**Best practices for successful JDE implementation**

**Editor’s Note:**

Software industry has seen increasing demand for JDE projects in 2012 (which will increase more in 2013) due to companies moving from world to Enterprise one, XE to version 9.x and adding more functionality in their current system footprint. One of the favorite questions in customer forums and Collaborate meeting rooms is: what is the best way to quickly implement JDE system. JD Edwards’ has attained the mind-share among the C-level executives that it is easy to implement and much easy to reconfigure as well. However, the middle management is bogged by various system integrators on project models and methodologies. Companies are increasingly interested in showing that they are the early-adopters of technology and take that as a competitive advantage. Same interest is also shown in project methodologies and adopting best practices in software implementation.

Do we need a big-name system integrator? Do we need a PMO (project management office) and a pool of project managers equipped with project control software tools? Do we need an executive sponsor, steering team and a core team? Who are the best candidates for power users?

In this article, Matt Ravikumar takes a look at some of the basic framework need to achieve success in any JDE implementation.

**Criteria 1: Project Structure**

For every major project, there should be an executive sponsor (typically from the business side) who has the authority to decide on the budget and timelines. There will be a steering committee of key functional heads, with their stakes in the project’s success. Then the core team of power users, business leads, senior business analysts, development managers, technology managers, infrastructure managers, etc. In large organization there is an extended team, where members are included as needed basis. An organization chart is prepared and communicated for each major project.

Simple steps like publishing the project details on the company intranet or SharePoint site, having a dedicated email distribution list, frequent and informal group gathering without any specific agenda, etc. will go a long way in the visibility of the project across the organization.

**Criteria 2: Executive involvement**

This criterion is about when to meet and its frequency. There are companies where steering committee meets more often than the core team! This results in reviewing the same project status again and again. People lose interest and then start delegating the meeting invites! The meeting frequency is a subjective discussion and is based on the company’s working style. At the minimum the core team should meet weekly and steering committee on a monthly basis. The idea is to give momentum whenever there is a slack and not to kick boredom in those meeting.

Another reason for executive involvement is to prioritize various projects that are running concurrently in the company. We have seen resources accepting training calendar but asked to work on other initiatives on that particular week! It could be their annual performance review training session, HR re-orientation events, and leadership or management training programs. These are far away from software training/testing and users likely to give priority to them.

**Criteria 3: Scenarios and more scenarios**

Successful projects show that the scope was maintained and communicated at various levels. The best way to maintain the scope is to identify the business scenarios upfront and review them again at periodic implementation stages. The high level scenarios may stay intact, since those are formed from the known business issues. The detailed scenarios will go through changes after power users in that function go through the details and make modifications. Again, scenarios are powerful way of communicating the changes happening and demonstrate how we are testing & deploying them.

Steering committee may just review the high-level scenarios and how the system design has been evolved to address them. Core team will get into next level of details such as configurations, customization and reporting.

In a large project, each of the business scenarios are split into detailed sub-scenarios and then into testing scripts. A traceability matrix of connecting the test scripts to top-level scenarios will help to prove the top management that sufficient effort has been spent into the details.

**Criteria 4: User involvement**

A lot of surprises wait in this area for any JDE implementations. The complaints from the users are, they have to do their day-to-day work, the expectations are ever changing, no sufficient training, their pet-peeves are not addressed, etc. The power user or functional head is the champion to address resource conflicts, user availability and signing off their training needs/completions.

Many traditional projects keep the user training just weeks before go-live. This brings a lot of surprises, when the actual user communicates how exactly they handle the transactions, which is completely different from the original assumptions. The best strategy to avoid these types of conflicts is to train the users just after CRP as a first round of training. Convert the CRP test scripts as UAT scripts (user acceptance testing) just weeks before go-live and ask the users to execute them. UAT acts like an on-hand training and it has shown tremendous reduction in support calls after go-live!

Sign-offs: For every training event, whether it is one hour overview or a day-long training, there should be a simple sign-off sheet. In large organization, the department wide sign-off sheet should be compiled and sent to the department head. This will pro-actively involve senior executives and they can in turn dedicate additional project resources and/or re-allocate the project resources! Lastly, this will avoid users complaining just before go-live that they have not been adequately trained to handle the new business system.

**Criteria 5: System environment**

This area looks simple and easy but gets into complications and business sensitive, if something goes wrong! In the large project, a dedicated QA environment is a must with longer data refresh cycle. Besides the DV environment, a PY (prototype) environment will help in day-to-day production fixes. All the code to PD deployment must go from QA. Code freeze on production fixes during project go-live will help a long way to avoid small user level changes impacting wider functional transaction. This is especially critical if a new division or acquired company is going live on JDE on an existing system environment.

Another mitigation strategy is to schedule multiple rounds of CRP and ICRP (integrated CRP) and look for any transaction exceptions due to production code changes. Sometimes it may be advised to do code refresh from PD to QA for a multi-year rollout projects.

If the company has integrated environment with multiple software interface (like PDM, bar-code scanners, time entry, etc.), one of the non-production environment should completely mimic the production system. One can never underestimate the impact of small code changes in software in the matrix of interfaces. The technology manager should insist of specific testing scenarios which process data from ERP to other interfaces whether as an in-bound or as an out-bound processor.

**Conclusion**

Companies start ERP project with a text-book based project planning approach and then modify mid-stream to suit their operating culture and procedures. This paper highlights some of the key area to be kept in mind even if there is a completely customized implementation approach!

Implementing JDE system truly reflects the culture of the organization and how people respond to business challenges adopting their systems. We have seen teams implementing JDE system gets nominated in other initiatives like S&OP (sales and operations planning), IBP (integrated business planning), Six Sigma and other regional business process improvement initiatives. The confidence and knowledge gained by these resources is an important asset to the organization. Companies identify and motivate these resources so that they are ready for the next round business challenges!

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