



Adding value by upgrading to E1 9.1
Stress-Free JD Edwards 17th June 2014
Kit Mundy - Differentia Consulting

...introduction to Differentia Consulting

- Independent consulting firm, specialising in JD Edwards and QlikView
- Ex KPMG Consulting
- Oracle JD Edwards partner since formation in 2002 
- Providing a full service for both JD Edwards and QlikView
 - Consulting / applications development
 - Software licences
 - Training
 - Applications and technical support
 - Technical architecture / hardware sizing
- Specialised CNC capability - we have a very strong CNC team, UK based
- Complementary solutions

...our solutions



Business Intelligence with a difference

Simplicity, Association, Speed
Templates for JD Edwards
... Seeing is Believing



Agile Budgeting and Planning
Location Analysis
NPrinting
Mobile
Predictive Analytics
Meta-Data Management

NIMBUS Control 2007

Manage and Transform with Process Management

Capture, analyse and communicate common business processes
Reduce time, effort and cost to deliver process management




JD Edwards EnterpriseOne

JD Edwards World



OUTPERFORM THE FUTURE™


Magic xpi Integration
Magic xpa Rapid Application Development

Application to Application
Business to Business
Process to Process



Enterprise Content Management

Document Management
Workflow
Purchase to Pay automation



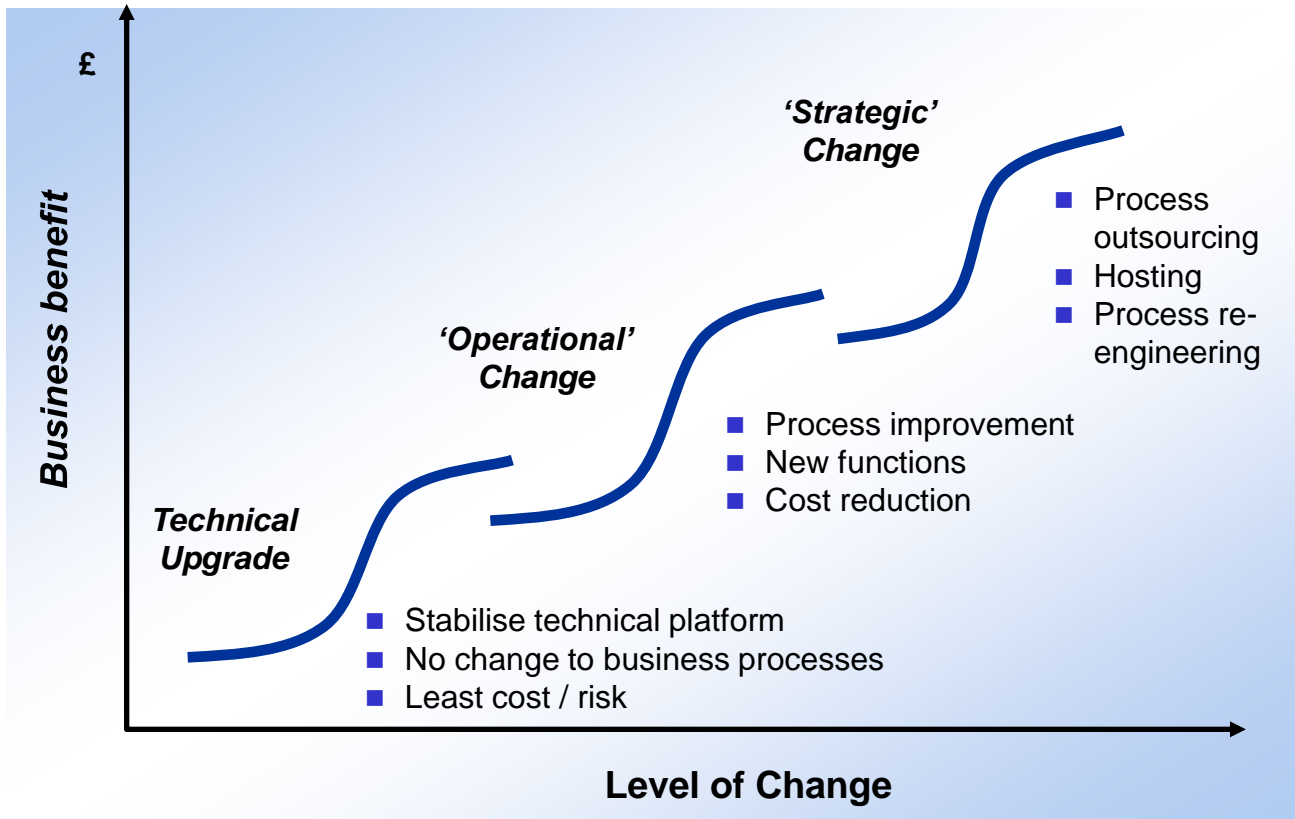
Training, Proficiency and Performance

Considerable cost savings
Deliver training before live systems!
Lower Help Desk overheads
Adhere to best practices

...objectives for today

- Differentia Consulting have been engaged this year in a number of successful upgrade projects
 - to E1 9.1 from most releases including World, Xe, ERP8, 8.10, 8.11
- The purpose of this presentation is to share with you some of that experience, based on real customer projects, in particular:
 - data migration
 - reporting
 - training
 - resourcing

... developing a business case



- There are few hard benefits of upgrading without changing business processes as well
- What level of change is appropriate?
- Need to balance projected benefits with cost/risk

...business discovery

- **‘baseline’ current performance**
 - identify where things go wrong now (eg in customer service, lead times, excess stock, reporting accuracy and timeliness etc)
 - Identify ‘pain points’
- **identify improvements**
 - remove non value adding processes
 - simplify where possible
 - automate where possible
 - quantify the benefits
- **implement ‘quick wins’**
- **prioritise everything else**
 - must do / could do / wish list

...data migration

- Probably the most complex and high risk part of the upgrade project
 - Don't migrate more data than you absolutely need
 - Consider cleaning data as much as possible prior to the upgrade
 - Consider purging unwanted data
 - Separate out historical data which can be migrated after go-live
 - Automate where possible as you will need to migrate business data multiple times, for testing, training as well as for go-live

...clean and archive your business data **before** upgrading

- **Clean business data (end user)**

- data accuracy
- obsolescence

- **Clean database (IT)**

- data integrity
- data volumes

- **Define data retention policies**

- history
- security and access

- **Archive old data**



- **Benefits**

- accurate and current data
- reduced cut-over time
- reduced testing time pre and post cut-over
- lower storage costs
- improved system performance
- fast and secure access to historical data

...analyse
and clean
your data

- make it visible
- green/white/grey


The screenshot displays the differentia.co software interface. At the top left is the company logo and tagline. The main area features a 'Customer Search' bar and a 'Current Selections' panel showing 'Sales Rep Name' as 'Amanda Honda'. Below these is a large 'Address Book' table with columns for Customer Number, Customer, and three Customer Address fields, along with City, State, Zip Code, and Country. The table lists various companies like Bibb Manufacturing Company, Big Planet, and Bre-X. On the left side, there are several filter panels: 'Division Name' (Domestic/International), 'Region Name' (Canada, Central, etc.), 'Customer Selections' (Customer No, State, Ship To), 'Customer (18/638)' (listing companies like Bibb Manufacturing Company), and 'Sales Rep (1/63)' (listing sales reps like Amanda Honda). At the bottom, there are buttons for '80/20 Rule' and 'Sales Rep Performance', along with contact information: e: qlikview@solutions.differentia.net and i: www.differentia.net.

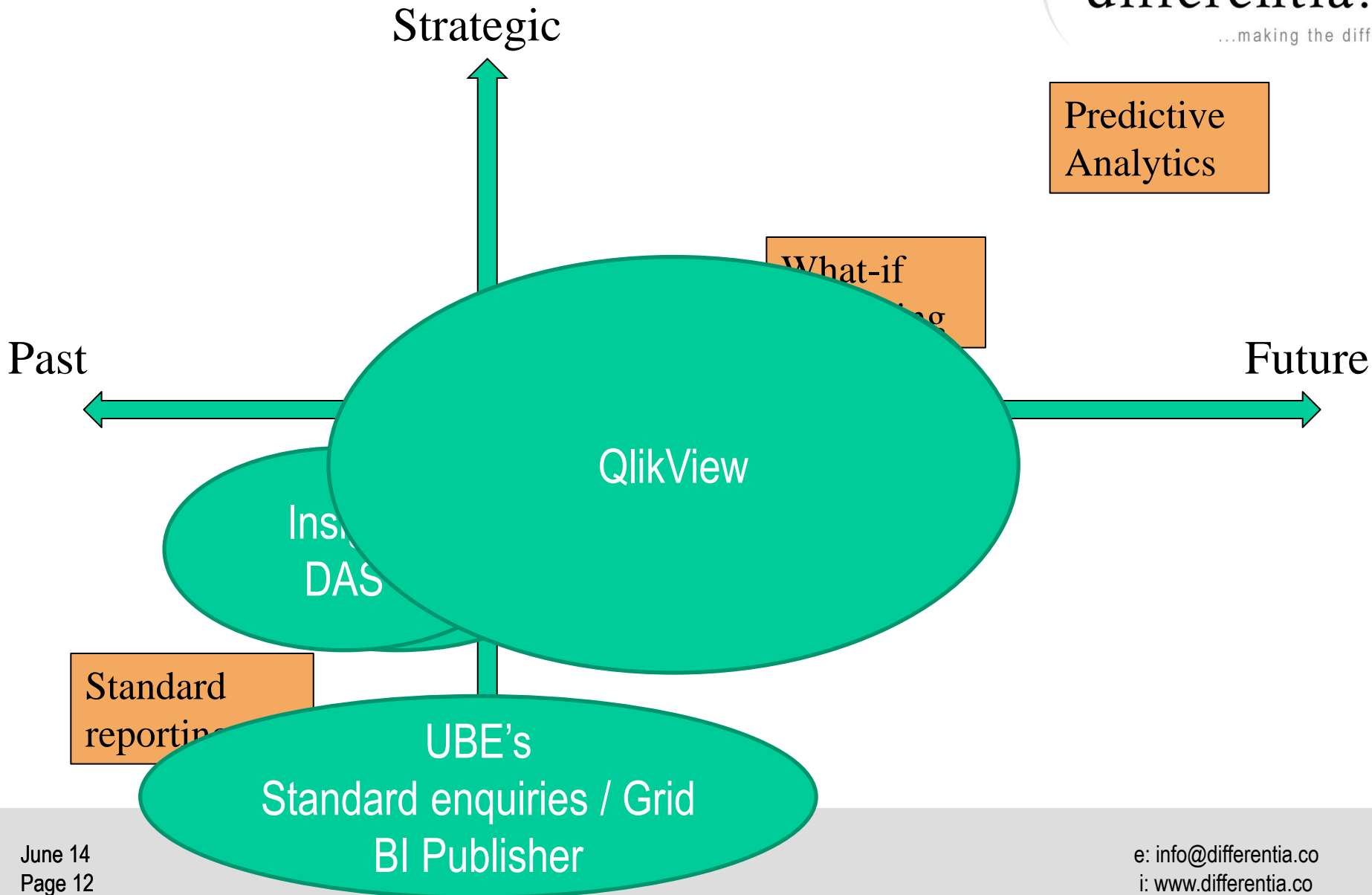
...data migration tools

- Oracle standard table conversion tool
 - Copies all business data from release to release
 - Ideal for a technical upgrade with no changes to master data or business processes
- Bespoke UBEs to import selected data via z tables
- Manual data entry
 - Simple option, in particular for open SO's, PO's, WO's
- Consider specialist integration tools such as Magic xpi



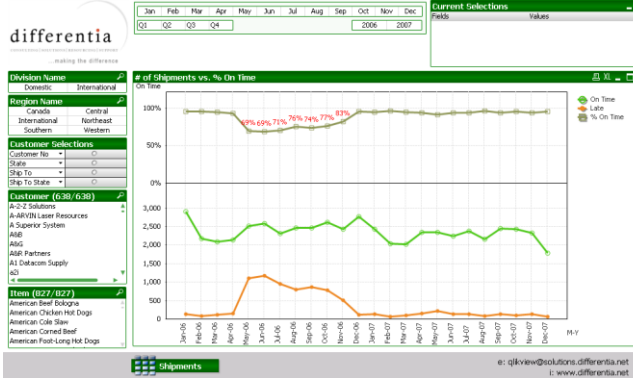
...reporting

- Lots of options now for reporting in 9.1
 - Grid
 - Data Browser (for power users)
 - Standard Reports
 - BI Publisher
 - One View Reporting
- 3rd party complementary reporting tools
 - Insight Software
 - DAS
 - 



...reporting

- In our experience, reporting is almost always left too late on in the upgrade process and is invariably rushed
- Take the opportunity to rationalise your existing reports – many will be obsolete or variations of the same report
- Redesign your processes and encourage the use of enquiries using the grid rather than printing out to pdf
- Allow your users to access and generate their own reports / views to reduce the load on IT
- Design your KPIs and reports prior to the upgrade



...reporting

Benefits:

- no change in KPIs / reporting
- supports user acceptance
- aids data validation in UAT and at go-live
- minimises level of change

Data sources eg:



Excel



Access



Salesforce

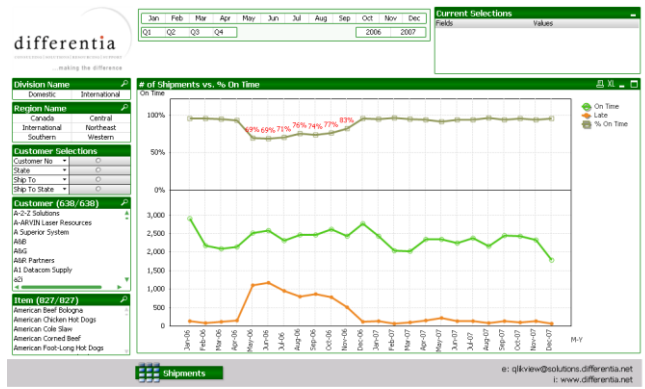


JDE World

Data Migration



JDE E1 9.1

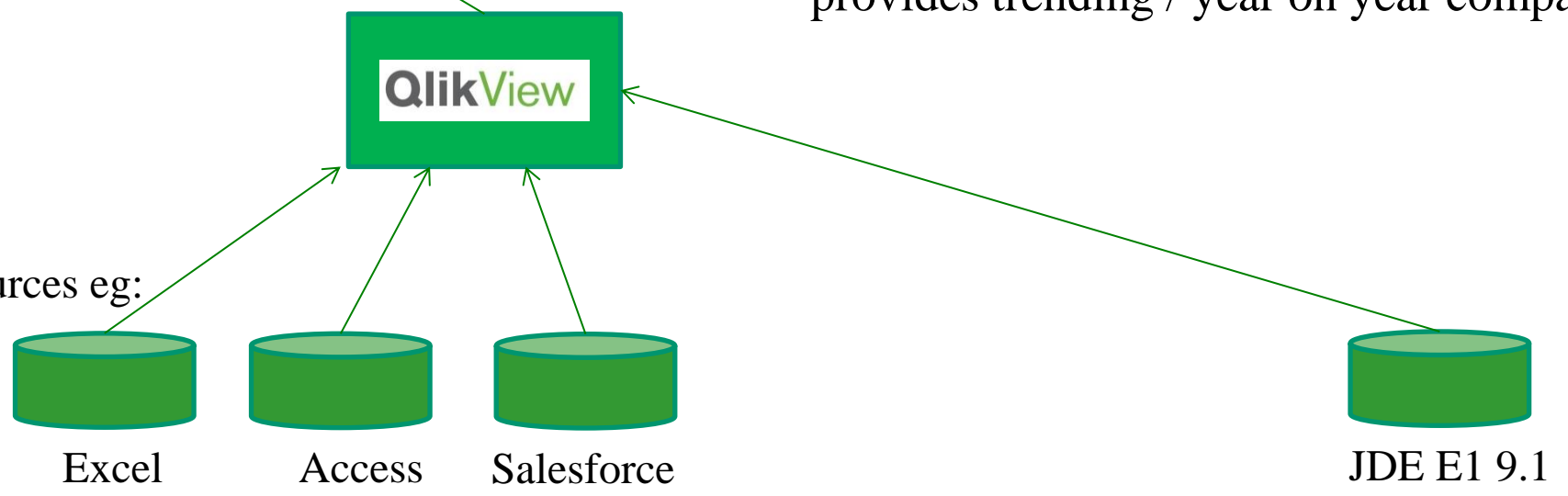


...historical data

Benefits:

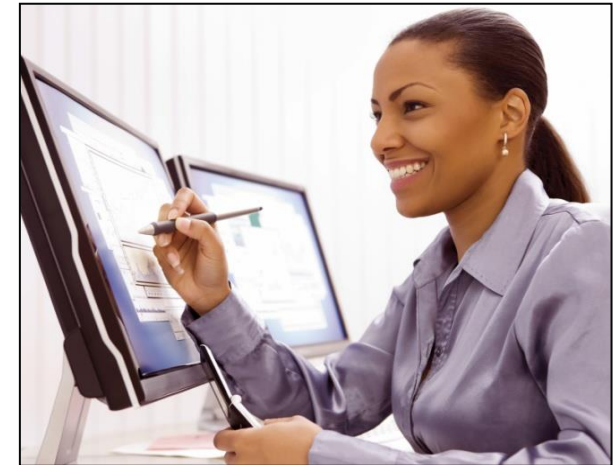
- no change in KPIs / reporting
- no need to migrate historical data
- provides trending / year on year comparisons

Data sources eg:



...training

- End user training
 - new E1 9.1 user interface is intuitive and existing E1 users find it easy to navigate
 - more of a change if migrating from green screen or if changing business processes
 - UPK is a good tool in both situations
- Technical training
 - E1 9.1 apps and tools release introduces new technical functions which require new skills eg in WebLogic / Websphere, portals, mobile
 - this is a major consideration if migrating from World running on AS/400



ORACLE

USER PRODUCTIVITY KIT

Integrated software suite with full life cycle training tools supporting design to assessment.

...resourcing

- there are a lot of companies looking to upgrade in 2014
- specialist skills are becoming rarer and are in demand, in particular
 - CNC
 - Training
 - Manufacturing
- (hence upward pressure on salaries / rates)
- consider outsourcing certain support services to a specialist JD Edwards partner

...conclusions

- planning is key
- learn from others who have done it before
 - other JD Edwards users
 - Oracle
 - your consulting partner
- start preparing early
 - process design
 - data cleansing and archiving
 - training
 - technical planning and scoping

...how can we help you to get started?

- one day client focused upgrade workshop (foc)
 - focus on specific client issues
 - technical infrastructure review
 - improvement areas
 - outline project plan
 - budget costs / resources / timescales
- technical assessment / health check
- business case development
- business process design based on our JDE best practice processes
- data cleansing and archiving
- business performance analytics and reporting with QlikView JDE templates