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Whitepaper

JD Edwards Upgrade and Integration Best Practices

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Introduction

Each of the JD Edwards family of ERP products presents unique requirements and challenges for integration. This white paper presents several best practices for JD Edwards IT departments for systems integration before, during and after the time of an upgrade.

Many JD Edwards customers have been manually integrating JD Edwards with other applications by building ad hoc program interfaces that are difficult to maintain and unlikely to scale, leading to significant risks.

This white paper is intended for JD Edwards customers who manage upgrades where significant data or processes need to be integrated with other applications. Upgrade of the JD Edwards environment can be challenging. Managing integration in anticipation of an upgrade is an essential part of managing your JD Edwards system.

This document will show at a high level how it is possible to work with a single-stack technology to design, deploy, and monitor integration flows that will help you upgrade and maintain your JD Edwards environment with a minimal amount of risk.

Magic Software Enterprises offers full technical support, training and professional services so that you can fully leverage the value of your JD Edwards systems using the Magic xpi integration platform.

JD Edwards Upgrade Planning Documents

JD Edwards EnterpriseOne is a popular solution for managing mid-size and large enterprises. Many long time JDE EnterpriseOne customers now find they need to upgrade their environments to leverage the many new features and/or to remain competitive and efferent.

Planning for an upgrade requires an experienced consultant knowledgeable in JD Edwards upgrade practices and functionality. In addition, it requires careful evaluation of all integration touch points and analysis of how-to carry them forward. All too often upgrade specialists are not well-versed in JD Edwards integration architecture. As a result their tendency is to avoid integration issues altogether or make changes that may compromise functionality with other applications.

This approach can put an organization at risk, diminish proprietary value and reduce a company to a least-common denominator approach to business. Upgrade planning requires careful documentation of current state and future state integration.

Best Practice 1

Document current state and future state integration as part of your upgrade plan

Conduct an integration audit and inventory in which all touch points are evaluated. Since manual integrations will likely not migrate from one version to the next, make a list of integration touch points to be replaced. Ideally, these integration touch points will be replaced before the upgrade.

Even a large number of integration touch points can be migrated from manual programs to an automated integration platform with just a few weeks of effort. Spending this time now will ensure that when you migrate, users and business unit leaders will instantly see the benefit of the upgrade rather than spend their time complaining about broken integrations.

If you are upgrading to JD Edwards EnterpriseOne version 9.2 in hopes of using the JD Edwards Orchestrator alone for integrations, keep in mind that you will only be able to create point-to-point integrations, and will still need a tool to handle data transformation and validation from JD Edwards to your other systems to avoid lengthy (and costly) implementations as well as all the headaches that come with manual point-to-point integration. However, when coupled with a low code integration platform, the Orchestrator can lower development times significantly.

Upgrade Planning:
Evaluation and Analysis

The business analyst should take time to meet with all stakeholders and perform a current state analysis to evaluate the reasons and needs for upgrading. Be sure to consult with both internal and external resources including Oracle, authorized Oracle Business Partners and independent consultants. This should also take into account any applications currently integrated with JD Edwards EnterpriseOne with Gather the facts and prepare the documentation necessary to prepare for your upgrade. Be sure to include a review of security issues. Run integrity reports that will give you a clear understanding of what it takes to upgrade.

Best Practice 2

Compare the cost of manual integration to the use of an integration platform

Using the inventory of integration touch points that you have prepared, provide an estimate of the number of hours needed to upgrade those integration touch points. In one column estimate the number of hours required for manual integration, in another column include the number of hours required using an integration platform.

Be sure to include an evaluation of any needed license costs for both options. Armed with this information, prepare a total cost of ownership analysis for your preferred integration approach. This analysis should show that an integration platform will save tens of thousands of dollars and in some organizations as much as a million dollars or more.

Upgrade Planning:
Integration Flows

When planning your upgrade, the key to overcoming challenges is choosing an Integration Architecture that will allow your integrations to functions after an upgrade. Ideally you want to build these flows so they require little or no change to accommodate upgraded versions of the application. This requires flexible middleware and may even allow for re-evaluation of integration methods when migrating.

For example, if you are currently passing data to JD Edwards EnterpriseOne using business functions or staging tables, having middleware in place allows you to switch these processes within JD Edwards to the Orchestrator before or after the upgrade, allowing your team to enjoy the benefits of the upgrade without worrying about lengthy implementations.
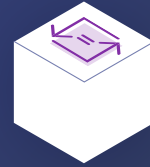
Magic xpi permits you to take advantage of all of the different features and functionality provided by JD Edwards EnterpriseOne for integration as well as providing a drag and drop utility that allows your business analysts (without requiring the skills of a developer) to build and maintain an integration between all of your applications. Justification of an integration platform approach should be included in the upgrade plan and incorporate an evaluation of process improvements. Current state is not always best state. Be sure to ask yourself: "how can the business process be improved and efficiency increased?" Incorporate these business process improvements into your upgrade plan as well.

Best Practice 3

De-risk the upgrade process by ensuring smooth integration is maintained

One of the greatest risks when upgrading is to ignore integration needs. Businesses that forget that they have interrelated systems run the risk of breaking business processes when they upgrade. Building an integration platform into your upgrade plan reduces that risk and enhances your project success.

Upgrade Planning:
Preparing for 'Go Live'

Before you upgrade, there are a number of things you can do to enhance your system. For example, you can defrag and reorder the database. Use solutions to archive and remove unneeded data and documents. Take adequate time before the Go Live date to train your technical staff in the new versions.
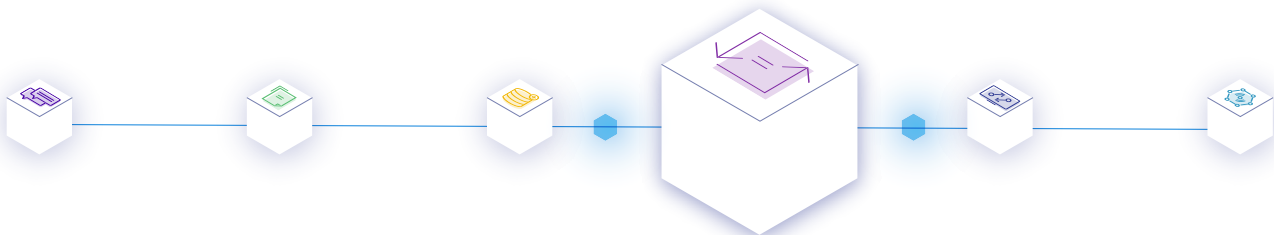
Prepare a thorough 'Go Live' checklist that includes the integration needs related to your upgrade. Are changes needed in other systems? Can you also archive and purge unwanted data in these systems now that you are upgrading? Use tools like Safety Checker and Visual Compare to prepare for your upgrade. Make sure that you work with an experienced JD Edwards Upgrade consultant because experience makes a difference at time of upgrade.

Best Practice 4

Use your upgrade 'Go Live' checklist to ensure that required integration to other systems is maintained

Will the switch over to the new system create integration blind spots that need to be factored into your plan?
Use your integration touch point inventory to evaluate what actions are required on other systems to ensure a smooth transition from current state to future state integration.

Applying Best Practices with
the Magic xpi Integration Platform

The Magic xpi Integration Platform provides benefit to customers by enabling a best practice approach to business process integration before, during and after an upgrade.

The Magic xpi Studio includes the Flow Editor and the Data Mapper. With these two editors, you can orchestrate business processes, define data transformations and control message flow. In addition, Magic xpi provides development and modeling aids that assist the business process developer in designing and implementing their solution.

The Magic xpi Integration Platform also includes the Magic xpi Monitor, which allows for logging and tracking of deployed integration flows through drill-downs from the business process models contained in the Flow Editor.

Enterprise-grade reliability and integrated scalability, provided by an In-Memory Data Grid (IMDG), are incorporated in every Magic xpi Server. This complete platform enables companies pursuing a JD Edwards upgrade the assurance of best practice approaches for business process design, integration and orchestration through event-driven and service-oriented architecture.

Key advantages of the Magic xpi Integration Platform include:

- Support from an Oracle Platinum Partner with over 15 years of proven, extensive JD Edwards integration experience
- Documentation tools that can be used for current state and future state business process descriptions.
- A significantly lower total-cost-of-ownership when compared to manual approaches.
- Reduction of risk factors when upgrading including higher user adoption rates.
- More effective business processes maintained on a platform with enterprise-grade reliability and integrated scalability.
- Loosely-coupled integration to ensure best practice and SOA compliance.
- Leverage existing assets through a metadata approach that creates efficiency across the organization.

Conclusion

Upgrades are the worst possible excuse for ignoring integration needs.
If anything, a planned upgrade makes an improved approach to integration a mandatory priority
in your annual IT project plan.

The value of an upgrade to your organization is significantly enhanced by the Magic xpi
Integration Platform, which offers business process integration with enterprise-grade reliability.

About Magic
Software Enterprises

Magic Software Enterprises (NASDAQ: MGIC) provides powerful and versatile enterprise-grade application and data integration solutions.

We draw on over 30 years of experience, millions of installations worldwide, and strategic alliances with global mobile and IT leaders, to enable our customers to seamlessly adopt new technologies and maximize business opportunities.

With a presence in more than 50 countries, including 10 regional offices, we collaborate closely with our customers and thousands of business partners to accelerate their business performance.

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