DWS Client Success Story

DWS partnered with CSS to achieve a Zero Defects Upgrade for Placid Refining

The Challenge

About the Client

Placid Refining Company LLC is an independent, privately held petroleum refining company located in Port Allen, Louisiana, directly across the Mississippi River from Baton Rouge.

The refinery is the company's only manufacturing facility and it produces a full range of transportation fuels, which are distributed across the southeastern United States from Louisiana to Virginia.

Independent refiners such as Placid play a critical role in the nation's economy and are an important source of transportation fuels for independent jobbers and retailers.

JD Edwards EnterpriseOne Upgrade

Placid engaged CSS to lead its implementation of JDE

PLACID

EnterpriseOne 8.12 in 2008. It is critical to the operations of the business. As a principle, Placid wanted to use native JD Edwards wherever possible and minimize any customizations. However, due to the specialized nature of some of Placid's requirements, such as management of motor fuel taxation, it needed to develop a small number of custom objects.

Placid has 35 users and runs the JD Edwards modules GL, AP, AR, FA, AB, SO, Advanced Pricing, IM and AM.

Although later releases of EnterpriseOne have brought significant additional and improved functionality, none of these enhancements addressed those aspects that had necessitated custom developments.

Snapshot

The Client

Placid Refining is an independent privately held petroleum refining company.

The Challenge

To upgrade its JD Edwards system whilst preserving critical custom code and controlling upgrade costs and timescales.

The Delivery

CSS partnered with DWS to analyze and scope the effort required to perform the upgrade. DWS used its proprietary tools to upgrade for a fixed price and within a short fixed timescale.

The Result

The upgrade was delivered one week early, with zero upgrade defects.

However when Oracle announced the withdrawal of support for 8.12, Placid decided to upgrade to 9.1 as it dared not put its business operations at risk by running on unsupported applications.

Other considerations included the need for EnterpriseOne to continue to integrate and interact with other more modern systems, so Placid took the decision to modernize the whole JD Edwards IT environment, which by this time was getting quite old.

CSS led the implementation effort and was involved in the development of the key custom objects when Placid originally implemented JD Edwards. CSS also provided support services to Placid and the original CSS developers were still available.

Placid's management were conscious that upgrading JD Edwards can be a complex process and costs can become extravagant. Overruns on budget and time were potential risks they wanted to avoid. It was also important to preserve the customizations as they were critical to the business.

Placid had never experienced a JD Edwards upgrade before. Rather than educate a new IT services provider about the way Placid worked and risk misunderstandings relating

to the custom code, Placid opted for the low risk solution in choosing CSS to lead this important project.

It was important for Placid to understand how much work and rework effort would be required to upgrade E1. Whilst CSS has broad JD Edwards development expertise it recognized that an upgrade requires specialist skills and knowledge, so CSS introduced Placid to DWS Consultants.

DWS used its Dimension Analyze™ service to analyze every E1 object, every line of every code, every specification setting and every net change right down to the pixel level.

DWS were able to identify a number of reports that did not need to be brought up to the new release as they were not being used, as Placid had moved most of its reporting to Crystal Reports.

This analysis identified that the 661 modified objects could be reduced to 369, a saving of some 44%. The analysis further enabled DWS to fully scope the upgrade effort required and to offer a fixed price and fixed timescale upgrade for the 369 JD Edwards objects involved.

Placid engaged CSS to not only manage the project but also provide functional consulting and provide CNC support with DWS carrying out the uplift of the modified objects.

There were no new functional requirements and the objectives were to perform an "as is" technical upgrade to preserve all the custom objects that are so important for the business.

The Delivery

As project manager, CSS provided the primary interface with the client and provided functional consulting and CNC services. DWS focused on its core skills to perform the uplift of the modification to the 9.1 release level.

DWS had quoted a fixed price and fixed timescale for the upgrade. It was confident it could deliver the project on time and in budget due to its Best Upgrade Approach methodology and the use of proprietary tools it has developed over the years.

The Dimension Analyze™ exercise had provided the DWS developers with an accurate assessment of the work to be done. Using its Dimension tools DWS was also able to identify all dependencies or impacts that Oracle's changes to E1 would have on Placid's custom objects.

DWS started work on the upgrade coding on October 7th 2013. The target was to complete the upgrade by November 1st. DWS made use of its proprietary Dimension Professional™ tools throughout the project to plan, manage and deliver the entire uplift project.

During the project it became apparent that the client had a requirement that would necessitate additional expenditure on some new third party software licenses.

However the DWS developers were able to offer a more cost-effective alternative which involved developing a small amount of bespoke code to provide the same functionality that Placid required for a fraction of the cost of the third party application.

With just one week of skilled developer effort, DWS was able to save the client significant financial outlay on unnecessary licenses.

The Result

The in-depth knowledge that the DWS developers have of EnterpriseOne and effective use of the DWS proprietary project tools enabled DWS to deliver

the upgrade project one week early and with zero defects in the DWS code.

Whilst the new functionality provided by E1 9.1 was not directly relevant to Placid, it has found other welcome benefits from the upgrade such as performance improvements.

These enable, for example, invoices to be produced sooner and any discrepancies to be investigated quicker to provide better customer service. Employees are also more productive as they spend less time waiting for reports or updates to be completed.

Go-Live

The client completed its technology infrastructure refresh to support the upgrade project on schedule and went live in March 2014. The system has been performing smoothly since then.

Client Reference

Our client is happy to take reference calls regarding the above upgrade if required.

If you would be interested in arranging such, please contact Barry Burke on sales@ dwsconsultants.com who will be happy to provide you with the relevant details. For CSS, contact Doug Hall on doug_ hall@cssus.com.

About DWS

Since 1998, DWS has been providing software development and technical support to companies who want to customize and extend Oracle JD Edwards EnterpriseOne.

Its award winning Dimension Analyze™ service has now assisted customers in Europe, Australasia and North America with their EnterpriseOne upgrade projects.

DWS is the trading name of Developing World Systems Limited, which is registered in England and Wales.

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