Unlock ultimate efficiency

Event-based Orchestrations for seamless business automation

JD Edwards INFOCUS

Jordan Myers, Sr. Solution Architect

- Jordan Myers is a seasoned Sr. Solution Architect at Grant Thornton Advisors LLC, specializing in implementing cutting-edge Digital Transformation solutions with JD Edwards Orchestrator and Tools. With a deep expertise in optimizing business processes and enhancing operational efficiency, Jordan leverages innovative technologies to drive impactful change and deliver exceptional results for clients across various industries. His commitment to excellence and forward-thinking approach make him a trusted advisor in the realm of digital innovation.

Agenda

Grant Thornton Overview

Enterprise Automation Overview

Client Use Cases

- Parent Item Master Creation
- Auto Tax ID Generation
- Emailing Work Order Print
- Work Order Entry Defaults
- DEMO: Generating Work Orders from External Systems

About Grant Thornton

Grant Thornton is one of the world's leading organizations of independent assurance, tax and advisory firms. These firms help dynamic organizations unlock their potential for growth by providing meaningful, actionable advice through a broad range of services. Proactive teams, led by approachable partners in these firms, use insights, experience and instinct to solve complex issues for privately owned, publicly listed and public sector clients.

GLOBAL*	UNITED STATES*
72,858 people	9,772 people
135+ countries	46 offices
$7.45 bn revenue	$2.34 bn revenue

*Global refers to Grant Thornton International Ltd (GTIL) member firms (statistics as of Sept. 30, 2023). United States refers to professionals in Grant Thornton LLP, Grant Thornton Advisors LLC and GT US Shared Service Center India Private Limited and Grant Thornton Knowledge and Capability Center India Private Limited, both affiliates of Grant Thornton LLP that provide services to Grant Thornton LLP and Grant Thornton Advisors LLC (statistics as of Dec. 31, 2023) . All revenues listed are USD.

GRANT THORNTON U.S. KEY STATISTICS

Fortune 100 companies served

Fortune 500 companies served

Fortune 1000 companies served

UNIVERSAL CAPITAL MARKETS ACCEPTANCE

Top 5 firm

(2011 - Present)

- for number of commercial IPOs completed
- commercial IPOs for companies with $500 million or more in market cap

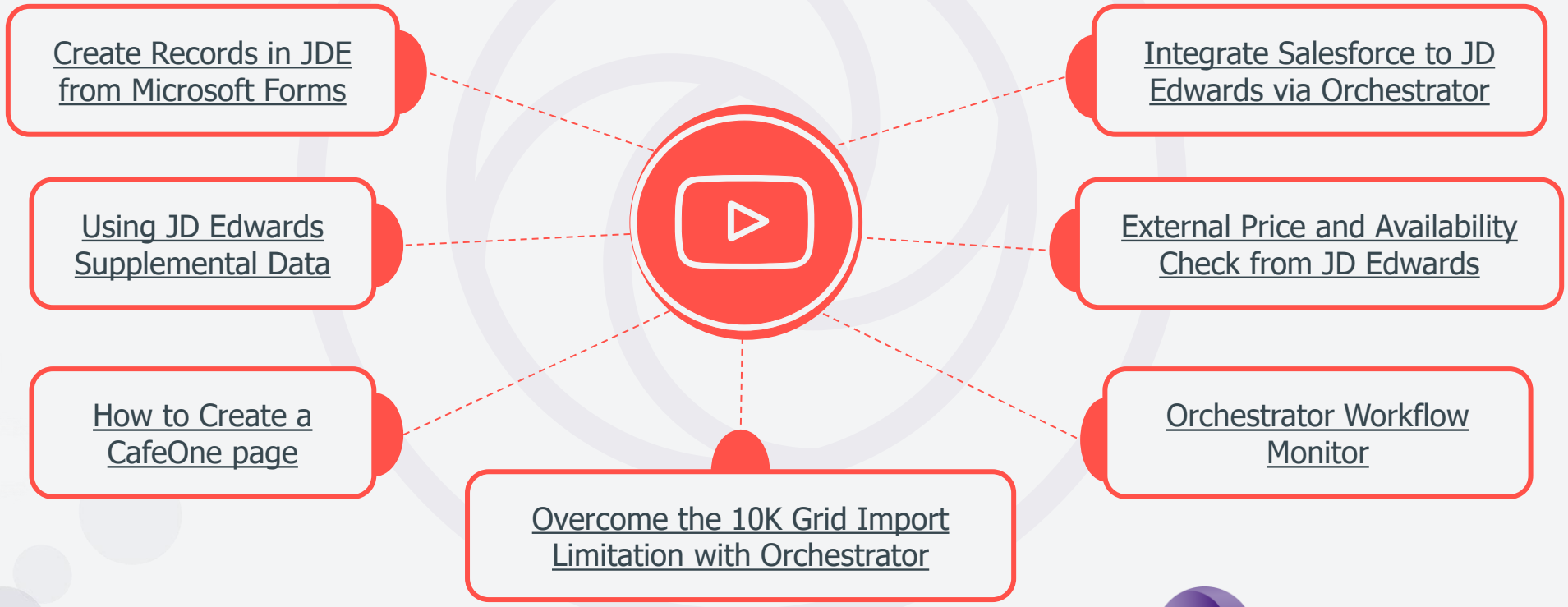
100%

of the top underwriters have completed IPOs with us

Grant Thornton
JD Edwards Highlights

GT US YouTube

Solution Videos



Enterprise Automation Overview

- Enterprise Automation is based on the following lifecycle:
  - Ingest
  - Model
  - Analyze
  - Solve
  - Measure

Enterprise Automation Overview

- The objectives of Enterprise Automation are to:
  - Expand the focus from individual transactions to the business as a whole
  - Make better use of existing data to reveal blind spots in a process
  - Define processes and data needed for better visibility and corrective actions

Client use cases

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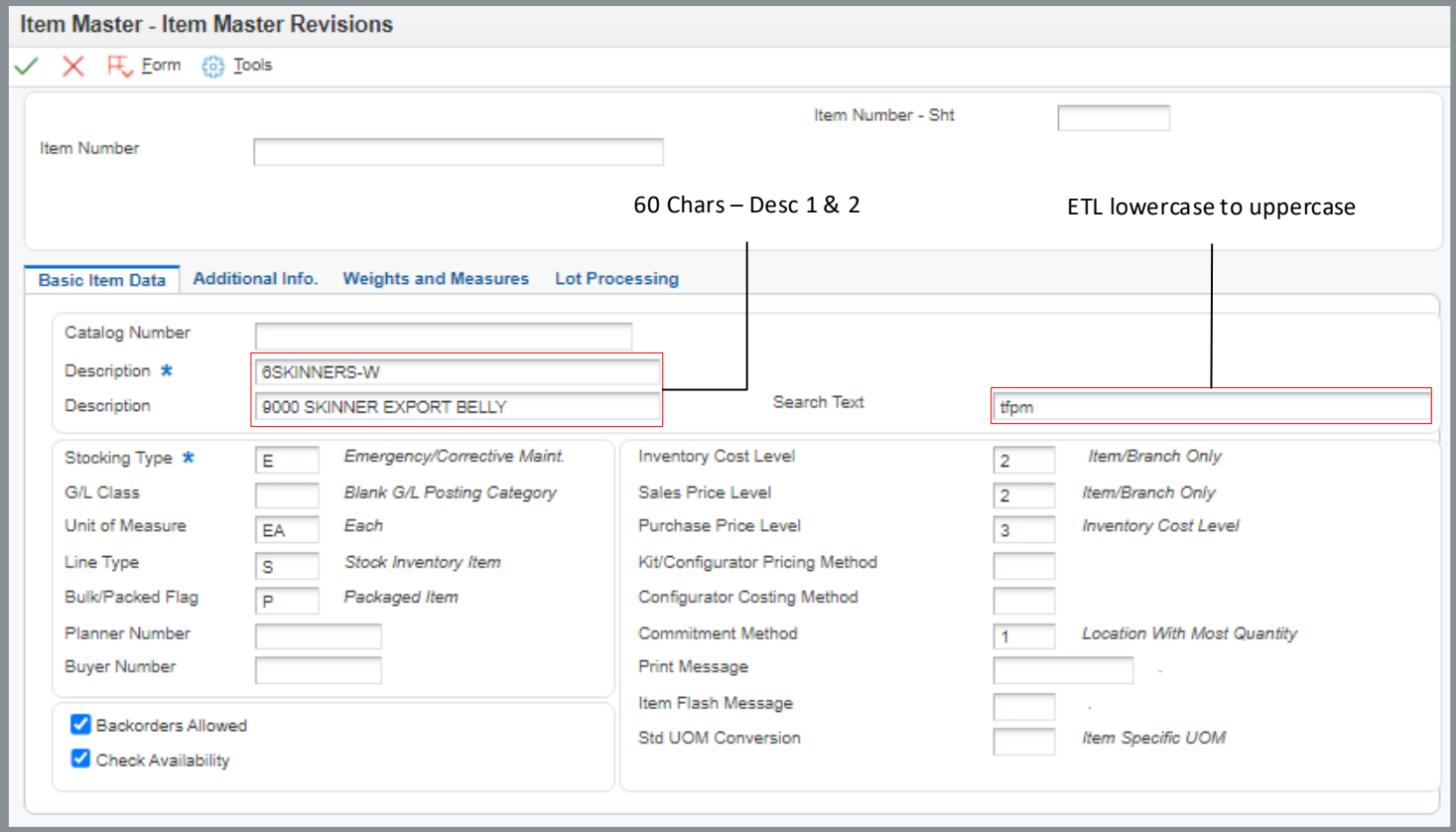
Client use cases – Parent Item Master Creation

- Business Requirement:
  - Obtain a system process to produce consistent data nomenclatures (e.g., naming conventions) for Item Masters that support Master Data for Maintenance Planning processes, such as Labor Routers and Bill Of Materials.
  - The Item Master creation process will have a Business Division prefix and next numbering model for Master Data output. Descriptions 1 and 2 will drive 30 characters per field, allowing up to 60 characters total.
    - Example Item Master – Item Number: TFPM100167
    - Example Item Master – Description 1: *6SKINNERS-W*
    - Example Item Master – Description 2: *9000 SKINNER EXPORT BELLY*



Client use cases – Parent Item Master Creation

- Master Data Output:
  - Obtain a system process to produce consistent data nomenclatures (e.g., naming conventions) for Item Masters that support Master Data for Maintenance Planning processes, such as Labor Routers and Bill Of Materials.
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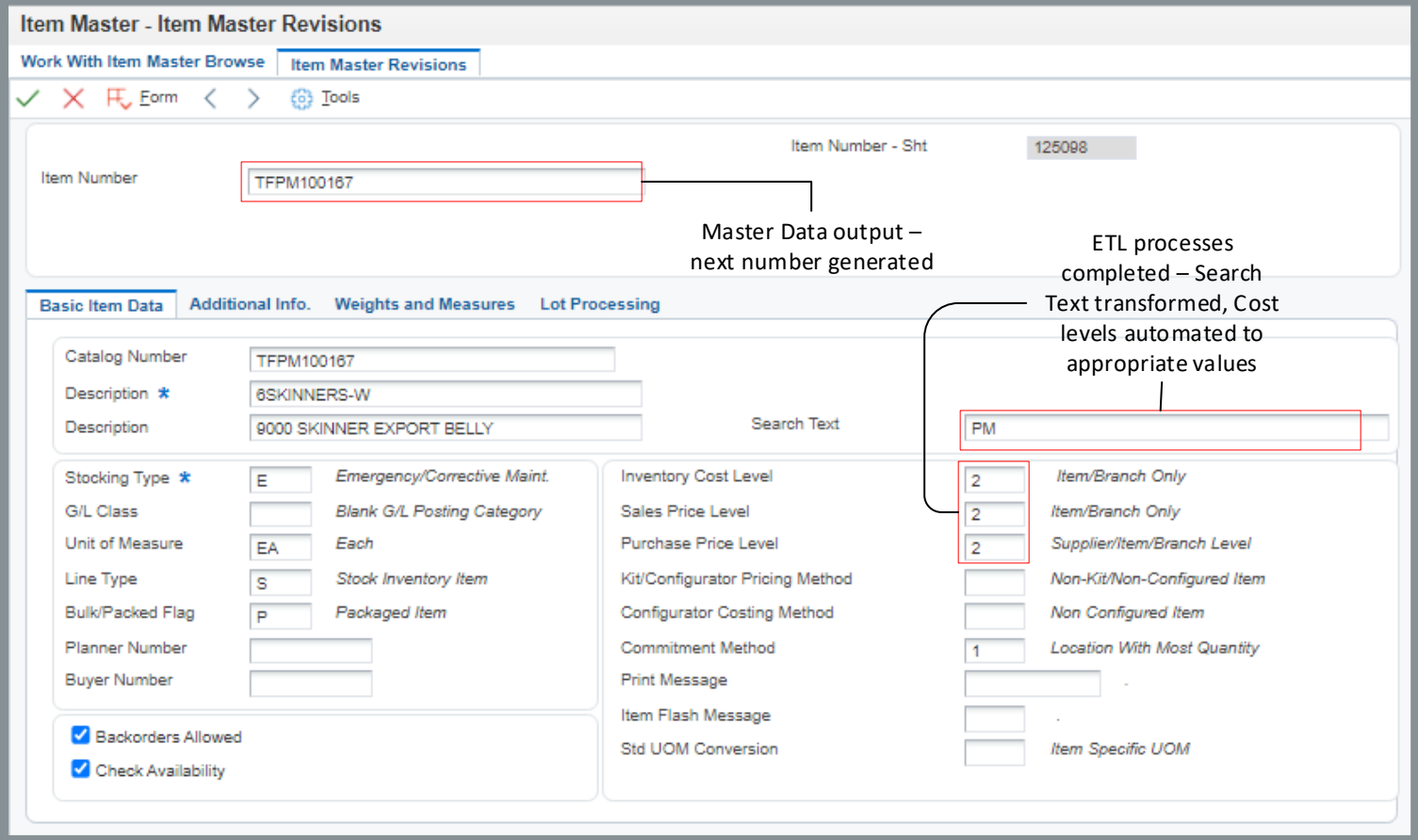
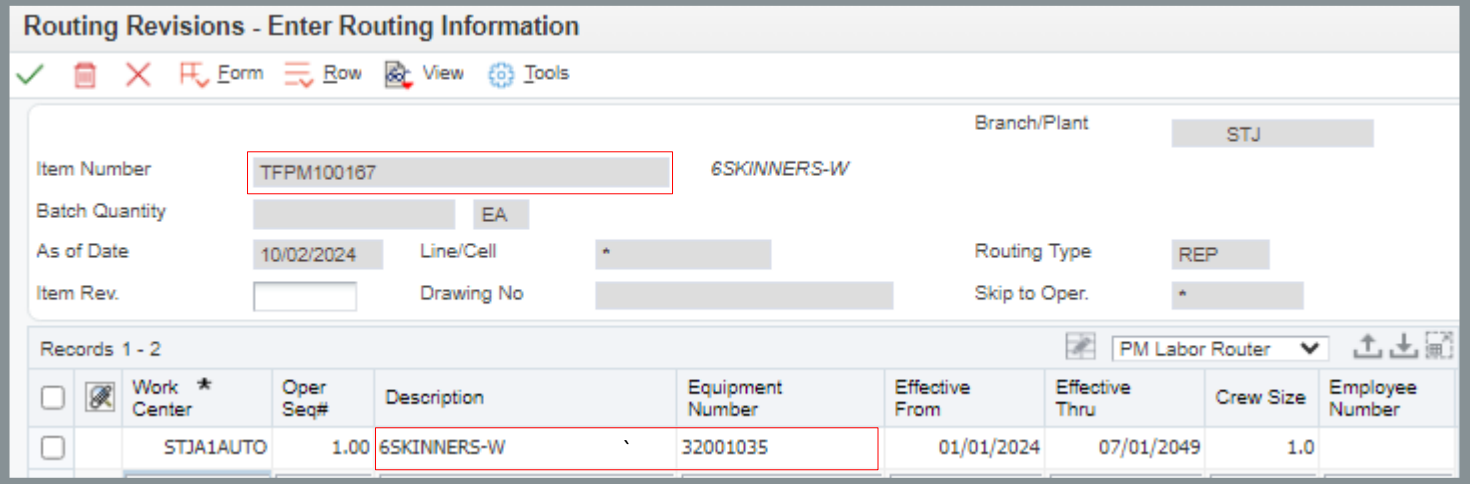


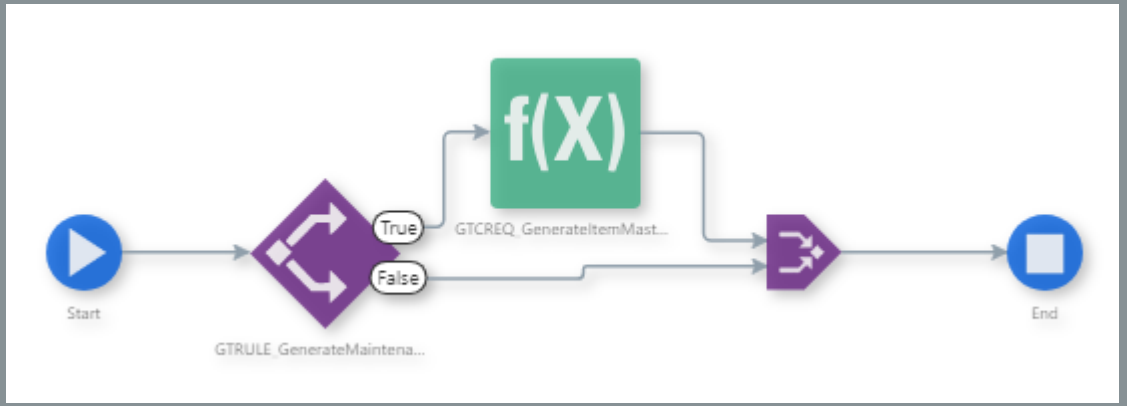
Client use cases – Parent Item Master Creation

- Downstream Impact:
  - A PM Router is created to support Preventative Maintenance Work Orders
  - Equipment is assigned to the PM Router
  - Master Data processes are streamlined



Client use cases – Parent Item Master Creation

- Orchestration Components:
  - A Rule object is called to identify if the Item Number field is null
  - A Custom Service Request object identifies the business division that created the Master Data and assigns a Branch/Plant prefix and next number to the Item Number
  - Additionally, Cost Level information is synced to the appropriate client requirements to drive the Master Data in downstream applications such as Labor Router and Bill Of Materials revisions
  - A Form Extension is used to associate the Orchestration to trigger/execute using the OK button in the Item Master



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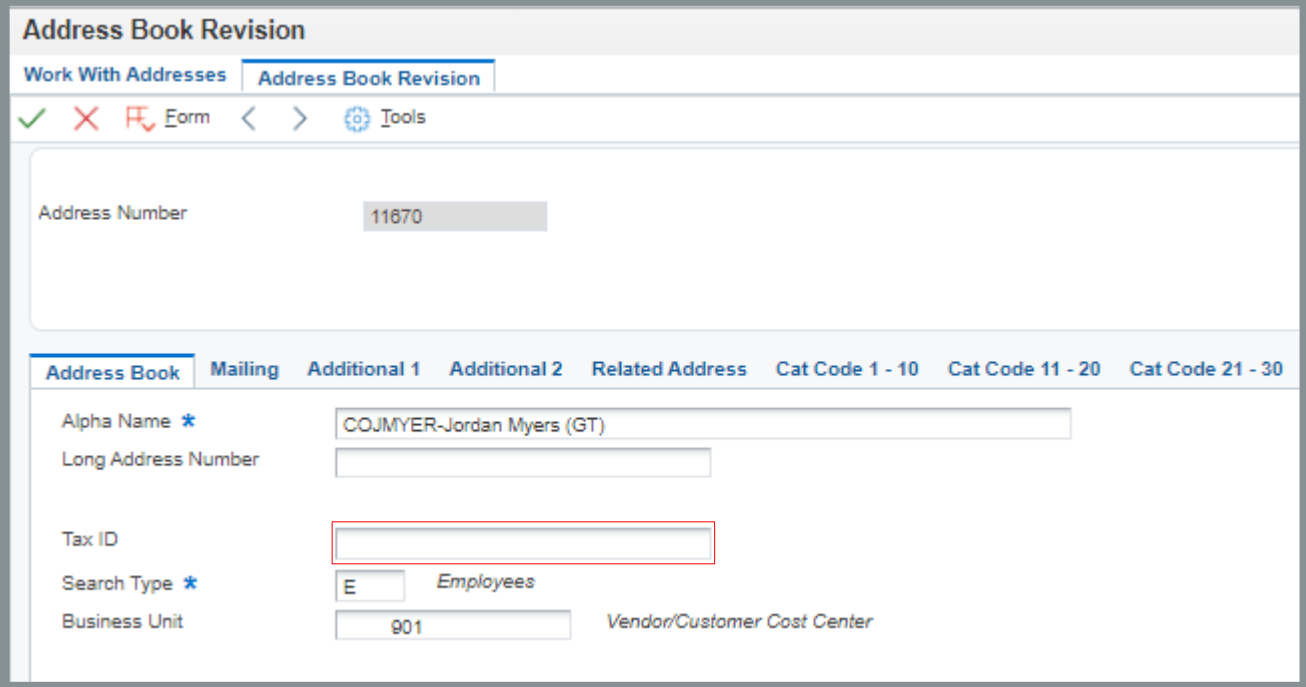
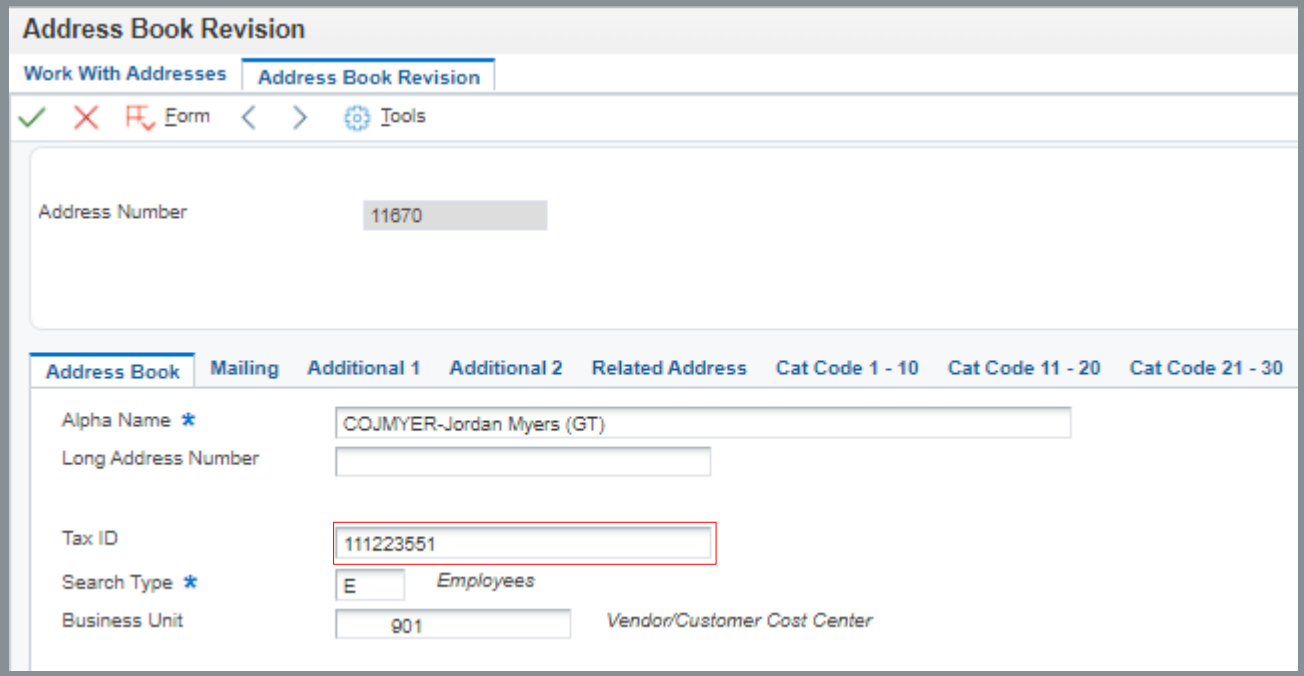
Client use cases – Auto Tax ID Generation

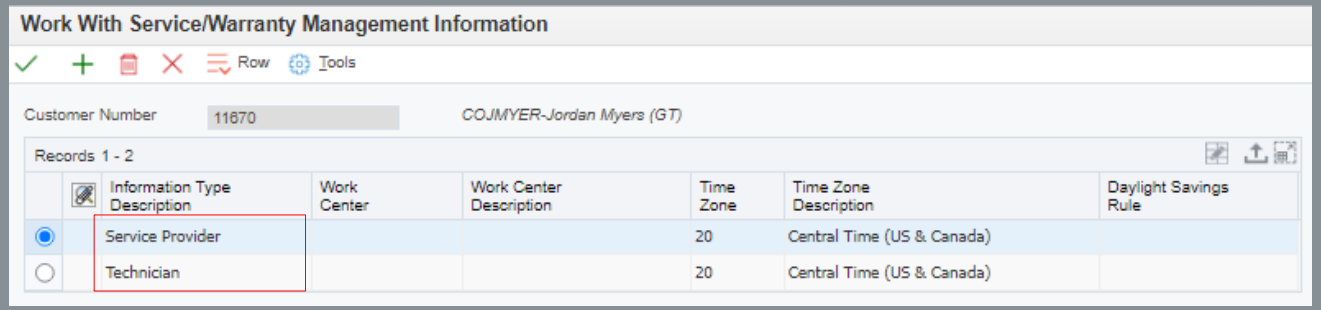
- Business Requirement:
  - Obtain a nine-digit number for Maintenance Resources in the Address Book Tax ID field to support Employee Master setup and Time Entry processes. Auto generate SWM Service Provider and Technician records to support Work Order Entry processes.
  - The following fields will trigger the Orchestration to output the Tax ID Master Data:
    - Search Type = "E" (e.g., Employee)
    - Business Unit = A Business Division in scope for Maintenance (e.g., 901).
    - Category Code 29 = "M" (e.g., Maintenance Resource)



Client use cases – Auto Tax ID Generation

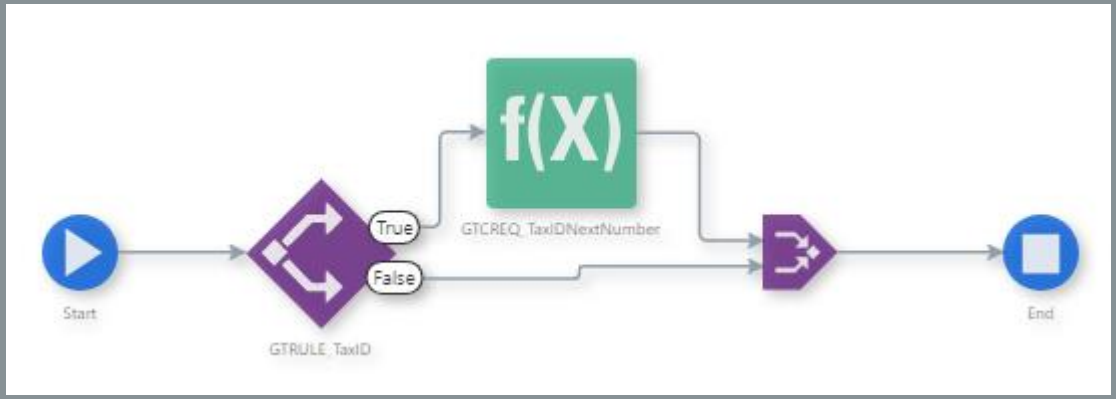
- Downstream Impact:
  - SWM information is auto generated for Service Provider and Technician records.
  - The Address Book record for the Maintenance Technician is now appropriately configured to support Employee Master setup, Work Order and Time Entry processes.

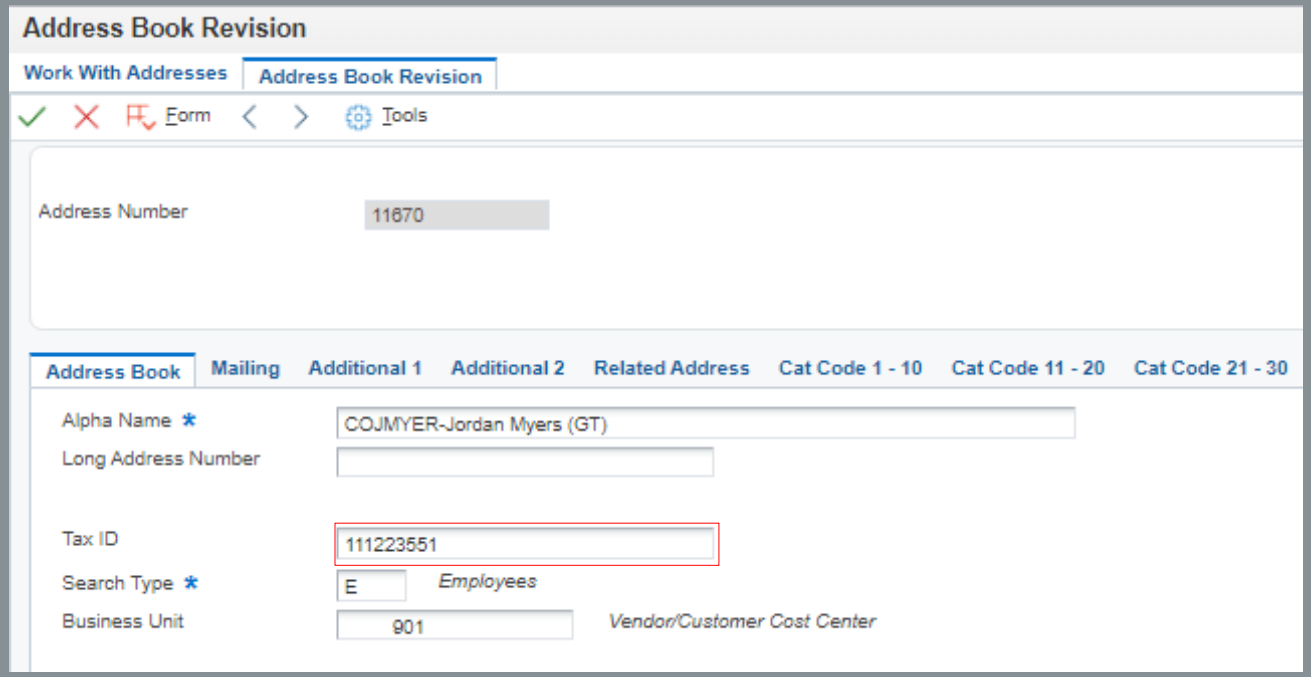




Client use cases – Auto Tax ID Generation

- Orchestration Components:
  - A Rule object is created to identify if the Tax ID field is null
  - A Custom Service Request is created to evaluate values in the Search Type, Business Unit, CC 29 fields and to call a Child Orchestration to create the SWM attributes in the Address Book





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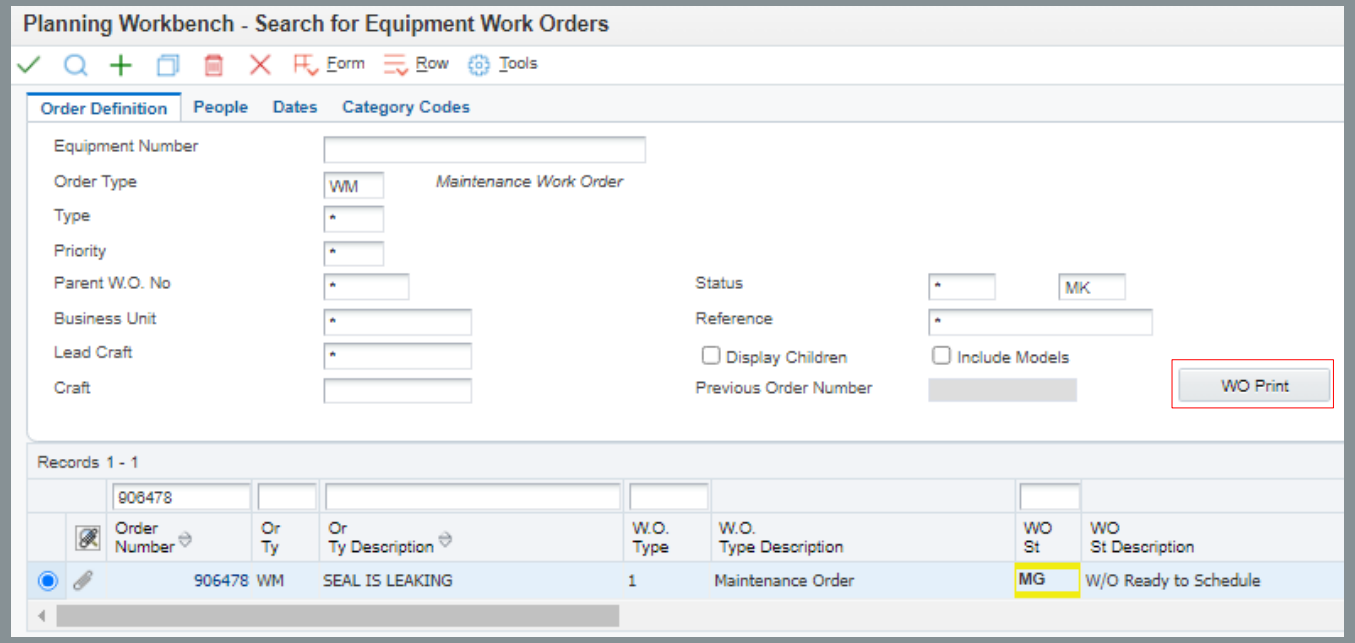
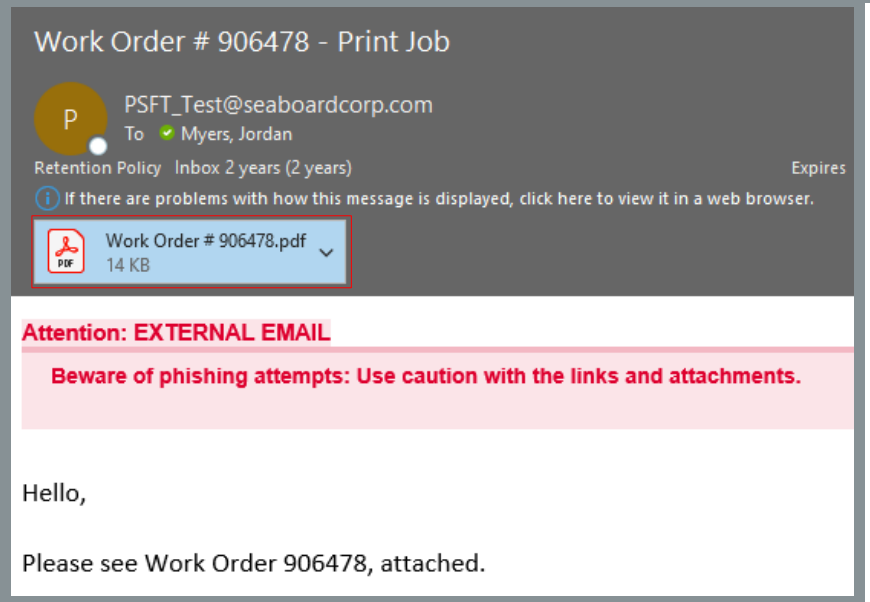
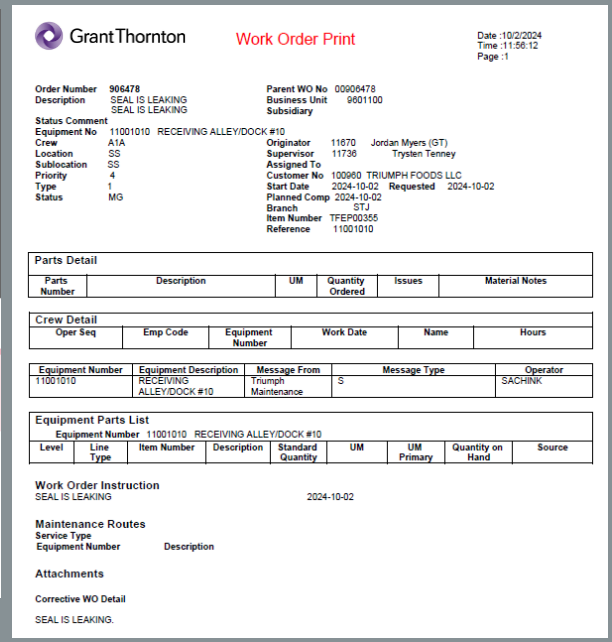
Client use cases – Email Work Order Print

- Business Requirement:
  - Print a Maintenance Work Order
  - Email the PDF output to a JD Edwards user

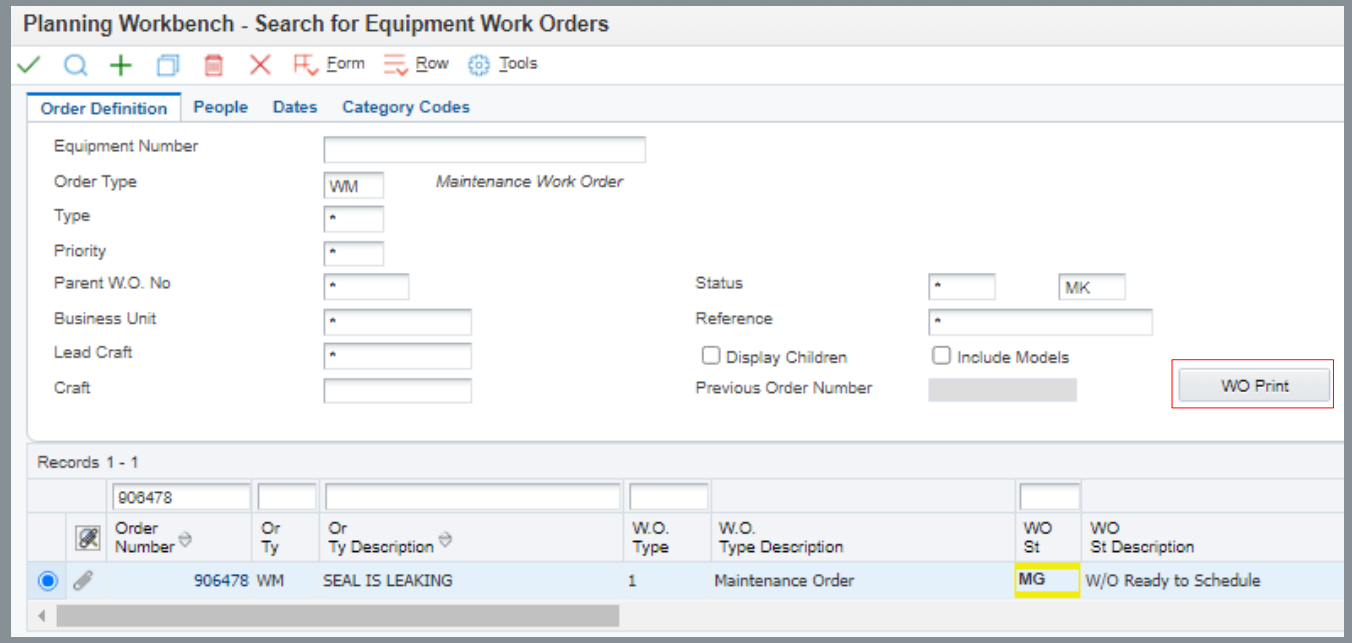


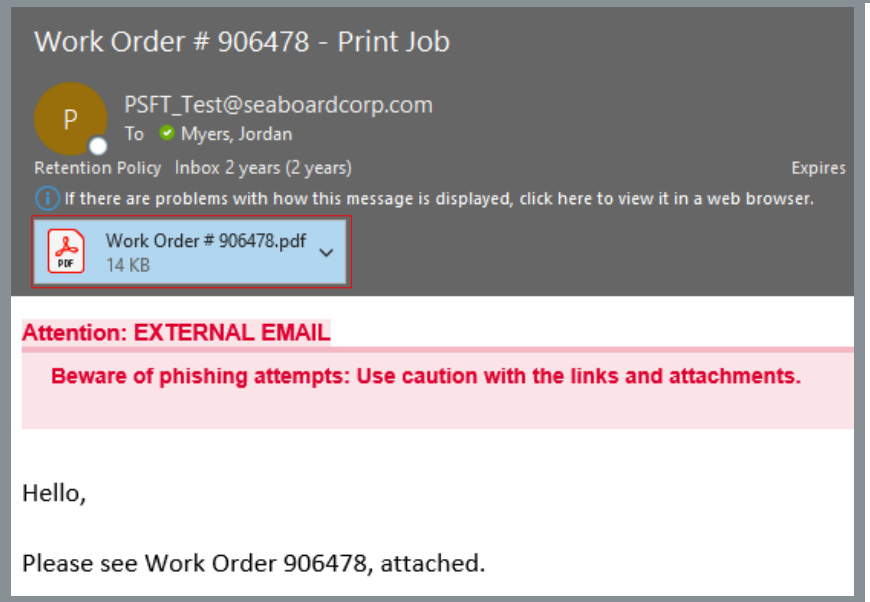


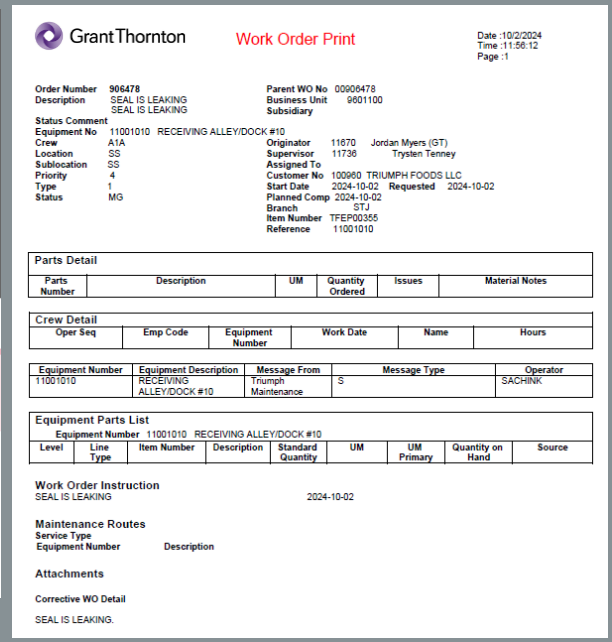


Client use cases – Email Work Order Print

- Downstream Impact:
  - Maintenance users from unique Business Divisions select a single button that is shared across divisions; Work Order output is sent to user via email

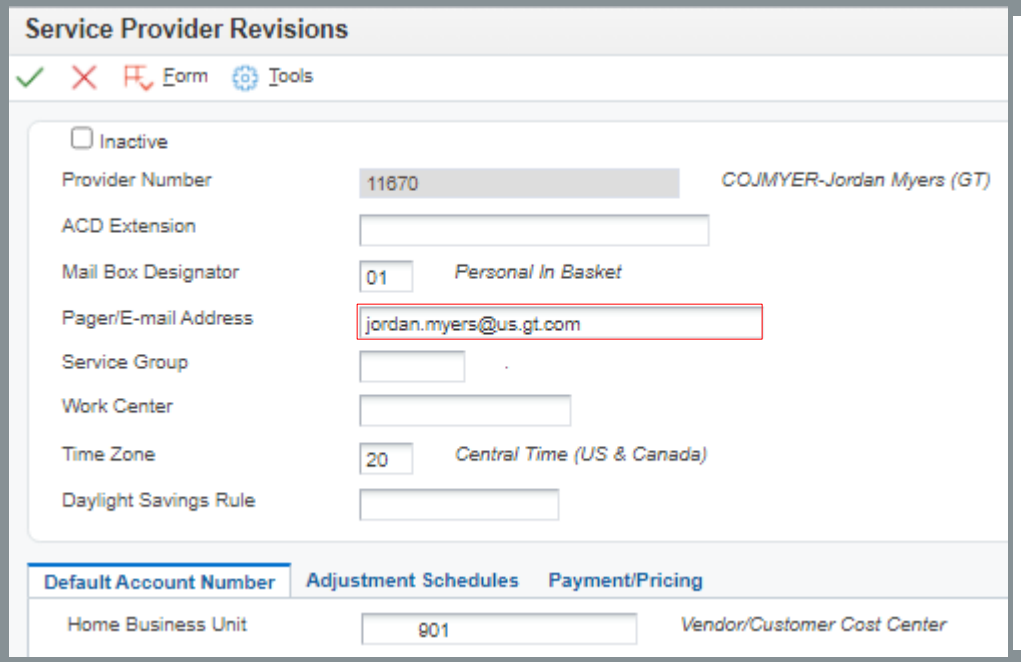


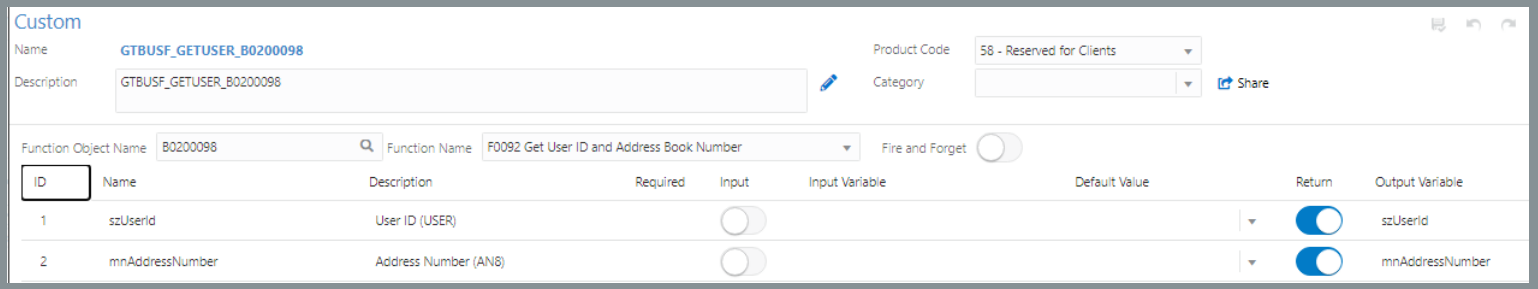


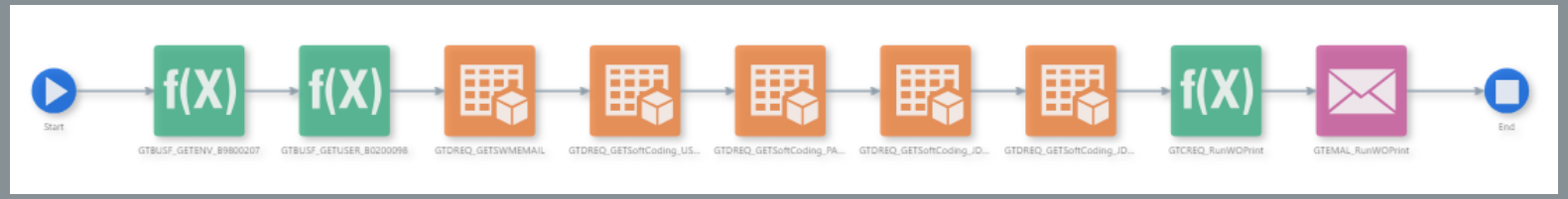


Client use cases – Email Work Order Print

- Orchestration Components:
  - A Form Extension button is shared across divisions
  - A business function (e.g., B0200098) is called from a Custom Service Request object that identifies the User ID and Address Book Number for who selected the Work Order Print button
  - The email address stored in the Address Book SWM Service Provider email/pager field is returned via Data Service Request
  - A Custom Service Object runs the Work Order Print (e.g., R48425) print job over REST API, using the version of Work Order print specific to the user's business division
  - A Message Service Request obtains the server and job number from the Report Service Request output, and emails the user the PDF output







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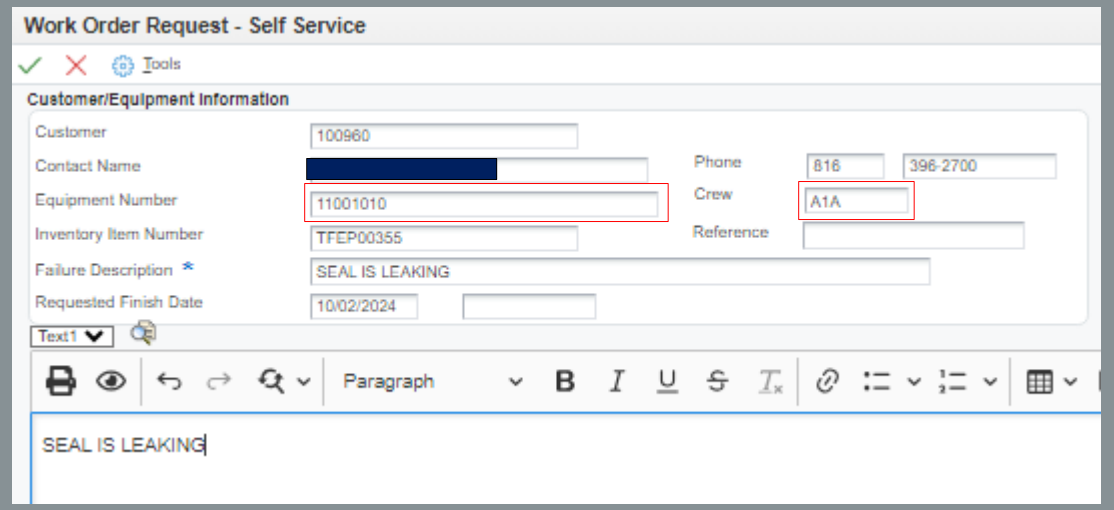
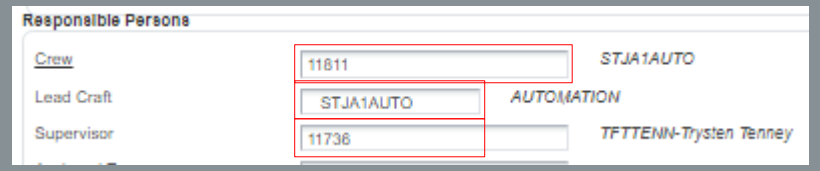
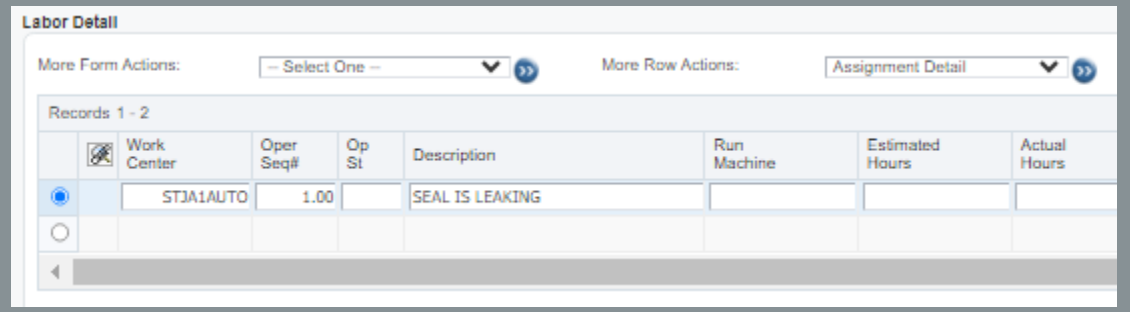
Client use cases – Work Order Entry Defaults

- Business Requirement:
  - Route the Cost Center (e.g., Business Unit) from the Equipment Master to the Work Order
  - Populate Crew, Lead Craft, and Supervisor fields in the Planning Workbench to streamline Resource Assignment processes

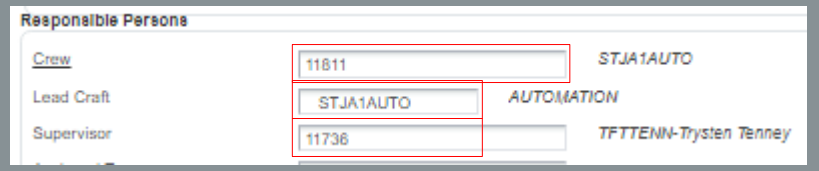


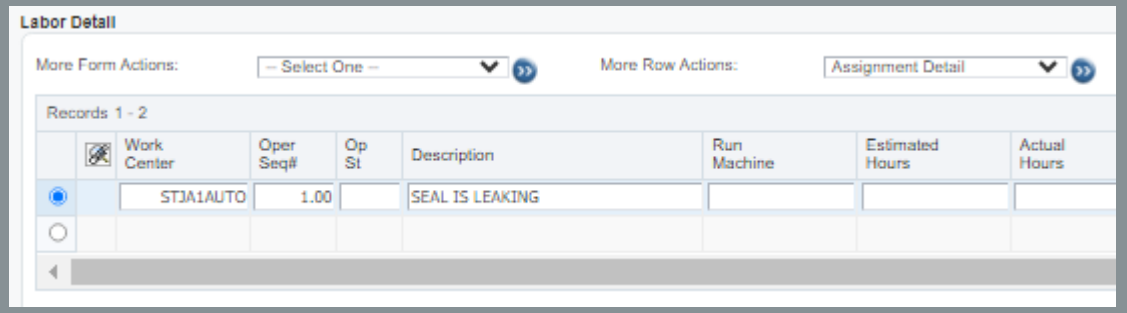


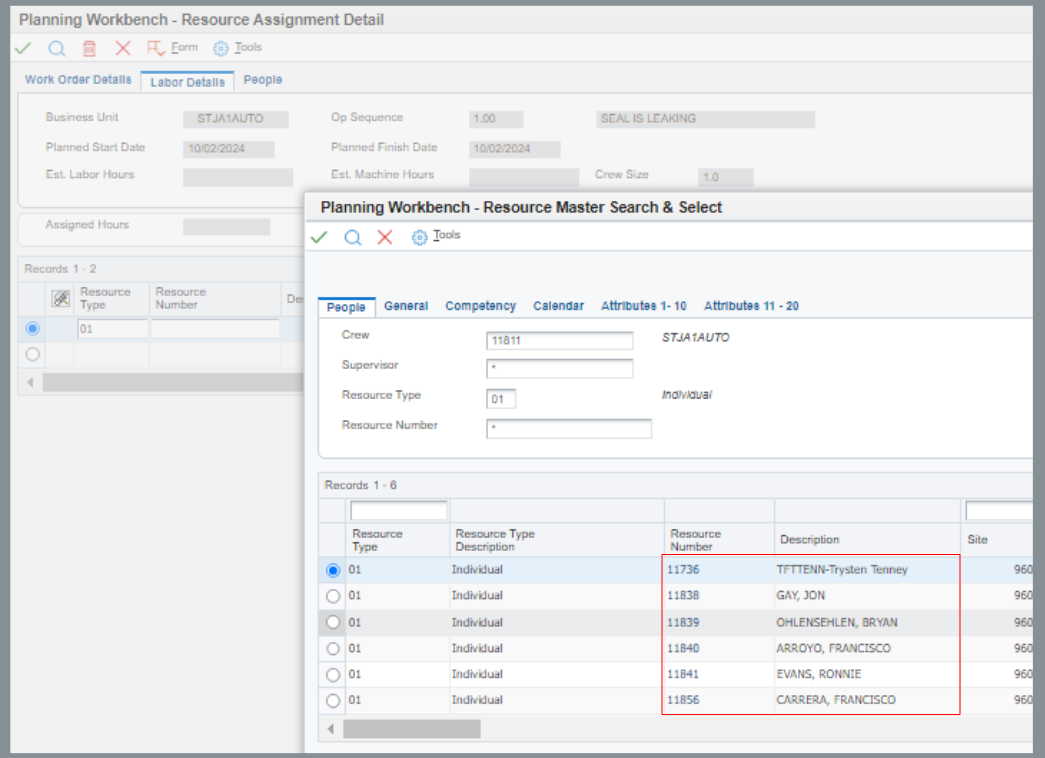


Client use cases – Work Order Entry Defaults

- Downstream Impact:
  - A Maintenance Planner and/or Supervisor can filter to their Work Orders in the Planning Workbench using the Crew, Lead Craft and Supervisor fields, and then assign a Maintenance Technician to the Work Order using a data driven process

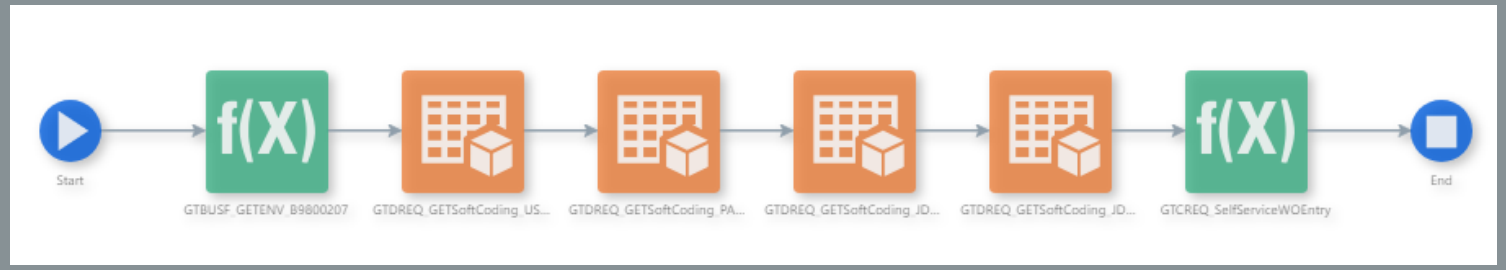






Client use cases – Work Order Entry Defaults

- Orchestration Components:
  - A Business Function is called to identify the environment that the user is in (e.g., Unit Test, Production)
  - Soft Coding records are returned via Data Service Request objects to support downstream Data Service Requests over REST API and Child Orchestrations that automate the actions (e.g., Crew, Lead Craft, Supervisor, Business Unit) in the Planning Workbench
  - A Custom Service object runs a Report Service Request to print the Work Order and calls Child Orchestrations based on which Business Division submitted the Work Order, ensuring appropriate versions are called to support WO Types and WO Activity Rules according to each Business Division's unique requirements



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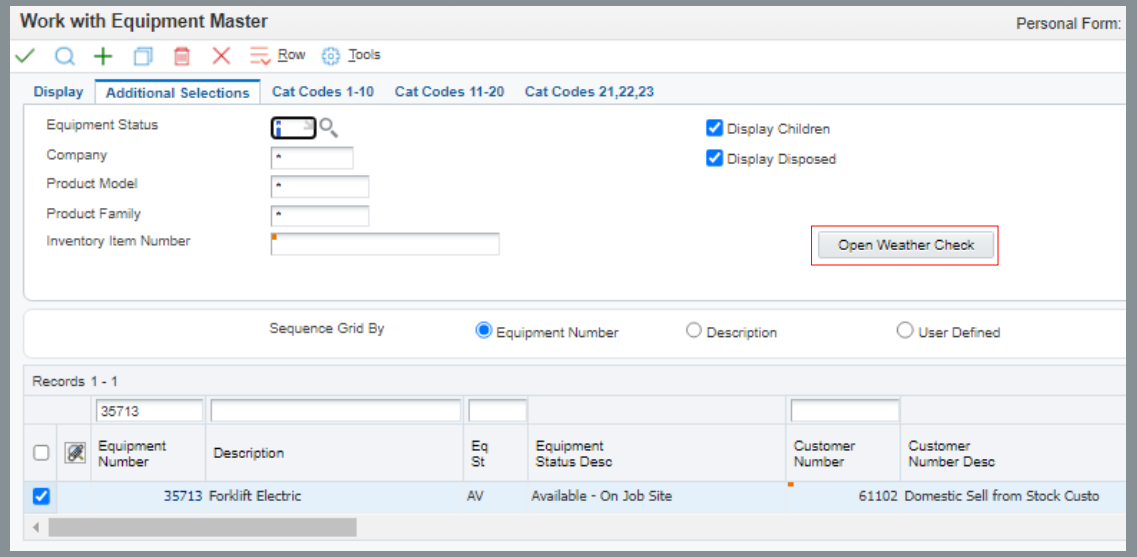
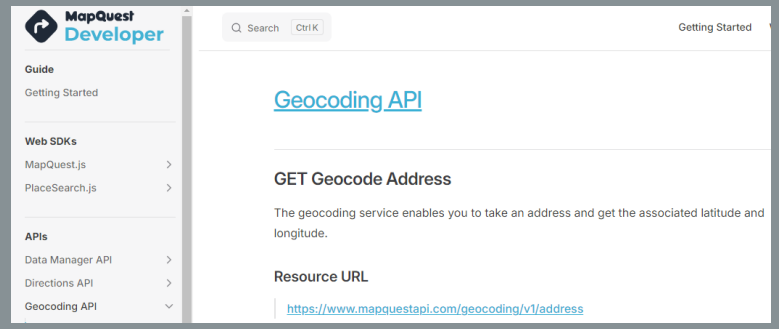
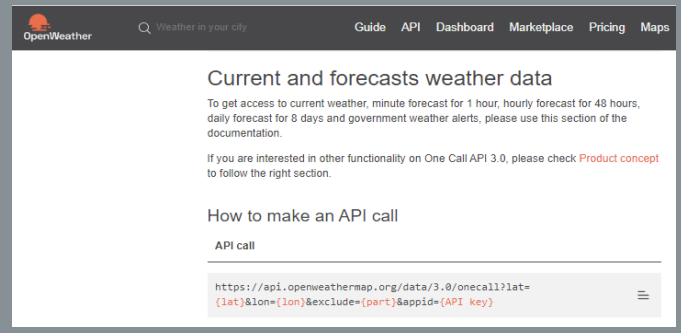
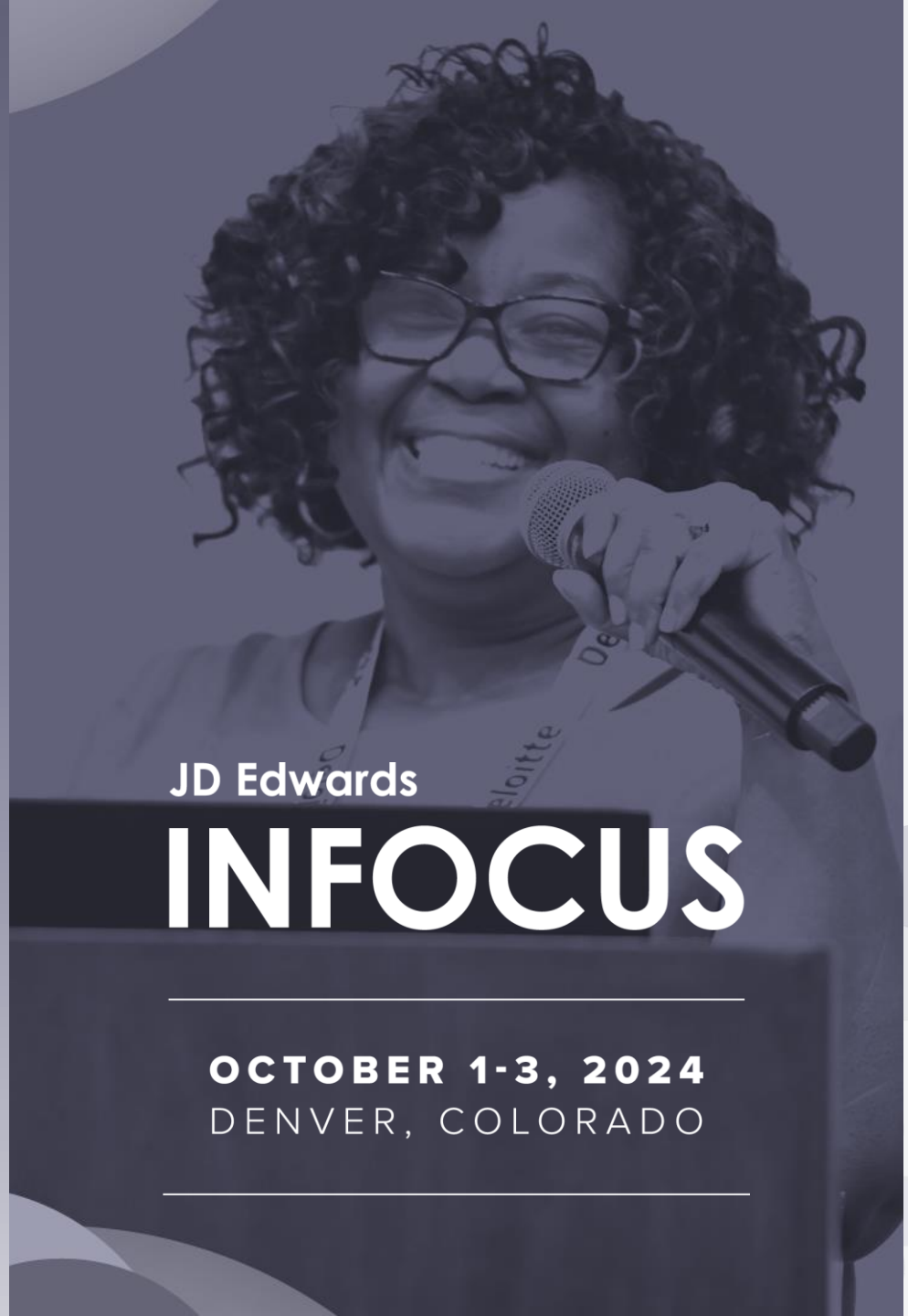
Demo – Generating Work Orders from External Systems

- Demo External System Triggers in E1 Orchestrations:
  - Call an Orchestration to check the weather based on Location Inquiry Details (e.g., address information associated to equipment), leveraging a MapQuest API service to obtain GeoCodes which are then inputs into the Open Weather API service that provides the weather forecasting service









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Quest
JD Edwards
Community