

# Build your upgrade case for “Go9“ to „Stay current“

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Schlüsselworte:

ORACLE JDE E1 – - EnterpriseOne Upgrade – Stay current.

Einleitung

This session will present the Oracle recommended upgrade path “Upgrade Advisor” and latest development of tools and resources available to build a business case and support ROI to upgrade or migrate to the current release of the software.

## 1. *Scope of the Upgrade Advisor path*

The Upgrade Advisor takes you through the process and steps of upgrading the JD Edwards EnterpriseOne components. This will include upgrading all aspect of JD Edwards EnterpriseOne from tools and applications as well as the database Table Conversions.

An JD Edwards EnterpriseOne implementation contains other Oracle and/or 3rd party components that you may also be upgrading at the same time such as: Database, Application Server, and the various Operating Systems on those servers. The upgrade advisor provides a roadmap and information about what is certified with EnterpriseOne as well as complimentary information and guidelines to help you upgrade those components. The primary purpose of this Upgrade Advisor is to convert your JD Edwards EnterpriseOne implementation to the latest release of JDE EnterpriseOne 9.0.

The Upgrade Advisor follows Oracle’s recommended Upgrade path using standard JD Edwards environments but the concept can also be used to upgrade custom environments. The process of identifying customizations and enhancements that may now be available or may need to be retrofitted in the base release of the product are an important part of the overall upgrade evaluation.

*Overview - EVALUATE:*

The goal of the UPGRADE - EVALUATE phase is to evaluate future and core business requirements and explore new possibilities for the enterprise to improve efficiency, effectiveness, or competitive advantage. Emphasis is placed on improving existing software and/or hardware within the environment.

Areas of Focus:

- Upgrade strategy from your JD Edwards EnterpriseOne release to the latest EnterpriseOne 9.0 or 9.x

- Reduce customization to standard functionality
- New or additional technology & functionality
- Process change/improvement

Expected Outcome / Deliverables:

- Business justification for Upgrade
- Understanding of the risks and rewards
- Awareness of costs and deadlines

*Overview - PLAN:*

The goal of the UPGRADE - PLAN phase is to determine the details of the upgrade project. These are the project management details all the way from the System Designer's /Architect's responsibilities to additional training for the end-user.

Areas of Focus:

- System Requirements Analysis
- Project Management
- Action Plan & Timelines
- Assessment of End-User Impact
- Resource planning
- Risk Assessment

Expected Outcome / Deliverables:

- Clear and unambiguous understanding of the relationship with Oracle Global Software Support
- Overall Project plan for the completion of the upgrade on the Live system
- Preparation of Testing facilities
- Establishment of a viable test plan
- Understanding of the training needs for both operational and end user communities
- Understanding of the current and future support positions

*Overview - CONFIGURE:*

The goal of the UPGRADE - CONFIGURE phase is to develop and validate system solution. Emphasis is on the install & configuration of components. Configuration steps include integration testing ensuring that components fit/function together seamlessly. This phase also prepares for UAT-User Acceptance Testing.

Areas of Focus:

- System setup/configuration
- Integration testing
- Standalone/Client configuration

Expected Outcome / Deliverables:

- Ready to test, upgraded environment (UAT ready)
- Sign off by implementation team (no show stoppers )
- Document list of outstanding issues ordered by severity
- Documented test scripts for UAT

*Overview - TEST:*

The goal of the UPGRADE - TEST phase is to ensure that the system is tested thoroughly by end-users and they accept the new changes.

Areas of Focus:

- Proof of concept Validation
- Iterative Test Cycles, allowing for re-planning or re-configuring
- Performance & reliability
- UAT Acceptance
- Compliance (Sarbanes-Oxley and SAS 70)

Expected Outcome / Deliverables:

- Defect Prevention
- Legal Compliance
- Works as expected/Functionality Validation
- Meets Business and Technical requirements (Business can continue)

*Overview - IMPLEMENT:*

The goal of the UPGRADE - IMPLEMENT phase is to move tested change into production/operation mode. Production environments are transitioned to the newer version.

Areas of Focus:

- Training
- Implementing Cutover plan
- Executing Data migration
- Bus Flow & Data Quality Check
- Establish Backup Environments Dev,Test,Pre-prod
- Documentation updates/additions

Expected Outcome / Deliverables:

- Training Plan and Execution (Technical and Functional)
- System Documentation
- Production System

*Overview - ACCEPT:*

The goal of the UPGRADE - ACCEPT phase is to secure the agreement of business users and executive management that the upgraded version meets business needs.

Areas of Focus:

- Securing End-user approvals
- Securing Management approvals
- Decommission of former systems/processes

Expected Outcome / Deliverables:

- User Pass/Fail Acceptance
- Business Management Pass/Fail Acceptance
- Contractual/Legal Pass/Fail Acceptance
- Document Lessons Learned
- Meets Business and Technical requirements (Goals Met/Business Value)

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