Managing a Successful R12 eBusiness Suite Upgrade
A Repeatable Methodology to Help Ensure Success

Art Dowd
Consulting Director
O2Works LLC

O2Works
Putting Oracle To Work

Overview

- Introductions and Audience survey
- Why upgrade?
- Challenges to overcome
- Upgrade types
- R12 Experience / Why it is different
- Upgrade process and planning
- Keys to Success – Process Components
- Resources
- Methodology
- Other Information sources

Introduction - Speaker

- Art Dowd, Consulting Director, O2Works
  - Former VP of IT for Hospitality Company
  - Extensive business background
  - Implemented / Upgraded Oracle eBus Suite
  - 10 years with Oracle Applications
  - Experience with Oracle Consulting and two well regarded Oracle Applications consulting firms

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Audience survey

Role
• Technical – DBA
• Technical – Developer
• Project Manager
• Business Process Owner
• Super user
• End user

Apps Release level
• 10.7
• 11.0.3
• 11.5.1 ➡ 11.5.7
• 11.5.8 or 11.5.9
• 11.5.10

Why Upgrade?

- Per Oracle, when there is compelling business reason to do so
  - New features and functionality to assist business
  - Change in business direction; keep IT aligned
  - Replace customizations and bolt-ons with standard features
- Take advantage of Tech. stack improvements
- Obtain better support when patched current
- Be "Fusion ready"
- Stay "in" support

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Application support

Release	GA Date	Premier Support Ends	Extended Support Ends	Sustaining Support Ends
11.0.3	May 1999	Feb 2007	Not Offered	Jan 2009
11.5.1 – 11.5.6		Jul 2006	Not Offered	Indefinite
11.5.7	May 2002	May 2007	Not Offered	Indefinite
11.5.8	Nov 2002	Nov 2007	Not Offered	Indefinite
11.5.9	Jun 2003	Jun 2008	Not Offered	Indefinite*
11.5.10	Nov, 2004	Nov, 2010	Nov, 2013**	Indefinite
R 12	Jan, 2007	Jan, 2012	Jan, 2015	Indefinite

For the first and second years of Sustaining Support for release 11i9, Oracle will provide fixes for Severity 1 production bugs. The legislative updates that will be provided are for U.S. Tax Form 1099 for the 2008 and 2009 tax year.

For the first year of Extended Support for release 11i10 (thru Nov. 2011), there will be no additional support charge. Per 5/4/09 announcement, fees are waived for that period.

Application support

Premier Support – covers five years from the general availability date
• Provides maintenance and support of your Oracle Database, Oracle Fusion Middleware, and Oracle Applications covering:

- Major product and technology releases
- Technical support
- Updates, fixes, security alerts, data fixes, and critical patch updates
- Tax, legal, and regulatory updates
- Upgrade scripts
- Certification with most new third-party products/versions
- Certification with most new Oracle products

Extended Support - an extra three years of support for specific Oracle releases for an additional fee.

Sustaining Support – With sustaining Support, you receive technical support, including access to online support tools, knowledge bases, and technical support experts. (Metalink and phone support)

Database & Fusion Middleware Support

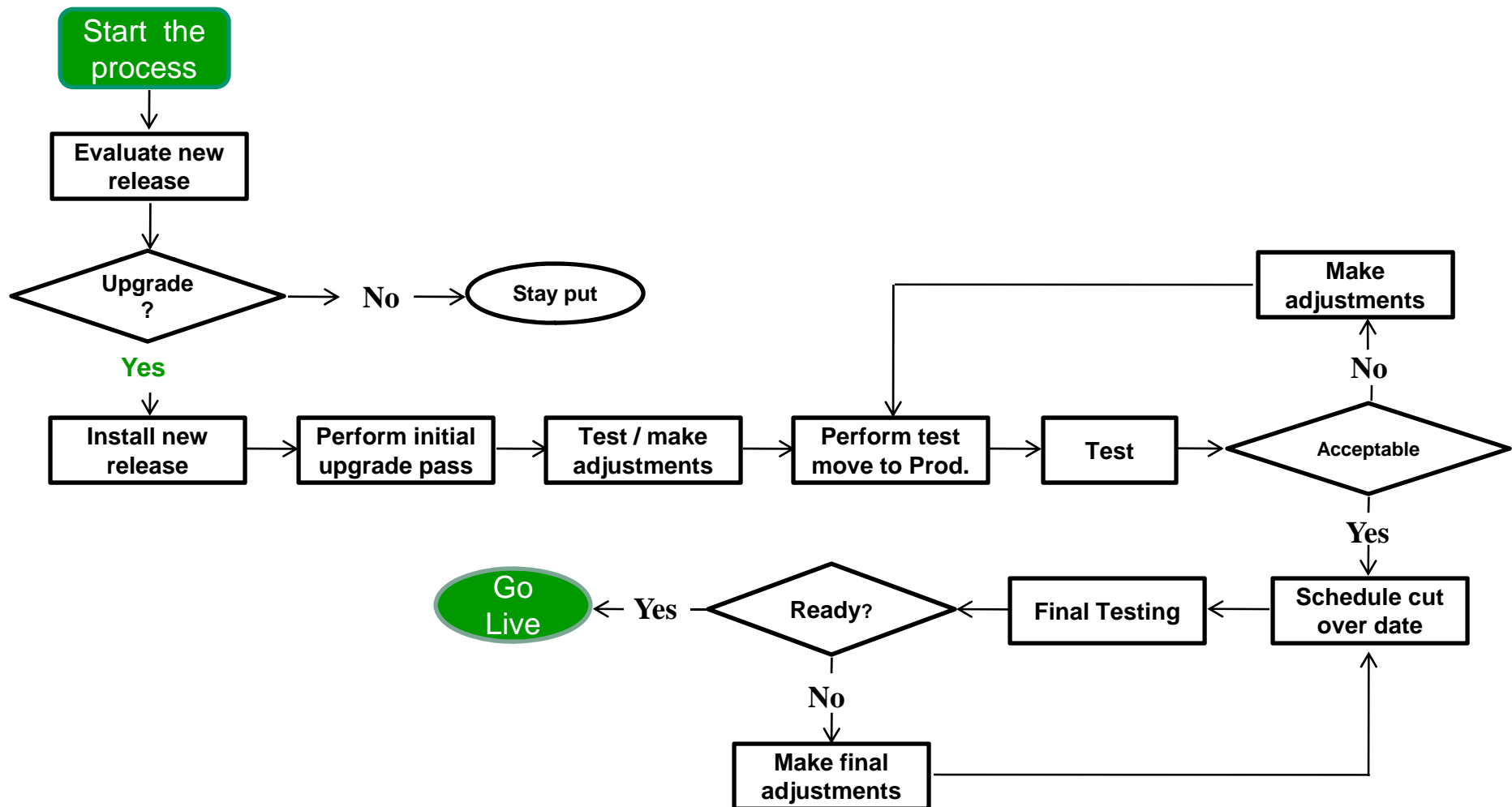| Release	GA Date	Premier Support Ends	Extended Support Ends	Sustaining Support Ends
DB 9.2	Jul, 2002	Jul, 2007	Jul, 2010	Indefinite
DB 10.1	Jan, 2004	Jan, 2009	Jan, 2012	Indefinite
DB 10.2	Jul, 2005	Jul, 2010	Jul, 2013	Indefinite
DB 11.1	Aug, 2007	Aug, 2012	Aug, 2015	Indefinite
Fusion	GA Date	Premier	Extended	Sustaining
9iAS R2 9.0.2	Apr, 2002	Jul, 2005	Not Offered	Jul, 2008
9iAS R2 9.0.3	Oct, 2002	Jul, 2005	Not Offered	Jul, 2008
10g 9.0.4	Dec, 2003	Dec, 2006	Dec, 2008	Dec, 2009
10gR2	Jan – Oct, 2005	Dec, 2009	Dec, 2011	Indefinite
10gR3	Jan – Oct, 2005	Dec, 2009	Dec, 2011	Indefinite

Challenges to Overcome- Technology

- Potential impact to existing production operations
  - Customizations, extensions, modifications, interfaces
  - 3rd party bolt-ons
  - Changes to standard functionality
- Sometimes things don't always work the first time
- Other components of the technology stack could change or require change
- Hardware / Infrastructure may be inadequate
- Downtime window could be prohibitive
- Bad data / lots of it

Challenges to Overcome - Resources

- Executive sponsorship
- Not enough staff to handle the project and day to day business as well as support
- Hardware Environments
- Training capacity
  - Resources & skills
  - Tools
  - Understanding of new features / functionality
- Testing
  - Knowledgeable testers
  - Relevant scripts
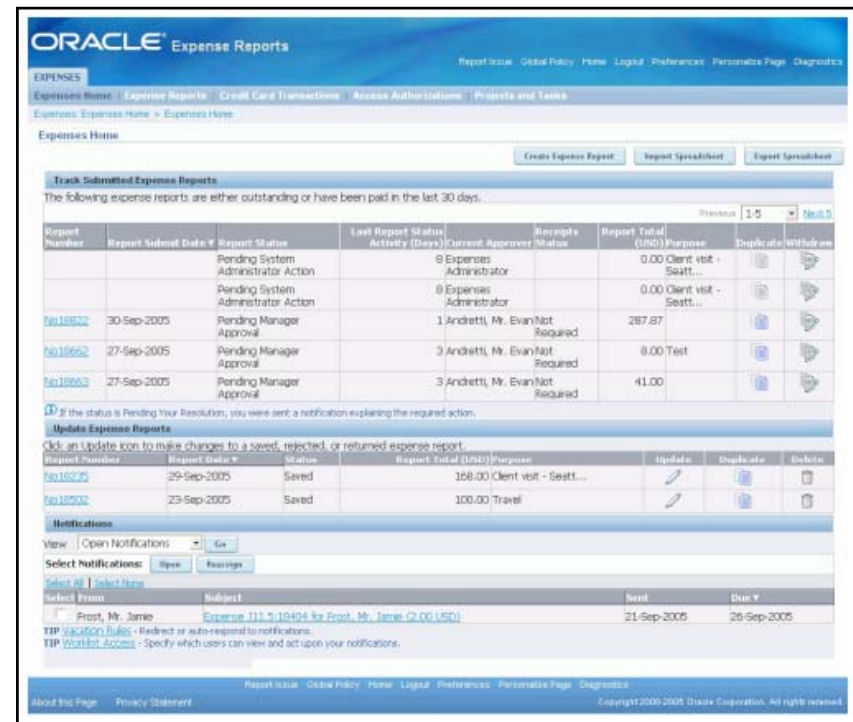
Typical Upgrade Process Flow

```
Start the
process
   │
   ▼
Evaluate new
release
   │
   ▼
 Upgrade ?  ───→ No ───→ ( Stay put )
   │
  Yes
   │
   ▼
Install new   →  Perform initial  →  Test / make   →  Perform test   →  Test  →  Acceptable
release          upgrade pass        adjustments       move to Prod.
```

Make adjustments ──── No ←── Acceptable

Perform test move to Prod. ←──── Make adjustments

Acceptable ── Yes ──→ Schedule cut over date

```
( Go Live ) ←── Yes ── Ready? ←── Final Testing ←── Schedule cut over date
                         │
                         No
                         │
                         ▼
                   Make final
                   adjustments ──→ (to Schedule cut over date)
```

Upgrade Type

- **Technical upgrade only**

  - Focus on the tech stack

  - Led by DBA / Tech team with little functional support

  - Functional impact = testing and potentially training

  - Less expensive option

  - Common with dot release upgrades

- **Full Business-led Upgrade**

  - Aligned with Business objectives

  - Inclusive, wide-ranging project across IT and Business

  - Requires more Executive Sponsorship

  - Investment in the IT / Business needs

Why R12 is not your standard upgrade

- **User Interface overhaul** will <u>change</u> to look and feel of the applications <u>for everyone</u>

- Certain **modules had significant modifications** and enhancements to features and functionality
  - General Ledger
  - Accounts Payable / Payables
  - Accounts Receivable
  - Procurement services

  … generally the modules with the most users

- **Reporting tools** have been impacted

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R12 Lessons learned

- ## Finance / GL

  - **User Interface - Very different look and feel**. Similar to PeopleSoft. Will require more training and getting used to.

  - **Sub ledger Accounting (SLA)** for Operating Unit flexibility

  - **E–Business tax setups** for each financial module have been removed and are now centralized.

  - **Multi-Org Access Control (MOAC)** - Provides role based access to Operating Units. It can be confusing and dangerous to set up due to access to multiple operating units

  - **Check out the critical reports early** - Trial balances, sub ledger accounting, etc. are different with the XML /PDF output. Many reports no longer exist. New setups are needed in Sub Ledger Accounting (Open balance definitions) and some new templates

R12 Lessons learned

- **Accounts Payable**
  - **Invoice workbench and Invoice Processing**. New look and feel for the workbench. Includes old
  - **iPayment** functionality now included and affects vendor consolidation for AP, CE, and Advanced AR
  - **iSupplier portal integration** had been rough when product was first released. Has been cleaned up, but test thoroughly.

- **Project Accounting**
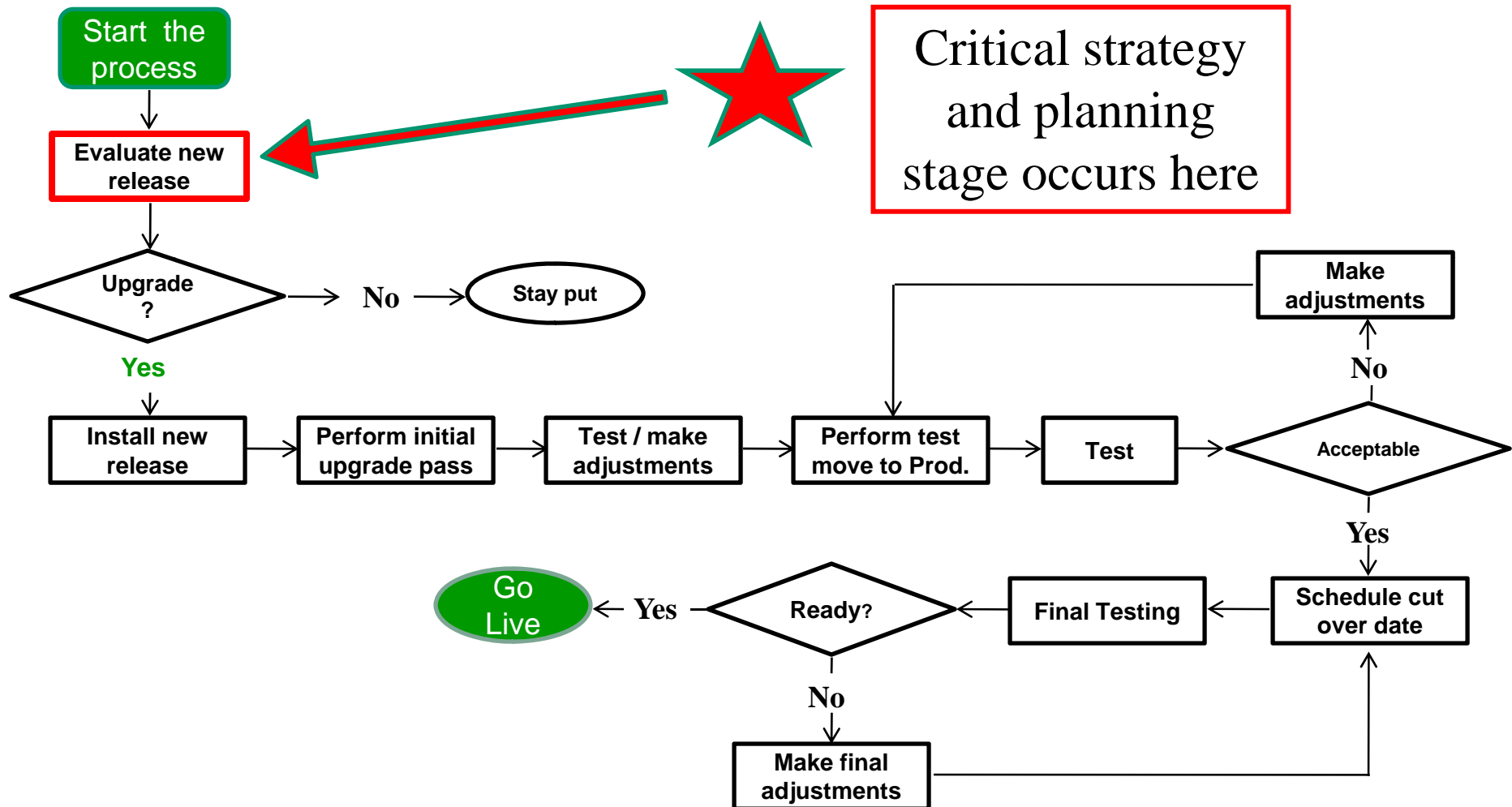 - Projects distribution processes no longer require dynamic insertion be enabled for the GL structure.

R12 Lessons learned

- **Project Accounting**
  - Sub ledger accounting (SLA) still requires configuration of Projects Auto Accounting as well as PO, supplier invoice and expense report Account Generators. You can change the account using Sub ledger but the "default account" is still built using one of these methods
  - Tax code defaults are gone from Projects implementation options. They are now handled using the tax engine.

R12 Lessons learned

- **Oracle Business Intelligence Enterprise Edition**
  - **Confirm OBIEE environment technical requirements** for Web Server, Portal, Oracle Internet Directory (OID), Operating System
  - **Oracle Fusion Intelligence is not certified on Linux.** Could not implement.
  - **Confirm OBIEE hardware requirements.** Requires single installation on a high-performance server
- **Web ADI**
  - Lost functionality/issues: Desk Top ADI > WEB ADI
  - When moving from Desktop ADI to Web ADI, you lose the ability to create financial statements in ADI

Upgrade Flow – Key step

Start the process

Evaluate new release

Critical strategy and planning stage occurs here

Upgrade ? → No → Stay put

Yes

Install new release → Perform initial upgrade pass → Test / make adjustments → Perform test move to Prod. → Test → Acceptable

Make adjustments

No

Acceptable → Yes → Schedule cut over date

Final Testing

Ready? → Yes → Go Live

No

Make final adjustments

COLLABORATE09
Technology and Applications Forum for the Oracle Community

OAUG™
oracle applications users group

Upgrade Planning

Planning process needs to be comprehensive and inclusive of Business alignment and technical aspects

- **Areas to evaluate include:**
  - Upgrade extent
  - Business alignment
  - Hardware / platform / network capacity
  - Human resource availability – who and when
  - Training capacity and tools
  - Application support
  - Testing strategy and experience
  - Oracle product strategy
  - Project planning and management capacity

Oracle Applications Upgrade Workshop

O2Works — Putting Oracle to Work

If your Organization runs the Oracle E-Business Suite, you have an upgrade in your future.

Upgrades can be intimidating, time-consuming, and challenging. Per Oracle Corporation, customers should upgrade when there is a business reason to do so. In today's IT environment, it is critical that there is a return on your upgrade investment. To do that successfully, upgrades should be approached with the same level of planning, strategy, and execution as the original implementation.

O2 Works LLC, with decades of hands-on experience, is offering a concise, packaged assessment designed to identify all of the technical and functional issues that need to be considered as part of any Oracle EBS upgrade effort.

Key Facts—O2 Works:
- 100% reference-able client base
- Strict Oracle E-Bus focus
- Consultants average more than 11 yrs. experience on Oracle products
- Wide ranging customer base of more than 130 clients
- Heavily involved in Oracle Application User Groups and Oracle Communities

ORACLE PARTNER

OAUG STAR PARTNER LEVEL THREE

Services Offered:
- ❑ Upgrades
- ❑ New Implementations (full and modules)
- ❑ Remote Support (DBA / Sys. Admin. & Functional)
- ❑ Application optimization
- ❑ Training
- ❑ Client Advocate support
- ❑ Testing services

O2 Works LLC

703 McKinney, Suite 304
Dallas, TX 75202
Phone : 972-466-2660
e-mail: info@o2works.com
www.o2works.com

Dallas . Chicago . Denver

Areas to be explored include:
- ◆ Upgrade extent:
  - Technical and functional upgrade efforts
  - Upgrade vs. re-implementation
- ◆ Business alignment:
  - New features / functionality of potential new modules
  - Customization & extension assessment / evaluation
  - Top ten needs list
- ◆ Capacity planning:
  - Hardware and network scale-ability
  - Downtime requirements
  - Database instance strategy
  - Resource expectations
- ◆ Training and application support:
  - Review current learning tools
  - Assess existing support effectiveness
  - Evaluate on-going training needs
- ◆ Other considerations:
  - Patching status
  - De-support timeframes
  - Testing capacity, strategy
  - Oracle product strategy / direction considerations
- ◆ Project planning capacity:
  - Who needs to be on the team and when

Description of Service: Depending upon the size of your application footprint, O2 Works will deploy a team consisting of a technical lead and 1—2 functional resources to perform the assessment. It is expected that the evaluation will be completed within 1 week's time and results presentation/ report will be completed in the following week.

Deliverables: Engagement deliverables for the upgrade assessment include:
- ☑ Technical Assessment of current environment
- ☑ Strategic upgrade briefing meeting / presentation for key personnel and end-users covering:
  - Proven upgrade strategy for customizations and extensions
  - Third party tool recommendations
  - Best practice recommendations for testing and training
  - Project planning assistance for technical and functional teams
- ☑ Final report detailing pre and post-upgrade recommendations

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How to Ensure Success - Build a Repeatable Process

- **Secure** - Active Executive sponsorship and support
- **Communicate** – Transparent reporting on Progress
- **Gather** - Proper Materials
- **Recruit** - The Right Team Members
- **Organize** - Create and Update Critical documents
- **Analyze and Plan** – Use Iterative Method (3 rounds)
- **Execute** -A Serious and Dedicated Testing Process
- **Experience** - Have a leader , bring back the vets

  Tip - Archive work from previous iterations

Secure Executive Sponsorship

- Who is the 800 lb. Gorilla?
  - High visibility buy-in
  - Support – active is better
  - When you really have to have a decision…
  - Helps control scope creep
- Does the project have legs?
  - Is it aligned to the current business objectives
  - Strategic
  - Return On Investment

Communication

- Have a comprehensive plan
  - Understand the frequency
  - By what method / means
- Know your audience
  - What are they interested in
  - Share relevant knowledge
- Set the tone
  - Be transparent
  - Positive
  - Recognize the value
  - Focus on what upgrade will provide to business

Gather Proper Materials

- From Metalink:
  - Release Content Documents for all Releases between where you are and where you want to be (for module leads only).
  - Latest *Implementation* guides for each module in production or moving to production
  - Latest *User* guides each module in Production or moving to production
  - Secure Passwords and Access for whole team
  - E-Business Suite R12 Information Center
  - E-Business Suite Upgrade Guide – Metalink note 461705.1

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Proper Materials (cont.)

- List of Customizations and Extensions
  - Include all reports, forms, views, extracts, triggers, etc
  - List of custom reports (in all forms)
  - Interfaces
  - Workflow/Account Generator Definitions
  - Oracle supported extensions
  - Anything that touches Oracle that didn't come shipped from Oracle Corporation
  - Disconnected Spreadsheet (for OIE)
- Detailed design documents for all of above
- Be prepared for some "unknown" customizations

Custom code change quagmire

- **Oracle's R12 Upgrade**: Most code upgraded seamlessly, but…

- Custom Code Requiring Changes during :
  - **Forms**: ~10% of forms and libraries needed touching
  - **Reports**: ~1% of reports needed touching
  - **C code**: ~20% of C code needed touching
  - **Java code**: ~1% of overall Java code needed touching
  - **JSP's**: ~50% of JSP's needed touching
  - **AutoConfig** Configuration Customizations
  - **Development Tools**: compilers, Forms/Reports Builder 10.1.2, JDev10.1.3

Source: Ray Lin - Customer Service Support Manager*: Oracle E-Business Suite Release 12 Upgrade*

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Proper Materials – Tools

- Library of Test Cases
  - Detailed test scripts
  - Include and use cases from past 11i Implementation or upgrades
  - Be prepared to add some test cases for new features or functionality
  - Modify test cases to reflect new or changed functionality
  - Make sure your test cases have specifics about test data and expected results
  - Check them back in to the library for next time

Proper Materials - Hardware

- Hardware, Software, and Network
  - Space for Test, Dev, Training Environments
  - Cloning skills
  - Scale-able instance strategy
  - Adequate high speed storage / recovery capabilities
  - Shared Project Folder or Space
  - Mac and PC if necessary
  - Ability for Oracle Support Access if Necessary (ODC or Net meeting)
  - Adequate network bandwidth / throughput
  - Remote access via secure VPN

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Proper Materials – Hardware (cont.)

Definition of Current State of Production

- All components of the tech stack
  - Browser Version
  - Database
  - App server
  - Discoverer
  - Self Service Framework
  - Approvals Manager
  - Desktop OS
  - Version of ADI
  - Version on tools

Extended Team - Responsibilities

Management / Executive Sponsor			
Project Manager			
Technical Lead	Business Analyst Fin. Apps	Business Analyst SC & Other	Trainer
DBA / Sys. Admin	Developer / Analyst	Business Process Owners	Super Users
Help Desk / Network Support			
End Users / Testers			
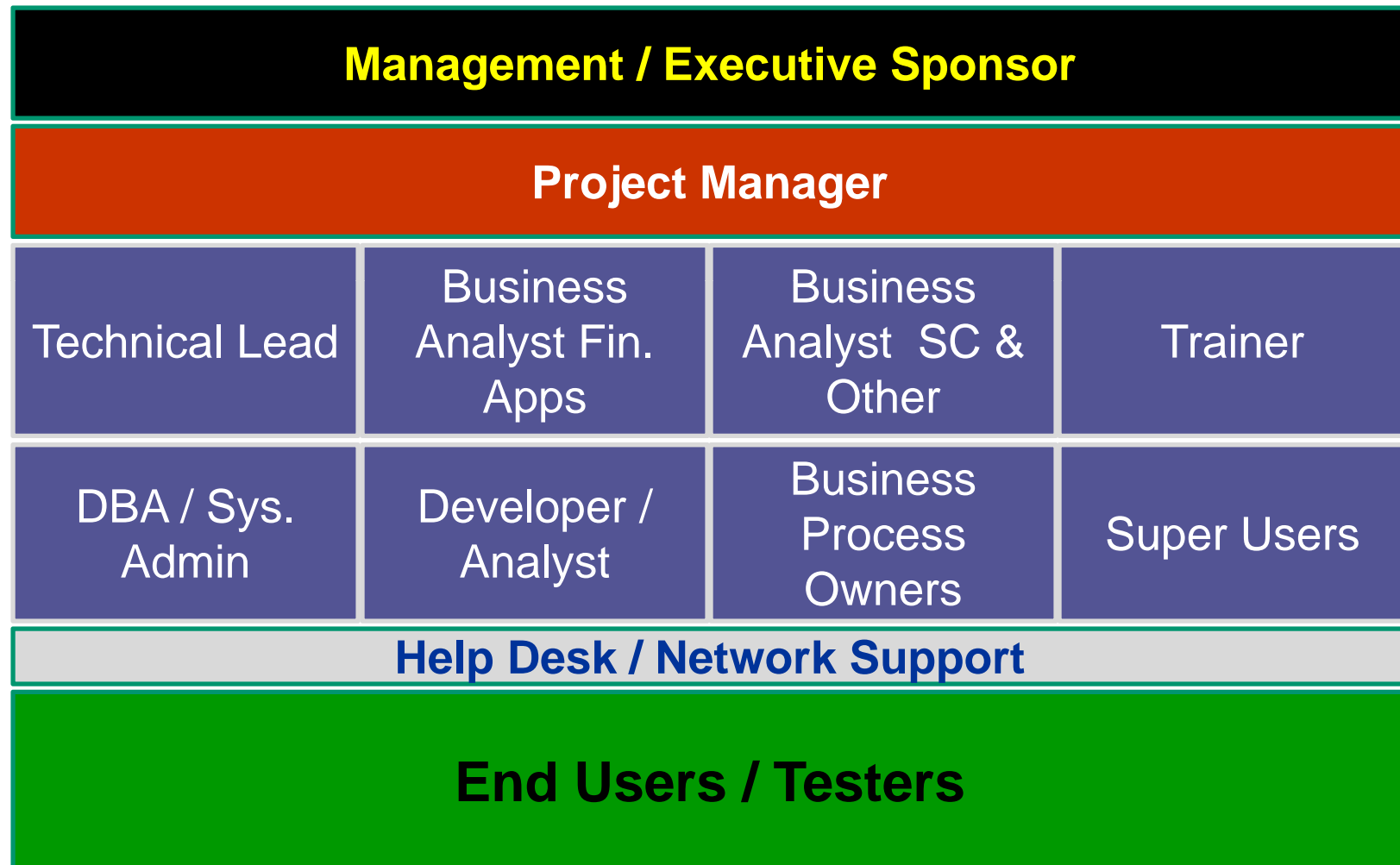
Team Members and Skills - Technical

- **DBA(s) and duties**
  - To review Patching instructions, current state and pre-requisites
  - Develop upgrade instance strategy / validate space
  - Create test environment
  - Perform initial timings for patch application
  - To apply Patches for the Patch
  - Creation of Testing Environments
  - Incremental Backups
  - Production Cutover

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Team Members and Skills – Tech (cont.)

- **Technical lead**
  - Develop technical plan
  - Review architecture and Instance strategy
  - Schedule development work
  - Assess technical training needs

- **Developer Analysts**
  - Review customizations, extensions, interfaces
  - Work with functional resources to reconstruct necessary CEMLI's
  - Modify / update /remove CEMLI's
  - Develop and test code

Team Members and Skills – Tech (cont.)

- **Network Specialists**
  - Trouble-shoot, and resolve any network bandwidth issues
  - Push out new versions of any necessary client software
  - Participate in load testing sessions
  - Provide remote Access for non-employee personnel

- **Help Desk Personnel**
  - Assist with Testing New Features
  - Help create a FAQ list for users
  - Update Account and Description

Team Members and Skills

- ## Project Manager / Team Leader
  - Construct Initial Project Plan and Budget
  - Obtain Necessary Materials
  - Recruit, Build and Manage Project team
  - Develop and Administer Communication Plan
  - Log, Escalate, and report on Issues and Risks
  - Develop Cutover Plan
  - Manage Adjustments to the Plan
  - Drive the Development of Master Impact List

Team Members and Skills – Functional

- **Super Users (Functional)**
  - Review RCDs for new features and changes
  - Review draft of Master Impact List
  - Input to and Execution of Test Cases and Test Scripts
  - Go to Person for knowledge of New Functionality
  - Develop and Deploy New Features Training and Documentation
  - Interact with end users for module to gain understanding of issues and needs

Team Members and Skills – Functional

- **Trainers**
  - Assist Business Process Owners and Super Users develop new training materials covering new features
  - Update training material for new users
  - Develop training for new features

- **Additional Optional Resources**
  - Oracle Support Representative
  - Internal or Outside Consultants
  - Documentation Specialists

  Tip – Approach this like a cross functional project

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Organize – Create & Update Critical Documents

Identify and Pull together key information

Get prepared for your analysis

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Two Critical Documents

Master Checklist – Build a Master list for the upgrade and list every step.

TIP: Download Maintenance Wizard to a spreadsheet. Capture timings for pre, during, and post patching. LIST and Assign EVERYTHING.

Master Impact List – Complete full listing of all potential changes that should require investigation or retesting

– Drives new features use and all testing
– Applies to standard Oracle features and Customer-created impacts

Example of Master Impact List

Master Impact Analysis - Upgrade to 11.5.10 Initial version						
Item	**Module /Impact Description**	**Classification**	**Status**	**Assigned (Who)**	**Pack?**	**Ranking (H,M,L)**	**Notes**
PO							
	Custom Pricing APIs	Optional	Open		11.5.10		Custom pricing date api; Custom requisition pricing api; Custom PO/Release pricing api;
	Purchasing Documents Open Interface Enhancements	Optional	Open		11.5.10		Add new lines and associated shipments to an existing standard PO in Approved or Incomplete status and then initiate the approval process.
	Autocreate and PO Entry Usability	Mandatory	Open		11.5.10		Increased size of autocreate window to display more requisition lines; Increased size of Enter PO window to display more order lines; Reduced pop up messages; Provided "Reassign Buyer" option in the AutoCreate window.
	Procurement Contracts - See Notes Below	Optional	Open		11.5.10		Contract Management capabilities (Oracle Procurement Contracts)
Sourcing							
	Negotiation Scoring	Optional	Open		11.5.10		Negotiation Level Attributes; Scoring Templates; Subjective Scoring; Analysis Scenarios;
	Award Summary	Optional	Open		11.5.10		Provides a complete view of the award recommendation for sourcing team members and designated award approvers.
	Award Approval	Optional	Open		11.5.10		List of approvers is automatically generated based on rules set up in Oracle Approvals Management
	Amendments	Optional	Open		11.5.10		Manage changes to a published sourcing event even after suppliers have begun responding.
	Document Printing	Optional	Open		11.5.10		Buyers and Suppliers can generate copies of the sourcing package in PDF format.
ENG							
	Increase Change Type Name Length	Mandatory	Open		11.5.10		
	Electronic Names and Electronic Signatures (ERES) Support	Optional	Open		11.5.10		Oracle Quality
	MLS Support for Change Types	Optional	Open		11.5.10		Change types can be entered in Multiple languages
WIP							
	Outside Processing Enhancements	Optional	Open		11.5.10		Improved communication between mfg and procurement functions when qty or date changes occur
	Component Picking Enhancements	Optional	Open		11.5.10		Link a Supply Subinventory to a Machine resource
	Electronic Records and Electronic Signature Support (ERES)	Optional	CLOSED		11.5.10		For FDA Regulations

Master Impact List

- Some Examples:
  - 3rd Party Check Printing System may need to be retested or replaced with XML / BI Publisher
  - Custom Form may need to have customization reapplied to standard Oracle form
  - Account Generator changes might get overwritten, and it may be necessary to reapply changes
  - New Report available as standard functionality, we may want to review as a potential business solution
  - Standard Interface may have new parameters, may need to resubmit for recurring submission (scheduling)

Analyze and Plan – Iterative Method

Analyze, Plan, Estimate, Repeat

Use as a Tool to Build your Project Plan

The Method – First Iteration

- Check for new Materials from Metalink , Alerts, etc

- Master Checklist - Read and Document each required Step – some functional some technical resources required – Some are pre-requisites, some are post patching steps

- Get Clarification on any unclear steps –Upgrade manual or Patch– internally or with Oracle Support – missed steps are costly

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The Method – First Iteration (cont.)

- DBA team creates the test environment
- Set up R12 Vision Instance for functional sandbox
- Refine Master Checklist – Timings for Pre-Requisite Steps – DBA Portion
- DBA applies patches – gather good timing estimates (challenge in test environment)
- Gather timing on additional patching, Gather Statistics, post patching, etc

The Method – First Iteration (cont.)

- Begin Assembly of Master Impact List - (could be parallel with previous steps)
  - List of Customizations and Extensions
  - List of "configurable" items like Workflow
  - Review cumulative RCD documents for functionality changes, even bug fixes
  - Bolt-on products and interfaces
  - Mandatory and Optional New Features

Provides an excellent list of potential changes or points of failure – Drives Testing Effort

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The Method – First Iteration (cont.)

- Meet with Technical and Functional team to refine

  Master Impact list
  - Add missed impacts
  - Remove unnecessary impacts
  - Prioritize – High to Low

- Develop thorough test plan to cover graduated testing

- **Critical** - Tie Test cases from Library to items left

  on Master Impact List

- Create New Test Cases and Scripts or update to

  include new features and functionality

The Method – First Iteration (cont.)

- Assign Technical Impacts to developer(s) to research as early as possible
  - Interfaces, Extensions, etc
  - Research table and other changes
  - Get estimate of rework time if necessary
  - Refer back to design documents
  - Ensure it is still used, still a requirement
  - Optimizer Changes – Performance

- Assign test cases to Testing team members for Execution
  - Have test cases for all items on Master Impact List

The Method – First Iteration (cont.)

- Issue Resolution and Verification of Functionality

- Finalize "Footprint" of new features

- Develop Re-Training Materials and Communication Plan if necessary

- **Plan & Execute Multiple Iterations: More is Better**

  - **Minimum recommendation = 3 iterations**

  - **Include a dress rehearsal for timing measurements**

- Plan Production Cutover

- Communication of Cutover Plan – Know your time to perform tasks!

The Method (cont.)

- Cutover / War Room

- Post Cutover Support (DON'T test in Production)

- Update and File Library of Test Cases and
  Scripts for future use

- Keep updated and available – all Training information (how-to's, FAQ's, tests)

- Archive:

  - Master Impact List

  - Materials for next upgrade

  - Redevelopment timings, etc

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Testing Process – Special note

- Bring back your vets – they are better and faster

- Know expected results – Use real Data

- Assign individual test cases

- Have a procedure or systems for issue logging/resolution

- Screen Shots – Proof

- Signoff – Accountability

- Testing Tools can provide additional value …

  BUT, they cannot replace user involvement

Some Suggestions based on Experience

- Get REAL timings – Everyone Fudges a bit
- Insist on Upper Management approval of user involvement for testing
- Invest in a Library of **applicable Test Cases**
- Watch Email Notifications during testing
- Plan for environmental issues due to cloning
- Don't underestimate 3rd party bolt-on impacts

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Suggestions based on Experience (cont.)

- Re-Use of Team members speeds successive iterations
  - Concept of Upgrade Tiger team
  - Plan can be re-used
- Scrub Oracle Docs on New features before giving to End users – make easy and less scary
- Communicate the complexities to management and team members each iteration
- Systems for managing testing provide value but can be expensive

For More Information

- Metalink

- Appsnet – Good Summary on New Features

- http://www.oracle.com/appsnet/technology/ upgrade/docs/features.html

- Online Help – (New Features Section)

- Reference Manuals

- Blogs: Stephen Chan: http://blogs.oracle.com/schan/

- User Groups / Conferences

Important R12 Metalink notes

- Recommended by COE:

Article	Plan note #
Oracle E-Business Suite Upgrade Guide	461709.1
Oracle Payables Release 12 Known Issues	405627.1
R12 Proactive Intelligence Center: Oracle Payables	578232.1

- Other relavent Metalink recommandations:

Oracle Applications Upgrade Guide: Release 11i to Release 12	B31566-01
Oracle Applications Documentation Resources, Release 12	394692.1
Oracle Applications Release 12 Upgrade Sizing and Best Practices	399362.1

O2 Works R12 Experience

Company	Project	Status
American Transmission Company (ATC)	R12 Implementation – complete replacement of antiquated systems that included multiple applications: ORCL Purchasing, iProcurement, Sourcing, Procurement Contracts, iSupplier Portal, Accounts Payable, General Ledger, and Accounts Receivable as well as OBIEE and Fusion Middleware for SOA.	Went live in May. Project took 10 months to complete with a compact project team of experienced resources. Oracle write-up
Tootsie Roll	Provided Financials Triage in International R12 Re-implementation. Second phase = OM, SC, and Transportation Management	Live on FIN and PO; 2nd phase is in process
Zebra Technologies	Providing functional lead for R12 Projects Acct & FIN implementation	In process

O2Works R12 Experience

Company	Project	Status
Forsythe Technology	R12 Upgrade	Through 2nd iteration.
Toni and Guy	R12 Upgrade	Live
Knape and Vogt	Assisted with electronic commerce/EDI , Order to Cash, and manufacturing.	Live
Tessco	R12 Upgrade (R 12.0.6)	In 2nd Iteration
Edstrom	Provided clean up support for an R12 implementation . Phase two = implementing AR and eBus Tax.	Production support. Starting 2nd phase.

R12 ATC Oracle Summary

- Our successful Release 12 implementation for American Transmission Company of Waukesha, WI is captured in a customer snapshot published by Oracle.

- It was one of the first R12 implementations to be completed and provided a significant list of lessons learned.
  - Accelerated implementation
  - Lean project team

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Any Questions ???
Thank you

Art Dowd

Consulting Director

214-725-2828

adowd@o2works.com

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