



J I B E

Management and Technology Consulting

Crafting the business case for upgrading your JD Edwards EnterpriseOne System



Jibe Consulting

Bringing all the pieces together.



Should you Upgrade

You may choose to

- Remain on your existing release,
- Upgrade to a more current release, and/or
- Evaluate planned Fusion Applications as they become available.



We will discuss the following topics

- **Evaluating Key Criteria** — is there a potential value to you in future releases so you can weigh these against the cost of upgrading
- **Identifying Business Value** — are there areas to explore which may benefit your end user and IT business processes
- **Making a Decision** - guides you through summarizing the data you have gathered and choosing the right strategy
- **Next Steps and Other Resources**



Evaluating Key Criteria



Evaluating Key Criteria

Application Functionality

- Business value in new application functionality

Technological Considerations

- Business Value in new tools functionality and additional technical products
- Review Application/Tools Matrix to match tools release to application release

Evaluating Key Criteria

	Applicati on and Tools Releases Matrix							
	JD Edwards EnterpriseOne Tools Release							
JD Edwards EnterpriseOne Applicati on Release	8.9 SP1	8.9 SP2	8.93	8.94	8.95	8.96	8.97	8.98
EnterpriseOne 8.9	*	*	*	*	*	*	*	
EnterpriseOne 8.10			*	*	*	*	*	*
EnterpriseOne 8.11				*	*	*	*	*
EnterpriseOne 8.11 SP1					*	*	*	*
EnterpriseOne 8.12						*	*	*
EnterpriseOne 9.0							*	*



Evaluating Key Criteria

Testing, Usability and Performance

- Increased quality, usability and performance of current version of EnterpriseOne
 - Improve efficiency and effectiveness of end users
 - Provide faster and smoother upgrade experience
- Testing
 - Oracle's use of automated regression testing suite with over 5,500 test cases
 - Continued Oracle investment in this area which increases quality of new releases



Evaluating Key Criteria

- User Experience (Usability)
 - Redesign of applications (i.e. Sales Order Entry)
 - Increased usability for new applications (i.e. Demand Flow Manufacturing and CRM)
 - Tools usability enhancements (i.e Hot Key Support, improved Data Entry, immediate user feedback)



Evaluating Key Criteria

- Performance
 - Performance testing and tuning is now part of Oracle's development process
 - Focused performance efforts on most used on-line and batch applications
 - Ship confirm is now 53% faster
 - Work order processing improved by 52%
- Hardware
 - Upgrade to target release will require review of hardware sizing, infrastructure and architecture



Evaluating Key Criteria

- Support Policy Review

Release	GA Date	Updates, Fixes, Security Alerts, and Upgrade Scripts	Tax, Legal, and Regulatory	Extended Support Ends	Sustaining Support Ends
Xe	Sep 2000	Dec 2013	Dec 2013	Not Available	Indefinite
8	Jun 2002	Dec 2013	Dec 2013	Not Available	Indefinite
8.9	Sep 2003	Sep 2008	Sep 2009	Not Available	Indefinite
8.10	Jun 2004	Jun 2009	Jun 2010	Not Available	Indefinite
8.11	Dec 2004	Dec 2009	Dec 2010	Dec 2012	Indefinite
8.11 CRM Mobile Sales(both i-Series and non i-Series)	Dec 2004	Dec 2009	Dec 2010	Dec 2010	Indefinite
8.12	Apr 2006	Apr 2011	Apr 2012	Apr 2014	Indefinite
8.12 CRM Mobile Sales(both i-Series and non i-Series)	Apr 2006	Apr 2011	Apr 2012	Dec 2010	Indefinite
9.0	Sep 2008	Sep 2013	Sep 2014	Sep 2016	Indefinite

JD Edwards EnterpriseOne Release Xe and Release 8 will receive Premier Support until Dec 2013. JD Edwards EnterpriseOne Releases 8.11, 8.12, and 9.0 will each have a direct path to applications built on Oracle Fusion Middleware. The support time frame for Release 8.11 also includes Release 8.11SP1. Each JD Edwards EnterpriseOne Tools release expires no sooner than three months after a new JD Edwards EnterpriseOne Tools release becomes generally available.



Evaluating Key Criteria

- Support Policy Definitions
 - Premier Support
 - Major product and technology releases
 - Technical support
 - Updates, fixes, security alerts, data fixes, and critical patch updates
 - Tax, legal, and regulatory updates
 - Upgrade scripts
 - Certification with most new third-party products/versions
 - Certification with most new Oracle products



Evaluating Key Criteria

– Extended Support

provides you with an extra three years of support for an additional fee

- Same as Premier Support

– Sustaining Support

- Major product and technology releases
- Technical support
- Access to *OracleMetaLink*, *My Oracle Support*,
- Fixes, updates, and critical patch updates created during the Premier Support stage
- Upgrade scripts created during the Premier Support stage



Evaluating Key Criteria

– Sustaining Support (cont.)

- New updates, fixes, security alerts, data fixes, and critical patch updates
- New tax, legal, and regulatory updates
- New upgrade scripts
- Certification with new third-party products/versions
- Certification with new Oracle products



Identifying Business Value



Identifying Business Value

Release Considerations

- **EnterpriseOne 8.9**

Enhancements focused heavily on

- SCM
- FM
- HCM
- ALM

Total of 350 enhancements



Identifying Business Value

• EnterpriseOne 8.9 (cont.)

- Profit management
- Product variants
- Price management
- Promotions foundation
- Lot control
- Cross-docking
- Dual units of measure
- New engineer-to-order(ETO) capabilities
- Configurator (configured items processing)
- Order-to-cash
- Unicode
- Supply chain planning
- Employee Self-Service
- HCM data edits and data quality



Identifying Business Value

- EnterpriseOne 8.9 (cont.)
 - Key Benefits include
 - Analyze profitability by customer, product, or project
 - Streamline the order-to-cash cycle
 - Reduce inventory
 - Improve revenues via up-selling capabilities
 - Reduce supply chain costs
 - Increase customer satisfaction
 - Better manage multimode manufacturing projects
 - Consolidate view of global operations across multiple language sets
 - Use standardized XML-based supply chain planning integration



Identifying Business Value

- EnterpriseOne 8.9 (cont.)
 - Enhancements ideally suited for
 - Consumer Goods
 - Industrial Manufacturing
 - Life Science
 - Wholesale Distribution



Identifying Business Value

- **EnterpriseOne 8.10**
Enhancements focused on
 - SRM
 - SCM
 - HCM
 - CRM
 - ALM



Identifying Business Value

- EnterpriseOne 8.10 (cont.)
 - Key enhancements are
 - Demand Scheduling Execution, a new offering designed to enhance collaboration for release accounting environments
 - Customer self-service enhancements that help lower costs while improving service
 - Enhanced logistics management to provide a sound foundation for data collection, upon which new radio frequency identification (RFID) logistics tactics can be developed
 - Improved cash and expense management
 - Financial and human capital management enhancements aimed at simplifying legislative and regulatory compliance
 - Important new equipment cost analysis and condition-based monitoring



Identifying Business Value

- EnterpriseOne 8.10 (cont.)
 - Key enhancements
 - capabilities for improving performance of capital assets
 - Significant improvements to subcontract management to increase user efficiency
 - More sophisticated tool, crew, and machine representation to increase the accuracy of supply chain plans and schedules
 - Introduction of the new eRecruit module



Identifying Business Value

- **EnterpriseOne 8.11**

Enhancements focused on

- **First ‘Web Only’ E1 Release**
- **Manufacturers in Consumer Goods**
- **Industrial Manufacturing**
- **Life Science**
- **Asset Intensive Industry**
- **Project Based Service Industry**

Total of 250 enhancements



Identifying Business Value

- EnterpriseOne 8.11 (cont.)
 - Key enhancements are
 - JD Edwards EnterpriseOne Customer Relationship Management:
 - This CRM solution incorporates manufacturing-specific business processes for sales and after-sales service interactions, including lead and opportunity management, consensus-based forecasting, real-time order promising, and case and service management.



Identifying Business Value

- EnterpriseOne 8.11 (cont.)

- JD Edwards EnterpriseOne Demand Flow®

- Manufacturing:

- Formalized, patented approaches for designing production lines, managing material replenishment, and staffing manufacturing production lines based on production volume and skill levels.

- JD Edwards EnterpriseOne RFID Processor:

- Builds on our existing outbound RFID solution that enables suppliers to meet their customers' RFID requirements for each ship-to location.

- JD Edwards EnterpriseOne Sales and Operations Planning:

- Provides a single analysis workspace for sales, manufacturing, operations, and financial decision-making.



Identifying Business Value

- EnterpriseOne 8.12
 - Key Enhancements
 - Operational Sourcing
 - to manage procurement from the request for a proposal through supplier selection and award. Buyers can access real-time, accurate and complete information for direct, indirect and services procurement.
 - Grower Management, Grower Pricing and Payment, and Blend Management
 - to address the production and supply management needs of the food and beverage industry



Identifying Business Value

- EnterpriseOne 8.12 (cont.)
 - Key Enhancements (cont.)
 - HCM
 - to improve the capture, viewing, validation, payment and reporting of leave information in addition to improvements in eRecruit, payroll, and the introduction of employee scheduling and more
 - Demand Scheduling Execution
 - to enable the process of ordering, tracking, packaging and shipping parts for a series of sequenced requests from an OEM, particularly for automotive suppliers
 - Advanced Pricing Enhancements
 - to support new pricing strategies and improved price management capabilities, retaining customers by giving



Identifying Business Value

- EnterpriseOne 8.12 (cont.)
 - Key Enhancements (cont.)
 - Advanced Pricing Enhancements
 - to support new pricing strategies and improved price management capabilities, retaining customers by giving them the right price at the right time. Provides new ways to calculate prices, view and manage pricing set up information, and accelerate price resolution to meet customer demands.
 - CRM
 - Activities Homepage and direct access to transactions related to an activity to improve usability and efficiency in managing calendar entries and tasks.



Identifying Business Value

- EnterpriseOne 8.12 (cont.)
 - Increased employee productivity through improved performance
 - Usability enhancements (i.e. icons in grids)
 - Improved auditing and security reporting
 - Redeployment of administrative applications as HTML apps
 - Platform independent Meta data
 - XML Publisher in Tools 8.96



Identifying Business Value

- EnterpriseOne 9.0

- Key Enhancements

- Project and Government Contract Accounting (New Module)

- New release for managing complex and sophisticated contract terms and conditions both for commercial and U.S Government contracts

- Financial Management

- Business Unit/Job/Project and Account Life Cycle Control

- » After defining adjusting transactions, close a BU, job, project or individual account to all transactions except for adjustments

- Journal Entry Reversal Control



Identifying Business Value

- EnterpriseOne 9.0
 - Key Enhancements
 - BU Category Codes and Address Book Column
 - Journal Entry Reversal Control
 - Financial Burdening
 - Financial Allocations
 - Advanced Variable Numerators Allocations
 - Financial Compliance
 - Data Relationships
 - Financial Data Quality and Batch Performance
 - G/L Post
 - A/R Automated Cash Receipts



Identifying Business Value

- EnterpriseOne 9.0
 - Key Enhancements
 - Expense Management
 - Management of Billable and Non-Billable Expenses
 - Workflow approval of expenses
 - Auditability of Expenses and Approvals
 - HCM
 - Time and Labor
 - HR Self Service (Employee and Manager)
 - Sales Order Management
 - Kit Processing



Identifying Business Value

- EnterpriseOne 9.0
 - Key Enhancements
 - Procurement
 - Procurement and Subcontracts Management
 - » Subcontractor Retention
 - » Vendor Type
 - » Freight Expense Management
 - » Receipts Tracking with Expense at Voucher Match
 - » Contract Specific Labor Categories
 - » Service Units
 - » Added classification and reporting capabilities



Identifying Business Value

- EnterpriseOne 9.0
 - Key Enhancements
 - Manufacturing
 - Dynamic Configurator
 - Price and Cost Date Flexibility
 - Configured Purchased Components
 - Supply Chain Planning
 - Alternate Resources
 - UoM Planning
 - Word Order Start and End Times
 - Error Handling
 - Performance



Identifying Business Value

- EnterpriseOne 9.0
 - Key Enhancements
 - Grower Management
 - Blend Management
 - Real Estate Management
 - Home Builder Management
 - Oracle Business Intelligence Adapter
 - Pre-Built Oracle BI Data Warehouse Business Adapter
 - Oracle Financial Analytics
 - G/L and Profitability Analytics
 - A/P Analytics
 - A/R Analytics



Identifying Business Value

Technical Considerations

- Client Architecture
- Service Oriented Architecture (SOA)
- Middleware: Application Servers and Portals
- Middleware: Fusion Middleware
- Reporting: Crystal and XML Publisher
- Unicode
- Platform Options



Making a Decision



Making a Decision

- After researching the costs and benefits associated with upgrading your EnterpriseOne investment, you will want to aggregate the information to make a decision.
- Typically, choosing the release you will move to is a secondary concern.
- Consider making a decision about **whether or not to upgrade first**.
- Following are some simple examples that may help you get started on your evaluation. From these ideas, you can create a hybrid or modified approach



Making a Decision

- Approach I: Financial Evaluation Spreadsheet

Factor	Cost	Benefit	Notes
Consulting	\$50,000		Bid from partner
Retiring 3 rd Party Product		\$65,000	Year 1; Cancel maintenance, stop administration due to new functionality
Automate new process		\$30,000	Year 1; efficiencies from end users and less human error
Subtotals	\$50,000	\$95,000	
Advantage		\$45,000	Benefit after Year 1 (90% of cost)



Making a Decision

- Pro and Con Analysis

Pro	Importance (Ranked 1-4)
Access to latest enhancements	3
Longer support timeframe	2
Easier administration	1
Con	Importance (Ranked 1-4)
External cost	3
Internal change	2
Need to acquire web server skills	1



Making a Decision

- Strategic Map

Strategic Driver	Impact of Upgrading	Positive or Negative Impact
Increasing Employee Productivity	Usability improvements	+
	End users spending time in validation	-
	Consolidating user interfaces	+
Decreasing External Spend	New training required	-
	Outside consulting needs	-
	Replacing third party system	+



Next Steps – Other Resources



Other Resources

- This presentation is a summary of a set of Oracle White Papers accessible on metalink
- Application and Tools business value information can be found on metalink
- Contact

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