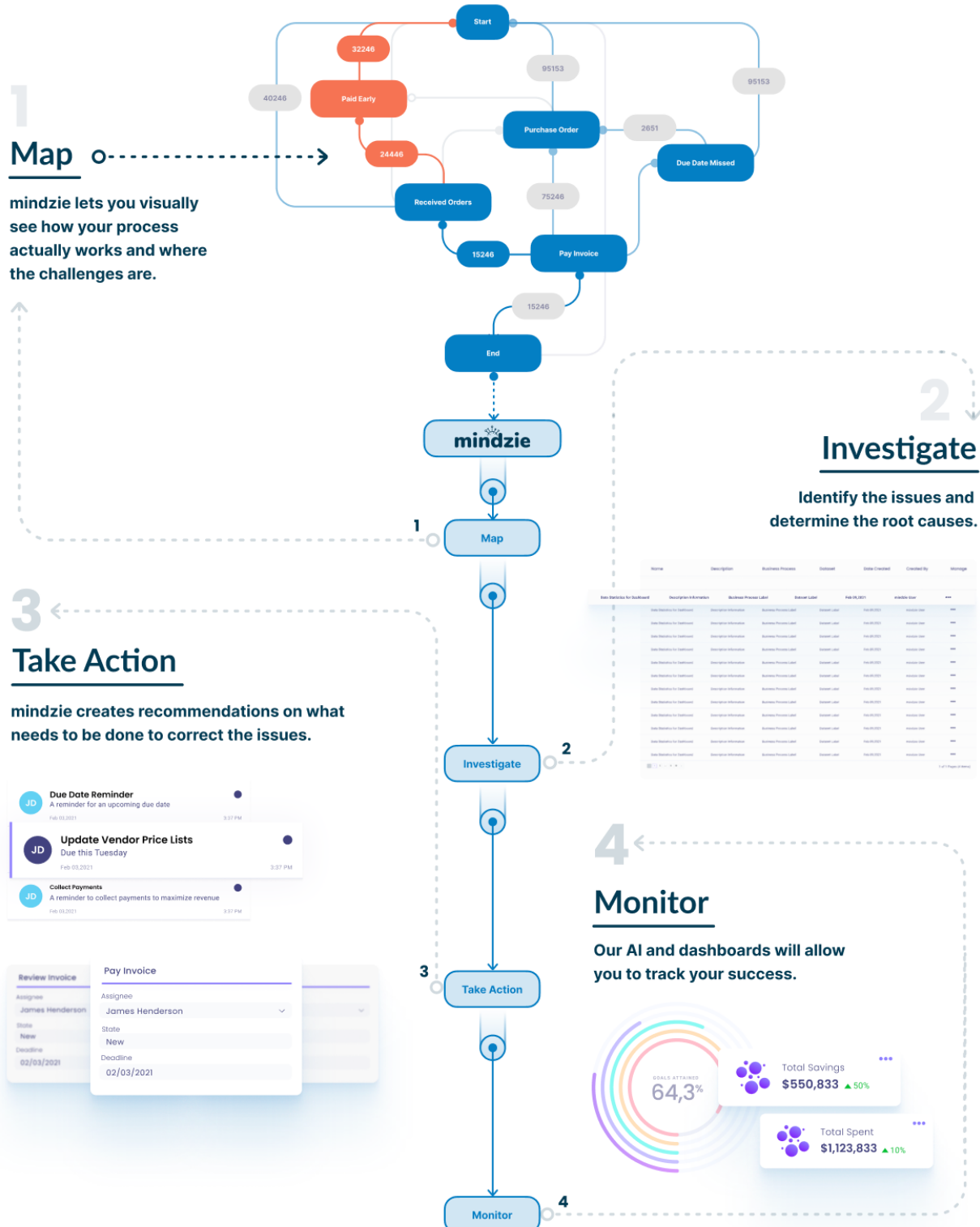# Community Insight

JD Edwards Edition 2021

Sharing of knowledge, experiences and expertise

mindzie

Map, Analyze and Optimize your finance processes to improve Working Capital!

1

Map

mindzie lets you visually see how your process actually works and where the challenges are.

Process map nodes: Start, 32246, Paid Early, 40246, 95153, Purchase Order, 95153, 24446, 2651, Due Date Missed, Received Orders, 75246, 15246, Pay Invoice, 15246, End

2

Investigate

Identify the issues and determine the root causes.

3

Take Action

mindzie creates recommendations on what needs to be done to correct the issues.

- **Due Date Reminder** — A reminder for an upcoming due date
- **Update Vendor Price Lists** — Due this Tuesday
- **Collect Payments** — A reminder to collect payments to maximize revenue

Pay Invoice
Assignee: James Henderson
State: New
Deadline: 02/03/2021

4

Monitor

Our AI and dashboards will allow you to track your success.

GOALS ATTAINED
64,3%

Total Savings
$550,833 ▲50%

Total Spent
$1,123,833 ▲10%

Workflow: mindzie → 1 Map → 2 Investigate → 3 Take Action → 4 Monitor

www.mindzie.com

ORACLE PARTNER

At Quest, you belong.

Ask questions, find answers, swap stories, make connections and learn from other Oracle users.

Quest Oracle Community

Quest Oracle Community is home to 25,000+ users of JD Edwards, PeopleSoft, Oracle Cloud apps and Oracle Database products. We connect Oracle users to technology leaders and Oracle experts from companies who are driving innovation and leading through their use of Oracle products.

As a member of the Quest Oracle Community, you get access to each of our product communties:

JD Edwards
EnterpriseOne, World, Financials, HCM, Supply Chain

PeopleSoft
PeopleTools & Technology, FIN, Enterprise, HCM, SRM

Oracle Cloud Applications
HCM Cloud, SCM Cloud, ERP Cloud and CX Cloud products

Database & Technology
Database, Data Analytics, Platform as a Service, Developer Tools

Why join Quest?

We help you learn
- Oracle Q&A sessions
- Digital events & conferences
- Blogs & white papers
- Special interest groups
- Digital forums

We develop your team
- Build skills
- Expand knowledge
- Increase efficiency
- Improve user experience
- Plan for the future

We connect you
- Expert product users
- Oracle strategy and product development teams
- Experienced solutions providers

We keep you informed
- Semi-monthly newsletters with updates straight from Oracle
- Customizable digest notifications on new events & content

Professional and Corporate members enjoy special members-only programming and deep discounts for Quest digital events and conferences. Join us today!

questoraclecommunity.org/membership

From the Desk of the CEO

Jonathan Vaughn
Chief Executive Officer
Quest Oracle Community

Hello Quest JD Edwards Community!

One of the most impactful benefits of the Quest community is the sharing of knowledge. Members of our community enjoy access to a wealth of expertise, knowledge sharing with other users, insights from solution providers and updates directly from the Oracle product teams – all in one place.

That's why we reimagined INFOCUS 2021 as a **two-part virtual conference series** – INFOCUS Envision and INFOCUS Dive Deep (October 18th – 21st). Now you can connect spring and fall with JD Edwards experts, industry innovators, technology leaders and Oracle product teams for insights, education, and information.

I'm excited to bring you the fourth edition of *Community Insight*. This collection of customer success stories and articles is an excellent example of the knowledge base embodied by the Quest community.

Customer stories are so beneficial to the JD Edwards community. They help others benchmark their own technology adoption, understand product features and benefits, prepare for new technology implementation, and formulate plans for each stage of their journey. We hope this issue will help you and your company do just that. You'll see that the articles and interviews in this issue focus on key JD Edwards concepts: Orchestrator, Journey to the Cloud, Notifications – all topics which users told us were top of mind.

While I'm confident you will learn something from reading *Community Insight*, I encourage you to share your story as well.

Please reach out to **education@questoraclecommunity.org** to tell us about your recent JD Edwards implementation, project, or success – no matter how big or small!

Thanks for reading,

Jonathan Vaughn
Chief Executive Officer, Quest Oracle Community

> *One of the most impactful benefits of the Quest community is the sharing of knowledge. Members of our community enjoy access to a wealth of expertise, knowledge sharing with other users, insights from solution providers and updates directly from the Oracle product teams –all in one place.*

Quest Oracle Community

Serving Oracle's PeopleSoft, JD Edwards, Oracle Cloud Applications, & Database & Technology Users Worldwide

Community Insight is a catalyst to maximize members' business investments through the power of our community, tools, and experiences. We provide relevant, timely, unbiased information and create decision-making tools and networking events to help our members make informed choices – not just related to ERP applications, but to benefit the total information technology and best business practice experience.

Quest, an independent, not-for-profit association with more than 25,000 members and subscribers, focuses on PeopleSoft, JD Edwards, Cloud Applications, and Database & Technology users. Membership is open to all users worldwide.

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859.226.4321

Email
quest@questoraclecommunity.org

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Meet the Quest Staff
https://bit.ly/2EXbM9T

Quest Board Nominations Are Open

Nominations are now open for the Quest Board of Directors (terms will begin January 2022). Our board sets Quest's strategic direction, provides fiscal oversight, ensures necessary resources, represents the members of Quest, and strengthens Quest's programs and services. It is comprised of customer volunteers who use Oracle products. This is a unique opportunity to be a leader for your user community. Self-nominations are accepted until May 28, 2021

Meet the current board

Quest Oracle Community

QUEST DIRECTORS

Todd Campbell
Stratix Corp.

Helen Davis
Suncorp.

Tammy Gaston
Stoner

Paul Krueger
J.B. Poindexter & Co.

John Matelski
DeKalb County Georgia Government

Tom Messer
Tupperware Brands

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Michael Carney
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Tony Schollum
Kaiser Permanente

Officer-at-Large
Bryan Brewer
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Carole Owens
AdventHealth

Officer-at-Large
Rita Tompkins
Yum! Brands

EX OFFICIO

Immediate Past Chairman
Cullin Wible
The Conti Group

Chief Executive Officer
Jonathan Vaughn
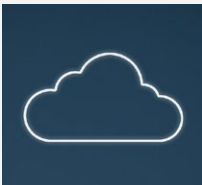Quest Oracle Community

The color-coded names represent those who use **PeopleSoft**, **JD Edwards**, **Cloud**, **E-Business Suite**, or are a member of the **Quest IOUG Database & Technology Community**.
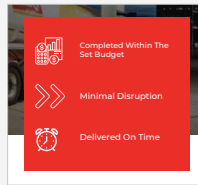
INFOCUS Envision
ALL NEW. ALL DIGITAL. ALL JD EDWARDS.

April 12 - April 15, 2021

CTB, Inc. Makes Big Move from JD Edwards World to Oracle ERP Cloud

Jennifer Leatherman, IT Business Solutions Director at CTB, Inc. spoke with us about their decision to migrate from JD Edwards World Software to Oracle ERP Cloud.

CTB, Inc. is a global manufacturing company founded in 1952 with headquarters in Milford, IN. CTB has 3,000+ employees globally, 1,000+ distributors, 46 manufacturing and warehousing facilities and customer located in 110+ countries.

CTB manufactures the following livestock and agricultural products:

- Grain Storage, Handling, Conditioning and Drying, and Structures
- Poultry Care and Management
- Sow and Pig Care and Management
- Laying Hen Care and Management
- Food Processing, Weighing, Packaging and Software
- Industrial Equipment and Applications

CTB Inc.'s Move from World to Oracle ERP Cloud

What is your history with JD Edwards?

CTB went live with JDE World in February 1998, with an upgrade to A7.3, cum 16 in 2009 and an upgrade to A9.3 in 2013. The most recent upgrade to A9.4 base was completed in 2016 at 11 domestic locations. In 2019, a decision was made to move from JDE World to Oracle ERP and SCM Cloud.

What is your JD Edwards footprint?

CTB implemented Financials, A/R, A/P, Purchasing, Product Data Management, Manufacturing, Order Management, Advanced Pricing and Payroll in 1998 and added functionality as it became available in release updates.

What were your main challenges using JD Edwards World software?

In recent years, our biggest challenge became the lack of automation with many manual processes, shortage of RPG programmers to support our existing customizations, and the added cost of supplementing functionality by adding third-party software to fill the gaps.

Please take us through your decision-making process to upgrade/migrate.

With the end of support for World software looming, we did not want to wait until the last minute to make a decision. In 2019, we decided to spend 2020 working on a roadmap of where we wanted to be as a company in 5-10 years, and the technology needed to support that growth. We spent weeks interviewing potential partners and chose CSS International as our partner to work with us over the life of our project.

Our next step was completing an in-depth discovery workshop to identify our current processes and identify gaps and requirements. We looked at four or five ERP software systems that were reviewed, demonstrated, and analyzed for best fit. Oracle ERP Cloud was the best fit to meet our requirements and allowed us to grow into the future.

What was the main benefit and deciding factor?

CTB made the decision to upgrade our JDE World software to Oracle ERP Cloud for many reasons. Our beginning reason for the upgrade was to replace our software that was at end of life. What we eventually realized is that there were many benefits to the upgrade. By moving to a fully functional, fully integrated system, we are able to lower ongoing cost by reducing the third-party software that we had added over the years. This included maintenance and support, along with licensing.

Although it's a paradigm shift for us to accept quarterly updates, that frequency keeps the software current, adds functionality when available, and promotes standard software content with few to no customizations. This move should take us into the future.

What Oracle Cloud solutions will you implement?

We are implementing the full HCM suite, the full Oracle ERP and SCM Cloud, EPM, GTM, and OTM modules. As part of this migration, we moved from JDE Payroll to ADP, and we had already begun a project to roll out Oracle CPQ.

What is the time frame of the migration?

We began our project in November 2020. We had a planned go-live of HCM at the end of March 2021, EPM and GTM/OTM in May, and Phase 1 of ERP and SCM Cloud in November 2021. We plan to complete Phase 2 in mid-2022.

What is the business value of moving to Oracle Cloud?

We will recognize cost reduction by eliminating various third-party solutions that are included standard functionality

By moving to a fully functional, fully integrated system, we are able to lower ongoing cost by reducing the third-party software we had added over the years. This included maintenance and support along with licensing.

Jennifer Leatherman, IT Business Solutions Director at CTB, Inc

This migration is a big deal. You need support from the top down – not only in change management but in providing resources to make the project successful.

in Oracle ERP. We will also lower support costs, reduce manual processes that are being replaced by automation, and improve efficiencies. Cloud also brings better visibility of integrated data for proactive decision making.

Is there anything else you would like to share?

This migration is a big deal. You need support from the top down—not only in change management but in providing resources to make the project successful. The best team members are typically the same ones that keep your business running. They are the hardest to give up to the project, but the most important for a successful project. Also, choosing a good partner is vital to getting you to the finish line.

How long have you been involved with Quest and how have you benefited from the community?

It seems like I've been a part of the Quest group forever. I remember when JDE was new to me and the World User Group was created. Yes, that long ago!

I feel so fortunate to have dear friends that I have met through Quest. As members, we have learned from each other, shared our successes and things not so successful, but that is how we've supported each other over the years. If one of us has been through it, by sharing our experiences, we can help the next group taking on a new adventure. Being a part of Quest in the past has been my go-to group for answers and help during my JDE years.

A Successful Approach for Addressing Localization Needs in Latin America

Mauricio Santos, **Omron** IT leader, shared the story of Omron's successful strategy implementing Oracle Validated Integration Solutions for bridging localization gaps in Mexico locations.

Why did you decide to implement ITCROSS Fiscal Solution for Mexico?

We know that in Mexico, fiscal laws frequently change, and the idea was not only to address the current needs but also the future ones.

We decided to implement ITCROSS Solution to be agile and quickly comply with Mexico legal requirements but also to simplify and automate some critical processes where localization was involved. Of course, receiving software updates and avoiding long projects in the future because of law changes was key to our decision to go for ITCROSS Solution.

Which localization needs were you facing in Mexico, and why were they difficult to deal with?

The main issue was the XML generation for the invoice, but once we started studying the law further, we identified other needs, such as the UUID invoice number update in every journal entry, the invoice addenda for specific clients, etc.

Did you try to develop customizations to solve these localization issues at some point or other?

Yes, and it was at that moment when I realized that we needed a solution that could be easily maintained and supported.

OMRON

As a global leader in the field of automation, OMRON's business fields cover a broad spectrum, ranging from industrial automation and electronic components to social systems including automated ticket gates and solar power conditioners, and healthcare. At present, OMRON provides products and services in around 120 countries and regions.

Omron implemented JD Edwards in the 90s, and it is now working on the upgrade to 9.2. They carried out the roll-out projects for their Automation and Healthcare businesses in Mexico starting in 2003.

Mexico had experienced important legal and tax changes in previous years, and so had Omron. Those changes affected critical business processes, such as billing and payments in JD Edwards. Developing and maintaining them was difficult and expensive.

Besides, in order to comply with Mexican legal requirements, they analyzed whether to do a JD Edwards customization or implement ITCROSS Fiscal Solution for Mexico, a set of applications developed with JD Edwards toolkit following Oracle development best practices and maintained by ITCROSS.

The project to implement ITCROSS Fiscal Solution in Omron Automation, the first one we did, took only 9 weeks' time.

Do you agree with the idea that implementing an Oracle Validating Integration Solution offers the possibility of implementing new localization functionalities without running a development project?

I agree 100%, plus the support provided by the ITCROSS team makes this task even easier.

Could you share with other clients how much you have reduced costs by taking the Oracle Validated Integration approach?

I think that better than sharing cost reduction information is saying we eliminated the recurrent issues that always required code changes, added some important functionalities that did not exist before, and now I can rely on ITCROSS support for localization needs.

How long did the project take?

The project to implement ITCROSS Fiscal Solution in Omron Automation, the first one we did, took only 9 weeks' time.

Then we implemented it in the Omron Healthcare company. We did not have to buy more ITCROSS Solution licenses, just the consulting services. The project scope here was a bit more extensive than in the first one, as we also implemented some additional functionalities, such as DIOT report and electronic withholdings. We took advantage of the latest ITCROSS Solution release and updated the software version as well. The project for this second company took 13 weeks.

We decided to implement ITCROSS Solution to be agile and quickly comply with Mexico legal requirements but also to simplify and automate some critical processes where localization was involved.

ITCROSS Solutions benefits for JD Edwards Customers in Latin America:
- They are Oracle-Validated Integrations: this means they are developed using Oracle development best practices and work as documented.
- You avoid human error, duplication of tasks, reducing users' time through automation.
- They are configurable! They avoid future development costs in the event of changes.
- They are rapidly implemented.
- You receive updates in the event of legal changes that affect the software.
- Users have access to our Support Desk included in the maintenance fee.

JD Edwards INFOCUS ENVISION

Key Sessions to Attend at INFOCUS Envision

This list gives a brief overview of some of the key sessions available at INFOCUS Envision.
Check out the **full agenda** for an in-depth look at what else is going on throughout the week!

Monday, April 12

Workshop: 1-2-3 Repeat - DIY Audit & Compliance Process
Presented by Dillon Connor, Sherri Conrardy, & Alex Rippingale, ALLOut Security

Workshop: Getting Started with Orchestrations/ Automation
Presented by Humza Qureshi, Circular Edge

Workshop: Using Analytics to Drive Better Management Decisions
Presented by Michelle Werkmeister, Preferred Strategies

Workshop: Utilizing Orchestrator in Manufacturing - Leverage the Power of JD Edwards Orchestrator
Presented by Bryan Rose, Terillium, Inc.

Workshop: JD Edwards: The Future is Bright
Presented by Dan Barford, Jason Batte, & Thomas Colbert, Terillium, Inc.

Innovation & Digitization: How to Succeed in Challenging Times
Presented by Lyle Ekdahl, Oracle

JD Edwards Product Update and Roadmap
Presented by Keith Sholes & Jeff Erickson, Oracle

Tuesday, April 13

Embracing Continuous Innovation to Gain Competitive Advantages
Presented by Jeff Erickson, Oracle

The Continuous Improvement of JD Edwards EnterpriseOne System Administration
Presented by Clayton Seeley, Oracle
Granite's Orchestration Discovery
Presented by Joanne Sunderman, Granite Construction Inc.

Our Digital Journey
Presented by Jayshree Ravi, Z Energy

Orchestrator Product Updates from Engineering
Presented by A.J. Schifano & Darryl Shakespeare, Oracle

How Bull Moose Tube Revolutionized the Customer Relationship through a Digital B2B Portal
Presented by Royelle Robertson, Bull Moose Tube Company

To the Cloud and Beyond with JD Edwards
Presented by Velocity

April 12 - April 15, 2021

Plan for the future. Roadmaps, updates, enhancements & cloud.

In addition to these sessions...be sure to check out available **networking opportunities**, including Coffee & Connect sessions, Special Interest Groups (SIGs), Attendee Match sessions, the Exhibitor Showcase, and networking lounges!

Wednesday, April 14

Digital Transformation in the Present Tense - A Customer Panel
Presented by A.J. Schifano, Oracle

Print Labels with Form Extensions and Orchestrations
Presented by Melody Bivona, PennEngineering

Orchestrating Mobile Applications
Presented by Ervin Rhodes, Oracle

Our Commitment to an Annual Code Current Event; Printpack's Evolving Story
Presented by Christel Craig, Printpack

Enabling Today and Differentiating Tomorrow: Supply Chain Optimization with JDE
Presented by Jason Andrews, CSS International, Inc.

Save Costs for Oracle Training & Documentation – Your UPK alternative
Presented by Cynthia Stahlhut & Tobias Mrozek, datango – a division of PARIS AG

Combating Cloud Creep with Advanced Technologies
Presented by Bill Rehm& John Bassett, GSI

Thursday, April 15

Ask Me Anything: An Interactive Discussion with JD Edwards Executives
Presented by JD Edwards Executives

What is Oracle Doing to Secure JD Edwards
Presented by Pradip Pandey & Terry Kanichai, Oracle

Ask Me Anything: An Interactive Session on UX One
Presented by Srihari Oruganti, Oracle

Developer Panel AUA (Ask Us Anything)
Presented by Daniel Bohner, Amalgamated Sugar Company

The Future of ERP - Navigating the Cloud
Presented by Angela Enyeart, Oracle

E1 Orchestrator to create Configured SO
Presented by Boyan Vukichevich, J.B. Poindexter

ERP Move to Public Cloud & Upgrade to 9.2
Presented by Pierre Kerrinckx, Mathieu Chambraud, Daphne Martin, & Vireak Som, Veolia Water Solutions and Technologies Support

CIRCLE K AND THEIR CONTINUOUS ADOPTION STRATEGY

JD Edwards on Oracle Cloud Infrastructure

Completed Within The Set Budget

Minimal Disruption

Delivered On Time

Circle K Europe serve more than 1 million customers every day. In total, Circle K's European operation covers more than 2,700 stores, the majority of which offer road transportation fuel and convenience products, in addition to unmanned automated commercial road transportation fuel service-stations.

The company has around 15,000 employees across Europe with users of JD Edwards across multiple modules such as Order to Cash, Procure to Pay, Fuel & Stock, Transportation and Retail. The platform has more than a hundred integrations and web services to other systems and circa 160TB of storage in Oracle Cloud.

CUSTOMER CHALLENGE

Circle K Europe had been running JD Edwards 9.1 as their core ERP in a third-party data center for several years. The environment was heavily customized with complex integrations with other systems such as portals, POS, card systems and BI/EPM.

Since 2016 Circle K had been implementing a series of "back to standard" initiatives to remove customizations from the ERP. To accelerate this process and to remain on Oracle's Premier Support, the decision was taken to upgrade to the latest release of EnterpriseOne 9.2 to take advantage of the latest tools available from Oracle while simultaneously migrating the entire system to the Oracle Cloud Infrastructure Gen 2 platform.

THE SOLUTION

Redfaire International proposed a collaborative 4-phase approach which would minimize business impact, shorten the total project time, and deliver all business and IT requirements.

- **Phase 1 – 2019.** Move to OCI Gen 2 and upgrade to 9.2 simultaneously minimizing disruption and consolidating test cycles. Rehost, re-platform and refactor.
- **Phase 2 –2020.** Tools release upgrade.
- **Phase 3 – 2021.** Application Management SLA renewal process incorporating:
  - Code Current as a Service tools release upgrades, ESU impact analysis and customization retrofit (leveraging DWS Dimension)
  - Security as a Service (SOD and role management leveraging QSoftware)
  - Data Management as a Service (archiving, data retention and GDPR leveraging Datawaire)
- **Phase 4 –** On going continuous adoption upgrades to stay code current and benefit from new tools upgrades.

RESULTS

Thanks to deep collaboration between Redfaire International, Circle K and other IT stakeholders over an eight-month timeframe, the 9.2 upgrade and move to OCI Gen 2 were smoothly implemented with minimal disruption, on-time, and on-budget.

As a result of the upgrade to 9.2, Circle K were able to align with Oracle's continuous delivery model that provides incremental innovations to the JD Edwards application and releases on the most current code-line.

Redfaire International's proactive approach to application management delivers rapid adoption of Oracle delivered technology and functional innovations to quickly realize business benefits and transform digital business.

Having access to the latest Oracle JD Edwards tools and features has encouraged more progressive use of orchestration internally and delivered positive business results from strategic automation projects.

The business is leveraging an on-demand Managed Services and IaaS model which will reduce OPEX costs in the future, while the system benefits from being hosted in a faster, more secure and robust Cloud infrastructure. The team has reported significantly more efficient usage of OCI services, with higher performance compute and the number of cores reduced to half.

Automating Manual Processes with Orchestrator at PennEngineering

Melody Bivona, Director of Enterprise Application Services at **PennEngineering**, outlined the business value of the orchestrations they have created. PennEngineering's brilliant use of Orchestrator helped them reduce processing times by 80 percent and automate manual processes for the end users.

PennEngineering®

Headquartered in Danboro, PA and founded in 1942, PennEngineering is a global leader in fastening solutions with over 14 locations worldwide. Key markets include automotive, consumer electronics, data/telecom, medical, and industrial.

What is your history with JD Edwards and your JD Edwards footprint?

PennEngineering has been a customer of JD Edwards for 20 years. We first implemented JD Edwards Xe in 2000 just for Distribution. We are currently on JD Edwards Application Release 9.2 and Tools Release 9.2.4.5 with 600+ users in 12 locations. We use A/R, A/P, G/L, Sales Order Processing, Inventory Management, Procurement, Product Data Management, Forecasting, Material Planning, and Shop Floor Management.

What has been your biggest challenge?

We have a very lean IT department to support all of our internal customers in each of our locations. We don't use custom code, which has enabled us to stay current – but has also limited us in our ability to quickly provide streamlined solutions, until we discovered Orchestrator. Having a JD Edwards developer on our team was not necessary, since we did not modify code, but I like to think that we have developers now with "orchestrations."

Can you give me examples of orchestrations you have created?

Recently, we took two automotive divisions, that had been on heavily customized legacy systems for 20 years, live on JDE. They make components and do large runs of a certain part. Until that part gets to the last one or two processes, they do not know what part it is going to become. They were able to change it to a different part in their legacy system in a drop down.

The challenge was to take a work order, have the end user complete it, create a new work order, issue the components for that work order we completed, and print a router for the new work order in one step. We were able to create an orchestration to do this and to call it from DSI.

It took two hours to design and document and four hours to develop and test. We were able to take that same orchestration and use personal pages and form extensions to

create an automated process for administrative users for an outside operations process.

We go through this process many times a day. The orchestration has reduced the time spent by 80 percent and reduced the number of data entry errors due to the simplified process.

Very impressive! How else have you used Orchestrator?

A division needed to print customer labels from JD Edwards for a new line as part of the shipping process. We wanted to create a label without having to switch screens. This process typically would take about 20 steps to complete from the user. The plan was to bring up all of the data on the screen while shipping and use the data and pass it on to an orchestration that would then send it to the Print Server and print the label.

We combined all the steps into an orchestration, which we called from a form extension. The process took four hours to design and one day to develop and test.

As a result of this orchestration, the process time was reduced by 80 percent and eliminated human errors. Orchestrator made this process very simple for the end user.

What is the main benefit of Orchestrator?

We have many orchestrations, but my favorites are the ones that makes a difference for the end users. The orchestrations we have created have made the end users more efficient and the data more accurate. The more accurate our data is, the better for our company. We have cut processing time by 80 percent with some orchestrations. The beauty is that we are not customizing code, just using JD Edwards tools that we already have to solve business issues. It is a citizen developer tool for the business analyst. Couple our knowledge of the business processes with Orchestrator and our team is unstoppable!

What advice would you give other users getting started with Orchestrator?

Orchestrator is a gem and worth every effort. We attended an Orchestrator workshop through business partner, **ACBM Solutions**, and I would recommend that users who are new to Orchestrator do the same. I would suggest starting with something small that is a time saver for the end user and then go on to more complex processes. Your creativity is the only roadblock.

What are your future plans?

We have many ideas for orchestrations. We would like to replace our custom labeling system, implement time and quantity tracking on the shop floor, and replace many of our bolt on solutions.

How long have you been involved with Quest and how have you benefited from the community?

We have been Quest members for four years. I presented with **ACBM** at COLLABORATE 2019. It was a very rewarding experience, but also so great to see all of the uses of orchestrations. A big benefit of the Quest community is to discover how others are using the software, share use cases and successes. It has strengthened our knowledge and creativity.

How Atrion Realizes Value from Upgrade to 9.2 + EnterpriseOne Notifications

Trent Compton, Corporate Director of Information Technology at **Atrion Medical Products**, Inc, walked through Atrion Medical's upgrade to JD Edwards EnterpriseOne 9.2 after 20 years on XE and the value they realized from the new features and functionality – especially Notifications.

Atrion Medical Products, Inc. is a leading manufacturer of medical devices. Atrion Medical was founded in 1968 and was FDA-registered in 1976. Atrion Medical is also ISO certified. It sits on a 110-acre campus with 116,000 square feet of production space. There is also an on-site guest house on campus, so customers and vendors can easily visit the site.

Atrion Medical is made up of less than 200 employees – a third of whom have been with the company for over 15 years. They sell product in 20 countries and works with the world's leading ophthalmic and life sciences companies. Atrion Medical works primarily with inflation devices, ophthalmic items, needle safety, and contract manufacturing.

The parent company, Atrion Corporation (ATRI), primarily manufactures medical products. There are under 700 employees across three divisions in Florida, Texas, and Alabama. Additional branches of **Atrion Corporation** include **Quest Medical** and **Halkey Roberts**.

Atrion Medical's JD Edwards Footprint

Back in 1998, Atrion implemented JD Edwards B732 and quickly moved to XE in 1999. After 20 years on XE, Atrion upgraded to JD Edwards EnterpriseOne 9.2 in 2019. The corporate ERP system moved to 9.2 in 2020, and they are in works of implementing 9.2 at Quest Medical in 2021 and Halkey Roberts in 2022.

Why Upgrade to 9.2?

When asked why they needed to upgrade, Compton stated the obvious – they were behind on upgrades as it had taken them 20 years to upgrade from XE to 9.2. JD Edwards XE wouldn't run on a modern operating system or a modern SQL Database, and security patches were a concern. Besides the logistic reasons, another reason was simply that they wanted to take advantage of the new features, workflows, integrations, etc. to provide corporate-wide solutions with JD Edwards EnterpriseOne.

9.2 Upgrade Lessons Learned

Compton shared some of the lessons learned from Atrion's 9.2 upgrade:

- Have the right implementation partner
  - Atrion utilized **Circular Edge**
- Have the right team leads
- Get support for team leads
- Involve as many key people as possible
- Deploy new features and functionality
- Beat the deadlines in the project plan
- Set a realistic go-live date
- Test, test, test!
- Train, train, train!
- Communication is key

The Value of EnterpriseOne Notifications

Atrion wanted to implement Notifications to help users stay on top of and respond quickly to situations. Initially, Atrion planned to implement 30 of the 70 out-of-the-box delivered Notifications. They received 10 custom requests prior to go-live and many more since go-live. Users are finding them extremely useful!

Atrion was looking to advance its strategy of focusing on customer needs and responding quickly to new and increasing customer demands. That's why Atrion quickly rolled out notifications using out-of-the-box functionality to achieve better insights into sales, orders, payments, and customer data while automating processes across sales, finance, and more. A few examples of Notifications that Atrion utilizes include:

- Sales orders that are ready to ship
- Purchase orders that are late
- Work orders that are overdue
- Hot components received
- QA sample test completion – PO Receipts
- QA sample test completion – Components / FG
- Sales order acknowledgements uploaded

Users are utilizing a variety of notification types, including Simple Notifications, Watchlist Notifications, Orchestration Notifications, and Notifications that use third-party integrations.

Some of the questions that arose when looking at the list of 70 delivered Notifications included:

- How do we choose which to use?
- Who edits and creates them?
- How do I learn to build them?

As they looked through the list, Compton said it was mainly common sense that drove the decision on which Notifications to use. He mentioned that it's important to go to the end users that are doing the daily work to see what Notifications will help them work more efficiently. As far as who creates them, Atrion decided to limit that to only its IT team or partner Circular Edge. Having too many people working on them can be messy, so they implemented a formal request process that ensures they are created right the first time. Oracle documentation and videos are a great resource for learning how to build Notifications.

Notifications Lessons Learned

Compton shared some of the lessons learned from Atrion's experience with Notifications:

- Have a formal request and approval process for developing Notifications
- Make sure department leads agree with what is being developed to avoid redoing Notifications
- When writing Notifications, include a direct link to the application involved so recipients can go directly to the application from the Notifications
- Communicate to the user base when new Notifications are published
- Include simple instructions for subscribing to Notifications

To learn more, check out **Atrion's presentation** from last October's INFOCUS 20 event, where Trent Compton was joined by the Circular Edge team to present several use cases and demos.

Resources for the JD Edwards Community

There are many great resources out there for the JD Edwards user community. To help manage your business and maximize the value of your software investment, below are a list of resources we feel are important for any JD Edwards user to know about.

Oracle JD Edwards Resources
Visit **www.learnjde.com** to access more JD Edwards resources.
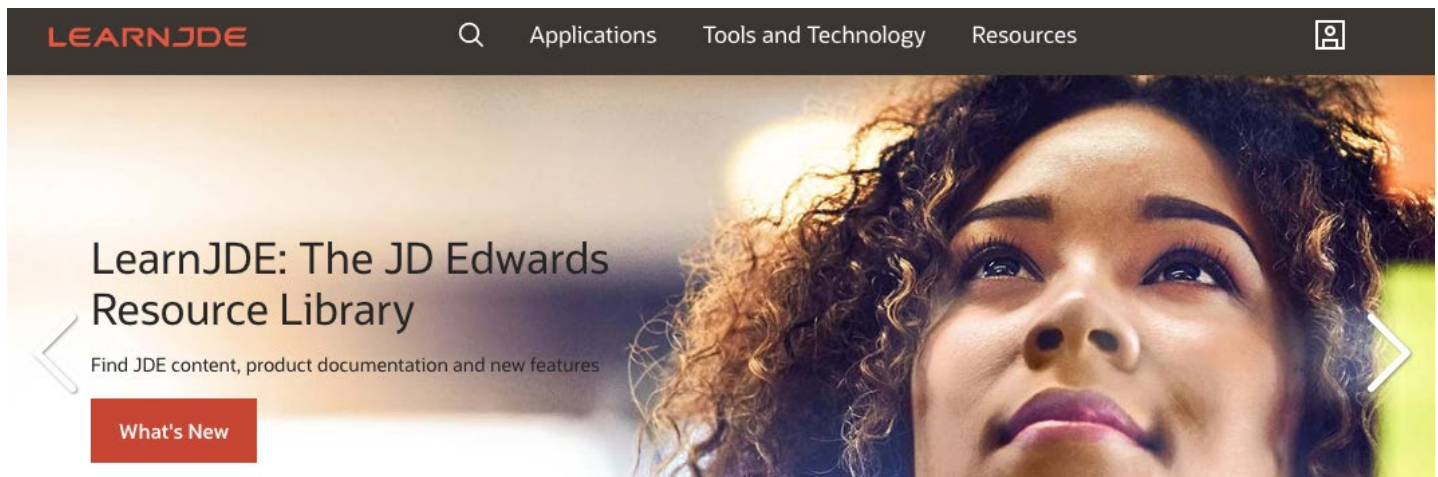
Official JD Edwards Newsletter
Sign up for the only official JD Edwards Newsletter that gets delivered to your email inbox every month.

LearnJDE
LearnJDE is your one-stop shop for JD Edwards resources, where you can find all types of supporting resources from documentation, tutorials, videos, data sheets, and much more.

My Oracle Support for JD Edwards
Need help? Find it at My Oracle Support. Oracle's one-stop online technical support portal offers a wealth of resources for Oracle Premier Support customers. You can search knowledge, participate in communities, log and track service requests, sign up for alerts, view product health recommendations, download product updates and patches, take advantage of Oracle Maintenance and Upgrade Advisors, and much more.

Advisor Webcasts
Oracle's Advisor Webcasts are live presentations given by subject matter experts who deliver knowledge and information about Oracle services, products, and technologies. You can review a current schedule as well as archived recordings on Advisor Webcasts: Current Schedule and Archived Recordings.
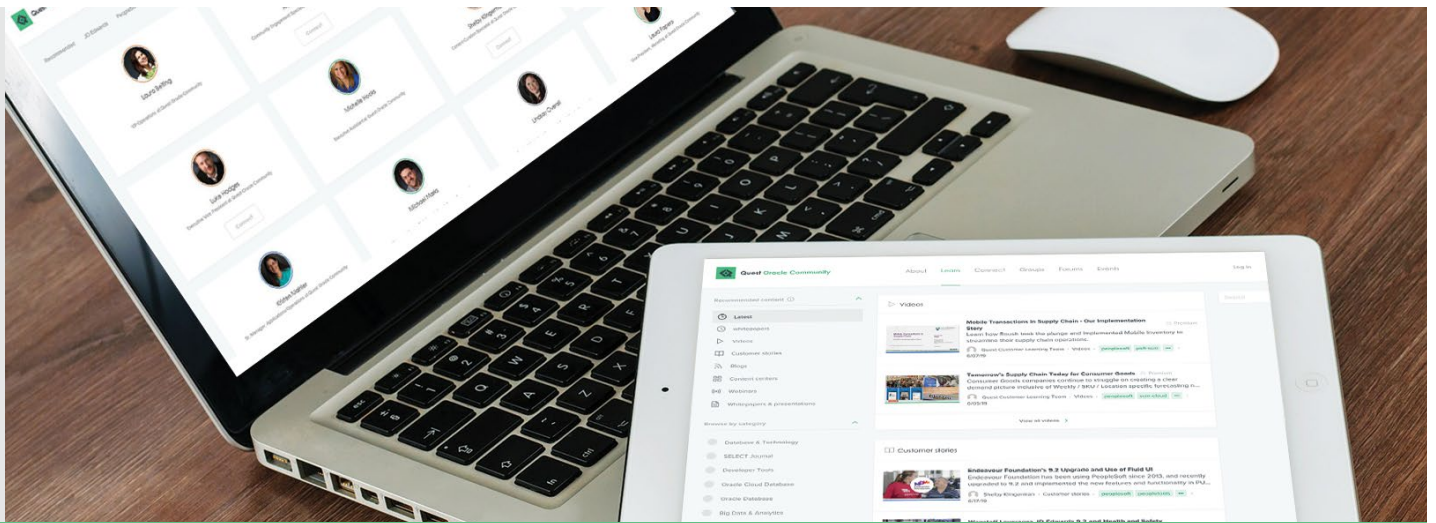
Support Blogs
Stay current on general support news and updates using the JD Edwards EnterpriseOne Support Blog and the JD Edwards World Support Blog.

JD Edwards on Social
Connect with JD Edwards:
• LinkedIn **JD Edwards Professionals**
• Blog **Attitude@Altitude**
• Twitter **@OracleJDEdwards**
• Instagram **@oraclejdedwards**
• YouTube **Oracle JD Edwards channel**

Online Learning
Leverage insight from across the JD Edwards community by joining one of Quest's free online learning sessions.

JD Edwards Customer Stories
These topic-specific stories are collected and curated by Quest's staff editor to showcase what JD Edwards customers are doing and how they are optimizing their systems.

Special Interest Groups
Join a JD Edwards SIG to discuss, network, and share best practices with other users who have similar interests, are in the same industry, or are using the same products as you.

JD Edwards Blogs
These blogs from Quest staff and guest bloggers offer insight into the latest JD Edwards developments across pillars and industries as well as tips, tricks, and important announcements.

Quest Events
Quest's user-led and user-focused JD Edwards events are great ways to connect and learn from your peers, the Oracle JD Edwards team, and thought leaders on a global, regional, and local scale.

JD Edwards INFOCUS
Exclusively for JD Edwards users, INFOCUS has been reimagined for 2021 as a two-part virtual conference series (INFOCUS Envision and INFOCUS Dive Deep) that connects hundreds of IT leaders and business users to JD Edwards experts, industry innovators, technology leaders and Oracle product teams for insights, education, and information. Don't miss INFOCUS Dive Deep on October 18-21, 2021!