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Whitepaper

Simplifying JD Edwards Upgrades – Handling Customizations (RetroDash)

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Simplifying JDE upgrade – Handling Customizations

With Oracle products evolving every day, it's imperative for its customers to upgrade to the latest and greatest version of the software. An upgrade not only guarantees vendor supportability, but also provides an opportunity to:

- Leverage new features and enhancements
- Retire or replace customizations with standard functionality
- Potentially improve usability and performance
- Proactively fix known issues and bugs in the old release
- Refresh hardware and re-evaluate organization platform roadmap
- Clean up unused, redundant customizations
- Keep up with IT advancements and cutting-edge technologies

Looking at the points mentioned above, anyone would wonder why businesses tend to continue with their existing JDE release and not upgrade. The reason can be as simple as “If it isn't broke, don't fix it”, or as trivial as “People resist change”. However, there are many other considerations while deciding to upgrade, to name a few:

- How to carry modifications and customizations
- What and how much to test
- Budget and resource constraints
- Buy in from business and acceptability
- How to port Integrations and interfaces

As listed above, one of the biggest worries of an IT manager during an upgrade is to ensure all the modifications and customizations are available and working in the new release.



What are customizations?

While retrofitting and testing in the new release are straight forward processes, getting a comprehensive list of customizations and their complexity is not. Most of the customers don't maintain the list of modifications or follow the object naming standards to accurately identify customizations. An incomplete or inaccurate assessment of customization may jeopardize the entire upgrade effort. In one of my upgrade experiences, the customer had to go through the exercise of customization assessment thrice (finally using RetroDash) before freezing the list of retrofit objects. JDE customizations can be broadly categorized into three groups:

- Pure custom objects – New custom objects ideally developed with system code 55-59
- Modified standard/base objects – Changes made to out of the box or ESU objects delivered by Oracle
- Copy of standard – Custom objects copied from a standard object

RetroDash

Customization assessment, however daunting task it may appear, can be simplified by choosing right tools and partners. RetroDash is a proprietary LTI accelerator tool for JDE upgrade. It's a Java-based, platform-independent tool used for object assessment. The tool provides list of Standard, Custom, Customized and copy of standard objects. RetroDash has been used by many of our clients, including 10 of our current JDE engagements, thus saving hundreds of hours of upgrade effort. The tool can be used for upgrade assessment, as well as to identify local customizations for environment consolidation. Few of our customers run this tool periodically to keep track of JDE customizations. The tool has been validated and often recommended by Oracle as one of its kind available in the market.

About the Author



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Ravi is a Senior JDE Solution Architect with 13 years of experience in upgrades, implementation, migration and support. He is a Oracle-certified JDE implementation specialist and his areas of expertise include DSI support, data center migration, upgrade and code current.



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