



# The Power of Utilizing UDOs & JDE Security Considerations



WHITEPAPER

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# About ALLOut

## Who we are

ALLOut is the market-leading security solution for JD Edwards, bringing you the enhanced functionality you need, directly in your E1 or World environment. It's easy to install! There's no need to work with your data outside of JD Edwards, reducing risk & allowing you to maximize existing ERP resource without the need for your team to learn a new system.

## Our mission

Our mission is to deliver simple security, streamlined processes & auditable reporting. We believe in providing cost-effective solutions to simply secure and protect organizations against emerging risks. You can rely on our market-leading security, audit & compliance toolset for JD Edwards.

# Abstract & Scope

As with most modern ERPs, JD Edwards EnterpriseOne has introduced many new pieces of functionality in the past decade. It's clear from more recent releases that improved user experience and low-code have become the focus. One of Oracle's popular JD Edwards innovations is User Defined Objects (UDOs), which aim to empower IT teams to achieve more with less, reducing the requirement for developer involvement.

*In this white paper, we discuss the benefits of using UDOs and the key JD Edwards security considerations your team will need to have in mind when implementing or managing them.*



# Part 1

## UDO Feature, Types & Benefits

### Introduction

#### **What is a UDO, and how can adopting them be beneficial to your organization?**

UDOs released on JD Edwards Enterprise 9.2, help simplify user experience by making information easier to manage and use while carrying out tasks. These versatile and customizable web-based objects are created using an added layer of code with an E1 web interface and are, as their title suggests, user friendly. Citizen developers with specified access can create, view, modify and share them without having extensive IT experience.

# The importance of UDOs in your organization:



- **UDO's optimize task functionality without requiring technical training, making IT workforce scarcity less of a looming concern and more of a workable solution:**
  - As Gartner's 2021-2023 'Emerging Technology Roadmap for Large Enterprises' study states: "Talent Shortages are a rising and significant challenge for successful adoption of emerging technologies."
- **UDO adoption helps organizations invest in existing resources rather than burden IT departments with added tasks and responsibilities:**
  - Employees are looking for more regarding job-satisfaction, flexibility, and better working conditions overall. Not less.
  - As Jonas Prising from ManpowerGroup comments in their 2022 global 'Employment Outlook Survey': "Organizations continue to focus on attracting and retaining people as competition for employees remains fierce, even two years after the pandemic first began."
- **UDO adoption limits unnecessary costs and risks of IT outsourcing:**
  - Relying on external contractors to maintain internal software functionality leaves organizations vulnerable to additional costs, time-wasting, and business practice disruptions.
- **Enabling decision makers to gather and transform data from multiple streams into useful information:**
  - This value-added benefit includes alerts on issues within business operations, delivery of required information for next-step analysis and connecting the right users with the tools to act accordingly.

# Enhancing User Experience

The benefits of using UDOs are linked to the predefined and customizable types available. Each type features functions that enhance user experience and productivity through personalized options that can be activated or deactivated when needed. Furthermore, citizen developers can access these features without IT intermediary support. When managed securely, UDOs enhance user experience through the highlighted features mentioned in the following page:

# Common UDO features



- Customizable options to view and manage data more conveniently using grid formats.
- Design private and public query parameters that put information at your fingertips.
- Manage and easily access frequently used graphics, images, and logos.
- Create personalized forms to support unique business needs with restricted or expanded user access.
- Easy access to essential and real-time information within areas such as sales, customers, inventories, and suppliers with optional layouts.
- Create, view, and share watchlists that alert users on vital information and tasks requiring monitoring or approvals such as purchase orders and credit thresholds.

## What are the different UDO types available?

- Cafe1
- Composite Page
- E1 Page (Classic)
- Grid Format
- Form Extensions
- Image
- Notification
- OneView Reports
- Orchestrations
- Personal Forms
- Query
- Process Recorder
- Rule
- E1 Search
- Service Requests
- Watchlist
- Data Browser
- Task Search
- Whitelist
- X-Reference
- Schedule



# UDO Management Lifecycle



The management lifecycle of UDOs is organised in a way that enhances ease of use. The following illustrates how this design is structured in stages from creation to publication:

## Standard UDO Architecture



By merging stages of development with security authorizations the UDO process is consistent. The two prerequisite tools used to support this process are:

**P98220W:** Web Object Management Workbench primarily helps users create projects, integrate UDOs within existing projects, import UDOs into JDE, and promote UDOs.

**P98220U:** is an application that manages the security status and publication of UDOs configured through approval, denial and view security.

# Part 2

## Key UDO Security Considerations

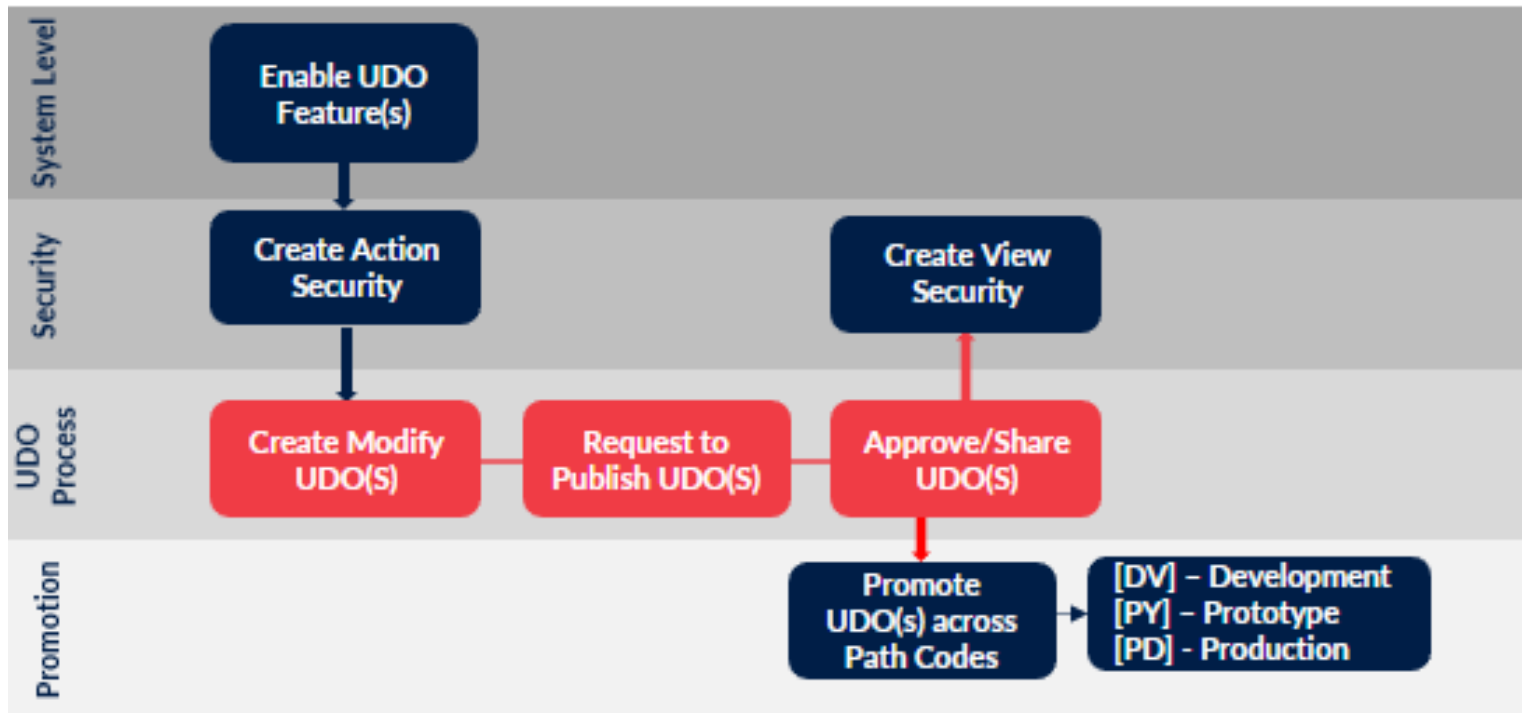
### UDO Security Monitoring Benefits

The growth of UDO adoption within organizations using JDE software is fast becoming standard practice. A recent survey conducted by the UDO Special Interest Group (SIG) reported that over 70% of organizations worldwide are utilizing UDOs. Before accessing their advantages however, there are vital security considerations that must be addressed and managed. This is best illustrated in the following diagram:

# Monitoring Benefits Continued



## UDO Management - The "Big Picture"



Implementing safeguarding strategies throughout the UDO lifecycle is essential despite being a complex process in standard JDE. When placed strategically in the UDO lifecycle, security controls act as a buffer between user access and risk management by enabling and preventing role-based actions.

As market leaders in JDE security, auditing, and data compliance initiatives, our ALLOut specialists suggest the following to help you achieve the anticipated value of UDOs while mitigating the operational risks involved in configuration and management.

## Security Concerns

Defining who can create, modify, approve, publish, share, and view UDOs is subject to best business practices policies, which are usually hard to achieve using standard JDE software. As with all process-based roles, UDO functionality only becomes optimal with security and automation tools that mitigate and resolve issues such as:

- Role sequencer conflicts
- Troubleshooting
- User access reviews

### **These issues translate more specifically to UDO management as:**

- Combining multiple UDO structures and pathway filters.
- Manage UDO watchlist security by defining who can create, view, and share them.
- Set up risk alerts that track and report on changes made.
- Resolve UDO sequencer conflicts using process-based roles in conjunction with ALLOut's 'Fix/Merge' toolset.



# UDO categories for organization

When it comes to who can create and modify UDO's, it is essential to have a strategy in place that can guide users toward better accessing the software and information they need. Setting up user security for each UDO will take up time and essential resources, while granting user access to all UDOs can lead to human error or intentional misuse. ALLOut's answer is to categorize UDOs according to business processes, and grant access according to a user's specific role (see below).

## ALLOut's UDO Categories

### (Form) Customization

- Grid Format
- Form Extension
- Personal Form

### (Data) Queries

- OneView Report
- Query
- Watchlist
- E1 Search
- Data Browser

### Pathways (Program Access)

- E1 Page (Classic)
- Composite Page
- Cafe1
- Image
- Task Search

### Orchestration (and Components)

- Orchestration
- Notification
- Process Record
- Rule
- Service Request
- Whitelist
- X-Reference
- Schedule

# Testing and Environments

ALLOut advocates the value of testing all application software, including UDOs, before going live and doing so within specified environments to avoid organizational and database disruptions. Having security in place to determine which user can access developer, prototype, and production (live) environments is vital, as each category of UDO's has varying impacts on sensitive and high-risk data. When categorised as above, pathways enhance serviceability, efficient productivity, mitigates risk and bypasses menu disorientation.

## Manage security in one place:

Simplifying UDO security is an objective that ALLOut has developed tools for, such as the SuperGrid, which alleviates the challenges of UDO user access maintenance (F00950W) within standard JD Edwards. The advantages are:

- Manage UDO Security from a single screen to monitor and modify information on user access on either fat client or web, while updating your standard JD Edwards security table simultaneously.
- "1-Click" row exits allow you to create, modify and update multiple security records via a single click using predefined defaults.
- Manage multiple records (including copy & paste) simultaneously.





# Conclusion

When it comes to integrating UDOs into your business practices to enhance usability, productivity, and bypass IT workforce scarcity, it is in your organization's best interest to do so securely and deliver on appropriate enterprise risk management objectives. Although there is no unified approach to UDO adoption since their use is tailored to best suit your organization's requirements, there are however, best practice configuration, management, and security risks that every organization must consider. This way, employees, IT managers and stakeholders can rest assured that business interruptions are minimized in the process and that UDO adoption is seamlessly integrated with audit and compliance efforts.

To learn more about how ALLOut's market-leading security solutions can best help you achieve security, compliance and audit initiatives with UDOs, please visit our website [www.alloutsecurity.com](http://www.alloutsecurity.com).





# Get in touch

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