dws
AGEST GROUP

GET CURRENT, STAY CURRENT

A Best Practice Roadmap For JD Edwards EnterpriseOne

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EXECUTIVE SUMMARY

In 2017, Oracle JD Edwards announced it would extend lifetime support for JDE EnterpriseOne release 9.2 until at least 2028; signalling an end to major product update releases and the beginning of a new era of continuous innovation and delivery. Recently, Oracle reaffirmed its long-term commitment to JDE E1 by further extending support to at least 2034.

With long-term support guaranteed, the JDE EnterpriseOne installed base is better placed to take advantage of the latest features available from new ESUs and Tools releases. In this publication, we look at the current JDE EnterpriseOne landscape; we see how customers are using the software and we gauge the intent of users in terms of their adoption of new features.

Get current, stay current has become the mantra for many JDE users. This guide outlines the benefits of embracing continuous adoption and implementing a code-current strategy; including risk mitigation, lowering total cost of ownership and sustaining a long-term return on your investment in JDE.

Despite the logical benefits of getting current and staying current, there are still a number of businesses that have not made the move to 9.2. At the beginning of 2023, roughly 14% of the install base were still running legacy code. To understand why, we explore some of the common barriers to adoption in detail. We also identify some of the tools available to help JDE users address these challenges and facilitate a get current, stay current strategy.

We include two recent use cases that illustrate the effectiveness of these tools and highlight the significant savings in time and resource that can be achieved whilst getting current and staying current.

Finally, we look to the future and examine how a program of continuous delivery could change the way organizations deliver JD Edwards projects; making them smaller, faster and smarter.

BACKGROUND

The Oracle JD Edwards keynote presentation at Collaborate 2017 was an affirmation of its commitment to pursuing a strategy of continuous delivery for JD Edwards EnterpriseOne.

In typically robust fashion, Lyle Ekdahl (Senior VP and General Manager of JD Edwards) appealed to anyone who considered themselves a truly digital enterprise to make the most of the extended life of JD Edwards EnterpriseOne Release 9.2 (JDE E1 9.2) with a simple mantra. Get Current. Stay Current.

Since Oracle purchased JD Edwards (as a part of PeopleSoft Inc.) in 2005, there has been a major release every 2 to 3 years (see table below); backed by a five (Premier) plus three (Extended) years lifetime support strategy. When first announced, this strategy was well received. A clear roadmap for development and support of any major ERP solution provides peace of mind for users and purchasers alike; helping to mitigate risk and ensuring a longer-term return on investment.

In April 2017, Oracle announced that it was moving away from the major uplift every 2 to 3 years to a program of continuous delivery. It is committed to building, testing and releasing software faster and more frequently; to make updates more routine, more predictable and less disruptive.

9.2 Roadmap

First released in October 2015, JDE E1 9.2 would have, under the old plan, been supported until 2023. With the planned program of continuous delivery, 9.2 is set to feature as the target code-base for the foreseeable future. By extending support for 9.2 to 2034, Oracle has established the longest published support timeline of any major ERP software vendor.

In October 2022, Oracle announced the availability of the latest JD Edwards EnterpriseOne Tools Release. Release 23 includes both Apps updates and Tools Release updates. This release includes more functionality to enable digital transformation and automation within the enterprise; including a range of new features and enhancements for Orchestrator, UX One and more, emphasis continues to clearly be placed on providing power users with simplified tools they can use to enhance and customize E1.

Version	Released	Upgrades to	Extended Support to
8.11	December 2004	December 2009	December 2012
8.12	April 2006	April 2011	April 2014
9.0	September 2008	September 2013	September 2016
9.0.2	November 2010	November 2015	November 2018
9.1	March 2012	March 2017	March 2020
9.2	October 2015	December 2034	Not applicable

WHY GET CURRENT?

JD Edwards EnterpriseOne 9.2 was a game changer for JD Edwards as it was built from the ground up with the digital enterprise in mind. Since being released, 9.2 has delivered a wide range of enhancements.

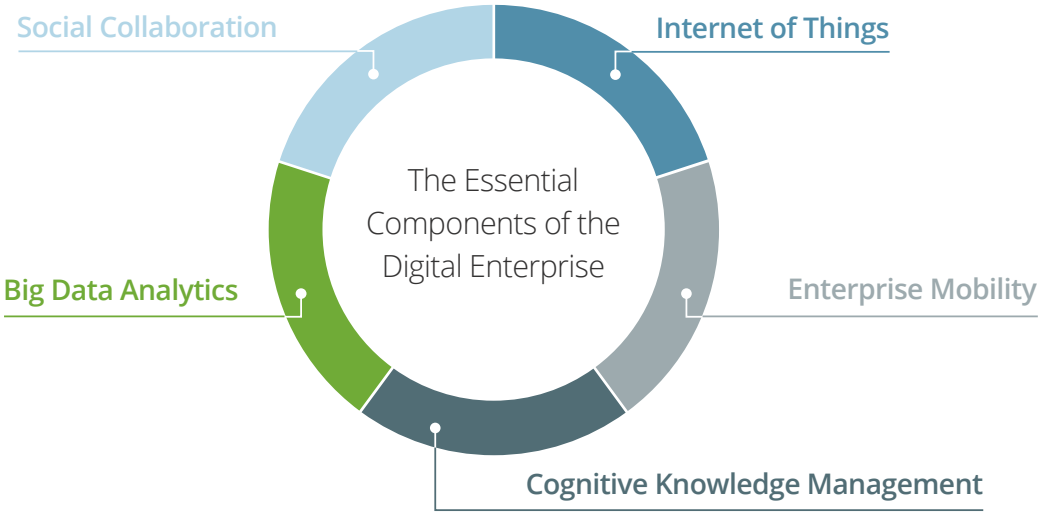
Oracle has established a pattern of releasing, not just standard maintenance patches, but some strategic enhancements and entirely new modules. In fact, there have been over 470 new application features and 280 tools enhancements since 9.2 was released.

The digital enterprise is one that embraces the pervasive use of digital technologies that are both location and device independent. More than that, it is a fundamental change in business process and policy – a change in what we do and how we do it.

It's about digitizing your operations, not just for "power users" but for everyone, including partners and customers. Allowing you to automate processes; collecting more data so you can make more informed decisions and become more agile.

9.2 Product Enhancements:

- Internet of Things (IoT) Orchestrator
- One View Financial Reporting
- JD Edwards UX1
- Customization Workbench
- Orchestrator
- UX One Foundation - User-Defined Objects
- Server Manager support for Multi-Foundation
- 64-bit Enablement
- Platform Certifications
- Project Forecasting
- EnterpriseOne Search
- Internet of Things (IoT) Studio
- Enhanced Rental Management
- Outbound Inventory Management
- Global Revenue Recognition
- Form Personalization
- Form Extensions
- Joint Venture Management Notifications



The concept of the digital enterprise is more than simply a commitment to using less paper around the office. If an organization is to embrace digitization and make the most of the benefits it offers, this approach must permeate every aspect of the business; starting with the back-office.

Achieving Digital Transformation for many organizations begins not with what they do, but how they do it. Although many tasks are digitally enabled, it doesn't make them truly digital. Manually inputting and checking data on a PC or tablet is still a manual task.

A truly digital business can expect to realise significant process improvements and efficiencies. The automation of repetitive or time-consuming tasks can both free up technical resource for more value-adding activity and de-risk the process by eliminating human error.

Modern businesses exist in an environment that has become increasingly connected; from remote IoT monitoring devices to unified communications and collaboration between mobile and office based employees. Operating in a big data environment presents both challenges and opportunities, because data might be big, but it's not clever.

Big data needs to be gathered, consolidated, transferred, stored and processed efficiently if it is to add the greatest value to a business.

Ultimately, it is the transforming of information to insight and insight to actionable intelligence that supports better decision making and is the defining aim of a digital enterprise.

Mobile working has become a way of life for most organizations. The JD Edwards mobile value proposition has been a core component of recent releases; bringing the power of JDE E1 to the point of process and extending functionality to field-based employees.

Anywhere, anytime access has put everything from digital data capture to role and location-based applications at the fingertips of mobile and remote workers – whether they are leveraging corporately owned devices or bringing their own.

JD Edwards' concept of "low-code, no-code" supports your teams by delivering flexible, cross application integration. This allows organizations to run their business the way they want. Less disruptive change events are likely to lead to greater levels of adoption, have less impact on IT resource and simplify the upgrade process. They are also likely to require less user training, allowing for more efficient adoption by users and wider business.

> **"By getting current and staying current, digital enterprises can make smarter, faster decisions."**

WHAT'S STOPPING YOU?

For years, an upgrade has presented a large-scale challenge for JDE E1 users. Fraught with risks and notoriously time consuming justifying the business benefits presented a difficult task. However, Oracle's extension of support for 9.2 and continuous delivery approach have changed the dynamics for establishing the business case for an upgrade significantly.

9.2 is the code line that Oracle is committing to – they are committing to support it until at least 2034 and will only announce a Release 9.3 if they are compelled to do so. This means that it does not make any business sense for customers to wait for a "next" major release.

This commitment, combined with Oracle's continuous delivery program, means the case for moving to 9.2 is stronger than ever.

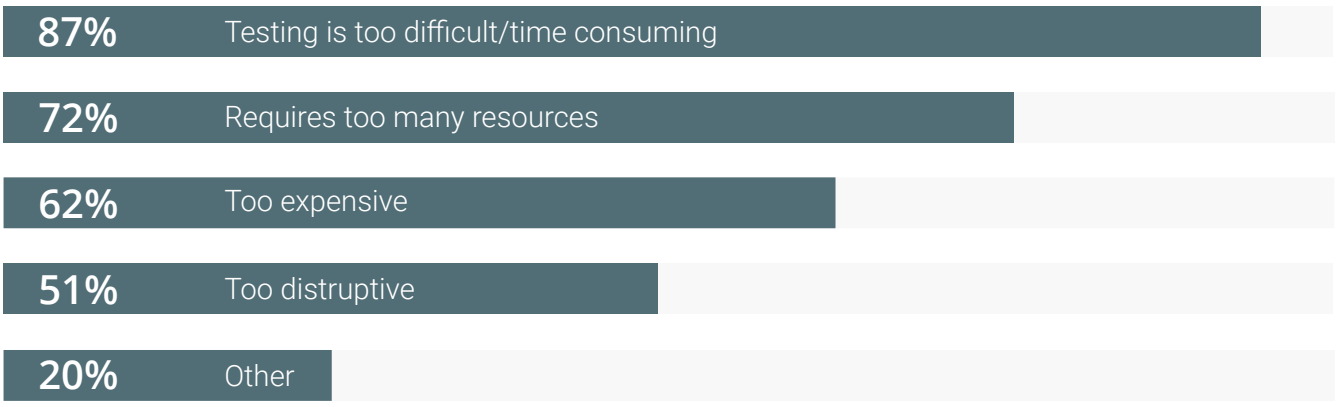
We reached out to our own JDE E1 customer-base to ask about their previous experiences of major upgrades to see what is behind their hesitance to adopt a code-current strategy.

Among the responses, there was more qualitative data to explain the reticence to move to a code-current strategy. Some organizations were content to adopt a hybrid strategy, staying current for payroll but only applying ESUs where failure to do so might impact on the business.

Conceptually, there was an understanding of the benefit of code-current, but "other priorities" always got in the way or "the net effect of continuous retrofitting" was perceived to be greater than the one-off effort associated with an upgrade.

There was also a frequent reference to the perceived time, expense and disruption this would cause to the business, particularly in respect to the number of custom objects in their code.

What Is Preventing You From Adopting A Code-Current Strategy?



Gain Clarity And Insight

It's clear to see that the absence of a detailed understanding of their modified footprint and an inability to accurately predict the time and costs involved in these projects remain barriers to change within the JDE E1 user-base. This insight is therefore critical to allow users to make a positive move forward towards code-currency.

Dimension Analyze™

For users looking to gain accurate insight of the size and complexity of their modified footprint.

The Dimension Analyze service audits your JDE E1 production environment, comparing this with a pristine environment and the new release, update or ESU to establish the most accurate view of your modified footprint.

Having established an accurate view of your modified footprint, users can then analyze every object, every line of code and every user setting/specification; down to a pixel movement level of detail.

This granular level of analysis enables users to identify decommissioning opportunities across their JDE E1 instance and can help reduce their modified footprint by up to 75%. This approach also allows organizations to identify any anomalies from the outset; enabling them to plan project resources and timescales with confidence and avoid any nasty surprises during upgrade.

Dimension Professional™

The Dimension Professional service leverages a suite of tools, using the Dimension Analyze data as a foundation; allowing users to attain a fixed price and timescale for the modification's uplift component of an EnterpriseOne upgrade.

The level of detail provided by Analyze, combined with the Dimension Professional methodology, allows for the delivery of the lowest defect levels in the industry.

Services like Dimension Professional deliver a range of benefits:

- Fix the price and timescales of your upgrade projects
- Access role-based tools for Project Managers, Developers and QA's
- Identify the exact location of all your EnterpriseOne changes
- Validate your instance against known E1 upgrade issues
- Understand the interdependencies between all E1 objects
- Access Dimension Net Change™ data to fully understand the impact of any upgrade
- Significantly improve developer productivity and "right first time" ratio

WHY STAY CODE-CURRENT?

As a part of Oracle's drive to encourage JD Edwards users to 'Get Current and Stay Current', it has detailed the reasons why code-current is the preferred strategy.

Firstly, code-current is about mitigating risk. Older system components are no longer certified or supported and can lead to system vulnerabilities, exposing your organization to unnecessary risks.

Code-current means taking advantage of hundreds of enhancements that have been driven by industry SIGs and developed in partnership with current EnterpriseOne customers.

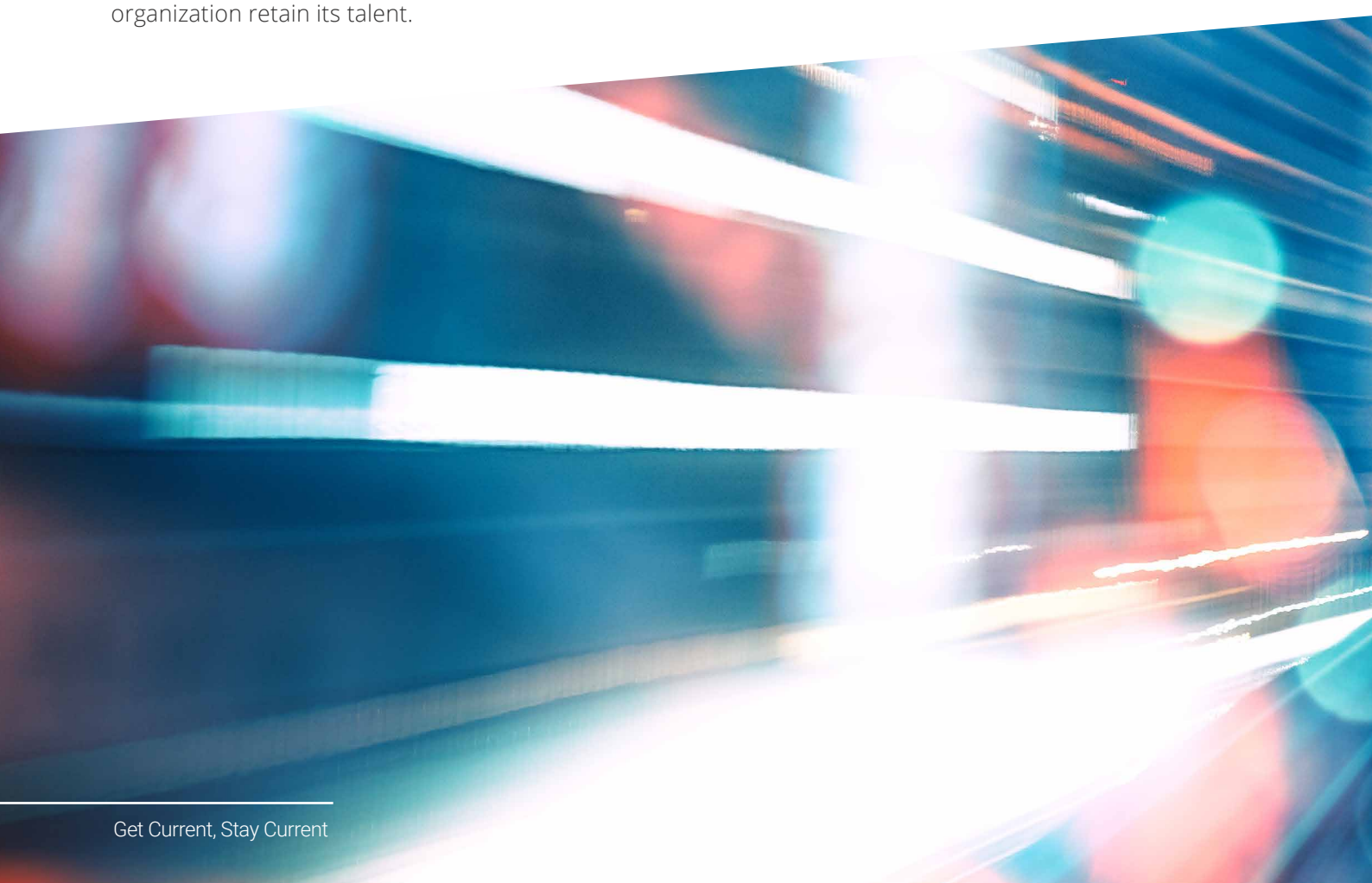
Oracle has invested billions into its technology and solution development. JD Edwards continues to receive its share of this investment; remaining code-current allows users to benefit immediately from the latest features and enhancements as they are released.

Users and IT departments do not like using what they perceive to be old-fashioned or outdated technologies as they feel it reflects badly on them as individuals. Staying code-current could help your organization retain its talent.

Staying code-current supports broader IT strategies, such as mobility and BYOD (Bring Your Own Device). Older versions of the software may not support tablet and Smartphone users, adding complexity to the IT estate and introducing additional access points.

Failure to stay code-current may mean you no longer meet compliance obligations dictated by the constantly evolving local or regional tax and regulatory requirements.

If customers are reticent to keep code-current, then they will find it more difficult to install ESUs which fix any issues that they may encounter. These ESUs will often come with dependencies on other ESUs that need to be installed at the same time. This not only increases the amount of testing required, but also increases the chance that objects delivered in those ESUs will have been modified by the customer, and therefore need to be upgraded.



Dimension Tempo™

The Dimension Tempo service takes advantage of, and leverages the Dimension Analyze™ and Dimension Professional™ tools.

With Dimension Tempo a cadence (or rhythm) is agreed with the user, allowing them to regularly analyze their JDE E1 environment and any and all updates available from Oracle.

This should be actioned annually or bi-annually with a view to delivering very manageable code-current change event projects. Each code-current change event project ultimately includes the retrofitting or uplifting of any custom-modified objects impacted by updates made available by Oracle.

By design, Dimension Tempo will help users committed to JDE E1 get the most from the continuous-delivery regime adopted by Oracle JD Edwards from release 9.2.

Dimension Tempo moves organizations away from the large infrequent capital expenditure (CAPEX) upgrade projects of days-gone-by, to an operating expense (OPEX) based run, maintain, and evolve model allowing costs to be smoothed and made more predictable.

USE CASE 1

WILBUR-ELLIS®
Ideas to Grow With®

Wilbur-Ellis employs over 4,000 people in over 240 offices across three continents. It is comprised of three separate operating divisions that share a single worldwide ERP platform.

The decision to consolidate all divisions to Oracle JD Edwards was made in 2003, with the original implementation project taking two years. A major upgrade to 9.0 followed in 2011.

Wilbur-Ellis runs a highly-modified instance of JD Edwards EnterpriseOne and has 1,500 active users.

The Challenge

Compelled to upgrade because its current solution was nearing end-of-support, Wilbur-Ellis wanted to reduce its current 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 Dimension Analyze™ to forensically analyze both the existing modified footprint and the net changes made by Oracle, down to a pixel level of detail.

The company then went on to execute an upgrade project, using the Dimension Professional™ methodology.

Result

The Dimension Analyze audit led to a 39% reduction in the modified footprint, which in turn saved a further 236 development days of technical retrofitting and was delivered ahead of schedule and on-budget.

> **"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

USE CASE 2

Treatt had been a JD Edwards EnterpriseOne customer since it first installed XE in 2004. JDE is used throughout the business, with 100 concurrent users, and supported internally by a small, but growing, IT team.

Historically, upgrades had been carried out infrequently. In fact, Treatt had waited ten years before upgrading to 9.1 in 2015. However, Treatt was determined to move to the latest release before relocating to their new offices.

Treatt maintains a relatively clean version of JDE E1, with few copies of standard objects or modified objects. However, there were a number of pure custom objects in use.

The Challenge

Partly driven by a planned move to a new corporate headquarters, and as part of a broader digital transformation program, Treatt was looking to upgrade to the latest release (9.2) of JD Edwards EnterpriseOne (JDE E1).

Previous experience of major upgrades suggested the small in-house team would need external support to ensure tight timelines and QA objectives were met.

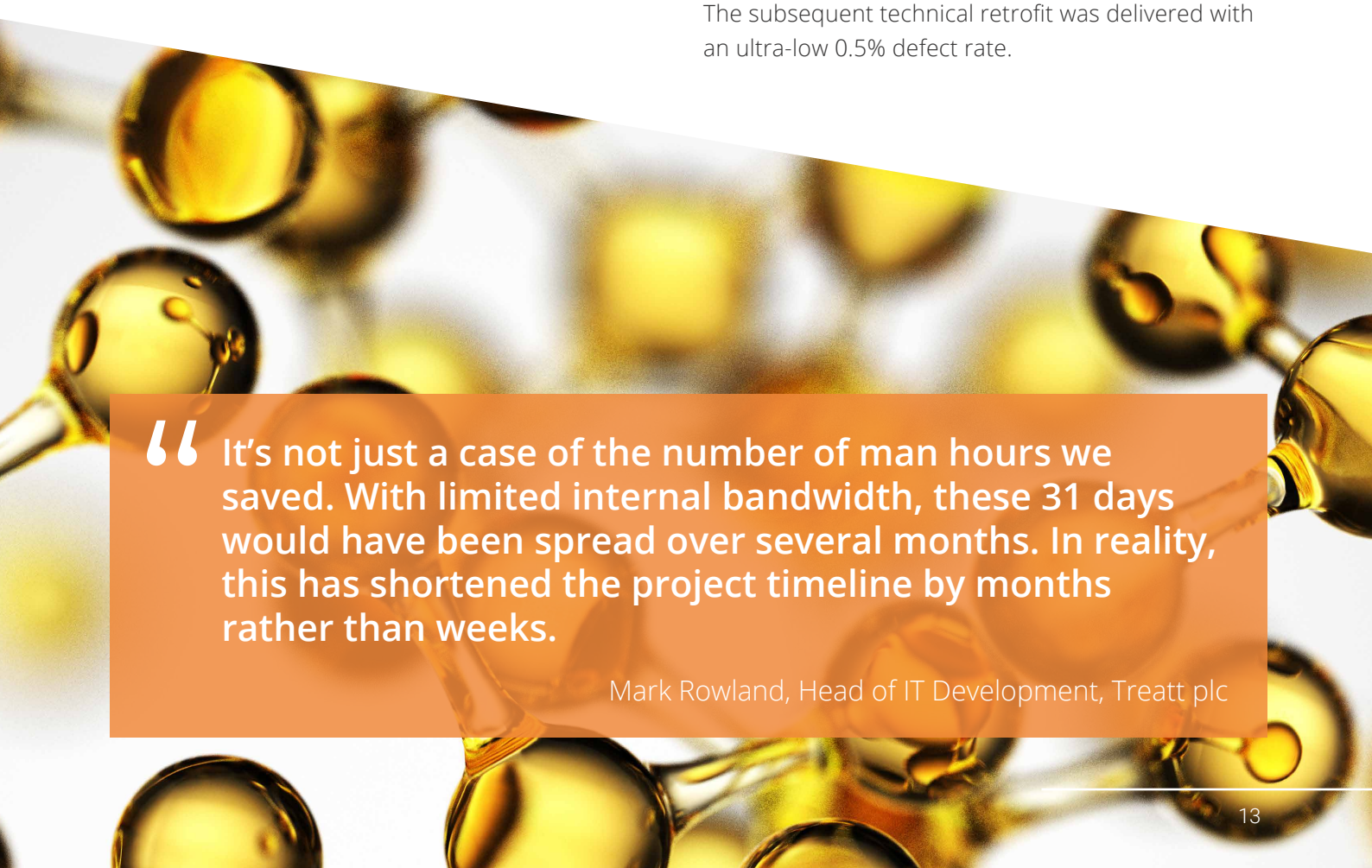
Delivery

Dimension Analyze™ was used to deliver a detailed upgrade audit and effort estimate. This allowed Treatt to undertake a Dimension Professional™ retrofit project to a fixed price and timeline.

Result

Utilizing Dimension Analyze, Treatt was able to save more than 31 days of development over the project lifecycle.

The subsequent technical retrofit was delivered with an ultra-low 0.5% defect rate.



> **"It's not just a case of the number of man hours we saved. With limited internal bandwidth, these 31 days would have been spread over several months. In reality, this has shortened the project timeline by months rather than weeks.**
>
> Mark Rowland, Head of IT Development, Treatt plc

THE ROAD AHEAD

The way in which organizations provision and update software has undergone a radical change over the past few years. The dynamic has shifted away from a major release every 2-3 years to smaller, more frequent updates. To some extent, this reflects the experience we all have as consumers, with small app updates automatically pushed to our devices.

Reduce Cost And Risk

By eliminating barriers to upgrade, you can avoid the self-fulfilling prophecy of disruption caused by lagging too far behind the current code-base. By avoiding an upgrade because you fear it may cause disruption, it ultimately will in one way or another – either because the upgrade effort becomes greater, or because the business is failing to make the most of the new functionality.

Let's address the elephant in the room. 9.2 is here to stay, so if you don't have a plan to migrate in place yet, you should have. Once there, you should then commit to a strategy of staying code-current.

Stay Current

A code-current strategy should be considered a part of the operational costs associated with JD Edwards and a budget allocated each year. Change events should not be restricted to major releases or lengthy projects. By staying close to Oracle's latest code-base, organizations can be more agile and make the most of new features and functionality; saving both time and money in the long-term.

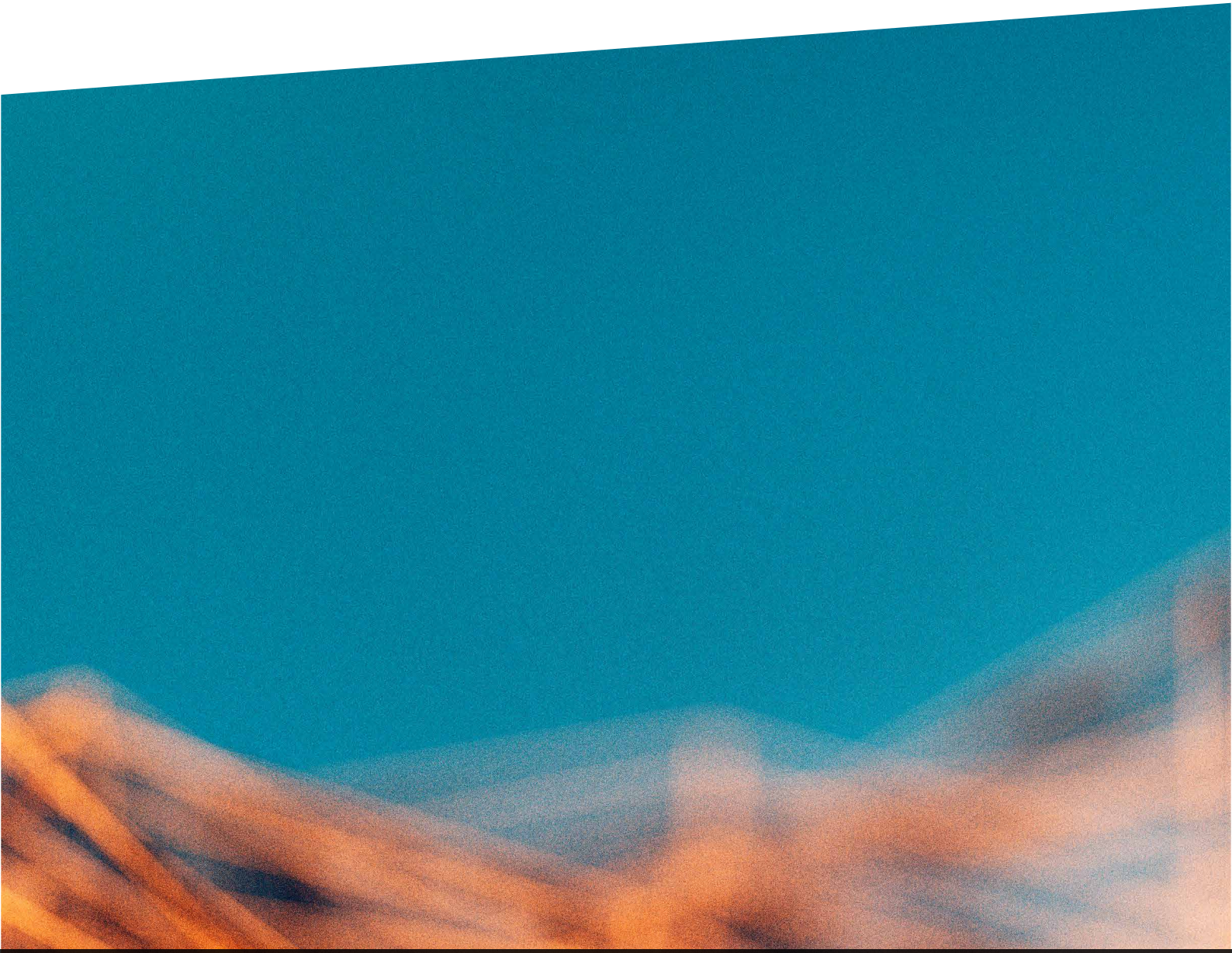
Personalize Instead Of Customize

As new features and capabilities are introduced, companies should consider adopting a policy of personalization, rather than customization. With every code-current project, legacy modifications could be retired, or replaced with new functionality as it emerges.

This approach has the added benefit of reducing your custom footprint over time; making all subsequent change events smaller, faster and smarter.

Adopt Tools And Best Practices

A key component of any code-current strategy is the adoption of tools, policies and technologies that ensure all change event projects are less disruptive; making projects smaller, faster and more frequent. A best practice approach would involve establishing a cadence and rhythm of upgrades that adds greater value to the business and drives down the total cost of ownership of JD Edwards EnterpriseOne.



About DWS

DWS is a leading provider of Oracle JD Edwards EnterpriseOne software services and products.

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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