

Textile Provider with Unique E1 9.2 Upgrade Project

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COLLABORATE19
TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

Session ID:
108410

Prepared by:
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April 9th, 2019

#C19TX



Craig Davied

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Executive summary

Craig is a Director with Grant Thornton in the Technology Solutions practice. He has over 20 years of consulting experience, across a diverse set of companies and industries. Craig's experiences include planning and program management of multi-faceted implementation projects, hands on management and implementation of ERP software packages, business process reengineering and system architecture design.

Prior to Grant Thornton, Craig was a founding member of MarketSphere's JD Edwards practice in 2002 and was responsible for managing and delivering projects, practice development, solution design and staff management. He has deep experience with the processes and configuration of the JDE Finance and Distribution modules, specifically with the General Ledger, Accounts Payable, Accounts Receivable, Job Cost, Contract Billing, Procurement / Subcontracts, Sales, Inventory, and Advanced Pricing. Craig also has experience with multiple releases of the software. Prior to joining Grant Thornton Consulting from MarketSphere, Craig was an experienced consultant in a "Big 5" consulting organization and has over 18 years of professional experience.

Industries

- Consumer Products
- Retail
- Metals and Mining
- Mineral Exploration Drilling
- Construction
- Water Management
- Aggregates
- Pet Food/Manufacturing
- Textiles
- Public Utilities
- Inbound / Outbound Transportation

Education

Bachelor of Science in Business Administration / Finance, Kansas State University

About Grant Thornton



Office locations

59 offices spread across 30 states and Washington D.C.



People

More than **8,500** professionals in the U.S.



Reach

Serve 36% of companies on the 2017 Fortune 500 list and 25% of companies on the Russell 2000 list



Partners

594 partners serving more than 8,000 clients in the nation



Our services

• Assurance • Tax • Advisory





Revenue


GT U.S. net revenue equals **\$1.74 billion**

stats are as of 07/31/2017

Our Oracle Practice

- 
ERP and SCM

Financials | Revenue management | Accounting hub | Project accounting | Risk management | Project execution | Procurement
Inventory management | Cost management | Maintenance | Manufacturing | Order management | Product lifecycle and
data management | Supply chain collaboration and planning
- 
EPM Analytics

Planning and budgeting | Profitability and cost management | Financial close and consolidation | Tax reporting and provisioning
Management and operational analytics | Narrative reporting | Account reconciliation | Enterprise data management
- 
HCM

Culture journey | Talent acquisition | Workforce administration | Talent management | Workforce development Alumni
network

Data governance & cloud integration
PaaS
Solution delivery center (off-shore and on-shore)

Industries								
Construction, Real Estate & Hospitality	Consumer And Industrial Products	Energy	Financial Services	Health Care And Life Sciences	Not-For-Profit Organizations	Private Equity	Public Sector	Technology


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Our JDE Practice

80+ dedicated professionals in U.S.

Project management and functional expertise

- Specialized functional resources
- Project management office
- Implementations
- Upgrades
- Mobile applications
- Third party integration architecture
- Business process re-engineering
- Managed services (functional)
- User materials and training

- Financials
- Distribution
- Manufacturing
- HR / Payroll
- CAM
- Project advisory

Technical

- CNC
- Development
- Workflow
- Security management
- Technical management
- Database management
- Infrastructure / hosting
- Managed services (technical)
- Private cloud
- Disaster recovery
- Security
- Development (FRICE)

Trusted business advisor

- Gap assessment
- Transformation
- Industry point of view
- Proven methodologies
- Process excellence
- Benchmarking
- ERP governance
- Data governance
- Master data management
- Reporting strategy
- Change management
- Cloud roadmap / strategy
- FASB planning
- Chart of accounts optimization



Oracle leadership

- The Leading Oracle Platinum Partner presenter at COLLABORATE, INFOCUS and OpenWorld conferences (more presentations than any other Platinum partner in the past 3 years)
- Featured in PROFIT magazine – JD Edwards Special Issue
- Teaming with JDE product development – we work with JD Edwards on enhancing the code base for customers (e.g. OneView Reporting, Revenue Recognition, Leasing Standards, Configurator)



Experience and recognition

- More than 250 JD Edwards implementations and upgrades as a practice
- Over 20 implementations in the past 5 years
- Over 50 upgrades in the past 5 years
- 2017 JD Edwards Partner Excellence Award for **User Adoption**
- 2016 JD Edwards Partner Excellence Award for **Vertical Industries**
- Oracle JD Edwards recognized Grant Thornton with its 2014 and 2015 JD Edwards Partner Excellence Award for Outstanding **Upgrades**

Agenda

- Company background
- Project in review
- Lessons learned
- Final thoughts
- Q & A

Company Profile

- Textile provider for customers in both healthcare and hospitality industries
- Approximately 500 employees
- Approximately 5,000 stock SKUs
- Configured products division
- 10 Distribution centers
- 5 Manufacturing locations

Prior to the start of the project...

- Project had technically started internally many years ago...
- Worked on in spare time, after production responsibilities were complete
- Business system analysts lead; Minimal business participation
- Utilized consultants in staff augmentation role
- Work performed in silos; Minimal collaboration across areas
- Primary focus was centered around entering orders and shipping/receiving; back office accounting/finance functions were not discussed
- Leadership not committed to project...

Waves of Change

- Leadership now committed to the project
 - Executive Steering Committee (ESC) established
 - 2 Executive sponsors – Business & IT
 - 3 Person PMO – Business, IT, Consulting
 - Change management team
- Business involvement
 - Business leads and Subject Matter Experts – 40 team members
 - IT Business analysts / Consultants for each module/area
 - Sales / Pricing
 - Make to Stock
 - Make to Order
 - Procurement / Inventory
 - Transportation
 - Manufacturing
 - Finance and HR
 - Additional Functional, Development and CNC resources added

Scope of Upgrade – to E1 9.2

- Primary Objectives
 1. Upgrade Sales, Pricing, Procurement, Inventory, and MFG from World A7.2 (no standard migration path existed)
 2. Upgrade Finance & HR from E1 9.0
 - European operations would remain on E1 9.0
 3. Implement additional functionality necessary to integrate Distribution/MFG processes with Finance

Upgrade Project – Enhancements

- Implemented OTM Cloud for transportation functions; integrated with E1 9.2
 - Custom freight accrual / voucher match functionality in E1 9.2
- Integrated best-of-breed textile manufacturing system with E1 9.2
- Re-designed custom web-based sales configurator tool; Integrated with E1 9.2
- Implemented MFG accounting / Product costing functionality
- Implemented standard EDI functionality/processes
- Implemented 3rd party job scheduling tool

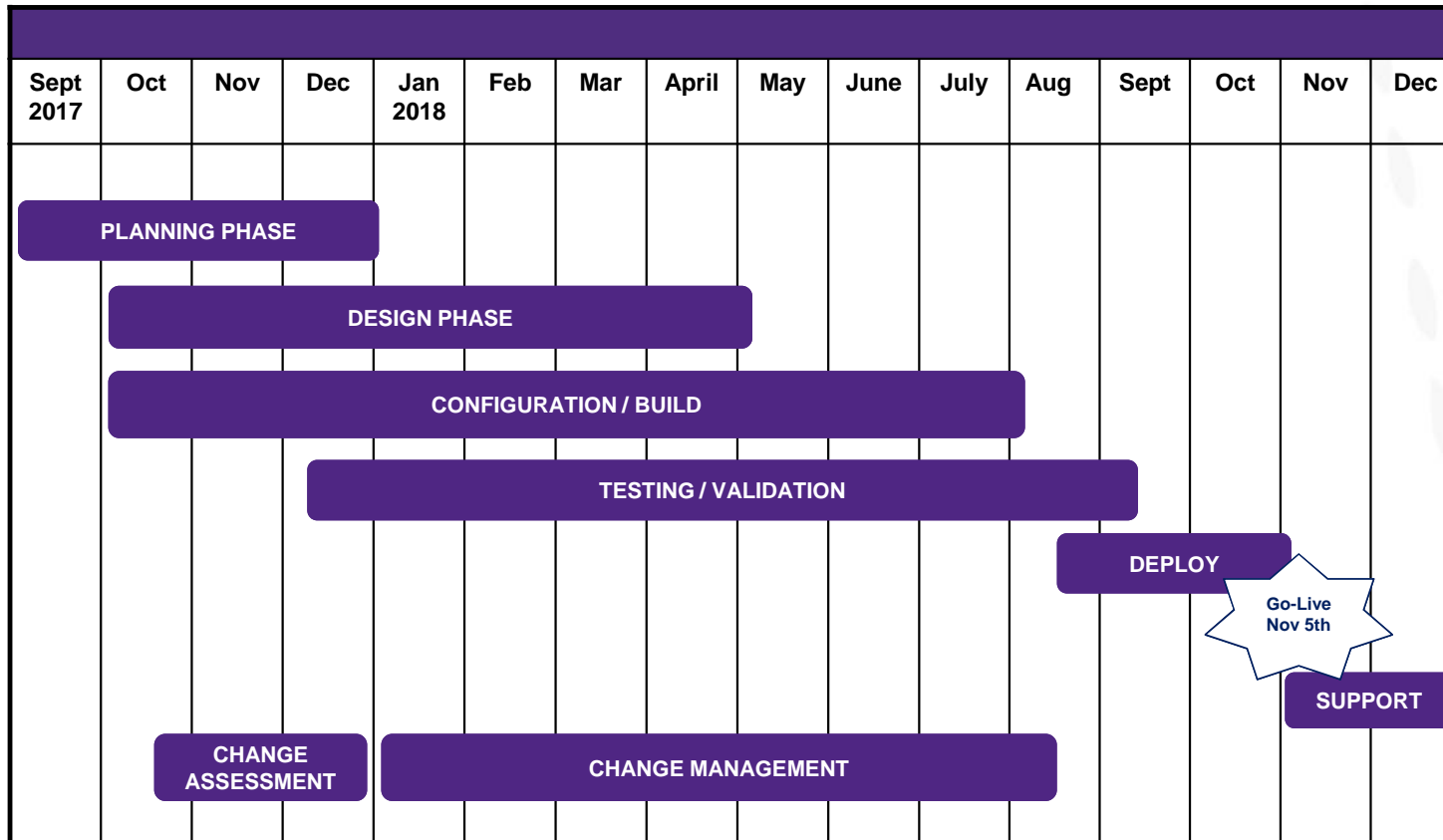
Upgrade Project – Enhancements (cont.)

- Re-designed custom commission processing functionality
- Re-designed custom rebate processing functionality
- Implemented advanced pricing functionality
- Enhanced extraction programs from E1 9.2 into custom data warehouse for reporting
- Implemented 3rd party reporting tool for operational needs
- Implemented E1 role based security (with segregation of duties)

Project Challenges

- Company had never been through a project of this size or complexity
- JDE World software had been heavily modified for past 20+ years
- Historically, IT management had used consultants in staff augmentation role only
- Numerous data issues; Many poor practices for data entry without proper system validation
 - Was unable to correct legacy programs which continued to generate data issues
- Existing World CL programs had to be kept in some situations; Existing customizations surrounding these programs caused issues

Project Timeline



Project Management / Tools

- ESC monthly meetings
- PMO weekly status meetings
- Change Mgmt Bi-weekly meetings
- Weekly team status meetings
- Modular team work plans
- AIR log / process
 - Actions
 - Issues
 - Risks
- PMO approval process for all development & critical design areas
- ESC Risk Analysis Matrix
- ESC Go/No-Go Scorecard
- Don't forget to have fun....☺

Development

- Implemented SDLC process – both Business and IT participation
 - Included business testing environment
 - Included sand box environment (refreshed from PD nightly)
 - PMO approval process for change requests; business justification form submitted
- Retrofit approx. 3000 objects
- Developed approx. 50 conversions
- Developed approx. 40 interfaces
- Developed approx. 15 forms
- Developed approx. 175 reports (both ERW and 3rd party tools)

Testing

- Numerous cycles / Types
 - Retrofit / Unit testing
 - CRP testing – all standard functionality
 - iCRP testing – Round 1
 - Two Weeks with additional week for corrections
 - iCRP / UAT testing – Round 2
 - Two Weeks with additional week for corrections
 - Approximately 500 test scripts processed
 - Conversion / Data validation testing
 - Performance testing (ongoing from UAT forward)

Training

- 6 weeks of end user training
- Types: Overview / Functional / Deep Dive levels
- Lead by business leads / SMEs
 - IT Business Analysts available for technical questions
- Primarily conducted at corporate headquarters
- Procedural documentation provided; developed with UPK
- Change management consulting team managed / assisted with documentation
- Department Mgr sign-off that all trainees were ready to use E1 9.2

Communication

- End user surveys throughout project
 - Results discussed in ESC meetings
- Newsletters with project updates sent out monthly
- Training plan / materials
- Lunch Q & A sessions
- Corporate e-mail account for questions / feedback

- Goal was to continuously interact with the business...

Risk Analysis Matrix

- Identification of all potential risks at launch
- Related area of business
- Likelihood of occurring x Impact = Risk score
- Ranked high / medium / low
- Mitigation Owners and Plans

- Reviewed results with ESC
- Monitored throughout project

Go / No-Go Scorecard

- 17 conditions across the below main drivers:
 - Project Delivery
 - External Business Readiness
 - Organizational Readiness
 - System Capabilities
 - Data Quality
- Goal for each condition
 - Red/Yellow/Green acceptance criteria
- Owners assigned to each condition/driver
- Measured each week over the final 8 weeks prior to go-live

Conversion / Cutover Process

- 1000+ step cutover plan
- Completed in approx. 35-40 hours (consecutive unfortunately ☹)
- Multiple toolsets utilized to accomplish all conversion activities

1.) Standard migration from 9.0 →

2.) Conversion programs from World →

3.) SQL data manipulation →

4.) Data validation / Surface testing →

5.) Release business users into new system(s)...Go-live!

Go-Live Support

- Process
 1. Training materials
 2. SMEs / Super users
 3. Help desk
- Two Locations
 - War room / Hot line
 - Command center
- Prioritization of Issues / Enhancements
 - Owners
 - Target completion dates

ERP Governance Task Force

- Business and IT participation necessary in order to be successful
- Management team members included; Manage escalation process
- Weekly/Bi-weekly review of open issues and enhancement requests
- Prioritization based on business justification / return on investment
- Discussion based on impact to all areas of the business
- Business process changes discussed as well
- Set priorities based on monthly or quarterly basis; Must manage small changes as well as larger project initiatives

Lessons Learned

- Value of clear communication at all levels
- Importance of an SDLC - - Checks and balances
- Value in cleaning up legacy data prior to implementation or go-live
 - Conversion complications
 - UDCs
- Defined project roles and responsibilities
 - BAs wanted to lead (Consultants were more staff aug)
 - Modular teams worked in silos; no cross-functional BA

Lessons Learned (cont.)

- Document, document, document...
- Training
 - Need to be functional consultant influenced
 - Natural knowledge transition to team members
- Need to gather/re-confirm business requirements at the start of the project
- Need to document business process flows (incorporate with training materials)
- Make sure you include a proven business partner that you can trust

So what's next?

- Continuous training / re-training
- Focus on the ownership/management of their governance model
- Process simplification / Optimization projects
- Additional user interface features
 - Advanced queries (published)
 - Personal forms (published)
 - Watchlists
 - UXOne features

Final Thoughts

- Many, many new features in E1 9.2 make upgrading more enticing than ever before
- JDE World to E1 9.2 upgrade projects can be challenging, but definitely not impossible
- Need to recognize the impact that this level of change will have on your organization
- Make sure that you select a partner that has strong experience and is "The Right Fit"



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Don't miss these insightful sessions

Monday

- 9:15–10:15 a.m. **ORC strategies for Taleo**
Ken Fontenot, Grant Thornton
CC 3rd FL 303A
- 10:30–11:30 a.m. ***Global transformation cloud deployment of HCM, ERP and more: GP Strategies case study**
Dan Mills, Grant Thornton and Sonia Ardeel, GP Strategies
CC 3rd FL 302B

Tuesday

- 10:30–11:30 a.m. **Maximizing Oracle Payroll in the cloud—a case study on developing a PaaS extension for HCM Cloud**
Chirag Hingrajia, Grant Thornton
CC 3rd FL 303B
- 12:45–1:45 p.m. **You've upgraded to JDE 9.1; now what?**
Mohammad Shujaat, Grant Thornton
GH 2nd FL Lonestar Salon E
- 2–3 p.m. **Textile provider with unique E1 9.2 upgrade project from both JDE World A7.2 & E1 9.0**
Craig Davied, Grant Thornton
GH 3rd FI Travis B
- 4:30–5:30 p.m. ***Implementing Oracle Cloud Revenue Management at Valet Living—the good, the bad, the ugly**
Mike Coburn, Grant Thornton and David Boyer, Valet Living
CC 3rd FL 301B

Wednesday

- 8–9 a.m. **Connecting the empire—a case study of ERP Cloud integration automation at Caesars Entertainment**
Lee Huff, Grant Thornton
CC 3rd FL 302C
- 12:45–1:45 p.m. ***Caesars Entertainment's successful transformation to financial reporting on Oracle Cloud ERP**
Prasanna Ramakrishnan, Grant Thornton
CC 3rd FL 302C
- 12:45–1:45 p.m. **Leadership & management in projects—two sides of the same coin**
David Fuston, Grant Thornton
CC 3rd FL 302B
- 2–3 p.m. **Order management/advanced pricing SIG panel discussion: Journey to the cloud**
Bobby Smith, Grant Thornton
CC 2nd FL 225D

Thursday

- 8–9 a.m. ***Tax Reporting: Impact of the US tax reform**
Julien Coudrette, Grant Thornton
CC 2nd FL 217C
- 9:15–10:15 a.m. **Enhancing business processes with Procurement Cloud document approvals**
Bobby Smith Grant Thornton
CC 2nd FL 225D

*CPE credit offered



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