

# Efficient Implementation of Multiple Instances using CDK for JD Edwards EnterpriseOne

*An Oracle White Paper*  
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JD EDWARDS ENTERPRISEONE

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THIS DOCUMENT PROVIDES AN OVERVIEW OF FEATURES AND ENHANCEMENTS INCLUDED IN JD EDWARDS ENTERPRISEONE. IT IS INTENDED SOLELY TO HELP YOU ASSESS THE BUSINESS BENEFITS OF UPGRADING AND TO PLAN YOUR IT PROJECTS.

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# Efficient Implementation of Multiple Instances using CDK for JD Edwards EnterpriseOne

JD Edwards EnterpriseOne provides tools to enable fast, multi-instance rollouts.

## EXECUTIVE OVERVIEW

Geographic and organization structure, acquisitions, and divestitures may determine that you need multiple ERP instances to better meet global competition, economic swings, and complex, evolving government regulations. If a multi-instance strategy is appropriate you must identify the quickest, lowest cost way to activate ERP instances.

The Oracle White Paper “*Choosing the Right Number of Instances for JD Edwards EnterpriseOne*” provides information and assistance on crafting a multiple instance system; if you have this strategy in place, this white paper provides review and validation. If your strategy includes bringing additional divisions online, a variety of factors ensure organizational integration:

- (1) Execute rapid and low cost implementations
- (2) Deliver quality roll-outs
- (3) Ensure organizational cohesion

Beyond controlling your costs and quality, the third consideration is critical to ensure business success. You must share knowledge and best practices among company divisions and leverage what your organization already knows about effective, efficient JD Edwards EnterpriseOne implementations. Consistent system implementation facilitates enterprise-wide reporting, maintenance of the system, and other activities. This must be balanced with unique division requirements based on business needs. Your key challenge is balancing these division needs with common needs of the overall organization.

For multiple instances, you need to balance unique division requirements with common needs of the overall organization.

This paper lists key success factors for bringing additional divisions online and explains how JD Edwards EnterpriseOne supports you with attaining these factors while you deliver cohesive and value-driving ERP implementations across your entire enterprise.

## ENSURING ORGANIZATION INTEGRATION FOR MULTIPLE INSTANCES

### Rapid and Low Cost Implementations

Implementing new instances quickly drives a quick return on your investment.

One critical success factor in creating divisional instances is moving rapidly. The divisions may currently be using manual processes, home grown systems or third party systems that are barriers to business objectives and growth. The potential benefits of implementing ERP systems across them include greater operational insight, elimination of manual processes, and increased agility to allow for adjustment to changing business environments. Your business does not have the luxury of waiting 18 months or longer before realizing the operational efficiencies and value from the ERP system. As a result, you need to identify the best approach for bringing up these additional divisions on the system quickly.

In addition to facilitating fast implementations, you must minimize the cost of these rollouts. The JD Edwards EnterpriseOne Configuration Development Kit (CDK) gives you a collection of tools for streamlining many of the manual-intensive tasks inherent to implementation projects. For example, you can use CDK to bring the task views (menus) from an existing instance to a new division.

Use CDK to bring the task views (menus) from an existing instance to a new division.

CDK can also help you modify the task views to match any needs unique to this new business unit. CDK delivers value to you via inherent technology and capabilities to assist you with delivering fast and rapid implementations of initial and additional instances. There are two primary areas where these tools let you realize time and cost savings:

- (1) Configuration (or non-transactional) data creation
- (2) Repeatable deployment of the ERP parameterization (or system configuration) for driving business processes for user interaction

CDK is included in your license for JD Edwards EnterpriseOne – there is no extra cost.

In addition, CDK lowers your total cost of instance implementations because CDK is included in your purchase of JD Edwards EnterpriseOne. Instead of having to invest in multiple 3rd party tools to assist you with implementations tasks, you can utilize the native, integrated JD Edwards technology in CDK to assist with your successful implementation.

Responsiveness to business needs is of the utmost importance when additional ERP instances are being brought into an organization's information systems landscape. CDK provides the capabilities for successfully delivering quick and reliable implementations for additional ERP instances.

## High Quality Business Processes

As previously discussed, fast implementations of additional instances are the path to realizing quick organizational value. An equally important and complementary factor in successful multi-instance implementations is high-quality configurations. Companies invest to implement initial instances for ERP systems and a return on that investment is realized by the operational efficiencies brought to the organizational divisions that use those systems. Additional value can be derived from those investments by leveraging that experience for additional instance rollouts.

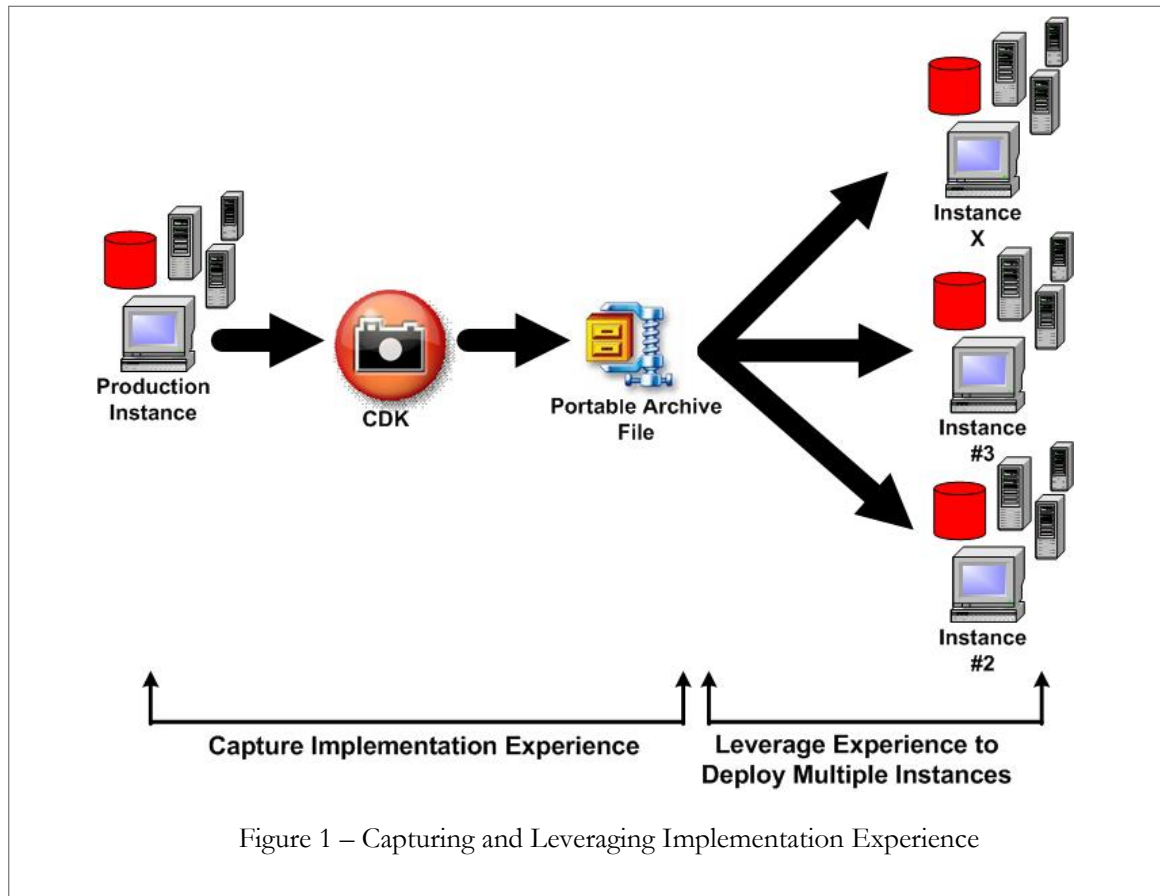


Figure 1 – Capturing and Leveraging Implementation Experience

Existing implementations of JD Edwards EnterpriseOne utilize the intellectual property that has been incorporated into the ERP system by way of its parameterization (or system configuration). The ERP parameterization is valuable experience that is contained within the ERP system and is an asset that you can reuse for the implementation of additional instances. Instead of manually rekeying parameters in a new instance, CDK enables you to easily and quickly extract and package it into a portable file (template) by using features that automatically identify

CDK gives you the ability to import configuration content into a new instance.

and select relevant parameterized components within JD Edwards EnterpriseOne. After generating the portable file, you deploy it, along with its contents, to another JD Edwards EnterpriseOne environment, eliminating the manual effort to recreate the configuration. See further Figure 1.

CDK enables configuration reusability that is valuable across several areas of the JD Edwards EnterpriseOne product. Two examples demonstrate the value of reusing a production instance configuration to rollout additional instances:

- **Example 1 – Activity Rules for Sales Orders and Purchase Orders –** Rather than invest time and effort in recreating the activity rules for sales orders and purchase orders (controlling the process flow and status codes of both types of orders) in a new instance, CDK lets you import the configuration content into the new instance.
- **Example 2 – System Security Model –** Use a standardized security model across all divisions. CDK lets you extract the security model from a production instance and import it as the security model for additional instances.

With CDK you always install common configuration components to additional instances without losing any ability to modify or add to these baseline components to meet specific needs of new instances.

### **Organizational Cohesion**

When bringing additional divisions online, you must ensure that organizational (or enterprise) cohesion enables adoption of leading practices for business processes and supports global visibility of business performance. Attaining these goals will bring wide-ranging benefits to your enterprise and across all divisions.

Leading or best practice business processes have been established over many years of organizations utilizing information systems to run their companies. You can leverage leading practice business processes to streamline processes, creating efficiencies without having to heavily modify or customize the system. For example, the payment process in accounts payable (A/P) can usually be used across various business units in your organization. While different organizations might execute the A/P payments process differently, a leading practice payments process will bring efficiencies to those organizations without compromising any competitive advantage that the company enjoys. The use of leading practice business processes coupled with a standardization of business processes within an enterprise can bring many benefits to an organization.

When attempting to establish business process consistency across divisions, you should focus on establishing the delicate balance between division-level autonomy and enterprise-wide business process consistency. Remember – while autonomy is important for certain key areas within divisions, it is equally important to preserve a level of business process consistency. An optimized level of business process consistency not only enables the enterprise to maintain a high level of operational

efficiency but also leverages information systems to obtain necessary business insight for adjusting to changing business environments.

Maintaining a level of consistency across the enterprise and its instances can simplify several activities for your organization:

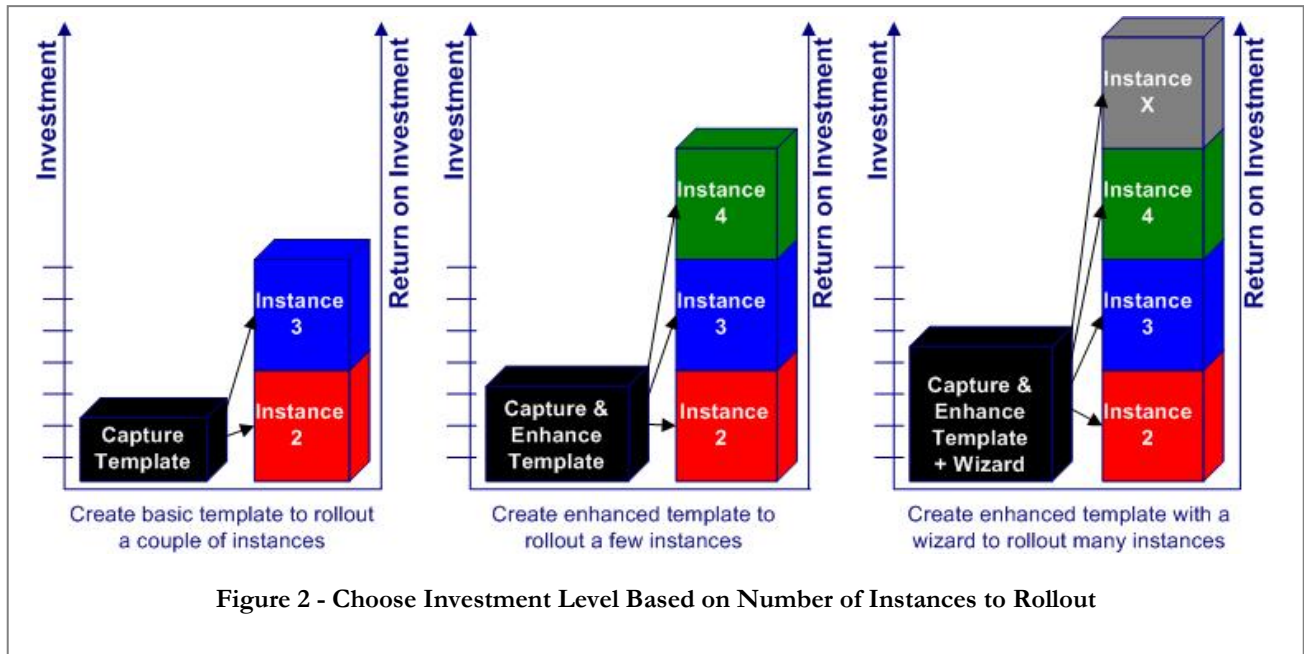
- (1) **Reporting and Aggregation of Information** – These efforts benefit from consistency through parameterized data configuration; this reduces heterogeneity of the structure of the reported data.
- (2) **Business Process Consistency** – Whether you have a single team or multiple teams managing the multiple ERP instances, business process consistency enables your organization to take advantage of implementation commonalities to gain efficiencies with the system administration function.

With CDK you create and deploy templates to support the level of organizational cohesion your organization is targeting. By creating a template using CDK, you rollout additional instances that leverage a common business process model. In addition, with CDK you create interactive wizards using a template for the baseline configuration subsequently applied to your additional instances.

Choose your level of investment based on the number of instances you require.

CDK gives you control over the amount of effort necessary to create new templates by allowing you to exploit existing production environments and employ functionality to automatically detect the required components necessary for additional instance rollouts. The amount of effort you invest to create a new template should be determined by the number of instances your organization plans on rolling out. See Figure 2 for a graphical representation of the level of investment you should consider when creating templates for multiple instance rollouts.

If you anticipate needing rolling out many additional instances, you can choose to create a more sophisticated and flexible template (perhaps one that includes a wizard) because economies of scale will be in your favor as implementation time and effort savings will outweigh the template creation costs over time. On the other hand, if you anticipate rolling out only one or two additional instances, you should invest only a small amount to create a basic template for getting those additional instances up and running quickly. Ultimately, you want to ensure the efficiencies you gain by using CDK for rolling out additional instances outweigh the investment you make creating new templates. CDK lets you choose the template type to create (basic, intermediate, or advanced) in alignment with your multiple instance strategy.



### SUMMARY

The JD Edwards EnterpriseOne Configuration Development Kit provides a variety of functional and technical capabilities that will assist you with the rollout of additional JD Edwards EnterpriseOne instances. CDK assists in executing rapid, low cost instance rollouts by making use of past implementation experience and maintaining organizational cohesion to ensure value driving ERP implementations. With JD Edwards EnterpriseOne, you gain confidence with your multiple instance strategy since we provide tooling and functionality to execute implementations in a fast, reliable and enduring fashion.

### OTHER RESOURCES

Contact your Oracle or partner account representative to get further information about leveraging Configuration Development Kit for multiple instance rollouts, JD Edwards EnterpriseOne, and our commitment to your success.

#### Oracle Business Accelerator Site on Oracle.com

This site has information about Oracle Business Accelerators and Configuration Development Kit. You will find documents including data sheets on Configuration Development Kit and Oracle Business Accelerators. To access the Business Accelerator site:

- (1) Enter the following address in your web browser:  
<http://www.oracle.com/applications/oracle-business-accelerator.html>

- (2) Select **Data Sheet: JD Edwards EnterpriseOne Configuration Development Kit (PDF)** on the Brochures and Data Sheets right-hand pane

### **Upgrades Section on Customer Connection**

The Customer Connection Web site contains information focused on upgrades. Several documents will be of interest to multiple instance strategies, performance, infrastructure, and more. To access this site from Customer Connection:

- (1) Select **Implement, Optimize + Upgrade** on the left bar
- (2) Select **Upgrade Guide**
- (3) Select **JD Edwards EnterpriseOne Upgrade Resources**

To find the multiple instance strategy white paper

- (1) Select **Evaluate**
- (2) Find the **Choosing the Right Number of Instances for JD Edwards EnterpriseOne** link to access the white paper

### **Configurations Site on Customer Connection**

The Customer Connection Web site also contains information focused on configurations. There a variety of collateral and training related to Configuration Development Kit including a Configuration Development Kit overview, documentation guides, installation instructions, and more. To access this site from the Customer Connection home page:

- (1) Select **Updates + Fixes** on the left bar
- (2) Select **EnterpriseOne + World Update Center** on the left bar
- (3) Select **Configurations** on the **News and Links** right-hand pane



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