



R12 Upgrade Program Overview
for
NorCal OAUG

October 25, 2011

Topics

- Upgrade Drivers
- Pre-Upgrade Environment
- Target Upgrade Environment
- Process and Timeline
- Three Biggest Challenges
- Major Successes and Improvements

Upgrade Drivers

- Oracle's end of life schedule for current 11i environment
- Decision to implement new Oracle applications
 - HCM
 - OBIEE
 - EPM
- Desire to improve current processes and operations by implementing new and/or previously unused features

Pre-Upgrade Environment

- Hosted by Oracle On Demand
 - OS - Linux
 - DB version 9.2
 - Three instances (Prod, Dev and Test)
- Applications version 11.5.10.1
- Applications/Modules
 - Financials (GL, AP, AR, CE, FA)
 - Procurement
 - iExpense
 - iProcurement

Post Upgrade Environment

- Hosted by Oracle On Demand
 - OS - Linux
 - DB version 11G R2
 - Three instances (Prod, Dev and Test)
- Applications version 12.1.3
- Applications/Modules
 - Financials (GL, AP, AR, CE, FA)
 - Procurement
 - iExpense
 - iProcurement
 - *HCM (HRMS, OAB, OTL, Employee and Manager Self Service, Comp Workbench)*
 - *OBIEE (Financial, Procurement and HCM Analytics)*
 - *EPM (Planning)*
 - *UPK (used extensively for HCM, iProcurement and iExpense)*

Process and Timeline (R12 Upgrade with OBIEE)

- 7 Month Implementation
- Planned 2 CRPs and 1 Dry Run
 - CRPs tested functionality
 - Dry Run tested Cutover
- First CRP was an iterative process with Delta Workshops
- Communications Plan and Change Management were Key
- HCM and EPM plans were independent with the exception of testing cycles for CRP2 and Dry Run to support end-to-end testing and audit approval
- **Red** items are technical upgrade tasks
- **Green** items are major Go Live related activities

ID	Task Name	Duration	Start	Finish
1	RAMBUS R12 Upgrade Project	191 days	Mon 12/6/10	Fri 9/9/11
2	Initiation	10 days	Mon 12/6/10	Fri 12/17/10
3	Project Management Activities & Planning	10 days	Mon 12/6/10	Fri 12/17/10
8	Requirements and Analysis	40 days	Tue 12/7/10	Wed 2/9/11
9	Initial Upgrade Assessment	9 days	Tue 12/7/10	Fri 12/17/10
11	OOD Instance Creation/First Upgrade Iteration	27 days	Mon 1/3/11	Wed 2/9/11
14	Design	68 days	Mon 12/20/10	Mon 4/4/11
15	Delta Workshops and CRP1 - Iteration 1	68 days	Mon 12/20/10	Mon 4/4/11
25	Determine Communication Strategy and Approach for Change Management (OCM)	3 days	Mon 3/28/11	Wed 3/30/11
26	Determine Training Strategy and Approach	2 days	Thu 3/31/11	Fri 4/1/11
27	Approve Communication Plan and Training Strategy	2 days	Mon 4/11/11	Tue 4/12/11
28	Development	105 days	Mon 1/31/11	Tue 6/28/11
29	OBIEE (Financial and Procurement Analytics and Answers)	82 days	Mon 2/7/11	Thu 6/2/11
36	Create Instance Strategy Document	5 days	Tue 4/5/11	Mon 4/11/11
37	Approve Instance Strategy Document	1 day	Tue 4/12/11	Tue 4/12/11
38	R12 Technical Development	105 days	Mon 1/31/11	Tue 6/28/11
47	Test	119 days	Mon 3/28/11	Fri 9/9/11
48	CRP2 - Iteration 2	54 days	Mon 3/28/11	Fri 6/10/11
75	Dry Run - Iteration 3	74 days	Tue 5/31/11	Fri 9/9/11
76	Perform Third Upgrade Iteration	5 days	Mon 6/6/11	Fri 6/10/11
77	Dry Run Validation and Acceptance	23 days	Tue 5/31/11	Thu 6/30/11
84	Review/Sign-off Dry Run	0 days	Thu 6/30/11	Thu 6/30/11
85	Release PRAM2i back to OOD for Production Upgrade	1 day	Fri 7/1/11	Fri 7/1/11
86	Create Requirements Traceability Matrix	5 days	Mon 6/27/11	Fri 7/1/11
87	Review and Approve Requirements Traceability Matrix	1 day	Tue 7/5/11	Tue 7/5/11
88	Revise Impacted SOX Controls	60 days	Mon 6/20/11	Fri 9/9/11
89	End User Training Preparation	39 days	Thu 6/2/11	Mon 7/25/11
90	Deliver End User Training	3 days	Tue 7/26/11	Thu 7/28/11
91	Deployment	42 days	Tue 5/31/11	Tue 7/26/11
92	Final Production Release Approval (Go/No Go Decision)	0 days	Thu 6/30/11	Thu 6/30/11
93	Final Production Release Tasks	37 days	Tue 5/31/11	Thu 7/21/11
97	Perform Final Production Upgrade Iteration and CEMLI Load - note actual start is 6:00 pm PDT on 7/21	3 days	Sat 7/23/11	Mon 7/25/11
99	Begin Controlled Production Release (Go Live)	1 day	Tue 7/26/11	Tue 7/26/11
100	Project Close	26 days	Wed 7/27/11	Wed 8/31/11

Three Biggest Challenges

Challenge	Remediation Approach
Coordination with hosted Environment for technical upgrade tasks	<ol style="list-style-type: none">1. Created a comprehensive master control sheet with all tasks and tested/refined it through each upgrade iteration2. Frequent control meetings
Concurrent Implementations with Multiple Partners (HCM, OBIEE, EPM)	<ol style="list-style-type: none">1. Strong independent PMO for program coordination2. Heavy focus on testing cycles and environment strategy
User Availability	<ol style="list-style-type: none">1. Scheduled analysis sessions and test cycles during weeks with least demanding business activities2. Recommended backfilling where needed3. Utilized UPK to reduce support requirements during final release activities4. Ensured that all prerequisites were completed before users were required to participate in any activity (system stability and preparation were key)

Major Successes and Improvements

- Upgrade completed successfully within planned timeline and budget
 - No Sev 1 issues
 - Enhanced production support process was put in place to provide immediate response and remediation of issues
 - Minimal Sev 2 issues (under 5)
 - Many new features within R12 incorporated into business processes
- HCM, OBIEE and EPM implementations completed and integrated as planned
- UPK used extensively for documentation and training

Questions and Wrap-up