JD Edwards

ENTERPRISEONE UPGRADE

Methodology

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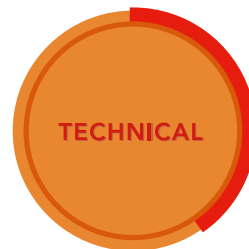
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EXECUTIVE SUMMARY

Briteskies utilizes a combination of JD Edwards' project methodology and our own experiences to help our clients upgrade their JD Edwards EnterpriseOne software. Our collaborative approach uses best practices from both waterfall and Agile methodologies, focusing on the need for frequent and timely project reviews, evaluations, and adjustments. Strict compliance with these practices increases the focus on the project each day, rather than allowing for distractions that confuse and detract from the project.

There are three kinds of JD Edwards upgrades: Technical, Functional, and Transformational. To learn more about the different types of JDE upgrades, click here.

Our preferred method is the "Like for Like" Technical upgrade.

The methodology presented below covers the phases typically used in such a project. However, the majority of this process also applies to a Functional upgrade as well. Read on to learn about our upgrade methodology phases in detail, as well as the Briteskies Team Members involved.

SYSTEM ASSESSMENT

TECHNICAL

USER ACCEPTANCE TESTING

GO LIVE PREP
GO LIVE

POST-GO LIVE SUPPORT

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For an EnterpriseOne Technical or Functional upgrade, the Briteskies team generally consists of the following roles:

Technical Team Members

Technical Team Members configure environments, upgrade the JDE software, apply required JDE code changes, design interfaces to third-party systems, and more.

Functional Subject Matter Experts

Functional Team Members support the Technical Team Members during System Assessment and Technical Phases by developing test scripts and training plans for UAT, and they assist in user testing during the UAT phase.

Project Manager

A Briteskies Project Manager mitigates risk and helps ensure that the client's requirements are met by managing the project deliverables, budget, and timeline.

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PHASE 1 – SYSTEM ASSESSMENT

During the System Assessment Phase, a Briteskies Technical Team Member completes an evaluation of the current status of the system, including the size and integrity of data files, security configuration and administration, and overall system stability. Functional Team Members and Developers begin to analyze the system objects that have been modified to determine which objects can be replaced with upgraded functionality and which will have to be retrofitted to the new version.

The System Assessment Phase determines the project scope and creates the organization and structure needed to complete a successful upgrade. The Project Manager plays a key role in this phase by bringing together project sponsors, stakeholders, and the implementation team to agree on scope, requirements, and measurements of success.

The most important deliverable from this phase is the Project Charter, which serves as an internal document and contract for the project team. It lays out the scope and objectives of the project, the roles and responsibilities of the project team members, and outlines how the project is going to be run.

DELIVERABLES

» An approved Project Charter

» Project documents including weekly status reports, issues logs, and change notices

» A detailed project plan

» Infrastructure and security issues and modified objects that need to be addressed during the upgrade

BRITESKIES BONUS

To learn more about the 12 sections of a Project Charter, click here.

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DELIVERABLES

» Status of all modified objects identified in the System Assessment Phase

» Functional configuration for new or revised business processes, if a Functional upgrade

» A detailed Go-Live task list

» Results of the mock Go-Live

» Test scripts

» An End User training plan

PHASE 2 – TECHNICAL

During the Technical Phase, Briteskies Technical Team Members install the new EnterpriseOne environment and, once the environment is available, Briteskies developers will retrofit modified objects to the new version. For a Technical upgrade, the modifications will be moved over to the new environment as-is with no changes to documentation or code unless such changes are required for the new modified object to function as originally designed. For a Functional upgrade, any new functionality would be configured and unit tested at this point.

Functional Team Members document test scripts during the Technical Phase, conducting on-site visits to observe processes and interview users as required. Additionally, the client's technology team is trained throughout the software upgrade process, typically by shadowing the Briteskies consultant. Business users on the project team are trained by Briteskies' Functional Team Members in preparation for User Acceptance Testing.

The Technical Phase concludes with a mock Go-Live.

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DELIVERABLES

» Completed test scripts with documented results approved by the client user community and appropriate client managers

» Finalized upgrade processes and timelines, custom applications, data conversions, and interfaces

» End User training

» Readiness assessment

User Acceptance Testing (UAT) includes all the activities required for testing prior to Go-Live and production processing in the system. It is a focal point for the client's project team.

Briteskies Team Members will assist the client's users in conducting User Acceptance Testing (UAT) using the scripts developed in the Technical Phase, with support from the Briteskies Technical Team Members and the client's user community. The previously identified client resources will need to be available to conduct specific test scenarios and approve test results with a signature of the test script.

PHASE 4 – GO-LIVE PREP/GO-LIVE

Go-Live Preparation begins after all UAT test scripts are signed by the client. **During this phase, Technical Team Members prepare the production environment for Go-Live and client management will be asked to make a go/no-go decision.** Go-Live Weekend will occur once approval from the client is secured. The Briteskies Technical and Functional Team Members will be onsite to complete the data conversions and other Go-Live tasks.

Go-Live Weekend begins at the close of business on Friday or Saturday morning after all backups are complete. The objective is to have the system ready for a go/no-go decision by early afternoon on Sunday. This gives everyone involved the remainder of Sunday to do another round of backups so that when business resumes Monday morning, the upgraded system is up and running.

The schedule is adjusted in cases where the business runs 24/7 or if there is a major time zone discrepancy between Briteskies and the client, such as with a European-based client.

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REMEMBER

Going Live is a Process, Not a Milestone!

The objective of this phase is to begin using the software in the day-to-day operations of the customer's business. This requires that all of the software and hardware components be in place to ensure success and minimize the impact on the customer's business activities.

Briteskies Team Members are available for a minimum of two weeks to provide Post-Go-Live Support. During this phase, a centralized war room is set up with a conference line so that everyone involved has one central place to dial into should issues or questions arise. The client's help desk ticketing system is also utilized.

A project retrospective is completed at the end of the support period to identify what went well during the project, what could be improved upon in future upgrades, and what follow-on process improvement projects should be pursued.

If best practices are followed and all parties involved communicate clearly with one another, then the EnterpriseOne Upgrade should go off without a hitch.

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Briteskies helps companies realize the full potential of their investment in their JD Edwards system. If you are looking to upgrade your JDE system, need support to improve your back office business processes, or are interested in integrating your JDE system to an eCommerce platform, our certified consultants have the functional and technical expertise to assist you in achieving your business goals.

We are proud to be an Oracle Gold Partner, a Magento Professional Solution Partner, and an IBM Advanced Business Partner. Our talented team consists of certified developers in JD Edwards, Magento, and WebSphere Commerce, as well as IBM i Application Specialists.

CONTACT BRITESKIES

216.369.3600 | info@briteskies.com

www.briteskies.com

2306 West 17th Street, Suite 1
Cleveland, Ohio 44113