PeopleSoft®

EnterpriseOne JDE5 Solution Modeler PeopleBook

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Solution Modeler is intended to provide the ability to select from, manage, and create process models that are fully interactive with J.D. Edwards software applications. The Modeler uses built-in interoperability features to provide a seamless merging of the two technologies. Consequently, each Modeler task can be made to launch a J.D. Edwards software application or a Windows executable.

Included in the Solution Modeler are several hundred pre-configured process models. Each task that is linked to a J.D. Edwards software application appears in the End-User Task View in the Solution Explorer. Therefore, if you change the properties of one of these tasks in the Modeler, you change how the task functions in the Explorer. If you add a task to a process model and want it to appear in the End-User Task View, you must assign the task a relationship (that is, a location in the task view) and one or more roles. Only those users with corresponding roles can see your new task.

The purpose of this topic is to describe how to endow a Solution Modeler task with Solution Explorer task capabilities such as launching an application, prompting for values, and so forth. For information about creating and modifying models and model components, please refer to the Solution Modeler documentation.

Working with Business Processes

Business processes usually do not follow the same path each time they are performed. You can compare different paths through a process to examine alternatives by creating process scenarios. A scenario is all or a portion of a process model that defines a particular way in which the business executes the process.

J.D. Edwards provides several hundred pre-defined business processes and scenarios that represent suggested solutions for specific business process needs. You can select from these scenarios or modify them to define new ones.

To launch the Solution Modeler, select Solution Modeler from the Tools menu in any Solution Explorer task view.

Viewing OneWorld Business Processes

Use the following task to view the pre-defined business processes. For information about creating and maintaining your own business processes, please refer to the ProVision Workbench documentation.

► **To view OneWorld business processes**

1. Launch the Solution Modeler and ensure the OneWorld Business Process Models repository is open.

   Any repository that appears in boldface type in the Repository View window is open.

   To open a repository, expand the repository in the Repository View window, and then double-click one of the notebooks underneath the repository. You might need to provide a user ID and password, depending on how the repository has been configured.

2. Expand the Process Modeler object in the Model View window.
3. Double-click the OneWorld Business Process Models object.

   The OneWorld Business Process Model appears in the main window of the Modeler. This model is divided into the following categories:

   - Procure to Pay
   - Order to Cash
   - Consumption to Reorder
   - Concept to Opportunity
   - Demand to Available
   - Manage the Business
   - Manage Materials
4. Drill down to more discrete process models by clicking on the down arrow button on a task and choosing Workflow Modeler.

   The system opens a new view each time you drill down. Each view has its own tab at the bottom of the form, and you can alternate between views by clicking on their tabs. To close a view, click a tab, and then click the bottommost close button (the X) in the upper right corner of the form. Do not click the uppermost close button, or you will exit the Solution Modeler.

Working with Scenarios

Scenarios are variations of a business process model. In the base model, all of the tasks are considered to be active. In a scenario, you can disable or add extra tasks. Active (recruited) tasks appear in color in the scenario, while disabled (not recruited) tasks might appear in gray or might be hidden based on how the scenario is configured.

You use the Scenario toolbar to create, view, and modify scenarios. Click the Scenario button on the Object Tools toolbar to activate the Scenario toolbar. This activation applies only to the current business process. If you have multiple business process views available and you switch to a different view, you must activate the Scenario toolbar again to make it available in the view.

To select a scenario of the current business process, choose it from the drop-down list on the Scenarios toolbar. After you select a scenario, it is used as the default parent process in each sub-process you define for it.

Note

To properly link a scenario of a sub-process to its parent scenario, both the parent and child scenarios must have the same name. For example, you might have a base process, Enter Work Order, that includes a number of sub-processes, including one called Create Work Order Header. If you made a scenario of the parent called Enter Work Order v1, then drilled down into the Create Work Order Header sub-process and created a scenario of that sub-process, you would need to call that scenario Enter Work Order v1 as well.

To keep existing scenarios for comparison, J.D. Edwards recommends you create your own scenarios using existing scenarios as a base from which to start rather than modifying the existing scenarios. This process is known as cloning. After cloning a scenario, you can modify the clone without affecting the base scenario. You might want to modify a scenario; following are some of the most common reasons for modifying a scenario:

- To change the tasks or flow that are included in the scenario
- To change the names of the tasks that apply to a specific scenario
- To change the program version that is assigned to a task in a specific scenario

See Also

- ❑ *Working with Modeler Tasks*

► To clone a scenario

1. Open the scenario you want to clone.
2. Click Maintain on the Scenario toolbar.
3. On Scenario Maintenance, click the scenario you want to clone, and then click Clone.

   The system adds a new scenario with the same name as the one you are cloning, and places a asterisk (*) at the end of the name.

4. Ensure the new scenario is highlighted, and then click Modify.
5. On Scenario Detail, complete the following fields:
   - Amend the name to one meaningful for this implementation
   - Desc
6. Choose one of the following options:
   - Hide non-members

     Choose this option to keep not recruited tasks from being displayed in the scenario.

   - Ghost non-members

     Choose this option to display not recruited tasks in gray in the scenario.

7. Click OK.

► To change included tasks and flow

1. Open the scenario you want to change.
2. Use the standard Modeler tools to add tasks and change the flow among the tasks.
3. To change the recruitment status of a task, click Recruitment on the Scenario toolbar.

   The Scenario Recruitment dialog box appears.

4. Click on tasks to toggle their status between recruited and not recruited, and then click OK on Scenario Recruitment.

Working with Modeler Tasks

You can add Solution Explorer task functionality to any Solution Modeler task. Additionally, you can define and modify J.D. Edwards software scenarios for each Modeler task.

Associating Modeler and Solution Explorer Tasks

After creating a Modeler task, you then create a Solution Explorer task to associate with it. You create Solution Explorer tasks while you are in the Solution Modeler. Once the Solution Explorer task is associated with the Modeler task, you can interact with the Modeler task in many of the same ways you can with tasks in Solution Explorer task views. For example, you can prompt for values or versions, or execute the task's application (if it is a software task).

Accessing the Interoperability Menu

All task association in the Solution Modeler is performed through the interoperability menu. To perform any of the tasks in this section, you must first complete the following steps to display the interoperability menu.

► To access the interoperability menu

1. From Solution Explorer, select Solution Modeler from the Tools menu.

   Solution Modeler opens in a new window.

2. Open a process model or create a new one.
3. Right-click the Modeler task you want to work with, and then select OneWorld® Xe.

Assigning Properties to a Task

You can associate an Explorer task with a Modeler task. Then, you can launch the Explorer task from the Modeler task by right-clicking the task and then choosing Idea To Action from the interoperability menu.

► To assign properties to a task

1. Right-click the Modeler task that you want to assign properties to.
2. Select OneWorld® Xe, and then select Properties.

   The system confirms that you want to create a task.

3. Click Yes.
4. On Task Revisions, create an Explorer task to associate with the Modeler task.

   See Creating a Task for instructions on creating an Explorer task.

Note
Assigning roles and End-User task view relationships to a task are described in *Creating a Task.* Keep in mind that the system does not automatically assign roles or task view relationships, so you must assign them yourself as described in the referenced task.

5. Click OK.

Modifying Task Properties

After you have associated an Explorer task with a Modeler task, you can change the properties of the task from the Modeler.

► To modify task properties

1. Right-click a Modeler task with the associated Explorer task that you want to modify.
2. Select OneWorld Xe, and then select Properties.
3. On Task Revisions, change the properties that you want, and then click OK.

Launching an Associated Task

After you have associated an Explorer task with a Modeler task, you can launch the action defined by the associated task from the Modeler.

► To launch an associated task

1. Right-click a Modeler task with the associated Explorer task that you want to launch.
2. Select OneWorld Xe, and then select Idea To Action.

   The system launches the associated task.

Linking to an Explorer Task

Just as you can with Explorer tasks, you can create a link from a Modeler task to an Explorer task. For more information about linking tasks (including linking to task variants), see *Working with Task Links.*

► To link to an Explorer task

1. Right-click a Modeler task with the associated Explorer task that you want to add a link to.

   You can also create a link when you first create a new Explorer task.

2. Select OneWorld Xe, and then select Properties.
3. On Task Revisions, select Link To from the Form menu.

4. On the Link To form, click the Find Relationship button.
5. On the Find Relationship form, complete the following fields, and then click Find:

    - Task View

      Click the Visual Assist to bring up the Task View Search & Select form.

    - Parent Task ID

      Enter the parent of the task you want to set as the link target. Click the Visual Assist to bring up the Task Search & Select form.

   The Find Relationship form lists all of the child tasks of the parent you searched on.

6. Choose the task you want to set as the link target, and then click Select.

   The link target is the task that will appear in the second window when the user invokes the link. The system uses the information you provided to complete the required fields in the Link To form.

7. Click OK.
8. On Task Relationship Revisions, click OK.

Executing a Link

After you have created a link from a Modeler task to an Explorer task, you can execute the link.

► To execute a link

1. Right-click the Modeler task with the link that you want to execute.
2. Select OneWorld Xe, and then select Idea to Action.

   The system switches to the Solution Explorer and displays the linked task in a second window.

Setting Processing Options for a Task

After you have associated an Explorer task with a Modeler task, you can set its processing options, when applicable, from the Modeler.

► To set processing options for a task

1. Right-click the Modeler task with an associated Explorer task that you want to set processing options for.
2. Select OneWorld Xe, and then select Prompt for Values.
3. On Processing Options, set the processing options values as desired, and then click OK.

Selecting a Version of a Task to Execute

After you have associated an Explorer task with a Modeler task, you can choose which version of its associated application to execute.

► To select a version of a task to execute

1. Right-click the Modeler task with an associated Explorer task that you want to select a version to execute.
2. Select OneWorld Xe, and then select Prompt for Version.
3. On Work with Versions, select the version you want to execute, and then click Select.

Overriding a Task in a Scenario

In some instances, you might want to maintain a task's place in a scenario but alter some aspect of it such as its name or the version of the application it opens. For example, you might have two offices that use identical processes to enter a new employee, but they use different versions of a form in an application to enter insurance options. You could use the same process model for both offices and then create a scenario with a task override to launch a different form for the second office.

Use the following procedure to perform a task override in a scenario.

► To override a task in a scenario

1. Open a scenario.
2. Double-click the task you want to override.
3. On Task, click the OneWorld tab.
4. Click Override.
5. Perform one of the following:
    - Choose a task from Select Override Task.

      Override tasks are available only if the base business process model has multiple scenarios in which overrides already exist for the current task.
    - Enter a name in Create New Override Task, and then click Add.
6. Click OK.
7. Right-click the task, then choose OneWorld Xe, and then choose Properties.

   If you created a new task, the system confirms the creation.
8. On Task Revisions, create or modify an Explorer task to associate with the Modeler task.

   See *Creating a Task* for instructions on creating an Explorer task.

   Note
   Assigning roles and End-User task view relationships to a task are described in *Creating a Task.* Keep in mind that the system does not automatically assign roles or

task view relationships, so you must assign them yourself as described in the referenced task.

9. Click OK.

Managing Disk Space and Backups

While working in a repository, it is essential to back up your work. By default, Solution Modeler automatically saves a new backup each time the repository is closed. The Modeler keeps the five latest backups. This rolling backup methodology is useful for working repositories. Static repositories such as the OneWorld Business Process Model repository do not require multiple backups, however. Because each backup requires an equal amount of disk space, you should change the number of backups of static directories the system saves. Solution Modeler allows you to set the number of backups for each repository in the application.

Accessing Repository Details

You perform all disk space and backup management tasks from the Repository Details form. Use the following task to access the Repository Details form.

► **To access Repository Details**

1. In the Repository view window, right-click the repository, and then choose Open.

   After the repository is opened, it appears in bold letters.

2. Right-click the repository again, and then choose Detail.

Changing the Number of Rolling Backups

Use this procedure to change the number of rolling backups saved for a specific repository. You can also disable the automatic backup option.

► **To change the number of rolling backups**

1. On Repository Details, click the Options tab.

   See *Accessing Repository Details* for instructions about accessing the Repository Details form.

2. Enter the number of automatic backups you want to retain.

   You can enter any number of automatic backups. The default is 5. Remember that each backup takes the same amount of disk space, and unless you are managing a working repository, the file size of each subsequent backup will increase over time. This growth occurs because of the way the underlying database is set up. To manage the growth of backup files, you should periodically select "Compact database." If automatic back-ups are not required, remove the checkmark to "Automatically back up this repository whenever it is closed."

Managing Backups

In addition to the Modeler's automatic backup feature, you can create backups manually. After backups exist, you can restore data from them. You can rename backups to better manage them, and you can delete backups you no longer need.

Before You Begin

- See *Accessing Repository Details* for instructions about accessing the Repository Details form.

▶ To create a manual backup

1. On Repository Details, click the Backups tab, and then click the Back up button.
2. On the Create Backup window, enter a name for the backup file, and then click Backup.

   The system creates a backup of the open repository.

▶ To rename a backup

1. On Repository Details, click the Backups tab, and then choose a backup file.
2. Click Details.
3. On Backup Details, enter a new name for the backup, and then click OK.

▶ To restore a backup

1. On Repository Details, click the Backups tab, and then choose a backup file.
2. Click Restore.

   The system confirms that you want to overwrite your existing repository.

3. Click Yes to overwrite your repository with the backup.

▶ To delete a backup

1. On Repository Details, click the Backups tab, and then choose a backup file.
2. Click Delete.

   The system confirms that you want to delete the backup.

3. Click Yes to accept the deletion.