



Workflow for EnterpriseOne

Mohsin Saeed

msaeed@jgeigerconsulting.com

Jeff Geiger

jgeiger@jgeigerconsulting.com

Agenda

- What is workflow?
- Benefits of implementing workflow
- What does it do?
- Sample Process Without Workflow
- Sample Process With Workflow
- Existing Workflow
- Where to Look for Workflow
- Components of Workflow
- Creating a Custom Workflow Process

What is Workflow?

Workflow Management System

“A system that defines, creates and manages the execution of business processes through the use of software...”

“.... 90 percent of all time that used to perform tasks within the business setting is classified as transfer time, whereas 10 percent is used for the actual performance of those tasks...”

Workflow Management Coalition (www.wfmc.org)

What is Workflow?

- In JD Edwards EnterpriseOne, workflow is a set of tools to automate formerly paper-based, manual processes by passing documents, information and tasks from user to user.
- It is based on a set of configurable procedural rules and can be customized

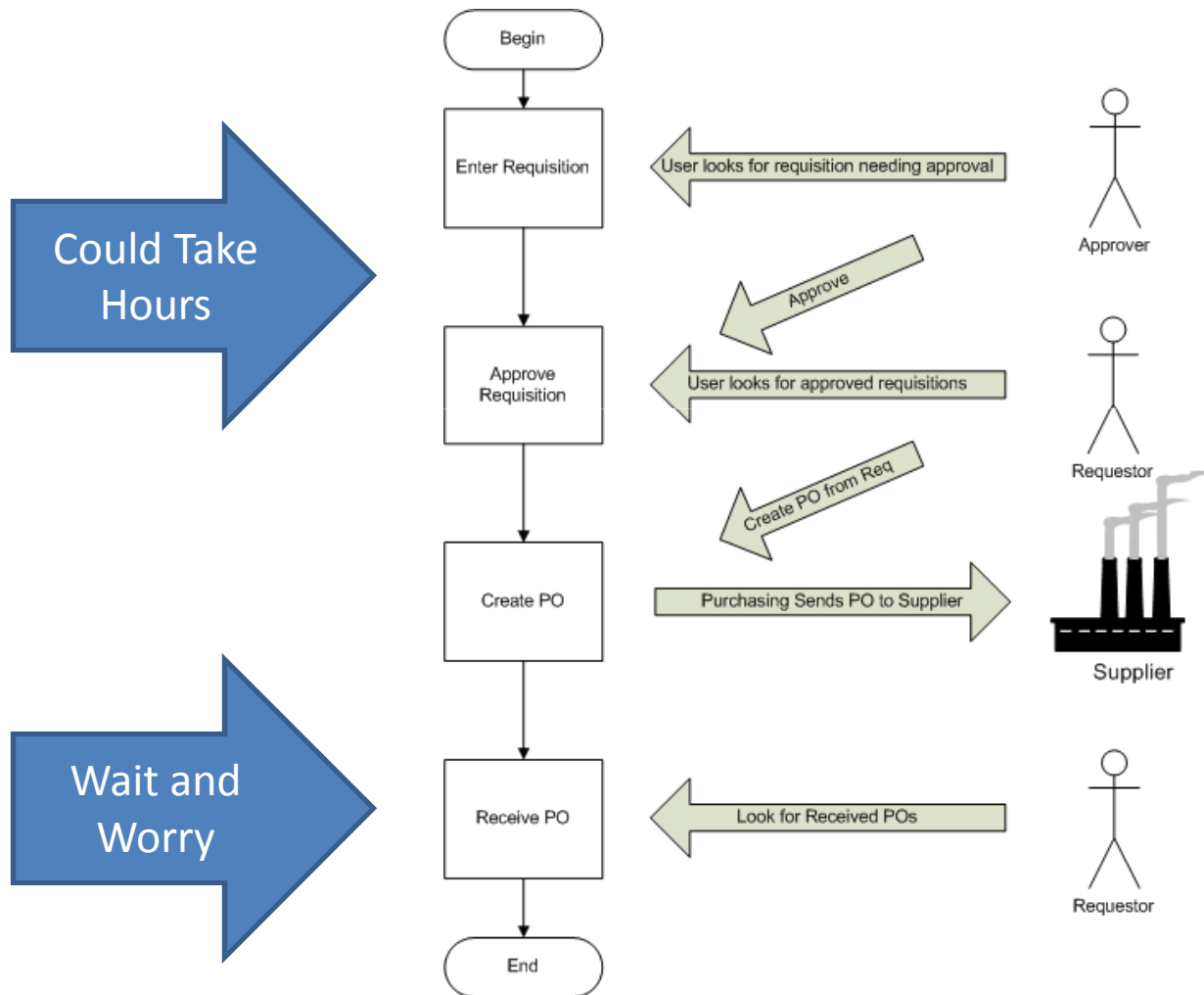
Benefits of Implementing Workflow

- Reduce elapsed time to execute a process end-to-end
- Reduce process costs
- Eliminate manual steps to increase process efficiency
- Improve process control
- Improve your user's experience
- Increase the user's confidence in the ERP system
- Provide flexibility to respond to changing business climate
- Ultimately increase customer satisfaction

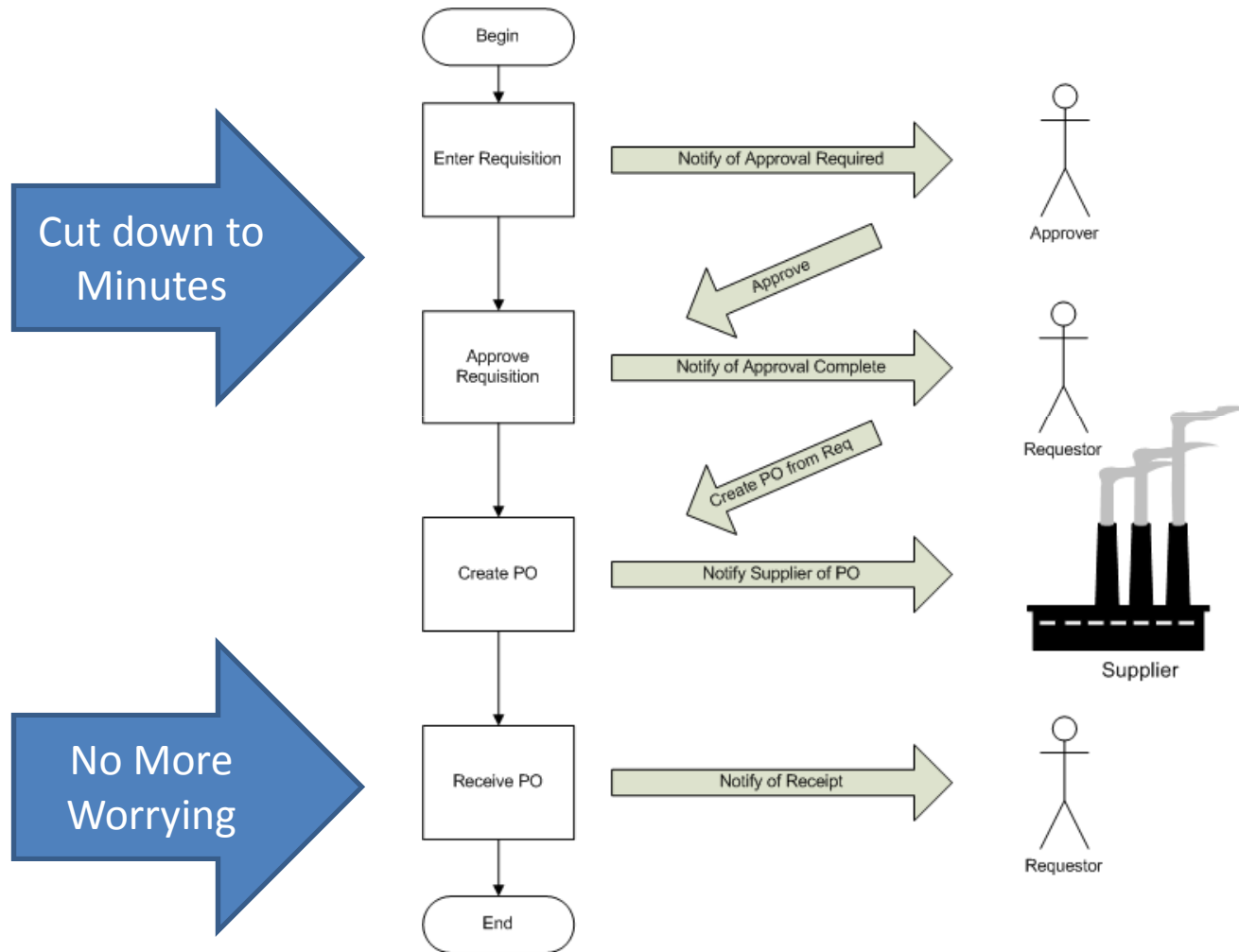
What does it do?

- Communicate
 - When an event takes place, workflow will send the correct user a message containing pertinent information and a short cut to the transaction that needs attention
- Automate
 - Initiate other applications, process, events, job streams, integration, add-on programs, executables, etc.
- Approve and Control
 - Follow approval routes and get user approval at key points (Think Sarbanes-Oxley)

Process Without Workflow



Process With Workflow



Existing Workflow

- Sales Order Entry
- Accounts Receivable
- Purchasing
- Equipment and Plant Maintenance
- HR/Payroll

** Any application can be implemented into work flow, batch or interactive.*

Where to Look

- **User Guides**
- **White Papers**
- **OMW – Workflow Objects search**
- **Processing options (workflow tab) on key applications**
- **Menu - G02**
- **My Oracle Support**

Workflow Components

- **Built-in Workflow Engine**
- **Pre-Built Workflow Processes**
- **Pre-Built Triggers**
- **Graphical Workflow Designer (Workflow Modeler)**
- **Notification Groups**
- **Email Integration**
- **Escalation Engine**
- **Workflow Monitor**
- **Workflow Auditor**

Workflow Components

What the Components Do:

- Enable
- Build
- Manage
- Monitor
- Measure

Creating a Custom Workflow Process:

Creating a Custom Workflow Process:

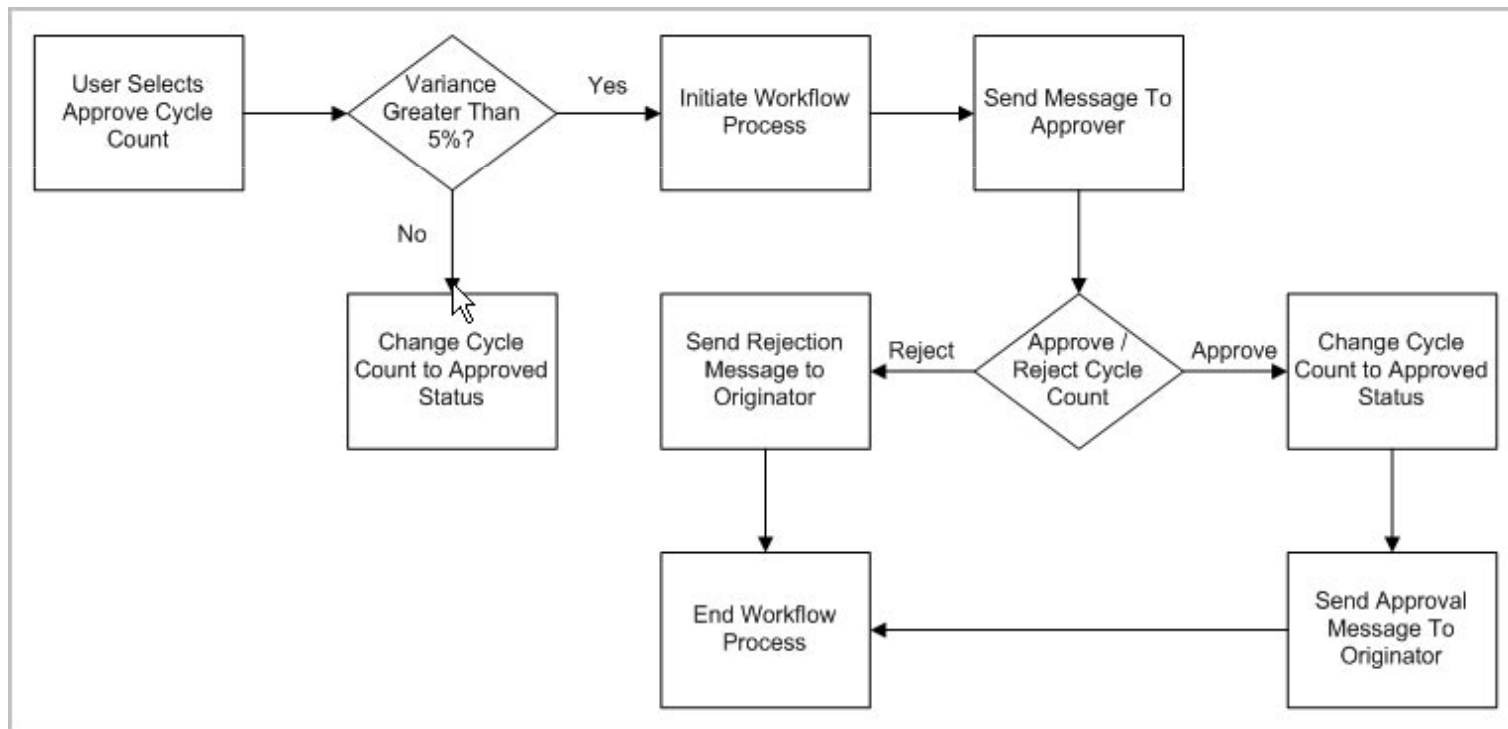
Key Points to Remember:

- Mainly use Object Management Workbench (OMW) to develop the pieces
- Need to understand data structures
- Works like mail merge
- May need to modify JDE Objects

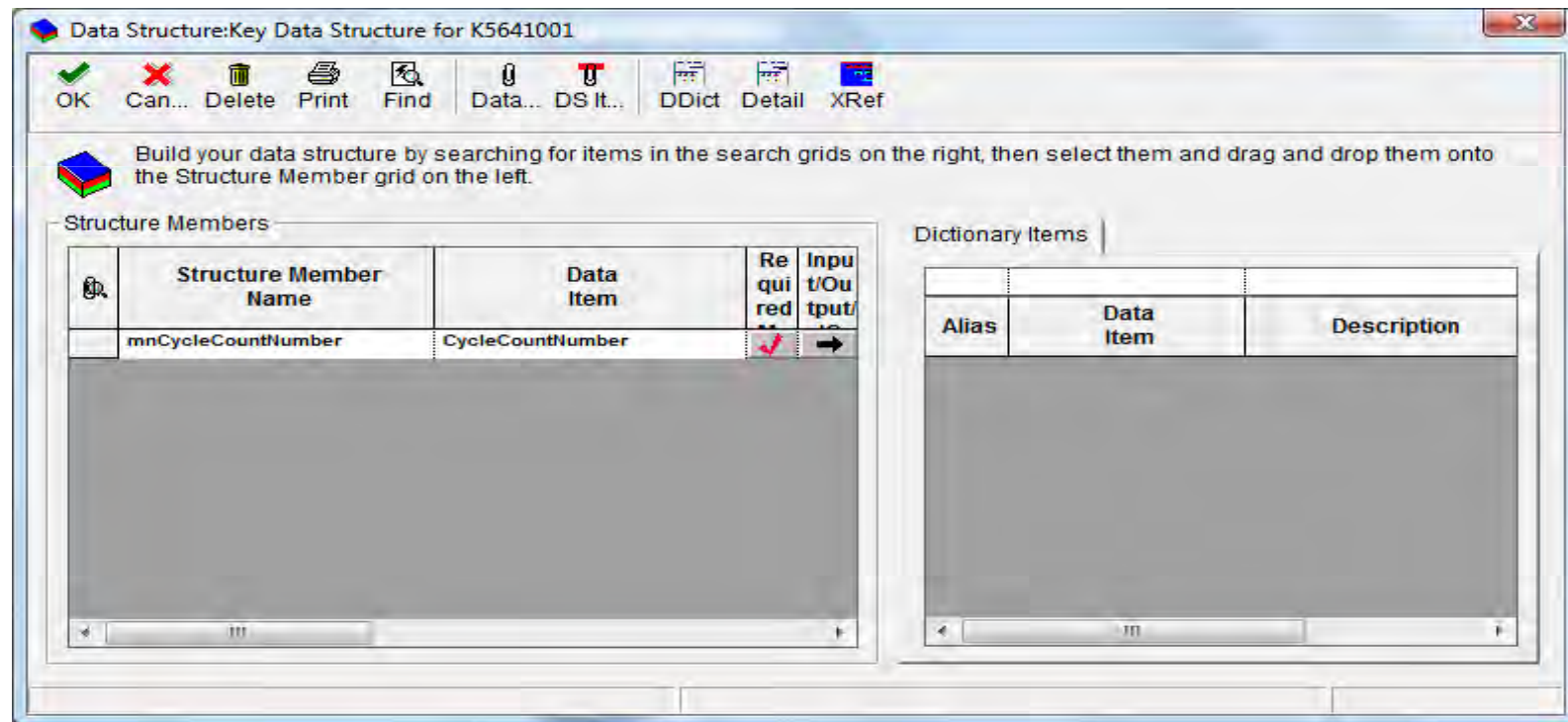
Creating a Custom Workflow Process:

- Step 1: Create the data structure for Key data
- Step 2: Create the data structure for Additional data
- Step 3: Create the Workflow process Object
- Step 4: Create message templates for approver and originator
- Step 5: Attach data structures to workflow process
- Step 6: Create activities within workflow process using OMW
- Step 7: Attach logic to the activities
- Step 8: Create Relationships Between the Activities
- Step 9: Activate the workflow process
- Step 10: Workflow enable application

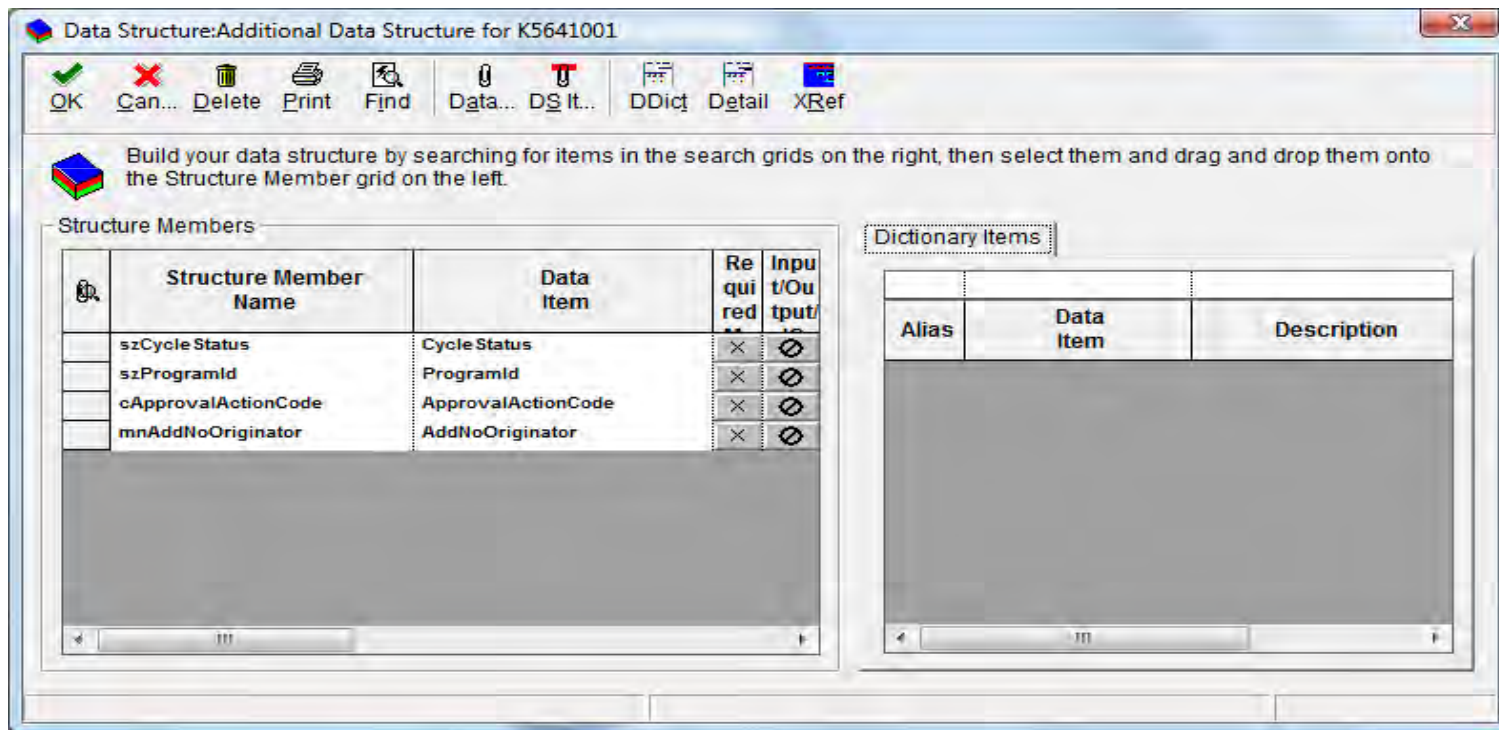
Example: Inventory Cycle count approval if the variance is over a certain amount



Step 1: Create the data structure for Key data



Step 2: Create the data structure for Additional data



Step 3: Create the Workflow process Object

ProcessMaster Data

Process: P57410002 History Tracking

Version: 1

Description: Cycle Count Approval

Product Code: 57 Reserved for Clients

Category Code 1:

Category Code 2:

Category Code 3:

Activity	Description	Activity Type	Description	Event Form Definition	Escalation Y/N	Escalation Rule

Step 4: Create message templates for approver and originator

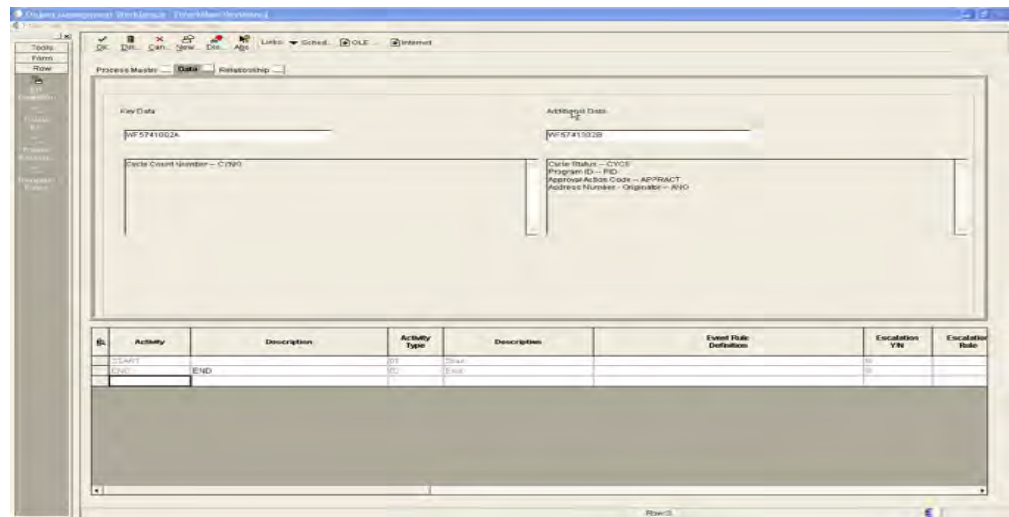
- Add the following messages using P92002 with the error level set to 3:
 - LM5641004 – Request Cycle count &1 approval
 - LM5641005 – Approval Cycle count &1
 - LM5641006 – Rejected Cycle count &1

The screenshot shows the P92002 [Glossary Items] application window. The main area is titled "Item Specifications" and contains the following fields:

Alias	LM5641004
Glossary Group	E
Product Code	56
Product Code Reporting	56
Description	Request cycle Count &1 approval
Error Level	3

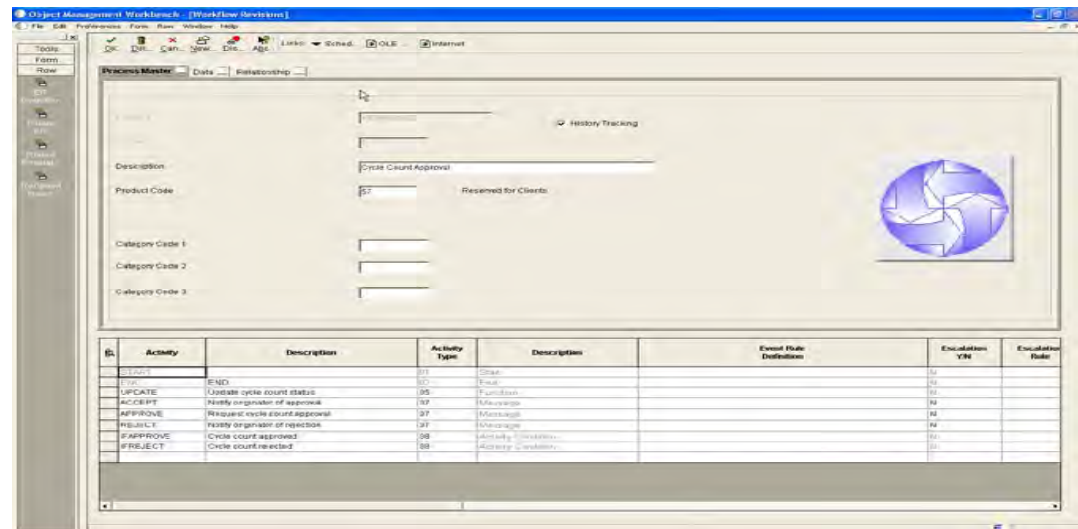
Step 5: Attach data structures to workflow process

- Open the workflow process design through OMW. Select the data tab, assign the two data structures to the workflow process, and click OK.



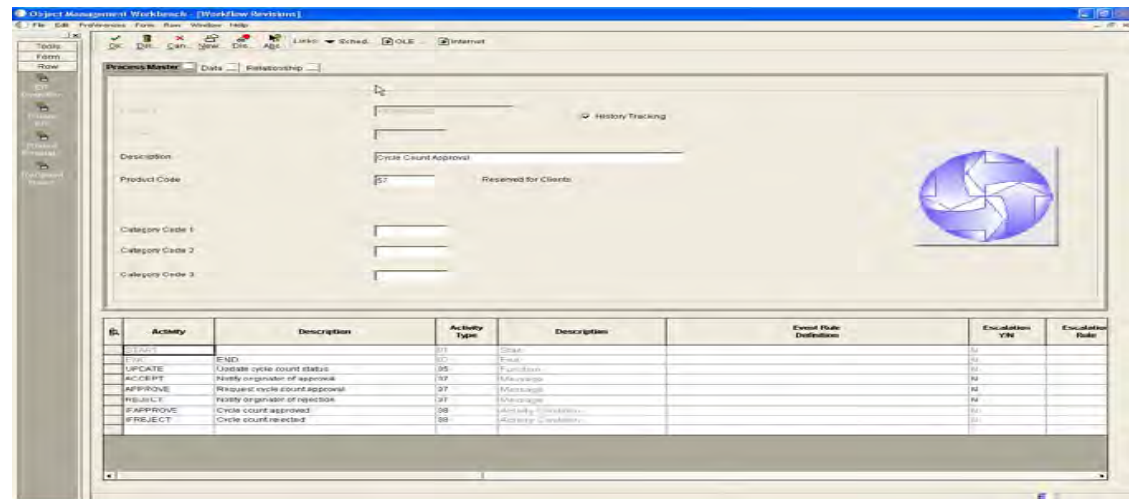
Step 6: Create activities within workflow process using OMW

- APPROVE – Message activity to send an approval message to the approver
- IFAPPROVE – Activity Condition to determine if approver accepted
- IFREJECT – Activity Condition to determine if approver rejected
- UPDATE – Function activity to update cycle count status if approved
- ACCEPT – Message activity to send message to originator of approval
- REJECT – Message activity to send message to originator of



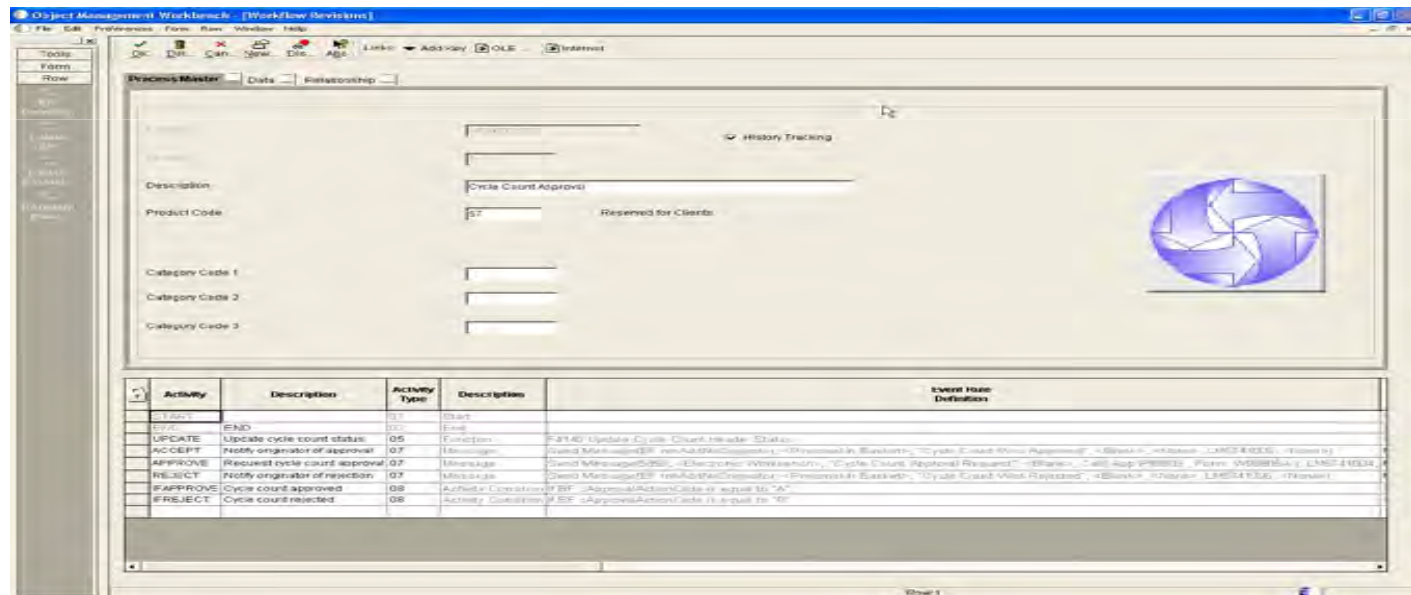
Step 7: Attach logic to the activities

- Highlight the APPROVE activity and choose “ER Definition” (Event Rule Definition) from the Row Exit.
- Choose the Send Message function and define parameters for that function.
- In the Active parameter choose application P98805 form W98805A.



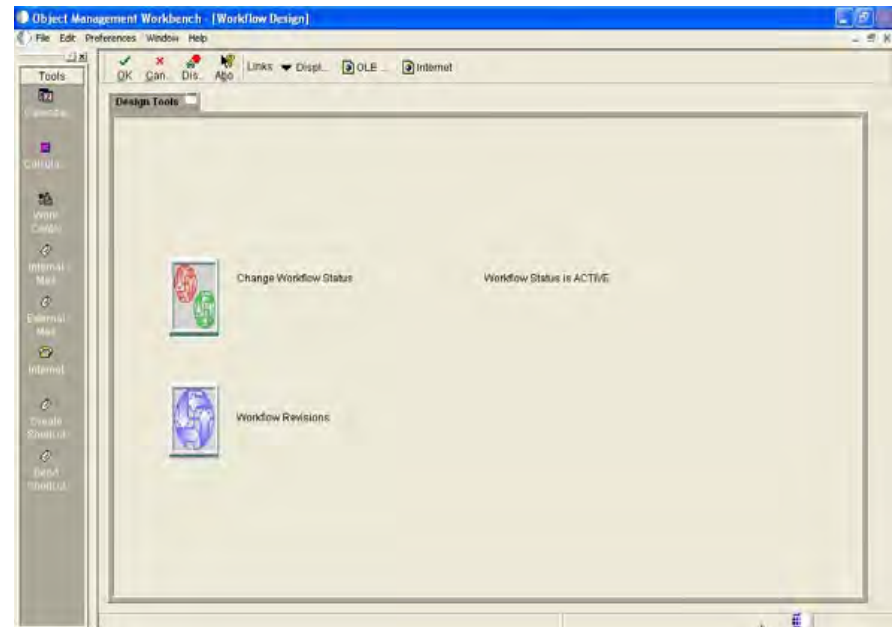
Step 8: Create relationships between activities

- Relationships indicate in which order and under what conditions activities occur.
- Choose Revise Relationships from the Form Exit.



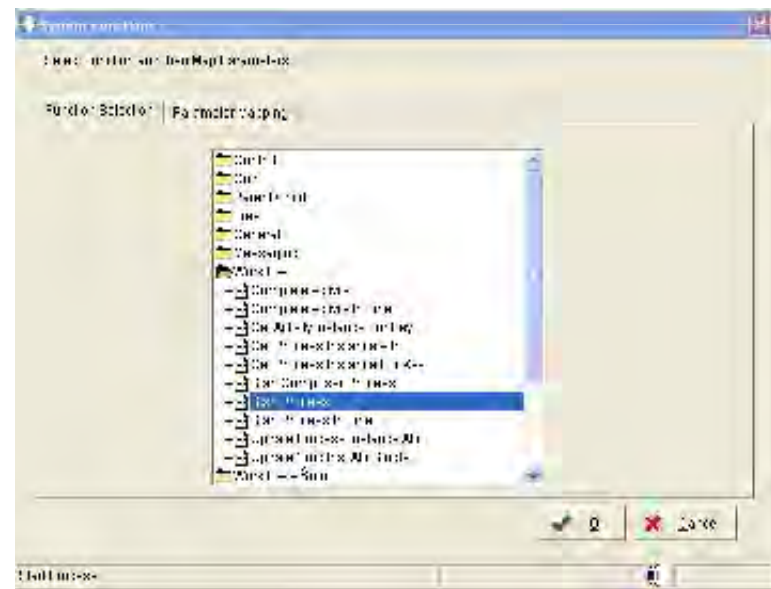
Step 9: Activate the workflow process

- From OMW select your workflow object and click on design
- Change the status to Active In the Active parameter choose application P98805 form W98805A



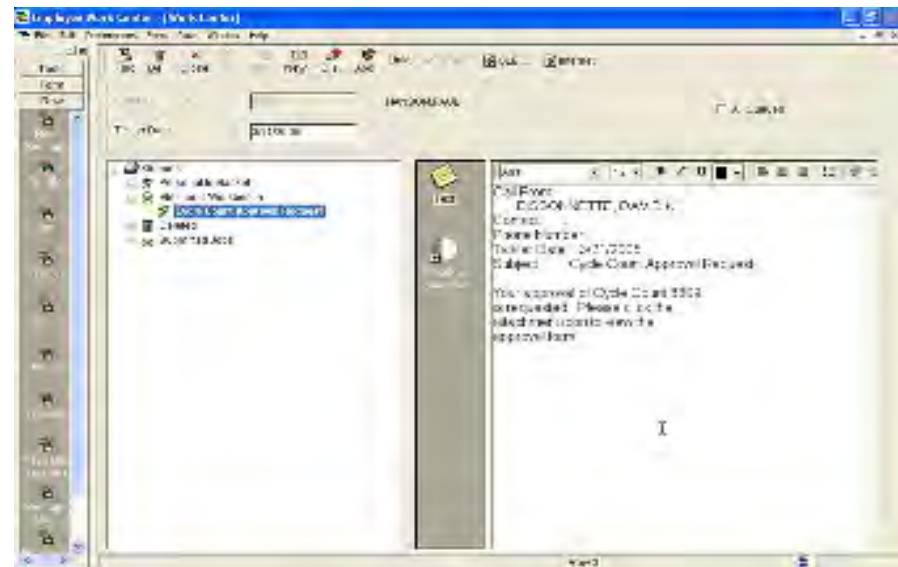
Step 10: Workflow enable cycle count review application

- Open P41240 in FDA (Form Design Aid) through OMW
- Open up Event Rules in the Approve Cycle Count Row Exit
- The work flow is launched by calling the Start Process System Function
- Map data structure parameters in the System Function call



Now You're ready to use the workflow process

- As soon as a user selects Approve Cycle Count in the Cycle Count Review application and the variance is greater than 5%, the cycle count is routed for approval
- The approver will receive a message in their work center that the cycle count needs to be approved



Useful workflow applications

- Process Activity Monitor (P98860)
 - Allows you to review all activities and their status in each occurrence of your workflow process.
 - Manage performance of your workflow and track how long work takes to get completed.
- Purge Completed Processes (R98860P)
 - Purge completed processes to free up database space
- Start Escalation Monitor (R98810)
 - Escalate activities to next level

Summary

- Standard Workflow is already available in E1 Xe and beyond
- Setting up a custom workflow process does take some planning and setup
- Both result in increased productivity, less mistakes, and more timely information

Questions?