

JD Edwards EnterpriseOne Upgrade & Impact Analysis

A DWS Client Success Story



Client

Founded in 1921, Wilbur-Ellis is a leading international marketer and distributor of agricultural products, animal feed and specialty chemicals and ingredients. Still a family-owned business, its annual revenues exceed \$3bn.



WILBUR-ELLIS®

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The Challenge

Compelled to upgrade because its current solution was nearing end-of-support, Wilbur-Ellis wanted to both reduce its modified footprint and accurately estimate the level of effort required to retrofit all in-scope modifications to the 9.2 level.



Delivery

Wilbur-Ellis opted to use DWS Dimension Analyze™ to forensically analyze both the existing modified footprint and the net changes made by Oracle, down to a pixel level of detail.

Post-audit, DWS was commissioned to carry out the technical retrofit/upgrade works.



Result

The DWS Dimension Analyze audit led to a 39% reduction in the modified footprint, saving 236 days of retrofitting work. The upgrade project was delivered three weeks ahead of schedule, with minimal defects.

About the Client

Wilbur-Ellis will be celebrating its centenary year in 2021. Comprised of three operating divisions, it employs more than 4,000 people in 240 offices across three continents.

JD Edwards EnterpriseOne has been the ERP of choice since 2003. With over 1,800 users, 700 of which connect concurrently via Citrix, JDE E1 is an integral part of the business.

Following a major upgrade from 8.9 to 9.0 in 2011, Wilbur Ellis was keen to remain on a fully supported version of JDE E1. With 9.0 out of support from Nov 2018, the decision was made to upgrade to 9.2 before the support deadline.

Prior to the 9.2 upgrade, Wilbur Ellis maintained a highly customized version of JDE E1, with more than 3,600 objects in its modified footprint.

“If we hadn’t used DWS and Dimension Analyze, we wouldn’t have been as confident that we’d identified all affected objects.”

Jenny Catlett, Director of Applications, Wilbur-Ellis

Background

With Extended Support of 9.0 ending in November 2018, Wilbur-Ellis was already planning an upgrade when Oracle announced in early 2017 that EnterpriseOne 9.2 would have extended support until at least 2028.

The extended support announcement was a catalyst for Wilbur-Ellis to accelerate their upgrade planning and analysis. However, it wasn't the only reason to upgrade.

Wilbur-Ellis was keen to reap the benefits of a code-current strategy. In particular, it was looking to make the most of the latest features and tools updates; including Orchestrator, AIS, UI and Mobility.

The Challenge

The previous upgrade experience was an 18-month project, involved 30,000 hours of effort and a project team of 8 business analysts, 2 full-time testers, 3 internal developers and some additional support from an outsourced development partner.

For the upgrade to 9.2 the challenge was to find a way to significantly reduce the time and effort involved in the project, whilst improving the quality of the upgrade process and transforming the end-user experience.

The upgrade also represented an opportunity to reduce the number of modifications in use, decommission unused objects and move closer to a standard code base.

Impact Analysis

Wilbur-Ellis maintained a highly modified implementation of JDE E1, with over 3,600 modified objects and more than 400 version overrides.

A significant number of custom objects were utilized for critical business functions within Order-to-Cash. To accurately estimate the effort required for the upgrade to 9.2, the project team needed a detailed audit of the current modified footprint.

Choosing a Partner

Before committing to a partner for the upgrade itself, Wilbur-Ellis wanted to assess several potential suppliers; asking them to analyze the current JDE E1 implementation and provide an upgrade proposal.

“When we started out, there were four names in the hat; but this shortly became just one.”

Jenny Catlett, Director of Applications, Wilbur-Ellis

Jenny Catlett, Director of Applications, explains the selection process: “I’ve been a part of the JD Edwards community for twenty years and I was aware of DWS. When I talked to Oracle about our project, their name came up. Then, when I was talking to another potential upgrade partner, their name came up again.”

DWS were engaged by Wilbur-Ellis, initially to undertake the systems audit, and subsequently to carry out the technical retrofit and QA works

DWS Dimension Analyze

Dimension Analyze™ is a software-led service that audits a JD Edwards EnterpriseOne implementation, identifies what custom code is no longer required and estimates accurately the effort involved in upgrading to the new release.

“The Wilbur-Ellis project is not your typical upgrade” explains Jenny. “The initial audit indicated over 5,300 hours of upgrade effort. We also have some significant mods; the top 5% of which, by object count, account for 63% of the total effort.”

“With 9.2 being supported to 2030 and beyond, this may well be the last major upgrade we need to do” emphasizes Jenny. “Having been through a couple of major release upgrades in the past, I know how important it is to have an accurate view of what objects will be impacted by the change event. Almost as important is knowing which objects won’t be affected, so won’t need retrofitting or testing.”



One of the key benefits of using Dimension Analyze was the acceleration of the functional and technical analysis of the modified footprint. Without it, not only would the audit have taken longer, but the uplift effort itself would have been significantly greater.

Following the initial audit, Dimension Analyze identified a 39% reduction in the modified footprint, saving a potential 236 days of effort. The revised footprint of 2,252 objects and 200 version overrides provided a foundation for upgrade planning; including resourcing, functional assessment and prioritizing, which uncovered opportunities to further reduce the modified footprint.

The worst-case scenario for any upgrade is to discover objects further down the line during testing, or even post-go-live, that have been impacted. "If we hadn't used DWS and Dimension Analyze, we wouldn't have been as confident that we'd identified all affected objects" highlights Jenny.

"The initial investment in Dimension Analyze will be returned many times over because the project will be more predictable, with no nasty surprises along the way."

Jenny Catlett, Director of Applications, Wilbur-Ellis

"The degree of accuracy and depth of analysis was much greater than we could have done ourselves, and we couldn't spare the resource to do it properly," says Jenny. On the back of the audit, DWS was able to use the results of the analysis to provide Wilbur-Ellis with a fixed price and timescale for the retrofitting component.

The Upgrade

The forensic level of detail provided by the Dimension Analyze audit enabled the development of a clearly defined critical path. The scope of the project included the standardization of localized deployments and over 80 integrations with cloud-based, third party applications; including connections to AWS, external cloud APIs, file-based EDI, email and more.

The upgrade project represented an opportunity for Wilbur-Ellis to eliminate some obsolete objects and move towards a more standardized implementation. Here, Ankur Goswami, Lead Developer for Wilbur-Ellis explains the project scope in

more detail.

"For this upgrade, we were looking to clean house. Using more standard objects would help support our code-current strategy going forward. At the same time, we could retire some old code and eliminate a significant number of obsolete objects and customizations".

The upgrade was a collaborative project from the start, with Wilbur-Ellis developers working side-by-side with the DWS team. For much of the retrofitting, DWS was responsible for the development work. However, for some tasks, Wilbur-Ellis developers carried out the upgrades and relied upon DWS for the QA.

"Communication is essential to effective project delivery" explains Ankur. "We ran monthly steering committee calls, backed-up with weekly status meetings and daily standups with the developers and business analysts".

"The experience has been excellent throughout, with great feedback from everyone – including the technical team."

Jenny Catlett, Director of Applications, Wilbur-Ellis

Dimension Professional

Dimension Professional™ is a suite of tools that leverages data produced by Dimension Analyze. It allows DWS to fully manage and fix the price of the modifications uplift component of any EnterpriseOne upgrade. Utilizing a best-upgrade approach, the Dimension Professional toolkit also enables DWS to deliver the lowest defect levels in the industry.

Dimension Professional is QA-driven and leverages smart bundling, sequencing and delivery. Used jointly by Wilbur-Ellis and DWS, the Professional toolkit enabled tasks to be shared between teams and was instrumental in delivering the project three weeks ahead of schedule, with minimal defects.

“From the beginning, this upgrade looked and felt better than previous projects. Not only did we have to retrofit fewer objects, we also saw fewer defects.”

Jenny Catlett, Director of Applications, Wilbur-Ellis



About DWS

Since 1998, we have been providing development and technical services to organizations looking to customize, integrate, extend, upgrade or support implementations of EnterpriseOne. We also sell EnterpriseOne testing products that leverage our deep domain expertise and help customers run smaller, faster and smarter projects.

DWS serves a global client base using proven methodologies and proprietary DWS Dimension™ tools. Our best-practice approach and eye for detail help us deliver products and services that save time and money and continually drive down your TCO for JD Edwards.

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