



JD Edwards

INFOCUS

ENVISION

JD Edwards Day One

Presented by:

Joel Schipper and a panel of friends

Session ID

100050

Objectives

- Gain a bird's eye view of what's in “JD Edwards Day One”
- See how you can reduce the stress of building your “JDE” team when making new hires
- Learn how your college can get access to this course

Poll #1

- Had you heard about “JD Edwards Day One” or “JDE101” before today?

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Agenda

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Introductions	5
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Panel Discussions	
- Why should a student care?	10
- Why should an employer care?	10
- How this program can help you	5
Q&A	10
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Panel Moderator — Joel Schipper



- 21 years JD Edwards Sales Consultant — Retired in 2014
 - Occasional consulting advice as Enterprise Software Insight
 - Focused on maximizing the return from business application systems
- Envisioned an opportunity to introduce college students to ERP
 - Co-founded “JDE101” — a first step
 - Morphed into “JD Edwards Day One - an Introduction to ERP” for college students at Kansas State University (KSU)
 - Discovered a lot of student interest in “What is ERP?”
- Passionate about “paying it forward”



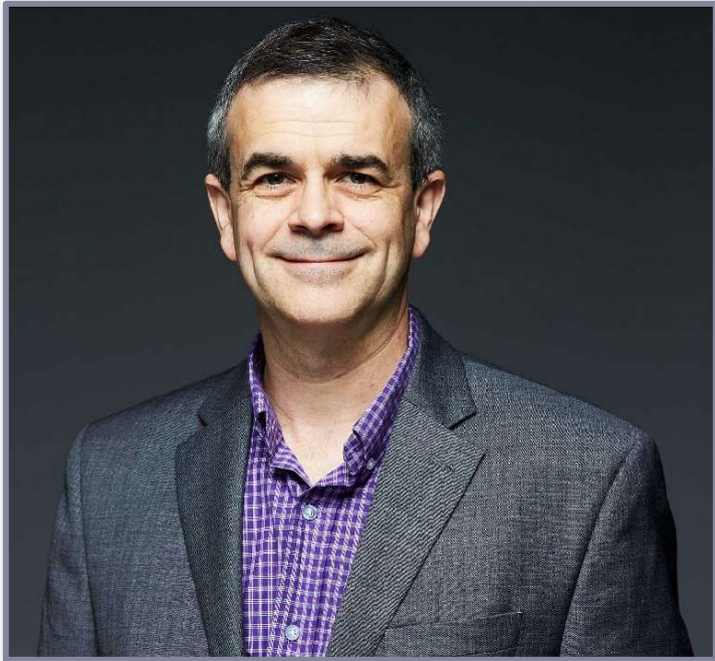
Panelist - Carl Goossen



- CFO of Wichita Furniture & Mattress and Ashley HomeStore locations in Wichita, Kansas
- Connected the vocational skill development concept of “JDE101” with the goal of Kansas State University School of Business to deliver graduates with skills to attack real world challenges.
- Executive-in-Residence for initial course development and delivery
- Architect of business data for optimal insight to action while minimizing hybrid processes
- Passionate about ERP-readiness of college graduates



Panelist - Roger McHaney



- Daniel D. Burke Chair for Exceptional Faculty
- Professor and University Distinguished Teaching Scholar
 - Management Information Systems
 - Kansas State University
- Sponsor of JD Edwards Day One program at KSU
- Focus on Cloud Computing and Business Computing Use
- Passionate about Preparing Students for their Future Careers



Panelist – Elizabeth Schriefer



- Owner & President of iLearnERP — an ERP training and change organization
- Original contributor to “JDE101” and hired a graduate from its inaugural course
- Provider of End User Academy and hands-on “demo” practice system for JD Edwards Day One
- Focused on organizational learning and transformation during digital adoption projects
- Passionate about just-in-time, distance learning

iLEARNERP

Panelist - Chris Dennis



- JD Edwards supply chain professional at “New Sabina Industries”
- Instructor at Columbus State Community College (CSCC) for JD Edwards Day One - Fall/2020
- Focused on giving my students the best possible education of supply chain and logistics technology
- Passionate about giving my students the ability to solve real-world problems with practical solutions



JD Edwards Day One - A brief history

- Carl Goossen heard of JDE101 as a way to introduce college students to ERP
 - Connected Joel to Dr. McHaney (“Roger”) to discuss this as “advanced vocational training”
 - Together we created an initial course at Kansas State as a consulting assignment sponsored by PCB Apps
 - 12 students of the B-School took it in Winter 2018
- Joel and Roger obtained KSU grant in 2019
 - Redeveloped the course to meet distance learning standards
 - Ran a pilot with 2 graduate students doing independent study
 - Created partnership with iLearnERP for a live practice environment and additional learning materials
- Chris Dennis facilitated a copy of the course at CSCC in 2020. Now a required course for L.E.T. degree.
- Joel and Roger are running full 3-credit class now, Spring 2021, at KSU
 - 4 Master degree candidates in Data Analytics are taking this as an elective course
 - All want to know “What is ERP?”
 - Two are in their 20’s; one is second career post-military; one is 30 year DB staffer at BC/BS
 - Prepared material is supplemented with a weekly recorded “coaching call” over Zoom

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What is JD Edwards Day One?

- A college-level introduction to ERP
 - Overall introduction to ERP systems — the why and the how
 - JD Edwards EnterpriseOne is the hands-on example
 - Students use a modern user experience — UXOne
- Follow a “distribution” company from G/L setup through Procurement, Inventory, Sales, and Financial Reporting
 - Use the familiar JD Edwards “Company 0001”
 - bicycle parts, addresses 4242, 4343, branches D10, D30, etc.
 - Optional lesson on basics of “job costing”
- Includes overviews of “JDE” security and Digital Transformation

Course and Lesson Content

- 15 lesson program supports a semester or a full year
 - Student time runs from 4 to 8+ hours per lesson
- All materials are stored on-line
 - All lectures pre-recorded
 - Extensive written lecture notes and practice guides
 - Illustrative “PowerPoints”
 - Extensive, optional “additional materials” e.g., articles
 - Access to professional training materials through iLearnERP
- Guided hands-on practice or “lab work” with iLearnERP’s demo system
- On-line QUIZ for each lesson
- Suggested weekly Zoom ‘coaching call’ for open Q&A ... and interesting side discussions

Typical Lesson Outline

- Video intro
- Recorded Lecture
- PowerPoints and video walkthroughs
- Detailed lesson notes
- Optional extra materials
- Pre-recorded UPK segments
- Suggested use of iLearnERP's End User Academy content
- Guest lecture by Sherri Conrady of AllOut Security for lesson 7B
- Guided hands-on practice notes
- Multiple choice / T-F QUIZ
- Sample lesson walkthrough

[Welcome Message](#)

[More about your Teachers \(and How to Reach Us\)](#)

[Global Campus Resources for Students](#)

[0 - Course Overview Material](#)

[1A - Introduction to ERP](#)

[1B - EnterpriseOne Foundation](#)

[2A - Address Book](#)

[2B - UX One](#)

[3A - General Ledger \(GL\)](#)

[3B - Project \(aka Job\) Costing \(JC\)](#)

[4A - Procurement \(Purchasing\)](#)

[4B - Accounts Payable \(AP\)](#)

[5A - Inventory Management](#)

[5B - Inventory Accuracy](#)

[6A - Sales Order Management](#)

[6B - Accounts Receivable \(AR\)](#)

[7A - Financial Statements](#)

[7B - JD Edwards Security](#)

[7C - Introduction to Digital Transformation and ERP](#)

Student view of a class 'page' in "Canvas"

Assignments	
Discussions	
Grades	
Quizzes	
MyMediasite	
Office 365	
Library Resources	
Modules	🔒
People	🔒
Pages	🔒
Syllabus	🔒
Files	🔒
Conferences	🔒
Outcomes	🔒
Collaborations	🔒
Rubrics	
Settings	

4A - Procurement (Purchasing)

Overview

This class provides you first with an introduction to the Procurement cycle, including how suppliers, purchase orders, receipts, and vouchers for Accounts Payable are entered and managed in the Oracle JD Edwards EnterpriseOne ERP system. Listen to the recorded video introduction. [Video overview Class 4A](#)

You'll gain an appreciation for working with:

1. Items — the things to be purchased
2. Suppliers — the entities selling the items
3. Purchase orders ("PO's") for "stock" (inventory) and non-stock (consumable, non-inventory) items
4. Other common order types related to procurement, including requisitions, quotes, and blanket orders
5. The approval process for PO's
6. The receiving process
7. Matching of PO's and receipt to supplier invoices
8. Performance of suppliers in delivering the right quantity at the agreed upon time and at the agreed upon price.

When you are finished with the UPK practice, you should be able to practice all of the above on your own in the live system.

Note: Classes 4A, 5A, and 6A contain substantially more material than their paired classes 4B, 5B, and 6B. Expect to spend more time on the "A" classes, and less on the "B" classes.

Pre-Requisites for this Class

Be sure to have completed all prior classes.

Teaching Notes

The Teaching Notes contain the specific details for this class. [Teaching Notes 4A - Procurement.docx](#) 📄

This section includes many useful and supplementary tips on working with the Oracle JD Edwards EnterpriseOne Procurement system. But this section is not intended to be a complete training or documentation. Rather, this is an introduction to how purchase orders (PO's) can operate within an ERP system.

Some UPK sections are noted within the Teaching Notes.

Quizzes

- Conducted on-line
- Questions follow from material in the lesson
 - Multiple choice and True/False
 - From 3 to 20+ questions per quiz
- Each question has an explanation of the correct answer
 - Tried to eliminate 'trick' or ambiguous questions
 - Reviewed by a JDE end user
 - Updated to remove narrow "JDE-specific" questions and to align questions with broader ERP concerns

Sample Quiz Questions

Question 5

1 pts

The only two fields that are required on the Purchase Order Header when manually entering a PO are:

- ☐ Inventory Item and Shipping Address
- ☐ Item Cost and Payment Terms
- ☐ Item Location and Supplier Payment Terms
- ☐ Branch Plant and Supplier Address number

Question 8

1 pts

You can mix Stock, Non-Stock, and Non-Inventory (e.g., G/L account) detail order lines on one Purchase Order.

- ☐ True
- ☐ False








Bonus Materials

- Lesson 5B - Inventory Accuracy
- “Everything” a student needs to
 - Diagnose an existing inventory ‘accuracy’ program
 - Establish a cycle counting program with any ERP
 - Conduct cycle counting through JD Edwards
- Immediate real-life job skills

Invaluable Materials

PowerPoints

1. [Cycle Counting Basics](#)
2. [Cycle Counting setup in JDE](#)
3. [ABC Inventory Stratification Concepts](#)

- [10 Steps to Inventory Record Accuracy - David Buker.PDF](#)
- [Count Frequency selection for cycle counting.pdf](#) 
- [Cycle Counting - the only way and least cost way.pdf](#) 
- [Cycle counting case histories #1 - Joel Schipper.pdf](#) 
- [Cycle Counting case history #2 - Joel Schipper.pdf](#) 
- [Cycle counting for record accuracy.PDF](#) 
- [Effective cycle counting.PDF](#) 
- [The six keys to cycle counting.pdf](#) 
- [Accountants view of Cycle Counting - JMS talk - slides are u](#)

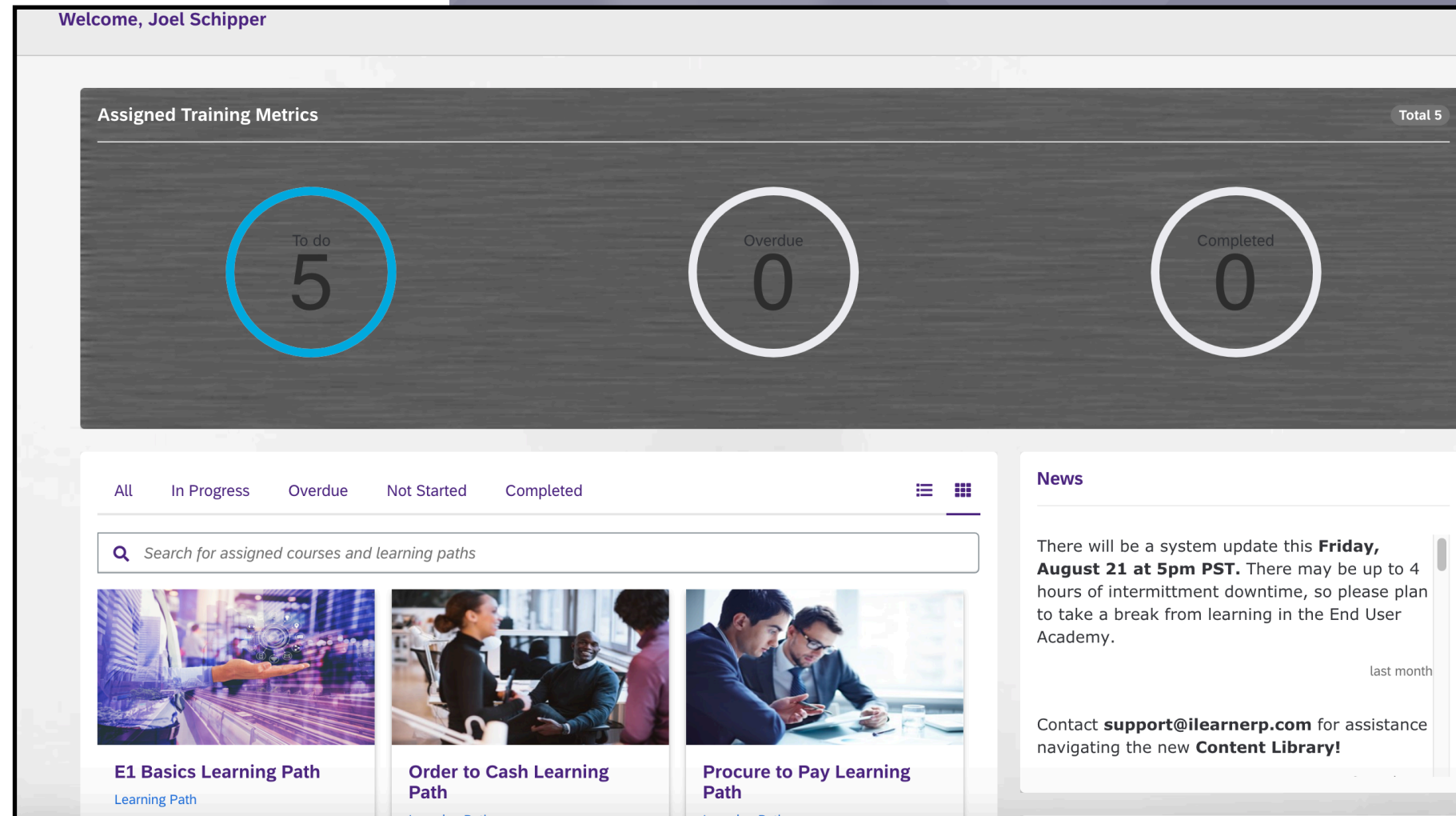
Guided Practice with iLearnERP

- “Student membership” in iLearnERP’s End User Academy
 - Professional materials covering the course subject matter areas
 - Suggested topics to review
- Step-by-step guides for hands-on practice
 - Individual student sign-on to iLearnERP’s up-to-date EnterpriseOne ‘demo’ system
 - All practice data is within the standard “JDE” data base
- Practice key UXOne functions
 - Navigation, Carousel, QBE, Saved Query, Alerts, Composed Pages, etc.
 - Learning paths for Basics, Financials, PTP, Inventory, OTC

iLearnERP End User Academy

My Dashboard

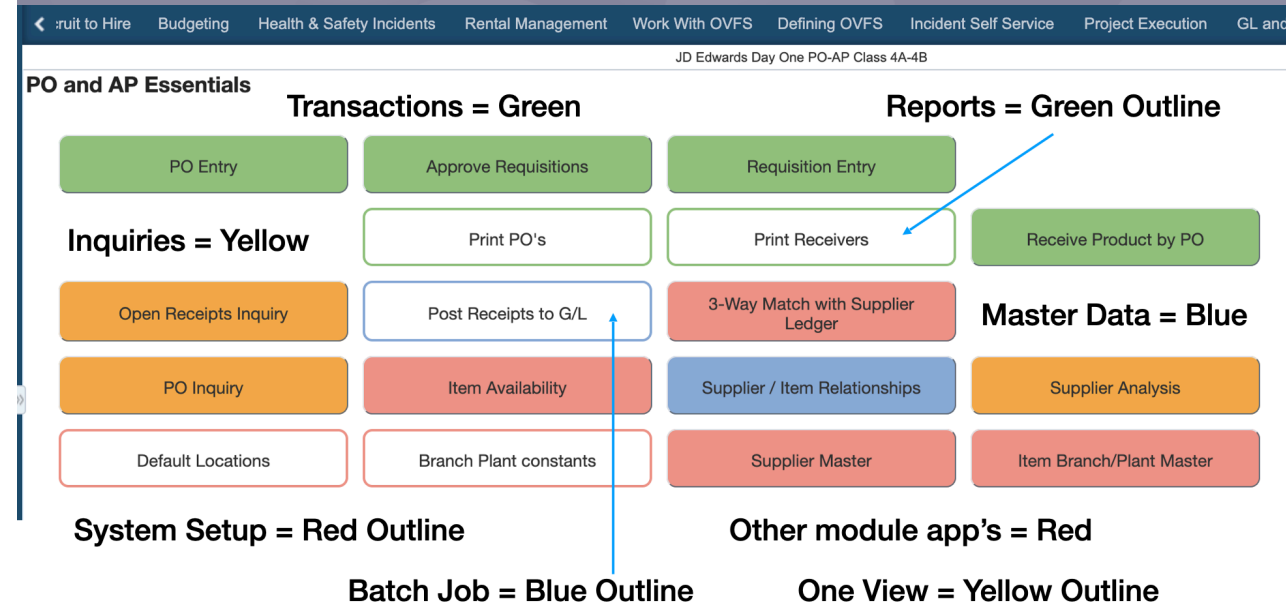
- 5 modules
- Tracks student progress
- Video guides
- Step by step “click” guides
- <https://enduseracademy.litmos.com/home/dashboard>



E1 Pages

- Eases navigation for the “live practice” sessions
- Especially built for GL/JC, Procurement/AP, Inventory, Sales/AR
- Color-coded for master files, transactions, inquiry, reports, etc.
- Supplements other ‘navigation’ methods students will learn
 - Fastpath, Favorites, Menu tasks and breadcrumbs

Color-coded E1 Page



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Panel Question — Why Should a Student Care about JD Edwards Day One?

- **Carl Goossen** — Digital Transformation Leader and CFO of Wichita Furniture & Mattress and Ashley HomeStore
- **Elizabeth Schriefer** — Owner & President of iLearnERP — an ERP training and change organization
- **Roger McHaney** — Professor and sponsor of JD Edwards Day One program at Kansas State University
- **Chris Dennis** — JD Edwards supply chain professional at “New Sabina Industries” and Instructor at Columbus State Community College (CSCC) for JD Edwards Day One
- **Joel Schipper** — Moderator, retired JD Edwards Sales Consulting

- Gain a competitive advantage in finding a job
 - ERP system skills — specifically the ERP's run by the Fortune 1000 — should mean a higher starting salary
 - Easier to pick up a second ERP than to learn one for the first time
 - Knowing the “language” of the business system in a new job eases your transition and lets you contribute sooner
 - You have a better ability to understanding business issues, and fix them on-site or while working remotely
- Easier and earlier success in your 1st job after college leads to more happiness

- It's more than just learning ERP
 - As a student — Understanding the ERP system eco-system may help you better understand other business courses
 - In your new job — Learning the integrated application network of software systems that automate core business processes will aid in critical thinking with many business applications
- You get to appreciate how Digital Transformation is going to effect your next job

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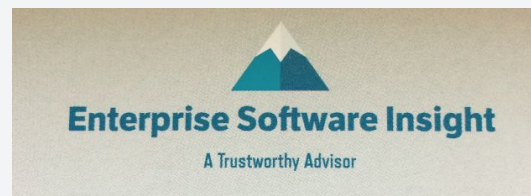
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Panel Question — Why Should a Employer Care about JD Edwards Day One?

- Carl Goossen
- Elizabeth Schriefer
- Roger McHaney
- Chris Dennis
- Joel Schipper



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Panel Recap — page 1 — Why Should an Employer Care about JD Edwards Day One?

- Business success in 2020 and beyond demands the ability to change how revenue creation is executed and delivered
 - Cost of learning from mistakes and missing revenue opportunities is exponentially higher than ever before
 - JD Edwards Day One prepares a young workforce to quickly and correctly access more of the benefits of ERP
 - This helps a company's ability to adjust to radical market shifts

Panel Recap — page 2 — Why Should an Employer Care about JD Edwards Day One?

- At most lean businesses there is little time or resource for on-the-job new hire ERP training
 - JD Edwards Day One gives college graduates a base knowledge and awareness of ERP
 - Your new hires are ready to grow with your business
 - Understanding an integrated ERP system is a significant jump start to organization, job-role specific learning
 - New employees with ERP skills are less costly to train
- Young employees are not receiving integrated, systems learning in other curriculums
 - This hands-on approach provides both core knowledge and practical experience with a long-standing ERP system
 - Not running JDE? It's easier to pick up a second ERP than to learn the first time

Our Objectives Today

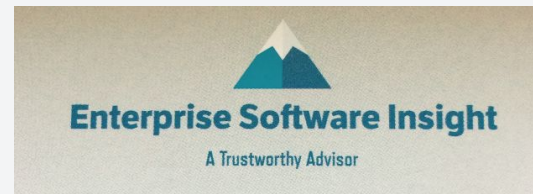
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Panel Question — Why Should a Student Care about JD Edwards Day One?

- Roger McHaney
- Chris Dennis
- Carl Goossen
- Elizabeth Schriefer
- Joel Schipper



Panel Recap — How can JD Edwards Day One help you?

- Start the conversation with your local community college or university
 - KSU has a “distance learning” program
 - KSU is open to sharing the materials to schools who have a JDE-knowledgable instructor
- Help sponsor a local JD Edwards Day One program
 - Help with student tuition and with “text/lab” fees for iLearnERP access
 - Offset costs at your local school or with KSU’s distance learning facility
 - Help with local instructor and preparation costs
- Spread the word through user groups, conferences and online networking
 - Growing talent is possible!

Poll #2

- Are you interested in bringing “JD Edwards Day One” to your community?
 - As a program taught at your local college?
 - If so, do you have a JDE-savvy instructor?
 - As a distance learning program through Kansas State?
- Or not interested, at least at this time

JD Edwards Day One

An Introduction to ERP

College Level Education

Students learn the history and purpose of ERP, the UX-One user interface for JD Edwards, and use the normal training “company” to experience and practice typical ERP functions using EnterpriseOne. They finish with an overview of security issues, and a glimpse into how ERP supports “digital transformation.”

- All lectures are pre-recorded with extensive supporting materials and on-line quizzes
- Facilitator can conduct weekly coaching calls
- Student membership in iLearnERP’s “End User Academy” for related learning paths
- Live practice sessions on iLearnERP’s “demo” system with detail, self-guided instructions tied to course module and quiz questions

Experience this 15-lesson introduction to modern ERP systems using Oracle’s JD Edwards EnterpriseOne as a live, working example.

Offered through Kansas State University’s College of Business Administration — distance learning via scheduled course catalog offering, or through a custom group learning certificate session.

Material also available at “no-cost” to Higher Ed organizations with “JDE - knowledgeable” facilitators.

Begin your discussion today with:

Joel Schipper - joel.m.schipper@gmail.com

Dr. Roger McHaney - mchaney@ksu.edu

Elizabeth Schriefer - elizabeth@ilearnerp.com

Curriculum

1A – Introduction to ERP
1B – EnterpriseOne Foundation
2A – Address Book
2B – UX One
3A – General Ledger (GL)
3B – Project (aka Job) Costing (JC)
4A – Procurement (Purchasing)
4B – Accounts Payable (AP)
5A – Inventory Management
5B – Inventory Accuracy
6A – Sales Order Management
6B – Accounts Receivable (AR)
7A – Financial Statements
7B – JD Edwards Security
7C – Introduction to Digital Transformation and ERP



Re-developed to KSU distance standards in 2019



Currently taught at KSU and Columbus State CC



Single/Double Semester and intensive formats



All course material in Canvas and media files

Overview flier posted on Joel’s LinkedIn page

Please share with all who might be interested

JD Edwards INFOCUS

Q&A

Contact me:

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mchaney@ksu.edu

cdennis13@csc.edu

elizabeth@ilearnerp.com

Session ID:

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Quest
JD Edwards
Community

And Shout-out's — to others who helped

- Ben Ward of KSU for his expert guidance in the redevelopment of the class to meet KSU standards under our grant
- Heather Phillips of Little Rapids for her review of ALL the quiz questions!
- Sherri Conrady of ALLOut Security for her guest lectures.
- Tricia Cornish for her help in organizing Procurement, Inventory, and Sales Order data and flows
- Dave Geoffrion for his help in dealing with Object Management and P98220 to get the E1 Pages published
- Mike Norris for his color commentaries on financials during the original class
- Paul Cudmore for the original JDE101 Procurement-Inventory-Sales questions
- Andy Klee for his generosity in releasing those questions to us
- Nag Karaka of PCB Apps for his support of the original KSU class
- The bike shop in Manhattan KS that lent Carl Goossen a Trek bicycle so we could physically scan bar code tags attached to the bike and bring up “JDE part numbers” in the original class

At Quest, you belong.

Swap stories, ask questions, find answers, and learn from other Oracle users.

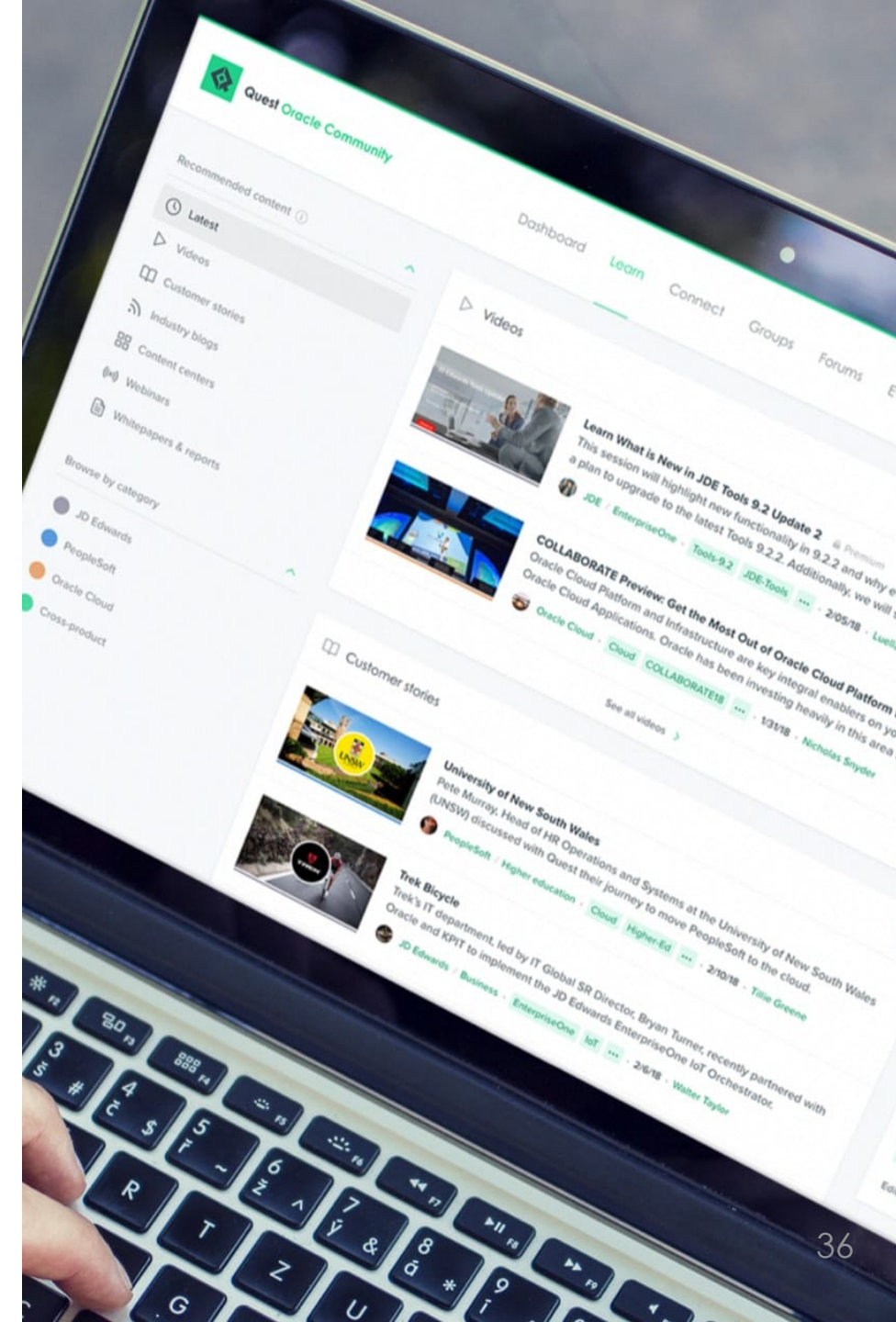
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- Find answers and solve problems.
- Make better, informed decisions.
- Increase their sphere of professional influence and advance their careers.

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- Transform their organizations and modernize their product planning.
- Recognize opportunities for efficiency gains and cost savings.

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