JD Edwards

INFOCUS

JD Edwards Day One —
College-level Introduction to ERP

Presented by:

Joel Schipper and Elizabeth Schriefer

iLearnERP

Session ID

100200

Our Objectives Today

1. Gain a bird's eye view of what's in JD Edwards Day One

2. See how to reduce the stress of building a "JDE" team with new talent

3. What we've learned — and How your college can get access to this course

Agenda

Topic	minutes
Introductions	5
What is JD Edwards Day One?	15
Discussion Topics	
- Why should a student care?	10
- Why should an employer care?	10
- How this program can help you	5
Q&A	5
	50

Presenter — 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
- Passionate about "paying it forward"
- Envisioned an opportunity to introduce college students to ERP
  - Co-founded "JDE101" — a first step
  - Re-envisioned as "JD Edwards Day One - an Introduction to ERP"
    - Designed for college students at Kansas State University (KSU)
- Found a lot of student interest in "What is ERP?"

Co-Presenter — 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

Poll #1

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

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Course Flow — 15 lessons covering ...

- History of ERP
- Foundations of Agility in EnterpriseOne, and the Address Book
- How to use the Grid, Versions, Processing Options, and G/L basics
- Appreciating the UX One interface
- Students follow a "distribution" company
    - Purchase Inventory — Look at Inventory — Sell Inventory
    - Account and report with GL, AP, Cycle Counting, AR, JC, and Financial Reporting
    - Data is the "familiar" JD Edwards "Company 0001"
        - bicycle parts, addresses 4242, 4343, branches D10, D30, etc.
- An overview of JD Edwards Security
- An Introduction to Digital Transformation

Course and Lesson Structure

- 15 lesson program supports a semester or a full year
  - Student time runs from 6 to 10+ hours per weekly lesson
- All materials are stored on-line
  - Pre-recorded lectures on
  - Extensive written lecture notes and practice guides
  - Illustrative "PowerPoints" — some with recorded walk-throughs
  - Extensive, optional "additional materials" e.g., articles and web links
- iLearnERP End User Academy gives access to professional learning paths and materials
- Scripted hands-on practice or "lab work" with iLearnERP's demo system
  - Many are supported with recorded video demonstrations
- On-line QUIZ for each lesson
- Term paper on an ERP topic chosen by the student
- Final "essay" exam around ERP "agility" and ability to support growing/changing businesses
- Optional weekly Zoom 'coaching call' for open Q&A … and side discussions

Typical Lesson Outline

- Video intro
- Recorded Lecture
- PowerPoints and video walkthroughs
- Detailed lesson notes
- Optional extra materials, PDF's, web links
- Guest lectures in many lessons
- Optional Pre-recorded UPK segments
- Suggested use of iLearnERP's End User Academy content
- Guided hands-on live system practice notes
- Multiple choice / T-F QUIZ

JD Edwards INFOCUS 2022

Welcome Message

More about your Teachers (and How to Reach Us)

Global Campus Resources for Students

Course Overview Material

Coaching Session Recordings and Summaries

1A - Introduction to ERP

1B - EnterpriseOne Foundation

2A - Address Book

2B - UX One

Student Term Paper Proposal

4A - Procurement (Purchasing)

5A - Inventory Management

6A - Sales Order Management

3A - General Ledger (GL)

4B - Accounts Payable (AP)

5B - Inventory Accuracy

6B - Accounts Receivable (AR)

3B - Project (aka Job) Costing (JC)

7A - Financial Statements

7B - JD Edwards Security

Course Survey

7C - Introduction to Digital Transformation and ERP

Term Paper Due

Final Exam - Opens Saturday December 10, 2022

Course Readings

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

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.

Quizes

- 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
  - Focus is away from narrow "JDE-specific" questions and instead to broader ERP concepts
  - No 'trick' or ambiguous questions
  - Reviewed by a JDE end user

JD Edwards INFOCUS 2022

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

Special Bonus

- Lesson 5B - Inventory Accuracy
- "Everything" a student needs to
  - Diagnose an existing inventory 'accuracy' program
  - Establish a cycle counting program with any ERP
  - Time-tested industry materials
  - Specific guidance to 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 learning paths for Basics, Financials, PTP, Inventory, OTC
  - Class materials suggest which specific lessons to use
- 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.
  - E1 Pages built specifically for this class

iLearnERP End User Academy

My Dashboard

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

Welcome, Joel Schipper

Assigned Training Metrics   Total 5

To do
5

Overdue
0

Completed
0

All   In Progress   Overdue   Not Started   Completed

🔍 Search for assigned courses and learning paths

E1 Basics Learning Path
Learning Path

Order to Cash Learning Path

Procure to Pay Learning Path

News

There will be a system update this **Friday, August 21 at 5pm PST.** There may be up to 4 hours of intermittent downtime, so please plan to take a break from learning in the End User Academy.

last month

Contact **support@ilearnerp.com** for assistance navigating the new **Content Library!**

E1 Pages

- Supports navigation for the "live practice" sessions
- Especially built for GL/JC, Procurement/AP, Inventory, Sales/AR, and other "Favorites"
- 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

Sample Term Paper Topics

- Compare development of ERP's from different vendors
- Look into a specific implementation, such as a public sector consolidation and upgrade
- Review use of ERP in an industry such as Healthcare or Automotive
- Compare ERP to purpose-built enterprise systems
- Review ERP trends and needs in developing countries
- Consider unusual situations such as off-the-books labor markets
- Highlight how ERP feeds into data analysis

What Students Have to Say

- This course broadened my knowledge of ERP systems, and will let me better utilize ERP as a tool in my professional work.

- I will be working at a large firm as a technology consultant. In my interview, I mentioned our class and it drew a lot of attention, creating an opportunity for me to talk about the term paper I wrote on ERP in developing countries. Future students should highlight this course and their term paper topic on their resumes.

- I really enjoyed learning about ERP systems such as Oracle's JD Edwards EnterpriseOne.

- The iLearnERP segments and the live system practice really helped me to learn.

- The class is well organized, and the amount of detail and supporting information will really help students go through this course as a distance learning offering.

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Guest Video — Roger McHaney

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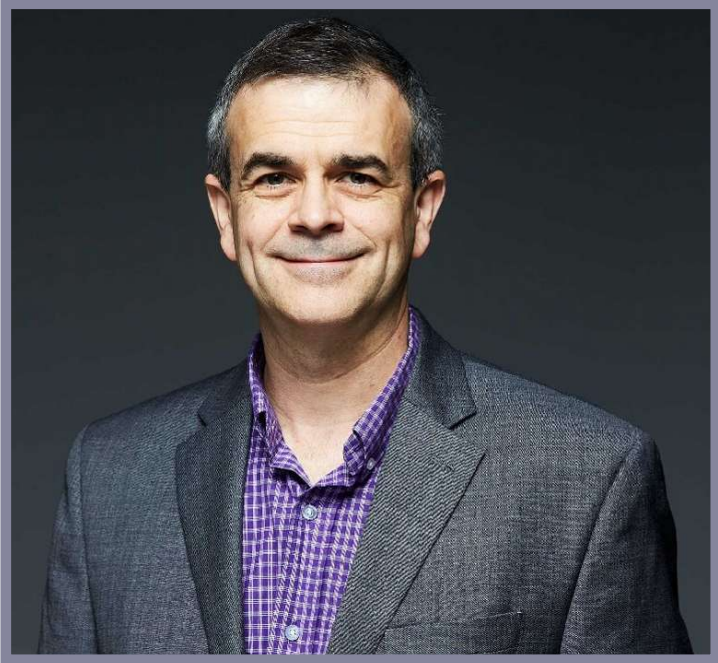
- Professor and University Distinguished Teaching Scholar
  - Management Information Systems
  - Kansas State University
  - Daniel D. Burke Chair for Exceptional Faculty
- Focus on Cloud Computing and Business Computing Use
- Sponsor of JD Edwards Day One program at KSU
- Passionate about Preparing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

KANSAS STATE
College of Business

Why Should a Student Care about JD Edwards Day One?

- To gain a competitive advantage in finding a job
  - Acquiring ERP system skills — specifically the ERP's run by the Fortune 1000 — should mean a higher starting salary
  - Discussing this class has led to successful job interviews
  - 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
  - A better ability to understand business issues, and fix them on-site or while working remotely
  - Easier and earlier success in the 1st job after college —> more happiness

(More) Why Should a _Student_ Care about JD Edwards Day One?

- It's more than just learning ERP
  - Understanding the ERP system eco-system may help you better understand other business courses
  - Learning the integrated application network of software systems that automate core business processes will aid in critical thinking with many business applications
  - Be ready to embrace Digital Transformation in the workplace

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Video Guest — Carl Goossen

Listen to Carl

- CFO Financial Strategist — Advising privately held companies
- Past CFO of Wichita Furniture & Mattress and Ashley HomeStore locations in Wichita, Kansas driving digital transformation
- Past Controller and CFO of Spray Equipment, a JD Edwards customer for 18 years
- Architects business data for optimal insight to action — while minimizing hybrid processes
- Passionate about ERP-readiness of college graduates
  - Connected the vocational skill development concepts of "JD Edwards Day One" to the goals of KSU's School of Business to provide graduates with skills to attack real world challenges.
  - Executive-in-Residence for initial course development and delivery

Why Should an Employer Care about JD Edwards Day One?

- Business success today 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
  - Better understanding of ERP helps a company adjust faster to radical market shifts

(More) Why Should an <u>Employer</u> Care about JD Edwards Day One?

- Little time or resources for on-the-job new hire ERP training in lean businesses
  - JD Edwards Day One provides 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 learning a job-specific role
    - New employees with ERP skills are less costly to train
- Young employees are not receiving integrated, systems learning in other curriculums
  - This class provides both core knowledge and hands-on practical experience
    - Not running JDE? It's easier to pick up a second ERP than to learn the first one

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Poll #2

- Are you interested in bringing "JD Edwards Day One" to a college or university of your choice?
- If yes, do you have an ERP and/or JDE-savvy instructor available?
- If not interested today, would you be interested in the future?
- Are you connected with a government sponsored jobs training program that might utilize this course?

How can you get a "JD Edwards Day One" happening in your community?

- Start the conversation with your local community college or university
    - KSU has a "distance learning" program
    - KSU is open to offering a credit or non-credit semester to schools who have an ERP and/or JDE-savvy facilitator/instructor
- Help sponsor that local JD Edwards Day One program
    - Offer financial aid for student tuition and the iLearnERP "text/lab" fee
    - Help by providing a local facilitator/instructor
- It is *possible* that a government sponsored jobs training program could utilize this course
- Spread the word through user groups, conferences and online networking that growing talent is possible!
    - https://www.ilearnerp.com/jdedwards_day_one/

JD Edwards Day One

We support the students and instructors of this 15- lesson College Level introduction to modern ERP systems using Oracle's JD Edwards EnterpriseOne as a live, working example with access to our End User Academy, resources and JD Edwards environment.

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.

JD EDWARDS DAY ONE FLYER AND CURRICULUM

Class Offerings

The college level course was developed at Kansas State University (KSU) College of Business. There are options for attending class at KSU and at other schools in coordination with KSU.

WHAT IS JD EDWARDS DAY ONE?

Build Your JDE Team

Learn more about what's in "JD Edwards Day One," how you can reduce the stress of building your "JDE" team when making new hires, and how your college may get access to this course.

JD EDWARDS DAY ONE INFOCUS PRESENTATION

Walk Through a Sample Lesson

Learn more about the content, materials, and online platform for JD Edwards Day One. Students will gain knowledge of a key business tool in many workplaces, regardless of the specific ERP system.

WATCH THE VIDEO

CONTACT US FOR MORE INFORMATION

iLearnERP

https://www.ilearnerp.com/jdedwards_day_one/

Find out More!

Overview flier posted on Joel's LinkedIn page

Please share with all who might be interested

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Session ID:

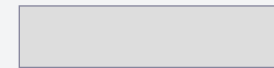100200

Extra — Next Slide

Quest
JD Edwards Community

JD Edwards Day One - A brief history

- Carl Goossen heard of JDE101 as a way to introduce college students to ERP
  - Connected Joel to Roger to discuss "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 and be a 15-week, 3-credit course
  - All course materials are stored on-line and delivered through "Campus" in an asynchronous distance learning mode
  - A hybrid feature is a optional, live weekly Q&A and/or coaching call over Zoom
  - iLearnERP provides a student membership for relevant materials in their End User Academy
    - That membership includes access to live, current release EnterpriseOne system, with practice guided by class materials
  - Approximately 20 (mostly) graduate students have taken the 3-credit class at KSU since 2020
    - Students are often completing their Masters of Data Analytics
    - Students often have some ERP exposure, but only a limited slice, e.g., Hyperion or a bit of eBusiness Suite
    - Some "students" are full-time career workers with limited ERP exposure, e.g., PeopleSoft
    - All want to know "What is ERP?"
- Chris Dennis, a former JD Edwards end user, has facilitated a copy of the course at Columbus State CC beginning in 2020. He made it a required course for the Associate Logistics and Engineering Technology (L.E.T.) degree.

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

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