



Upgrade Program and Technology Office

UPTO

Overview

The Upgrade Projects and Technology Office

The UPTO team was started in January 2011 to reduce complexity, cost and business disruption challenges of upgrading JD Edwards software.





Upgrade Program and Technology Office (UPTO)

New team formed January 2011

Eric Maikranz

(eric.maikranz@oracle.com)

Jeff Amerine

Barb Canham

Rudy Lukez

(jeff.amerine@oracle.com) (barbara.canham@oracle.com) (rudy.lukez@oracle.com)

Objective:

Easier, Faster, Cheaper
Upgrades



Upgrade Program and Technology Office

UPTO

• ————— •
New Site – New Tools

Upgrade Resources for all JD Edwards Customers



www.UpgradeJDE.com



Product Features



Technical Catalog



IBM ROI Generator



Upgrade Workshops



Technical Catalog for JD Edwards

Replaces Paper Programmer's Guide



- Table changes and additions
- Field names and definitions
- System code organization
- Multiple search options
- Many output options
- Follows eUVP Product Features

ORACLE Technical Catalog

Home Tables System Codes Components **Compare Releases**

JD Edwards EnterpriseOne > Compare Releases

Select a Release From and Release To and the criteria to search by (using the radio buttons).

* Release From 8.10

* Release To 9.0 Update 2

* Compare By Table Name System Codes Component

System Code(s)

- 00 - Foundation Environment
- 00S - Foundation Self Service
- 01 - Address Book
- 02 - Electronic Mail
- 03 - Accounts Receivable
- 0301 - Credit Management
- 03B - Enhanced Accounts
- 03C - Issue Management
- 05 - Time Accounting and
- 0510 - Advanced Time Management

ORACLE Technical Catalog

Home Tables System Codes Components **Compare Releases**

JD Edwards EnterpriseOne > Compare Releases > Review Change Results > 0301

Review Table Changes

Table Description: Accounts Payable Ledger

System Code: 03 (Accounts Payable)

Component: Financial Management

Release: 9.0

System Code(s)	Component(s)	Release(s)
0301	Classification Code 01	Release
0301	Classification Code 02	Release
0301	Classification Code 03	Release
0301	Classification Code 04	Release
0301	Classification Code 05	Release

Find it at www.UpgradeJDE.com

JD Edwards Upgrade Advisors

Organized by Phase

- Evaluate
- Plan
- Configure
- Test
- Implement
- Accept

Step by Step Guide

Detailed content to successfully accomplish tasks

Current News

Multimedia Content

- [OneWorld Xe to EnterpriseOne 9.0](#)
- [JD Edwards World A7.3 to A9.2](#)
- [JD Edwards World A8.1 to A9.2](#)
- [EnterpriseOne 8.11SP1 to EnterpriseOne 9.0](#)
- [EnterpriseOne 8.12 to EnterpriseOne 9.0](#)
- [JD Edwards World to EnterpriseOne](#)

IBM ROI Tool for Oracle JD Edwards

<http://k.kmaone.com/jderoi>

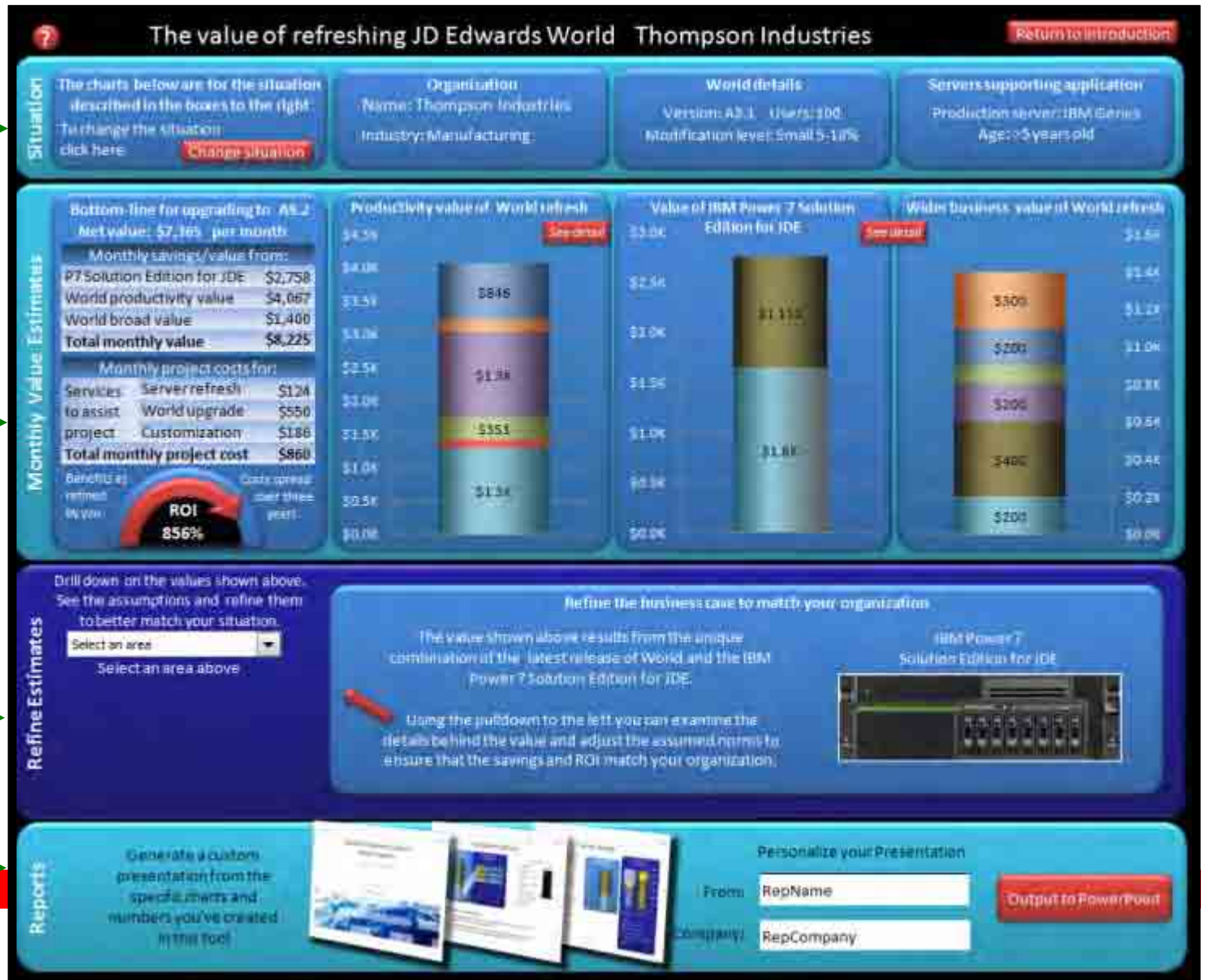
All it takes is four easy steps to an estimated ROI and a professional presentation

1. Input your current situation

2. Immediately see the estimated ROI

3. Revise estimates used in the tool to match your environment

4. Generate a custom presentation





Upgrade Program and Technology Office

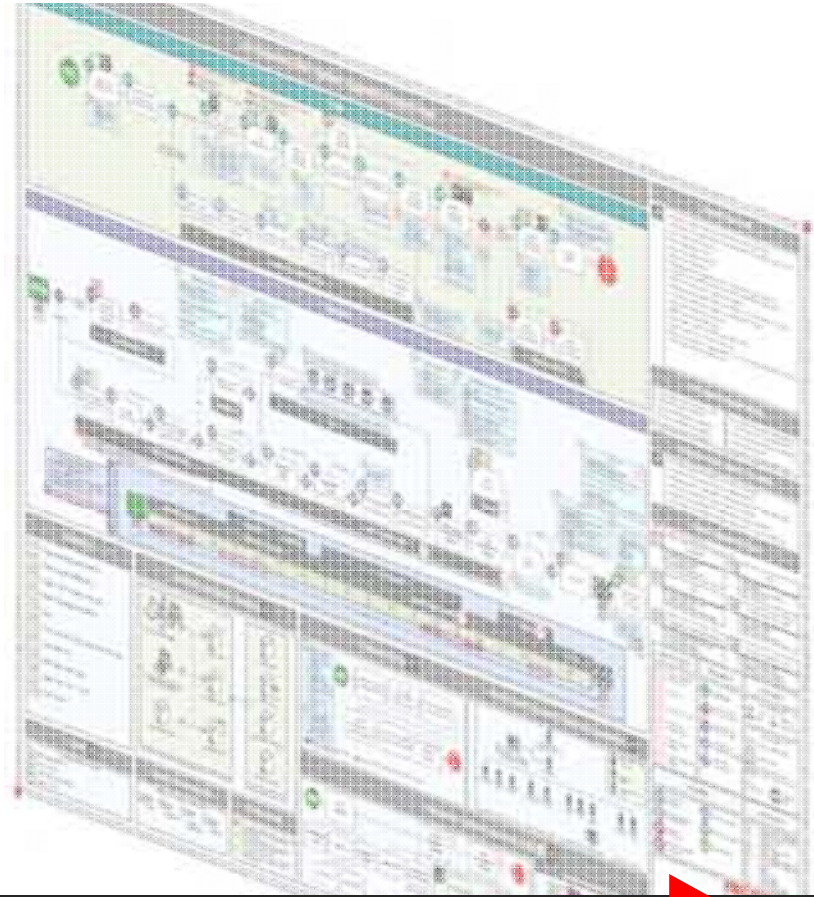
UPTO

● ————— ●
Upgrade in 100 days Workshop

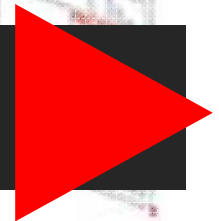
Upgrade Workshop: Defined Process, Best Practices

No cost. Uses Wall Poster with Process, Resources and Tips.

- Upgrade planning process
 - Technical upgrade
- 100 day outline
- Helpful information, testing, technology, and team
- Tips, checklists and resources



www.UpgradeJDE.com



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JD Edwards Upgrade Workshop

Discover the art of the possible. Upgrade to the 9s in 100 days.

March 8th JD Edwards World Upgrade Workshop – Denver, CO

March 16th JD Edward EnterpriseOne Upgrade Workshop – Denver, CO

Sunday April 22nd JD Edwards EnterpriseOne Upgrade Workshop
at Collaborate conference in Las Vegas

Register: <http://www.upgradejde.com/workshops.htm>

This workshop was really eye-opening, especially for those of us still on release Xe. The JD Edwards team tasked with this initiative has done a fantastic job. - energy equipment manufacturing and services USA

Reminded me of a [MythBusters](#) episode. My opinion went from "busted" to "plausible". - life science products/materials manufacturer USA

Upgrade Resources for all JD Edwards Customers

www.UpgradeJDE.com



Product Features



Technical Catalog



IBM ROI Generator



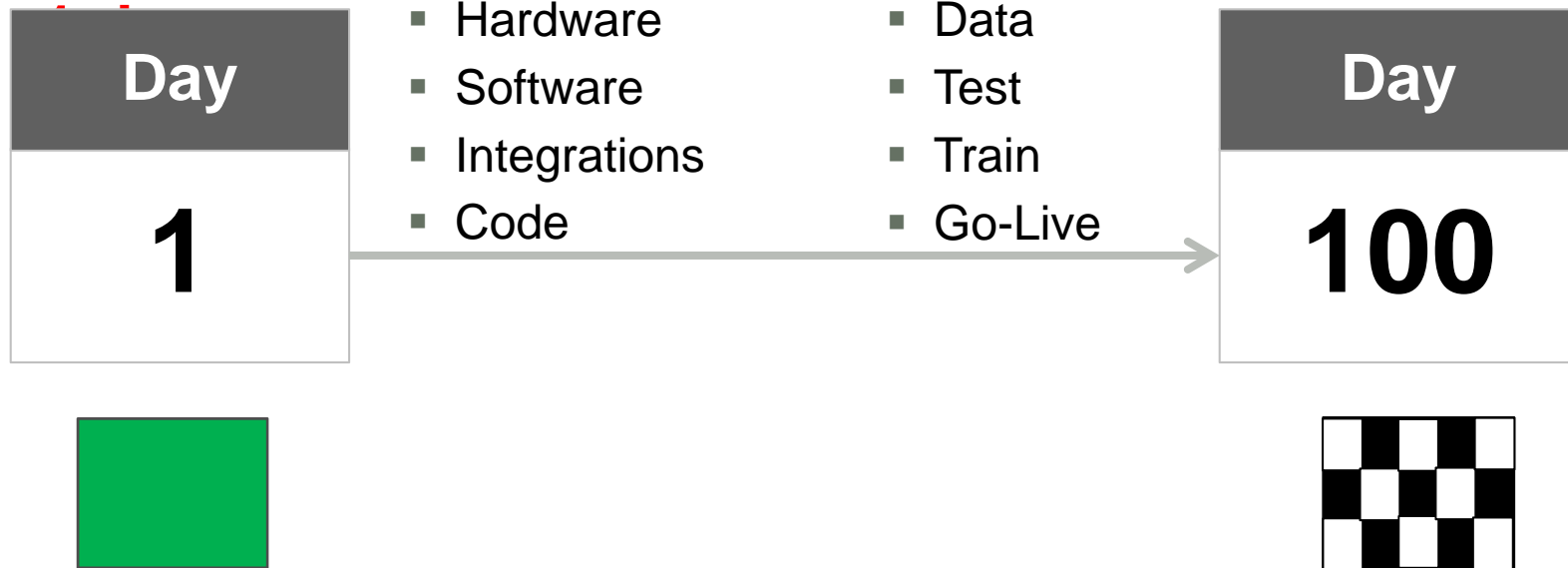
Upgrade Workshops



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Upgrade JD Edwards in 100 Days Workshop

Based on real customers, real experiences. No cost.



Register at  www.UpgradeJDE.com

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Get to the 9's

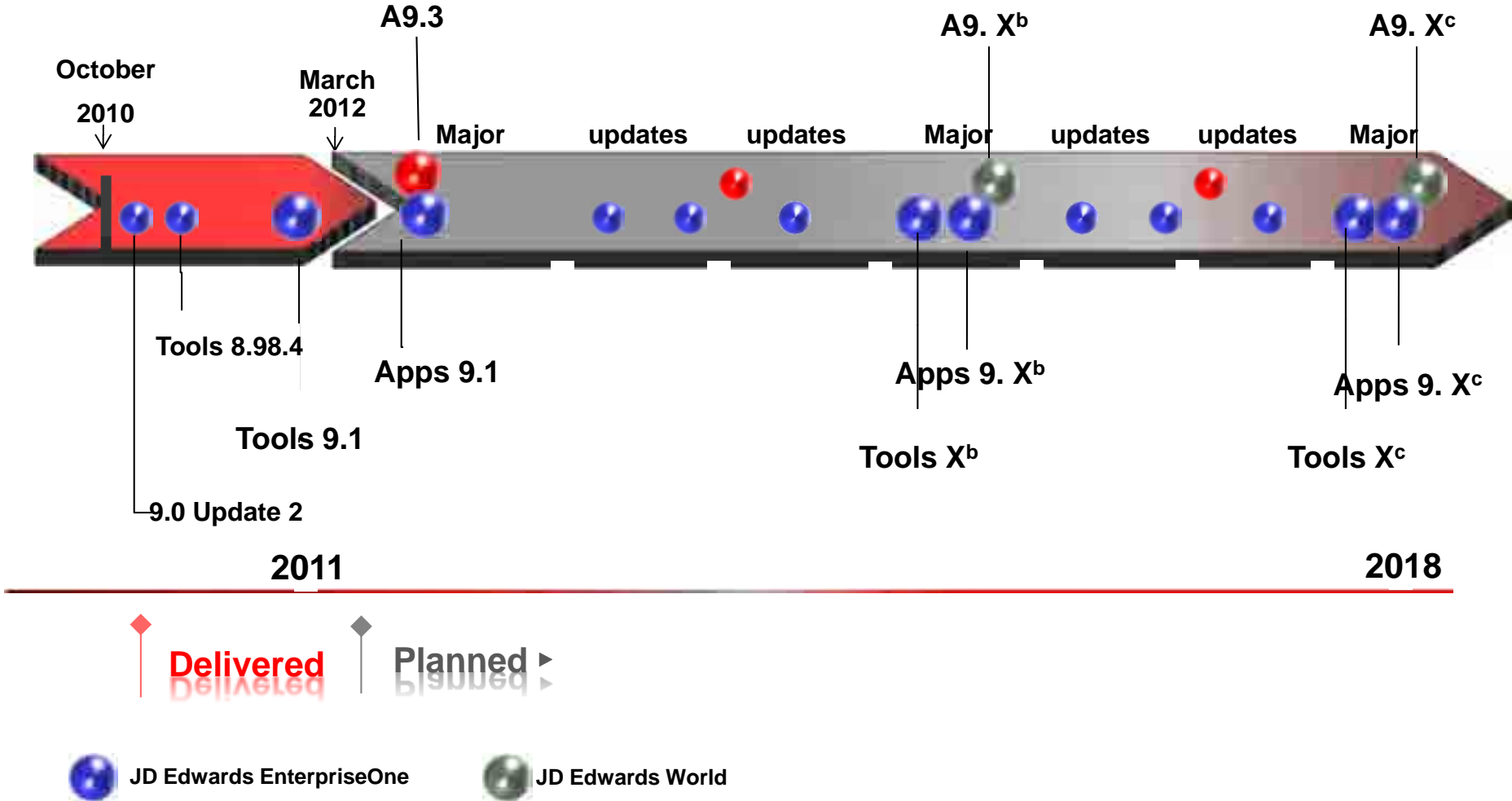
2012: The year of the Upgrade





JD Edwards Product Roadmap

JD Edwards EnterpriseOne and JD Edwards World



Roadmap subject to change without notice. The above is intended or information purposes and may not be incorporated into a contract.

Key Support Dates and Recommendations

JD Edwards EnterpriseOne

Release	Premier Support End Date	Eligible for Extended Support	Oracle Recommends Release	Notes
Xe ERP 8.0	Dec 2013	No	9.0 Update 2	<ul style="list-style-type: none"> Begin Upgrade Project Now New Functionality, Web User Interface, Architectural Changes
8.9	Sep 2008	No	9.0 Update 2	<ul style="list-style-type: none"> Begin Upgrade Project Now Regulatory and Legislative Platform Support, Web User Interface
8.10	Jun 2009	No	9.0 Update 2	<ul style="list-style-type: none"> Begin Upgrade Project Now Regulatory and Legislative Platform Support, Web User Interface
8.11/ SP1	Dec 2009	Dec 2012	9.0 Update 2	<ul style="list-style-type: none"> Begin Upgrade Project Now Maximize Support Low effort
8.12	Apr 2011	Apr 2014	9.0 Update 2 or 9.1 (Planned)	<ul style="list-style-type: none"> Upgrade to 9.0 Update 2– low effort Second option: Purchase Extended Support; Upgrade to 9.1
9.0	Sep 2013	Sep 2016	Stay put or apply update 2	<ul style="list-style-type: none"> Stay Code Current Update 2 extends support by two years
9.0 Update 2	Nov 2015	Nov 2018	9.1 when available	<ul style="list-style-type: none"> Stay Code Current

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Key Support Dates and Recommendations

JD Edwards World

Release	Premier Support End Date	Eligible for Extended Support	Oracle Recommends Release	Notes
A7.3	Dec 2013	No	JDE E1 9.0 or A9.2 Update 1	<ul style="list-style-type: none"> Begin Upgrade Project Now New Functionality, Web User Interface Business Decision – Upgrade to World A9.2 Update 1 or migrate to EnterpriseOne 9.0
A8.1	Dec 2013	No	JDE E1 9.0 or A9.2 Update 1	<ul style="list-style-type: none"> Begin Upgrade Project Now New Functionality, Web User Interface Business Decision – Upgrade to World A9.2 Update 1 or migrate to EnterpriseOne 9.0
A9.1	Apr 2012	Apr 2015	Stay put or move to A9.2.1	<ul style="list-style-type: none"> Easy Upgrade to A9.2 Update 1 New Functionality Second Option – Purchase extended support then upgrade to A9.3 (Planned)
A9.2	Apr 2014	Apr 2017	Stay put or apply update 1	<ul style="list-style-type: none"> Stay code current Deploy A9.2 Update 1 and extend support 1 year
A9.2 Update 1	May 2015	May 2018	Upgrade to A9.3 when available	<ul style="list-style-type: none"> Stay code current

ORACLE

Lifetime Support Policy Deliverables

Feature	Premier Support	Extended Support	Sustaining Support
Major Product and Technology Releases	✓	✓	✓
Technical Support	✓	✓	✓
Access to Knowledge Base (MetaLink/SupportWeb)	✓	✓	✓
Updates, Fixes and Security Alerts	✓	✓	Pre-existing Only
Tax, Legal and Regulatory Updates	✓	✓	No
Upgrade Scripts	✓	✓	No
Certification with existing Third Party Products/Versions	✓	✓	No
Certification with New Third Party Products/Versions	✓	No	No
Certification with new Oracle Products	✓	✓	No

Project Tools

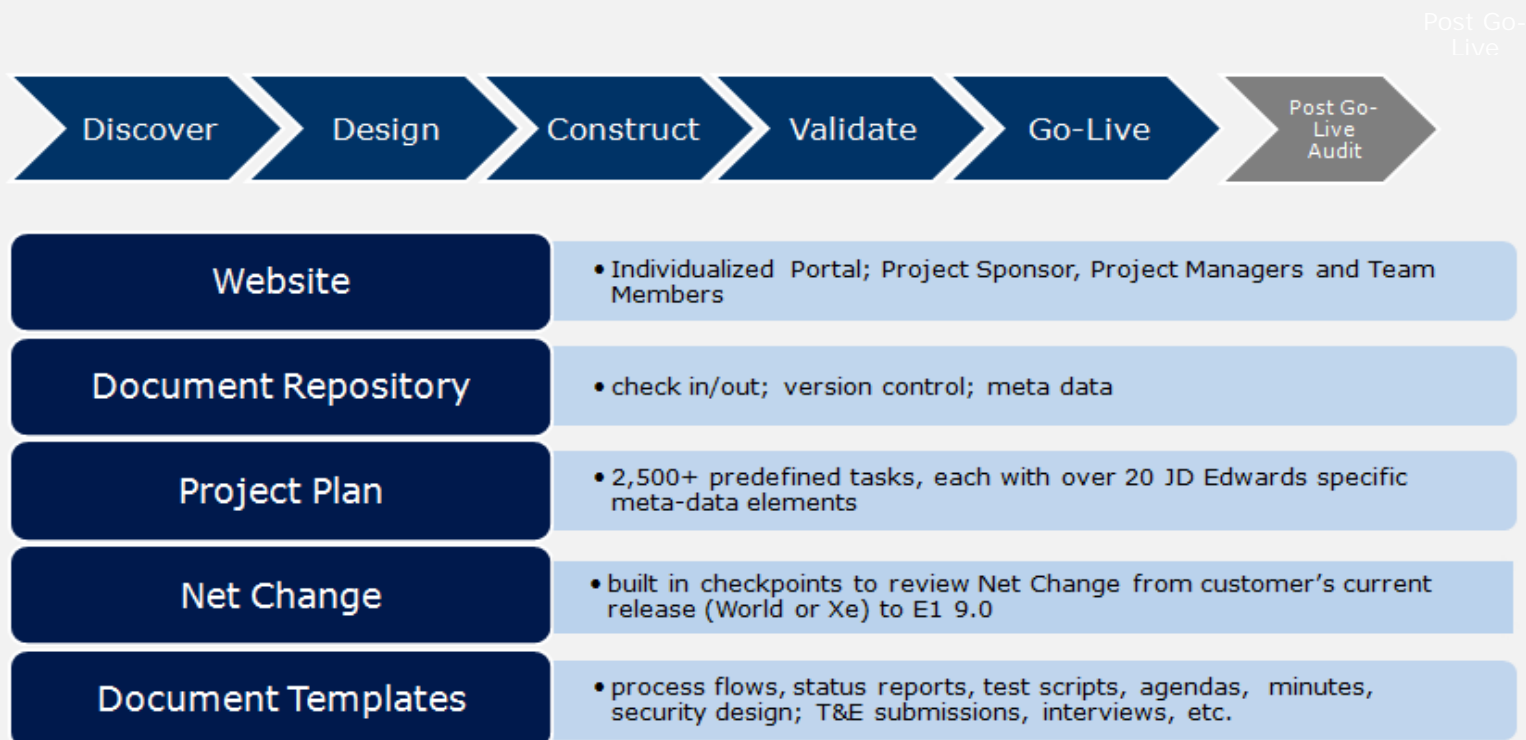
- » An Extensive Adaptable Project Plan
- » Using SMI Advanced Methodology
- » Document Management
- » Workflow
- » Tasks
- » Surveys
- » Key Performance Indicators

SMI JD Edwards Upgrade Toolkit



SMI's upgrade toolkit consists of phases, people, and tools fully integrated into a collaborative, scalable and on-line project repository.

This fully developed toolkit is specifically designed for JD Edwards and includes the following:



SAM: JDE Upgrade Toolkit



Project Manager Portal

- » Customizable Portals
- » Real-time project monitoring
- » Encompasses designated metrics
 - » Project Finances
 - » Task Completions
 - » Modification Status
 - » Go-Live Countdown
 - » Scheduled Time Off
 - » Project Milestones
 - » Critical Tasks Open
 - » Issues Log
 - » Tasks Running Late
 - » Modifications not Touched in 30 Days
 - » Documents Modified in last 7 Days
 - » Test Scripts or Promotions that Failed
 - » Critical Tasks Gantt Chart

Project Manager's Portal

Budget - Actual - Estimate to Complete

Week Ending	Fees	Expenses	Weekly Total	Original Budget	Change Orders	Current Budget
9/18/2009	21,875	1,890.39	23,765.39	975,000	3,600	978,600
9/11/2009	21,265	2,189	23,454	975,000	0	975,000

Key Performance Indicators

- On Time: ●
- Future State Approvals: ●
- Modifications ready for CRP: ●
- Test Scripts ready for CRP: ●
- Open Critical Issues: ●
- Over/Under Budget: ●

Task Completions

Modification Status

Go Live Countdown
110 14 43 00

Scheduled Time Off

Created By	Start Time	End Time
Vincent Hancock	11/21/2009 5:00 PM	11/28/2009 5:00 PM

Weekly Fees & Expenses

Week Ending	Fees	Expenses	Weekly Total
Sum =	43,140	4,079.39	
9/18/2009	21,875	1,890.39	23,765.39
9/11/2009	21,265	2,189	23,454

Critical Tasks Open

Project ID	Title	Scheduled Start
46	Schedule SAM Training Session	1/6/2009
56	Send questionnaires to interviewees	1/16/2009
158	Prioritize Reports	2/5/2009

Issues Log Open

Project ID	Title
56	Send questionnaires to interviewees
217	Conduct Sales Turnover Meeting
223	Complete DSI Project Management Plan (PMP)
224	Complete DSI Solution Test Plan (STP)
221	DSI Architecture Overview
220	Complete DSI Solution Requirements Specification (SRS)

Tasks Running Late

Project ID	Title	Scheduled Start
# Assigned To : Bhargava Kasturi	(1)	
# Assigned To : Bonnie Byrum	(1)	
# Assigned To : Bud Edmondson	(7)	
# Assigned To : Jabine Stelich	(13)	
# Assigned To : Noahna Murphy	(10)	

Modifications not Touched in the Past 30 Days

Object ID	Version ID	Title
# Assigned To : Bhargava Kasturi	(10)	
# Assigned To : James Park	(7)	
# Assigned To : Jonathan Iam	(6)	

Documents Added or Modified in the Past 7 Days

Name	Module	Doc
# Modified By : Vincent Hancock	(9)	

Test Scripts that Failed

Test ID	Title
---------	-------

Project Team Member's Home Page



Issues Documents Management Search this site...

Issues: Add an Issue All Open Issues My Issues

DOCUMENTS: SMI Documents

PORTALS: My Home Page

DISCOVER: SMI Calendar SMI Change Orders SMI Contacts SMI Reports SMI Tasks SMI Workflows

USAGE: SMI Accelerators SMI Enhancements SMI Workshops

CONSTRUCT: SMI Modifications

Thunder Valley Casino

HOME SWEET HOME

Tasks to work on now

Project ID	Title	Scheduled Start	Scheduled Finish
There are no items to show in this view of the "SMI Tasks" list. To add a new item, click "New".			

Workflows requiring my review or approval

Title	Status	Priority	Due Date	% Complete	Link
There are no items to show in this view of the "SMI Workflows" list. To add a new item, click "New".					

Reports I need to review

Report Name	Owner	Priority	Current Status
There are no items to show in this view of the "SMI Reports" list. To create a new item, click "New" above.			

New features to check out

Title	Module	Release	Suite	Current Status
Facing Workflows Data Sensitive	Advanced Filings	9.00	IRS	00: Identifier

PROJECT CENTRAL

Environments


- VMS
- Development
- Training
- Conversion
- Conference Room Pilot

Milestones we are targeting

Title	Start Date	End Date
Start Project	4/4/2010	4/5/2010
Conference Room Pilot One	7/22/2010	7/27/2010
Conference Room Pilot Two	8/23/2010	8/27/2010
Integrated System Test	9/13/2010	9/24/2010

Project Team Member's Page

100% ADMIN
Home Page
John Lybch



Edwards Lifesciences

Edwards Lifesciences

Home
Help & Status

Issues | Documents | Management
Search this site

ISSUES

Add an Issue

All Open Issues

My Issues

DOCUMENTS

JOE Documents

PORTALS

My Home Page

DISCOVER

SMI Calendar

SMI Change Orders

SMI Contacts

SMI Reports

SMI Tasks

SMI Workflows

DESIGN

SMI Accelerators

SMI Enhancements

SMI Workshops

CONSTRUCT

SMI Modifications

SMI Protocols

SMI Security

VALIDATE

HOME SWEET HOME

Tasks to work on now

Project ID	Title	Scheduled Start	Scheduled End
79	Write up Interview Notes - Growth Management	1/21/2010	1/27/2010
131	Collect Reports - Growth Management	1/21/2010	1/27/2010
175	Identify Interfaces - Growth Management	1/21/2010	1/27/2010
368	Identify 300 Files that require Legacy Data - GM	2/16/2010	2/22/2010
769	Identify Legacy Files to be Converted - GM	2/16/2010	2/22/2010
770	Map Legacy Data Files to JOE Data Files - GM	2/16/2010	2/22/2010
771	Create Data Conversion Specifications - GM	2/16/2010	2/22/2010
885	Design Future State - Growth Management	2/16/2010	2/1/2010
909	Configure Call Codes - Growth Management	2/16/2010	3/1/2010
906	Write Workshop Material - Growth Management	2/16/2010	3/9/2010
1,029	Write Report Specs - Growth Management	2/16/2010	3/15/2010
1,066	Write Interfaces Specs - Growth Management	2/16/2010	3/15/2010
643	Conduct Workshop - Growth Management	3/9/2010	3/22/2010
882	Specify Installations - Growth Management	3/23/2010	3/24/2010
2,454	Identify Test Scripts - Growth Management	3/30/2010	4/1/2010
2,378	Write CTT Docs - GM	3/30/2010	4/12/2010
2,090	Train Core Team - Growth Management	4/9/2010	4/19/2010
1,558	Configure Growth Case Center Defaults	3/30/2010	4/19/2010
1,554	Configure Harvest Period Defaults	3/30/2010	4/19/2010
1,680	Configure EUR Definitions	3/30/2010	4/19/2010

PROJECT CENTRAL

Environments

- UHL
- Development
- Training
- Conversion
- Conference Room Pilot

Milestones we are targeting

Title	Start Date	End Date
Open Project	4/4/2010	4/5/2010
Conference Room Pilot One	7/22/2010	7/27/2010
Conference Room Pilot Two	8/23/2010	8/27/2010
Integrated System Test	8/18/2010	8/24/2010
Go Live	10/3/2010	10/4/2010




My team buddies

Last Name	First Name	Business Phone

SAM's Document Management

Maintaining a central repository for all team participants ensures everyone has the latest version of a document at all times.

Practice site for the Diamond team, will be deleted before 5/30.

New ▾ Upload ▾ Actions ▾ Settings ▾						View: Doc Type ▾
Module	Doc Type	Type	Name	Modified	Modified By	
Count = 139						
⊕ Doc Type : (1)						
⊖ Doc Type : Agenda (3)						
Count = 3						
*ALL	Agenda		SMI090101 - AGN - Meeting Agenda Template	4/26/2009 6:35 PM	Vincent Hancock	
*ALL	Agenda		SMI090101 - AGN - Workshop Schedule	4/26/2009 6:35 PM	Vincent Hancock	
*ALL	Agenda		SMI090101 - AGN - PSW Meeting Agenda	4/26/2009 6:35 PM	Vincent Hancock	
⊕ Doc Type : Budget, Actual & ETC (1)						
⊕ Doc Type : Conversion Activity (48)						
⊕ Doc Type : Error Notification (2)						
⊕ Doc Type : Future State Process (1)						
⊕ Doc Type : Implem Strategy Document (2)						
⊕ Doc Type : Interview (63)						

SAM's Workflow

Ensure documents, process and changes are reviewed and approved.

Versions saved for Please approve SMI090507 - INT - Interview Template Devin

All versions of this item are listed below with the new value of any changed properties.

Delete All Versions		
No. ↓	Modified	Modified By
3.0	5/7/2009 2:45 PM	System Account
	% Complete 100 %	
2.0	5/7/2009 2:45 PM	Devin Hill
	Status Completed	
1.0	5/7/2009 2:41 PM	System Account
	Title	Please approve SMI090507 - INT - Interview Template Devin
	Priority	(2) Normal
	Status	Not Started
	Assigned To	Devin Hill
	Description	Please approve SMI090507 - INT - Interview Template Devin
	Start Date	5/7/2009
	Due Date	5/10/2009
	Actual_Start_7_days	1/6/1900
	Actual_Finish_7_days	1/6/1900
	Workflow Name	SMI Approval (ONLY USE THIS WORKFLOW)
	Content Type	Office SharePoint Server Workflow Task

SAM's Project Calendar

SAM centralized calendar provides all team participants access to all project events.



The screenshot displays a 'Project Calendar' window for July 2009. The interface includes a title bar, a navigation pane on the right, and a main calendar grid. The calendar shows various events such as 'Anton Off', 'HOLIDAY', 'Team Meeting', and several 'Vacation' periods for team members like Dave, Dennis, John Warren, and Andy. A dropdown menu on the right lists categories: Calendar, Meetings, Milestones, PM - Mass Update, and Vacation & Time Off.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	1	2	3	4
				Anton Off 10:00 AM Team Meeting	HOLIDAY	
5	6	7	8	9	10	11
	Dave Vacation			Dennis Vacation		
	Bob Off	Devn Off		Jeremiah off		
	1 more item	1 more item	3 more items	3 more items	2 more items	1 more item
12	13	14	15	16	17	18
Dennis Vacation		Kevin in Stockton				
	Felicia off	Lombardo - PTO		10:00 AM Team Meeting	Andy Off	John Warren Vacation
19	20	21	22	23	24	25
				Johnathan Vacation		
	John Warren Vacation					
	Anton Vacation					

SAM's Tasks

SAM provides for bi-directional flow of project tasks between MS Project Plan and SAM.

Tasks - Phase 2

Tasks - Phase 2					
New ▾ Actions ▾ Settings ▾		View: Tasks - By Assigned ... ▾			
Project ID	Title	Due Date	Scheduled Start	Actual Start	Scheduled Finish
[-] Assigned To : (23)					
[-] Assigned To : Amon Roshan (22)					
[-] Assigned To : Andy Davey (13)					
[-] Assigned To : Charles Boyle (9)					
638	Approve Test Scripts - EDI	9/1/2009	7/8/2009		7/10/2009
1,010	Retro fit any jobs listed in Gentran scheduler.	6/23/2009	7/8/2009		7/14/2009
1,017	Develop a conversion or porting strategy for Trailblazer	6/23/2009	6/30/2009	6/30/2009	7/14/2009
676	Train Core Team - EDI	8/12/2009	7/8/2009		7/21/2009
1,008	Retro fit application file layouts to match new JDE 9.0 file formats.	6/30/2009	7/8/2009		7/21/2009
1,037	Investigate UniCode Compatability for GenTran	6/30/2009	6/30/2009	6/30/2009	7/21/2009
1,003	Configure communication parameters.	7/28/2009	7/22/2009		7/28/2009
1,004	Customize the Gentran subsystem parameters.	7/28/2009	7/22/2009		7/28/2009

SAM's Tests

SAM has hundreds of sample test scripts preloaded saving you enormous time and significantly reducing project risk.


Test Scripts


Test ID	Title	Assigned To	Status	Role	Stage	Predecessors
Module : Accounts Payable (95)						
Module : Accounts Receivable (87)						
Module : Address Book (76)						
Module : Advanced Pricing (11)						
Stage : 10. Identify (11)						
AI-01	Price & Adjustment Schedule Revisions		Not Started		10. Identify	
AI-02	Price & Adjustment Definitions		Not Started		10. Identify	
AI-03	Price & Adjustment Detail Revisions		Not Started		10. Identify	
AI-04	Address Book Revisions		Not Started		10. Identify	
AI-05	Sales Order Inquiry - All Doc Types		Not Started		10. Identify	
AI-06	Ship-Tos by Broker Report		Not Started		10. Identify	
AI-07	Ship-Tos by Broker - Individual Broker		Not Started		10. Identify	
AI-08	Ship To By Chain Report		Not Started		10. Identify	



SAM's Alerts

SAM provides real-time e-mail alerts notifying you of changes and new responsibilities.

 **Date: Today**

 **Diamond** **Tasks - Please review DIAM090701 - SR - ... has been assigned to you** **7/12/2009 11:51 AM**


From: Diamond [SPS@snius.com] Sent: Sun 7/12/2009 11:51 .
To: Vincent Hancock
Cc:
Subject: Tasks - Please review DIAM090701 - SR - ... has been assigned to you

Task assigned by Vincent Hancock on 7/12/2009.
Due by 7/30/2009.

Can you please review and provide feedback.

To complete this task:

1. Review [DIAM090701 - SR - Project Status Report.pdf](#).
2. Perform the specific activities required for this task.
3. Use the **Edit this task** button to mark the task as completed. (If you cannot update this task, you might not have access to it. Click [here](#) to request access.)





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Oracle Software, Services and Support



Q&A

Scott A. Morewood – scott.morewood@smius.com