

Autumn 12 | Issue 48

**Confused by UPK?**

Tim Poynter sheds some light on UPK Professional

**Cheshire Shared Services**

From Systems Integration to Employee Self-Service

**Jonathan Lewis**

Shares on Star Transformations in Standard Edition

# OracleScene

► Serving the Oracle Community

## The Road Ahead For BI Apps

**UK OUG**  
UK ORACLE USER GROUP

**This edition's  
sponsors:**

**excel4apps**  
Excel solutions for Oracle and SAP

**Project**  
integrated business solutions

[www.ukoug.org](http://www.ukoug.org)

An independent publication  
not affiliated with Oracle Corporation

OracleScene **additional**  
DIGITAL **content**

# Upgrade... in 100 days! You're having a laugh?

Well actually,  
let's think about that  
for a minute?  
What do we mean  
by 100 days? What  
do we mean  
by upgrade?

Barry Yelverton,  
CTO,  
Redfaire

**For many JD Edwards customers upgrading has been something we just haven't needed to worry about. The software has been running our businesses successfully through thick and thin, through every business challenge we have faced over the years and it's still working fine! But it is a bit tired looking and some users are beginning to question whether or not it is time for a change. Why is that? Perhaps it's because the new kids on the block are more... well "new", somehow more interesting, and just... shinier! And that's how it starts isn't it? A little trickle and then a flood and the next thing, before you know it, you're being asked to rip out your perfectly good, trusted, reliable work horse and put in SAP when all that was actually needed was a bit of TLC, a new haircut, some new shoes and a scrub down.**

So who's fault is that? Looking around, I don't see anyone else... we took the easy option, of course we did. We needed to keep the business costs as low as possible and over the years the JDE software accommodated that perfectly! That meant we didn't keep the JD Edwards version up to date, not even remotely close to the current release and now we have a fight on our hands to get current and we could certainly do with a bit of support!

Lucky for us, while we've been keeping the lights on, the guys and gals in Denver have been busy, worrying about us for some time and they've come up with a "plan", based on the collective experiences of many previous upgrades and aimed at helping people just like us. The 100 days Upgrade!

Ah yes! But what do you mean by 100 days? We mean "elapsed working days". Oh? Ok, that's not too bad. And "upgrade"? Well it means "technology upgrade". All the collective wisdom points to a phased approach with the first phase being

the "technical upgrade" to provide the foundation for all the new functionality you will then be able to take advantage of in the next phase.

But if I'm going to go through this pain surely it makes sense to do business improvements at the same time, to gain the additional business benefit? Yes... and no... Yes you will do the business change but... in the next phase. It's a phased approach and the first step is to keep the technology upgrade as clean and uncomplicated as possible. So the 100 days gets you through your technology upgrade and also defines the new functionality you will be able to take advantage of in the subsequent phase(s)? Yes. The business sees it as one project, but in phases, and the functionality changes come after the technology foundation is firmly laid down.

Yes but... we've got 100s, perhaps 1000s of customisations, and to be honest, we're not even sure we know how many we really have? Well, to borrow a catch phrase, we have "an app for that"!

There are systems, like Dimensions from DWS ([www.dwsdimension.com](http://www.dwsdimension.com)), that can scientifically assess the scale, complexity and usage of all the enhancements and integrations we have ever made in our JDE environment. They simply compare our production environment against our pristine environment and catalogue the entire list of object differences. Simple. Pristine?... oh yes, I forgot to mention, we do need our pristine environment to be the same ESU level as production ensuring that the comparison findings will only identify custom changes.

Even with excellently documented environments, people are surprised by the results they find, no one has it 100% covered. And you know what? In many cases we can retire up to 30% of our enhancements straight away and

remove them from the upgrade process altogether.

Then once we have our customisations and integrations scientifically catalogued, we can analyse what we really need, what can be retired because it hasn't been used for years, what can be replaced by new functionality and, we get down to the final list of customisations that we really want to retro fit. We can then classify them into buckets: Low (< 1 hour), Medium (1 to 8 hours) and High (more than 1 day). By this time we are even able to go out and get a fixed price for the effort, we can be that accurate. But in the 100 day upgrade programme, the best practice is to make sure this effort does not exceed 45 days of elapsed time, "elapsed" time. Remember things can be done in parallel, so tool up the resources to parallel the retro fit task, otherwise we compromise the plan, and don't be embarrassed to use Partners, they do this all the time!

**So that means we've got our Customisations and integrations nailed, scientifically analysed, excellent!**

So the next part is easy, straightforward data conversion – fully automated, nothing to worry about right? Right. No really, it is actually true! But we have eight years of data and... well we can't really remember that last time we archived anything? What the heck, it's automated, so we'll just convert it all... won't we?

Well I guess that depends on how much time we've got? It's true, data conversion is fantastically well automated now, but it can still take up to 16 hours, or more, depending on our volumes, and if we only have one weekend to cut over, that's a big chunk of our usable time. Also, we're not really going to do the first data conversion the weekend of the live cut over, that would just be silly! We are going to test it first, over and over and over again, until we know exactly how long it's going to take and make sure all the data gets converted perfectly every time. No room for error. So let's ask ourselves again, are

we sure we really need to upgrade *all* that data? Test *all* that data each and every time? Surely there is sense in archiving some of it, say... all but the last 3 years? We can always bring the rest back later, when we have more time or if it's ever needed again? Actually, thinking about it, an archive and purge strategy is probably a good idea – and oh "There's an app for that" too, it's called ARCTOOLS!

Did I hear that we would be testing? Yes, I think I did. This is a project, and requires all the rigour that a business systems project demands – Unit testing, integration testing, performance and scalability testing and, let's face it, user acceptance testing too. The most commonly overlooked of these will be the performance and scalability.

**Who's going to ask 500 users to come in and test a simulated live environment on their Sunday morning, just to see if the system is going to work on "go live Monday"? Not me! Surely there's a better way? Well, yep, "there's an app for that"**

When we get up in the morning we make sure we've had our oats to keep us performing through the peaks and troughs of the day ahead. Well, volume stress testing is exactly the same, and Oracle Automated Testing Suite (OATS), is just the ticket. I'm sure we've all heard of it, but now is the time to look at it. Nothing will kill the reception of our shiny new upgrade quicker than deadly performance from day one. Even if everything else is perfect. Running like a slug, sorry slugs, is an "app killer" not a "killer app". Testing, testing, testing, you have to test it under duress before you let it loose. And guess what, OATS comes with all the JDE test scripts used by DENVER as well. So, not only does OATS nail that risk in our upgrade plan, but it will also be useful in all our other future projects, even non-JDE ones... do they exist? Non-JDE projects, do they? I think so. And I'm thinking "Two birds, one stone", re-usable, neat.

So we've saved the users from losing their Sunday mornings but that does not mean they get off scot free! They still need to be involved in the acceptance testing so we better have some key users ready to test our retro fit customisations as they come down the pipe, not at the end. So we need to be scaled up with enough users to meet that delivery schedule of retro fits and integrations too. Crikey, that reminds me, we also need to train some of the other end users too, all of them, in fact. How are we going to do that? Oh gosh, I hope "there's an app for that"?

**Would you "Adam and Eve it"? (That's UK rhyming slang for "would you believe it")... yes there is and it's called UPK!**

Of course! We should have known, that great new functionality, User Productivity Kits (UPK), that will be available on our new technology upgrade comes complete with 21 JDE modules already done so it can also be "go live ready" for all our users to self-train and this will really supplement the initial training plan to get users used to the new look and feel. Remember, we're not introducing lots of new functionality changes just yet, so they just need to get the new navigation and user interface down and they are off and running. Functional change is coming later. Who'd have thought a few years ago that JD Edwards could do that?

We've arrived! We're ready to go live. We've followed the best practices and going live is essentially a non-event. Fingers crossed. Once our check list is verified and "punched out" there are only a few key tasks required to go live.

We've checked our:

- Functional testing – completed
- Technical testing – completed
- Load testing – completed
- Training – completed
- Last of at least 5 mock upgrades – completed
- Change control – in place
- Internal support – ready to help

Left to do:

- Final business data table conversion
- Synchronise next numbers

### Go for it...

Easy of course, there's more to this than can be put across in a short article like this.

However, Oracle is running free workshops on this, around the world, so get your team booked onto one. If you are going to start planning your upgrade you will need the right team, partner, communication plan and organisation.

There are also great resources available at [www.UpgradeJDE.com](http://www.UpgradeJDE.com) including:

- Oracle product features (Upgrade Value proposition and Statement of Direction)
- Oracle technical catalogue (Programmer's Guide)
- IBM ROI Tool
- Upgrade Champions
- Upgrade resources
- And of course - Upgrade Workshops registration

If you want to get started quicker, call in an Oracle Partner that is certified to run the 100 days Upgrade programme, they do this stuff all the time.

We wouldn't make our own toaster from scratch, there's a video you should definitely watch on YouTube (google: Thomas Thwaites: How I built a toaster - from scratch)

... so why risk doing our upgrade all by ourselves? With a good partner on hand, they can help as little or as much as needed. Try it... or not, but definitely UPGRADE!

There are literally hundreds of JDE customers who have successfully upgraded before. Speak to them. You will be amazed what you can do in 100 days.

## Your Upgrade Plan

How you plan your upgrade project will set the stage for achieving your go live date. By focusing on a technical or a slightly more functional project, your ability to complete your upgrade in 100 days is very good. There are some key concepts from the 100 days Upgrade workshop worth reminding ourselves about:

- Upgrade project types: technical, functional and transformational. To get to a 100 days project, lean towards technical or functional upgrade.
- Projects need to focus on, what Oracle call, the five "rocks": customisations, integrations, data, testing and training.
- Executive sponsors are a must; recruit an executive sponsor from a top business level. The sponsor should not be from IT.
- Likewise, dedicated project management is required.
- Find the right partner – one who has done multiple upgrades
- Pick a project name to communicate across your organisation
- Document your processes for testing (OATS) and training (UPK)
- Connect with Oracle Support Services prior to starting, they need to know you are upgrading
- Leverage Oracle's no cost Upgrade Advisors ■



## ABOUT THE AUTHOR

**Barry Yelverton**  
CTO, Redfaire

Barry is the CTO of Redfaire, one of Europe's leading Oracle JD Edwards Partners. He has been working on JD Edwards for over twenty years and is also the Chief Product Architect of ARCTOOLS, one of the leading data purging and archiving tools for JD Edwards. Barry is a JD Edwards product expert and is a regular speaker at Oracle events worldwide, including Collaborate, and international User Groups including SAOUG and the French, Nordic and Benelux User Groups