



**ORACLE®**

## **Recommendations for Change Management**

John Hammond

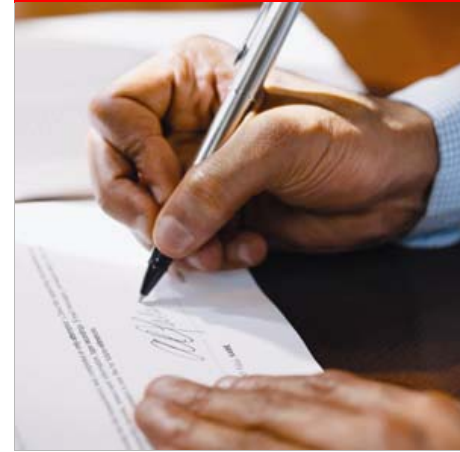
Product Strategy ■ JD Edwards EnterpriseOne ■ Denver, Colorado USA

The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

The development, release, and timing of any features or functionality described for Oracle's products remains at the sole discretion of Oracle.

# Topics

- Terminology
- Principles
- Business Software Cycle
  - Implementation
  - Production
  - Upgrade
- Summary
- Q & A



# Terminology

---

# Change Management Terminology

## Patches

<b>ESU - Electronic Software Update</b>	A cumulative fix to problem reported on a specific JD Edwards EnterpriseOne application or report.
<b>Update</b>	All fixes available since the a release was introduced. Updates are aggregate packages of application fixes.
<b>Baseline ESU</b>	An ESU that has been packaged as a static deliverable. Baselines reset dependencies, allowing for smaller subsequent ESUs and are prerequisites for new fixes which affect objects in the baseline.
<b>Tools Release Patch</b>	A cumulative fix to a problem reported in JD Edwards EnterpriseOne foundation (System) code.
<b>Critical Patch Update</b>	A quarterly, cumulative fix responding to security vulnerabilities.
<b>Tools Release</b>	All fixes available since the previous Tools Release was introduced. Tools Releases are aggregate packages of foundation (system) fixes.
<b>Planner ESU</b>	Enhancements or fixes to JD Edwards EnterpriseOne applications used during installation, upgrades, and updates. These are used to update the Deployment Server.

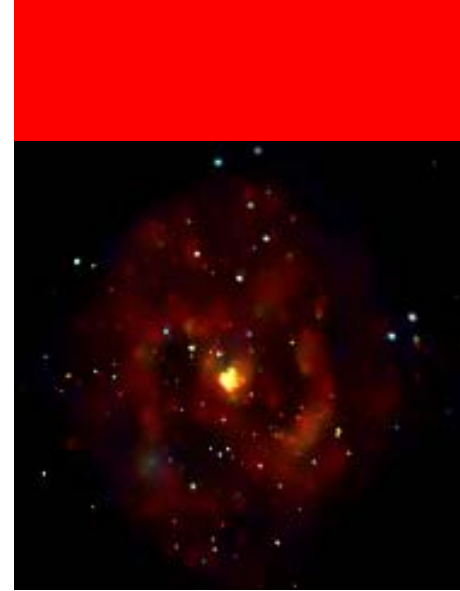
# Change Management Terminology

## Phases

<b>Implementation</b>	Period of installation, configuration, testing and general preparation to use the system
<b>Go Live</b>	Point in time transition from implementation to production – first use of the system to run your business.
<b>Production</b>	Period of using the system to manage your business.
<b>Upgrade</b>	Period of implementing the new release, while staying in production for your existing release.

# Principles

---



# Change Management Practices

## Panic to Planning

### Circa 1990 to 2000

- ✓ If it breaks, fix it

### Today

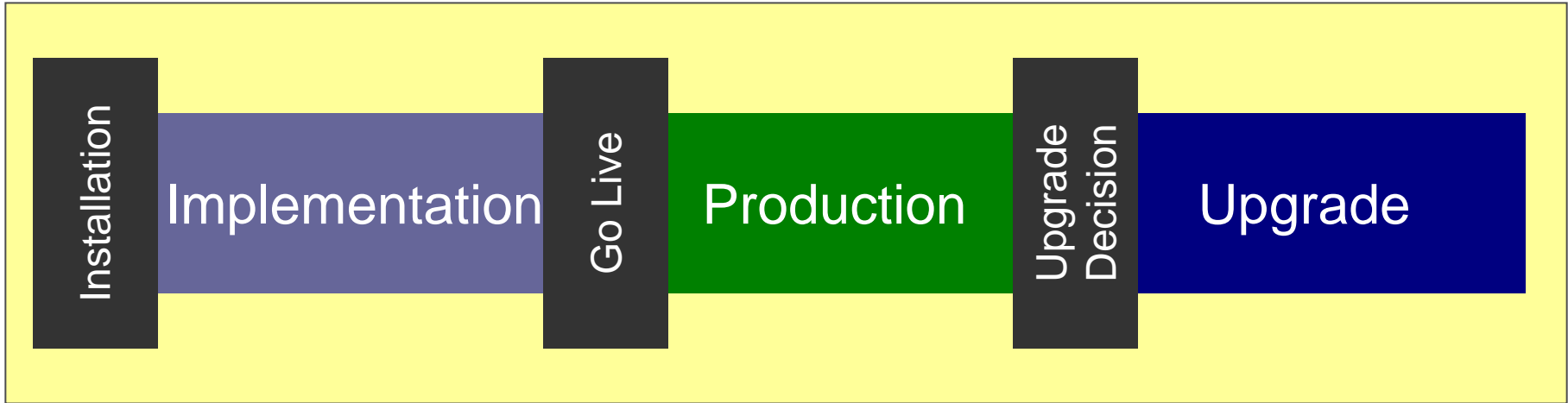
- ✓ Minimize unexpected change
- ✓ Treat different lifecycle phases differently
- ✓ Leverage test efforts
- ✓ Benefit from other customers' experience



# Business Software Cycle

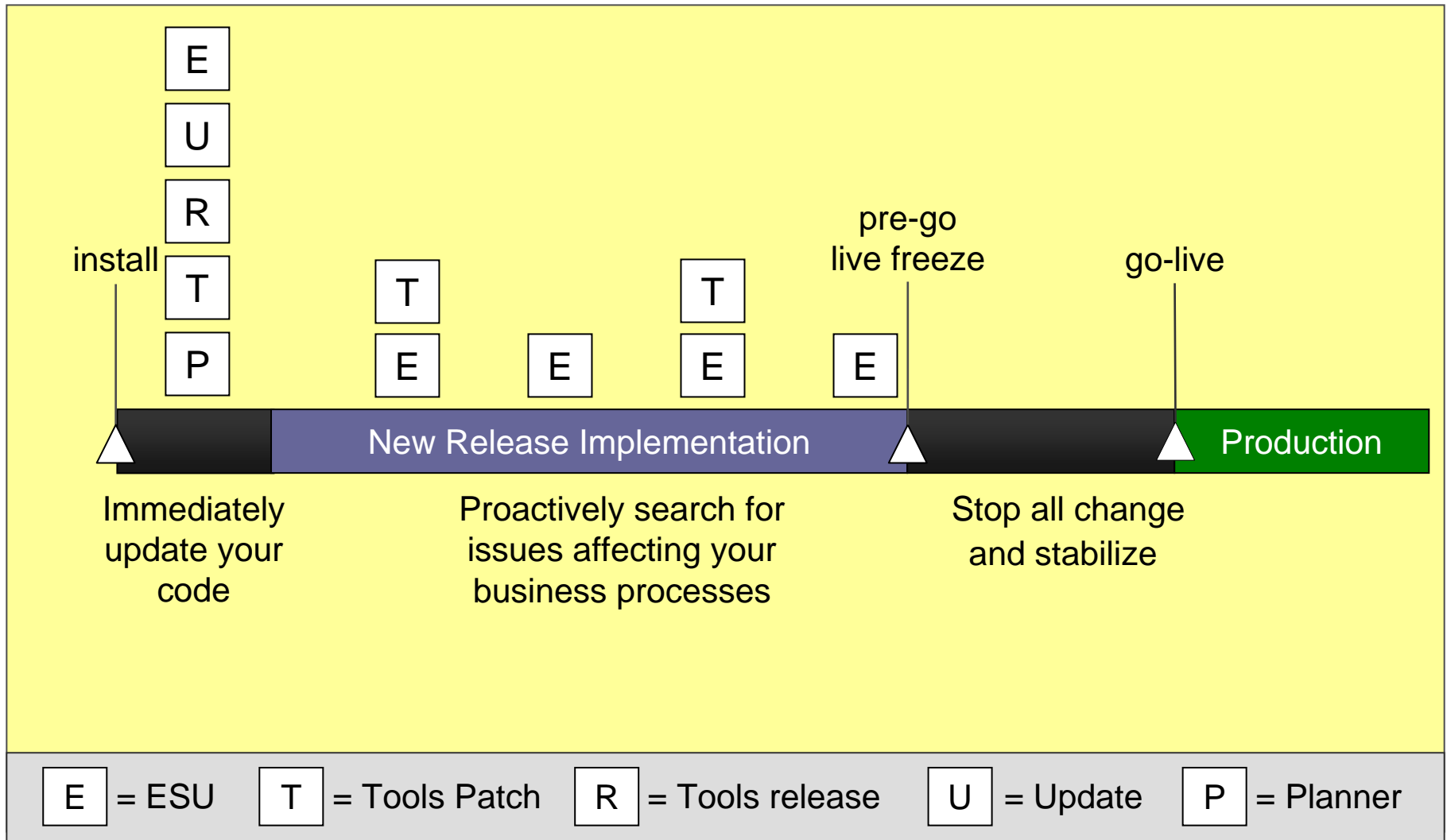
---

# Business Application Lifecycle and Operational Goals



- ✓ Faster go-live
- ✓ Fewer issues
- ✓ Less unplanned change
- ✓ More leverage in testing

# Implementation Timeline





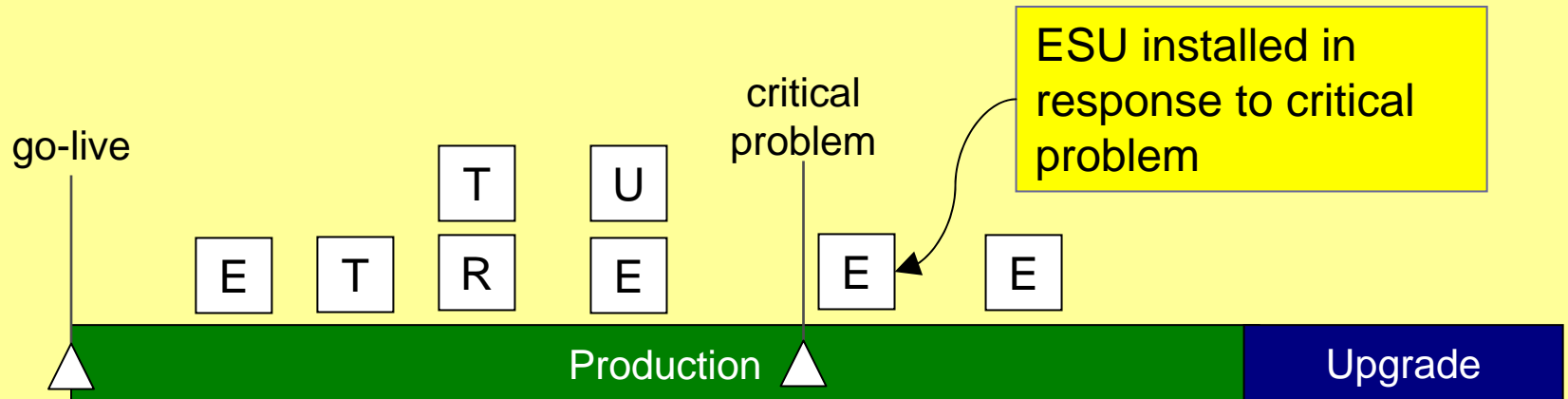
**Felix Grossberg**  
Senior Systems Analyst,  
Chevron Corporation

“...our initial code-currency strategy - based on previous Oracle recommendations - was to take every ESU as it was released. However, we could not keep up, since the volume of patches was unmanageable. ...we refined our strategy to apply all ESUs dated to a certain point in time and after that, apply new ESUs only to address specific issues. We have been following the revised practice since December 2005 and feel that we are handling code-currency adequately: **The system has been stable and we have had no problems getting support from Oracle.**”

# Implementation Recommendations

- ✓ Update your code **immediately** after install
  - Good predictor for success
  - Leverages what other customers have already found
  - Get the benefit of the testing cycle
- ✓ **Search** for new issues using Change Assistant
  - Review critical issues affecting your business processes
  - Identify fixes you will take
- ✓ **Schedule change**
  - Plan times when you will lay down fixes, and deploy them
  - Reduce **reactive** activities by planning for change

# Production Timeline



1. Schedule aggregate change (Tools Release, Updates)
2. Proactively search for individual issues

**E** = ESU    **T** = Tools Patch    **R** = Tools Release    **U** = Update    **P** = Planner

## What Hobby Lobby is Saying

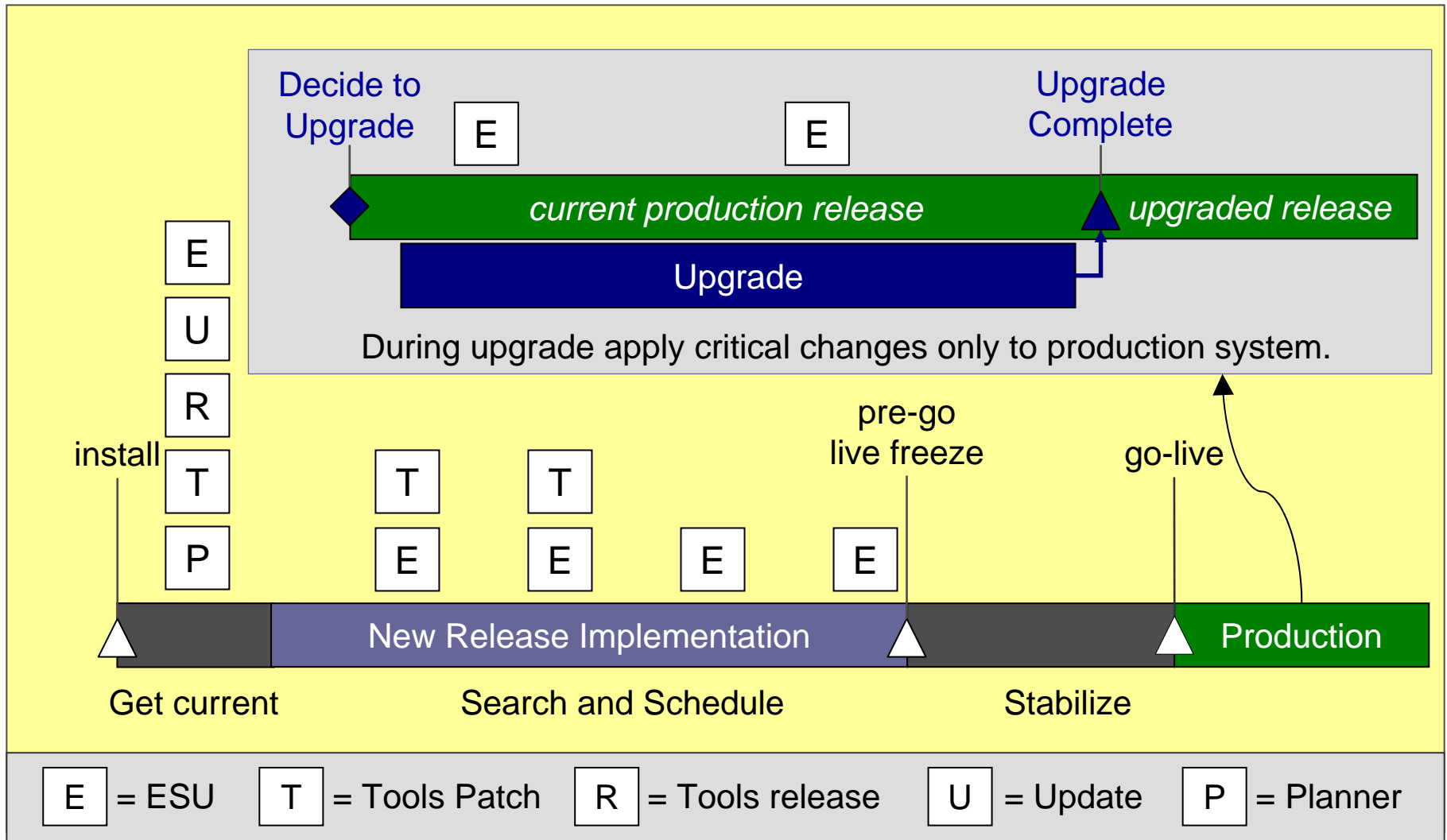
“The **Change Assistant simplifies our job** by putting together easy to read Net change documents for ESUs, which allows us to distribute the information to our Core Team for testing. This way they know the specific objects they need to **focus their testing** on, and it allows them to directly link to the SARs to gather specific information on what changes were made to those objects”

Jamie Adamson, I/S – CNC Administrator, Hobby Lobby

# Production Recommendations

- ✓ Plan for aggregate fixes and stay current
  - Use Tools releases and Updates to stay current
  - **Schedule** adoption, including testing effort
  - When taking an update take relevant ESUs at the same time
- ✓ Continue proactive searching
- ✓ Slow rate of change over time
  - Always consider the **first** Update
  - Subsequent Updates may be optional for stable environments

# Upgrade Timeline



## What Amcor Sunclipse is Saying

“After being live on 8.10 for over a year, our main objective was to **resolve outstanding issues and prevent new ones** as we moved more of our business from World to EnterpriseOne. To establish a stable baseline, we applied both Update 1 and other available ESUs. This required a significant effort in planning and executing our strategy. Now that it is complete, we have the foundation in place to move forward, and are finding **very few new issues.**”

Jesse Valdez, Senior Project Manager, Amcor Sunclipse

# Upgrade Recommendations

- ✓ Current, Production release
  - Minimize investment
  - Only take critical fixes
  - Stop all proactive searching
- ✓ New, Implementation release
  - Use Implementation recommendations
  - Get code current
  - Use resources for Production to manage

# Summary: Manage Change with Lifecycle Stages

- Change management is best managed differently in different lifecycle stages
- Scheduling and planning for change will reduce business disruption
- Carefully consider and create a change management strategy

# Resources for Change Management

- Schedule of JD Edwards EnterpriseOne updates by release  
[www.peoplesoft.com/corp/en/doc\\_archive/pub\\_library/cc\\_home/060501e1\\_update.jsp](http://www.peoplesoft.com/corp/en/doc_archive/pub_library/cc_home/060501e1_update.jsp)
- Schedule of JD Edwards EnterpriseOne Tools Releases  
[maintenance.peoplesoft.com/softwaredownloads/SP/Schedules/Main.html#894](http://maintenance.peoplesoft.com/softwaredownloads/SP/Schedules/Main.html#894)
- White paper  
[http://www.peoplesoft.com/media/cupa/pdf/e1upgrade\\_chg\\_mgmt.pdf](http://www.peoplesoft.com/media/cupa/pdf/e1upgrade_chg_mgmt.pdf)
- Update Center (includes Change Assistant download)  
[www.peoplesoft.com/corp/en/update\\_fix/kgwrapper.jsp?app=uc](http://www.peoplesoft.com/corp/en/update_fix/kgwrapper.jsp?app=uc)
- JD Edwards EnterpriseOne Upgrade web site  
[www.peoplesoft.com/corp/en/iou/upgrade/e1\\_upgrd\\_resources.jsp](http://www.peoplesoft.com/corp/en/iou/upgrade/e1_upgrd_resources.jsp)

ORA

**ORACLE®**

Copyright 2007, Oracle Corporation. All Rights Reserved.