

Archiving Eases JD Edwards EnterpriseOne Upgrades

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EI Editor's Note: *Can EnterpriseOne upgrades be painful? Does having a tooth pulled hurt? There are ways to ease the pain of an upgrade (we can't help you with the tooth); one of those ways is through implementing a data archiving solution. Princeton Softech is JDEtips' newest Software Solutions partner, specializing in data archiving software for JD Edwards® EnterpriseOne systems. Princeton Softech manager Bryan Vogus joins us to provide some food for thought on how a data archiving can help streamline your upgrade process, including some tips on what to look for when selecting a data archiving solution, plus the benefits of archiving before or parallel to your upgrade.*

Mission-critical ERP and CRM applications, like JD Edwards® EnterpriseOne, represent a substantial investment when it comes to driving your business activities and achieving your revenue goals. To safeguard this investment and remain competitive, you'll need to take advantage of the ever-evolving technology. IT organizations have to make intelligent, and sometimes difficult, decisions regarding whether to upgrade to the latest version or remain with the status quo for some period of time.

As Oracle® continues to anticipate future customer requirements with breakthrough technologies, they also remain committed to ongoing investments in their individual ERP and CRM product lines; in 2006, they introduced their Applications Unlimited program and Lifetime Support policies, which means that there are no forced upgrades to successive application versions or to Fusion Applications. They have since introduced EnterpriseOne 8.12, World 9.1, with EnterpriseOne 9.0 to be released in the near future. In addition, at Collaborate 2007, Charles Phillips' and Lenly Hensarling's keynote presentations emphasized that the future of Oracle's software development lies in an "open platform for integration." They are defining "core objects" or business objects that will integrate across applications using an open standards-base. This is good news for customers who are interested in integrating JDE to Siebel and upgrading to various modules of Fusion, as they will be able to do so without sacrificing their previous investments.

There is a "gotcha"—to obtain the benefits of these changes, customers will need to move beyond Xe to a more current release. For a number of companies, this may be a great opportunity, especially if their current applications and functionality are unable to:

- Reduce operating costs
- Streamline business processes
- Improve customer service
- Connect with global partners and operations
- Increase revenue growth
- Support compliance requirements

Keep in mind that maintaining the fewest number of upgrade versions between your current and future application situations will help simplify your transition to the new software versions—you don't want to jump every time there's a new release just because "it's newer". Another thought to keep in mind is with any upgrade, there is always a data conversion step included as part of the process. The less data you'll need to convert during "go-live", the smoother the upgrade will be. As a recognized best practice, database archiving delivers measurable benefits when it comes to managing application data growth and meeting data retention compliance requirements, not to mention overall improvements to system performance. Current research also shows that many Fortune 500 companies are incorporating archiving strategies as an integral part of their application upgrade process, so you may want to consider adopting an enterprise data management solution that includes database archiving capabilities to further streamline that process.

Selecting Archiving Capabilities

The key is determining what archiving capabilities support your business objectives. Your best bet is to focus on enterprise data management solutions that can:

- Ensure the integrity of the archived data in its complete business context. For example, the archival of a

complete invoice business object would include related sales orders, stock and non-stock items, as well as accounts receivable and other master data needed to fulfill reporting requirements without ties to the production system.

- Manage archives and retention periods cost-effectively and consistently over the full lifespan of your data. The ability to save archives on a variety of storage media allows you to future-proof methods for managing data, based on its business value and access requirements. You can retain access to your business records until the legal retention periods expire and archives can be deleted.
- Manage archive processing using capabilities that accommodate your JD Edwards EnterpriseOne customizations. Also look for capabilities that ensure superior safety, control, job separation, and administration and integration with JD Edwards EnterpriseOne.

Keep in mind that the selected solution must align with your business objectives and include proven database archiving capabilities that can help you ensure upgrade project success.

How Does Archiving Facilitate Upgrade Projects?

On a day to day basis, maintaining and managing large volumes of historical transaction records in the production environment degrades service levels, limits availability, and impairs routine daily operations. Continued data growth also has a detrimental impact on your upgrade project, primarily in the areas of capacity, risk, and cost—imagine what you would lose if a catastrophic failure occurred during your data conversion step. Most importantly, excessive volumes of historical transaction data can cause extended, unnecessary downtime during an upgrade. Consider how much faster your system will be back on line if you're converting just one year of data vs. 20 years of data when upgrading from XE to 8.12 or 9.0. If re-accessing older data is a concern, if you've archived and restored it on an alternate database, you can still re-merge it post-upgrade if needed on to the current system. There's really no downside to archiving, when you think about it.

By archiving historical transactions, you can:

- Reduce the database capacity and IT resources required during the upgrade.

- Reduce downtime during the upgrade conversion by 50 percent or more.
- Shorten the time for iterative testing cycles and refresh activities.
- Improve application performance from the old version to the new version by reducing the online transaction processing workload.
- Shorten database maintenance time for tasks like reorganizations, refreshes and cloning.
- Reduce backup and recovery times by days or hours.

Can archiving be included in an existing upgrade project? The answer is "Yes." First, you'll need to look for a solution that provides enterprise data management and archiving capabilities that will ease the upgrade process, while saving historical data to a safe and secure archive. A good enterprise data management solution should provide the flexibility for managing your JD Edwards EnterpriseOne data before, during, and following an upgrade. After the upgrade, ongoing database archiving (monthly, quarterly or annually) will help manage database growth to keep JD Edwards EnterpriseOne applications operating at peak performance, while your archived data remains accessible. As to which implementation approach offers optimal business value – that's for you to decide.

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Where Archiving Fits In

If you decide to include archiving as part of your JD Edwards EnterpriseOne upgrade strategy, you should consider doing so before or in parallel with the upgrade project in order to get the maximum benefits.

Archiving Prior to an Upgrade – Archiving historical data and removing it from the production environment prior to an upgrade streamlines the database (see Figure 1); only the most active data is converted and migrated to the new environment. Managing less data reduces the risk and downtime that often accompany

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