



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



## AI & Generative AI

Integrating your business data with emerging technologies



## JDE Consulting

Develop, implement, and support JDE applications

## ERP Suites Products

**ORACLE**  
JD EDWARDS



### Clarity

Synthetic monitoring and alerting to help JDE system admins



### Scanability

Fast ROI with modern JDE barcode scanning



### Mobility

JDE data and task management to mobile devices

# ERP Suites Services



## Business Advisory Services

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



## Functional Consulting Services

- JDE Distribution & Warehousing
- JDE Manufacturing
- JDE Financials
- JDE Human Capital Management
- Managed Services
- UXOne Expertise
- User Defined Objects
- Orchestration Design & Build



## Technical & Infrastructure Services

- Technical Refresh
- Technical Upgrades
- Cloud Migrations
- IBM iSeries Administration
- Cloud Administration
- Networking & Server Infrastructure
- Identity Management
- Cybersecurity

# Trusted Advisors

## For JDE Users

unlocking  
efficiency



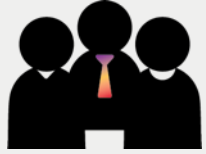
boosting  
profitability



ORACLE

Partner





# 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

erp  
suites

20 years  
**ALLOut**  
Security



# Implementing Access Change Control in JD Edwards



May 21, 2025



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ERP Suites



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Partnership & Alliances  
Director

ALLOut Security

# Agenda

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



Today's  
Agenda



# 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: <a href="https://questoraclecommunity.org/...">https://questoraclecommunity.org/...</a>



# 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) Approval')

- (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

erp  
suites

20 years  
**ALLOut**  
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 type="checkbox"/> Apply 'Role Assignment Restrictions' on conversion of Request into Assignment:	<input type="checkbox"/> Show Warnings	<input 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

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
AOSSTEPH	Eastern Area Distribution Center	A	W	10	01PROC	AB Periodic Processing	03/15/2022		J	MONICA		
AOSSTEPH	Eastern Area Distribution Center	A	Y	00	03DEBIT	AR Automatic Debiting	03/15/2022		J	MONICA		
DEMO-DAVID	David	A	W	10	43PURCH	SM Purchasing	02/13/2025		J	AOSTANYA		
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

User	Security/Menu Changed	Assignments Changed	Validation Flag	Approval Code	Approval Date	Approval Time
AOSAIDY	S	A		W		
AOSALEX	B	A	N	Y	02/26/2025	17:30:33
AOSTANYA	B	A		W		
AOSTONI	B	A		W		
DEMO-BOB	S	A		W		
DEMO-JAMES	S	A		W		
DEMO-KEITH	S	A		W		
DEMO-KELLY	S	A		W		
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 Status: ALLOut Feature Configuration - use the row exits to update the Approval Status

Security Change Control: Users

Set Approved

Set Rejected

List Inquiry

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		

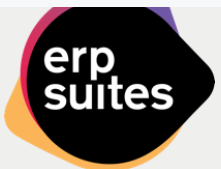
Security Change Control: Changed Status

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?

Brian Connor [BConnor@ERPSuites.com](mailto:BConnor@ERPSuites.com)



# 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