SYNTAX

Power your JDE
-- Approvals in MS Teams

A presentation for

SAP Gold Partner

ORACLE Service Partner
Expertise in
CSPE: Oracle Cloud Platform - Oracle E-Business Suite Applications to Oracle Cloud
in North America

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Microsoft

Agenda

JD Edwards EnterpriseOne Capital Asset Management Module + IIoT

- Fed Coop Introductions
- Fed Coop Business Case
- Syntax Introduction
- Solution Overview
- Q&A

SYNTAX

Presenter

Mike Smitten

Director, Innovation – Business Solutions

Federated Co-Operative Ltd.

- Over 20 years of Technology experience overseeing and implementing systems across several domains including, Supply Chain, Finance, HCM & Capital Asset Management
- Currently helping lead several strategic project and operational teams

Who we are

Federated Co-operatives Limited (FCL) is a wholesaling, manufacturing, administrative and marketing co-operative that serves independent local Co-ops across Western Canada.

OUR VISION

Building sustainable communities together.

Co-operative Retailing System (CRS)

CO-OP IN WESTERN CANADA

FCL and local Co-ops help build, feed, fuel and grow Western Canada.

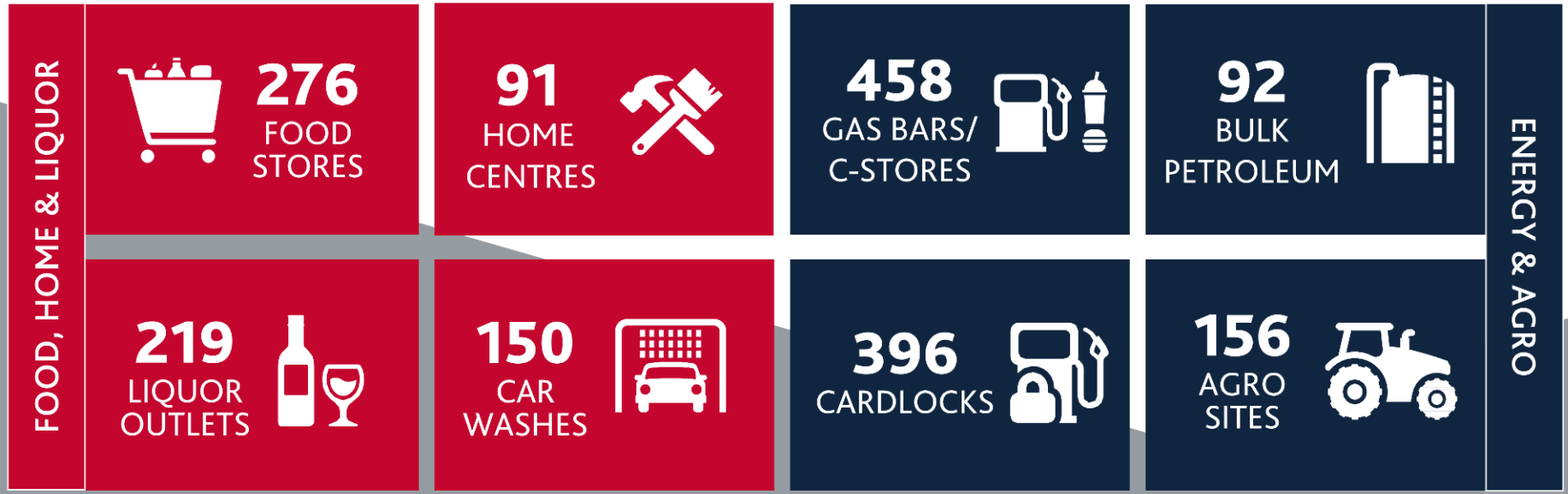
650+
COMMUNITIES

26,400+
EMPLOYEES

2.1 M+
MEMBERS

Co-op Locations

Co-op operates in four primary areas: agriculture, food, home and building solutions, and energy. Local Co-ops may also provide other services.



We Fuel Western Canada

- Distributes **17 million** litres of fuel products, per day
- **5.6 billion** litres of fuel sold, per year
- Fleet of **250 b-train units** travelled **49 million** kilometres

Co-op Ethanol Complex (CEC)

The CEC has been producing and shipping ethanol since 2008. FCL purchased the facility in the Summer of 2019.

- Based near Belle Plaine, Sask.
- Produces up to **150 million litres,** per year
- Generates between **$100 - $140 million** in economic impacts every year
- **350,000 tonnes** of grain and other crops purchased annually from ~ **270+** Western Canadian producers

Federated Co-operative Business Case

Purchase Order Approval

Fed Coop Business Case

Problem statement

Our organization currently uses JDE for Purchase Order and Requisition approval. Approval is routed via email. Based on current functionality, user has to login to JDE to approve their POs and Reqs.

Apart from JDE approvals, users approve various other documents that includes contracts, budgets, DocuSign etc.

Challenges

Seamless Process: JDE approvals happens in JDE. With approvers in mobility creates issue with timely approvals.
Centralized View: Need a centralized view of JDE and non JDE approvals in one view. Currently users get approvals in email, JDE, other 3rd party systems
Efficiency: Different logins, connectivity requirements like OKTA, VPN etc makes approval process tedious.
Compliance and Risk: Secured process and audit trail are essentials in having valid solution.

Fed Coop Business Case

Benefits

- Enhanced Efficiency by meeting approvers where they are
- Utilizing existing eco system (Microsoft Teams with JDE Orchestration)
- Minimal time needed for user adoption
- No new skillset or tools needed

Presenter

Mahesh Sathenjeri

Senior ERP Specialist
Syntax

- 23+ years of progressive IT experience including ERP systems, change control management, and SOX systems
- Extensive experience in process improvement around manufacturing, distribution and finance on initiatives like cost saving and performance improvements.
- Technical expertise includes Supply Chain, Operation Accounting, Distribution, Finance, HR, Compliance and Audit.

Syntax JDE PS Oracle Practice

30+
Years of JDE Services

300+
JDE customers

100+
9.2 Upgrades

30+
World to E1 Upgrades

60+
JDE Migration to Public and Private Cloud

22+
Years of Average JDE Experience

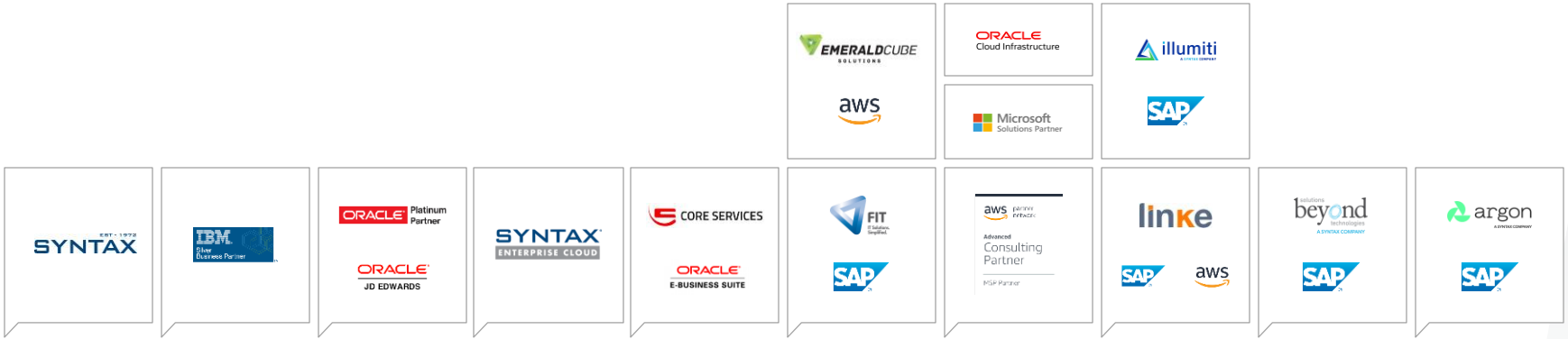
45+
Years of IBM i Services

#1
Most Oracle JDE on AWS

50 Years of Progress

ERP Software & Consulting

Cloud Services Evolution



1972 — ERP Experts

1983 — IBM Infrastructure Experts

1997 — JD Edwards Partnership

2007 — #1 Cloud Provider for JD Edwards

2017 — Core Services Acquisition

2019 — EMERALDCUBE Acquisition

FIT Acquisition

2020 — Oracle Cloud Infrastructure Partnership

Microsoft Solutions Partnership

AWS Partner Network Advanced Consulting Partner Managed Service Provider (MSP)

2021 — Illumiti Acquisition

Linke Acquisition

2023 — Beyond Acquisition

2024 — Argon Acquisition

Managed Services Evolution

Full-Service Provider

JD Edwards Solution Portfolio

- Upgrades
- Project Management
- Acquisition Divestiture
- System Reviews
- Assessments
- Health Checks
- Security Training

- Improvements
- IIOT
- Executive Platform
- DB Migrations
- Cloud Migrations
- Enhancements
- Implementations
- Redesign
- Performance Tuning

- CxHub
- EnterpriseCare

- SDLC
- ServiceNow

SYNTAX ENTERPRISE CLOUD · aws · Azure · ORACLE Cloud

- Cloud-Agnostic Options

- @Syntax, @Hyperscaler, @Customer

- Functional Services
- Application Development
- Middleware Development
- IoT, AI, and ML

- Business Intelligence & Analytics
- Enterprise Planning and Budgeting

- 24/7 Security Operations
- Endpoint Detection and Response
- Intrusion Protection

- Vulnerability Management
- Privileged Access Management
- SEIM as a Services

- Go Anywhere
- Q Software
- Hubble

- Help Systems
- ReportsNow
- Swift

- OBIEE Assessment/Tuning /Optimization
- Analytics Strategy Assessment

- Data Lake/Data Warehouse Planning
- ODI Upgrade and MS
- Hyperion Upgrades

Syntax Sample JD Edwards Customers

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Solution Overview

Capital Asset Management Module + IIoT

Solution Overview

Challenges

- Determination of Approval Flow

  Where should the approval flow reside? Should we change approval flow to overcome JDE limitations?

- Connectivity

  How should we connect Power Automate with JDE, type of license required, permissions, firewalls etc.

- Security

  JDE login credentials vs Active Directory, Oauth Authentication or Basic Authorization

Solution Overview

Challenges

- Scoping

  Escalations, Reminders, Auto Approvals, PO Attachments – Where do we draw the line?

- Roll Out Plan

  Should we do JDE approvals first or all type of approvals?

  Should we roll to all departments or certain departments?

Solution Overview

Syntax Offering

Advisory

- Microsoft Licensing
- Infrastructure Provisioning
- Security like SSO with Entra ID or OKTA

Implementation

- JDE Orchestration Design and Development
- Power Platform Design and Development
- 3rd party integrations (Service now, SAP, etc)

Solution Overview

Fed Coop Solution

- Determination of Approval Flow → Use JDE Approval Flow
- Connectivity → JDE Orchestration, Power Platform Premium License
- Security → Use Service Account for JDE → Power Automate.
  - Use SSO for Power Automate → JDE to approve or Reject
- Scoping → Limit to existing JDE PO approval process
- Rollout Plan → Implement to IT department as Phase 1 then roll out to other departments as Phase 2

Screenshots and/or Demo

Demo

Fed Coop Next Steps

Lessons Learned

- Challenges getting Power Platform whitelisted to connect to AIS server.
- Some non prod environments are not using SSO to connect JDE for approvals. Need to factor this is design.
- Approval Delegation was not factored in POC. Will be added to phase 2 roll-out.
- Remember to disable approval workflow in JDE.
- Build in support for updates to PO during active approval.

Fed Coop Next Steps

Next Steps

- Phase 1 - Go Live is scheduled for July 1, 2025
- Phase 2 - Roll out to shortlisted departments by Aug 31, 2025
- Add non JDE approval Flows in Teams by end of the year.

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Q&A

JD Edwards EnterpriseOne Capital Asset Management Module

Contact Us

Syntax provides end-to-end technical and functional solutions for JD Edwards that are prescriptive and help drive best practices, automation, and tooling to ensure peak performance, high availability, and security.

- Hosting and Managed Services
- Upgrades and Implementations
- Monitoring and Service Desk
- Performance Tuning and Optimization
- Cloud Migrations (private, public, hybrid)
- Security Managed Services

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Thank You
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