Release 12 Upgrades
Have you thought about…

Solution Beacon

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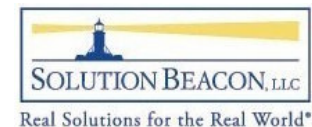Real Solutions for the Real World®

Overview

Objectives/Agenda

- Provide a high level view of topics to consider when upgrading to Release 12
  - Is a "technical" upgrade possible?
  - What do I need to research more?
  - When is the right time for training?
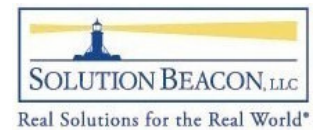 - Functional Topics
  - Technical Topics

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- ## Are you aware that…
  - ### There are over 2500 new features in Release 12?
    - How does this impact custom Responsibilities - Will all these new features be "discovered"?
    - A responsibility can now access data in multiple organizations?
      - This allows for quicker data entry for shared services organizations.
  - ### Release 12.1 was released in April 2009?
    - It's not that new any more
  - ### The user interface to the Oracle Diagnostics scripts was rewritten in OA Framework in Release 12.0.6
    - Now utilizes role-based access control requiring role grants from the user management responsibility?
   - The setup reports in diagnostics can help you find missing setups?

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Financials - GL

- Are Legal Entities defined at the prescribed level for R12?
  - Reflects legal corporate structure
  - Utilized by Accounting Functions, E-Business Tax, Intercompany, and Bank Account
  - Balancing segment is associated with legal entity – not ledger
- Is your Current Ledger structure aligned with the current and/or planned business?
  - Operating units are associated with ledgers in R12
- Are ledgers designed to satisfy non-GAAP accounting requirements?
  - Secondary Ledgers can be utilized for statutory, management, and/or consolidation reporting
  - Mapping from Primary to Secondary Ledger(s) is defined in General Ledger and is assigned in the Accounting Setup Manager
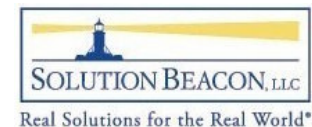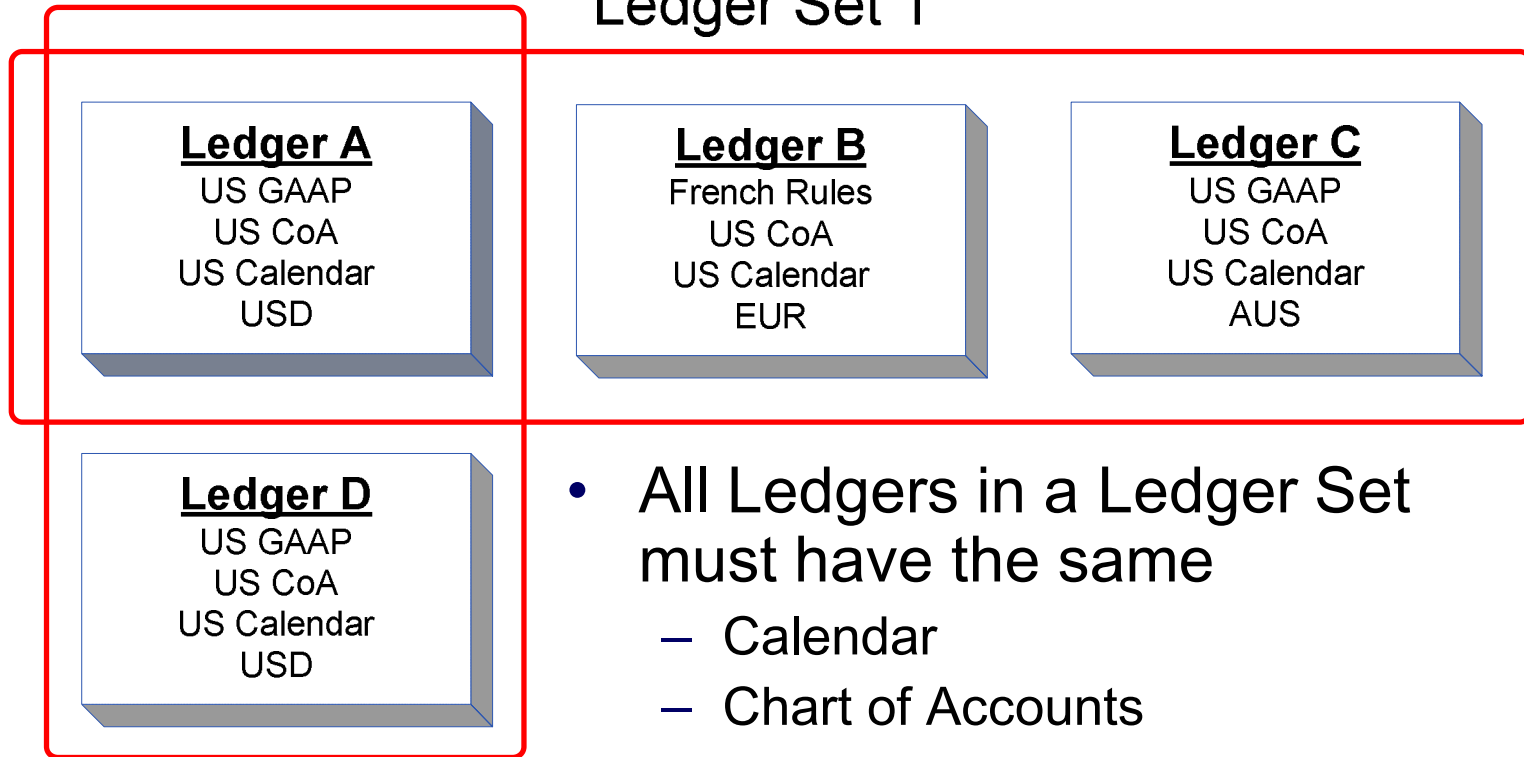
- Are ledgers designed to optimize Release 12 functionality for Foreign Currency Reporting and other enhancements?
  - Ledger Sets
    - All Ledgers in a Ledger Set must have the same Calendar and Chart of Accounts
    - Functionality across ledger sets - Open/Close Periods, Create Journals, Translate Balances, Reporting, and View Information
      - Improves Data Security, Reliability, and Consistency
  - On upgrade, each Set of Books becomes a Ledger and a Ledger Set composed of one Ledger

Ledger Set 1

Ledger A US GAAP US CoA US Calendar USD	**Ledger B** French Rules US CoA US Calendar EUR	**Ledger C** US GAAP US CoA US Calendar AUS

Ledger D
US GAAP
US CoA
US Calendar
USD

- All Ledgers in a Ledger Set must have the same
  - Calendar
  - Chart of Accounts

Ledger Set 2

8

8

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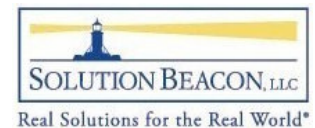
- Web ADI and Report Manager are now separate applications
  - This may require assistance in transitioning to Release 12
  - Running current requests without logging in is no longer an option
- Did you know that the MRC schema has been eliminated in Release 12?
  - Multiple reporting currency is now handled by setting a reporting currency
    - Similar to a secondary ledger except currency is the only variable

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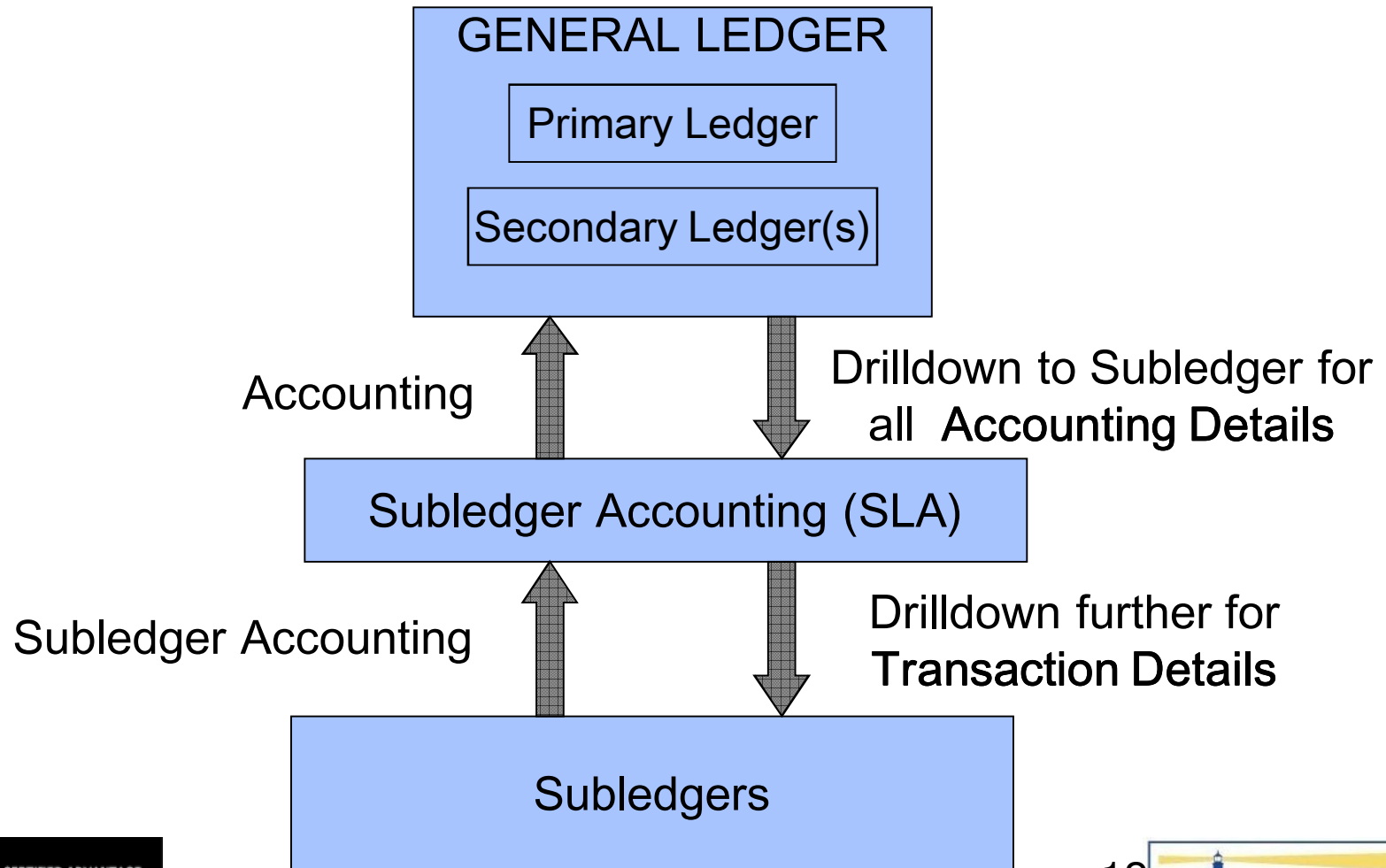
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Financials – Subledger Accounting

- Is there any planned change to seeded transaction rules for any of your subledgers?
- How are Account Generator modifications brought into the Subledger Accounting engine?
- How can Subledger Accounting be leveraged going forward?
  - Oracle Projects cost distribution, revenue generation, and accounting event generation processes require AutoAccounting to create **default** accounts during processing
  - Reduce your current extensions by using the Subledger Accounting engine for complex rules or to override defaults
- Drilldown from GL will be from GL through SLA to the individual subledger transactions
  - Subledger accounting schema is XLA
  - Post in summary to GL since detail is in XLA

Subledger Accounting

GENERAL LEDGER

Primary Ledger

Secondary Ledger(s)

Accounting

Drilldown to Subledger for all **Accounting Details**

Subledger Accounting (SLA)

Subledger Accounting

Drilldown further for **Transaction Details**

Subledgers

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- ## Are you aware that…
  - There is a robust set of reconciliation tools within Subledger Accounting and that there is a new reconciliation process for all sub-ledgers?
  - Set of Books now call Ledgers and have 4 Cs
    - Chart of Accounts
    - Calendar
    - Currency
    - Subledger Accounting Convention (New in R12)
      - Six Seeded Subledger Accounting Conventions
        - » Accrual with Encumbrance Accounting, Cash with Encumbrance Accounting, Standard Accrual, Standard Cash, US Federal Accounting, and China Standard Accrual

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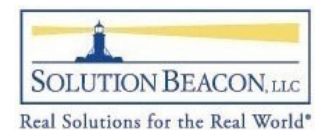
Financials - Payments

- How can the new Oracle Payments application be leveraged to your organization?

- Oracle Payments is now integrated with both Payables (Funds Disbursement) and Receivables (Funds Capture)

  – Improves working capital management

- Oracle Payments can now handle credit card transactions on the funds capture side?

  - Oracle source product creates a transaction
  - The Payments Engine authorizes the transaction

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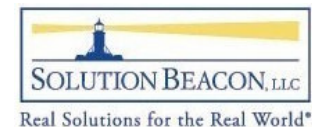SOLUTION BEACON, LLC
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- Are you aware that…
  - The user interface for creating payments is an entirely new process in Release 12?
    - Additional configurations are required to produce payments in Release 12?
  - Oracle Payments can be configured to support either a decentralized or centralized payment process
    - Payment Process Dashboard
    - Funds Disbursement Dashboard

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Funds Capture Source Products

- Payments integrates with the following products to facilitate Funds Capture

  - Collections
  - iReceivables
  - iStore
  - Order Capture
  - Order Management

  - Service
  - Service Contracts
  - Lease Management
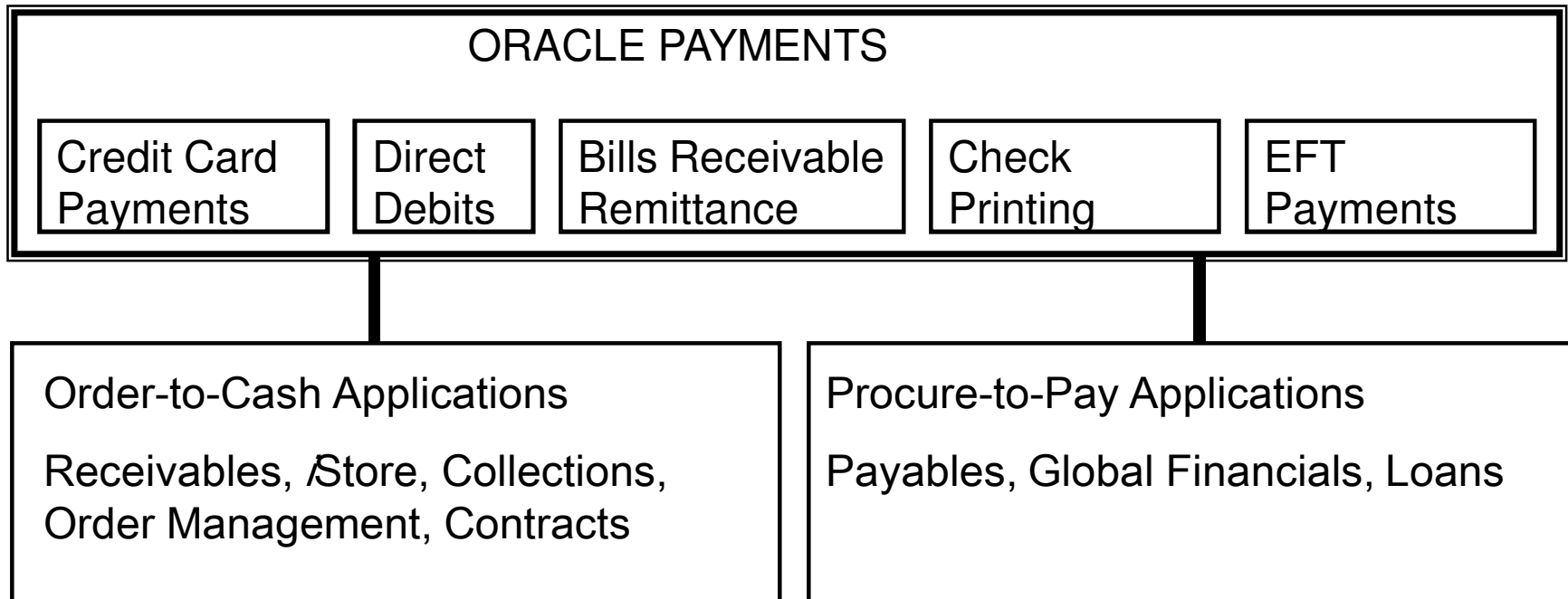 - Receivables
  - Student System

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Third Party Payment Systems/Purchase Instruments Supported Out of the Box

- **Third Party Payment Systems supported out-of-the-box**
- **Only Paymentech is *certified* with Release 12**
- **Refer to MetaLink Doc. ID: 471385.1**

	Credit Card	Purchase Card Level 2	Purchase Card Level 3	PINless Debit Card	US ACH
Paymentech	●		●	●	●
Concord EFSnet	●		●	●	●
Wells Fargo	●	●			●
First Data (North Platform)	●	●			
CyberSource	●	●			
VeriSign	●	●			

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Payment Processing in R12

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Credit Card Payments	Direct Debits	Bills Receivable Remittance	Check Printing	EFT Payments

Order-to-Cash Applications

Receivables, iStore, Collections, Order Management, Contracts

Procure-to-Pay Applications

Payables, Global Financials, Loans

Multiple Applications leverage ONE payment processing solution

iPayments is obsolete in Release 12?

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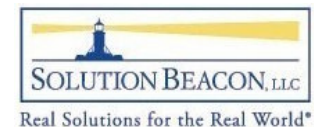
Financials – Procure to Pay

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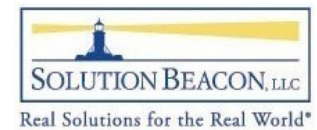
- Are you aware that…
  - Trading Partners can be shared between Payables and Receivables and across operating units
    - Suppliers and Customers share a TCA Party Record
    - Plan for customer and supplier cleanup prior to upgrade
  - Suppliers and Banks forms are now OA Framework forms?
    - Allow adequate training time
  - There is now a lines table for AP Invoices in Release 12 to match the lines table from the PO?
    - Plan for impact to interfaces

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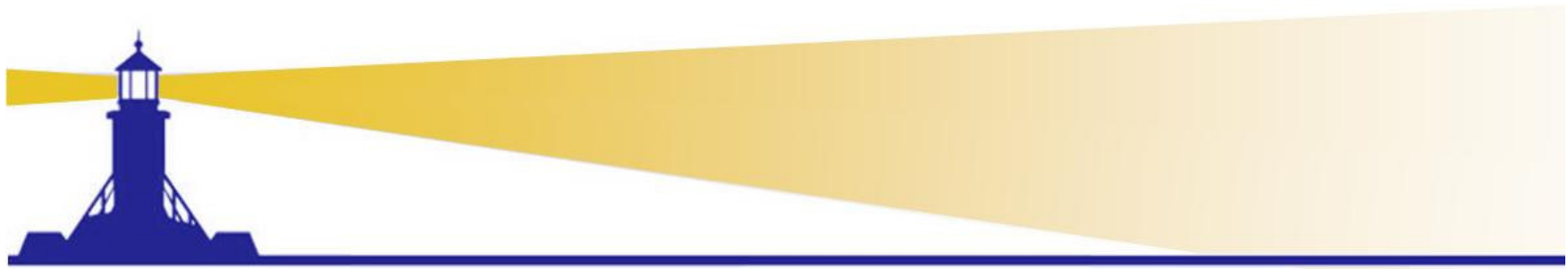SOLUTION BEACON, LLC
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- Are you aware that…
  - Oracle has redeveloped some major forms for Oracle Procurement?
    - Professional Buyer's Work Center
      - Consolidates procurement responsibilities to single command center
      - Streamlined workflows
      - Improved security for shared services organizations
      - Improved Microsoft Word synchronization
      - Integration with Oracle Sourcing and Contracts
      - Personalized Views
  - Release 12 fully supports Contingent Workers?

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- Are you aware that…
  - There is more support for complex goods and services in Release 12?
    - Improved alignment between finance and procurement to monitor supplier performance
    - Better control of payment for complex services
  - Services Procurement now supports progress payments including rate, lump sum and milestone pay items
  - Services Procurement fully supports retainage
    - Capture Retainage Rate and Maximum Retainage Amount on the contract
   - Retainage rate applied to all standard invoices until max is reached

Cash Management

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- The Cash Management application now maintains banks and bank accounts
  - Bank accounts are owned by the legal entity
- Bank accounts are shared by multiple applications (AP, AR, Payroll)
- Bank accounts are now part of the TCA architecture and can be shared across operating units?
- Document sequencing of payments has moved to the Cash Management bank account setup
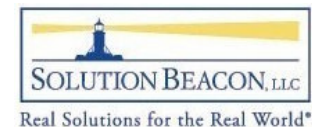- Cash Management now supports Cash Pooling without buying Treasury

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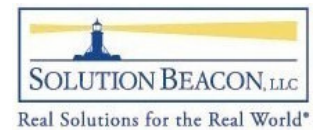
E-Business Tax

- How can the new Oracle E-Business Tax application be designed and leveraged to your organization?

- E-Business Tax provides global control and is a single source for all taxes confronting your organization.

- Utilizes centrally defined rules, rates, and jurisdiction

- E-Business Tax has a rules engine to accommodate complex tax rules.

- Use Taxes are no longer an afterthought – is your company subject to Use Taxes?

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- Are you aware that…
  - Foreign taxes and the currency for those taxes is now supported?
  - There is a Tax Simulator engine to provide for "what if" scenarios to validate tax calculations?
  - A central tax repository provides for reportable audit trail?
    - Schema is XZ
  - Tax rules based on 4Ps
    - Party - legal entity
    - Product – goods or service
    - Process – accounting event
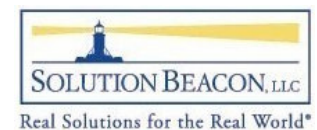   - Place – geographic jurisdiction

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Receivables

- Are you aware that…
  - There is a new refund feature in Release 12?
  - Release 12 also contains automatic netting between Receivables and Payables at the Party level?
  - Some of the collection functionality is no longer included in Receivables?
    - Collection workbench is still in receivables
    - See MetaLink Doc ID: 389443.1 for more details
  - The Customer forms are now OA Framework forms?
  - Backward-compatible views RA_CUSTOMERS and RA_ADDRESSES are no longer available
    - Extensions should reference TCA tables

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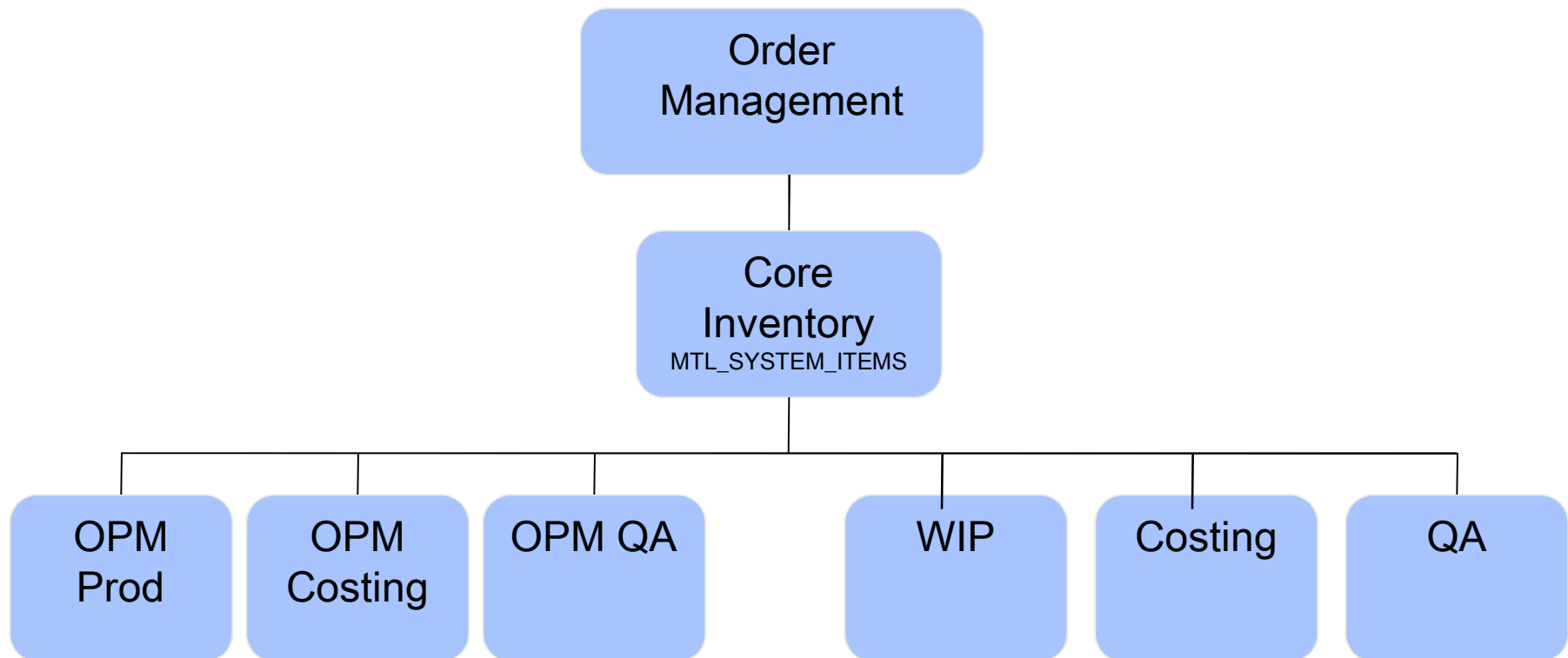Real Solutions for the Real World®

Supply Chain and Manufacturing

- Have Release 12's new genealogy and lot functionalities been understood and leveraged to your organization?

- Are you aware that…

  – The new Oracle Manufacturing Execution System (MES) provides new dashboard controls over the shop floor activities?

  – Release 12 supports Dual Units of Measure?

  – Oracle Inventory services both Discrete and Process Manufacturing?

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Inventory Convergence

- OPM and discrete now share MTL_SYSTEM_ITEMS

```
                    ┌──────────────────┐
                    │      Order       │
                    │   Management     │
                    └────────┬─────────┘
                             │
                    ┌────────┴─────────┐
                    │      Core        │
                    │   Inventory      │
                    │ MTL_SYSTEM_ITEMS │
                    └────────┬─────────┘
        ┌──────┬──────┬──────┴──────┬──────┬──────┐
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  │  OPM   ││ OPM   ││ OPM  │  │ WIP  ││Costing ││ QA │
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- Process Manufacturing
  - Increased supply chain visibility to onhand quantities
  - Vendor managed and consigned inventories
  - Reservations
  - Min/max replenishment
  - Physical inventory and cycle counting
  - Integration with Oracle Warehouse Management System
    - Complex picking rules
    - License plates, putaway rules and task management
- Discrete Manufacturing
  - Dual UOM control
  - Advanced lot control
  - Material Status
  - Enhanced inventory allocation rules

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- Have Release 12's new genealogy and lot functionalities been understood and leveraged to your organization?
  - Track Parent lot and multiple sublots
  - New lot attributes and controls over lots provide new ways to answer questions about shipped items
    - When was the lot retested
    - What grade of material was used in a lot
  - New **Lot Expiry Proc** Workflow
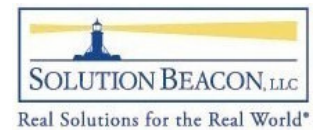   - Notice if lot or serial approaches milestone dates

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- **Chargeable Subcontracting Support**
  - 'Sync' components are meant to arrive at the contractor's facility right before assembly of the ordered item begins
  - comprehensive support across the EBS for managing the underlying transactions

- **Asset tracking location can be required for various inventory transaction types**

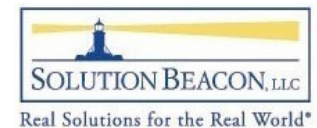- **Will the Deferred COGS account improve revenue recognition in your organization**

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Project Costing

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- Are you aware that…
  - You can now automatically allocate indirect and common costs?
  - Retirement cost processing can be automated?
  - Revenue can be revalued in foreign currency for project customers?

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Database and Architecture

- Will your existing 11i servers meet the increased disk space and performance requirements for Release 12?

- How can the redesigned Oracle iSetup application be used to help load data into your Release 12 environment?

- Are you ready for the modified file directory structure for Release 12?

- Are you ready for the changes at the Java level for Release 12?

- Have you considered the rollout of the new SUN JRE Plugin utilized by Release 12?
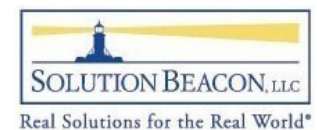
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- Are you aware that…
  - OATM is required for Release 12?
    - Consider implementing OATM prior to upgrade
  - You may need to consider a database upgrade with Release 12
    - Must upgrade to 10g
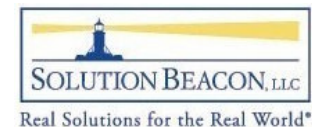   - Release 12 is certified for recent releases of 11g

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Customizations, Extensions and Third Party Products

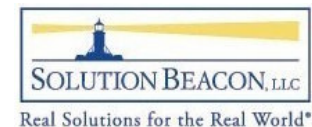SOLUTION BEACON, LLC

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- Have you performed a gap analysis of your current extensions/customizations against standard functionality in Release 12?

- Are your third party products certified with Release 12?

- Can you eliminate any customizations, extensions or third party products

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- *Solution Beacon and Oracle recommends that E-Business Suite customers follow a similar path that Oracle took with E-Business in regards to the use of development tools for upgrades of extensions.*

  – Upgrade existing forms and reports to the latest version of forms and reports -10g for Release 12)

  – Build any new applications using Oracle JDeveloper 10g with ADF

  – Utilize XML Publisher for formatting of report output for new or changed reports

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- PL/SQL
    - Release 12 utilizes the 10g or 11g database version. While there are new PL/SQL features that can improve the code performance, the existing PL/SQL is expected to upgrade without issue

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- Are you aware that…
  - Oracle has redeveloped major forms in Java (Oracle Applications Framework)?
    - Some of your personalizations will need to be redeveloped
      - Any personalizations where the forms technology changed from professional form to an OA Framework form
        - » Customer form
        - » Supplier form
        - » Bank forms
    - OA Framework personalizations are significantly more limited than professional forms personalizations
      - Personalizations
        - » Refer to the Oracle Application Framework Personalization Guide
      - OA Framework extensions which require Jdeveloper modifications
        - » Refer to MetaLink Doc ID: 744832.1 - Oracle Application Framework Developer Guide

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- ## OAF Personalizations
  - Profile options
  - Procedures, Techniques and Examples
  - Migration of OA Personalizations
- ## OAF Extensions
  - JDeveloper Extension support
  - Common Types of extensions
  - Demonstrate Extension techniques
  - Customizing LOV
  - Validating User Input
  - Add checkbox to existing page
  - Custom Data Display (Table Layout)
  - Deploying OA Pages to Oracle Applications Server
  - Deploying Extensions to Oracle Applications server
  - Tips to effectively utilize OA Framework Developer Guide and other MetaLink resources

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- Professional Forms have been upgraded from 6i to 10g
  - The 10*g* developer suite includes a Forms Migration Assistant which will upgrade typically 80% of the functionality and identify obsolete features
    - These obsolete features will be identified by the migration tool but must be resolved manually
    - Obsolete features document for 9i which also applies to 10g
      - http://www.oracle.com/technology/products/forms/pdf/forms_upgrade_reference.pdf

- If EBS seeded forms were customized, any table changes must be corrected

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- Are you aware that?
  - All reports in Release 12.1 are published using BI Publisher?
  - All Oracle reports must be upgraded to 10g reports?
  - Upgrade process
    - Seeded report customizations
      - copy the Release 12 version of the report to your custom report name and perform the necessary changes
      - For formatting changes, create a new XML publisher template and associate the new template with the new custom version of the report
    - Custom reports built from scratch
      - Recompile in Reports 10g
      - Remove deprecated or obsolete functionality
        » http://www.oracle.com/technology/products/reports/10gr2/Reports_guide_to_changed_functionality.pdf
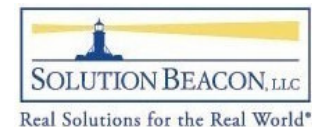   - Correct for any EBS table changes

>400 concurrent processes can be run for Multiple OUs

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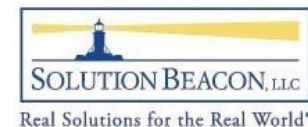
Solution Beacon Technical Resources

- Personalizations – Both OA Framework and Forms
  - Customization Reduction with Forms and OA Framework Personalizations
    - http://www.solutionbeacon.com/CustomizationReduction.pdf
- BI Publisher Quick Start Guide
  - http://www.solutionbeacon.com/BIPublisherQuickStartGuidePresentationc.pdf
  - http://www.solutionbeacon.com/BIPublisherQuickStartGudepaper.pdf
- Diagnostics Presentation and White Paper
  - http://www.solutionbeacon.com/DiagnosticsOAUG09.pdf
  - http://www.solutionbeacon.com/DiagnosticsOAUG2009WP.pdf

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- Impacts to interfaces
  - Have you researched the impact of table changes on interfaces?
    - Some significant interfaces impacted by table changes:
      - AP Invoice imports/exports due to new headers, lines, distributions structure
      - GL invoice/exports due to SLA structure
      - ACH – bank accounts are now in TCA
  - Have you considered the impact of the R12 directory structure on automated processes?
    - How many shell scripts will require updates?
  - Have you reviewed the integration repository for new or changed integration points?

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Impact of Multi-Org on Extensions

- ✓ Customizations which filter data by operating unit must be checked
- Virtual Private Database (VPD) feature will replace usage of CLIENT_INFO(Org Context) function in new Multi-Org Architecture
- Release 11*i* script to access specific operating unit data
    - begin
      dbms_application_info.set_client_info('&org_id'); ⟵
      end;
      /
      select * from po_headers
      /
- Release 12 must request access through Security Policy in the database
    - begin
       mo_global.set_policy_context('S', &org_id); ⟵
    - end;
    - /
      select * from po_headers
      /

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Impact of Multi-Org on Extensions

- ✓ Check programs where concurrent program definition has been customized
- New column MULTI_ORG_CATEGORY added to table FND_CONCURRENT_PROGRAMS
  - value is null on upgrade and concurrent program may not run correctly
- After upgrade, assign one of the following values
  - 'S' = Single Org
  - 'M' = Multi Org
- Example script to set value
  - UPDATE FND_CONCURRENT_PROGRAMS
    SET MULTI_ORG_CATEGORY = {'S' or 'M'}
    WHERE CONCURRENT_PROGRAM_NAME = '{Program Name}'
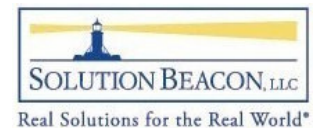
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- iRep describes the Oracle endpoints - Business to Business (B2B) or Application to Application (A2A)
- Interface types in iREP
  - PL/SQL
  - Concurrent Programs
  - Open Interfaces
  - Interface Views
  - Electronic Data Interchange (EDI) Message Transactions
  - XML Gateway Message Maps
  - Java Methods

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Workflow and Fusion Middleware

- What role does BPEL play when compared to Workflow?

- Should you continue to invest in Workflow customizations?

- What about Oracle Alerts – do they continue to function in Release 12? Should they be redeveloped in BPEL or Workflow?

- Are there any new Workflow diagnostics for Release 12?

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- Fusion Applications are not available at this point in time. At Open World 2009, Oracle was very quiet on the topic with emphasis being given to Release 12.1.1.
  - The general sense that was derived at the conference was that Fusion Applications may not be available for general release until well after the desupport of version 11.5.10.2 which more firmly engrains Release 12 in the Fusion Application planning path.
  - Do not rely on Oracle to release Fusion Applications prior to desupport of 11.5.10.2.
- Note that Fusion Applications is not meant to include the Fusion middleware products, which are currently available and are deployed with Release 12.

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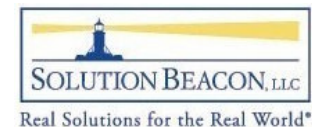Real Solutions for the Real World®

- For Release 11i.10, the general availability date was November 2004. Normally this would mean that Premier support would end November 2009. Oracle has extended this date by one year until November 2010. Extended Support thus now ends November 2013

◢ LIFETIME SUPPORT EXCLUSIVE BENEFITS

Key Feature	Premier Support	Extended Support	Sustaining Support
Major Product and Technology Releases	●	●	●
Technical Support	●	●	●
Access to Support Portal	●	●	●
Updates and Fixes	●	●	Pre-existing
Security Alerts	●	●	Pre-existing
Critical Patch Updates	●	●	
Tax, Legal, and Regulatory Updates	●	●	
Upgrade Scripts	●	●	Pre-existing
Certification with Existing third-party Products/versions	●	●	
Certification with most new third-party products/versions	●		
Certification with most new Oracle products	●	●	

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- The pricing for the various levels of support is contained in the "Oracle Premier Support and Oracle Lifetime Support Policy Frequently Asked Questions January 15, 2008
  - http://www.oracle.com/support/library/oracle-lifetime-support-policy-faq.pdf.

- Support Pricing
  - Premier support - standard price is 22% of list
  - Extended Support
    - First year of - 10% surcharge is added to the current annual fee
    - Years 2 and 3 20% surcharge is added to the current annual fee.
  - Sustaining Support - surcharge is removed.

Training

- How will your functional users be trained on the new navigation and processes in R12?

- Do you have a training plan for your technical team?

  – Technical application support training

  – Jdeveloper

  – OA Framework

  – Personalizations

  – R12 directory structure

  – 11g database

  – XML publisher

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Summary

- Release 12 is full of features
- The R12 upgrade process is better than previous upgrades
- 11i to 12 cannot be compared to a dot release for 11i
- Do not under estimate the time needed for:
  - Planning
  - Testing
  - Training

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Additional Solution Beacon R12 Planning Presentations

www.solutionbeacon.com/ind_pres.htm

- Release 12 Financials Best Practices Multi-Org Access Control & Subledger Processes
- Release 12 Financials Best Practices Subledger Accounting and the General Ledger
- Release 12 Oracle E-Business Tax Engine
- Planning for Release 12
- Release 12 Oracle Payments The Centralization of Payment Processing
- Release 12 Procurement - Professional Buyer's Work Center
- Transitioning from Account Generators to the R12 Subledger Accounting Engine
- Diagnostics - Maximize Efficiency of Oracle E-Business Suite Release 11*i*/12 through Diagnostics
- 2008 page – more on Projects, Supply Chain, CRM, Security, Java, etc…
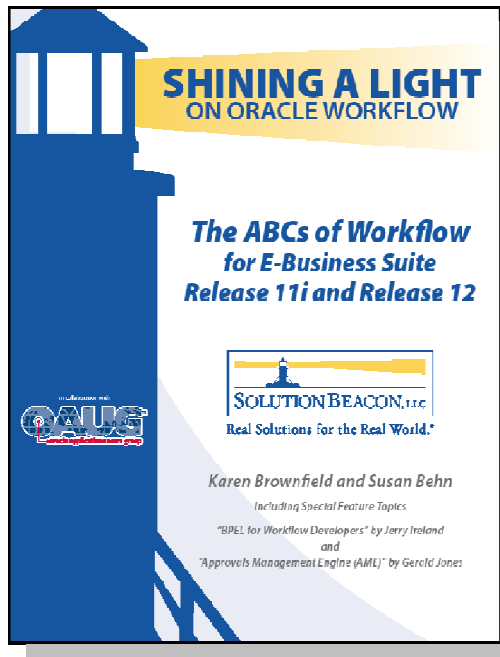
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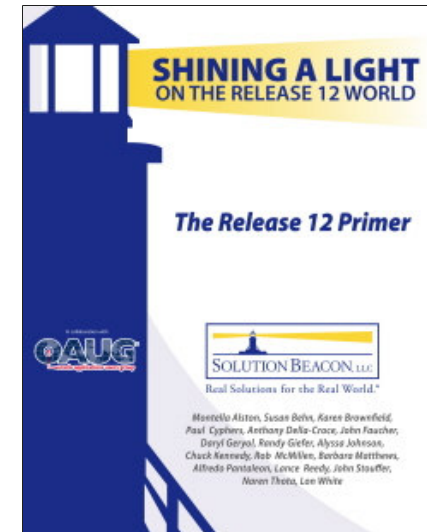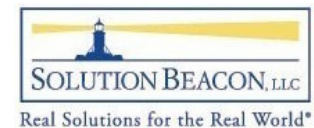Real Solutions for the Real World®

Got Oracle?
Get the Books!
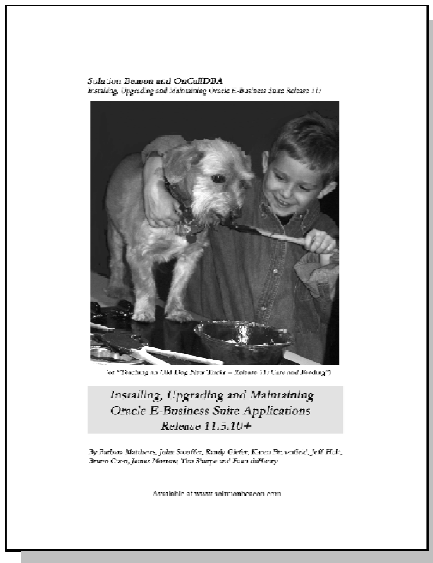
Installing, Upgrading and Maintaining Oracle E-Business Suite Applications 11.5.10.2+

The ABCs of Workflow for Oracle E-Business Suite Release 11i and Release 12

The Release 12 Primer – Shining a Light on the Release 12 World

Ranked Scorecard
Free Consultation

How Does The Scorecard Work

- Answer multiple-choice questions
- Identify areas of risk (business and IT)
- Ranked score helps measure your status on issues
- Provides recommendations for next steps
- Feedback on issues that concern steering committees and ROI

Scorecard Focus Areas

- Competitive Optimization
- Functional and Process Issues
- Project Approach and Complex Issues
- Workflow Issues
- Customization Reduction
- Database
- Data Integrity
- System Optimization
- Business Intelligence

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Questions and Answers

Thank You!

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