JD Edwards Pre-Upgrade Assessment & Impact Analysis

TCS’ Pre-Upgrade Assessment service is an advisory service that gives you upfront visibility into your readiness and the likely issues, both from a functional and technological perspective that may emerge in your planned upgrade. At the conclusion of this advisory service, our recommended upgrade strategy, supported by a roadmap and detailed project plan outline for you the necessary elements, including resource and effort estimates, to make your upgrade a smooth journey.
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Introduction
Many organizations running on older versions of JD Edwards like World-Soft, One-World have customized their current instances to a great extent. The problem magnifies if they have multiple such instances that have undergone non-homogeneous set ups and customizations. High customizations and non-homogeneous existence of instances are leading to high maintenance cost.

These organizations wanting to upgrade are in a dilemma and they have key questions in mind: What strategy should one adopt? Upgrade, re-implement, and consolidate?
- What are the investment requirements?
- What timeline is required for the program?
- What are the technical risks?
- Which infrastructures need upgrade?
- Do I need to buy additional product license?
- What are the issues that seek resolution?
- What process changes are needed for the business?
- What new functionality should be adopted?
- What training is required for users?

TCS brings a solution that is unique because it enables an organization to discover the facts not just for upgrade, but also across instances, take appropriate decisions, reap the maximum benefits from available products, and expedite the upgrade process with reduced cost of ownership.

It supports tool based assessment of existing customizations and effort estimation for retrofitting.

Objective
The basic purpose to carry out the upgrade assessment is to assess the current system state and realize the Gaps based on the following business and technology necessities of the future - Recommend a roadmap to the organization for Upgrade with a better estimate of the investment and Schedule.

Business and Technology Trends for the future Organization -
- Shared Service – Optimize Cost of operations / Remove Non Value add’s and unnecessary complexity.
- Flexible and Hot pluggable architecture integration middle tier – Faster Response to changing business needs / Reduce cost and Time to Operate and Stabilize.
- Opportunity to eclipse custom components and use the new functionalities and features in the new releases.

An upgrade Assessment focuses on the existing state of the Client Technology System and architecture to analyze the lacuna vis-à-vis the future business needs as per Market and economic Trends and Organizational strategy and would recommend a future roadmap for significant business and technological benefits.
Why Pre-Upgrade Assessment
Key Benefits
TCS' recommended approach provides benefits in the following areas:
- Roadmap for the Upgrade Program
- "Must-Do" Functional adjustments (Configuration Changes)
- JDE Code adjustments (Custom Modifications)
- JDE Security adjustments (Modifications to security configuration)
- Shorten the derived projects execution timelines.

Performing a detailed Pre-Upgrade Assessment Study will benefit in the following fashion:
- The project plan determined at the end of this engagement will jumpstart the actual Upgrade Program.
- The new functionality assessment study will serve to shrink the timelines required for the Functional Upgrade Business Blueprint phase.
- The technical details in the Pre-Upgrade Assessment Report can be leveraged to accelerate the Technical Upgrade Project substantially due to the depth of the analysis and by eliminating the need to perform these studies at the beginning of the Technical Upgrade Project.

Upgrade Challenges
Upgrade is a challenging task. It involves assessing challenges in various areas Infrastructure, Technical deployment, application modification.
Approach

Considering the criticality and complexity of the study, TCS suggests the following approach:

**Compare Business Processes**

Early in the evaluation of an upgrade, customers will need to familiarize themselves with the capabilities of the new system and ensure that they are upgrading to a set of applications that will enable them to fully run their business. This process will help them identify and understand any major difference in the flow of the business processes, as well as how terminology has changed from the existing version to the new releases.

**Identify New Features and Benefits**

In addition to comparing business processes, customers will want to understand the features and functionality that are available in the new releases that were not available in their existing product line.

The information will be paired with short statements about the value created by these features. This will help customers identify areas that might benefit their companies and therefore require further investigation.

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**JDE Upgrade Approach and Methodology**

**Approach**

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**Document the Analysis and Findings**

The project team is required to document the final configuration, impact analysis recording the gaps in processes, features, custom components and architecture and resolution of the same in the future release. The record should also mention acceptance criteria after the system has been upgraded, reconciliation measures and might also include information about key decisions that were made.

**Methodology**

The methodology to carry out the Due Diligence exercise is divided in five phases.

- **INITIATE**
- **FUNCTIONAL ASSESSMENT**
- **TECHNICAL ASSESSMENT**
- **PREPARE**
- **PRESENT**

The methodology is described in the schematic below.

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**INITIATE**
- Finalize Plan and identify core team
- Identify Customer driven objectives

**FUNCTIONAL ASSESSMENT**
- Map business process models (followed in current version of JDE) in the target version
- Identify custom components to be eclipsed
- Identify existing business process to be realigned with the target version
- Map any new business requirements in latest JDE
- Identify solution footprint for new requirements

**TECHNICAL ASSESSMENT**
- Map database objects for the custom components in the target version
- Identify the changes required in custom components
- Assess performance impact of the custom programs
- Assess the load on existing Hardware and Network post upgrade-Resizing to be done, if necessary
- Assess historical data archival requirement
- Assess the BCP and recovery plans, modify if required

**PREPARE**
- Prepare Upgrade Assessment Document containing the following:
  - Impact on Custom Objects
  - Eclipse Analysis
  - Integration Fit Analysis
  - Reporting Fit Analysis
  - Existing business process Impact
  - New Solution requirements
  - History data Archival Strategy
  - Performance impact of the upgrade
  - Resizing, if necessary
  - Prepare a high level plan for the JDE
  - Upgrade and deployment roadmap for the new requirements

**PRESENT**
- Final Presentation to Business with detail upgrade execution schedule & Roadmap
- Architecture and New requirement deployment plan
- Benefit Measures and Plan

*Figure 3*
Initiate: In this Phase, a high level understanding of Program Perspective, Platforms and environment architecture will be created. The Detailed Assessment Plan will be prepared along with Session Planner with the Process Owners and IT personnel.

Functional Assessment: In this Phase, impact of the fitment of the new version of JD Edwards will be studies and improvement suggested. Following are the key activities:

- Map business process models (followed in current version of JDE) in the target version.
- Identify custom components to be eclipsed utilizing the new features available in the target version.
- Identify existing business process to be realigned with the target version.
- Identify and Define the process flow for any new business requirements to be incorporated / configured within the target version.
- Map the new requirements in the target version and Identify solution footprint for new requirements.

Technical Assessment: Technical assessment looks at custom objects, Interfaces, performance, architecture etc. Following are some of the major activities during this phase:

- Map database objects for the custom / Interface components in the target version.
- Identify the changes required in custom / Interface components and document the same.
- Assess performance impact of the custom / Interface programs.
- Assess the architectural modifications as per the target version and the load on existing Hardware and Network post upgrade – Resizing to be done, if necessary.
- Assess the BCP and recovery plans, modify if required.

Prepare: During this Phase a detailed Report for Upgrade Assessment is prepared containing the following details:

- Impact on Custom Objects
- Integration Fit Analysis
- Reporting Fit Analysis
- Existing business process Impact
- New Solution requirements
- Architecture Impact due to the target version
- History data Archival Strategy
- Performance impact of the upgrade - Resizing , if necessary

High level plan for the JDE Upgrade and deployment roadmap for the new requirements containing:

- Upgrade Scope and objectives to be achieved for the business
- Upgrade Approach and Methodology
- Timeline and Transition schedule - Tentative
Program Management Model
Infrastructure requirements / Team structure / onsite-offshore model
Security and Quality management Processes

Present: Prepare and Deliver final presentation including:
- Salient points of the Functional Impact analysis
- Salient points of the Technical Impact Analysis
- Recommendations
- Plan
- Approach & Methodology
- Benefit Measurement Plan
- Architecture deployment Plan

Tools for Upgrade
TCS Tools will be used to accelerate and manage the Upgrade project. Tool details are summarized below:

<table>
<thead>
<tr>
<th>Sr. No.</th>
<th>Tool</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Integrated Project Management System (Web - IPMS)*</td>
<td>TCS Tool for:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Project Planning &amp; monitoring</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Risk &amp; Change Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Quality Assurance activities</td>
</tr>
<tr>
<td>2</td>
<td>Ultimatix*</td>
<td>TCS Tool for:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Project creation, accounting, resource allocation,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Hardware requests, etc</td>
</tr>
<tr>
<td>3</td>
<td>JDEImpact*</td>
<td>TCS Tool for Upgrade Analysis</td>
</tr>
</tbody>
</table>

*TCS proprietary tools.
About TCS’ JD Edwards

Companies implementing the JD Edwards solution need to identify an appropriate partner who understands the business and technology and fuse these together to optimize business benefits. TCS has established its’ JD Edwards Practice to address the service requirements of such customers. Backed by its strong domain expertise, TCS offers implementation, upgrade and sustenance solutions across JD Edwards EnterpriseOne and JD Edwards World product lines.

Being a Oracle Platinum Partner and Oracle Global System Integrator Partner, TCS is fully geared to provide you with the support and strategic direction in terms of protecting your current investments and advising on the road map ahead – bringing certainty in your enterprise’s organizational change management and business transformation imperative.

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Tata Consultancy Services is an IT services, consulting and business solutions organization that delivers real results to global business, ensuring a level of certainty no other firm can match. TCS offers a consulting-led, integrated portfolio of IT and IT-enabled infrastructure, engineering and assurance services. This is delivered through its unique Global Network Delivery ModelTM, recognized as the benchmark of excellence in software development. A part of the Tata Group, India’s largest industrial conglomerate, TCS has a global footprint and is listed on the National Stock Exchange and Bombay Stock Exchange in India.

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