

# Unlock ultimate efficiency

Event-based Orchestrations for seamless business automation

JD Edwards

**INFOCUS**

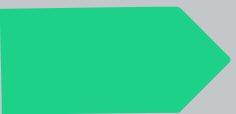
JD EDWARDS INFOCUS 2024

October 1 - 3, 2024

# 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\*



**72,858**  
people



**135+**  
countries



**\$7.45 bn**  
revenue

## UNITED STATES\*



**9,772**  
people



**46**  
offices



**\$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%**

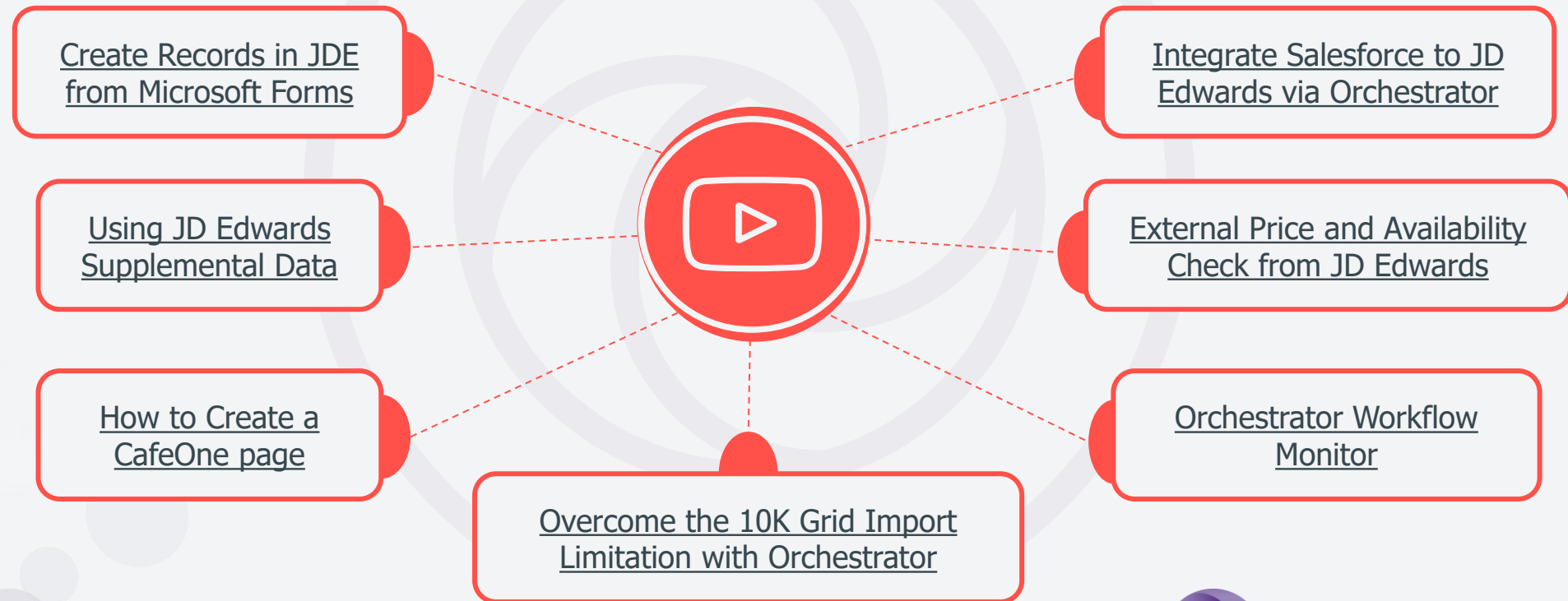
of the top underwriters have completed IPOs with us

# 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

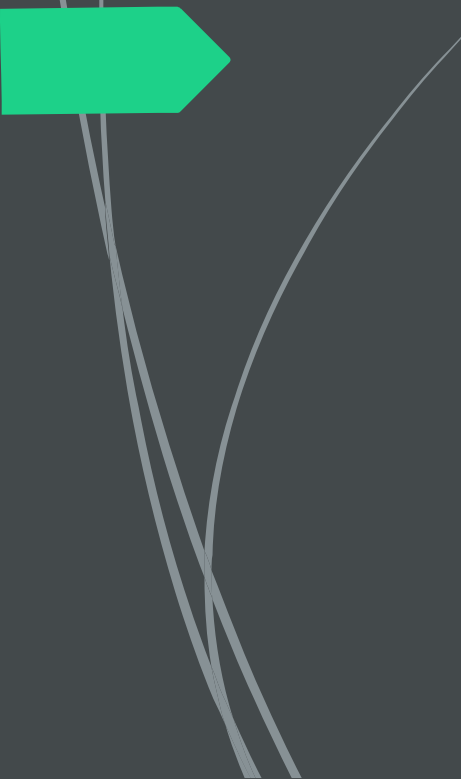
- ▶ The objectives of Enterprise Automation are to:
  - ▶ Expand the focus from individual transactions to the business as a whole
  - ▶ Make better use of existing data to reveal blind spots in a process
  - ▶ Define processes and data needed for better visibility and corrective actions



## Client use cases

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





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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.
  - 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

The screenshot shows the SAP 'Item Master - Item Master Revisions' form. The 'Item Number' field contains 'TFPM100167' and is highlighted with a red box. A line points from this box to the text 'Master Data output – next number generated'. The 'Item Number - Sht' field contains '125098'. The 'Basic Item Data' tab is active, showing fields for 'Catalog Number' (TFPM100167), 'Description \*' (6SKINNERS-W), and 'Description' (9000 SKINNER EXPORT BELLY). The 'Search Text' field contains 'PM' and is also highlighted with a red box. A line points from this box to the text 'ETL processes completed – Search Text transformed, Cost levels automated to appropriate values'. The 'Stocking Type \*' is set to 'E' (Emergency/Corrective Maint.). The 'Inventory Cost Level' is set to '2' (Item/Branch Only). The 'Sales Price Level' is set to '2' (Item/Branch Only). The 'Purchase Price Level' is set to '2' (Supplier/Item/Branch Level). The 'Commitment Method' is set to '1' (Location With Most Quantity). The 'Backorders Allowed' and 'Check Availability' checkboxes are checked.

# 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

Routing Revisions - Enter Routing Information

✓ ✖ ✕ ⚙ Form ⌵ Row 🖨 View ⚙ Tools

Item Number: TFPM100167 6SKINNERS-W Branch/Plant: STJ

Batch Quantity: EA

As of Date: 10/02/2024 Line/Cell: \* Routing Type: REP

Item Rev.: Drawing No: Skip to Oper.:

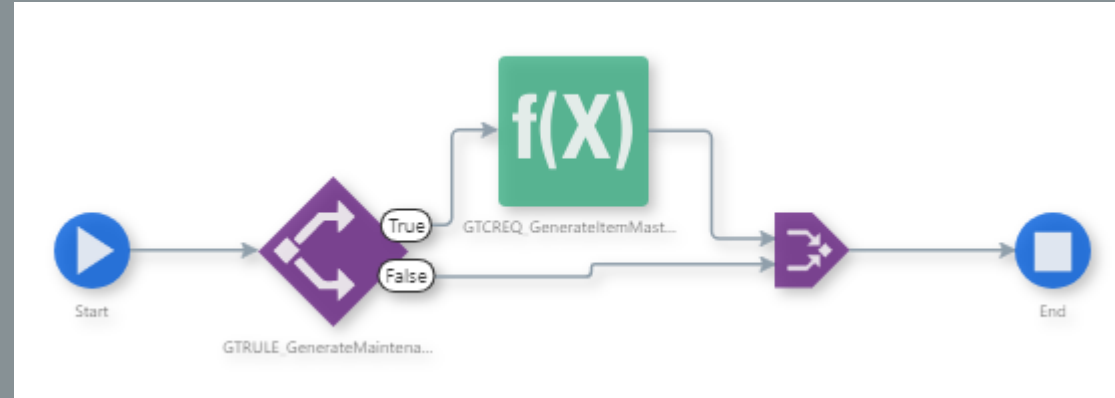
Records 1 - 2 PM Labor Router

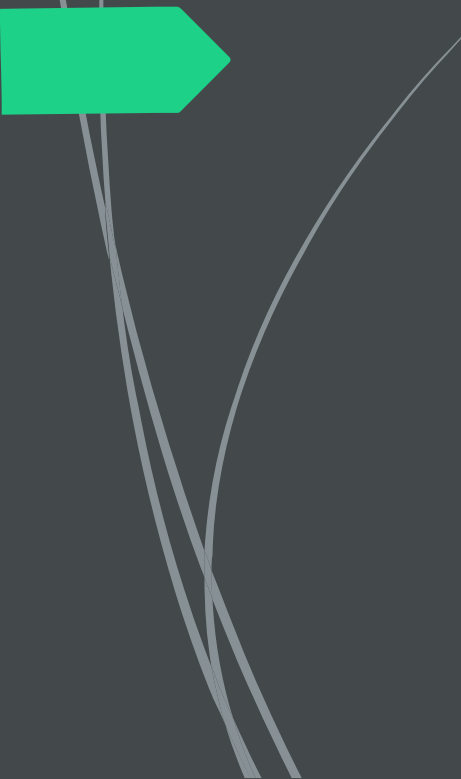
<input type="checkbox"/>	<input type="checkbox"/>	Work Center *	Oper Seq#	Description	Equipment Number	Effective From	Effective Thru	Crew Size	Employee Number
<input type="checkbox"/>	<input type="checkbox"/>	STJA1AUTO	1.00	6SKINNERS-W	32001035	01/01/2024	07/01/2049	1.0	

# Client use cases – Parent Item Master Creation

## Orchestration Components:

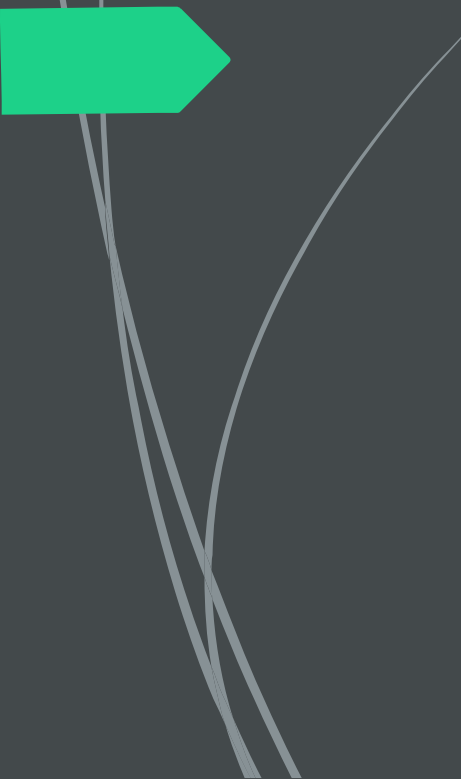
- A Rule object is called to identify if the Item Number field is null
- A Custom Service Request object identifies the business division that created the Master Data and assigns a Branch/Plant prefix and next number to the Item Number
- Additionally, Cost Level information is synced to the appropriate 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)

**Address Book Revision**

Work With Addresses | Address Book Revision

✓ ✗ ⚙ Form < > ⚙ Tools

Address Number: 11670

Address Book | Mailing | Additional 1 | Additional 2 | Related Address | Cat Code 1 - 10 | Cat Code 11 - 20 | Cat Code 21 - 30

Alpha Name \*: COJMYER-Jordan Myers (GT)

Long Address Number: [Empty]

Tax ID: [Empty]

Search Type \*: E Employees

Business Unit: 901 Vendor/Customer Cost Center



# 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.

### Address Book Revision

Work With Addresses | Address Book Revision

✓ ✕ ⚙ Form < > ⚙ Tools

Address Number: 11670

---

Address Book | Mailing | Additional 1 | Additional 2 | Related Address | Cat Code 1 - 10 | Cat Code 11 - 20 | Cat Code 21 - 30

Alpha Name \* COJMYER-Jordan Myers (GT)

Long Address Number

Tax ID: 111223551

Search Type \*  E Employees

Business Unit: 901 Vendor/Customer Cost Center

### Work With Service/Warranty Management Information

✓ + ✕ ⚙ Row ⚙ Tools

Customer Number: 11670 COJMYER-Jordan Myers (GT)

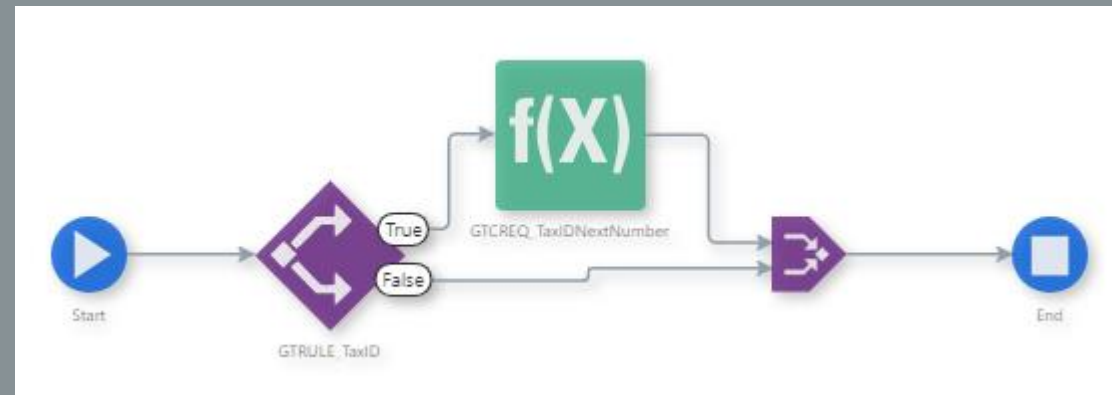
Records 1 - 2

	Information Type Description	Work Center	Work Center Description	Time Zone	Time Zone Description	Daylight Savings Rule
<input checked="" type="radio"/>	Service Provider			20	Central Time (US & Canada)	
<input type="radio"/>	Technician			20	Central Time (US & Canada)	

# 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



### Address Book Revision

Work With Addresses | Address Book Revision

✓ ✗ ⚙️ Form < > ⚙️ Tools

Address Number: 11870

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Address Book | Mailing | Additional 1 | Additional 2 | Related Address | Cat Code 1 - 10 | Cat Code 11 - 20 | Cat Code 21 - 30

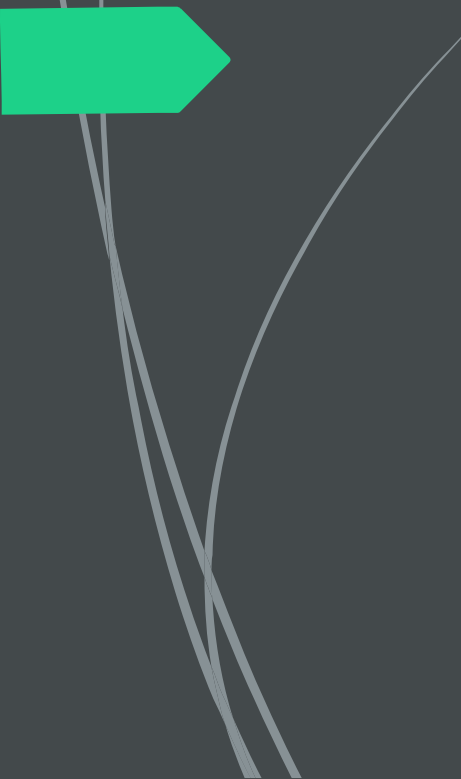
Alpha Name \*

Long Address Number

Tax ID

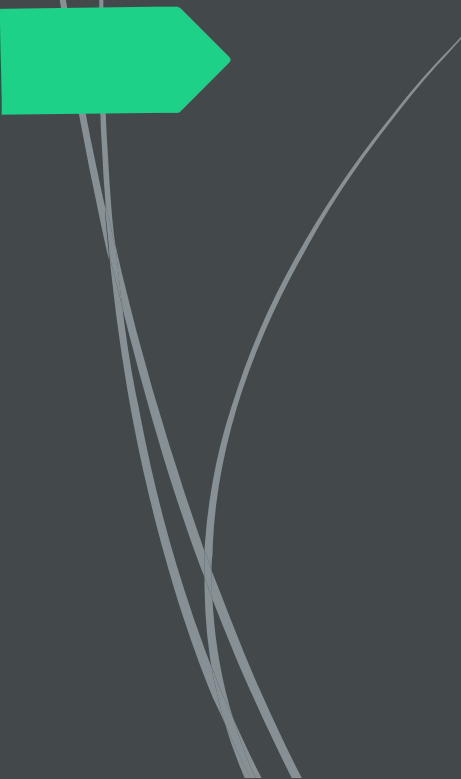
Search Type \*  Employees

Business Unit  Vendor/Customer Cost Center



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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

Planning Workbench - Search for Equipment Work Orders

Order Definition | People | Dates | Category Codes

Equipment Number:

Order Type: WM Maintenance Work Order

Type: \*

Priority: \*

Parent W.O. No: \*

Business Unit: \*

Lead Craft: \*

Craft:

Status:  MK

Reference:

Display Children  Include Models

Previous Order Number:

**WO Print**

Records 1 - 1

Order Number	Or Ty	Or Ty Description	W.O. Type	W.O. Type Description	WO St	WO St Description
906478	WM	SEAL IS LEAKING	1	Maintenance Order	MG	W/O Ready to Schedule

Work Order # 906478 - Print Job

PSFT\_Test@seaboardcorp.com  
To: ✓ Myers, Jordan

Retention Policy: Inbox 2 years (2 years) Expires

If there are problems with how this message is displayed, click here to view it in a web browser.

Work Order # 906478.pdf 14 KB

**Attention: EXTERNAL EMAIL**

**Beware of phishing attempts: Use caution with the links and attachments.**

Hello,

Please see Work Order 906478, attached.

Grant Thornton Work Order Print Date: 10/2/2024 Time: 11:56:12 Page: 1

Order Number: 906478 Description: SEAL IS LEAKING Parent WO No: 0000478 Business Unit: 901100 Subsidiary: SEAL IS LEAKING

Status Comment: 11001010 RECEIVING ALLEY/DOCK #10

Equipment No: A1A Originator: 11670 Jordan Myers (ST)

Crew Location: SS Supervisor: 11738 Trysten Tenney

Sublocation: SS Assigned To: 100060 TRIUMPH FOODS LLC

Priority: 4 Customer No: 2024-10-02 Start Date: 2024-10-02 Requested: 2024-10-02

Type: 1 Planned Comp: 2024-10-02 STJ

Status: MG Branch: TPEP00355 Item Number: 11001010 Reference:

Parts Number	Description	UM	Quantity Ordered	Issues	Material Notes			
Crew Detail								
Oper Seq	Emp Code	Equipment Number	Work Date	Name	Hours			
11001010		RECEIVING ALLEY/DOCK #10		Triumph Maintenance	S			
Equipment Parts List								
Level	Line Type	Item Number	Description	Standard Quantity	UM	UM Primary	Quantity on Hand	Source
Work Order Instruction: SEAL IS LEAKING 2024-10-02								
Maintenance Routes								
Service Type: Equipment Number Description								
Attachments								
Corrective WO Detail: SEAL IS LEAKING.								

# 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

Planning Workbench - Search for Equipment Work Orders

Order Definition | People | Dates | Category Codes

Equipment Number:

Order Type: WM Maintenance Work Order

Type:

Priority:

Parent W.O. No:

Business Unit:

Lead Craft:

Craft:

Status:  MK

Reference:

Display Children  Include Models

Previous Order Number:

**WO Print**

Records 1 - 1

Order Number	Or Ty	Or Ty Description	W.O. Type	W.O. Type Description	WO St	WO St Description
906478	WM	SEAL IS LEAKING	1	Maintenance Order	MG	W/O Ready to Schedule

Work Order # 906478 - Print Job

PSFT\_Test@seaboardcorp.com  
To: Myers, Jordan

Retention Policy: Inbox 2 years (2 years) Expires

[If there are problems with how this message is displayed, click here to view it in a web browser.](#)

Work Order # 906478.pdf  
14 KB

**Attention: EXTERNAL EMAIL**

**Beware of phishing attempts: Use caution with the links and attachments.**

Hello,

Please see Work Order 906478, attached.

Grant Thornton Work Order Print Date: 10/2/2024 Time: 11:56:12 Page: 1

Order Number: 906478 Description: SEAL IS LEAKING Parent WO No: 00006478 Business Unit: 9601100 Subsidary: SEAL IS LEAKING

Status Comment: 11001010 RECEIVING ALLEY/DOCK #10

Equipment No: A1A A1A RECEIVING ALLEY/DOCK #10 Originator: 11670 Jordan Myers (ST) Crew Location: SS SS Assigned To: 11738 Trysten Tenney Sublocation: SS SS Customer No: 100060 TRIUMPH FOODS LLC Priority: 4 Start Date: 2024-10-02 Requested: 2024-10-02 Type: 1 Planned Comp: 2024-10-02 Branch: STJ Item Number: TPEP00355 Status: MG Reference: 11001010

Parts Number	Description	UM	Quantity Ordered	Issues	Material Notes

Oper Seq	Emp Code	Equipment Number	Work Date	Name	Hours

Equipment Number	Equipment Description	Message From	Message Type	Operator
11001010	RECEIVING ALLEY/DOCK #10	Triumph Maintenance	S	SACHINK

Level	Line Type	Item Number	Description	Standard Quantity	UM	UM Primary	Quantity on Hand	Source

Work Order Instruction: SEAL IS LEAKING 2024-10-02

Maintenance Routes: Service Type: Equipment Number Description

Attachments: Corrective WO Detail: SEAL IS LEAKING.

# 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

### Service Provider Revisions

Inactive  
 Provider Number: 11870 *COJMYER-Jordan Myers (GT)*  
 ACD Extension:   
 Mail Box Designator: 01 *Personal In Basket*  
 Pager/E-mail Address:   
 Service Group:   
 Work Center:   
 Time Zone: 20 *Central Time (US & Canada)*  
 Daylight Savings Rule:

**Default Account Number** | **Adjustment Schedules** | **Payment/Pricing**  
 Home Business Unit: 901 *Vendor/Customer Cost Center*

Grant Thornton **Work Order Print** Date: 10/2/2024  
Time: 11:56:12  
Page: 1

**Order Number:** 906478  
**Description:** SEAL IS LEAKING  
**Parent WO No:** 0000478  
**Business Unit:** 9601100  
**Subsidiary:**

**Status Comment:**  
**Equipment No:** 11001010 RECEIVING ALLEY/DOCK #10  
**Crew:** A1A  
**Location:** SS  
**Sublocation:** 4  
**Priority:** 1  
**Type:** MG  
**Status:**

**Originator:** 11870 Jordan Myers (GT)  
**Supervisor:** 11736 Trysten Terney  
**Assigned To:** 100980 TRIUMPH FOODS LLC  
**Customer No:** 2024-10-02  
**Start Date:** 2024-10-02  
**Planned Comp:** STJ  
**Requested:** 2024-10-02  
**Branch:** TFEP00355  
**Item Number:** 11001010  
**Reference:**

Parts Number	Description	UM	Quantity Ordered	Issues	Material Notes

Oper Seq	Emp Code	Equipment Number	Work Date	Name	Hours

Equipment Number	Equipment Description	Message From	Message Type	Operator
11001010	RECEIVING ALLEY/DOCK #10	Trumpf Maintenance	S	SACHINK

Level	Line Type	Item Number	Description	Standard Quantity	UM	UM Primary	Quantity on Hand	Source

**Work Order Instruction:** SEAL IS LEAKING 2024-10-02  
**Maintenance Routes:**  
**Service Type:**  
**Equipment Number:** Description

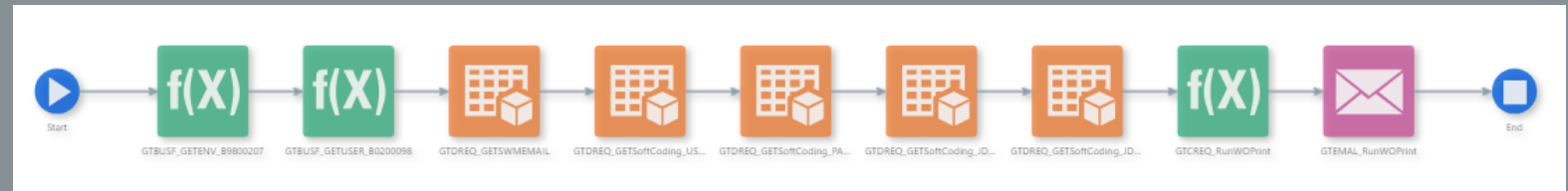
**Attachments:**  
**Corrective WO Detail:** SEAL IS LEAKING.

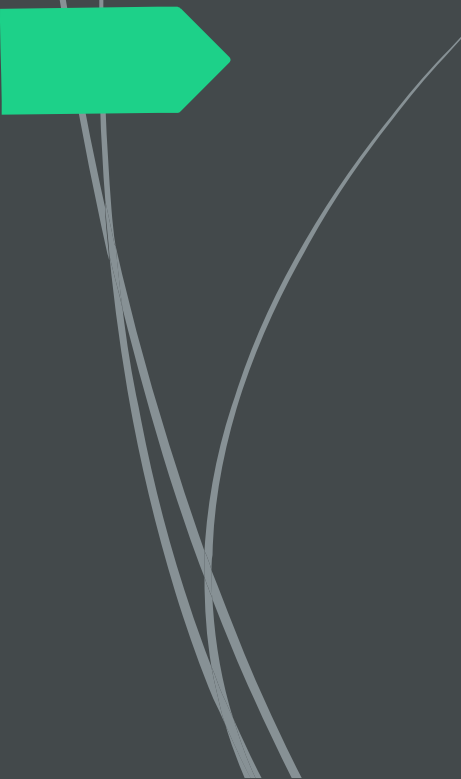
### Custom

Name: GTBUSF\_GETUSER\_B0200098  
 Description: GTBUSF\_GETUSER\_B0200098  
 Product Code: 58 - Reserved for Clients  
 Category:  Share

Function Object Name: B0200098  
 Function Name: F0092 Get User ID and Address Book Number  
 Fire and Forget:

ID	Name	Description	Required	Input	Input Variable	Default Value	Return	Output Variable
1	szUserId	User ID (USER)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	szUserId
2	mnAddressNumber	Address Number (AN8)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		<input checked="" type="checkbox"/>	mnAddressNumber

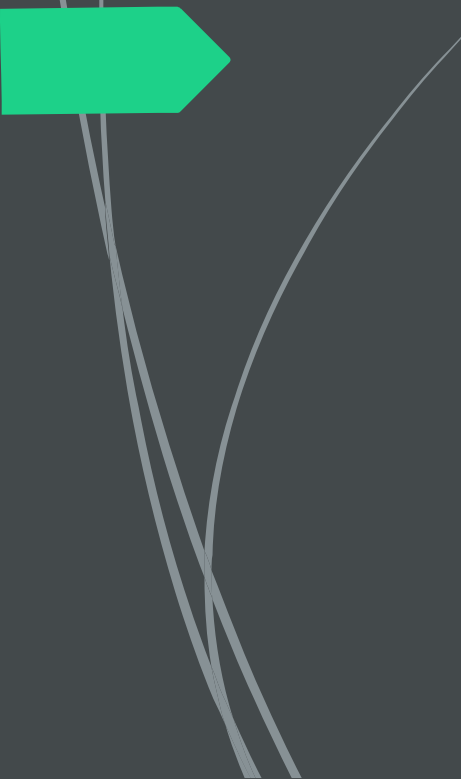




## Client use cases

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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

**Work Order Request - Self Service**

✓ ✕ ⚙ Tools

**Customer/Equipment Information**

Customer	100960	Phone	816	396-2700
Contact Name	[REDACTED]	Crew	A1A	
Equipment Number	11001010	Reference		
Inventory Item Number	TFEP00355			
Failure Description *	SEAL IS LEAKING			
Requested Finish Date	10/02/2024			

Text1 [v] 🔍

🖨️ 👁️ ↶ ↷ 🔍 Paragraph [v] **B** *I* U 🔗 *T<sub>x</sub>* 🔗 ⋮ ⋮ ⋮

SEAL IS LEAKING

**Responsible Persons**

Crew	11811	STJA1AUTO
Lead Craft	STJA1AUTO	AUTOMATION
Supervisor	11738	TFTTENI-Trysten Tenney

**Labor Detail**

More Form Actions: [ Select One ] [v] [>] More Row Actions: [ Assignment Detail ] [v] [>>]

Records 1 - 2

	Work Center	Oper Seq#	Op St	Description	Run Machine	Estimated Hours	Actual Hours
●	STJA1AUTO	1.00		SEAL IS LEAKING			
○							

# 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

**Responsible Persons**

Crew	11811	STJA1AUTO
Lead Craft	STJA1AUTO	AUTOMATION
Supervisor	11736	TFTENN-Trysten Tenney

**Labor Detail**

More Form Actions:  More Row Actions:

Records 1 - 2

<input type="checkbox"/>	Work Center	Oper Seq#	Op St	Description	Run Machine	Estimated Hours	Actual Hours
<input checked="" type="checkbox"/>	STJA1AUTO	1.00		SEAL IS LEAKING			
<input type="checkbox"/>							

**Planning Workbench - Resource Assignment Detail**

Business Unit: STJA1AUTO Op Sequence: 1.00 SEAL IS LEAKING  
Planned Start Date: 10/02/2024 Planned Finish Date: 10/02/2024  
Est. Labor Hours: Est. Machine Hours: Crew Size: 1.0

Assigned Hours:

Records 1 - 2

<input type="checkbox"/>	Resource Type	Resource Number	Description
<input checked="" type="checkbox"/>	01		
<input type="checkbox"/>			

**Planning Workbench - Resource Master Search & Select**

Crew: 11811 STJA1AUTO  
Supervisor: \*  
Resource Type: 01 Individual  
Resource Number: \*

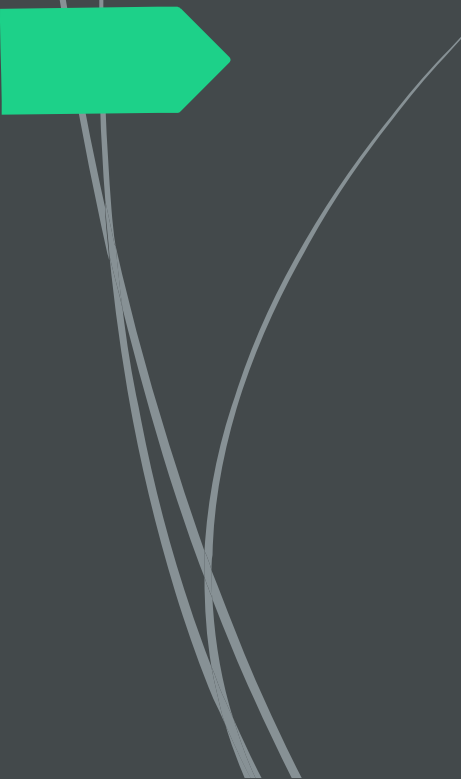
Records 1 - 6

<input type="checkbox"/>	Resource Type	Resource Type Description	Resource Number	Description	Site
<input checked="" type="checkbox"/>	01	Individual	11736	TFTENN-Trysten Tenney	960
<input type="checkbox"/>	01	Individual	11838	GAY, JON	960
<input type="checkbox"/>	01	Individual	11839	OHLENSEHLEN, BRYAN	960
<input type="checkbox"/>	01	Individual	11840	ARROYO, FRANCISCO	960
<input type="checkbox"/>	01	Individual	11841	EVANS, RONNIE	960
<input type="checkbox"/>	01	Individual	11856	CARRERA, FRANCISCO	960

# 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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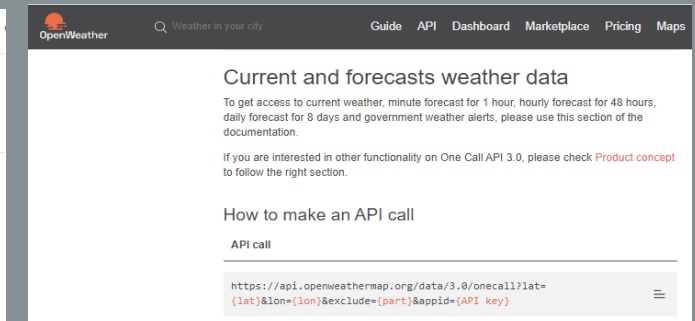
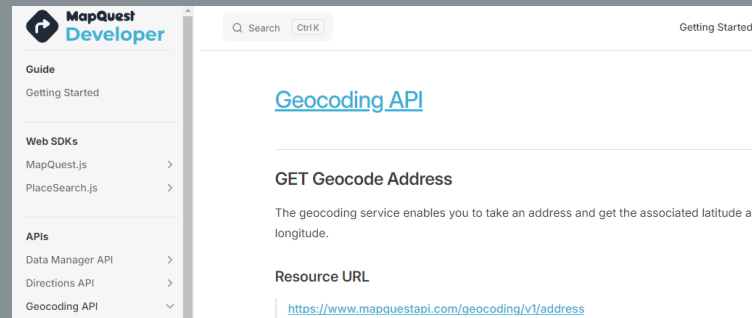
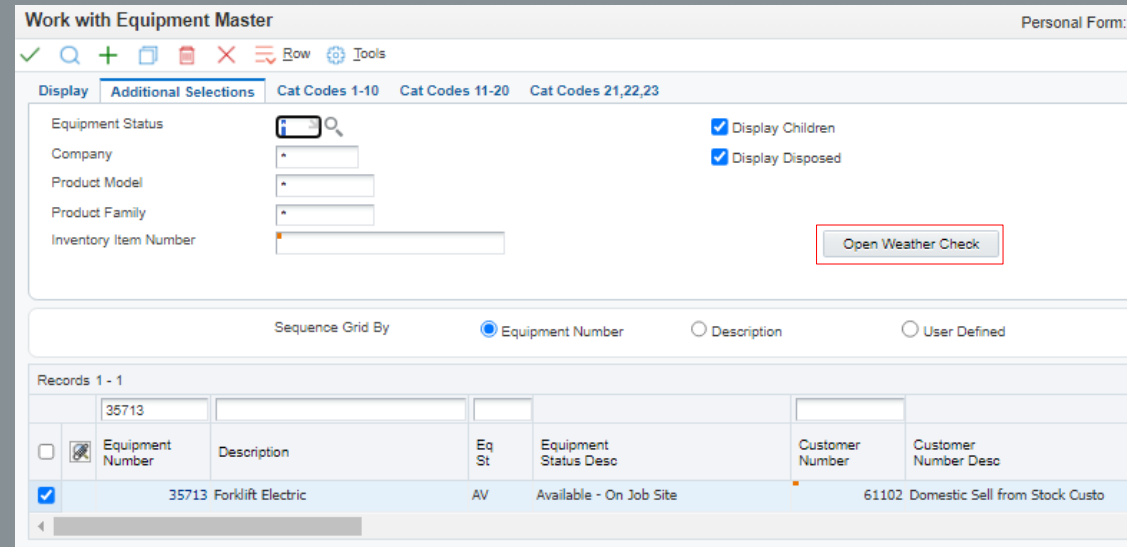


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- ▶ Work Order Entry Defaults
- ▶ DEMO: Generating Work Orders from External Systems

# 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





JD Edwards

# INFOCUS

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**OCTOBER 1-3, 2024**  
DENVER, COLORADO

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Contact me:

[Jordan.Myers@us.gt.com](mailto:Jordan.Myers@us.gt.com)

Session ID:

**P-049371**



Quest  
JD Edwards  
Community