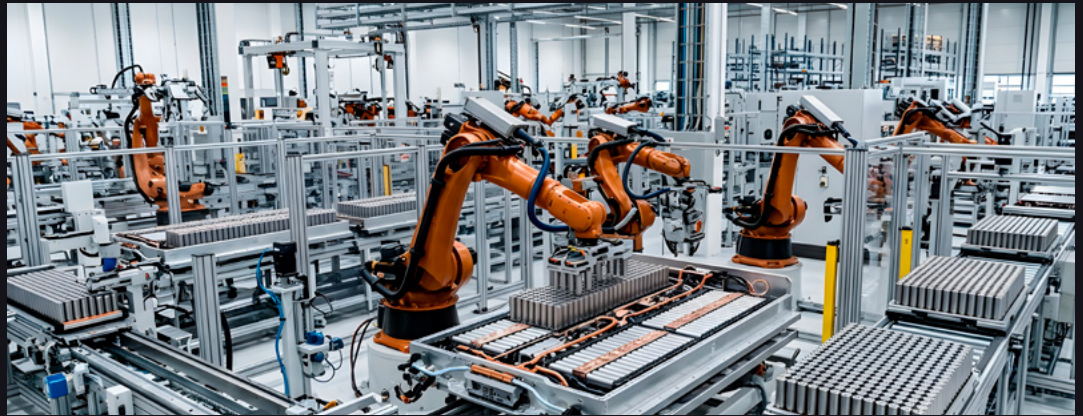




CASE STUDY

JR Automation & Sequence Enterprise: From project platform to process engine



Key facts:

Company:
JR Automation

Website:
www.jrautomation.com

Industry: Industrial
automation &
technology

Region: Global
(headquartered in
North America)

Octave products used:
Sequence Enterprise
(EcoSys)

Global provider of intelligent automation and advanced manufacturing systems, JR Automation adopted Sequence Enterprise as its project portfolio management platform, its global project management office (PMO) found an inventive new use for the solution. The team needed a single, governed home for their everyday business processes – approvals, reviews, corrective actions and hand-offs – that decide whether work moves forward. Could Sequence Enterprise do both jobs well?

One system, or one more system?

The turning point came during a new enterprise resource planning (ERP) rollout. As the JR Automation team mapped how work would flow through the new system, a gap became clear: the ERP alone could not manage the company's business processes with the structure and control the PMO expected.

That left leadership with a familiar choice. It could add yet another standalone workflow tool to the stack, or it could ask more of the platform its teams already trusted for project portfolio management.

Key challenges included:

- **Fragmented processes** – Business processes scattered across point tools and manual hand-offs, with no single source of truth
- **ERP gaps** – An ERP that, on its own, could not enforce the structured process control the organization needed
- **System sprawl** – The cost and risk of introducing another separate system, each with its own security model to manage
- **Disconnected data** – Project data and process data living apart, so the work behind a project was disconnected from the project itself
- **Weak governance** – Inconsistent governance, making it hard to prove that every step in a process had been followed

The PMO had run structured workflow engines in other settings and knew what disciplined process management looked like. The team set out to bring that same discipline into Sequence Enterprise rather than alongside it.



Setting the vision

The approach centered on a well-established idea from process engineering – the state machine. In a state machine, every item of work sits in exactly one defined state at any moment. It moves to the next state only when set conditions and validators are met, and those transitions can be triggered by a person or by the system. Applied across the enterprise, that model gives every process a clear, governed path from start to finish.

The PMO's aim was to replace scattered, informal workflows with a repeatable, auditable engine that lived where the project data already was.

Why Sequence Enterprise

After weighing its options, the PMO chose to build the process engine inside Sequence Enterprise because the platform's data model was flexible enough to support it.

Sequence Enterprise offered:

- **Configurable data model** – An open canvas of attributes, in effect, so each process could carry exactly the fields it needed
- **Adaptable Issue module** – A platform capability the team shaped into a container for structured, workflow-driven processes
- **Assignable tasks** – Working forecast transactions that could act as tasks, each with its own workflow and owner
- **Connected project data** – Direct links from process records to cost objects, contracts and other project data already in the system
- **Outward integration** – Ready connections to the team's collaboration channels and shared content across the web
- **One security model** – Consistent access control, rather than a new layer to build and maintain

The impact

Each process is modeled as an issue tied to its cost object, so it lives with the project and financial data it relates to. Because every issue type carries its own attributes and workflow, one platform can support dozens of distinct processes side by side.

The workflow is a governed state machine: a process advances toward completion only when each transition's conditions are met, so required steps can't be skipped. "All-state" transitions – cancel, reject or place on hold – are available when a process breaks from its normal path, and built-in escalation raises an item for higher attention, including executive review.

Work happens at the task level. Each issue holds one or more tasks assigned to named owners, so every person sees a role-based dashboard of the work they own while managers track the process as a whole.

A structured 8D corrective-action process is one example – a single-issue type with its own eight-stage workflow that moves a team from problem containment through root-cause analysis to lessons learned, replacing a process otherwise run by memory and email.

Key outcomes included:

- **One platform** – Both the project portfolio and the day-to-day business processes behind it, with no separate workflow tool to license or maintain
- **Processes at scale** – Dozens of distinct processes modeled as governed, repeatable state machines
- **Role-based visibility** – Task dashboards that show each person the work they own and each manager the status of every process
- **Built-in governance** – A clear audit trail and escalation paths across every process
- **Connected context** – Process records tied directly to project and financial data, so nothing is lost between systems
- **Single security model** – One layer of access control to manage, rather than duplicating it in a downstream system

Just as important, the team proved a point about the platform itself: a system bought for project portfolio management could carry the structured process work an organization runs on.

The road forward

JR Automation is now preparing to migrate to Sequence Enterprise 10 and continues to expand its use of the platform. Next steps include extending process work into the field through mobile access, so teams can act on and update work from the plant floor, along with modeling additional process types as the business evolves. The company is also working closely with Octave on enhancements to notifications and in-context collaboration that will make the day-to-day experience richer still.

With Sequence Enterprise as the foundation and Octave as a long-term partner, JR Automation is positioned to run more of its business – projects and processes alike – on one connected system.

Ready to run your projects and processes on one platform?

[Learn more](#)

[Contact us](#)

About Octave

Octave is a leader in enterprise software, turning data into decisive action and intelligence into your edge. Our software solves for and simplifies complexity, from the design and build to operations and protection of people, property, and assets– for any scope, at any scale. For decades, we've partnered with customers to sharpen performance, elevate efficiency, and amplify results. From factory floors to entire cities, our solutions are tuned to scale up what's possible from day one onward.

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