

O2 Works

Putting Oracle to Work

Oracle E-Business Specialists

Oracle Applications Release 11i

**Upgrade?
Or
Re-Implement?**

Release 11i Workshops
OAUG Connection Point 2003
September, San Diego



NOTE: (April, 2009)

This presentation was delivered as part of the OAUG Release 11i Workshops for the OAUG Connection Point 2003 in San Diego, CA in September, 2003.

At the time there were concerns over the viability of the upgrade process as it related to some of the older technological aspects of the Oracle applications which, at that point, were significantly different. Since that time, there have significant improvements made to the upgrade process related to the 11i versions of the applications. These improvements to the upgrade process have decreased the number of organizations who choose to re-implement generally to those who have had significant changes to their business operations and structure.

While some of the specific references re: technology are dated, many of the basic concepts for the Upgrade vs. Re-implementation decision remain. Pls. contact us if you have any questions.

Audience Profile

- R11*i* status
 - Those that have
 - Those that are upgrading
 - Those that are trying
 - Those that are considering
- What do you intend now?
 - Upgrade
 - Re-implement
- Where are you now?
 - 10.7 NCA, SmartClient, character
 - 11.0.x
 - 11*i*.x

Why go to Release 11i?

- Desupport (error correction) of 10.7, all modules, as of 30 June 2003
- Desupport (error correction) of 11.0.3 ... coming soon
- New technology and tools
- New functionality in current modules
- New modules
- New features (multi-language, multi-currency, etc.)

... a whole other discussion!

Definitions

- Upgrade – use Oracle’s upgrade toolkit to ‘convert’ data from current release (10.7 or 11.0.x) to Release 11i – *in the same single instance*
 - Pre-upgrade steps
 - Auto-upgrade
 - Post-upgrade steps
- Re-Implement – treat current release as a ‘legacy’ application, sometimes referred to as a ‘migration’
 - Install 11i software
 - Configure Application modules
 - Convert “static” data
 - Convert transaction data

Re-Implementation Options

- Minimalist Approach
 - Convert little or no transaction data
- Comprehensive
 - Convert all available historical data

Clear Cut Considerations

There are two situations where the decision whether to upgrade or re-implement is clearly indicated.

	Upgrade	Re-implement
• Are you multi-install (e.g., AP1, AP2, etc.), the precursor to Multi-Org?	No	Yes
• Do you have multiple production instances you need to consolidate?	No	Yes*

** May be able to upgrade one as 'primary' and convert / re-implement others*

Variable Considerations

Other factors will vary in importance depending your particular business issues and the significance of the factor for your situation.

These factors have a less clear cut answer; more subjective than objective, although you can apply weighted measures to help you choose the right approach for your environment.

Considerations – ‘S’ elements

- Setups and Strategy
- Standards and Supported Software
- Specific Applications
- Smarter Staff
- Systems State

Setups and Strategy

Overall Application Fit

- Does your Application configuration still fit your business? (considering growth, expansion, acquisition, divestiture)
- If not, are the necessary changes easily modifiable (i.e., *not* COA, Calendar, Costing Method, etc.)?
- Has your business structure changed significantly since your implementation (e.g., more/less business units/orgs, languages, currencies)?

Sliding Scale

Upgrade

Re-implement

Mostly

Not particularly

Mostly

Not particularly

Not at all

Extensively

Standards and Supported Software

Sliding Scale

Upgrade

Re-implement

Extensions

- How much have you customized and extended your Applications?
- How many of your extensions can be replaced by new features or functionality in 11i?
- Have your extensions potentially compromised the integrity of your data (vs what Oracle would expect)?

Minimally

Significantly

Few

Most

Unlikely

Most likely

3rd Party COTS applications

- How significantly have you integrated other COTS applications that could be replaced with new Oracle Applications modules, features or functionality?

Minimally

Significantly

Specific Applications

Application Module Specifics

- Are you currently utilizing Application Modules that have significantly changed in 11i (e.g., Order Management, CRM, PA, AR Customer functionality)?
- Do you have Application modules that you configured, but are no longer utilized?

Sliding Scale

Upgrade

Re-implement

Minimally

Extensively

None

Substantial

Specific Applications (continued)

Sliding Scale

Upgrade

Re-implement

Application Module Specifics

- Do you have complicated configuration of significantly changed functionality (e.g., workflow, order cycles)?
- Do you have extensive or complicated configuration of obsolete features or functionality (e.g., FlexBuilder, Alerts etc.)?

Minimally

Extensively

Minimally

Extensively

Smarter Staff

Business Organization Climate

- Knowing what you now know about the Applications, what would you do differently (configuration, extensions, processes, etc.)?
- Will revisiting “requirements” create significant internal or political issues within organization?

Sliding Scale

Upgrade

Re-implement

Very little

A Lot

Very likely

Unlikely

System State

Sliding Scale

Upgrade

Re-implement

Application Data Quality

- How good/clean is your data (good, bad, ugly/stupid)?
- How much of your data is still important?
- Were you a beta implementation that may have left data issues?

Very

Hardly

All

Only the latest

Not at All

Multiple modules

Application Data Quantity

- Do you have a significant volume of data?
- How critical is “down time” to your operation?

Not particularly

Very

Not particularly*

Very*

* Other factors may significantly influence

System State (continued)

Sliding Scale

Upgrade

Re-implement

Application Environment Complexity

- Is your current environment highly complex due to extensions, additional integrated custom or COTS applications that will result in an unacceptably lengthy down time for an upgrade?

Not particularly

Very

Application Hardware Environment

- Do you need to move to a different hardware platform or OS?

Slightly diff.

Significantly diff.

Factors NOT in Decision

There are a number of factors, very important to the project end result, that are not necessarily a factor in deciding whether to upgrade or to re-implement:

- **Current user interface** (Character, SmartClient, NCA/ICA) – e.g., retraining on Navigation required regardless of whether you upgrade or re-implement
- **New Hardware is required** – ideally you get new hardware on which to perform your test upgrades prior to putting it in production; even most OS upgrades can be reasonably accommodated in an upgrade ... with a few exceptions ... changing platforms (e.g., NT to UNIX) or HP-UX 10.20 to HP-UX 11.00
- **User Testing Resources** – don't make the mistake of assuming that an upgrade requires less testing than a re-implementation

Decision “Myths”

There are other “myths” circulating about situations where you reportedly can’t upgrade, some of which are related to specific 11*i* releases (11.5.1 ... 11.5.8):

- Release 10.7 PA can’t be upgraded to Release 11*i* – not true
- Release 10.7 FA can’t be upgraded to Release 11*i* – not true
- Release 10.7 CRM can’t be upgraded to Release 11*i* – yes, had to wait until 11.5.4 ... but can’t upgrade directly to 11.5.5 or 11.5.7 ... now can upgrade to 11.5.8 with everything bundled (see [Instructions for the new CRM Upgrade](#) for Release 11.5.8 on Oracle MetaLink (Note 232395.1))

All or Nothing? – Can you upgrade certain modules in an instance and not others? No ... but there is bifurcation

How Do You Decide?

Minimalist Approach – Key personnel quickly evaluate where you fall on the sliding scale for all critical factors; could be as simple as a ½ to 2 day facilitated session to determine the best approach for your organization.

Formalized or In-Depth Approach – invest in a more detailed analysis to collect more objective metrics for evaluating whether to re-implement or upgrade.

It's not exclusively a technical or functional decision ... it's an organizational one.

Tools ... Complicate or Ease?

There are tools that can further complicate your approach planning process

... *or* can resolve an issue where a factor falls significantly toward one approach or the other:

- Applimation (formerly Tickmark & Crystallize) – setup reporting, COA structure and other Application configuration changes, Archiver & Downsizer)
- Ringmaster
- Kintana
- Decision Point Applications
- OuterBay Technologies

... and more

Services – Outsourcing your Efforts

- Pay a company to perform part of the upgrade
- Outsource the data conversion – Offshore?
- Some things are best kept in house – Test case design and Execution, re-training, etc

Questions?

Approach
Q & A
and
Discussion

If you have additional questions or comments, please contact:

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