



May 2025

Implementing Change Control in JDE



We help our customers realize IT



Cloud Hosting

Public, private and hybrid cloud solutions



Managed Services

ERP system management with first-rate response times



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Integrating your business data with emerging technologies



JDE Consulting

Develop, implement, and support JDE applications



Clarity

Synthetic monitoring and alerting to help JDE system admins

ERP Suites Products

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JD EDWARDS



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Mobility

JDE data and task management to mobile devices

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Business Advisory Services

- Project Management
- Technical Strategic Roadmapping
- Enterprise Architecture Strategy
- Systems Gap Analysis
- Process Engineering
- Organizational Change Management
- Digital Transformation
- Analytics & Insights Strategy



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- Managed Services
- UXOne Expertise
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Trusted Advisors

For JDE Users

unlocking
efficiency



boosting
profitability



ORACLE

Partner



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We build relationships to deliver the best solution for your situation



Over 300 companies have trusted us to help them grow



SAGENT®



ALLOut Security software

The ALLOut mission
is to help YOU
**Simplify, Enhance &
Report** on JDE
Security & Controls.



Market Leading
Software



Best Practice
Education



Global Partner
Network



Why is ALLOut the better choice?



+20 Years of JDE Security Expertise with a Roadmap of Continuous Innovation for a Future-Proof Solution



Enhanced Access Reporting & Audit Monitoring with Risk Alert Query's, E1 Pages, Watchlists (UDOs)



Efficient Access Approval Workflows to Control JDE Role Assignments, Security & Menu Changes



Streamlined Security Model & Segregation of Duties Built on Standard JDE Roles - No Additional Functions or Components



Complete JDE Security Training & AI Enhanced Support Portal is Available to Customers



What software modules are available?

Access Reporting

User Productivity

Security Management

Project Acceleration

Risk & SoD Management

Access Change Management

Risk Auditing

E1 Modules



Risk Reporting



Risk Management



ProfilePlus



SecurityPlus



MenuPlus



CombiRoles

Data Modules



StartOut
Security Data



SoDMaster
Best Practice Rules



UXPlus Risk Alert
Delivered UDOs

Database Modules



TRACE for IBMi &
Oracle Database



Implementing Access Change Control in JD Edwards



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Agenda



- What is Change Control for Security
- Technical requirements
- Implementing Change Control



What is Change Control for Security?



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Change Control

- Change control is a systematic process for managing and documenting proposed changes to a project, system, or product. It involves identifying, evaluating, and approving or rejecting modifications to ensure minimal disruption and efficient resource utilization.



Does security have change control?

- Yes!
- JDE is configurable and allows you to implement very customizable configurations
- It is not setup by default
- It DOES work and many clients have implemented it



It's NOT Magic!

- Make changes to security within a role
 - F00950
- Make changes to role assignments
 - F95921 (+ others)
- Process changes manually – dual entry
- Choose a partner with automated tools and processes





Technical Requirements



Choose your strategy

1. Security changes
2. Role assignment changes
3. Both!



DOCUMENT!!

- Understand your change control options
- Document your strategy and configuration
- Develop your process BEFORE making any technical changes
 - Develop and document Emergency Change processes
- Communicate and validate your configuration + your process with everyone, especially any consultants!



Security only

Multiple Tables - Security

- Create a copy of F00950
- Create OCM for non-production



NOT supported by Oracle



Role assignments

Multiple Tables - Roles

- Create a copy of F95921, F0093, F00926, F00941
- Create OCM for non-production



NOT supported by Oracle



Configuration

- Keep Production pointing to the original tables
- If using ONLY for PD, ensure no other environments are allowed in the web instance



***Segregate
Environments!***



JAS Server & Instances

- JAS Server vs JAS Instance
 - 'Physical' server hosts multiple virtual instances
 - Environments mapped to different security tables CANNOT be on the same JAS instance



Important Note on new Roles

- New roles update multiple tables:
 - F0092: Role header
 - F0093: Environments
 - F00926: Description and Sequence
- F0092 is common, other tables are split
- Environments **MUST** be in the Prod F0093 table for the role to work, even in non-prod





Implementing Security Change Control



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New Tables

- COPY the original tables to the new datasource using OMW, according to your PLAN!
- Validate the tables copied and the data matches



OCM Mappings

- Create OCM Mappings for a single user for a fat client environment
- TEST and ensure changes are occurring in the desired tables only
- Once verified, create OCM mappings according to your documented plan
- Restart all JDE services, verify again before allowing users in



Sample Mappings

ENVIRONMENT	TABLE	MAPPING
DV920/JDV920	F00950, F95921, F00926, F0093, F00941	J-ENTDV01 – 920 Server Map
PY920/JPY920	F00950, F95921, F00926, F0093, F00941	J-ENTDV01 – 920 Server Map
QA920/JQA920	F00950, F95921, F00926, F0093, F00941	J-ENTDV01 – 920 Server Map
TRN920/JTRN920	F00950, F95921, F00926, F0093, F00941	J-ENTDV01 – 920 Server Map
PS920/JPS920	F00950, F95921, F00926, F0093, F00941	System - 920
PD920/JPD920	F00950, F95921, F00926, F0093, F00941	System - 920



Manual Change Control

- Manually track changes to Security or Role Assignments
- Test, Validate, and Approve done via Excel or...?
- Perform dual entry in Production

<input type="checkbox"/>		User	Role	-	Effective Date	Expiration Date	Include In All	Reason Code	-	Authorized By	Explanation	Audit User	Audit Pgm	Audit Date	Audit Time	Attachment
<input type="checkbox"/>		JMILLER	03CREDIT		03/12/2025		1	P		CHGAPPRV	Change Control Webinar	BCONNOR	PAOS0002	05/05/2025	165241	*see attachment: https://questoraclecommunity.org/...



Manual Change Control

- Potential for being mis-keyed in Production
 - Export from the grid for security and role assignment changes
 - Paste the exported data into Production
- Manual entry= Double the time per change

- Easier to bypass the process



Automated Change Control

- More time up front to define the process
- Enforce defined Policy
- Promote changes to Production
- Auditable

Configure Security Change Control Features (SCC)

✓ ✕ ⚙ Form ⚙ View ⚙ Tools

Use Security Change Control (SCC) Features

Enable 'FIX-MERGE' in Final Mode:
(1) of Child Roles to SUPER-ROLES: Security Menu
(2) of Child Roles to USER-LEVEL: Security Menu

Allow 'FIX-MERGE' to simultaneously 'PROMOTE' to different environment

Default Promotion Environment when Fix-Merging (in Proof mode only)

Source: *USELOGIN
Target: *USELOGIN

Enable 'PROMOTION' in Final Mode:
(3) of ROLES only: Security Menu Assignments
(4) of GLOBAL (All Data) or USER-LEVEL: Security Menu Assignments

Configure Environments for Promotion

Source: JDV920 * Data Source Cannot be Verified using Web * Allow PO+Template Override Allow Screen Override
Target: JPY920 * Data Source Cannot be Verified using Web *

Limit what Security Change Control (SCC) UBEs will Update

Use Change Controls: [Changes to access within JDE will set the 'Changed Status' flag and clear the Control flags automatically. UBEs run in final mode clear both Change Status and Control flags. The Users & Roles that the UBEs can select and update are restricted using the filters below.](#)

'CHANGED Status' Filter SoD 'VALIDATION' Control [Test] 'APPROVAL' Control

Choose what is MARKED for SCC UBE UPDATE following changes using ALLOut screens (i.e., Changes can be 'SoD Validated' and '(Test) Approved')

(a) ROLES for:
(b) USER-LEVEL for: User-Level Security
(c) PUBLIC for:

[Choose when 'Changed Status' filter flag is set on - click question mark for list of programs making changes](#)

Set on for User-Level - when modified directly (for Security PROMOTION)
 Set on for User-Level - when changes within or of - assigned (child) Roles (for Security FIX-MERGE)

Choose to PREVENT the UNCONTROLLED UPDATE of JD Edwards data by Security Change Control UBEs

ENFORCE SoD Validation ENFORCE [Test] Approval

(d) of ROLES: Security Menu Assignments
(e) of USER-LEVEL: Security Menu Assignments
(f) of PUBLIC: Security



Automated Change Control

- Flexible Process, defined by you
- Can be changed over time as your process matures

Configure Role Assignment Request + Approval (RbAC)

✓ ✕ Form Tools

[Set to Shipped Defaults...](#)

This request process allows users to request Role Assignments - A request must subsequently be 'converted' into an actual Role Assignment in a separate step. Use Approver 'Lists' to limit who can request, convert, and (if using workflow) approve.

Use Role Assignment Request and Approval Process (RRA): -

WITHOUT Workflow (single-step approval/assignment creation)
Convert Requests into actual F95921 role assignment records using a single 'Conversion' step - i.e. there is no extra 'Approval' step.

WITH Workflow (multiple-step approval/assignment creation)
Convert Requests into actual F95921 role assignment records using a minimum 2 steps - i.e. an 'Approval' prior to the actual 'Conversion'

Prevent Assignment Creation outside of Request process

Force use of PAOS0059 for Status Changes and Approval

Allow use of PAOS0059 OR PAOS0002 for Status Changes and Approval

Allow Rejected Requests to be Re-Requested

Delete Rejected Requests

Reject Expired Requests

Send work center messages to Users: Notify User (role recipient) when Assignment Created Notify Requestor when Assignment Approved OR Rejected

Define Process | **Customize Workflow Steps** | **Apply 'Role Assignment Restrictions'**

RESTRICT Requests using 'Lists' - i.e. using combinations of Users [role recipients], requested Roles, and assignment Approver RESTRICT Requests using Program Security (F00950) only

Use Lists' Users (role recipients) Use Lists' Roles (requested roles) Use Lists' Approvers (requestor or approver or converter)

[MAINTAIN 'List Approvers' \(click 'Maintain Approver Lists'\) to control the authority of individual approvers to the assignment creation steps below](#)

Allow processing options of Role Request and Approval Programs (PAOS0002 and PAOS0059) to override these controls [Maintain Approver Lists ...](#) [Work Center Messages ...](#)

Assignment Creation Steps

Only Lists' Approvers can request Assignment

Only Lists' Approvers can change Request Status (Approval Flag to/within W)

Only Lists' Approvers can approve Request (Approval Flag to Y)

Only Lists' Approvers can convert Approved Request into Assignment

Override - Anyone can Request Allow for own User only

Override - Anyone can Change

Override - Anyone can Approve Prevent for own User

Override - Anyone can Convert Prevent for own User

Send work center messages to Approvers: Notify All eligible Lists' Approvers of New Requests Notify All eligible Lists' OTHER Approvers (if any) after Approval/Creation/Rejection



Workflow

- Define workflow routing
- Enforce defined Policy
- Customizable to your needs
- Auditable

Define Process | **Customize Workflow Steps** | Apply 'Role Assignment Restrictions'

*** Workflow IS in use ***

Use 'Maintain Workflow Statuses' to define your workflow. You must define at least one status for each of the 'new', 'approved' and 'rejected' statuses. Other statuses are optional.

Workflow Routing Rule

Allow any active Workflow Status code to be applied

Require use of each active Workflow Status code in numeric sequence

Require use of each active Workflow Status code as defined by status activity rules

Maintain Workflow Statuses ...

Maintain Approver Lists ...



Role Restrictions

- Decide how you want to use it
- Enroll multiple approvers and requestors
- Auditable

Define Process Customize Workflow Steps **Apply 'Role Assignment Restrictions'**

*** Role Assignment Restrictions are in use ***

'Role Assignment Restrictions' - enforcing List restrictions and/or requiring attachments - are always applied when a request is converted into an assignment.
Additionally, Role Assignment Restrictions - enforcing List restrictions - can also be enforced or displayed as warnings earlier in the requesting process.

<input checked="" type="checkbox"/> Apply 'Role Assignment Restrictions' on Role Assignment Request:	<input checked="" type="checkbox"/> Show Warnings	<input checked="" type="checkbox"/> Block Assignments
<input checked="" type="checkbox"/> Apply 'Role Assignment Restrictions' on change of Request Status (Approval Flag to/within W):	<input checked="" type="checkbox"/> Show Warnings	<input checked="" type="checkbox"/> Block Assignments
<input checked="" type="checkbox"/> Apply 'Role Assignment Restrictions' on approval of Request (Approval Flag to Y):	<input checked="" type="checkbox"/> Show Warnings	<input checked="" type="checkbox"/> Block Assignments
<input checked="" type="checkbox"/> Apply 'Role Assignment Restrictions' on conversion of Request into Assignment:	<input checked="" type="checkbox"/> Show Warnings	<input checked="" type="checkbox"/> Block Assignments



Leveraging change control solutions

- **ALLOut Security** delivers **flexible change control software**
- Choose to Test/Approve menu, security or role assignment changes
- Validate access changes to ensure there are NO SoD Breaches!
- Audit trail with option to attach supporting documentation



***Promote Security, Menu or
Role Assignment Changes
Across Environments***



UXPlus Risk Alert – UDOs by ALLOut Security

ORACLE JD Edwards Tanya (JOB23)

ALLOut Menu AOS Alert-1 Change Overview AOS Alert-2 Change Audit AOS Alert-3 SoD Audit AOS Alert-4 Access Audit **AOS Alert-5 Access Approval**

All Matches Warning Critical

0 Role Requests-Open 0 Role Requests-Approved 3 Role Requests-Status 10 0 Role Requests-Status 20 0 Role Requests-Status 30 1 Role Requests-Status 90 9 SCC-Users-Open Chan... 0 SCC-Roles-Open Chang...

3 SCC-SuperRoles-Open ... 0 SCC-Public-Open Chan...

Approve Role Requests Query: All Records

Use row exits to convert/reject requested roles as defined within configuration. Please note that Security Change Control and its approval process is unrelated to this Role Requesting approval.

Show

Requests Awaiting Approval / Conversion My Requests Only Existing Role Assignments

Sequence by Sequence by User Sequence by Role

Show Additional Information

User/Role Descriptions All Descriptions Security Change Control Status

Use row exit 'Set Status' to Update Status to: Status: 10 Requested

User	User Description	Request Action	Approval Flag	Status Code	Role	Role Description	Requested Effective Date	Requested Expiration Date	Reason Code	Requestor	Authorized By	Expla
<input checked="" type="radio"/> AOSSTEPH	Eastern Area Distribution Center	A	W	10	01PROC	AB Periodic Processing	03/15/2022		J	MONICA		
<input type="radio"/> AOSSTEPH	Eastern Area Distribution Center	A	Y	90	03DEBIT	AR Automatic Debiting	03/15/2022		J	MONICA		
<input type="radio"/> DEMO-DAVID	David	A	W	10	43PURCH	SM Purchasing	02/13/2025		J	AOSTANYA		
<input type="radio"/> DEMO-MATT	Matt	A	W	10	43PURCH	SM Purchasing	02/19/2025		J	AOSTANYA		

Security Change Control Approval Query: SCC - Open Changes

Approval functionality (without Workflow) has been enabled within ALLOut Feature Configuration - use the row exits to update the Appr ALLOut Feature Configuration.

Security Change Control Approval

Show

Users Super-Roles Roles PUBLIC Show Changes Only Descriptions

Records 1 - 9

User	Security/Menu Changed	Assignments Changed	Validation Flag	Approval Code	Approval Date	Approval Time
<input checked="" type="radio"/> AOSAIDY	S	A		W		
<input type="radio"/> AOSALEX	B	A	N	Y	02/26/2025	17:30:33
<input type="radio"/> AOSTANYA	B	A		W		
<input type="radio"/> AOSTONI	B	A		W		
<input type="radio"/> DEMO-BOB	S	A		W		
<input type="radio"/> DEMO-JAMES	S	A		W		
<input type="radio"/> DEMO-KEITH	S	A		W		
<input type="radio"/> DEMO-KELLY	S	A		W		
<input type="radio"/> DEMO-KIM	S	A		W		



Track & Approve Changes in JD Edwards

Supported by ALLOut Security

Security Change Control Approval

Query: SCC - Open Changes

Row Tools

Approval Code: (M)PUBLIC Show Changes Only Descriptions

Records 1 - 10

	User	Security/Menu Changed	Assignments Changed	Validation Flag	Approval Code	Approval Date	Approval Time
<input checked="" type="radio"/>	AOSAIDY	S	A		W		
<input type="radio"/>	AOSALEX	B	A	N	Y	02/26/2025	17:30:33
<input type="radio"/>	AOSTANYA	B	A		W		
<input type="radio"/>	AOSTONI	B	A		W		
<input type="radio"/>	DEMO-BOB	S	A		W		
<input type="radio"/>	DEMO-JAMES	S	A		W		
<input type="radio"/>	DEMO-KEITH	S	A		W		
<input type="radio"/>	DEMO-KELLY	S	A		W		
<input type="radio"/>	DEMO-KIM	S	A		W		

Security Change Control: Changed Status

Tools

The 'Changed' flag shows if changes have been made to Users or (Super)Roles

Records 1 - 6

Option	Description
<input checked="" type="radio"/>	Do Not Filter
<input type="radio"/>	1 Show Users/Roles which have ANY changes to Security OR Menus
<input type="radio"/>	B Show Users/Roles with Changes to Security AND Menus
<input type="radio"/>	M Show Users/Roles with Changes to Menus
<input type="radio"/>	S Show Users/Roles with Changes to Security
<input type="radio"/>	0 Show Users/Roles which have NO changes to Security OR Menus OR Assignments





Questions?

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How Can We Help?

Talk with us!



Blueprint 4D

June 9-13 | Las Vegas

- Booth 415
- Making the case for Change Control: P050015 June 13 @ 10AM Lando 4304



User Groups

- Houston: May 22
- PLUG: June 9
- Houston: July 21
- ...and more



Video Podcast

Not Your Grandpa's JDE
presented by ERP Suites

Now available on YouTube
and Spotify