

Planning Your A9.1 Upgrade –

Project Management Tips and Lessons Learned from an Early Adopter

By Cordell M. Kirk

W Editor's Note: *If you're planning to upgrade to JD Edwards® World® A9.1—this article provides some insight as to how one company, Fike Corporation, managed its recent project successfully. Cordell Kirk reports from the trenches as his company becomes one of the first to “go-live” with this latest release. Cordell's lessons learned offer a glimpse at the non-technical side of an upgrade, the process planning—which he found to be the foundation for a smooth transition.*

Why should we upgrade to A9.1? That's a great question. For Fike, the answer was simple. We have a company policy that states “our commitment is to seek continuous improvement of our products and services”, which includes our business system. If you are like me, the thought of going through a software upgrade brings to mind many things – fear, anxiety, excitement, long hours, improved functionality, and business growth – just to name a few. At Fike, we had last upgraded in January 2004 from A7.3 Cume 10 to A7.3 Cume 14. We worked hard and completed a successful upgrade. Fast forward three years: Fike is selected by Oracle® to be one of the three “Early Adopter” companies to upgrade to the new JD Edwards World A9.1 Renaissance Release prior to the software becoming generally available. We still go through all of the emotions of a regular upgrade, except this time, we have the added responsibility of being on the leading edge of not only a new software release, but also a release packed with changes. By the way, did I mention that we are heavily modified? If you have been through an upgrade, you know and understand these emotions. The purpose of this article is two-fold:

- Share our project methodology approach
- Share some “lessons learned” about the overall process.

Hopefully our story will provide an inside look at our experience as we upgraded to A9.1.

Getting Started

I've been working with JD Edwards World implementations since 1995. Over the years, I've learned the importance of a solid project plan. Having well-

documented tasks, planned over a realistic time line, coupled with a dedicated team of people, makes all the difference in the world. The first thing we did in preparation for the upgrade to A9.1 was to go through a “Health Check” with the help of Oracle/JDE® personnel. The purpose of the Health Check was to have business consultants from Oracle engage representatives of our core functional areas to get their feedback on how the business system is or is not meeting their business needs. From those meetings, the consultants from Oracle were able to provide us with a list of suggested initiatives that should lead to improvements in our core business. This was a very beneficial first step in the upgrade process. It provided the management team at Fike with a short list of initiatives we could focus on in conjunction with the upgrade to A9.1. Our responsibility was to take that short list and make it more manageable. We did that by separating the short list into NOW and LATER categories. The NOW items would be strongly considered as part of the upgrade to A9.1 and the LATER items, while still important, were “parked” until after the upgrade to A9.1.

Going through the Health Check process was a productive and beneficial first step for us.

Lessons Learned 1: Going through the Health Check process was a productive and beneficial first step for us. It not only provided us with an outside/in view of how our user community feels about the business system, but it also helped us establish the core teams that we would be counting on to help with the upgrade to A9.1.

Another step we took to get the upgrade project off the ground was to enlist the help of one of Oracle's business partners to assist with the initial project planning activities. In previous upgrades at Fike, we primarily relied on the expertise and skills of our in-house personnel to “make it happen”. One of the objectives of the upgrade to A9.1 was to reconnect our core users with the ongoing lifecycle of our business system. We wanted our user community to help drive the upgrade.

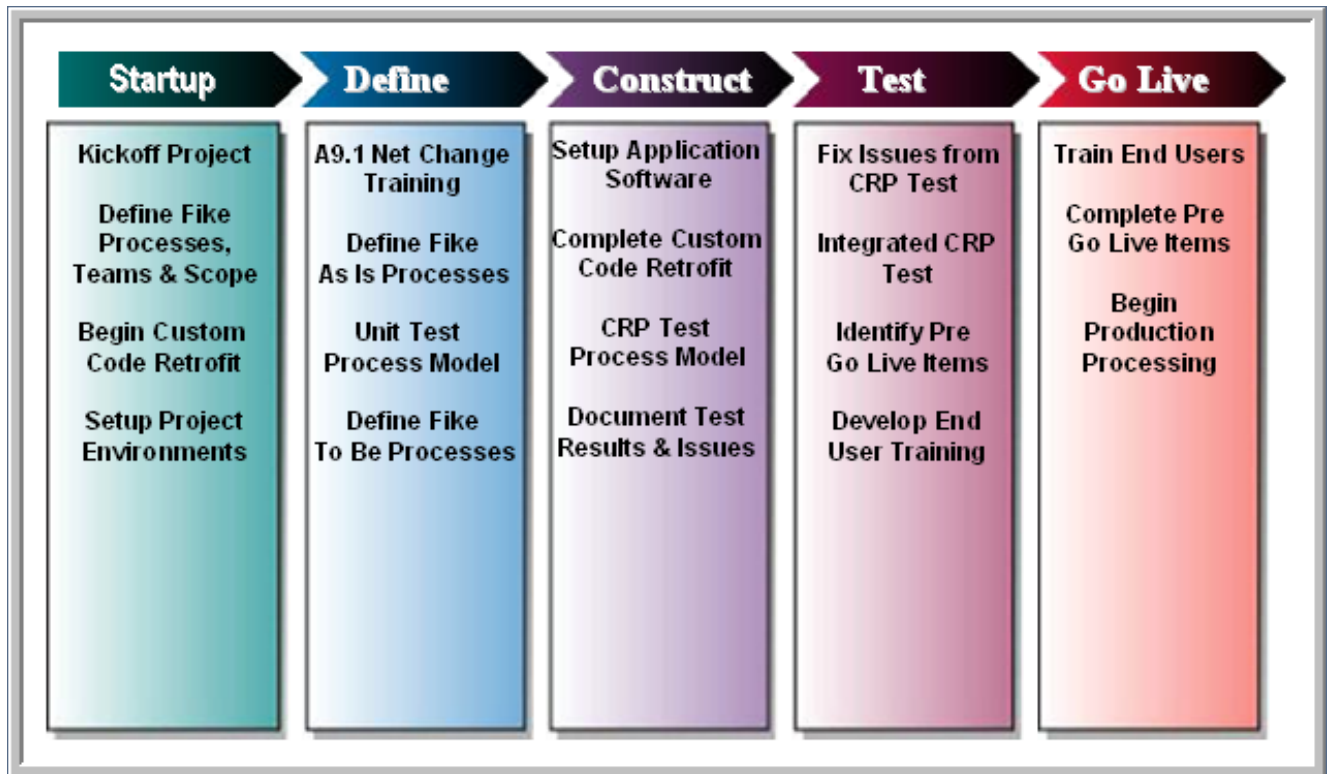


Figure 1 – A9.1 Upgrade Five-Stage Project Plan

We wanted a partnership where we were all invested in the upgrade, instead of just performing the upgrade “behind the scenes” and then flipping the switch to A9.1. We felt the best way to do this would be work with a third-party consulting group to help us accomplish this objective. With the help of our new business partner, we developed and defined a Five-Stage Project Plan. Figure 1 illustrates the model we used.

As you can see from the plan, we didn’t do anything too fancy or complicated. We kicked off our project team orientation in May 2007 and went live on A9.1 over Labor Day Weekend. We gave ourselves four months to get the project completed. We didn’t have time to get too fancy. We had to maximize our efforts and do as many tasks in parallel as possible. Looking back, doing a good job in Stages 1 and 2 of the project helped tremendously in executing Stages 3-5 of the project.

Lessons Learned 2: Defining Fike’s major business processes was tedious work, but it paid huge dividends. The major business processes list was the foundation of the project. We focused our efforts on ensuring that our major business processes were supported in A9.1.

The final step we took to launch the upgrade project involved a “kickoff” meeting. This wasn’t just another

meeting. This was a “big deal” meeting. We put together binders outlining all of the objectives of the project and provided each team leader with all of the materials they would need to engage their extended teams. We divided our teams by functional area – manufacturing, accounting, sales order processing, etc. Each team was also cross-functional by business unit. Our team leaders, all based out of our corporate offices in Blue Springs, were responsible for gathering input and feedback from our business units located outside the USA. This was another tedious exercise, but one that paid big dividends. When our team leaders left the kickoff meeting, they knew exactly what was expected of them and they knew the communication path to use if they needed additional resources or support. My role for this upgrade was Project Coordinator. It was my job to schedule weekly team meetings and provide all project related updates. I was also responsible for all project documentation and served as the liaison between the user community and our business systems group for all project related issues.

Lessons Learned 3: Timely communication is critical to the success of the project. Working with personnel from five business units located throughout the world required teamwork and tons of good communication.

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