

## TOP 10 TIPS PREPARE FOR YOUR JD EDWARDS WORLD UPGRADE

Upgrading your JD Edwards World system offers a tremendous opportunity to leverage new software functionality and technology delivered by Oracle. Based on WhiteLight Group's proven track record and expertise in performing system upgrades, this data sheet offers ten specific tips that will help you prepare for a successful upgrade.

### 1. GAIN AN UNDERSTANDING OF THE LIFETIME SUPPORT POLICY

- Oracle's Lifetime Support Policy defines a predictable pattern for product support
- Incorporate the Lifetime Support Phases in your strategic planning for future system upgrades such that you remain relatively current and also protect your ability to migrate to Oracle Fusion Applications in the future
- Oracle continues to deliver additional value in each new JD Edwards release and in your ability to connect to other Oracle products

### 2. IMPLEMENT GENERAL HOUSEKEEPING PROCEDURES

- Implement procedures to help keep the system 'clean' prior to the upgrade (unnecessary interactive or batch versions, message queues, completed workflow tasks, media objects, old CNC packages)
- Formulate a data purge strategy and utilize built-in data purge programs or a 3<sup>rd</sup> Party Data Archiving system to reduce the size of the data base
- Utilize the numerous JD Edwards integrity reports to help ensure data consistency

### 3. EXPLORE TRAINING AND REBRANDING OPPORTUNITIES

- View the upgrade as an opportunity to provide additional JD Edwards system knowledge to the users
- There may be significant knowledge gaps about the current release, as well as the new release depending on how much time has elapsed since training was performed
- Validate existing training materials, enhance as necessary, and organize them so that they may be leveraged for the current upgrade, as well as future upgrades

### 4. BASE THE BUSINESS CASE ON VALUE TO THE ORGANIZATION

- Base the upgrade business case on the additional value that JD Edwards may provide the organization as opposed to a reaction to Oracle's Lifetime Support Policy
- Elements of the business case should include the magnitude of change to the organization, opportunities for increased efficiency, infrastructure changes, and the level of effort required by the organization
- Identify opportunities to reduce system complexity to reduce future upgrade costs

### 5. RESEARCH YOUR TECHNOLOGY ALTERNATIVES

- Pay careful attention to Minimum Technical Requirements (MTR) to ensure hardware and operating system compatibility
- Reference Oracle Support document 1076951.1 Master Note for JD Edwards World Tools and Technology MTR
- Investigate options if there is a desire to migrate to a new technology alternative

### 6. RESEARCH THE IMPACT OF THIRD PARTY APPLICATIONS

- Evaluate integrations to 3<sup>rd</sup> party applications in an effort to assess compatibility with the new JD Edwards release
- Determine if the 3<sup>rd</sup> party vendor provides certification to JD Edwards World
- Review all available documentation in an effort to confirm compatibility prior to system testing

### 7. PLAN, PLAN, PLAN SO THAT YOU WILL EXECUTE FLAWLESSLY

- Establish a culture that the upgrade is a true business initiative and will require planning, resources and a methodical approach
- Clearly define the scope of the upgrade and the level to which new software functionality will be reviewed and incorporated into the new system
- Clearly define an object and environment strategy, data conversion strategy, and clearly communicate to the organization

### 8. CATALOG THE "GOLDEN NUGGETS"

- Learn from other organizations who have preceded you in performing the upgrade-begin to catalog their words of wisdom or "Golden Nuggets" such as:
  1. Determine how UDC codes will be migrated to the new environment
  2. Many systems require application settings review for new options
  3. Many data conversions require special instructions which often include manual data setup and review

### 9. UTILIZE AVAILABLE RESOURCES

- A plethora of materials are available to assist you in your upgrade planning and execution
- Reference Oracle Support document 274.1 JD Edwards World Upgrade Advisor for access to a variety of Oracle documents, online value proposition tools, and technical catalogs (listing of database changes)
- Take advantage of user group events and documents to further educate yourself

### 10. GET CONNECTED AND STAY CONNECTED

- Build your network of individuals who may be able to offer you support or perspective
- Proactively seek information from Oracle and user groups such as Quest
- Proactively participate in webinars, user conferences, or other events which may provide you with more information about JD Edwards World