

Behind the Scenes of Batesville's Successful JD Edwards Upgrade

JD Edwards
INFOCUS

JD EDWARDS INFOCUS 2025

September 9 - 11, 2025

Agenda



Intro

Background

Our Upgrade Journey

Project Success & Lessons Learned

What's Next for Batesville

Hi I'm Vince Cochran!

IT Manager, Enterprise Applications at Batesville



- Been with Batesville for almost 18 years
- Began my career as a user working in Finance in various roles
- Moved to IT 11 years ago, as a JDE Analyst & Developer supporting HR/Finance/Marketing
- Currently IT Manager of Enterprise Applications supporting the JDE platform and associated systems after having spent 5 years in Service Delivery Management supporting Sales and Marketing, Supply Chain
- JDE Modules Utilized/Supported:
 - Financial Management (AR, AP, GL, Fixed Assets), Sales Order Management, Inventory Management, Advanced Pricing, Configurator, Procurement, EAM/CAM, Contract Billing, DRP, Work Order Management/Manufacturing



Batesville Services, LLC



Batesville Transforming to Support the Next Generation of Funeral Service

Mission

Helping families honor the lives of those they love®

Batesville is committed to providing high-quality products that create a meaningful tribute and celebrate the life of a loved one.

Vision

To be the # 1 choice of funeral professionals

Batesville strives to be the "Supplier of Choice" for service providers in North America.

Values



*Individual
Worth &
Integrity*



*Excellence
in Execution*



*Spirit of
Continuous
Learning &
Improvement*



Courage



*Customer
Focus &
Partnership*

Hi 🖐️ I'm Mo Shujaat!

VP of Advisory Services at ERP Suites



- VP of Advisory Services @ ERP Suites
- Over 12 years of JDE experience, across a diverse set of companies and industries.
- Distribution consultant by trade, orchestration builder by heart
- Experienced leading multiple JD Edwards implementations, upgrades, and process improvement projects for clients
- Enjoys building implementation/optimization roadmaps with clients and designing integrations

100+ Functional & Technical problem solvers

20+ yrs

Each consultant brings over 20 years of ERP experience



Advisory Practice

Integrating your ERP with emerging technologies to impact business goals.



Cloud services

Meeting demands for data accessibility with a seamless interface.



Managed services

Extending your internal capabilities with first-rate response times.



Consulting services

Applying expertise and best practices to maximize results.



ERP Suites Services



Business Advisory Services

- Project Management
- Technical Strategic Roadmapping
- Enterprise Architecture Strategy
- Systems Gap Analysis
- Process Engineering
- Organizational Change Management
- Digital Transformation
- Analytics & Insights Strategy



Functional Consulting Services

- JDE Distribution & Warehousing
- JDE Manufacturing
- JDE Financials
- JDE Human Capital Management
- Managed Services
- UXOne Expertise
- User Defined Objects
- Orchestration Design & Build



Technical & Infrastructure Services

- Technical Refresh
- Technical Upgrades
- Cloud Migrations
- IBM iSeries Administration
- Cloud Administration
- Networking & Server Infrastructure
- Identity Management
- Cybersecurity

Trusted Advisors For JDE Users

unlocking
efficiency



boosting
profitability



ORACLE

Partner



realize IT

The Right Partner for Managing Your JD Edwards System

ORACLE

Sell
Partner

Expertise in
Oracle Cloud Platform
in North America

aws partner
network

Select
Consulting
Partner

25+

Re-platforms

125+

Cloud Migrations

175+

Upgrades

When we say we never fail, we mean it. We minimize disruptions and have **never** had to fall back on a project.

erp
suites

realize IT

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Batesville's Pre-Upgrade Environment

Infrastructure

- Hosted in the Ivy Tech Community College data center
 - Right next to the Batesville Main Campus
- Outdated database & enterprise platform (AIX)
- Outdated Weblogic 12c, Windows 2016 servers, Visual Studio 2017, and Oracle Database 12c

Systems

- On JDE Base Upgrade 9 & Tools 9.2.4
- Highly customized environment with few base code modifications
- Unable to create modern integrations and heavily reliant on groovy

User Experience

- Outdated release was creating limitations on business solutions
- Not able to leverage new automation features
 - form extensions, logic extensions, etc

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1

Needed a new datacenter/hosting solution

2

Needed to upgrade JDE & Underlying systems

3

Required a full scale IT transformation & modernization

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Scoping the Project

To fully scope the project there were some major decisions which needed to be made and they all had numerous implications and trade-offs:

Cloud Strategy

- **Decision around:**
 - Cloud or On Premise
 - AWS vs OCI
- **Implications**
 - CPU licensing
 - Latency & Performance

Resources Challenges

- **Decisions around:**
 - Testing strategy: White glove vs User Led
 - SME & 3rd Party Coordination
- **Implications:**
 - IT Resource Availability

Finalized Project Scope

Hosting & Tech Modernization

Data Center Migration

- Migrate 70+ Servers from Ivy Tech to DartPoints Colo

RePlatform

- Migrate from AIX to LINUX for DB & Enterprise

Windows Servers

- Upgrade Windows Servers 2016 to Server 2022

WebLogic

- Upgrade WebLogic from 12c to 14c

Visual Studio

- Upgrade Visual Studio from 2017 to 2022

Oracle Database

- Upgrade Oracle DB from 12c to 19c for JDE, DSI & Transform

JDE Upgrade

JDE Upgrade

- Upgrade to Release 25
- Upgrade to Tools 9.2.9.2

Single Sign On (SSO)

- Implement JSON Web Token Single Sign on

64 Bit

- Upgrade from 32 to 64 Bit architecture

Load Balancer

- Migrate from F5 to Kemp Load Balancer

Timeline: 7 Months



**7 Months to Finish
Entire Migration & JDE
Upgrade**



**No Disruption to the
business**



**Cannot impact
customers & families**

Bumps In The Road

Challenges

How We Dealt With It

1 Full blown code freeze was not possible – Needed to deal with some in flight projects & key improvements

- Code Slushy: Froze +95% of the code
 - Dealt with exceptions on as needed basis, kept documentation, communicated early

2 Project Management Turnover – Had both internal and partner PMs turnover during the project

- Brought on additional resources early to transition key project activities
- Partner project management took over more project activities to assist with testing

3 Technical Debt & Bugs – Hard coding, usage of RTF attachments, orchestration design, and complex advanced pricing setup caused unforeseen bugs

- Quickly addressed bugs/issues with process, technical, or procedural solution
- Focused on high priority & impact issues first – critical path

4 3rd Party Issues – Encountered issues with DSI, SnapPay, and the Kemp load balancer change

- For DSI & SnapPay – Engaged their resources quickly to get resolutions
 - Load Balancer – Worked with partner to resolve issues & conducted load test

User Testing

- 1 We were able to use test scripts from previous upgrade – after some light updates
- 2 Reviewed, organized, and copied 300+ test scripts which then were used for User Acceptance Testing
- 3 Informed the users early & often about the testing approach, key dates, testing milestones. Sent regular reports on testing progress to users & ELT
- 4 Communication: Daily UAT status update calls & office hours
 - **Executed all scripts by users asynchronously & remotely with no fails!**
- 5 Completed testing successfully on time, reported all issues to a UAT issues log on Sharepoint

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UAT Phase – Calendar Schedule (Illustrative)

Week / Dates	Activities	Mon	Tue	Wed	Thu	Fri
Week 1 Mar 24 – Mar 28	Unit testing of 3rd party apps Con	IT Unit/Integrated Testing	IT Unit/Integrated Testing	IT Unit/Integrated Testing	IT Unit/Integrated Testing	IT Unit/Integrated Testing
Week 2 Mar 31 – Apr 04	Unit testing of 3rd party apps	IT Unit/Integrated Testing	IT Unit/Integrated Testing	IT Unit/Integrated Testing	IT Unit/Integrated Testing	IT Unit/Integrated Testing
Week 3 Apr 07 – Apr 11	Execution of test scripts	• Order Entry • Procurement	• Order Entry • Procurement	• Order Entry • Procurement	• Pick/Pack/Ship • Shop Floor • Finance & GL	• Pick/Pack/Ship • Shop Floor • Finance & GL

UAT Phase – Dashboard for Testing Updates

Total # of Scripts	Not Started	In Progress	Passed	Passed w/ Exceptions	Failed	Final Sign off	Do not Use	Overall Progress %
305			263	0	0	13	42	100%

Legend

Yellow	In Progress
Orange	Passed w/ Issues
Red	Failed, Needs re-testing
Green	Passed
Light Green	Signed off
Blue	Do not use the test script for test
Grey	Overall information (total # of scripts)

UAT Phase – Dashboard for Testing Updates

Testing Area	Testing Sub-area	Test Lead	Scripts Total #	Not Started	In Progress	Passed	Passed w/ Issues	Failed	Final Sign off
Finance	A/R		2			2			Signed off
Finance	A/P		12			12			Signed off
Finance	G/L & Statements		71			71			Signed off
Address Book	/		1			1			Signed off
Batonville Connect (Integrations)	/		1			1			Signed off
Sales Administrations	Testing Fusion Integration with Oracle		3			3			Signed off
Sales Administration	Quote, Price Hts, Territory Transfers, Advanced Pricing, Rebates		3			3			Signed off

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Cutover Planning & Execution

- 1 Practiced Mock Cutover & Go Lives multiple times to ensure we had all the steps & timings down
- 2 Had over 170+ tasks in our final cutover plan many of which had to be executed in sequence & based on dependencies
- 3 Involved over 54 people across all functions of the business and 5 facilities across North America
- 4 **Executed full cutover in under 60 hours, with no major business disruptions and 1 hour earlier than planned**
- 5 **Stellar work by the entire Batesville IT Team, ERP suites, and Batesville Business teams**

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Cutover Plan Overview

05/05 – 05/09	05/09 – 05/11	05/11 – 05/26
Pre-cutover	Cutover	Post Go Live
Prep	Execute	Support
Key Activities: 5/2 Send 1st Upgrade Notice(s) to Business 5/2 Identify Staff for Cutover Weekend Help Desk 5/5 Go / No go Decision 5/9 Full Build for PD 9.2.9 5/9 Final Cutover Notification 5/9 Green Light to Begin Cutover	Key Activities: - Friday Evening 8:00 PM Provide Green Light to Begin Cutover 8:00 PM 10:45 PM Run final integrity & validation reports 11:00 PM Conduct Server Migration 12:00 AM Shutdown E1 9.2 & Begin Migration - Saturday	Key Activities: 5/11 Hypercare support begins 5/26 End Hypercare support

Go Live Checklist

- ✓ 3+ Mock Go Live & Cutovers Executed
- ✓ UAT Successfully Completed
- ✓ UAT Business Sign Off
- ✓ All P1 & P2 Issues Resolved
- ✓ Cutover Plan Final Review
- ✓ Go Live Surface Test & Validation Plan
- ✓ Go Live Communications Plan
- ✓ Go Live Help Desk Support

Communication Plan

Date	Time	Owner	Communication Plan Description
5/2/25	5:00 PM EST		Send Upgrade Notice(s) to Business
5/2/25	5:00 PM EST		
5/9/25	8:00 PM EST		
5/10/25	12:00 AM EST		Send Executive & Leadership notification of Cutover Activities
5/10/25	10:00 PM EST		Checkpoint #1 - Upgrade complete
5/10/25	11:30 PM EST		Checkpoint #2 - Key Users Surface Testing complete
5/11/25	12:00 AM EST		Checkpoint #3 - Go/No Go - IT Team & Migration Partners
5/11/25	6:00 AM EST		Checkpoint #4 - Go Live Company Wide Comm
5/11/25	7:00 AM EST		Checkpoint #5 - System Released to all Users

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Go Live!

- 1 Officially Live on 05/11
- 2 Business as usual @ 8 AM Monday morning
- 3 Some issues started trickling in but no P1 or P2 issues reported

"One of the smoothest upgrades we have had..."

-Batesville CTO



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Lessons Learned

User Acceptance Testing

- Ensure you have test scripts and that they are updated
- Engage your users early and often to get them prepared and set expectations
- Use creative communication methods & frequent updates to ensure progress

Cutover Prep

- Cutover prep & practice is crucial – its painful but run multiple mocks & walkthroughs
- There is a direct correlation between cutover practice and cutover smoothness
- Ensure that cutover timings are accurately recorded and refined

3rd Party Applications

- Engage your 3rd party partners early into the project
- JDE Upgrade or platform upgrade will have impact on 3rd party applications
- Be prepared to test them to the depths

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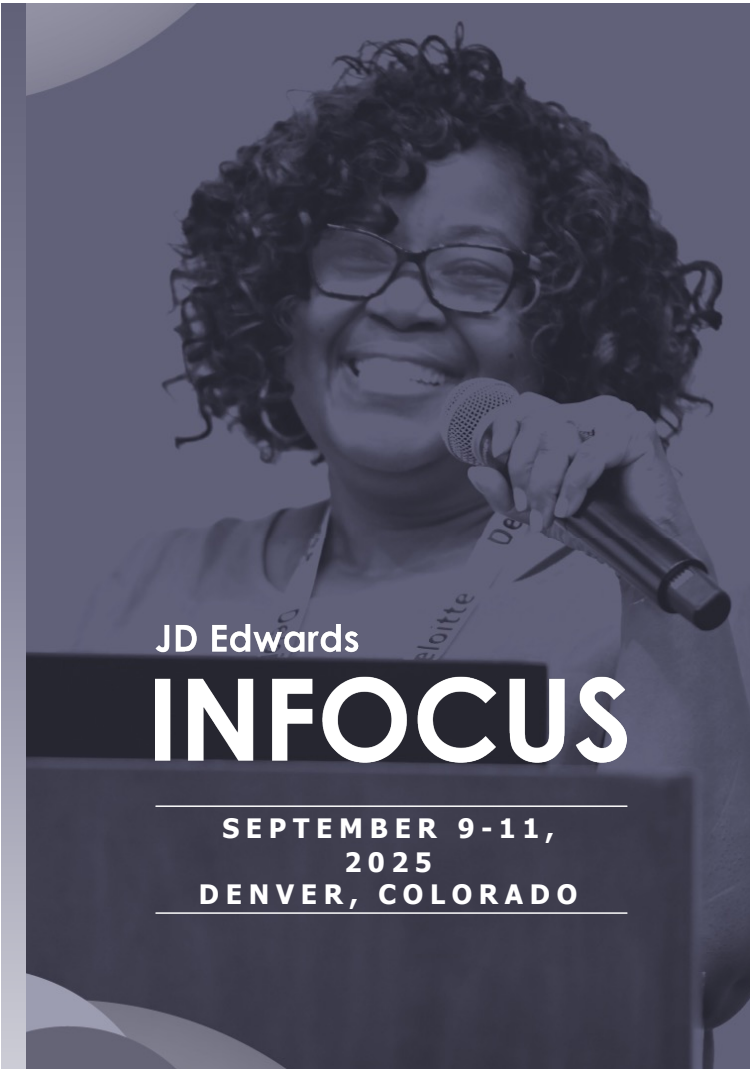
Project Success & Lessons Learned

What's Next for Batesville

What's Next for Batesville?

- 1 Utilize latest features and functionality of Orchestrator to improve efficiency of existing orchestrations and leverage toolsets for new initiatives requiring integration of 3rd party systems
- 2 Evaluate custom objects which are copies of base objects and determine best process to incorporate latest updates and features found in the base objects (i.e. pick lists, purchase order print, invoicing)
- 3 Evaluate business processes which could be potentially streamlined/automated utilizing the power of the latest Orchestrator features and tools





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Contact me:

Vince Cochran: vince.cochran@batesville.com

Mo Shujaat: mshujaat@erpsuites.com

Session ID:

P-051294



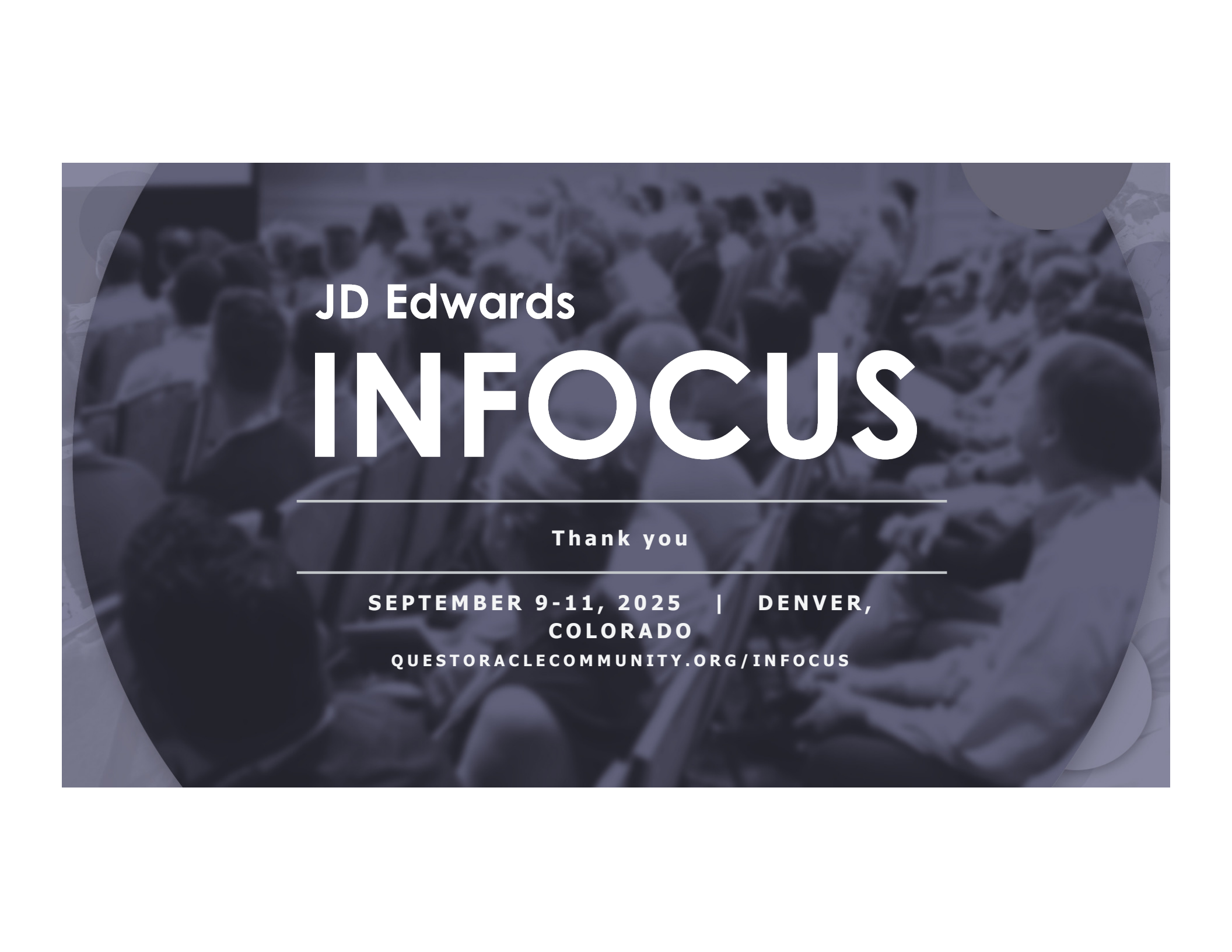
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LOVE THIS SESSION?

COMPLETE AT LEAST
3 SESSION SURVEYS PER
DAY AND GET ENTERED
INTO THE DAILY DRAWINGS
TO WIN A **\$500** GIFT CARD!





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Thank you

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