



JD Edwards

INFOCUS

DIVE DEEP

Using form extensions to turbocharge JDE 9.2

Presented by:

Mohammad Shujaat, Grant Thornton
LLP

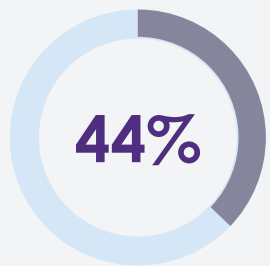
Session ID

101000

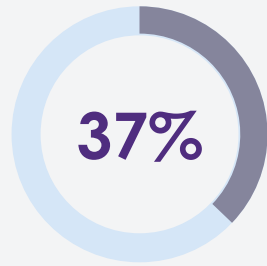
About Grant Thornton

Thriving since 1924, our U.S. firm is people-focused and purpose-driven. We believe business should be more personal and that the strongest results start with trust.

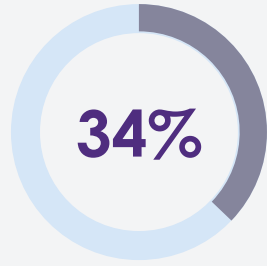
Who we serve:



Fortune 100
companies



Fortune 500
companies



Fortune 1000
companies

* Statistics as of July 31, 2020



\$1.92bn

in revenue



8,459

people, including
595 partners



53

offices

Our Oracle Practice



ERP and SCM

Financials | Revenue management | Accounting hub | Project accounting | Risk management | Project execution
Procurement | Inventory management | Cost management | Maintenance | Manufacturing | Order management | Product lifecycle and data management | Supply chain collaboration and planning



EPM Analytics

Planning and budgeting | Profitability and cost management | Financial close and consolidation | Tax reporting and provisioning
Management and operational analytics | Narrative reporting | Account reconciliation | Enterprise data management



HCM

Culture journey | Talent acquisition | Workforce administration | Talent management | Workforce development
Alumni network

Data governance & cloud integration

PaaS

Solution delivery center (off-shore and on-shore)

Industries

Construction,
Real Estate
& Hospitality

Consumer
And Industrial
Products

Energy

Financial
Services

Healthcare
And Life
Sciences

Not-For-Profit
Organizations

Private Equity

Public Sector

Technology

Find your silver lining
gt.com/silverlining

Oracle Partner Excellence Awards



Grant Thornton is the proud recipient of the Oracle JD Edwards 2020 Partner Excellence Awards in three categories: Application Optimization, Process Automation, and Building a Cloud Culture.



The awards recognize Grant Thornton's ability to combine business strategy with JD Edwards' functional and technical capabilities to deliver value.



The 2020 Partner Excellence Awards are the latest in a long line of accolades Grant Thornton has received over decades of collaborating with JD Edwards.

About Grant Thornton JDE

JD Edwards practice – 80+ dedicated professionals in U.S.

Project management and functional expertise

- Specialized functional resources
- Project management office
- Implementations
- Upgrades
- Mobile applications
- Third party integration architecture
- Business process re-engineering
- Managed services (functional)
- User materials and training
- Financials
- Distribution
- Manufacturing
- HR / Payroll
- CAM
- Project advisory

Technical

- CNC
- Development
- Workflow
- Security management
- Technical management
- Database management
- Infrastructure / hosting
- Managed services (technical)
- Private cloud
- Disaster recovery
- Security
- Development (FRICE)

Trusted business advisor

- Gap assessment
- Transformation
- Industry point of view
- Proven methodologies
- Process excellence
- Benchmarking
- ERP governance
- Data governance
- Master data management
- Reporting strategy
- Change management
- Cloud roadmap / strategy
- FASB planning
- Chart of accounts optimization



Oracle leadership

- The Leading Oracle Platinum Partner presenter at COLLABORATE, INFOCUS and OpenWorld conferences (more presentations than any other Platinum partner in the past 3 years)
- Featured in PROFIT magazine – JD Edwards Special Issue
- Teaming with JDE product development – we work with JD Edwards on enhancing the code base for customers (e.g. OneView Reporting, Revenue Recognition, Leasing Standards, Configurator)



Experience and recognition

- More than 250 JD Edwards implementations and upgrades as a practice
- Over 20 implementations in the past 5 years
- Over 50 upgrades in the past 5 years
- 2017 JD Edwards Partner Excellence Award for **User Adoption**
- 2016 JD Edwards Partner Excellence Award for **Vertical Industries**
- Oracle JD Edwards recognized Grant Thornton with its 2014 and 2015 JD Edwards Partner Excellence Award for Outstanding **Upgrades**

About Me



- Mo is a manager with Grant Thornton in the Technology Solutions practice. He has over 7 years of consulting experience, across a diverse set of companies and industries. Mo's experiences include hands on management and implementation of ERP software packages, business process reengineering and system architecture design. Mo is passionate about using JDE usability tools and orchestrations to provide customers with creative and unique solutions which help progress them on their digital journey. Mo is also experienced in blockchain solutions and has implemented machine learning solutions with JDE
- He has experience with the processes and configuration of the JDE Distribution and Manufacturing modules, specifically with the, Procurement, Sales, Inventory, Advanced Pricing, Shipping, Discrete Mfg, MTO Mfg, and Transportation. Mo also has experience with multiple releases of the software, web services, and warehouse data collection. Prior to joining Grant Thornton Consulting, Mo was an experienced consultant at an Oracle Partner

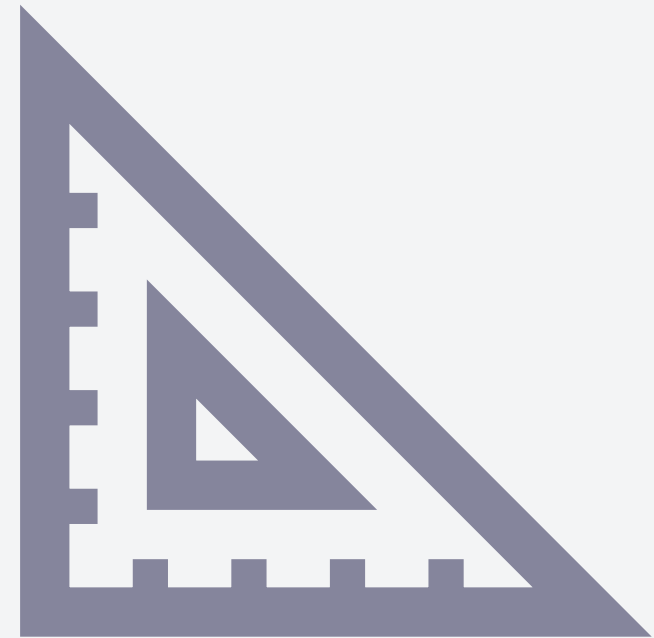
Industries

- | | | |
|--------------------------------|---------------------------|-------------------------------------|
| • Consumer Products | • Construction & Building | • Data Collection |
| • Retail | • Materials | • Third Party Logistics |
| • Metals and Mining | • Automotive Parts | • Inbound / Outbound Transportation |
| • Mineral Exploration Drilling | • Manufacturing | • Machine learning |
| • REST integrations | • Metals Components | • Blockchain |

Agenda

- What are Form Extensions?
- Form Extensions vs Form Personalization
- FDA Lite
- Would you like an easy button for that?
- Orchestrations
- Use Cases

What are Form Extensions?



Form Extensions

User Defined
Objects

Can be
created on
most types of
forms*

Are limited to
1 form
extension per
form

Managed like
any other
UDO
(P98220U)

Promoted via
WebOMW
projects
(P98220W)

Used in
conjunction with
other UDOs

Form Extension <> Form Personalization

People often get confused between these two UDO's

They are similar but not the same

Serve two very different purposes

Form Personalization sits on top of form extensions

Form Extensions Capabilities



Look & Feel

Change how an E1 application form looks & feels



Form Behavior

Change how an E1 form behaves such as tab sequence, required fields, or filter criteria



Add Fields

Add fields from table or business view for viewing, adding*, or updating data



Manage Exits

Add personalized form or row exits to related applications



Add Buttons

Add buttons which can be associated which can be used to call orchestrations



Call Orchestration

Associate orchestrations with form events & map outputs back to form

Form Extensions vs Form Personalization



Form Extensions vs Form Personalizations



Not mutually exclusive:
Used in conjunction with
each other



Form Extensions affect form
personalizations but not the
other way around



Form Extensions: Applied
at the Application form
level (Ex. P4210_W4210C)



Form Personalization: Applied at
the Application, form, version,
user/role level
(Ex. P4210_W4210C_ZJDE0001 for
a specific role)

Form Extensions vs Form Personalizations

Capabilities	Form Design Aid	Form Extension	Form Personalization
Adding Event Rules to E1 Forms	✓	✗	✗
Adding buttons on a form	✓	✓	✗
Changing filter criteria	✓	✓	✗
Changing field labels, sizes, and making fields required	✓	✓	✓
Changing tab sequence	✓	✓	✓
Associating Orchestrations to form events	✓	✓	✗
Adding hidden columns to grid or form	✓	✓	✗
Adding Form exits & Row exits to applications	✓	✓	✗
Adding Form exits & Row exits to UBE's	✓	✗	✗

When To Use Personalization vs Extension

Capabilities	Form Extension	Form Personalization
Does the form change need to apply to all versions?	✓	✗
Do I need the form change to apply to all users/roles?	✓	✗
Is the form change for a particular role?	✗	✓
Do I need to associate a grid for this form change?	✗	✓
Do I need to add a new row or form exit?	✓	✗
Do I need to hide an existing form or row exit?	✗	✓
Do I need to rename an existing form or row exit?	✗	✓

FDA Lite



Form Extensions – Form Design Capabilities



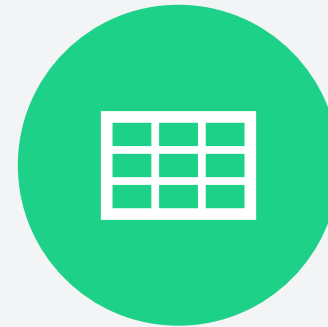
Add hidden fields from the business view or table used by the application to either the form or the grid



Hide fields that are on the application form only (not for the grid, for that we use a grid format)



Move fields from their original location to anywhere else on the form



Resize form itself, the entire grid, or field sizes & their labels

Form Extensions – Form Design Capabilities



Edit tab sequence of form: This is the sleeper pick of all these features!



Change filter criteria for exposed fields



Mark fields as required for all versions



Display associated descriptions for fields where description is hidden

Form Extensions – Form Design Capabilities



Add Form exits & Row exits to applications: Can open forms in different modes & pass in data to interconnect



Change filter criteria for exposed fields or set it as a wild card display



Mark fields as required for all versions



Decide if exposed field is displayed on both add mode or only update mode, or if it's displayed at all

Form Extensions – Form Design Capabilities



Reset if you made a mistake!

Form Extensions – Hiding & Unhiding & Repositioning Controls

- The video below will demonstrate how to Hide, Unhide, and reposition Controls on a form extension

The screenshot displays the 'Work With Order Headers' form and the 'Form Extension Manager' panel. The form has a header section with input fields for 'Order Number', 'Supplier', and 'Business Unit'. Below this is a table with the message 'No records found.' and a table with columns: Order Number, Or Ty, Order Co, Supplier Number, and Supplier Description. The 'Form Extension Manager' panel on the right shows the 'Name' as 'P4310_W4310I', 'Edit Tab Sequence' as an unchecked checkbox, and 'Associate Orchestrations' as a link. It includes 'Add Button' and 'Manage Exits' buttons. The 'Available Business View Columns' section shows 'Work With Order Headers' selected, with 'Form' selected over 'Grid'. A 'Column Search' field is present. A list of columns with green plus icons for addition is shown:

Desc	DD Item
Date - Actual Ship Date [F4301.ADDJ]	+
Buyer Number [F4301.ANBY]	+
Carrier Number [F4301.ANCR]	+
Code - Approval Routing [F4301.ARTG]	+
Price and Adjustment Schedule [F4301.ASN]	+

Form Extensions – Modifying Labels

- The video below will demonstrate how to modify labels on a form extension

The screenshot displays a 'Sales Order Header' form with several tabs: 'Sales Order Header', 'Additional Header Information', 'Customer Set', 'Global Order Promising Overrides', and 'Style'. The 'Sales Order Header' tab is active, showing fields for 'Order Number', 'Revision Number', 'Previous Order', 'Attachments', 'Branch/Plant', and a 'Foreign' checkbox. Below these are two main sections: 'Address Numbers' and 'Dates'. The 'Address Numbers' section includes 'Sold To', 'Ship To', 'Use Taxed Prices', 'Customer PO', 'Print Message', 'Hold Code', 'Tax Area/Code', and 'Tax Certificate No.'. The 'Dates' section includes 'Order Date', 'Cancel Date', 'Requested Date', 'Requested Time', 'Price Pickslip', 'Invoice Copies', 'Ordered By', and 'Taken By'. Each field has a small red square icon next to it, likely indicating a point of modification or extension.

Form Extensions – Add Form/Row Exit

- The video below will demonstrate how to add a form or row exit on a form extension

The image shows two screenshots from a software application. The left screenshot displays the 'Work With Order Headers' form, which includes input fields for 'Order Number', 'Supplier', and 'Business Unit', and a table with columns 'Order Number', 'Or Ty', 'Order Co', 'Supplier Number', and 'Supplier Description'. The right screenshot shows the 'Form Extension Manager' dialog, which is used to configure form extensions. It includes fields for 'Name' (P4310_W4310I), 'Edit Tab Sequence', and 'Associate Orchestrations'. The 'Available Business View Columns' section is expanded, showing a list of columns with their descriptions and a green plus icon next to each, indicating they can be added to the form extension.

Work With Order Headers

Order Number * * * * Business Unit *
Supplier

No records found.

Order Number	Or Ty	Order Co	Supplier Number	Supplier Description
--------------	-------	----------	-----------------	----------------------

Form Extension Manager

Name: P4310_W4310I
Edit Tab Sequence: ☐
Associate Orchestrations: [Associate Orchestrations](#)
Add Button: Manage Exits:

Available Business View Columns **Extension Only**

Select Business View: Work With Order Headers

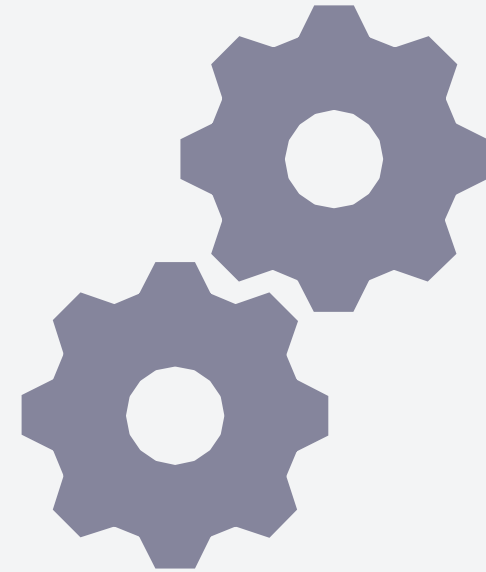
Work With Order Headers [V43101A]
☒ Form ☐ Grid

Column Search

Desc | **DD Item**

Date - Actual Ship Date [F4301.ADDJ]	<input type="button" value="+"/>
Buyer Number [F4301.ANBY]	<input type="button" value="+"/>
Carrier Number [F4301.ANCR]	<input type="button" value="+"/>
Code - Approval Routing [F4301.ARTG]	<input type="button" value="+"/>
Price and Adjustment Schedule [F4301.ASN]	<input type="button" value="+"/>
Associated Text [F4301.ATXT]	<input type="button" value="+"/>

Orchestrations



Call Orchestrations from form events



Sprinkle a little orchestration into that

Add orchestrations to any event on a form:

1. When users click a button
2. When they exit a control
3. When they submit a transaction



The possibilities are endless!

Have the orchestration kick off processes, send notifications, validate data

1. Kick off UBE's after users are done submitting data
2. Automate related transactions
3. Validate Data
4. Send a notification
5. All the above!



Make It Interactive

Have the orchestration return data back to the form and update form controls

1. Update values in the grid row
2. Bring back values & update them in the form header
3. Do some groovy math and return it back to your user

Form Extensions – Associating Orchestrations



Can pass form or grid values into orchestration as orchestration inputs



Can choose to run the orchestration synchronously or asynchronously



Can ignore warnings, display progress bars, and choose execution options



Can return orchestration outputs back into the form

Form Extensions – Associating Orchestrations

- The video below will demonstrate how to associate orchestrations with a control on a form:

The screenshot displays the 'Work with Return Material Authorization' form and the 'Form Extension Manager' dialog.

Form Interface:

- General Tab:** Contains fields for RMA, Customer, Branch/Plant, Work Order, and Request Number. It also includes buttons for 'CCS Approval', 'ACC Approval', and 'Print RMA'.
- Table:** A table with columns: RMA No, RMA Type, RMA Co, RMA Line, Documents Created for RMA, and Last Disposition. The message 'No records found.' is displayed above the table.

Form Extension Manager Dialog:

- Name:** P40051_W40051A
- Edit Tab Sequence:** ☐
- Associate Orchestrations:** [Associate Orchestrations](#)
- Add Button:**
- Manage Exits:**
- Available Business View Columns:** Select Business View: Work with Return Material
- Work with Return Material Authorization [V40051A]:** ☒ Form ☐ Grid
- Column Search:**
- Desc | DD Item:**
- Columns:**

Parent Number [F40051.AAID]	<input type="button" value="+"/>
Date - Effective [F40051.ABCX]	<input type="button" value="+"/>
Amount - Extended Price [F40051.AEXP]	<input type="button" value="+"/>
Phone Prefix [F40051.AR1]	<input type="button" value="+"/>
Component 2nd Item Number [F40051.CPIL]	<input type="button" value="+"/>
Created by user [F40051.CRTU]	<input type="button" value="+"/>

I've Been Told I Have a Problem...



Would You Like an
Easy Button for
That?



Adding Buttons is Easy as 1, 2, 3

01

Add the button via a form extension

- Drag the button from the form extension manager and place it on the form

02

Rename the button

- Change the name from button to something relevant

03

Make it do something!

- Associate some logic such as orchestration or notification with the button

Form Extensions – Adding Buttons

- The video below will demonstrate how to add buttons on a form:

The screenshot displays the 'Work with Return Material Authorization' form and the 'Form Extension Manager' dialog.

Form Fields:

- General Tab:** RMA (required), Customer (required), CCS Approval (button), ACC Approval (button), Print RMA (button).
- Shipment Tab:** Branch/Plant (required), Work Order (required), Request Number (required).

Table:

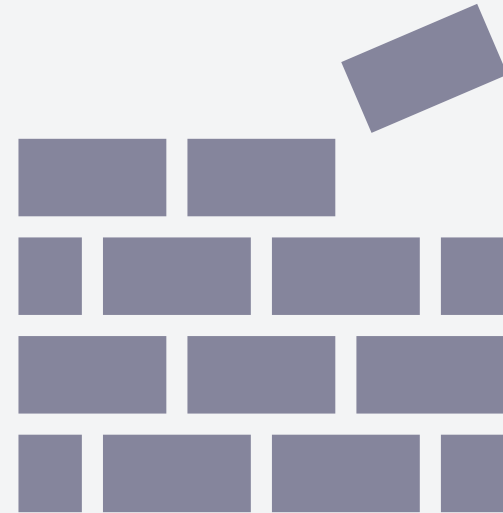
No records found.

RMA No	RMA Type	RMA Co	RMA Line	Documents Created for RMA	Last Disposition
--------	----------	--------	----------	---------------------------	------------------

Form Extension Manager:

- Name:** P40051_W40051A
- Edit Tab Sequence:** ☐
- Associate Orchestrations:** [Associate Orchestrations](#)
- Buttons:** Add Button (+), Manage Exits
- Available Business View Columns:** Select Business View: Work with Return Material
- Form/Grid:** ☒ Form, ☐ Grid
- Column Search:**
- Desc | DD Item:**
- Columns:** Parent Number [F40051.AAID], Date - Effective [F40051.ABCX], Amount - Extended Price [F40051.AEXP], Phone Prefix [F40051.AR1], Component 2nd Item Number [F40051.CPIL], Created by user [F40051.CRTU]. Each column has a green plus button (+).

Use Cases





Automate Manual Steps to Save Clicks

Automate the release of order process/review hold codes using an orchestration

Manage Existing Order

Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Customer Service Inquiry

Order Number: SO

Sold To: *

Ship To: *

Item Number: *

Customer PO: *

Branch/Plant: *

☐ Extend Back Order Quantity

☐ Customer Item

Find Release AC Hold Print Order Conf Credit Check Approve Shipments Online Invoice Order Address Schedule WO Reprint Order Conf Reprint Invoice

No records found.

Order Number	Order Type	Line Number	Hold Code	Sold To	Sold To Name	2nd Item Number	3rd Item Number	Description 1	Quantity	UOM	Unit Price	Extended Amount	Revision Number
--------------	------------	-------------	-----------	---------	--------------	-----------------	-----------------	---------------	----------	-----	------------	-----------------	-----------------



Do Logic & Update Data

Use groovy scripting to do additional logic and update related data

- Update W Line type WO date based on requested date and item availability

Manage Existing Order

Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Customer Service Inquiry

Order Number: * SO * Item Number: Customer PO: Branch/Plant: *
Sold To: *
Ship To: *
☐ Extend Back Order Quantity
☐ Customer Item

Find Release AC Hold Print Order Conf Credit Check Approve Shipments Online Invoice Order Address Schedule WO Reprint Order Conf Reprint Invoice

No records found. CCS_Grid

Order Number	Order Type	Line Number	Hold Code	Sold To	Sold To Name	2nd Item Number	3rd Item Number	Description 1	Quantity	UOM	Unit Price	Extended Amount	Revision Number
--------------	------------	-------------	-----------	---------	--------------	-----------------	-----------------	---------------	----------	-----	------------	-----------------	-----------------



Read My Lips...No More Data Selection!

Use form extensions, buttons and orchestrations to submit UBE's without having the user go to the data selection screen

Manage Existing Order Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

Customer Service Inquiry

Order Number * SO * Item Number * Branch/Plant *
Sold To * Customer PO *
Ship To *

Find Release AC Hold Print Order Conf Credit Check Approve Shipments Online Invoice Order Address Schedule WO Reprint Order Conf Reprint Invoice

No records found.

	Order Number	Order Type	Line Number	Hold Code	Sold To	Sold To Name	2nd Item Number	3rd Item Number	Description 1	Quantity	UOM	Unit Price	Extended Amount	Revision Number
--	--------------	------------	-------------	-----------	---------	--------------	-----------------	-----------------	---------------	----------	-----	------------	-----------------	-----------------

Workflow Use Case

- Used Form Extension on RMA Screen (P40051) & Orchestrations to create workflow for Returns & Credits



Work with Return Material Authorization

Personal Form: (No Personalization) Layout: (No Layout) Query: All Records

✓ 🔍 + 🗑️ ✕ 🔄 Form 📄 Row ⚙️ Tools

General | Shipment | Receipt

RMA: R8 00001 Return Material Authorization Branch/Plant: GR01

Customer: Work Order: *

Request Number: *

CCS Approval Print RMA QC Approval ACC Approval

No records found. CCS

RMA No	RMA Type	RMA Co	RMA Line	Documents Created for RMA	RMA Item Number	RMA Item Description	Lot/Serial Number for Shipment (RMA)	Quantity Shipped
--------	----------	--------	----------	---------------------------	-----------------	----------------------	--------------------------------------	------------------

Additional Use Cases

Additional Use Cases with Form Extensions

Tenant Billback –
Automate creation
of billback entries
based on supplier
voucher

GL Batch Approval

Requisition or
Purchase order
approval

Address Book Master
data workflow

Replace Sales Order
lines with Substitute
items

Import a CSV File &
Create Voucher Z
file entries

Fetch daily
exchange rates into
Z file for review

Q & A



At Quest, you belong.

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

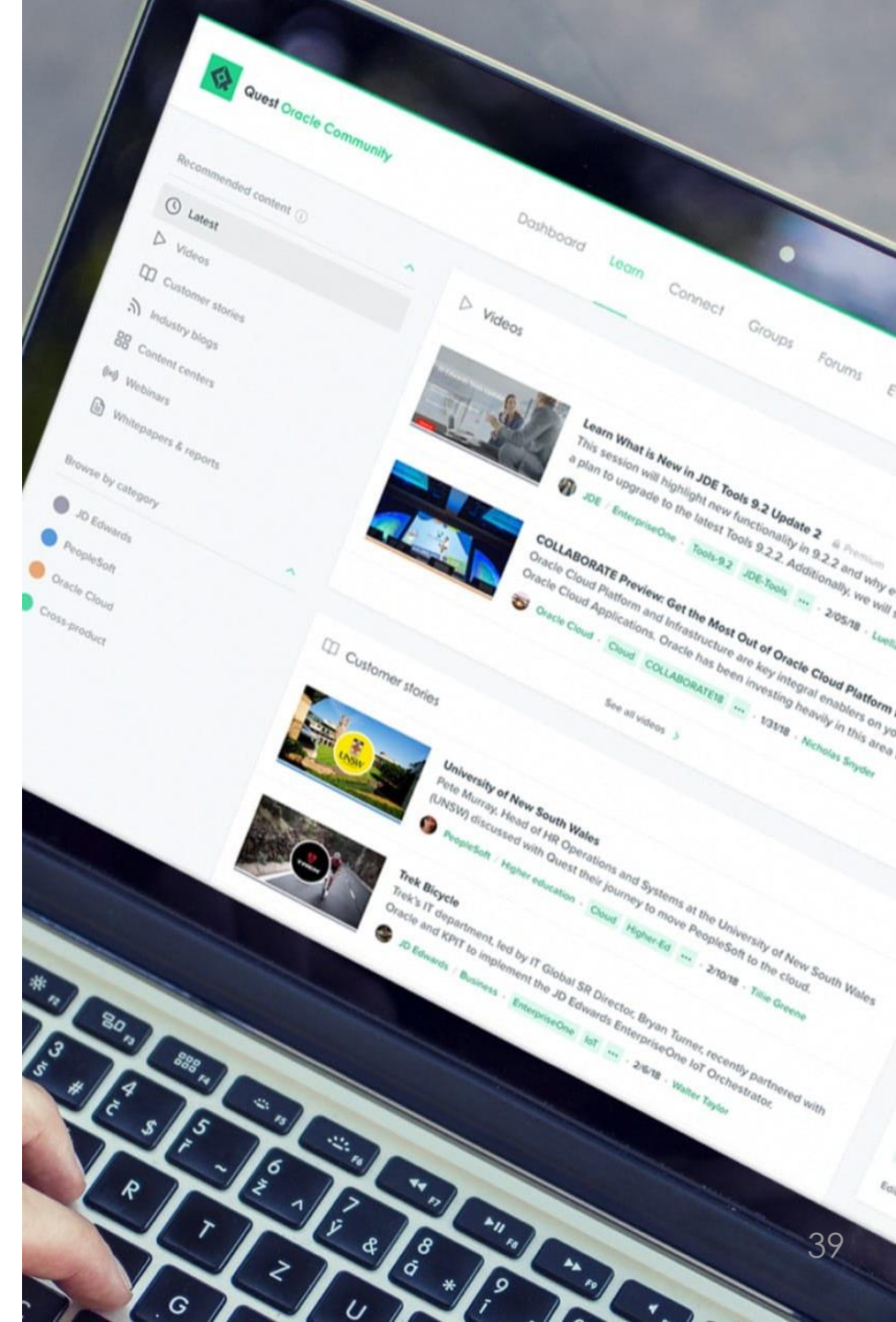
Quest Helps: Individuals

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

Quest Helps: Companies

- Become more efficient in their use and deployment of Oracle products.
- Transform their organizations and modernize their product planning.
- Recognize opportunities for efficiency gains and cost savings.

Learn more at questoraclecommunity.org/membership



JD Edwards

INFOCUS

DIVE DEEP

Contact me:

Mohammad Shujaat

Mohammad.Shujaat@us.gt.com

Session ID:

101000



Quest
JD Edwards
Community