



# WHAT WORKS FOR YOU?

## JD EDWARDS UPGRADE TYPES

With Oracle's Continuous Delivery Model for the latest releases of EnterpriseOne and World, new functionality is delivered as updates to the existing release. Upgrades are not required to gain access to new features and capabilities. As the first customer to implement and use EnterpriseOne in the Cloud, we understand the efforts that await you on that upcoming digital transformation. However, if you're not quite at Cloud-level and are looking to upgrade your EnterpriseOne or World system, there are 3 approaches you can take.

### LIKE FOR LIKE

**LFL**

This is often referred to as a technical upgrade – in essence it is getting to the latest release with no intention of changing the way JDE is used to conduct the business. We recommend this most often in the following scenarios:

- You are relatively current (for example are on EnterpriseOne 9.0) and do not see major changes that could be of benefit
- You are somewhat current, but do not have the budget, energy, time or staff to do a more robust upgrade
- You would like to do more with the upgrade, but believe that getting the “technical foundation” in order first would make the most sense

### LIKE FOR LIKE PLUS LOW HANGING FRUIT

**LFL +  
LHF**

The principle for a LFL+LHF upgrade is that you want to do largely a technical upgrade, but also want to take advantage of some of the opportunities that are available in the new version. These opportunities are easy to implement and are most often smaller changes, such as implementing EnterpriseOne Pages, adding new functionality like Purchase Order approval or requisition entry, or eliminating smaller modifications.

- In virtually all cases, we recommend this type of upgrade over a straight LFL
- Invest a bit more time while you are in project mode
- Get some wins other than just getting current

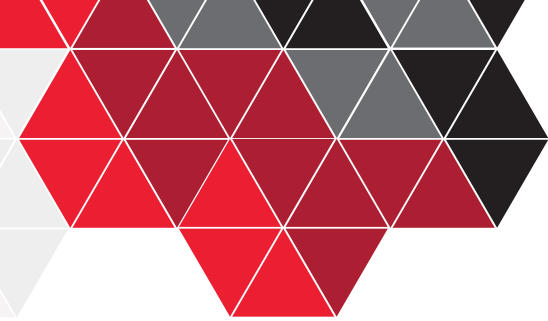
- Investigate areas of benefit like:
  - Latest Tools Release features
  - Mobile applications
  - Areas of pent up demand
  - Reporting improvements
  - Security needs
  - Functional changes
- Find opportunities that can add greater value to the upgrade project

### BUSINESS PROCESS RE-ENGINEERING

**BPR**

BPR is the most complex of the upgrades available, and also the one with the largest likelihood of providing significant changes to and benefits in the way you conduct business with your ERP. It is the best way to make sure you are maximizing your current investment in your ERP engine. We recommend this most often in the following scenarios:

- It has been more than 5 - 7 years since you first implemented JDE
- When you implemented, it might have been a “rush” job and, therefore, you did not investigate the full power available to you
- You have significant processes running outside of JDE and really want to look into replacing them within JDE
- There are large portions of functionality that you are not using and could benefit from (Manufacturing, Payroll, Contract/Service Billing, mobile applications) that are core to conducting business
- Your business has changed significantly since you last reviewed your usage of JDE such as being involved in a merger, changes in the markets or simply changes in company direction



# COMMON STEPS & DEPTH OF WORK

There are a number of stages for an upgrade project.

**Prepare/Plan/Scope** is where the project is defined, including:

- Resources, both external and internal
- Timelines and plans
- Scope definition (including a clear view of out of scope items)
- Conversion planning
- Replacement of mods and non-JDE functionality
- Issue tracking and project monitoring

	LFL	LFL + LHF	BRP
LEVEL OF EFFORT	Low	Low - Medium	Very High

**Technical Tasks** is where items of a technical nature are addressed, including:

- Creation of alternate environments and refresh plans
- Security implications
- Decisions on mods and replacement plan
- Disaster recovery review and update for testing
- Set up related to new items (ASU installation for new modules, server set up for technical support of other features)
- Application of all relevant ESUs

	LFL	LFL + LHF	BRP
LEVEL OF EFFORT	Medium	Medium	High

**Team Training** is where the project team receives base level training needed to support what will be done during the project, including:

- New tools type features like Advanced Query, Café One, One View Reporting, Watchlists
- New modules that are to be implemented
- Security changes to be enacted (in conjunction with the technical team)

	LFL	LFL + LHF	BRP
LEVEL OF EFFORT	Low	Medium	High

**Test and Prepare** is where set up required to support full CRP/integrated testing is done, including:

- Refresh of production data to the testing environment
- Set up of data to support any new features to be used
- Updated security set up, if desired to be testing in the first round of testing
- Creation of test scripts to support appropriate testing of all functionality
- Unit testing (non-integrated testing)

	LFL	LFL + LHF	BRP
LEVEL OF EFFORT	Low	Medium	Very High

**Conference Room Pilots** is where the project team receives base level training needed to support what will be done during the project, including:

- Full scale testing, including flows between modules, like Work Orders to Purchase Orders to Accounts Payable to General Ledger
- Data refresh prior to CRP
- Updates to system set up post CRP
- Updates to project plan/scope/timeline post CRP
- System stress testing

Most often, two rounds of the CRP will be performed.

	LFL	LFL + LHF	BRP
LEVEL OF EFFORT	Medium	Medium	Very High

# COMMON STEPS & DEPTH OF WORK (CONTINUED)



**Cutover Preparation** is where final preparation for the go live is performed, including:

- Preparation of final end user training materials
- Training plan creation or validation
- End user training
- Final conversion plan and enactment
- Final security updates
- Fall back plan revisions
- Readiness Assessment

	LFL	LFL + LHF	BRP
LEVEL OF EFFORT	Medium	Medium	Very High

**Cutover and Go Live** is where when the actual cut over is done, including:

- First live processing
- Enablement of go live support systems
- First month end processing
- Project closure/lessons learned/scorecard and plans for subsequent projects

	LFL	LFL + LHF	BRP
LEVEL OF EFFORT	Low	Low	High

In addition to our JD Edwards consulting services, we offer add-on solutions that can significantly extend the value of your EnterpriseOne and World in particular when tied to an upgrade project.

Since 2001, we have been focused on **delivering quality consulting services and solutions** to the JD Edwards EnterpriseOne and Enterprise World customer base. We have built our consulting practice with the industry's best and brightest. Our mission is to **provide the highest quality consulting services**, putting the needs of our clients first and foremost, while still enriching the skills, knowledge and expertise of our consultants.

## LOOK BEFORE YOU LEAP

Sometimes it is a bit tough to understand just what the best approach might be. The appetite and budget might be for a LFL, although your senses and users tell you that you really need to take a larger approach to the project.

Completing a pre-upgrade study is worth the effort.

- Plan for a review of your needs, a discussion of current issues and user requests, and your technology direction
- Review the upgrade documents available from Oracle
- Think about where you would like to be in 2 or 3 years
- Look for off system processes, new modules, mobile capabilities

## SIMPLIFY FUTURE UPGRADES

- Document your processes
- Document your enhancements and mods
- If you have not already built up knowledge documents and test scripts from prior upgrades, do so on your next one!
- Create a staffing and resource plan – how will you backfill or cover for key resources when (not if) you next upgrade?
- Stay current – attend conferences, get involved with SIGs, get informed, talk to other customers. If you build up potential improvements as you go along, you will be better armed when the time comes to upgrade
- Have documented all the touch points into and out of JDE

## READY TO UPGRADE? CONTACT US TODAY



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