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SPIROL Makes Smooth Transition to JD Edwards World A9.1

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Abstract

Many organizations are naturally concerned that modifications to their JD Edwards World applications could hinder them from upgrading to World A9.1. The following case study shows how one company addressed this issue and realized the benefits of upgrading while minimizing its risks.

Over the years, organizations that use Oracle's JD Edwards World have made extensive modifications to the applications. These changes have been made to meet requests from users for custom reports, requirements from customers for improved data access, mandates from regulatory agencies for standards compliance, and a host of other demands.

Now that JD Edwards World A9.1 is available, users are wondering whether their modifications will make it difficult or even impossible for them to upgrade to the new version. Since most of these companies support their software with small IT staffs, they have limited resources to rewrite their modifications for World A9.1 or to determine whether they can replace them with new functions in the product.

The following case study examines one company that found itself in this position, but discovered that the upgrade to JD Edwards World A9.1 was easier than it anticipated. Its story provides evidence that upgrading to the new version could be a less resource-intensive project than many organizations fear.

A History of Innovation and Efficiency

Wherever you are sitting or standing at this moment, you are probably within arm's reach of an object that has SPIROL products inside of it. For more than 55 years, SPIROL has been a leading-edge designer and manufacturer of pins, dowels, shims, limiters, and other fasteners. Its products are used to assemble aircraft, appliances, automobiles, electronic devices, power tools, and even eyeglasses. Were it not for the innovative products that SPIROL has created over the years, many of the products we use would simply not hold together.

Since 1983, SPIROL has relied on JD Edwards World to hold its business together. Over the years, the company has extended the software to cover its manufacturing and distribution processes as well as its accounting functions. Today, SPIROL's 350 employees access JD Edwards World from workstations at offices in the United States, Canada, China, Europe, and Mexico. Despite its far-flung operations, the company supports its users from a single instance of the software running on servers at its headquarters in Danielson, Connecticut.

While SPIROL relies heavily on JD Edwards World, it is not the only software it uses. As Pamela Cinami, Business Systems Manager for the company, explains, "Our teams rely on Lotus Notes databases for managing customer relationships, corrective actions, and other functions. Like most manufacturers, we have forms and barcode software to manage our inventory. We also

use electronic data interchange (EDI) tools to communicate with our customers. Finally, we maintain a web site through which customers can purchase our products or request custom quotes.” Amazingly, the company supports all of its systems with an IT staff of only seven employees.

With many applications to maintain and a limited staff to maintain them, SPIROL often found itself hard-pressed to stay current with new JD Edwards World service packs. As a result, the company decided several years ago to standardize on World A7.3 Service Pack 9. This allowed the IT team to focus more of its efforts on developing custom templates and reports, enhancing the web site, and making it easier for overseas employees to access JD Edwards World in multiple languages. Though the team still had to apply its own fixes and workarounds to World, doing so took less time than applying service packs.

The Need for a New Direction

While SPIROL’s strategy worked well for several years, it gradually became more of a hindrance than a help. As Cinami recalls, “Oracle had delivered so many service packs for JD Edwards World that it was becoming increasingly difficult for Oracle Support to recreate and troubleshoot the problems we were having with certain applications. As a result, identifying defects and determining what fixes we needed to apply was like searching for a needle in a haystack.”

In addition, SPIROL found that its IT requirements were outgrowing its JD Edwards World implementation. It wanted to take advantage of capabilities in newer service packs such as approval routings and database auditing. It wanted to use World’s Self Service for Customers module to provide more seamless integration between its web site and its production databases. It also realized that by deploying a current release, it could use JD Edwards applications to manage many of the business processes it was supporting through Lotus Notes databases. That would make users more efficient and enable them to work with the same body of information.

When SPIROL decided that it was time to upgrade, JD Edwards World A9.1 was not yet available. That led it to consider an upgrade to JD Edwards EnterpriseOne. Indeed, Cinami remembers that the company was on the verge of creating an EnterpriseOne test environment when World A9.1 became available. “When I saw demonstrations of World A9.1 in April 2007, I began to consider whether we should test it. As I talked with early adopters and the World development team, I became increasingly convinced that our best strategy was to upgrade to the new version. Within a couple of weeks, we created a World A9.1 test environment and put together a deployment plan.”

While the company was enthusiastic about deploying JD Edwards World A9.1, it had concerns about the effort and risk that the project would entail. “Considering the size of our IT staff, we really wondered if we could pull off the upgrade,” Cinami recounts. “We had dozens of custom templates, queries, and reports that potentially needed rewriting. We had vocabulary overrides and custom menus for our international employees that had to be converted. There was also the issue of remapping the data flows between World A9.1 and our EDI applications. Moreover, since all of our offices use a single instance of our applications on a ‘7/24’ basis, we only had a small time window during a single weekend to switch everyone over to the new version. If anything went wrong, the entire company could have faced significant downtime.”

A Plan and a Partnership

To minimize the risks it faced, SPIROL worked with Oracle to create a test environment that was refreshed with live data from the production system on a weekly basis. This allowed the company to evaluate its modifications in the environment using current data, determine whether to retire or rewrite them, and then test any rewritten code. In addition, the company asked more than a dozen of its most frequent World users to put the new version through its paces and point out any errors they discovered.

Throughout this process, SPIROL turned frequently to Oracle for support. According to Cinami, the JD Edwards World team in Denver provided stellar service. “Throughout the testing process and our ‘go live’ weekend, Oracle provided us with a single contact who ensured that we received whatever help we needed. Whenever we ran into problems, our contact was on call to help us. I could not be more pleased with the support that we received.”

While Oracle provided considerable assistance to SPIROL, it was the company’s IT staff that evaluated and rewrote its modifications for JD Edwards World A9.1. Despite its small size, Cinami notes that the team completed the entire process in five months. “Though the project was a challenge for us, it was not as difficult as we had imagined it could be. The fact that we were able to do it without hiring consultants speaks volumes about the ‘upgrade-ability’ that Oracle has built into the new version.”

With its tests and code rewrites completed, SPIROL decided to go live with the new version on a single weekend in the middle of October 2007. While Cinami and her team were naturally anxious about what would happen, they were pleasantly surprised with the results. “We started the switchover on Friday night and had the entire system up 48 hours later. For the first week, our team worked in split shifts so that someone was always available to assist our overseas users. While they did have to resolve a handful of problems during those shifts, there were fewer issues than we expected. Even the remapping of the data flows to the EDI system went off without a hitch.”

An Unfolding Potential

Now that the upgrade is behind it, SPIROL is beginning to realize the benefits it sought from the project. It is using the database auditing functions in JD Edwards World A9.1 to track changes made to critical files and to improve the quality of data entries. It is preparing to deploy the World Self Service module so that customers can view their order histories via the company’s web site. It is also exploring capabilities in World A9.1 that could help it eliminate several of its Lotus Notes databases. For instance, World’s Quality Management System contains features that could enable SPIROL to replace a material certification system it maintains in Notes.

For Cinami, what is just as satisfying is the stability and supportability of JD Edwards World A9.1. “I am happy to report that our applications are significantly more stable than they were before we upgraded. By implementing World A9.1, we inherited all of the fixes and enhancements that Oracle made after we stopped deploying service packs. We also eliminated the fixes we had implemented that were necessary at the time, but that made it increasingly difficult to support our applications. Now that we are on the current release, our staff spends more time delivering added functionality to our users and less time resolving defects.”

In short, SPIROL is highly satisfied with JD Edwards World A9.1 and its upgrade experience. The company is also confident that the application suite will support its operations for years

to come. As Cinami concludes, “One of things that convinced us to upgrade was Oracle’s Applications Unlimited strategy to enhance and support JD Edwards World for the long term. Now that I have seen what those enhancements can do for our company, I would encourage anyone who is considering an upgrade to do so.”

Our Conclusions

While it would be foolhardy for us to say that every JD Edwards World user will have as positive of an upgrade experience as SPIROL did, the company is not an isolated case. In our discussions with other early adopters, we have heard similar stories. Their accounts indicate that many of the customizations that customers have made could be brought forward or retired with less effort than they may be anticipating.

Our research leads us to draw three additional conclusions. First, the JD Edwards World A9.1 code base is exceptionally stable for a release that has been generally available for less than a year. Second, the release offers a considerable number of enhancements and new functions that should justify upgrades for many customers. Third, Oracle is providing significant support resources to companies that upgrade.

Given the mounting evidence from early adopters, the time has come for the rest of the JD Edwards World community to give serious consideration to upgrading to World A9.1. The new release could also be a viable replacement for similar applications that run on the IBM System i, but are not being adequately enhanced to meet the requirements of their users. Whether deployed as an upgrade or a new application, JD Edwards World A9.1 could help many organizations move beyond the functional limitations of their existing enterprise software.