

# Give your Order To Cash and Procure To Pay a fresh look!

Session ID: P-049590

# Agenda

- About the Presenter and Syntax
- Overview
- Order To Cash
- Procure To Pay
- Components & Configuration Needed
- Steps to Implement Out-of-the-box Content
- Steps to Customize Out-of-the-box Content
- Q&A

# Meet the Presenter



## Jerry Salazar

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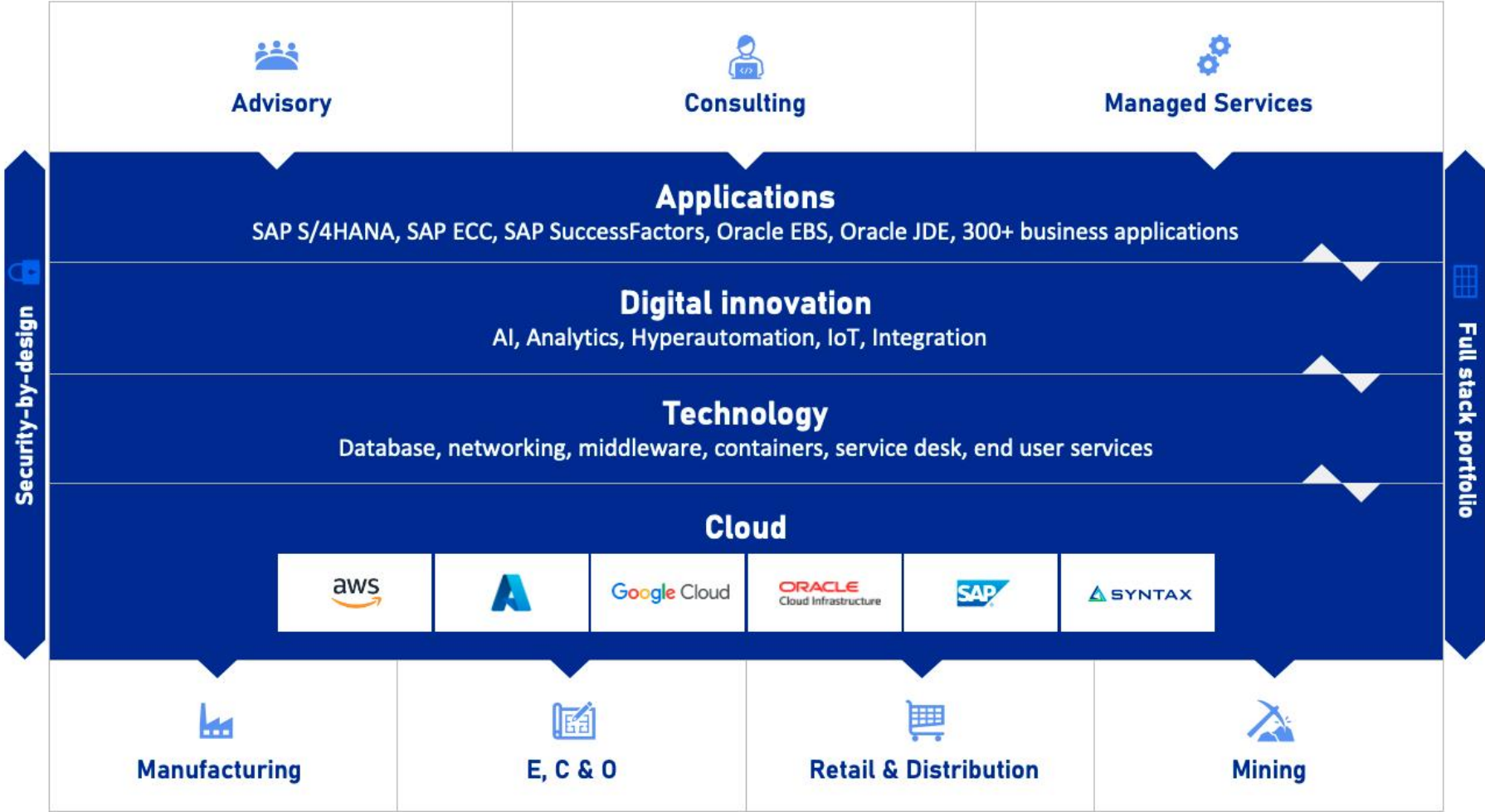
Principal Consultant and Project Manager  
**Syntax**

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- Over 25 years of JD Edwards Experience, Functional, Technical and Project Management
  - JD Edwards Implementations and Upgrades across all Modules
  - Orchestrator Training
  - Presales Support
  - Started JDE career as Developer, back in 1992
-

# Our profile

A global provider of mission-critical application services in the cloud



26  
Offices

15  
Countries

52+  
Years of experience and leadership

2,800  
Technology and business professionals

4   
Major languages in which business is conducted at scale

900+  
Mid-market and large enterprise customers

# Oracle-Certified Capabilities

## Oracle Partner Network

15K+

Managed Systems

950+

Employee Oracle Certifications

350+

Successful Cloud Migrations

### Infrastructure

ORACLE | Sell Partner

Expertise in  
Oracle Cloud Platform  
in North America

ORACLE | Service Partner

Expertise in  
Cloud Service Solution  
OCI Migration  
in NAMER-North America

### Platform

ORACLE | Service Partner

Expertise in  
CSPE: Oracle Cloud Platform -  
Oracle Database to Oracle Cloud  
in North America

ORACLE | Service Partner

Expertise in  
CSPE: Oracle Cloud Platform -  
Oracle Cloud Platform  
Data Management  
in North America

ORACLE | Service Partner

Expertise in  
Oracle Cloud Platform -  
Oracle Cloud Platform Integration  
in North America

### Packaged Applications

ORACLE | Service Partner

Expertise in  
JD Edwards Applications  
to Oracle Cloud  
in North America

ORACLE | Service Partner

Expertise in  
Oracle E-Business Suite  
Applications to Oracle Cloud  
in North America

### Fusion Applications

ORACLE | Sell Partner

Expertise in  
Oracle ERP Cloud  
in North America

ORACLE | Sell Partner

Expertise in  
Oracle SCM Cloud  
in North America



# Syntax cloud capabilities

Syntax expertise transcends multiple services across **multiple cloud environments**. Our approach ensures that your business has choice to shift as your business evolves and embraces the **hybrid cloud** paradigm. Ensuring digital transformation of over **900** organizations.

Generative AI	Data lakes & Analytics	Internet of Things (IoT)	End User Services
Security & Compliance	Governance	FinOps	Disaster Recovery
Compute	Storage	Networking	Database

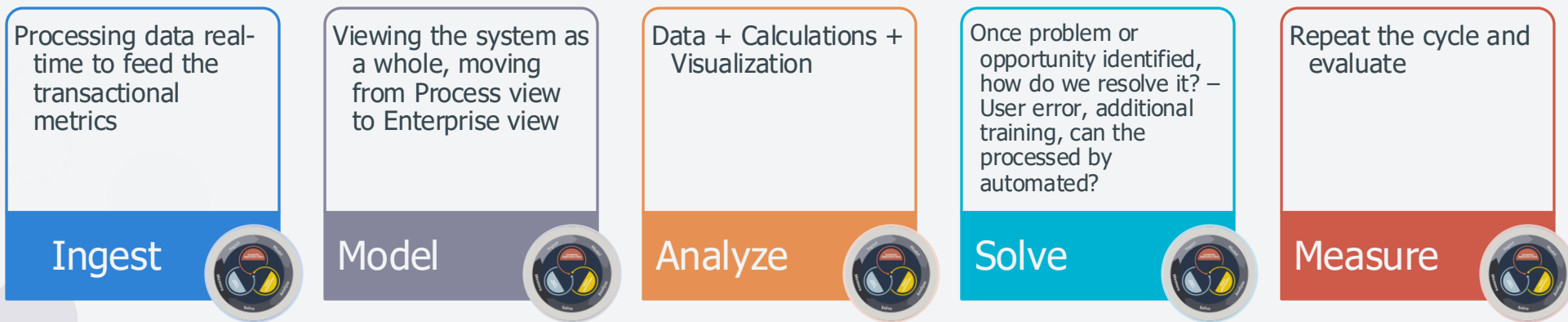


# Overview



# Overview

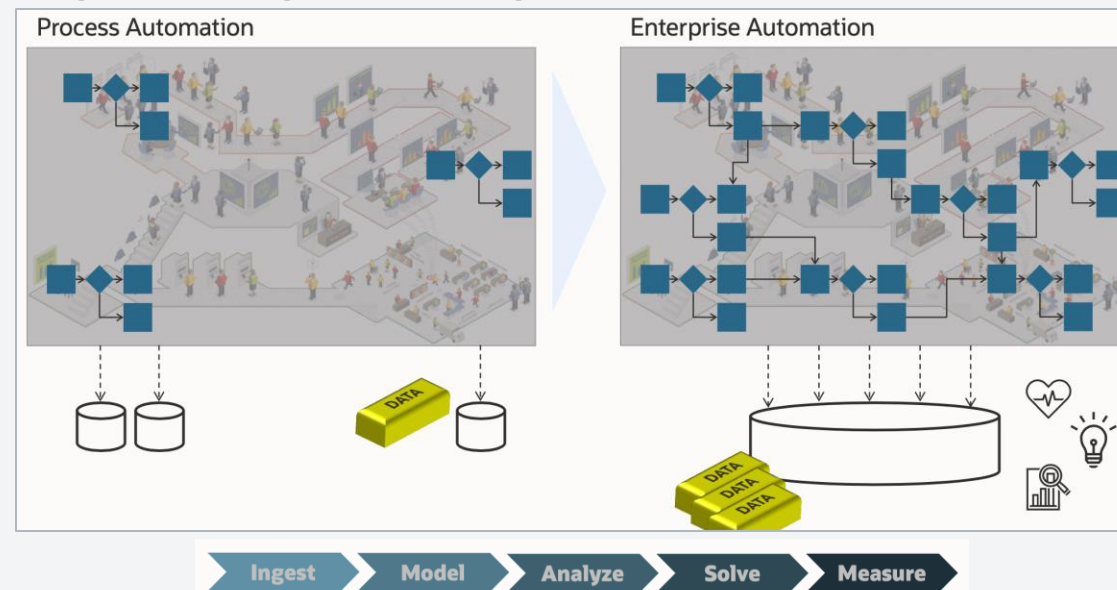
- Historically, we have improved the business cycle of Order to Cash or Procure to Pay by using custom reports, advanced queries, notifications (watchlist), and other custom solutions.
- In Release 24, Oracle has introduced a set of new features to help you improving the enterprise-wide operations through data visualization and integrated data processing. These enhancements are part of Oracle's Enterprise Automation framework: **ingest, model, analyze, solve and measure**.





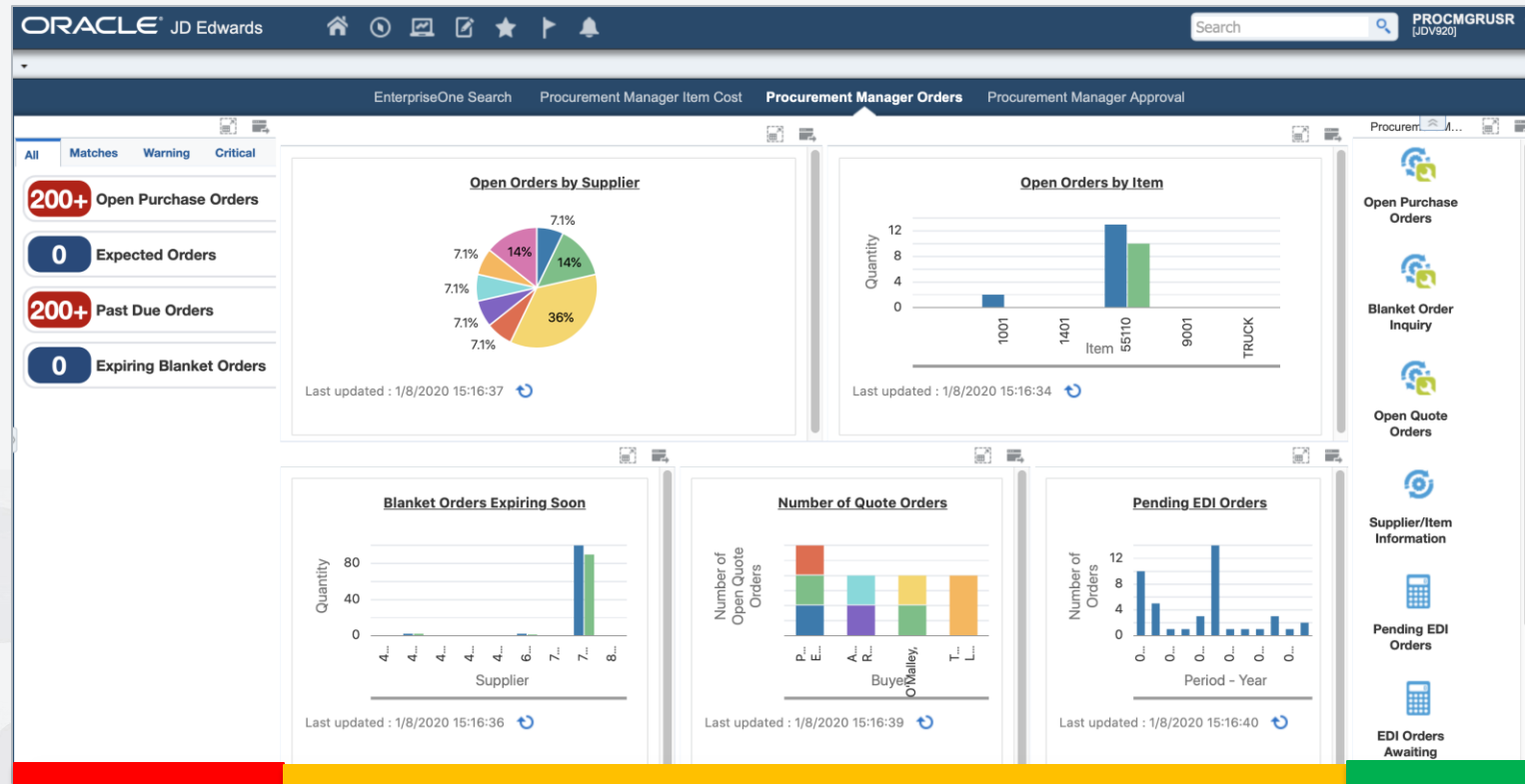
# Objectives

- Expand the focus from individual transactions to the business as a whole, allowing business owners to gain a comprehensive understanding of their operations.
- Optimize the utilization of existing data to identify inefficiencies in their business process. This is critical for improving operational performance and gaining a competitive edge.
- Define or change processes and data needs, for better visibility and ongoing corrective actions: reengineering, training, automation, etc.



# What's Available before Release 24?

- UX One – Composed Pages
  - Available since TR 9.2



52 Role Based  
Landing Pages  
Delivered

- ✓ Easy, Intuitive  
and Modern UX
- ✓ Configurable  
and Personalize

## ALERT

Focus on conditions  
requiring attention

## ANALYZE

Analyze data through  
graphical charts

## ACT

Navigate to source  
applications to take  
actions

# Enterprise Automation

# Order To Cash



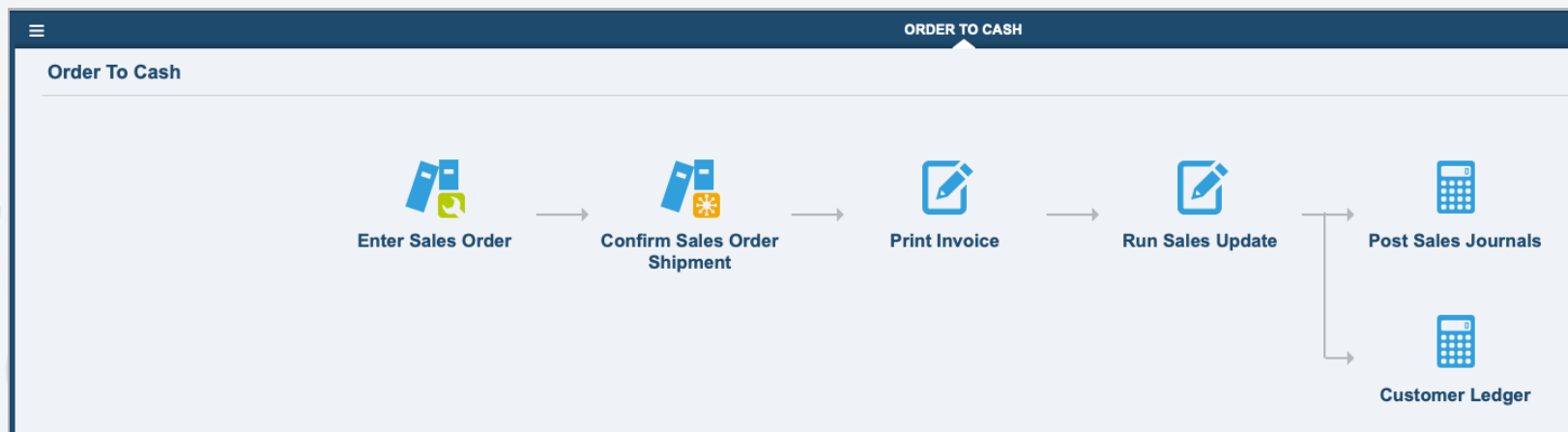
# What's Available before Release 24?

## ► Classic EnterpriseOne Pages

- Available since TR 9.1.2 - Doc ID 1674258.2
- Version 1

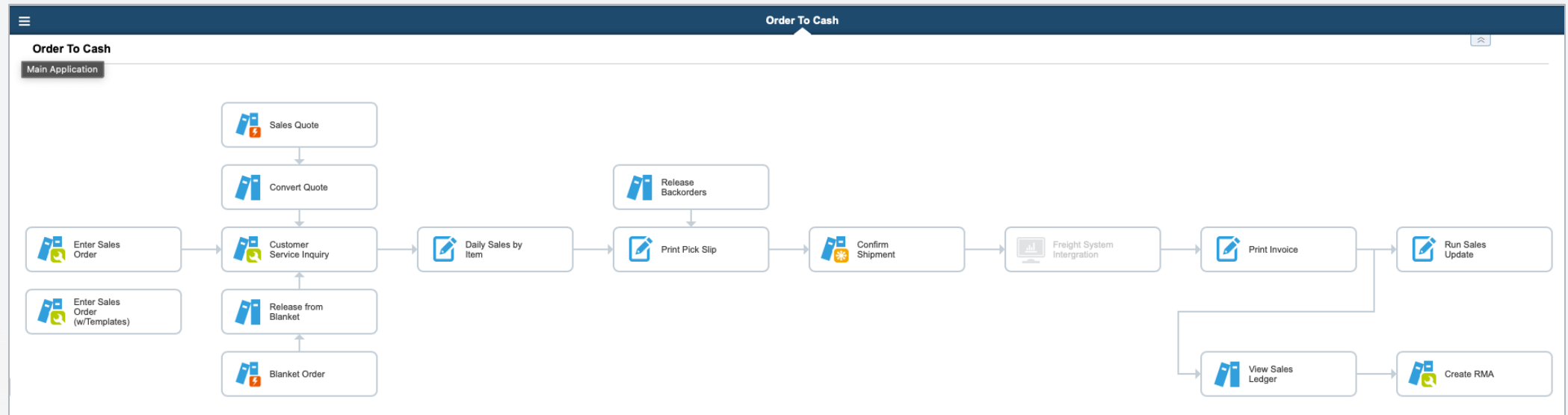


## ► Version 2 – using a new version of Generator



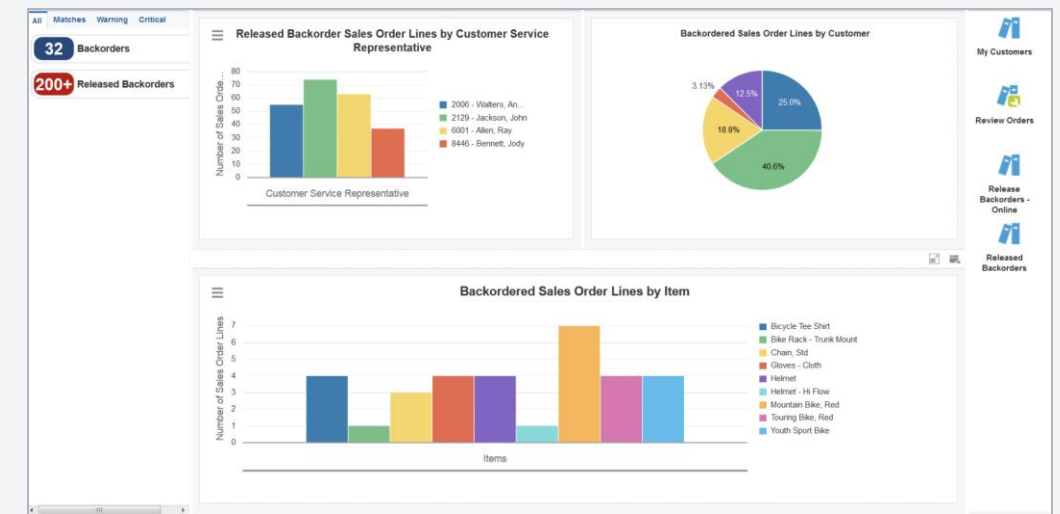
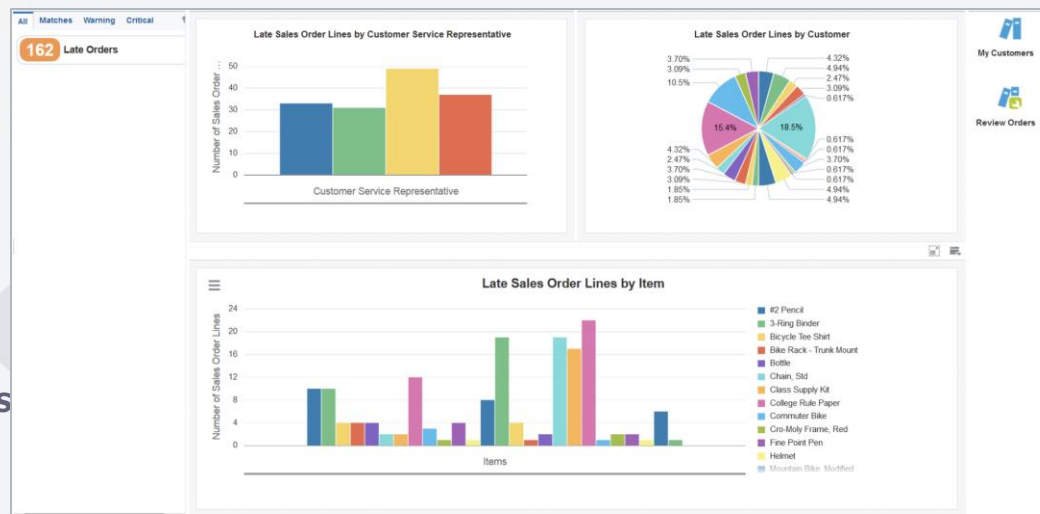
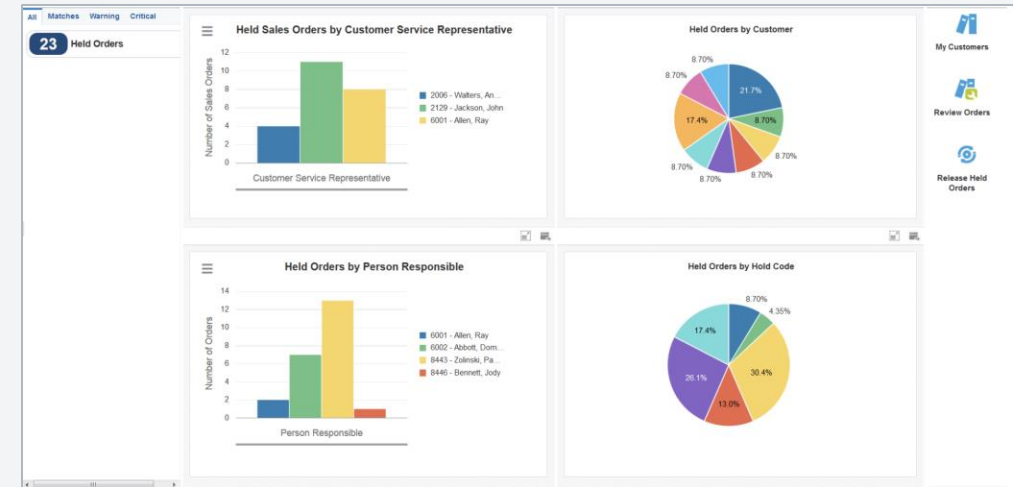
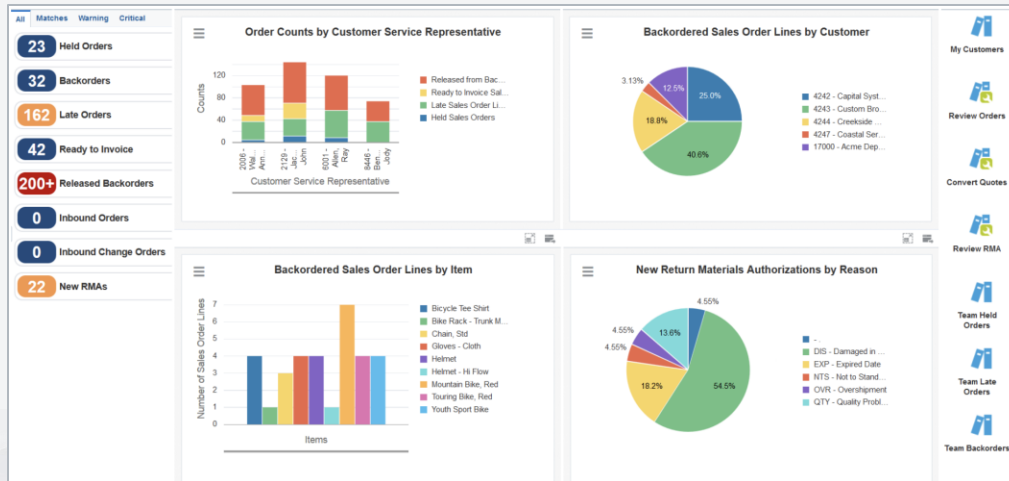
# What's Available before Release 24?

- Classic EnterpriseOne Pages
  - Custom Version – including additional business processes



# What's Available before Release 24?

- UXOne for Sales: (2) Pre-configured Roles, (4) Composed Pages
  - CSMGRJDE – Customer Service Manager
  - CSRJDE – Customer Service Representative

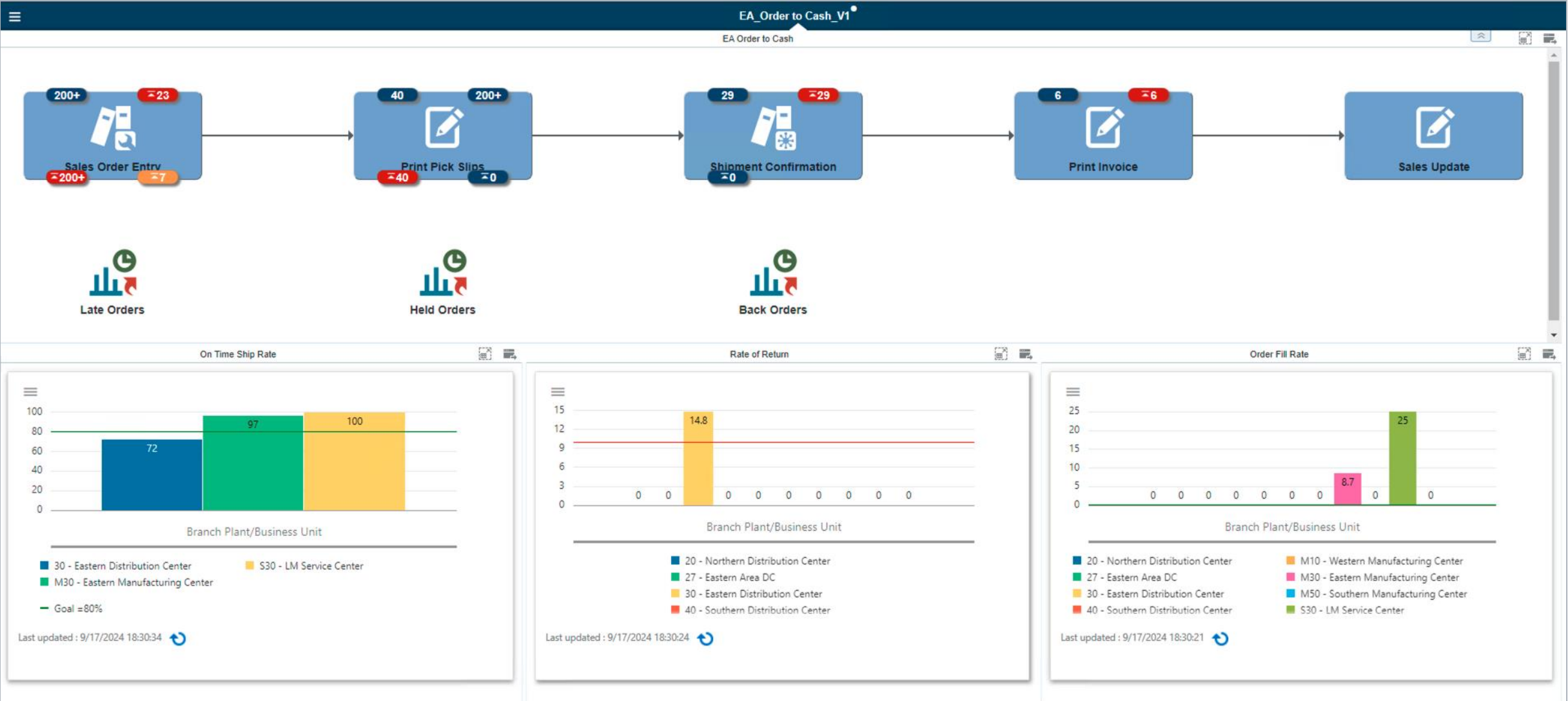




# Release 24 New Features!

- These new features are intended to help customers to improve their enterprise-wide operations through integrated automation and data visualization.
- Key capabilities include:
  - ✓ EnterpriseOne Page of the Order to Cash process flow that represents the order fulfillment workflow
  - ✓ Watchlists that monitor real-time movement of sales orders through the order fulfillment process, with attention to orders that are late, on hold, and approaching the threshold of becoming late at key stages of the process.
  - ✓ New charts and graphs that represents KPI metrics related to the health of the order to cash process flow. For example, KPIs such as:
    - On-time ready to ship
    - Rate of returns
  - ✓ Links to existing UX One pages that provide insight regarding backorders, late, and held orders.
  - ✓ Links to new charts and graphs.

# Order To Cash

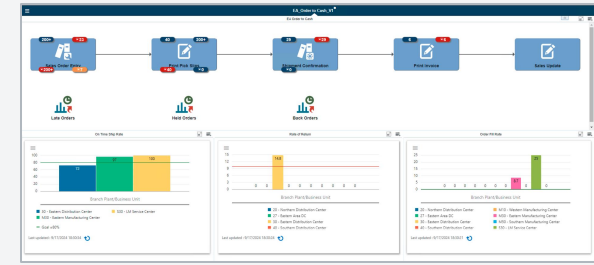


# Order To Cash

## ➤ P42102X – New Analytic Page

### ➤ To access:

- Navigate to EnterpriseOne Menus → Order Management → Sales Order Management → Enterprise Automation (G42EA) → Sales Process
- Select My Content under the Personalization category, and then My Pages. Select the **EA\_Order to Cash** check box and click Save.



# Order To Cash

## ➤ Workflow (a typical end-to-end process flow for the Order to Cash)

- Order Entry (P4210)
- Print Pick Slip (R42520)
- Shipment Confirmation (P4205)
- Print Invoice (R42565)
- Sales Update (R42800)

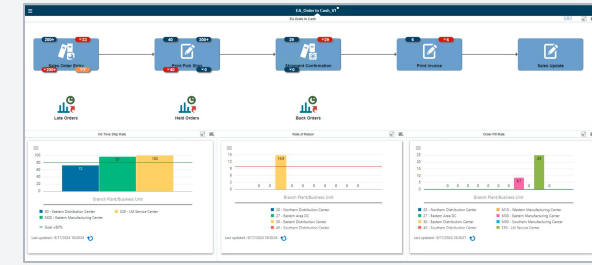


## ➤ Watchlists

- There are watchlists on the tile that gives a quick insight to sales supervisor or manager on critical and important metrics related to the process step associated to the specific business process.
- For example, from the P4210
  - Total Orders to Fulfill
  - Orders on Hold
  - Late Orders
  - Prioritizes Orders

## ➤ Links to UXOne Pages

- The composed page includes useful links to other UXOne Composed Pages.
  - Late Orders (P42002X|W42002XB)
  - Held Orders (P42002X|W42002XC)
  - Back Orders (P42002X|W42002XD)



# Order To Cash

## ► Workflow and Watchlists complete list

Tile	Associated Watchlist Title	Watchlist Description
<b>Sales Order Entry (P4210)</b>	Total Number of Orders to Fulfill	Total Number of Orders to Fulfill is the count of all the sales order lines which are at sale order entry status.
	Orders on Hold	Orders on Hold is the count of all sales order lines with a hold code.
	Late Orders	Late Orders is the count of all sales order lines where the current date is greater than the promised ship date.
	Prioritized Orders	Prioritized Orders is the count of sales order lines where the promised ship date is approaching. You define how many days prior to the promise ship date as the threshold.
<b>Print Pick Slips (R42520)</b>	Total Orders to Run Pick Slip	Total Orders to Run Pick Slip is the count of all sales order lines that are ready to pick.
	Released Backorders	Released Backorders is the count of sales order lines that the system released from backorder and ready to pick.
	Late Orders to Run Pick Slip	Late Orders to Run Pick Slip is the count of all sales order lines where the current date is greater than the promised ship date.
	Pick Slip Prioritized Orders	Pick Slip Prioritized Orders is the count of sales order lines where the promised ship date is approaching. You define how many days prior to the promise ship date as the threshold.
<b>Shipment Confirmation (P4205)</b>	Total Orders to be Confirmed	Total Orders to be Confirmed is the count of the total number of sales order lines to be confirmed.
	Late Orders to be Confirmed	Late Orders to be Confirmed is the count of all sales order lines where the current date is greater than the promised ship date.
	Ship Conf Prioritized Orders	Ship Conf Prioritized Orders is the count of the sales order lines where the current date is prior to the promised ship date.
<b>Print Invoice (R42565)</b>	Ready to Invoice	Ready to Invoice is the count of the number of ready to invoice sales order lines.
	Late Orders Ready to Invoice	Late Orders Ready to Invoice is the count of the sales order lines where the current date is greater than the promised ship date.
<b>Sales Update (R42800)</b>		

# Order To Cash

## ► KPIs

### ► On-Time Ship Rate

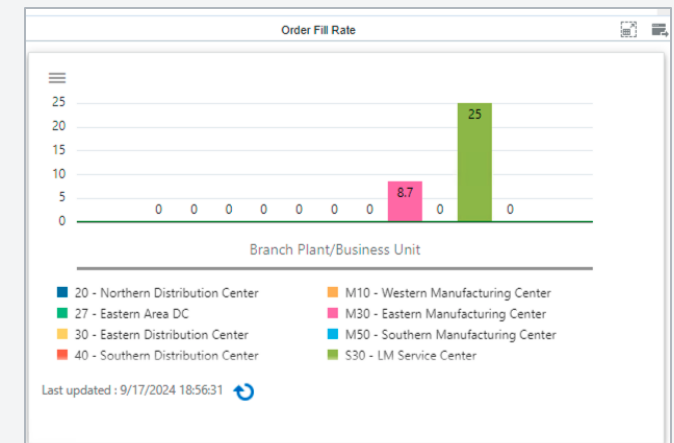
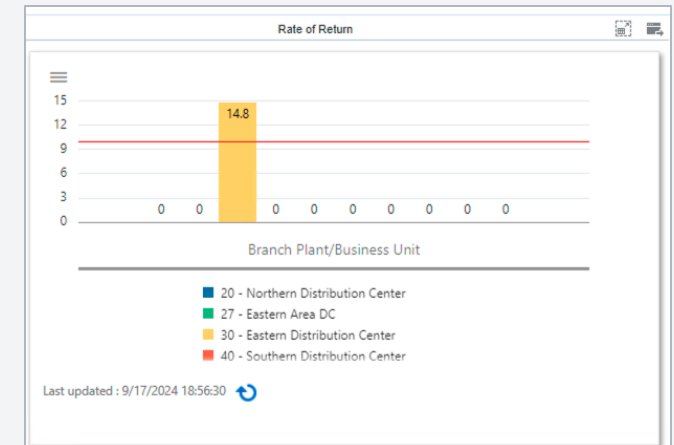
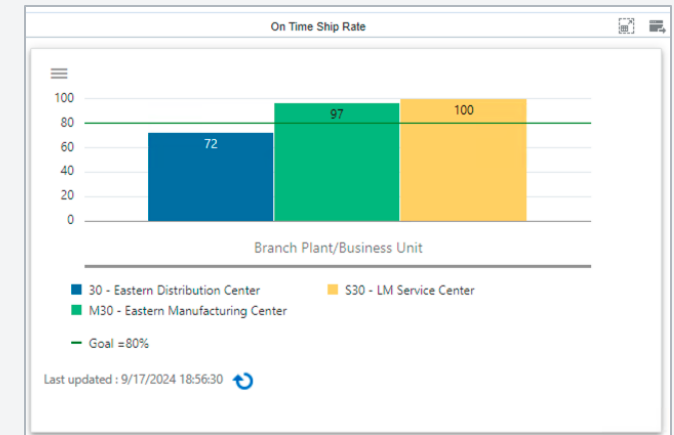
- KPI that indicates the percentage of orders that are prepared and ready to ship on or before the promised ship date within a specified period.
- On-Time Ship Rate = (Number of sales order lines shipped on time / Total sales order lines shipped over selected period) × 100
- Data from P42101 – Sales Order (F4211/F42119)

### ► Rate of Return

- KPI that indicate the percentage of orders returned within the given timeframe.
- Rate of Return = (Number of credit orders by order date / Total number of orders by order date in the selected date range) X 100
- Data from P42101 – Sales Order (F4211/F42119)

### ► Order Fill Rate

- KPI that indicate the percentage of orders shipped completely without any items having to be backordered.
- Order Fill Rate = (Number of orders shipped without history of backorder / Number of orders placed) X 100
- Data from P42025 – Sales Ledger (F42199)



# Procure To Pay

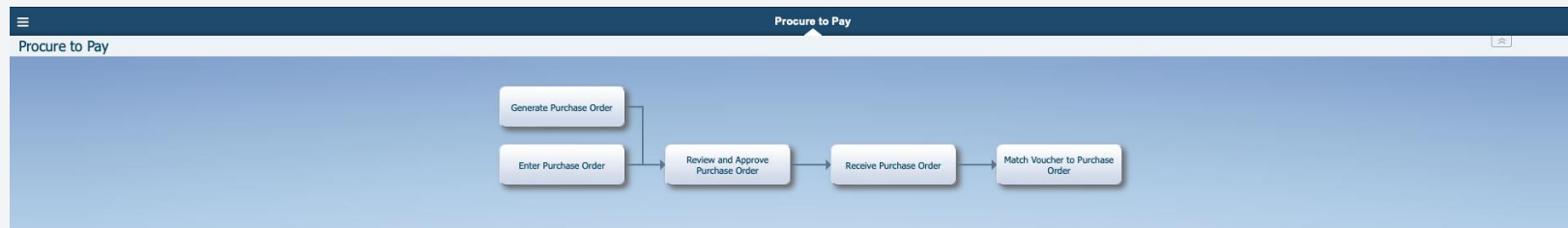




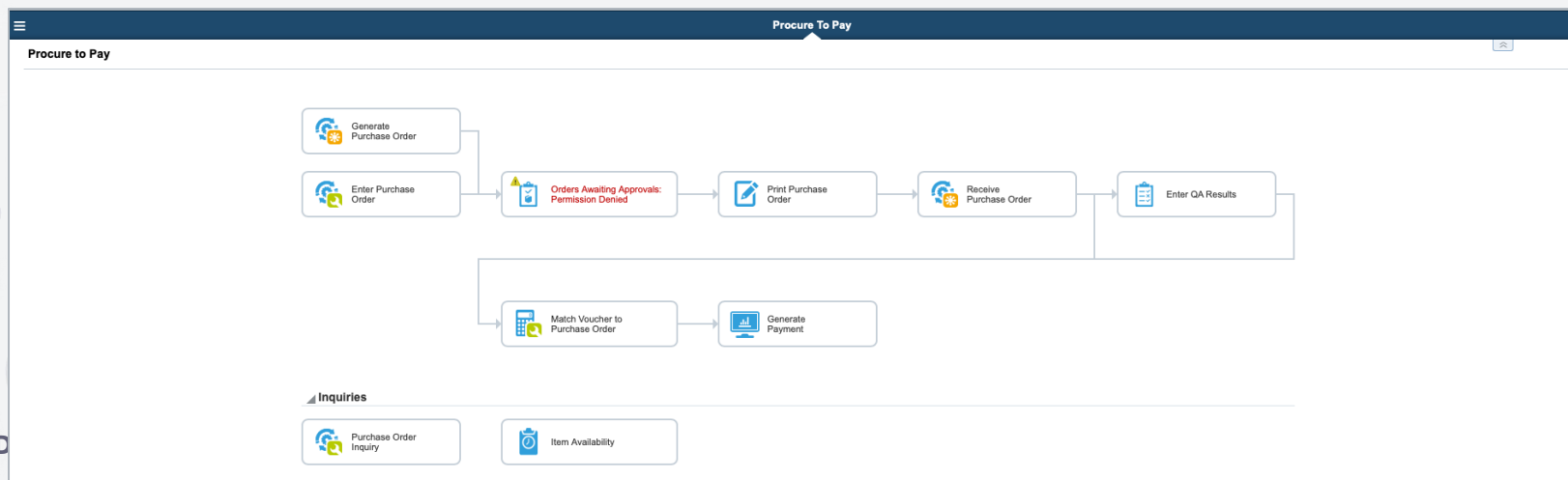
# What's Available before Release 24?

## ► Classic EnterpriseOne Pages

- Available since TR 9.1.2 - Doc ID 1674258.2
- Version 1

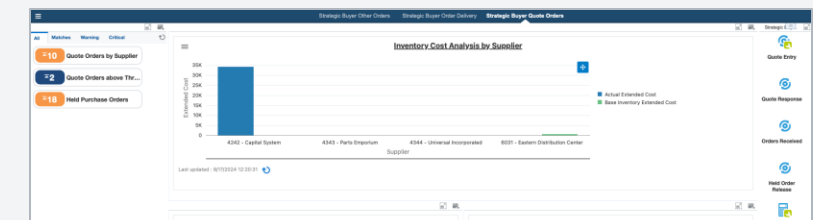
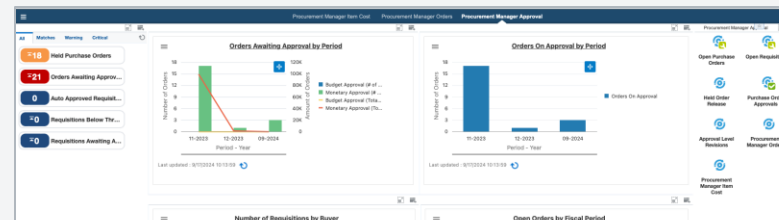
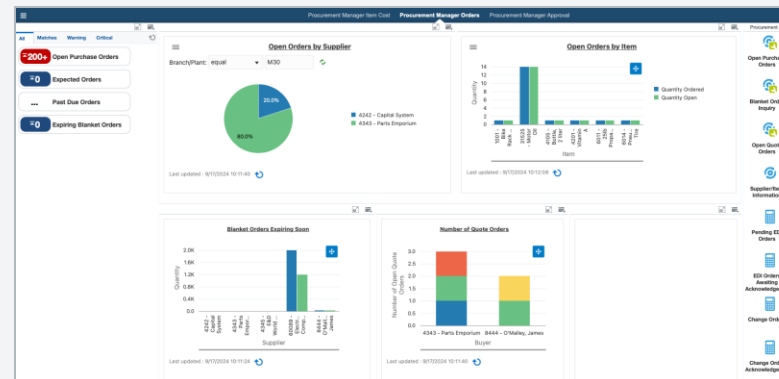
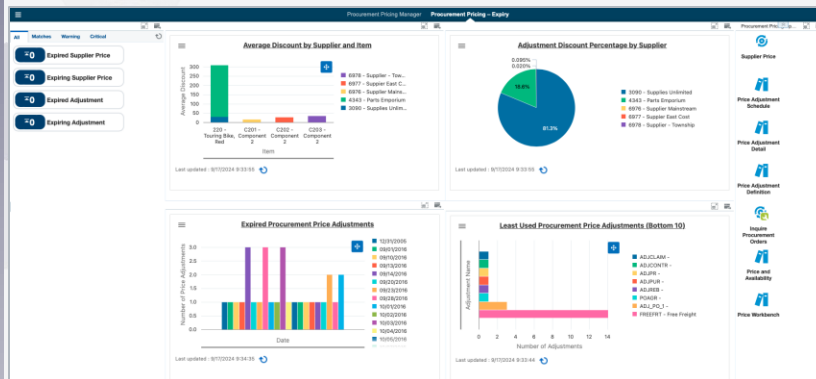
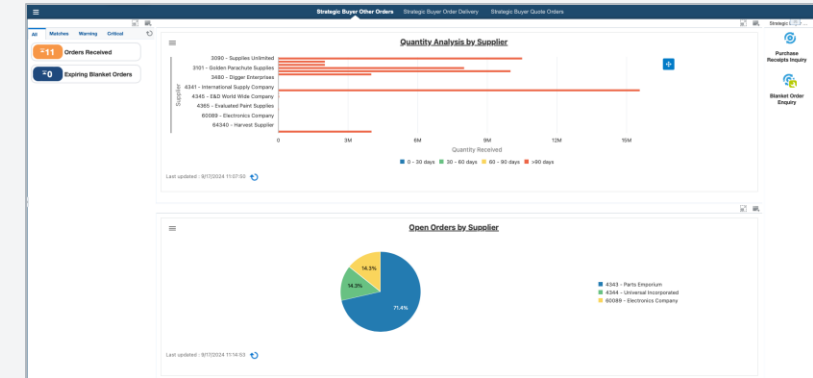
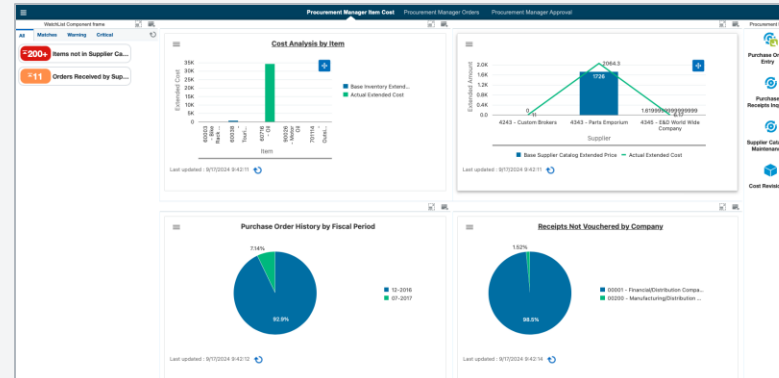
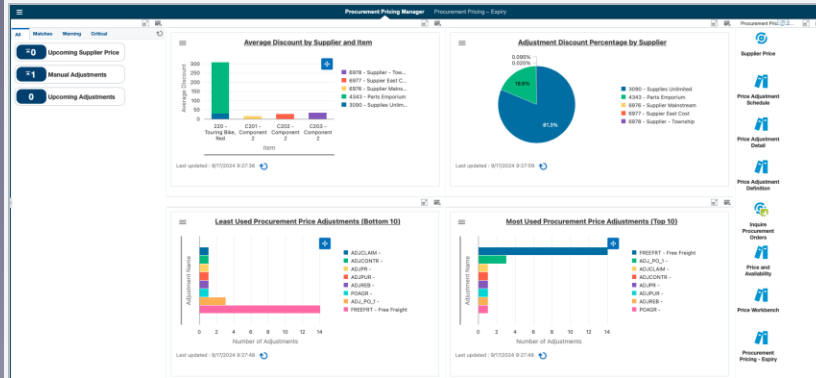


## ► Custom Version



# What's Available before Release 24?

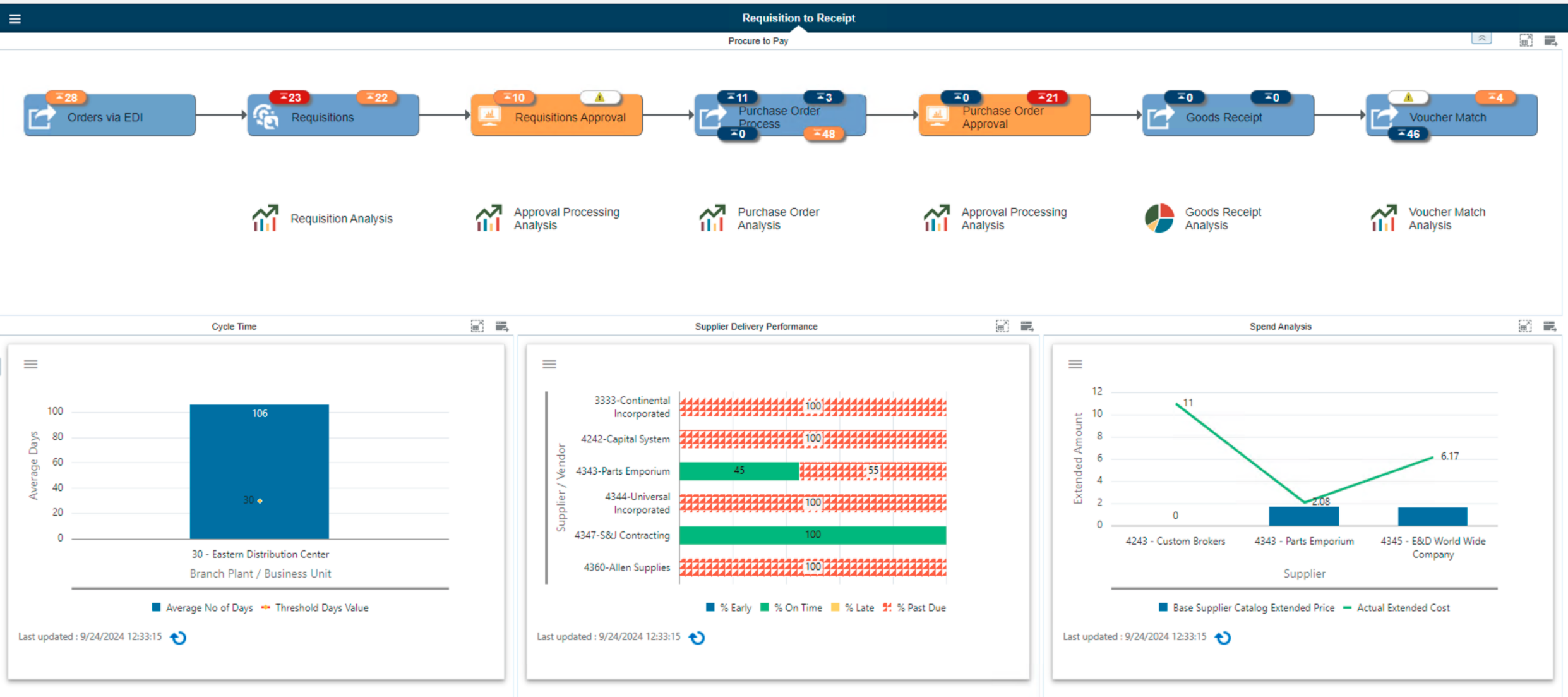
- UXOne for Purchasing: (3) Pre-configured Roles, (8) Composed Pages
  - PRPRIMRJDE – Procurement Pricing Operations Manager
  - PROCMGRJDE – Procurement Manager
  - BUYERJDE – Strategic Buyer



# Release 24 New Features

- These new features are intended to help customers to improve their enterprise-wide operations through integrated automation and data visualization.
- Key capabilities include:
  - ✓ EnterpriseOne Page of the Procure to Pay process flow of the specific process steps like requisitioning, approving, ordering, receiving, and paying for goods to vendors.
  - ✓ Watchlists for quick insight to procurement supervisor or manager on critical and important metrics related to the process step associated to the tile.
  - ✓ New charts and graphs that represents KPI metrics related to the health of the procure to pay process flow. KPIs available are:
    - Cycle Time
    - Supplier Delivery Performance
    - Spending Analysis
  - ✓ Links to existing UX One pages that provide insight regarding backorders, late, and held orders.
  - ✓ Links to new charts and graphs.

# Procure To Pay

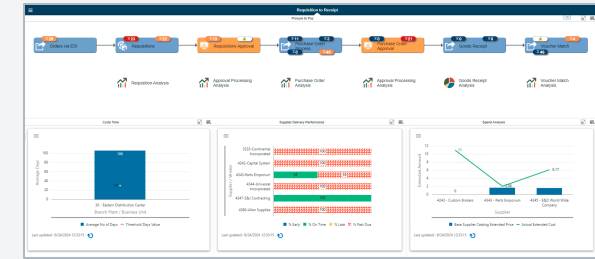


# Procure To Pay

## ➤ P43041X – New Analytic Page

### ➤ To access:

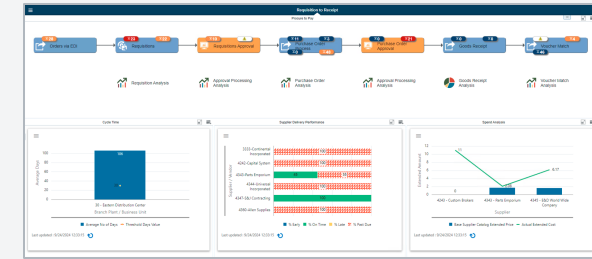
- Navigate to EnterpriseOne Menus → Supply Management → Procurement Management → Enterprise Automation (G43EA) → Procurement Process
- Select My Content under the Personalization category, and then My Pages. Select the **EA\_Procurement Process** check box and click Save.



# Procure To Pay

## ► Workflow (a typical end-to-end process flow for the Procure To Pay)

- Orders via EDI (P4311Z1)
- Requisitions (P4310)
- Requisitions Approval (P43081)
- Purchase Order Process (P43060)
- Approving Purchase Orders (P43081)
- Goods Receipt (P4312)
- Voucher Match (P4314)



## ► Watchlists

- There are watchlists on the tile that gives a quick insight to procurement supervisor or manager on critical and important metrics related to the process step associated to the specific business process.
- For example, from the P4310 (Requisitions)
  - Requisitions Awaiting PO Conversion
  - Requisitions on Hold

## ► Links to UXOne Analytics

- The composed page includes useful links to other UXOne components.
  - Requisition Analysis (P43261X)
  - Approval Processing Analysis (P43081X)
  - Purchase Order Analysis (P43261X)
  - Good Receipts Analysis (P43260X))
  - Voucher Match Analysis (P042022X)

# Procure To Pay

## ► Workflow and Watchlists complete list

Tile	Associated Watchlist Title	Watchlist Description
<b>Orders via EDI</b>	Pending Inbound Orders Past 1 Year	Requisitions come in from other systems and are unprocessed for one year.
<b>Requisitions (P4310)</b>	Requisitions Awaiting PO Conversion	Number of requisitions yet to be converted to purchase order.
	Requisitions on Hold	Number of Requisitions on hold.
<b>Requisitions Approval (P43081)</b>	Requisition Awaiting Approval	Number of requisitions yet to be approved.
	Requisition On Budget Hold	Number of requisitions on budget hold.
<b>Purchase Order Process (P43060)</b>	Orders with value greater than 10K	Orders with a value greater than ten thousand.
	Open Transfer Orders	Open Transfer Orders (OT).
	Open Purchase Orders	Open Purchase Orders (OP/S).
	Open Non-Stock and Service Orders	Open Non-Stock and Service Orders (OP/N, OP/J).
<b>Purchase Order Approval (P43081)</b>	Orders Awaiting Approval	Purchase order pending approval.
	PO Rejected in Past 30 Days	Number of purchase orders rejected in last 30 days.
<b>Good Receipt (P4312)</b>	Purchase Orders Expected in 60 Days	Purchase orders having promised delivery dates in the next 60 days.
	Transfer Order in next 60 Days	Transfer purchase orders expected in 60 days of promised delivery date.
<b>Voucher Match (P4314)</b>	Voucher Batches Out of Balance	Number of V batch type out of balance.
	Pending Voucher Batches	Number of V batch type unposted.
	Open Receipt Lines for Voucher Match	Orders received but not vouchered for payment yet.



# Procure To Pay

## ► KPIs

## ► Cycle Time

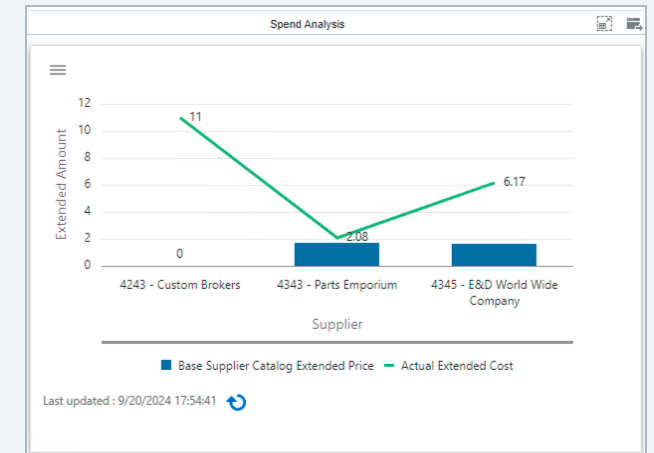
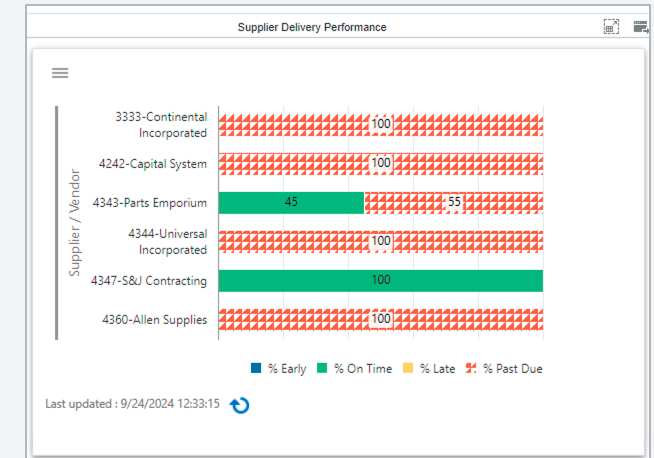
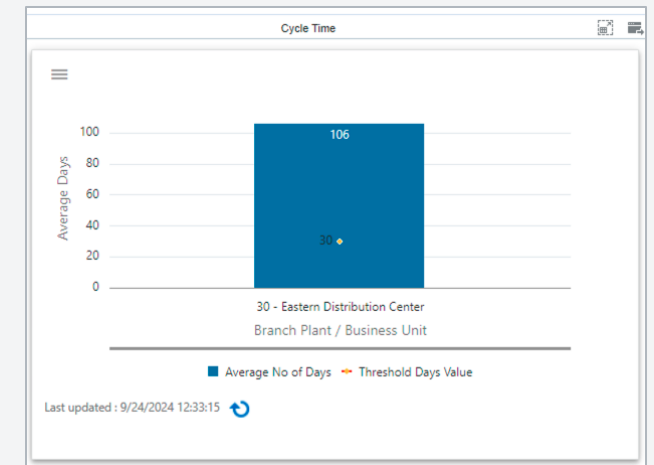
- KPI that provides Average Number of Days vs. Threshold Days Value in a bar and line graph format.
- This graph represents the cycle time of the purchase order line from the requested date to the time it is closed.
- Data from P43041 – Purchase Order Ledger (F43199)

## ► Supplier Delivery Performance

- Promised Date vs Actual Delivery of an order line in terms of various timeline parameters in a horizontal bar graph format.
- This graph depicts the delivery status of an order from a supplier in terms of the percentage delivered before the due date, on the due date, after the due date, and not delivered even past the due date.
- Data from P43268 – Purchase Order Inquiry (F4311)

## ► Spend Analysis

- This chart provides Supplier Catalog Extended Price vs. Actual Extended Cost by Supplier in a line and bar graph format.
- Data from P43266 – One View Supplier Cost Analysis (F4311/F4101)



# Components & Configuration Needed

# Components & Configuration Needed

- Tools Release 9.2.7.4 or later
- Order To Cash
  - BUG 36219805 – UDO\_9.2\_10638
  - BUG 36293720 – JN20899 / Translations
- Procure To Pay
  - BUG 35667203 – UDO\_9.2\_10608
  - BUG 36363346 – JN20837

# Steps to Implement Out-of-the-box Content

# Steps to Implement Out-of-the-box Content

## ➡ Order To Cash

➡ Once installed, open P98220U and look for OMW Project: UDO\_9.2\_10634

- Approve / Share all Components
- Add Security to all Components (by User or "Test" Role)

## ➡ Components

- ✓ (1) Composite
- ✓ (5) E1Pages
- ✓ (17) Queries
- ✓ (10) Watchlist
- ✓ (3) Images

Note: this is in addition to other UDOs delivered as part of UXOne. You will need to review security for those UDO as well.

Short Description	User Defined Object Name	User Defined Object Type	Object Name	Form Name	Version	Version Description
EA_Order to Cash	CMP_2403010004JDE	COMPOSITE				
On-Time Shipping Percentage	E1P_2402140002JDE	E1PAGE				
Rate of Return	E1P_2402220001JDE	E1PAGE				
Supplier Delivery Performance	E1P_2402260001JDE	E1PAGE				
Cycle Time Analysis	E1P_2402260002JDE	E1PAGE				
Order Fill Rate	E1P_2404290001JDE	E1PAGE				
ux-icon	IMG_2403110001JDE	IMAGE				
BarChart	IMG_2403120001JDE	IMAGE				
PieChart	IMG_2403120002JDE	IMAGE				
Total Number of Orders to Fulfill	OVW42101C_2401030001JDE	WATCHLIST	P42101	W42101C	ZJDE0001	Sales Order Entry - SO Order Type
Prioritized Orders	OVW42101C_2401030003JDE	WATCHLIST	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Total Orders to Run Pick Slip	OVW42101C_2401030005JDE	WATCHLIST	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Late Orders to Run Pick Slip	OVW42101C_2401030006JDE	WATCHLIST	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Total Orders to be Confirmed	OVW42101C_2401030007JDE	WATCHLIST	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Late Orders to be Confirmed	OVW42101C_2401030008JDE	WATCHLIST	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Late Orders Ready to Invoice	OVW42101C_2401030009JDE	WATCHLIST	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Pick Slip Prioritized Orders	OVW42101C_2402150001JDE	WATCHLIST	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Ship Conf Prioritized Orders	OVW42101C_2402150004JDE	WATCHLIST	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Orders on Hold	OVW4211A_2401240001JDE	WATCHLIST	P4211	W4211A	ZJDE0001	Inquire Held Orders - Default Version
E1 Order Fill Rate	QRY42025A_2405060001JDE	QUERY	P42025	W42025A	ZJDE0001	Sales Ledger Inquiry
Orders to Fulfill	QRY42101C_2401020001JDE	QUERY	P42101	W42101C	ZJDE0001	Sales Order Entry - SO Order Type
Prioritized Orders	QRY42101C_2401020002JDE	QUERY	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Late Orders Ready to Invoice	QRY42101C_2401020003JDE	QUERY	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Late Orders to be Confirmed	QRY42101C_2401020004JDE	QUERY	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Late Orders to Run Pick Slip	QRY42101C_2401020005JDE	QUERY	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Total Orders to be Confirmed	QRY42101C_2401020006JDE	QUERY	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Total Orders to Run Pick Slip	QRY42101C_2401020007JDE	QUERY	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Pick Slip Prioritized Orders	QRY42101C_2402150001JDE	QUERY	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
Ship Conf Prioritized Orders	QRY42101C_2402150002JDE	QUERY	P42101	W42101C	ZJDE0015	UX One - Sales Order Entry Review Late Orders
E1_Rate of Return	QRY42101C_2402270002JDE	QUERY	P42101	W42101C	ZJDE0020	
E1_On Time Ship Percentage	QRY42101C_2402270003JDE	QUERY	P42101	W42101C	ZJDE0020	
Late Promised Ship Date	QRY4210E_2401240005JDE	QUERY	P4210	W4210E	ZJDE0001	Sales Order Entry - SO Order Type
E1_Purchase Order Cycle Time	QRY43041A_2402260001JDE	QUERY	P43041	W43041A	ZJDE0001	Order Ledger - Inventory Purchases
E1_Requisition Cycle Time	QRY43041A_2402260002JDE	QUERY	P43041	W43041A	ZJDE0001	Order Ledger - Inventory Purchases
E1_Transfer Order Cycle Time	QRY43041A_2402260003JDE	QUERY	P43041	W43041A	ZJDE0001	Order Ledger - Inventory Purchases
E1_Supplier Delivery Analysis	QRY43268A_2402260004JDE	QUERY	P43268	W43268A	ZJDE0001	Work With Order Inquiry - Default Version

# Steps to Implement Out-of-the-box Content

## ➤ Order To Cash

- Use [View Dependencies] option from the P98220U to get all the components used on the Composed Page.

**View Dependency**

✓ 🔍 + 🗑️ ✕ 📄 Form ⚙️ Tools ↺ One View

Web Object User: \*PUBLIC

Calling Object: CMP\_2403010004JDE EA\_Order to Cash

Called Object: \*

Records 1 - 37

	Calling Object	Calling Description	Calling Type	Called Object	Called Description	Called Type	Web Object User
<input checked="" type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	E1P_2402140002JDE	On-Time Shipping Percentage	E1PAGE	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	E1P_2402220001JDE	Rate of Return	E1PAGE	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	E1P_2404290001JDE	Order Fill Rate	E1PAGE	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	IMG_2403110001JDE	ux-icon	IMAGE	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42040A_160915000...	Ready to Invoice	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42040A_1609150008JDE	Ready to Invoice	WATCHLIST	QRY42040A_160915002...	Ready to Invoice Watchlist	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42040A_160915001...	Released Backorders	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42040A_1609150011JDE	Released Backorders	WATCHLIST	QRY42040A_160915002...	Released Backorder Watchlist	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_160915001...	Late Orders	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_1609150012JDE	Late Orders	WATCHLIST	QRY42101C_160915002...	Late Orders Watchlist	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240103000...	Total Number of Orders to Fulfill	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_2401030001JDE	Total Number of Orders to Fulfill	WATCHLIST	QRY42101C_240102000...	Orders to Fulfill	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240103000...	Prioritized Orders	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_2401030003JDE	Prioritized Orders	WATCHLIST	QRY42101C_240102000...	Prioritized Orders	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240103000...	Total Orders to Run Pick Slip	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_2401030005JDE	Total Orders to Run Pick Slip	WATCHLIST	QRY42101C_240102000...	Total Orders to Run Pick Slip	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240103000...	Late Orders to Run Pick Slip	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_2401030006JDE	Late Orders to Run Pick Slip	WATCHLIST	QRY42101C_240102000...	Late Orders to Run Pick Slip	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240103000...	Total Orders to be Confirmed	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_2401030007JDE	Total Orders to be Confirmed	WATCHLIST	QRY42101C_240102000...	Total Orders to be Confirmed	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240103000...	Late Orders to be Confirmed	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_2401030008JDE	Late Orders to be Confirmed	WATCHLIST	QRY42101C_240102000...	Late Orders to be Confirmed	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240103000...	Late Orders Ready to Invoice	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_2401030009JDE	Late Orders Ready to Invoice	WATCHLIST	QRY42101C_240102000...	Late Orders Ready to Invoice	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240215000...	Pick Slip Prioritized Orders	WATCHLIST	*PUBLIC
<input type="checkbox"/>	OVW42101C_2402150001JDE	Pick Slip Prioritized Orders	WATCHLIST	QRY42101C_240215000...	Pick Slip Prioritized Orders	QUERY	*PUBLIC
<input type="checkbox"/>	CMP_2403010004JDE	EA_Order to Cash	COMPOSITE	OVW42101C_240215000...	Ship Conf Prioritized Orders	WATCHLIST	*PUBLIC



# Steps to Implement Out-of-the-box Content

## ➡ Procure To Pay (aka Requisitions to Receipt)

### ➡ Once installed, open P98220U and look for OMW Project: 35667203

- Approve / Share all Components
- Add Security to all Components (by User or "Test" Role)

### ➡ Components

- ✓ (7) Composite
- ✓ (2) Form Extensions
- ✓ (27) Queries
- ✓ (27) Watchlist

Note: this is in addition to other UDOs delivered as part of UXOne. You will need to review security for those UDO as well.

Short Description	User Defined Object Name	User Defined Object Type	Object Name	Form Name	Version	Version Description
EA_Procurement Process	CMP_2307040003JDE	COMPOSITE				
Purchase Approvals	CMP_2307050002JDE	COMPOSITE				
Voucher Match	CMP_2307250001JDE	COMPOSITE				
Voucher Match Automation	CMP_2307250002JDE	COMPOSITE				
Goods Receipt	CMP_2307310003JDE	COMPOSITE				
Orders via EDI	CMP_2308070002JDE	COMPOSITE				
Purchase Order Process	CMP_2308070005JDE	COMPOSITE				
P43041_W43041A	FXT43041A_2307200001JDE	FORMEXTNS	P43041	W43041A		
P43214_W43214A	FXT43214A_2308080001JDE	FORMEXTNS	P43214	W43214A		
Unposted Voucher Batches	OVW0011A_2308140007JDE	WATCHLIST	P0011	W0011A	ZJDE0002	Batch Options for Voucher Journal Review
Voucher Batches Out of Balance	OVW007032A_2308070001JDE	WATCHLIST	P007032	W007032A	ZJDE0004	UX One - Voucher Batches Out of Balance
Vouchers On Payment Hold	OVW0411G_2308040002JDE	WATCHLIST	P0411	W0411G	ZJDE0007	Voucher Entry with Match
Open Logged Vouchers	OVW042002A_2308080001JDE	WATCHLIST	P042002	W042002A	ZJDE0001	A/P Voucher JE Redistribution
Req Rejected in Past 30 Days	OVW4209A_2307130003JDE	WATCHLIST	P4209	W4209A	ZJDE0001	Inquire Requisitions Awaiting Approval
PO Rejected in Past 30 Days	OVW4209A_2308070002JDE	WATCHLIST	P4209	W4209A	ZJDE0001	Inquire Requisitions Awaiting Approval
Requisitions on Budget Hold	OVW4209A_2308070003JDE	WATCHLIST	P4209	W4209A	ZJDE0001	Inquire Requisitions Awaiting Approval
Requisitions Pending Approval	OVW4209A_2308070004JDE	WATCHLIST	P4209	W4209A	ZJDE0001	Inquire Requisitions Awaiting Approval
Orders Awaiting Approvals	OVW43081A_1607260008JDE	WATCHLIST	P43081	W43081A	ZJDE0002	Purchase Orders Awaiting Approval
Open Non Stock and Service Orders	OVW4310G_2308070005JDE	WATCHLIST	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Requisitions Awaiting PO Conversion	OVW4310G_2308080002JDE	WATCHLIST	P4310	W4310G	ZJDE0003	Order Entry - Requisition
Open Purchase Orders	OVW4310G_2308080003JDE	WATCHLIST	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Orders Ready For Receipts	OVW4310G_2308080006JDE	WATCHLIST	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Pending-Send to Supplier	OVW4310G_2308140004JDE	WATCHLIST	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Open Purchase Orders-Past Due	OVW4310G_2308140005JDE	WATCHLIST	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Requisitions On Hold	OVW4310I_2307130002JDE	WATCHLIST	P4310	W4310I	ZJDE0003	Order Entry - Requisition
Orders with Value More Than 10K	OVW4310I_2307250012JDE	WATCHLIST	P4310	W4310I	ZJDE0001	Order Entry - Inventory
Pending Inbound Ord Past 1 Yr	OVW431121A_2307180006JDE	WATCHLIST	P431121	W431121A	ZJDE0001	Inbound Purchase Orders
Open Receipt Lines for Voucher Match	OVW43214A_2308040001JDE	WATCHLIST	P43214	W43214A	ZJDE0001	Receipts Inquiry With Reversing Capabilities
Purchase Orders In-Transit	OVW43250K_2307170002JDE	WATCHLIST	P43250	W43250K	ZJDE0001	Movement and Disposition
Purchase Orders at Dock	OVW43250K_2307170003JDE	WATCHLIST	P43250	W43250K	ZJDE0001	Movement and Disposition
Purchase Orders On Inspection	OVW43250K_2307170004JDE	WATCHLIST	P43250	W43250K	ZJDE0001	Movement and Disposition
Orders Expected in 60 Days	OVW43265A_2307180001JDE	WATCHLIST	P43265	W43265A	ZJDE0001	One View Simple Procurement Inquiry
Transfer Orders in Next 60 Days	OVW43265A_2307180002JDE	WATCHLIST	P43265	W43265A	ZJDE0001	One View Simple Procurement Inquiry
Open Direct Ship Orders	OVW43265A_2307180003JDE	WATCHLIST	P43265	W43265A	ZJDE0001	One View Simple Procurement Inquiry
Open Transfer Orders	OVW43265A_2307180004JDE	WATCHLIST	P43265	W43265A	ZJDE0001	One View Simple Procurement Inquiry
Order Lines in Receipt Routing	OVW43265A_2308180001JDE	WATCHLIST	P43265	W43265A	ZJDE0001	One View Simple Procurement Inquiry
Un-Posted Voucher Batches	QRV0011A_2308140006JDE	QUERY	P0011	W0011A	ZJDE0002	Batch Options for Voucher Journal Review
Voucher Batches Out of Balance	QRV007032A_2308070001JDE	QUERY	P007032	W007032A	ZJDE0004	UX One - Voucher Batches Out of Balance
Pay Status On Hold Vouchers	QRV0411G_2308040002JDE	QUERY	P0411	W0411G	ZJDE0007	Voucher Entry with Match
Open Logged Vouchers	QRV042002A_2308080001JDE	QUERY	P042002	W042002A	ZJDE0001	A/P Voucher JE Redistribution
Req Pending Approval	QRV4209A_2307120003JDE	QUERY	P4209	W4209A	ZJDE0001	Inquire Requisitions Awaiting Approval
Req on Budget Hold	QRV4209A_2307120005JDE	QUERY	P4209	W4209A	ZJDE0001	Inquire Requisitions Awaiting Approval
Req Rejected in Past 30 Days	QRV4209A_2307130003JDE	QUERY	P4209	W4209A	ZJDE0001	Inquire Requisitions Awaiting Approval
PO Rejected in Past 30 Days	QRV4209A_2308070002JDE	QUERY	P4209	W4209A	ZJDE0001	Inquire Requisitions Awaiting Approval
Order Awaiting Approval	QRV43081A_1607260025JDE	QUERY	P43081	W43081A	ZJDE0002	Purchase Orders Awaiting Approval
Past Due Purchase Orders	QRV4310G_2307140001JDE	QUERY	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Approved Requisitions	QRV4310G_2307170001JDE	QUERY	P4310	W4310G	ZJDE0003	Order Entry - Requisition
Open Non-Stk Service Orders	QRV4310G_2308070003JDE	QUERY	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Open Purchase Orders 1 Year	QRV4310G_2308080002JDE	QUERY	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Orders To Be Received	QRV4310G_2308080004JDE	QUERY	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Pending-Send to Supplier	QRV4310G_2308140005JDE	QUERY	P4310	W4310G	ZJDE0001	Order Entry - Inventory
Held Requisitions	QRV4310I_2307130002JDE	QUERY	P4310	W4310I	ZJDE0003	Order Entry - Requisition
Order Value More Than 10K	QRV4310I_2307250003JDE	QUERY	P4310	W4310I	ZJDE0001	Order Entry - Inventory



# Steps to Customize Out-of-the-box Content

# Customizing the out-of-the-box Content

## ➤ Workflow

- Use Composed Pages designer to change workflow to match “your business process”
- Perhaps a custom application for Pick Slips, maybe you need to print a BOL, or maybe you need to send EDI documents. Make the necessary changes to the workflow to meet your business requirements.
- Follow your UDO Management to Approve and Share

## ➤ Watchlists

- Each tile on the workflow allows up to four (4) watchlist
- Create new Watchlists that matches your business requirements
- Some of the watchlists delivered with the solution are based on defaults (i.e. Order Statues) or demo data, so they may not work out-of-the-box
- Follow your UDO Management to Approve and Share

## ➤ Links to other pages (UXOne Content or other)

- Review the UXOne content delivered, perhaps there is something you can use
- This content is based on the same premises: ingest, model, analyze, solve and measure

## ➤ KPIs

- These KPIs use preconfigured queries, so you will need to create new Queries that match your business process
- Follow your UDO Management to Approve and Share

# Continuous Delivery

● Planned

Ingest	Model	Analyze	Solve	Measure
<b>Existing</b> <ul style="list-style-type: none"> <li>Transaction tables</li> <li>Ledgers</li> <li>Audit tables</li> <li>Workflow Tables</li> </ul>	<ul style="list-style-type: none"> <li>EnterpriseOne Pages</li> <li>Orchestrator Studio</li> <li>Workflow Studio</li> <li>Activity Rules</li> </ul>	<ul style="list-style-type: none"> <li>One View Reporting</li> <li>UX One Pages</li> <li>Watchlists</li> <li>Workflow Process Task Monitor</li> <li>Orchestrator Monitor</li> <li>REST API Monitor</li> </ul>	<ul style="list-style-type: none"> <li>Orchestrator &amp; Workflow</li> <li>Extensibility Framework, User-defined Objects</li> <li>Web Object Management</li> </ul>	<ul style="list-style-type: none"> <li>One View Reporting</li> <li>UX One Role-based Pages</li> <li>JET Charts</li> </ul>
<b>Recent</b> <ul style="list-style-type: none"> <li>User-defined Orchestration Monitoring</li> <li>Task Tracking</li> </ul>	<ul style="list-style-type: none"> <li>✓ EA: Procure to Pay</li> <li>EA: Ship to Dispatch</li> <li>✓ EA: Order to Cash</li> <li>Link between E1 Pages</li> </ul>	<ul style="list-style-type: none"> <li>Workflow Monitor</li> <li>Watchlist Badges on E1 Page Tiles</li> <li>Ascending/Descending Thresholds on WLs</li> <li>Workflow Process View</li> </ul>	<ul style="list-style-type: none"> <li>Notification Reminders</li> <li>Prebuilt Workflow Structures</li> <li>Promote to Package</li> <li>Stateful Orchestrations</li> </ul>	<ul style="list-style-type: none"> <li>✓ Procure to Pay KPIs</li> <li>Order to Receipt KPIs</li> </ul>
<b>Roadmap</b> <ul style="list-style-type: none"> <li>Add Data Items to a Form</li> <li>Analytic tables</li> </ul>	<ul style="list-style-type: none"> <li>EA: Additional Models</li> <li>Enterprise Process Modeler/Model Generator</li> <li>Text/Images on Pages</li> <li>EA: Procure to Pay with WMS</li> <li>EA: Order to Cash with WMS</li> <li>EA: Production Order to Cost Update</li> </ul>	<ul style="list-style-type: none"> <li>Watchlists on Connectors</li> <li>Notifications on Pages</li> <li>EnterpriseOne Widgets</li> <li>Comparative Criteria on Queries</li> </ul>	<ul style="list-style-type: none"> <li>My Tasks</li> <li>Rich Formatting of Workflow Messages</li> <li>Conditional Launch of Orchestrations</li> </ul>	<ul style="list-style-type: none"> <li>Enterprise Automation Workbench</li> <li>Workflow Status on Forms</li> <li>A: Procure to Pay with WMS KPIs</li> <li>EA: Order to Cash with WMS KPIs</li> <li>EA: Production Order to Cost Update KPIs</li> </ul>

# Documentation

- ➡ One View Reporting Applications in Distribution (Doc ID 1496298.1)
  - List of new applications for Distribution for reporting purposes
- ➡ UX One E1 Page/Object Cross Reference for All Delivered Roles (Doc ID 2227250.1)
  - UX One Cross Reference contains information on the objects needed for each E1 Page within a UX One Role delivered through.
  - UDO Uplift Q1–Q4 2023 Excel containing information on the UDO objects uplifted for Tools Release 9.2.7.0 and later as of Nov '23.
- ➡ How to setup UX One (Doc ID 2208545.1)

# Documentation

## ► Tools Release Compatibility

JDEdwards	OneWorld	EnterpriseOne							Release Date
Application Release	XE/ERP8	8.10	8.11	8.11 SP1	8.12	9.0	9.1	9.2	
Compatible Tools Release	SP23/24	X	X	X	X	X	X	X	
		8.93	X	X	X	X	X	X	
		8.94	8.94	X	X	X	X	X	
		8.95	8.95	8.95	X	X	X	X	
		8.9	8.96	8.96	8.96	X	X	X	
		8.97	8.97	8.97	8.97	X	X	X	
		8.98	8.98	8.98	8.98	8.98	X	X	
		8.98.1	8.98.1	8.98.1	8.98.1	8.98.1	X	X	
		X	8.98.2	8.98.2	8.98.2	8.98.2	X	X	
		X	8.98.3	8.98.3	8.98.3	8.98.3	X	X	
		X	x	8.98.4 (8.98.4.11 or earlier)	8.98.4 (8.98.4.11 or earlier)	8.98.4 (8.98.4.14 Terminal Release)	8.98.4 (8.98.4.14 Terminal Release)	X	
		X	X	X	X	9.1.0.0	9.1.0.0	X	
		X	X	X	X	9.1.2.0	9.1.2.0	X	
		X	X	X	X	9.1.3.0	9.1.3.0	X	
		X	X	X	X	9.1.4.0	9.1.4.0	X	
		X	X	X	X	9.1.5.0	9.1.5.0	X	
		X	X	X	X	9.2.0.x	9.2.0.x	9.2.0.x	10/06/2015
		X	X	X	X	9.2.1.x	9.2.1.x	9.2.1.x	11/14/2016
		X	X	X	X	9.2.2.x	9.2.2.x	9.2.2.x	10/13/2017
		X	X	X	X	X	9.2.3.x	9.2.3.x*	11/08/2018
		X	X	X	X	X	9.2.4.x	9.2.4.x*	11/06/2019
		X	X	X	X	X	X	9.2.5.x*	11/04/2020
		X	X	X	X	X	X	9.2.6.x** (Release 22)	10/12/2021
		X	X	X	X	X	X	9.2.7.x** (Release 23)	10/20/2022
		X	X	X	X	X	X	9.2.8.0** (Release 24)	11/18/2023
		X	X	X	X	X	X	9.2.8.1**	12/18/2023
		X	X	X	X	X	X	9.2.8.2**	05/02/2024
		X	X	X	X	X	X	9.2.8.3**	06/20/2024

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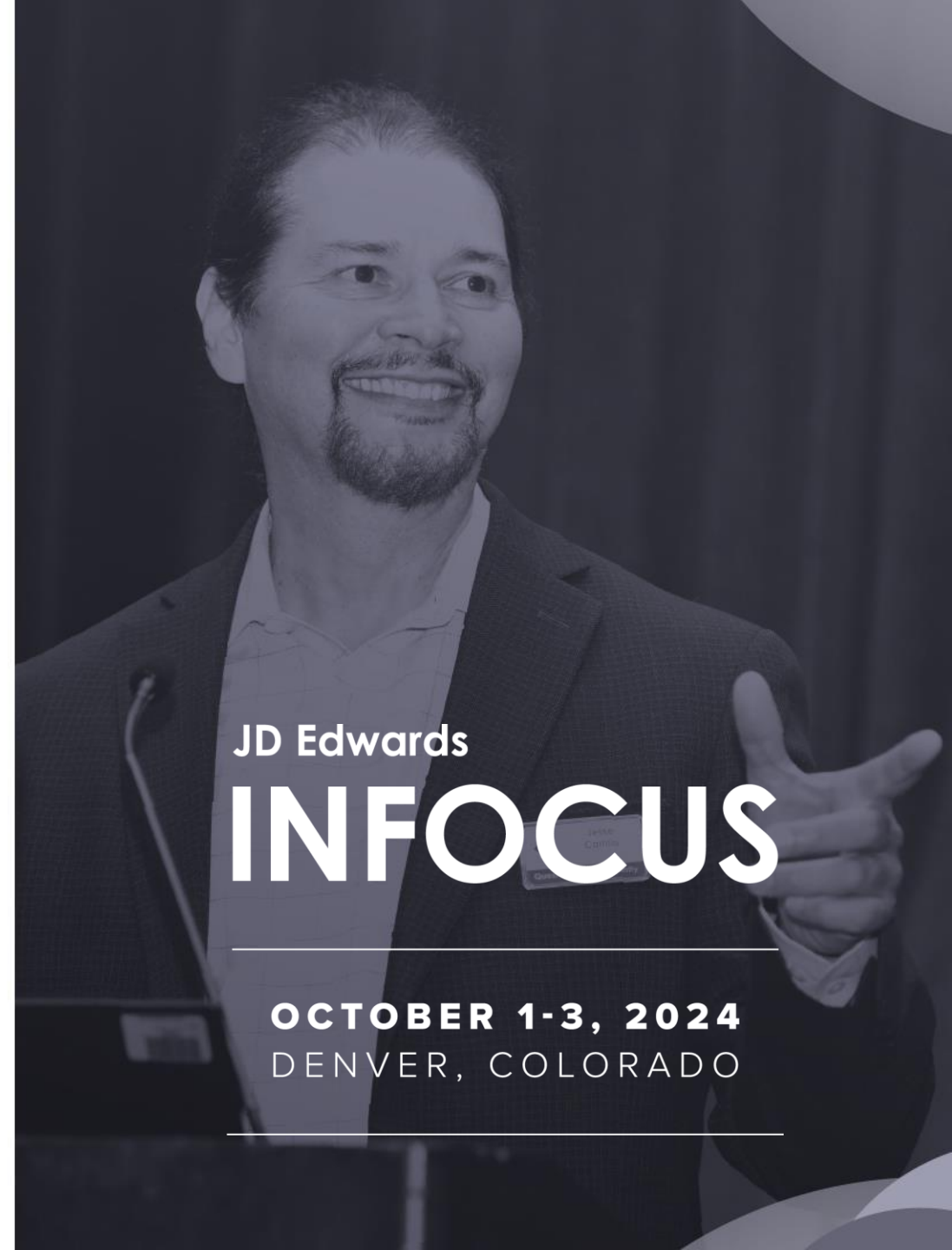




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