

# **Surtel Technologies**

- Case Study -

## Caribbean Implementation Utilizing JD Edward Software



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## Solution Summary

Our client launched an aggressive 3 months initiative to integrate JD Edwards's platform to the operations for their Caribbean countries Puerto Rico, Dominican Republic and Jamaica. The project had to be in compliance with Sarbanes-Oxley (SOX) requirements and the clients Growth & Profitability Report Model (GPR). The processes to be covered included Finance, Quote to Cash and Buy to Pay as well as the corresponding localizations, data conversion, interfaces, operational reports, Business Intelligences (BI) reports and Jet Forms.

## Solution Profile

Our client had the following Business Requirements:

- JD Edwards had been implemented in all our clients Latin America countries except for Jamaica, Puerto Rico and Dominican Republic.
- There will be structural changes made to the Business Process Model in the Caribbean. These include:
  - Closure of manufacturing plant in Jamaica
  - The management of stock will occur in JD Edwards from the client corporate Latin facility in Argentina, for Jamaica and Puerto Rico.
  - The client US corporate office will manage stock in JD Edwards for the Dominican Republic Third Party manage warehouse. Third Party pick-up and ship product to customers. There will be interface from JD Edwards to Third Party Distributor in the Dominican Republic
- Align clients Caribbean countries with clients Latin America Business Process Model
- Sunset the existing legacy systems.

The Plan and Strategy that we executed was:

- Roll out the existing clients Latin America business model for the Caribbean countries
- Build the IT Infrastructure in advance
- Execute the 'As Is' process before the project starts
- Select and assign super users with experience in JD Edwards business processes from Latin America and United States
- Pre configured the JD Edwards model for the three countries
- Pre analyze and localizations installation
- Pre data conversion mapping

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Key factors for the successful JD Edwards implementation of the Caribbean countries:

- Configured the IT infrastructure in time for the three countries
- Properly handle the stress generated for multi assignments and multi tasking
- Communication plan performed at the three levels of the project structure (Steer Committee, IT global - Project Management, Team Members – End Users) on weekly basis
- Take immediate actions to resolve any reported technical or business issues
- Perform IT Global Readiness assessment for each project phase, getting the approval to continue with next phase of the project.
- Involve and pull the IT Global organization together to configure the development environment and promote versions/menus/security from prototype environment to the production environments
- Integrate the localizations enhancements for Puerto Rico and Dominican Republic

As a result of Surtel commitment to the project, the client received the following benefits:

- The Caribbean project converted the clients' three legal entities Jamaica, Puerto Rico and Dominican Republic to the Americas operating system utilizing JD Edwards software.
- The client now has full visibility to the Caribbean countries, which will allow them improved Internal Controls and expedite financial reporting in full alignment with the client's global policies and expectations.
- The client will be able to share best practices in there full region and adopt potential operating improvements in their Caribbean operations as well as integration into their GPR model.
- This has enabled the clients' growth in the Caribbean region, which has improved profitability and positions the client to better compete with their competitors.

## **Distinguishing Feature**

Surtel strives to provide the client with a strong return on investment when implementing solutions. Surtel delivers on time and within budget. Our proven methodologies and business solutions enable our clients to be successful. We are experts at training, mentoring, and knowledge transfer. Our goal is to implement quickly, provide knowledge transfer and turn over support to our client's staff.

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