



A GUIDE TO UPGRADING GUIDE TO UPGRADING UPGRADING A GUIDE

JD Edwards EnterpriseOne 9.1



In conjunction with:

UK OUG
UK ORACLE USER GROUP

Quest
International Users Group

 **JDE Alliance**
Extending the Value of JD Edwards

dws 

Welcome...

Getting the most value from your JD Edwards upgrade is a shared objective by those who upgrade of necessity, i.e. replacing old technology or applications whose support is coming to end-of-life and by those organizations whose upgrade plans may be more aligned to a strategic business plan.

In either case, successful upgrades require careful planning and proper execution to achieve optimum results. With this framework in mind, we have brought together several experienced business partners from the JD Edwards ecosphere with a two-fold purpose. Firstly, the contents of this guidebook have been selected to identify partners who can assist you in planning and executing a successful upgrade to the latest releases of JD Edwards World or EnterpriseOne. We don't need to remind you that preparing for an upgrade can be a daunting task. Several of the partners represented here have the tools and the

knowledge to help you mitigate risk and "navigate the choppy waters" that can occur with any upgrade. A second aim of the materials in the guidebook is to inform you of opportunities to not only upgrade JDE, but to go beyond just "lifting and shifting" applications from one JDE version to a higher version. Upgrade time is a great time to evaluate transforming your operations. Upgrade planning that includes looking at your current business applications and processes for opportunities to improve those processes, can yield even greater benefits and cost savings potential.

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to the UKOUG and Quest Upgrade Guidebook

A word from our partners

Thank you for allowing us to share this information with you. Our main value proposition is this - we want to extend and enhance your investment in JD Edwards applications by making your upgrade deliver on that investment. If you use or support JDE ERP applications, you are likely very familiar with the host of complementary solutions that exist to address the requirements of your JDE environment, your industry and your business in particular. JDE partners represented in this guidebook bring you many of those tools and solutions as we are companies with long histories of successful implementations. Our companies have a combined installed base of over 1,800 clients and 100+ years of JD Edwards experience, making us uniquely qualified to address your needs. You can rely on us to deliver innovative products, solutions and services as solid, stable and trusted business partners.

Value is at the core of what we do

We offer you the assurance of knowing you can team up with individual JDE partners that can help you meet your companies demand for world class support when planning and executing your upgrade and also provide the opportunity to add complementary solutions that further extend, enhance and protect your investment in JD Edwards. As seasoned practitioners in our respective areas of focus, our tools and solutions do not require you

to become an expert in the areas of business where we have already built solid business practices and expertise. We can act as an extension of your organization delivering additional value to you.

One more note on value: as members of UKOUG and Quest, we are committed to work with these JDE user groups to provide their membership additional opportunities to learn about best of breed solutions for everything from *real-time reporting, security and compliance, automated data collection, application integration, business process automation, data purging and archiving and application analysis*. We participate regularly in events sponsored by UKOUG and Quest. Many of the events we sponsor cost members nothing to attend, but deliver great value. And we support local user groups with sponsorships, presentations and resources to drive attendance to their own unique events.

So, please review the examples in this guidebook of how we have helped other JDE clients and how we can assist you. Our core competencies can help you address upgrade challenges and solve business process challenges by better utilizing the JDE applications you have already invested in. We believe that there is no substitute for experience. Let us demonstrate how we can help you can “put JDE to work” in new, more productive ways.



“We did it all in a weekend, which would have been impossible without ARCTOOLS”

DBG Canada supplies the auto, military and consumer goods industries, with plants in Canada and Mexico. Using JD Edwards since 1998, they had never purged.

DBG had over 70 million F0911s, 4 hour MRP runs for Canada and 8 for Mexico, and a “daily backup” that ran over 24 hours. Their upgrade from 8.10 to 9.1 included a server farm and virtualization. Hardware arrived in March 2013. The upgrade was scheduled for November.

DBG realized the data conversion would run longer than a weekend, idling plants and over 700 employees. DBG considered purge and archive.

ARCTOOLS was installed in August – only 10 weeks before go-live – implemented vanilla and in parallel with the ongoing upgrade. They ran multiple purges, following the recommended scripts.

ARCTOOLS successfully purged many years’ data. The analyses each ran in minutes. The purges clocked at millions (up to 40 million) rows per hour. The ARCTOOLS implementation was a big success. The upgrade was successful, on time and without plant downtime.

In addition to avoiding the upgrade crisis, DBG realized many other substantial benefits from ARCTOOLS: MRP run times dropped to an hour each; “daily” backups ran in just a couple hours; DR improved substantially due to faster backup/restore; noticeable improvements in run and response times, and; benefits that propagated to their many test environments.

Even absent plant-idling conversions, any JDE shop looking at an upgrade can get substantial benefits from ARCTOOLS. As Julian said:

“When you’re doing an upgrade project and you unveil something new to people, before they get to ‘hey this is new, this is cool’, they are going to try what they know already. If it’s slower than what they had before, then in the first couple minutes it will kill your project. They haven’t even gotten to the ‘whiz-bang’ stuff. If they try the new system and it’s not faster it can really kill adoption.”

**Join over 400 JDE customers -
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T +1 508 435 8243 (USA)
T +353 (0)61 503 108 (EMEA)
E sales@arctools.com
W www.arctools.com

ARCTOOLS[®]
ARCHIVE INTEGRITY



KEY FACT ++

Before your users test the new JDE functionality, they will try what they do a hundred times a day. Even if you don't *have* to purge before your upgrade, the performance benefits can generate user excitement for the JDE upgrade.

***Go...Faster.
Without an
upgrade!***



“We can now unload a container in two hours versus the two days it took us before RF-SMART”

Spyder Active Sports, Inc. distributes specialty ski wear and is the largest ski-specialty brand in the world. With RF-SMART’s mobile solution, they significantly increased their supply chain efficiency.

RF-SMART® is the #1 global leader in mobile (RF) data collection solutions for manufacturing and distribution. An Oracle Platinum Partner, RF-SMART supports key inventory and supply chain management transactions for both JD Edwards EnterpriseOne and JD Edwards World. With RF-SMART adding advanced functionality to fill the functional gap between a simple RF system and an overly-complex WMS, our solution offers more than 100 flexible and proven workflows for:

Manufacturing

By automating the collection, entry and validation of manufacturing-related data, RF-SMART streamlines manufacturing processes, improves productivity and provides a number of benefits, including: Real-time visibility into consumption, materials, and labor; manufacturing data accuracy up to 100%; and the flexibility-of-use with nearly all hardware - from traditional handhelds to the latest technology, including the Android, Surface, iTouch and iPad.

Distribution

RF-SMART’s data collection functionality reduces costs, improves productivity and helps companies achieve near 100% inventory and picking accuracy. Additionally, our customers are able to enhance productivity by up to 40%, gain complete visibility of products and activity from the receiving dock to ship confirm,

provide superior customer service, and meet labeling and other compliance guidelines.

Automated Data Collection in the Cloud

Our deep experience in logistics and supply chain processes, mobility and JD Edwards enables our team and our network of partners to deliver a level of quality, performance and value that is the gold standard for JD Edwards mobile solutions. This includes our latest RF-SMART Cloud Solution, which provides a lower Total Cost of Ownership, which induces a lower consumption of capital expenditure; and, as important, our solution helps free up the customer’s IT Team to focus on the critical areas that will move their business in the right direction.

By providing employees with the RF-SMART tools and information they need to be accurate and productive, companies can achieve and maintain “one version of the truth” for their inventory data, while significantly reducing retail chain execution costs.

For more information, visit www.rfsmart.com.

T +1 (904) 399 8500 (USA)
T +44 (0)7800 772025 (EMEA)
E info@rfsmart.com
W www.rfsmart.com

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KEY FACT ++

RF-SMART is always looking forward: In fact, 15% of all sales revenue goes to our Research & Development Team to ensure our customers are experiencing the most leading-edge and functional solution on the market.



Sinclair International Maintains Data Integrity in Upgrade to v9.0 with InsightUnlimited

Sinclair International provides customers across the globe with fruit labels and labelling equipment. With the help of InsightUnlimited Sinclair International was able to migrate from EnterpriseOne Xe to v9.0 with only four hours of system downtime

The Challenge:

Sinclair International had been using JD Edwards EnterpriseOne Xe for 10 years and had complex data stored across its various business functions, in various currencies and formats. Upgrading to v9.0 was always going to be a high visibility project. Finding a tool that would allow the project team to run an extensive range of data integrity reports and checks before going live and proving to auditors that the data in both systems matched were big upgrade concerns. Another worry was downtime as users wouldn't be able to access the system until after all checks were complete.

"It was really important that we chose a reporting tool that didn't have a multi-stage process or required intermediate processes. We needed a tool with live and direct access to data in both Xe and v9.0 and could run comparison reports between the two data sets", said Adam Pryke, IS Manager, Sinclair International.

The Solution:

The InsightUnlimited solution could easily switch between Xe and v9.0 and its built-

in data checking functionality meant that discrepancies could be detected, fixed or accounted for as and when they occurred minimising downtime.

The Benefits:

The InsightUnlimited pre-upgrade integrity reports ensured that only accurate data was migrated to v9.0 reducing the overall cost and length of the project. The post go-live reports proved that the data in the two systems were in sync which would have been impossible to do without a tool that could run the same report against different versions of JDE. The upgrade started on a Friday afternoon and the system was ready to use on Monday morning - a total downtime of 4 business hours!

"We needed to be able to build data integrity reports late in the day with no additional costs. It wasn't until towards the end of the cycle we realised the value of having a tool that could run pre and post go-live reports. Fortunately we had InsightUnlimited," concluded Adam.

T +44 (0)845 467 4448 (EMEA)
E info@insightsoftware.com
W www.insightsoftware.com

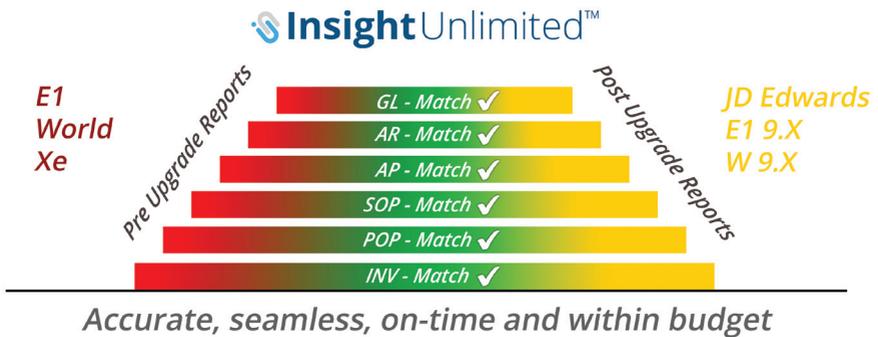


About InsightSoftware.com:

Since 2000, InsightSoftware.com has been committed to developing software to help JD Edwards customers solve their biggest productivity challenges. Our InsightUnlimited solution works directly with ERP software, in real-time, providing end users with a fast, easy way to report, budget, and reconcile. Today, our award-winning software is used by tens of thousands of people from a wide range of industries all over the globe.

KEY FACT ++

ERP upgrades/implementations have only a 7% chance of coming in on time, on budget, and providing satisfying results... meaning the other 93% are failures or challenged projects.



Supercharge your JD Edwards Upgrade and Improve AP Processes with DocuSphere

“The initial deployment of this solution was so successful we expanded it to automate our capital expenditure requests, and are automating other processes as well.” -- FirstGroup America

The Challenge:

Are you faced with a Functional or Transformational upgrade from JD Edwards World or EnterpriseOne? Have you been tasked with showing more value to the business from your upgrade investment? This can be a golden opportunity to bring your new ERP and old AP business processes to a best-in-class status while making the transition to a more functional process less of a challenge.

The Solution:

DocuSphere® is the perfect answer for business process transformation. DocuSphere All-in-One for AP is an Oracle Validated Integration that can be easily deployed into your new JDE environment. Adding new functionality to accounts payable is accelerated by our use of standard interfaces, pre-built workflows and a rapid implementation methodology bringing benefits from day one.

The Benefits:

Many benefits can accrue from automating AP when you upgrade. Here are a few key advantages, including - **automated workflow** for invoice **approval routing and coding**, **easy access** to documents via a 100% **web-based and mobile-enabled solution**, **visibility** to all stages of a supplier invoice and supporting documents from receipt to payment, easier

on-boarding of new vendors through a new vendor approval workflow and vastly **lower cost-per-transaction**.

DocuSphere

Founded in 1993, DocuSphere's entire focus is on the development, enhancement, maintenance, implementation, and support of its own DocuSphere All-in-One solution for accounts payable automation. We deliver “The DocuSphere Difference: The preeminent connected, business-driven AP automation solution – delivered by experienced people for a fixed fee.”

Our seasoned professionals are skilled in ERP applications such as accounts payable, sales order processing, billing and shipping. We've assisted mid-size to large multinational organizations in a wide variety of industries, in locations across North America and around the world.

The combination of DocuSphere's automation solutions and consulting expertise facilitate maximize return on investment and help quicken payback from the purchase and implementation of workflow automation.

“The solution generated AP savings and benefits with payback of less than 12 months!”

T +1 (419)-872-1930 (USA)
E sales@docusphere.com
W www.docusphere.com



KEY FACT ++

The DocuSphere Difference

DocuSphere's All-in-One for JD Edwards AP is an Oracle Validated Integration. And our Rapid Deployment Methodology speeds the implementation process and significantly reduces the time-to-benefit.



Upgrading to JD Edwards EnterpriseOne 9.1: Why Security Matters

Whichever version of JD Edwards you're currently using, your upgrade to EnterpriseOne 9.1 is a major project.

Although it's also a great time to review security, many IT organizations decide to leave this out of the main upgrade project as they fear it would add significant workload and complexity and therefore delay the go-live date. Surely it's best to get the system up and running first, then sort out the security afterwards?

BIG mistake!

Delaying the security work could actually incur unforeseen costs and unnecessary workload that can be avoided by including it in the main upgrade project.

Increased risk of fraud

You almost certainly want to use new functionality in 9.1. Unless you ensure that access to new objects is appropriately secured and segregated, users may gain unintended access that enables them to commit fraud. Although we tend to feel it won't happen to us, analysts' reports show that fraud continues to rise, incurring heavy costs in terms of actual losses and damage to reputation.

Disruption to users

If some processes are re-engineered during the upgrade and the security isn't reworked to match, after the go-live you may find that some users can no longer access objects that they

need – causing disruption to operations and a deluge of calls to the helpdesk.

Duplicated effort and prolonged risk exposure

New productivity tools empower you to create Task Views very efficiently, then with a few extra clicks you can generate matching security and apply it to the appropriate Roles – all within a single screen. Tackling security in this way during the upgrade cuts the overall effort needed and delivers robust security from the go-live.

It may be 'now or never'

Delaying the security work may mean that it never happens; let's face it, there's always a host of other projects that seem more important until either:

- something goes wrong (research shows that most companies only improve their controls after suffering from fraud); or
- the auditors step in and force your hand.

Here's the good news

Whether you want to keep your current security and bring it into line with 9.1 or to restart from scratch, now you can implement robust, sustainable security as part of your upgrade without escalating the workload or holding up the go-live – adding even more value to your upgrade.

T +1 303-256-6630 (USA)
T +44 (0)1372 700852 (EMEA)
E sales@qsoftware.com
W www.qsoftware.com

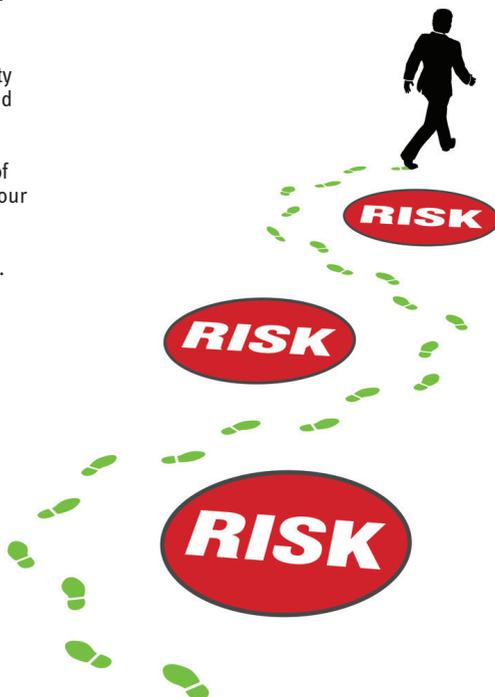


Our easy-to-use tools allow you to:

- automatically generate security from your Task Views for rapid implementation
- identify and resolve Segregation of Duties conflicts and Sequence Manager issues before they cause issues in your live system
- reduce the ongoing workload of security management, compliance reporting and preparing for audits.

And if you want an accurate assessment of your security as you prepare to upgrade, our Audit Service can rapidly analyze its effectiveness, identify vulnerabilities and make recommendations for improvement.

Call +1 303-256-6630 (USA) or +44 (0)1372 700852 (UK/EMEA), email sales@qsoftware.com or visit www.qsoftware.com to find out more.



KEY FACT ++

Fraud is a Constant Threat

PWC's 2011 Global Economic Crime Survey found that 34% of respondents experienced economic crime in the last 12 months (up from 30% in 2009). 56% said the most serious fraud was an 'inside job'.



Mizuno USA Puts a Little Magic in their Upgrade

Mizuno USA was looking for a way to integrate their JD Edwards EnterpriseOne ERP system with a new Shopatron eCommerce implementation.

They selected Magic xpi Integration Platform (formerly iBOLT) because of its straightforward use, the ready availability of affordable services and because they knew the integration approach used by Magic was 100% upgrade friendly.

The Company:

Mizuno USA, Inc.'s roots stem from its parent company Mizuno Corporation. Mizuno Corporation was established in Osaka, Japan in 1906 by Rihachi Mizuno. Today, Mizuno USA is located in Norcross, Georgia, USA and continues to manufacture and distribute high quality golf, baseball, softball, running, and volleyball equipment, apparel, and footwear.

The Challenge:

Mizuno USA uses JD Edwards EnterpriseOne as its enterprise resource planning (ERP) system. To sell in an online store for consumers, they use Shopatron, a powerful eCommerce system used extensively in the consumer goods industry. Like most eCommerce platforms, Shopatron was an open system but had no way of interacting directly with JD Edwards and vice versa.

The Solution:

To integrate Shopatron orders with JD Edwards, Mizuno USA selected Magic xpi Integration Platform. Magic xpi uses smart technology with built-in Magic adapters and data mappers. Magic xpi initiates a request to Shopatron

to receive the XML. Then it waits, using an HTTP trigger, to receive XML-RPC messages containing the order information. Once received, Magic xpi transforms the XML data and stores it in a DB2/400 table with similar structure and then calls a custom JD Edwards business function to load the data into sales order tables in JDE. Magic xpi for JD Edwards supports the use of JD Edwards BSFNs and z-processes and has earned Oracle Validated Integration status.

“Mizuno’s eCommerce integration kept running with near zero effort when we upgraded from 8.10 to 9.1” said Tim Whitlock of Mizuno USA.

Integration added no time to the upgrade schedule.

To learn more about preparing for your upgrade by streamlining your integration between applications see the webinar “JD Edwards Integration Planning: Upgrade Best Practices” online at <http://bit.ly/15mkCZm>

About Magic Software

Magic xpi Integration Platform for JD Edwards World and EnterpriseOne delivers

T +1 949-250-1718 ext. 259 (USA)
T +44 (0)1344 667000 (UK)
E info@magicsoftware.com or infouk@magicsoftware.com
W www.magicsoftware.com



OUTPERFORM THE FUTURE™

enterprise-grade integration, business process automation, and data synchronization solutions. Implementing a wide range of certified and optimized connectors and adaptors, Magic xpi can integrate leading ERP, CRM, finance, and other enterprise systems.

Magic also provides a simple, agile, cross-platform enterprise mobility solution that helps enterprises mobilize enterprise IT applications, logic and data with native user experience that drive usage - helping enterprises innovate, enhance productivity, and increase profitability in the increasingly fast-paced and mobile world. See Magic Software's mobility solution for JD Edwards here on YouTube. <http://bit.ly/195FjG0>

Magic Software Enterprises (NASDAQ: MGIC) empowers customers and partners around the globe with smarter technology that provides a multi-channel user experience of enterprise logic and data.

For more information visit www.magicsoftware.com. Visit our JD Edwards integration blog at <http://it.toolbox.com/blogs/integrate-my-jde/>

KEY FACT ++

Magic Software is a publicly traded company on the NASDAQ exchange and has achieved Oracle Validated Integration for JD Edwards World and JD Edwards EnterpriseOne.



Reduce your modified footprint by up to 70%!

With effective planning and use of upgrade accelerators such as the Dimension Analyze™ service offered by DWS, then the 100 day upgrade is very achievable.

Since 1998, DWS has been providing software development and technical support to companies who want to customize and extend Oracle JD Edwards EnterpriseOne. Its award winning Dimension Analyze™ service has now assisted customers in Europe, Australasia and North America with their EnterpriseOne upgrade projects.

Dimension Analyze™ is a software led service that enables customers to audit and estimate their EnterpriseOne upgrades to a level of accuracy previously unseen. It has helped to reduce customers modified footprints by up to 70% and then estimate the uplift effort and fix price that uplift effort if invited. In one instance, we calculated that we saved a highly modified customer over \$1m in saved developer upgrade days.

We Analyze...

- Every object
- Every line of code
- Every spec/setting

...Down to a pixel movement level of detail.

- We track, capture and categorize... the net change type and severity of impact on every modified E1 object.
- We grade... every net change that has occurred between the from and to release and at the customers precise ESU level.

- We estimate... every modified E1 object, in man days – down to a minutes' level of detail.
- We fix price... if invited, DWS will fix price the retrofit effort for any customer based on the results of a Dimension Analyze™ run.
- We guarantee... an immediate return on your investment.

Typical Questions from Upgrading Customers

- How confident am I that my modification documentation is complete and 100% accurate?
- Can I get hold of all the developers and consultants originally involved in my JDE implementation to help me work out what all the mods are or should be?
- In cases of incomplete documentation how confident am I in the memories of those people originally involved in my JDE implementation to give me an accurate and 100% complete list of mods?
- How certain am I that no mistakes have been made – and that undocumented modified objects don't exist in my system?
- Do I believe that the standard JDE Modifications Report shows me where ALL my modifications exist in the system?
- Do I know what level of effort is involved in uplifting the modifications made at my current release to the new target release?
- Do I know how many resources I will need and for how long?

T +44 (0)1494 896600 (UK)
E sales@dwsconsultants.com
W www.dwsconsultants.com



Dimension Analyze™ mitigates the risk of all these uncertainties by using a structured and tools-based approach, saving you time and money.

“Lafarge engaged DWS to perform an audit of our heavily customized North American JDE 8.9 environment in preparation for an upcoming migration to a global template of ERP built in JDE 9. Although we maintain a large catalogue of technical documentation for these customizations, we valued the opportunity to have a fresh, outside perspective on these items. The final deliverables confirmed assumptions we had long held while providing additional detail to enhance those assumptions. In addition, we were enlightened to several surprises that the DWS process uncovered that has helped us reduce risk and cost in our migration planning. I would not start planning a future upgrade or migration without first consulting DWS.” Director, Application Architecture, Lafarge.

DWS's portfolio of upgrade services helps customers to find their way through the challenges of a typical upgrade. Join our many worldwide customers in using the

leading Audit and Scoping tool in the JDE marketplace.

To find out more, visit our website – www.dwsconsultants.com – or contact us on +44 (0)1494 896600 or at sales@dwsconsultants.com



KEY FACT ++

DWS have analysed in excess of 86,928 objects representing 25,731,139 lines of code/spec. Our clients have an average of 2,716 modified objects, which we reduce by up to 70% - saving, on average 228 developer days per client.



Quest is the **HOME** for JD Edwards

The Quest community includes
2,200+ JD Edwards users from over
3,200 companies

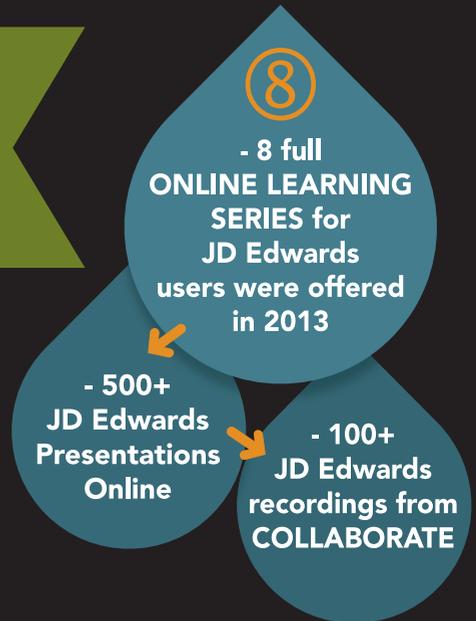
Network with:

- **30+** JD Edwards SIGs
- JD Edwards users in
over **38** countries

"Oracle's customers who were members of user groups are more satisfied with their Oracle product than customers who were not members... The user groups provide learning, networking, and support systems to assist their members.

Whether it be from conference experiences and networking opportunities, online education efforts, or user group infrastructure... user group members take full advantage of the user group offerings to do their jobs better."

- Mike Riley, Oracle Magazine 2012



GET YOUR **2014** MEMBERSHIP READY!

Renew your membership today! Not a member? Join now! Quest members receive **unrestricted access** to all online content and networking opportunities. Members will also receive registration discounts to **COLLABORATE 14** and **JD Edwards INFOCUS 14**. Find out more at bit.ly/QuestMemberBenefits

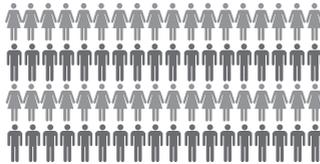
UK Oracle User Group
Membership

Serving the Oracle community

We could tell you how great we are,
but we prefer to let our members
tell you instead.

OUR MEMBERS

8825
member contacts



WHY PEOPLE JOIN UKOUG

97
percent
of members would recommend UKOUG membership to other Oracle users/partners



...find solutions to their Oracle problems



...meet other Oracle professionals



...to connect with other people



...raise their professional profile

QUALITY OF OUR EVENTS

94%

Rate our conferences as good, very good, excellent



91%

Rate our SIGs as good, very good, excellent



Interested in membership?

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