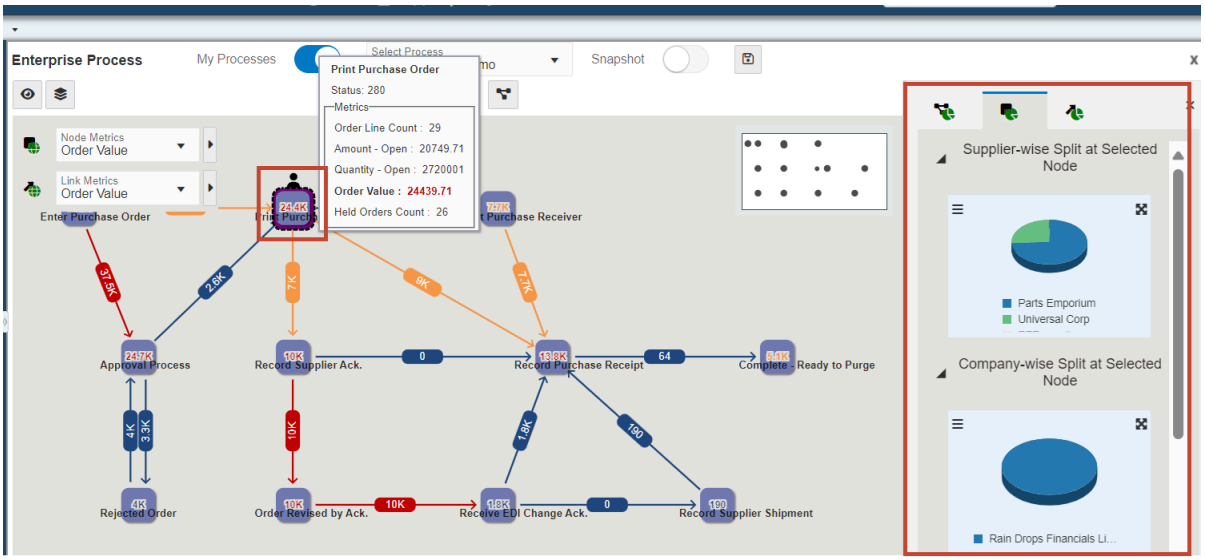
3. On the Chart Configuration tab of the Configure window, you can set the values for the Number Value Display, Data Label Position, Sort By, and Show Top fields. You can also enable or disable the Show Zero Groups option.
4. Click **Close** to close the Configure window.
5. Hover over the colors on 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 ☰ to review the node analytic fields and make the required changes.
3. 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 ☰ to review the link analytic fields and make the required changes.
3. Hover over the colors on the charts to analyze the details.

# Analyzing Snapshots

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 and compare it to other snapshots.

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

## Analyzing Snapshots Using the Snapshot Analysis Pane (Tools Release 9.2.26.2)

You can right-click a node or link, then select **Analyze Snapshots** to open the snapshot analysis pane at the top of the window. The pane displays bar charts along with the snapshot data that you can use to review, analyze, and compare processes.

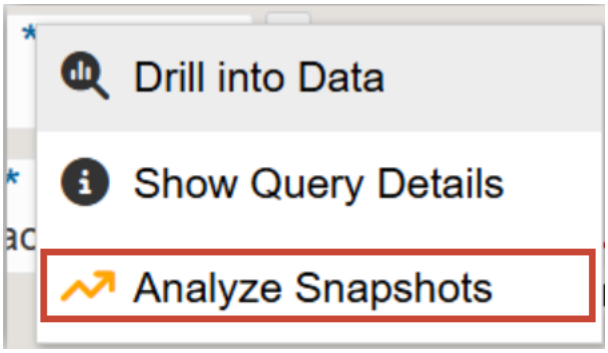
You can analyze a node or a link metric of an enterprise process in the Snapshot Analysis pane. When you select **Analyze Snapshots** for a node, the pane displays the selected node metric for that node across the snapshots. When you select **Analyze Snapshots** for a link, the pane displays the selected link metric for that link across the snapshots.

When the Snapshot Analysis pane is open, the UDO Manager, Snapshot Manager, and Compare View are hidden.

To analyze snapshots:

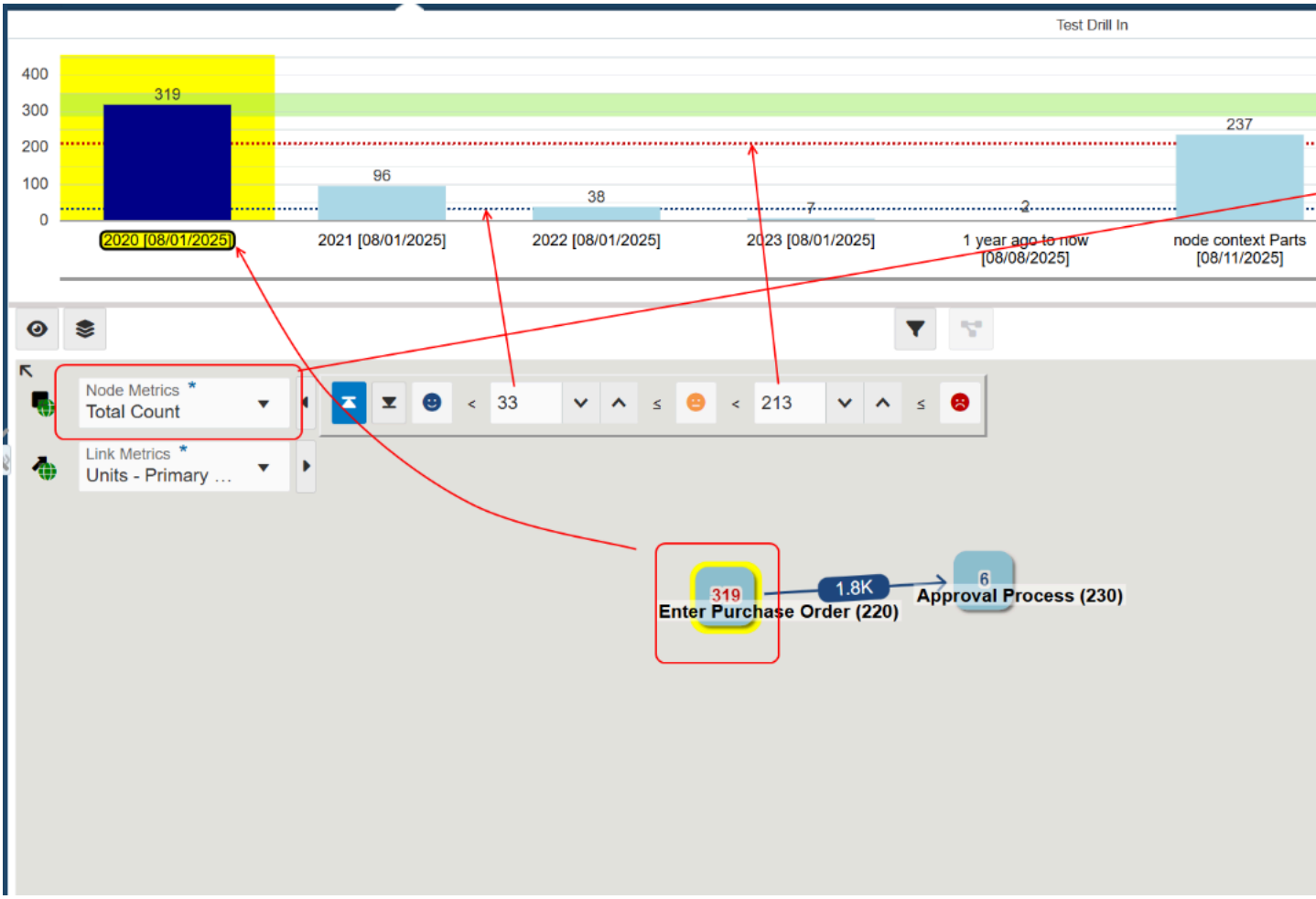
1. Right-click a node or link and click **Analyze Snapshots**.

   **Note:** The Analyze Snapshots option is disabled when no snapshots are available for the selected enterprise process.



2. In the snapshot analysis pane, data for the selected node or link appears across snapshots. Hover over a bar in the chart to review the following:

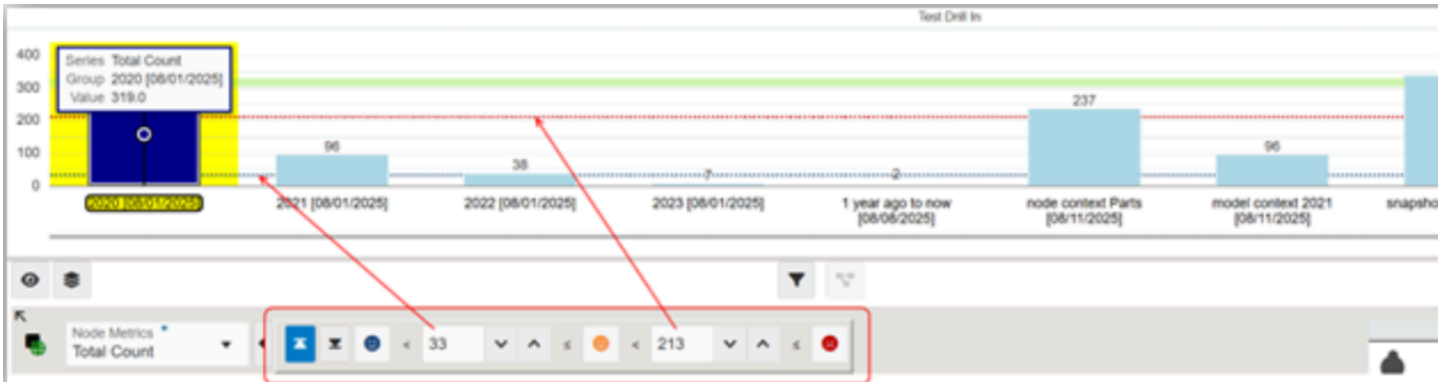
   - **Series:** Indicates the metric name that the chart displays (for example, Total Count). The Series matches the metric you selected in Node Metrics or Link Metrics.
   - **Groups:** Indicates the snapshot name and snapshot date. The currently selected group is highlighted in yellow.
   - **Values:** Displays the metric value for the selected node or link metric.




**Note:** The snapshot analysis pane displays bar charts only. You can resize it vertically, drag the horizontal bar located at the bottom edge of the pane (between the snapshot analysis pane and the model pane) to your preferred height.

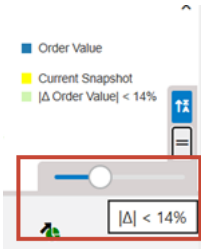
3. Click a bar or a group label to open the corresponding snapshot in the model pane.

4. Use **Switch threshold lines** to show (default) or hide threshold lines. When enabled, the chart displays two threshold lines in different colors (red and blue) based on the settings in the Threshold Configurator of a node or a link in the currently open snapshot.

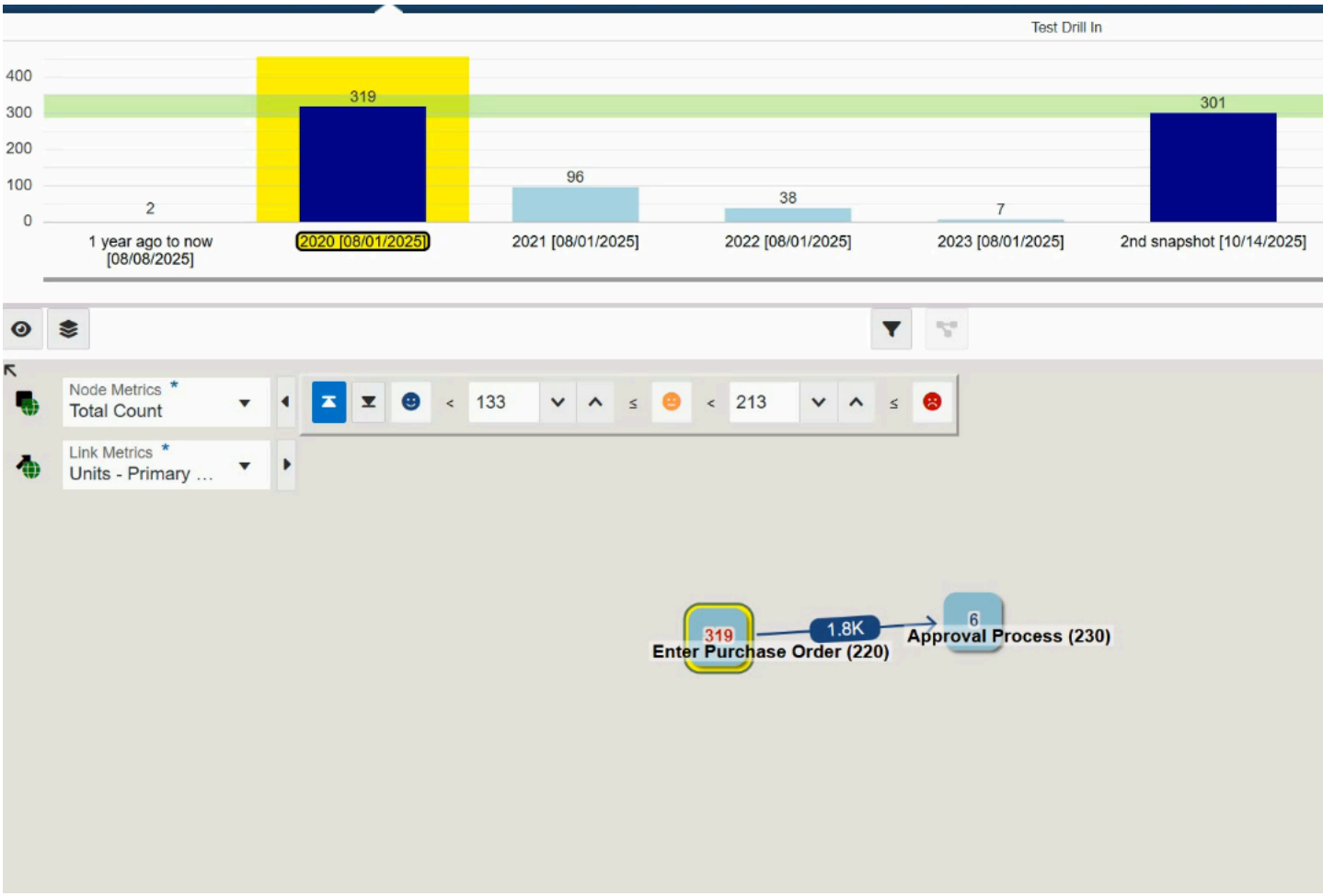



5. Use **Switch sorting** to sort groups by Label or Creation Time .

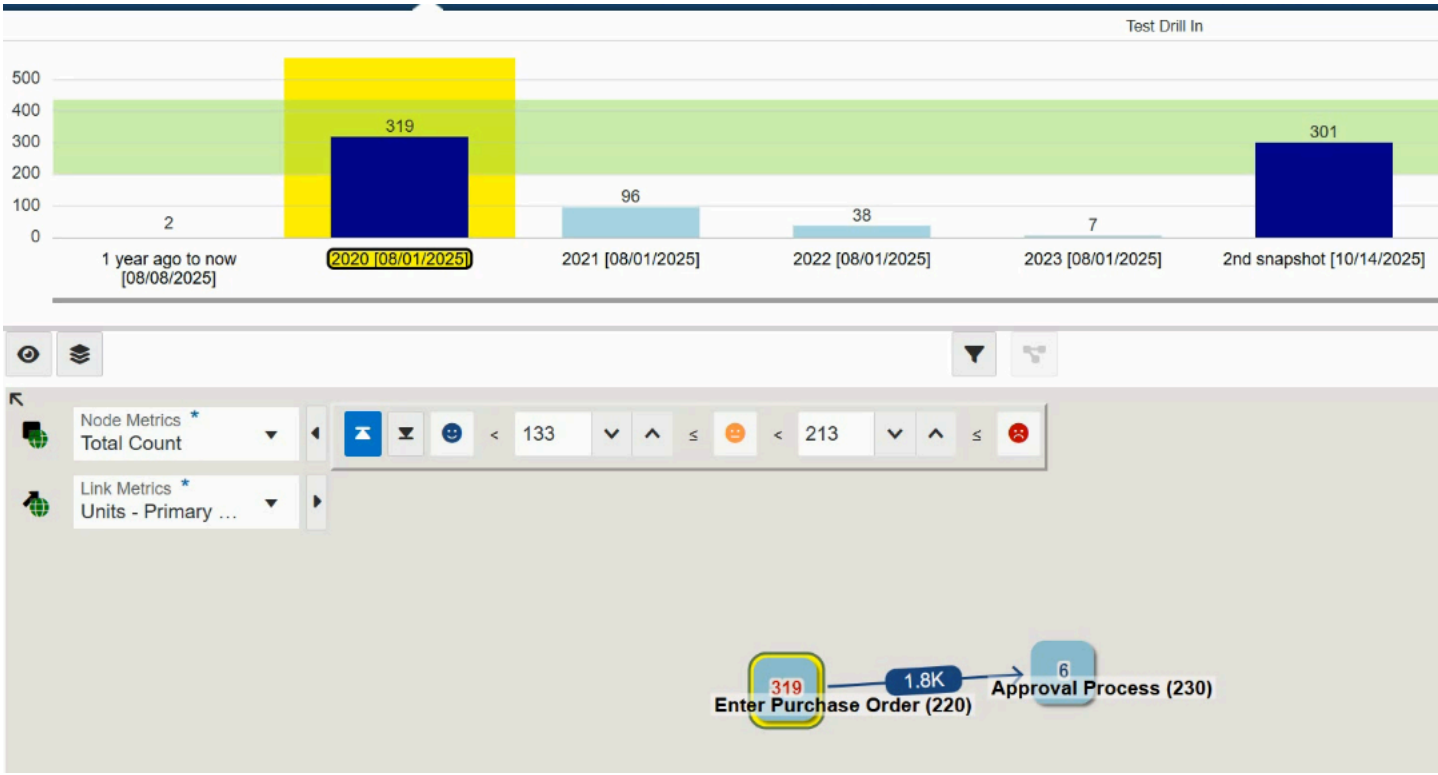
6. Move the percentage threshold slider (0%–40%) to set the percentage and display the corresponding reference area on the chart for the selected node or link metrics.




In the following example, The Enter Purchase Order node is selected in the model pane and Total Count is selected in Node Metrics. The reference area for Total Count is represented by the green horizontal bar on the snapshot analysis pane.

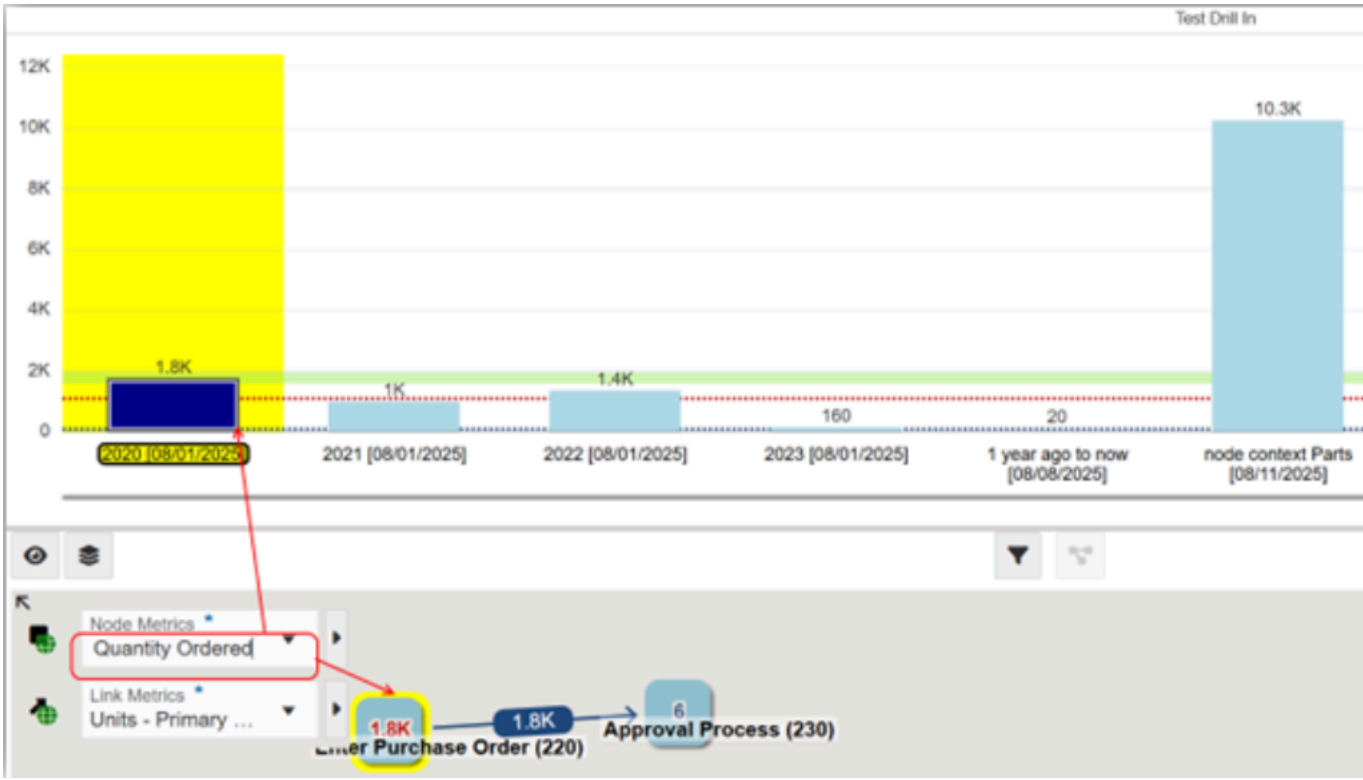



In the following example, the percentage threshold slider (0%–40%), is set to 37% and the Order Count reference area is increased in the snapshot analysis pane (represented by the green horizontal bar).


Test Drill In
500
400
300
200
100
0
2
319
96
38
7
301
1 year ago to now [08/08/2025]
2020 [08/01/2025]
2021 [08/01/2025]
2022 [08/01/2025]
2023 [08/01/2025]
2nd snapshot [10/14/2025]
Node Metrics *
Total Count
Link Metrics *
Units - Primary ...
133
213
319
Enter Purchase Order (220)
1.8K
6
Approval Process (230)

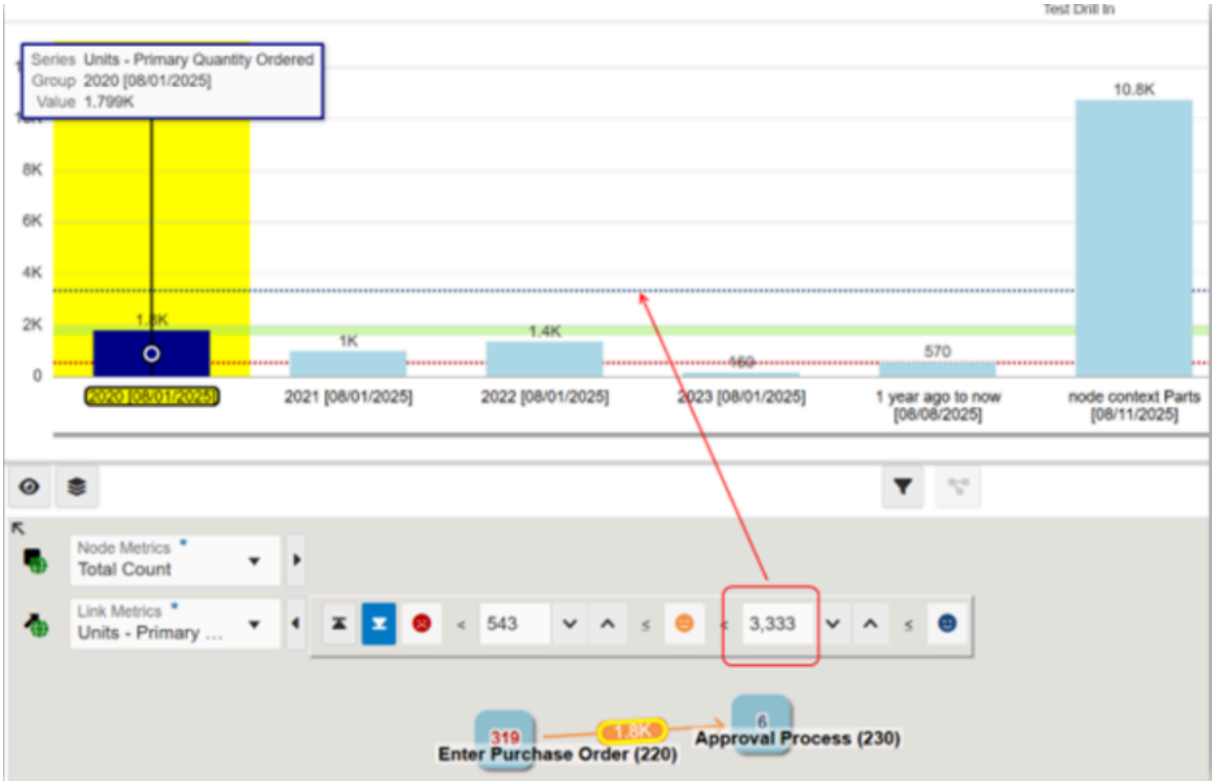
7. In the model pane, select different metrics and thresholds, then compare and analyze the results in the snapshot analysis pane.

   - The chart in the snapshot analysis pane updates to reflect the metrics selected in the model pane.




   - Select another node or link to analyze a different item. The system moves the yellow outline to the newly selected item and refreshes the chart for that item.

- If you change the threshold for the highlighted metric of the current node or link, the system updates the chart on the snapshot analysis pane based on the context of the currently analyzed node or link.




8. Click **X** to close the snapshot analysis pane.

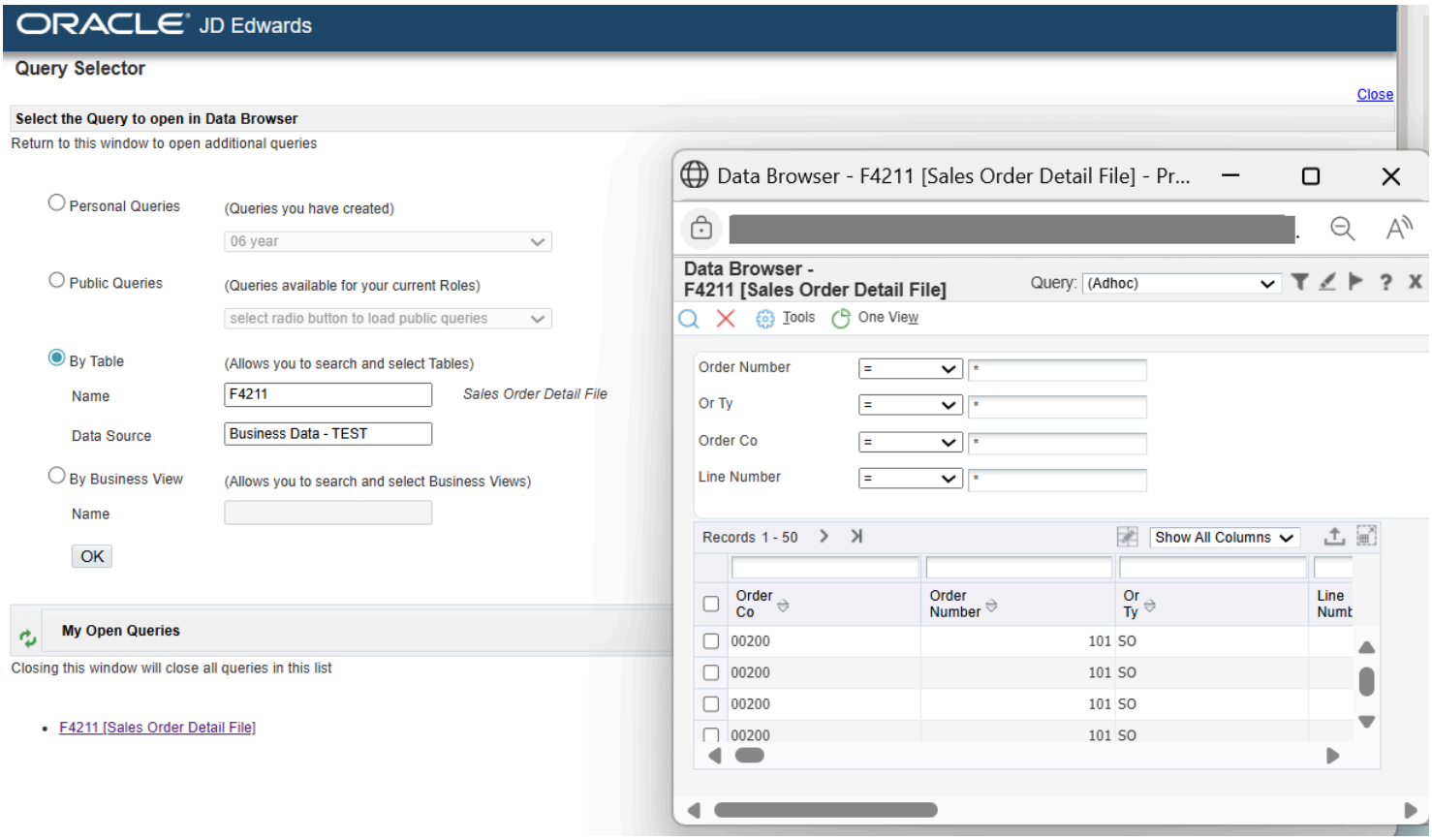
# Using the Drill into Data Option (Release 9.2.26.0)

The Drill into Data option enables you to view the details and business data that is behind the metric badges and KPI analytic charts in the runtime mode.

**Note:** The Drill into Data option is not available in the snapshot mode. Also, this option is not supported on iPad.

When you click the Drill into Data option , the system displays the Query Selector and the Data Browser windows. The query conditions and the table or view are determined by the context of the node and link. These are not provided in the Data Browser query selector. The system also displays a Data Browser window to retrieve raw data based on all filters relevant to the current context.

The Data Browser window enables you to search for a specific table or business view data.



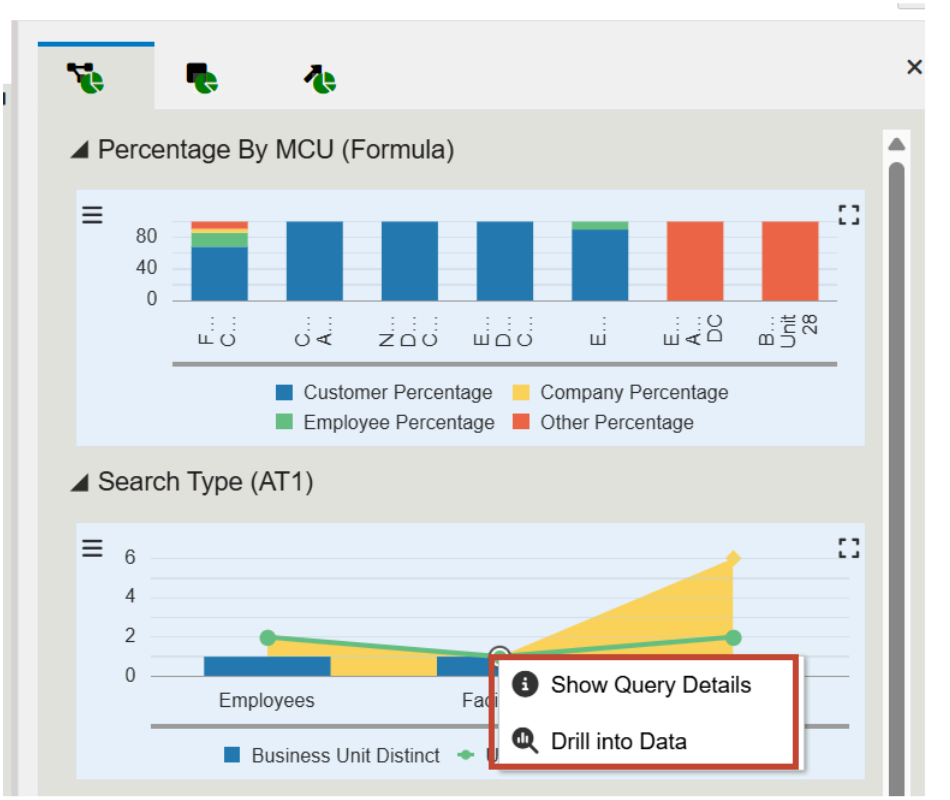

When you open multiple Data Browser windows, the system retains only one Query Selector window, which can be used again to specify the data source.

See *Viewing the Data in Tables and Business Views.*

**Note:** Your system administrator has to setup security for you to view the Data Browser. See *Managing Data Browser Security.*

The Enterprise Process Modeler enables you to access the Data Browser window for the nodes, links, and analytics tabs. You can access the Data Brower window by using these steps:

- Right-click the node or a link and click **Drill into Data**.
- On the Process Analytics, Node Analytics, and Link Analytics tabs, click the **Configure** icon, and then click the **Drill into Data** icon.
- Right-click the required data on the charts in the analytics tabs and click **Drill into Data.**




> **Note:** The Drill into Data feature is available only for the Table input type on the analytics charts. This feature is not available for the Logic Extensions and Orchestrations input types.

- On the Query Detail window, click the **Drill into Data** button.

  See *Using the Show Query Details Option (Release 9.2.26.0)*.
- On the maximized window for link or node analytics charts, click the **Toggle Table View** icon, and then click the **Drill into Data** icon.

# Using the Show Query Details Option (Release 9.2.26.0)

The Show Query Details option enables you to view the details of the table selections, returns, inputs and outputs, summary of the queries, and filter details that are used to generate the metrics on the nodes, links, and analytics charts.

> **Note:** The Show Query Details option is not available in the snapshot mode.

The Enterprise Process Modeler enables you to access the Query Details window for the nodes, links, and analytics tabs in the runtime mode. You can access the Query Details window by using these steps:

- Right-click the nodes or links and click **Show Query Details**.
- On the Process Analytics, Node Analytics, and Link Analytics tabs, click the **Configure** icon, and then click the **Show Query Details** icon.
- Right-click the required data on the charts in the analytics tabs and click **Show Query Details.** You can also double-click the data to open the Query Details window.
- On the maximized window for link or node analytics charts, click the **Toggle Table View** icon, and then click the **Show Query Details** icon.

The Query Details window displays the details based on the Table, Orchestration, and Logic Extension type.

**Table Type**

When you click the Show Query Details option for a Table type on the nodes, links, or analytic charts, the system displays the Query Details window with the following details:

**Selections:** This section displays details about as the Table Name, Selected Series, and Selected Group.

**Returns:** This section displays details about the Aggregation, Column, and Result.

**Filters:** This section displays the filters used for displaying the metrics and KPIs. The indicator icons are displayed to indicate the filters. For example, Context , Chart Item , Runtime Filter , Design Process Option , and so on.

In the Filter section of the Query Details window of the nodes, the system displays one status code (Last) and for the links, the system displays two Status Codes (Last and Next). Additionally, the system displays the Chart Item filter details for the node and link analytic charts.

**Orchestration and Logic Extension Types**

When you click the Show Query Details option for an Orchestration or Logic Extension type on the analytic charts , the system displays the Query Details window with the following details:

**Selections:** This section displays details such as the Logic Extension or Orchestration Name, Selected Series, and Selected Group.

**Outputs:**This section displays details of the Data Structure (Parent Array), Data Structure, and Result.

**Inputs:** This section displays the input details such as Label, Data Structure, and Values. The indicator icons are displayed to indicate the labels. For example, the User Input icon is displayed to indiate that the data is from the user input.

# 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*.

# 4 Using Split View in Enterprise Process Modeler (Release 9.2.26.0)

## Understanding Split View in Enterprise Process Modeler

You can use the Split View option in the Enterprise Process runtime mode to add multiple adjacent panes of different enterprise processes and analyze them. You can also compare the same enterprise processes using different filter settings or thresholds; for example, compare two time periods or business units of the same enterprise process. Alternatively, you can compare a process with a snapshot of the same process. You can view a summary of the differences and identify inefficiencies or bottlenecks.

Split View enables you to:

- Add enterprise processes side by side and analyze them.
- Add the same enterprise process side by side, specify different filter settings and compare them.
- Compare snapshots with other snapshots of the same enterprise process.
- Compare enterprise processes with snapshots of the same enterprise process.
- Compare the differences in metrics between enterprise processes or snapshots in a table view.
- Save the split views as a preference.

## Using Split View in Enterprise Process Modeler

To display adjacent panes of enterprise processes:

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 first process listed in the Select Process drop-down list.
3. Click the **Create a new Split View** icon .

   The system displays a new window along with the first enterprise process (from the Select Process drop-down list) on the right.

   > **Note:** You can remove a process by clicking the Remove this Split View icon . You can add any number of enterprise process panes side by side. However, it is recommended not to add more than three panes for clarity and easy navigation.

4. In the spilt view panes, select the processes you want to compare from the respective **Select Process** drop-down lists.

   When you select the same enterprise processes to compare, the system displays the Toggle Compare View mode icon .

   > **Note:** You can select specific processes, add them to the split view panes, and change the filter settings of the enterprise processes to analyze different processes.

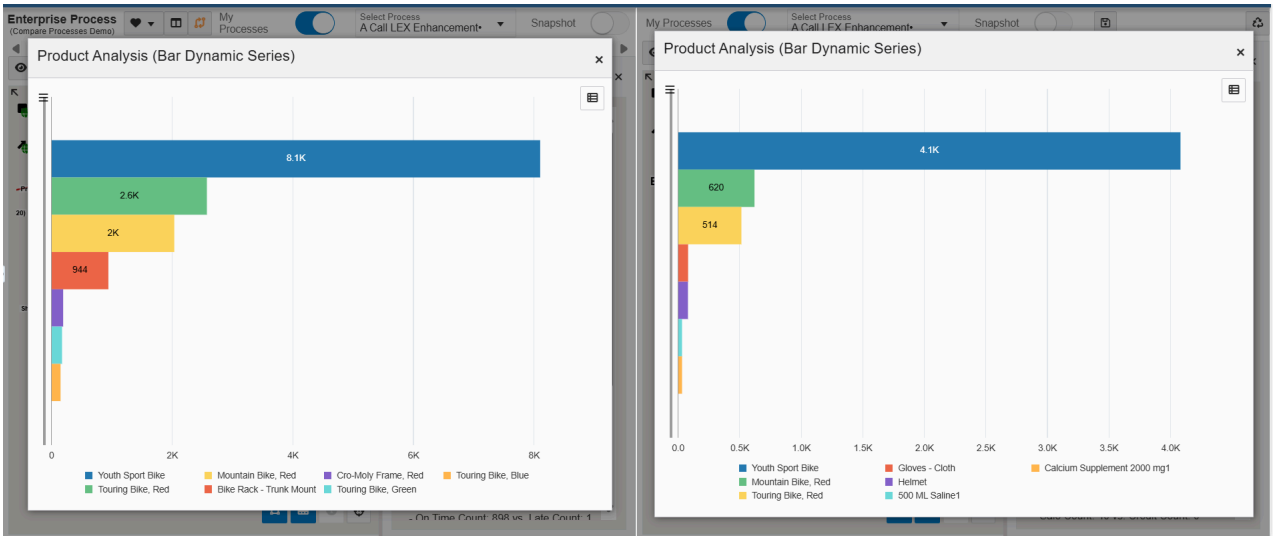
5. Change the filter settings and thresholds as per your requirements to compare the enterprise processes.

   In the split panes, you can perform the filter changes and operations, such as changing the display and analytics options, changing the nodes and link metrics, saving, or selecting a snapshot, and so on .

   You can maximize the charts on the Process Analytics, Node Analytics, or Link Analytics tab, and analyze them.

   See *Analyzing an Enterprise Process*.

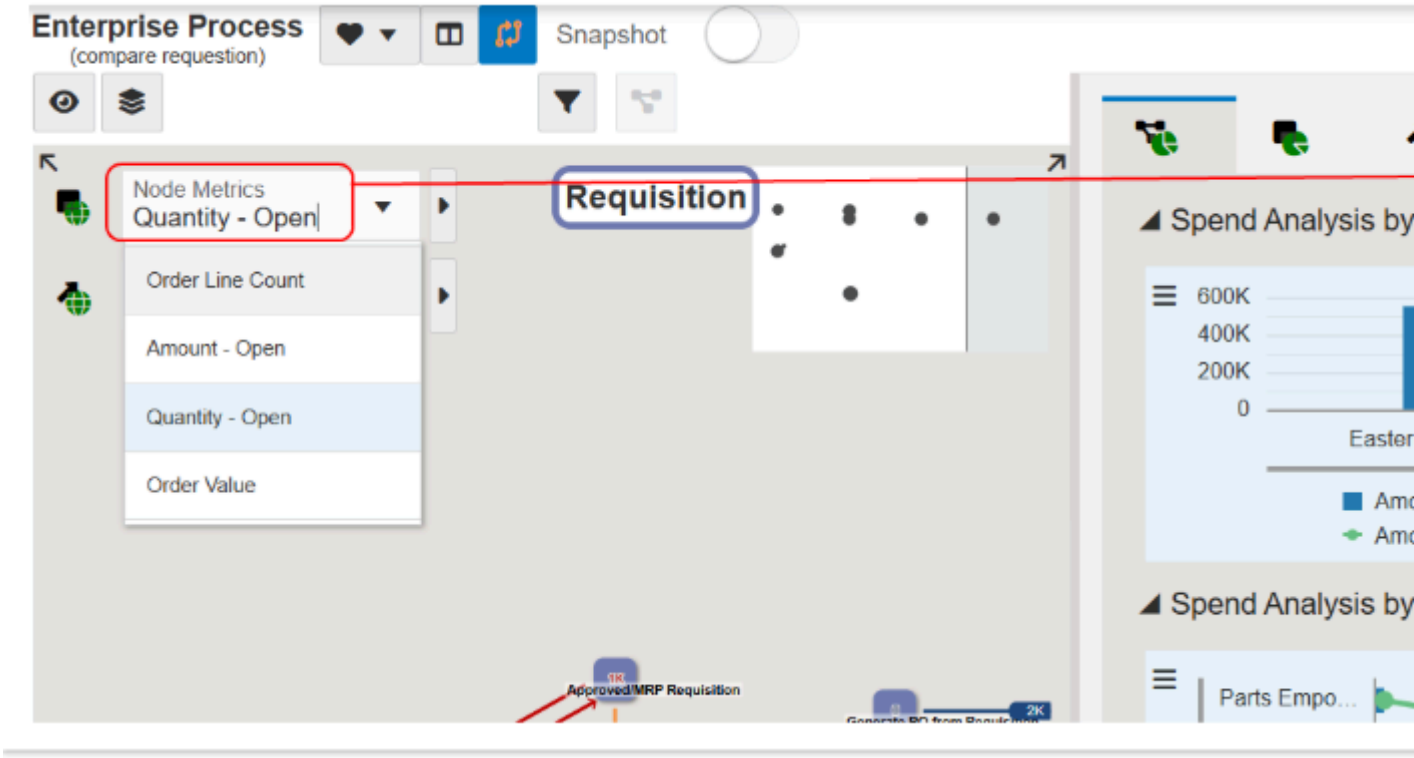
   For example, the following screenshot shows the maximized bar charts for Product Analysis.



6. To view the comparison summary between the two instances of the same processes, click the **Toggle Compare View** mode icon .

   The system displays the **Node Level Summary for Comparison** and **Link Level Summary for Comparison** fields along with the values selected in the Node Metrics and Link Metrics fields and a percentage threshold value as 10 by default on the process on the left. You can edit this percentage threshold value.

   **Note:** When you make changes to the values in the Node and Link Metrics columns on the left, the system updates the Node Level Summary for Comparison and Link Level Summary for Comparison fields on the right.

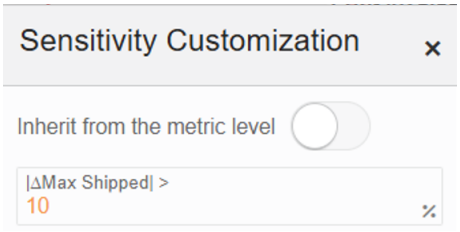



A highlight is displayed around the nodes and links in the enterprise process diagram when there is a significant difference beyond the specified percentage threshold for the link and node metrics.

7. Hover over the nodes and links of the enterprise process diagram on the right pane, and click the indicator icon.

On the Sensitivity Customization window, the **Inherit from the metric level** option is enabled by default, and the nodes and links fetch the threshold values from the **Node Level Summary for Comparison** and **Link Level Summary for Comparison** fields.

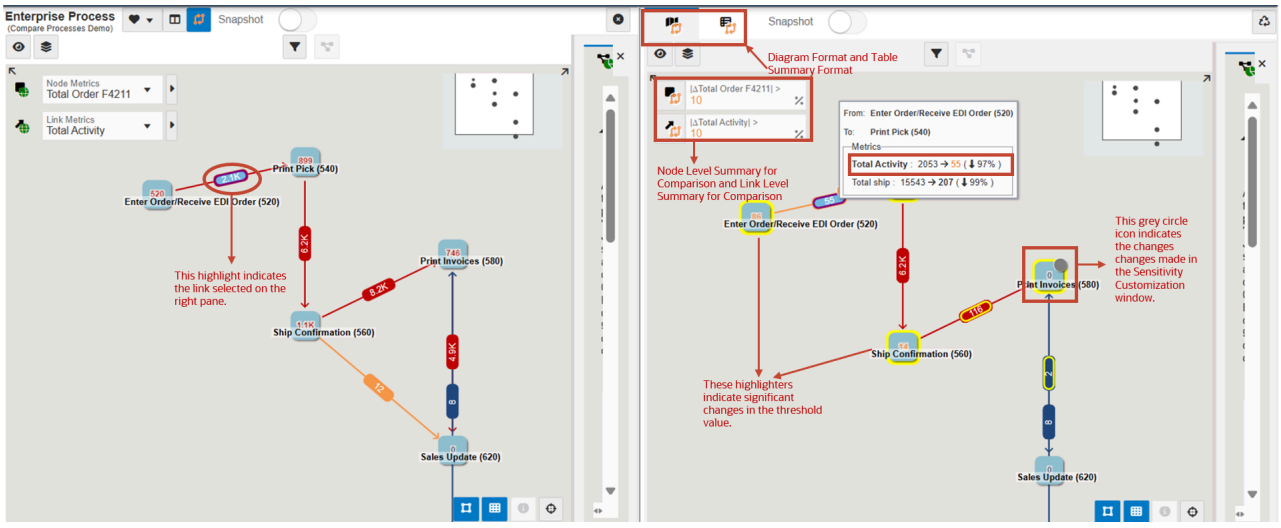
Disable the **Inherit from the metric level** option to edit the percentage threshold value specific to the node or the link. Close the Sensitivity Customization window to save your changes.




When you make changes in the Sensitivity Customization window for a node or a link, the system displays a grey circle icon

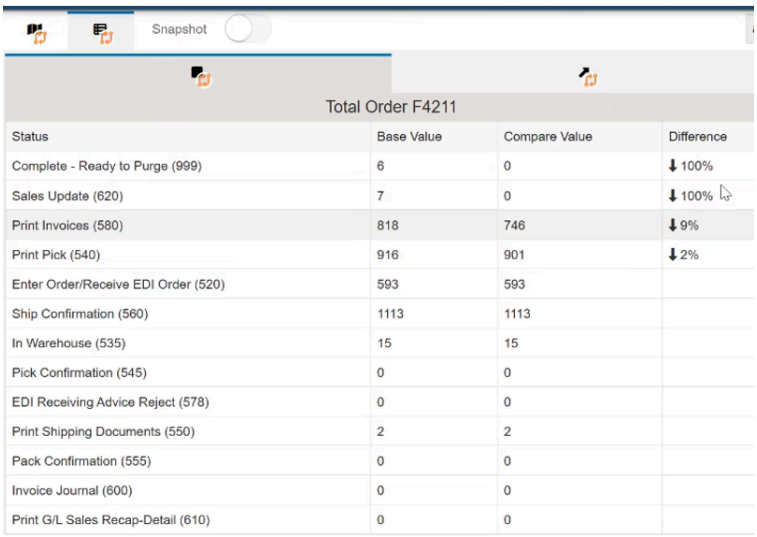
on them to indicate the changes. You can hover over the grey circle icon and click to open the Sensitivity Customization window and modify or view your changes.

For example, in the following screenshot, the hover text of the link displays a 55% decrease in Total Activity. The system also highlights the same link on the enterprise process on the left to indicate the compared link. The highlighters are displayed around the nodes and links of the compared process on the left to indicate a significant difference in the threshold value. On the Print Invoices node, a grey circle icon is displayed to indicate the changes made in the Sensitivity Customization window.



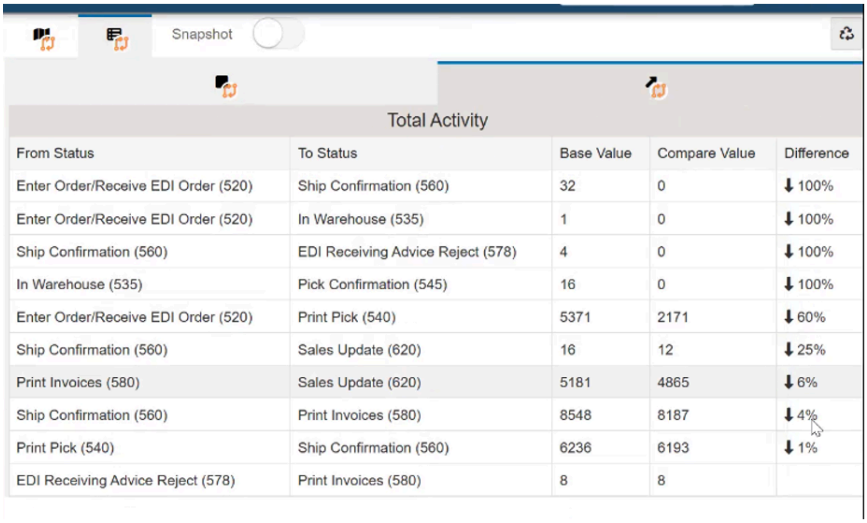
8. To view the summary of comparison in a table format, click the **Table Summary Format** icon . Click the Current Node Metric and Current Link Metric tabs to review the comparative data.

**Current Node Metric Tab:** Displays the list of statuses present in the enterprise processes diagram along with their Base Value, Compare Value, and Difference (by percentage).




| Status | Base Value | Compare Value | Difference |
|---|---|---|---|
| Complete - Ready to Purge (999) | 6 | 0 | ⬇ 100% |
| Sales Update (620) | 7 | 0 | ⬇ 100% |
| Print Invoices (580) | 818 | 746 | ⬇ 9% |
| Print Pick (540) | 916 | 901 | ⬇ 2% |
| Enter Order/Receive EDI Order (520) | 593 | 593 | |
| Ship Confirmation (560) | 1113 | 1113 | |
| In Warehouse (535) | 15 | 15 | |
| Pick Confirmation (545) | 0 | 0 | |
| EDI Receiving Advice Reject (578) | 0 | 0 | |
| Print Shipping Documents (550) | 2 | 2 | |
| Pack Confirmation (555) | 0 | 0 | |
| Invoice Journal (600) | 0 | 0 | |
| Print G/L Sales Recap-Detail (610) | 0 | 0 | |

**Current Link Metric Tab:** Displays the From Status, To Status, Base Value, Compare Value, and Difference (by percentage) fields.




| From Status | To Status | Base Value | Compare Value | Difference |
|---|---|---|---|---|
| Enter Order/Receive EDI Order (520) | Ship Confirmation (560) | 32 | 0 | ⬇ 100% |
| Enter Order/Receive EDI Order (520) | In Warehouse (535) | 1 | 0 | ⬇ 100% |
| Ship Confirmation (560) | EDI Receiving Advice Reject (578) | 4 | 0 | ⬇ 100% |
| In Warehouse (535) | Pick Confirmation (545) | 16 | 0 | ⬇ 100% |
| Enter Order/Receive EDI Order (520) | Print Pick (540) | 5371 | 2171 | ⬇ 60% |
| Ship Confirmation (560) | Sales Update (620) | 16 | 12 | ⬇ 25% |
| Print Invoices (580) | Sales Update (620) | 5181 | 4865 | ⬇ 6% |
| Ship Confirmation (560) | Print Invoices (580) | 8548 | 8187 | ⬇ 4% |
| Print Pick (540) | Ship Confirmation (560) | 6236 | 6193 | ⬇ 1% |
| EDI Receiving Advice Reject (578) | Print Invoices (580) | 8 | 8 | |

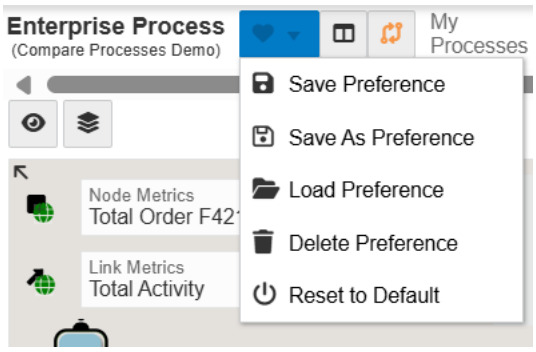
The settings for Show Zero Links and Show Zero Nodes on the Show Display Options window are considered in the table summary for the records. For example, if Show Zero Links is enabled, all the records, regardless of base or compare value, are displayed in the table summary. If Show Zero Links is disabled, all the records are displayed except those where both the base and compare values are zeros. See *Using the Show Display Option*.

9. Click the **Diagram Format** icon to return to the enterprise process diagram.

> **Note:** Similarly, you can add and compare enterprise processes with connected processes using split view. For example, when you add the two instances of the same enterprise processes with connected processes to the split panes, the system presents the hierarchy window displaying the hierarchy between the parent and child process on the left pane. You can click a parent or child process on the hierarchy window to open them on both the split panes.

10. Click the **Preferences** drop-down list, and click **Save As Preference** to save your preferences for the split view with a new name or click **Save Preference** to save your preferences with the previously saved name. The name of the preference is displayed in parentheses below the Enterprise Process text on the window.

    You can click **Load Preference** to open a previously saved preference. You can also delete the preference by clicking **Delete Preference**, or open the first enterprise process by clicking **Reset to Default**.

> **Note:**
>
> 
> 

Similarly, you can compare two snapshots of the same enterprise process, or a snapshot of an enterprise process with the same process by enabling the **Snapshot** option and selecting the required snapshot from the **Select Snapshot** drop-down list from the split panes.

11. Click **Close** to close the Enterprise Process window.