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Moving to EBS R12 with Oracle Upgrade Labs

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Jan 13, 2011



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IT Drivers	Business Drivers
Supportability	New modules
Stability	New features and functionality
Improved performance	New requirements
New Features	Operational efficiency
Reduce maintenance cost	Design improvements
Out of box use	Opportunity to re-engineer
Retire Customizations	More business-handling Capabilities



Based on objectives, footprint, complexity and user base, which approach is right for you?



This Session will focus on the Technical Upgrade Approach

Typical Upgrade Activities

Technical Upgrade (via Labs)

- ✓ Provide Platform upgrade, if necessary
- ✓ Upgrade Oracle Application Server, Oracle Database, and Oracle Forms and Reports
- ✓ Upgrade Release 11.5.x applications to Release 12
- Perform repeatable CRP Test Upgrades to document migration steps and reduce downtime
- ✓ Enable smooth Production upgrade

CEMLI Upgrade

- Identify CEMLIs & determine complexity
- Evaluate R12 functionality & determine technical impact on CEMLIs
- ✓ Upgrade CEMLIs to the new technology stack
- ✓ Retrofit CEMLIs for compatibility & usability on R12
- ✓ Test CEMLIs to confirm execution

Production Readiness & Post Go-Live Support

- Confirm Production Readiness
- ✓ Post Go-Live support
- Stabilization

Functional Upgrade/Testing

- Ø Determine impact of R12 on current business flows
- Determine setups to accomplish business processes
- ✓ Assist in resolution of functional issues
- ✓ Update existing E-Business Suite test scripts to reflect valid navigation paths for R12
- ✓ Develop new R12 test scripts
- ✓ Perform Regression, Performance, SIT & UAT Testing

Project Management

- Plan and manage schedule, tasks and Tollgates
- Track scope risks, issues, actions, quality, resources

Change Management

- Communication to stakeholders
- End User Training
- Assess Up/down stream impact
- Ready Trading Partners

Approach to R12 Upgrade

Mon	th 1			Month X
	Trial Iteration (Impact Analysis & Trial Upgrade)	Iteration 2 (Reference Process)	Iteration 3 (Timing round , Perf, and UAT)	Final Iteration (Production cutover)
Tech/ Lab Upgrade (EBS Upgrade from 11.5.10.2 to 12.1.X	Initial Trial Upgrade Iteration to validate impact of upgrade to 12.1.X	Test iteration focused on refining and documenting the reference process	Second test iteration focused on Timing for cutover	Production Cutover
CEMLI Retrofit	Apply all current CEMLIs and identify those that need retrofit	Develop and test CEMLI's. Support SIT.	CEMLI break/fix during UAT	Break/Fix support
R12.1.X Functional Configuration	Functional Impact Verification	Functional Validation of setups and processes	Functional Validation of setups and processes with Users	Functional Support
Testing and Validation	Testing to verify CEMLIs and Functional processes	Function/ System Integration Testing	User Acceptance Testing, and Performance Testing	
Change Management	Communication	Communication Change impact Assessment Training Content	Develop End User Training	Training Delivery

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High Level Upgrade Roadmap - example



Upgrade Labs Services - Benefits

Over 500 Successful Technical Upgrades

Features

- Fixed Price
- Standard Processes and Best Practices
- Knowledge Transfer
- End-to-end Lifecycle Management
- Utilize Global Upgrade Project Team
- Automated Tools Accelerate Project Timeline

Anticipated Benefits

- Speeds Upgrade and Time to Benefit
- Reduced Cost
- Reduced Risk
- Lower Total Cost of Ownership
- Unparalleled Experience

Unparalled Experience

- Oracle Upgrade Labs Consultants deliver upgrade services every day of the week during every week of the year.
 - The Labs have been performing this service for over 10 years.

Reduce Cost & Risk

- Oracle Upgrade Labs services are fixed fee.
- The efficiencies built into our process enable low cost, value-added services in a specific time frame.

Follow the Sun Model

- The Upgrade Labs leverages a blended delivery model with resources spread across North America and India.
 - 24x7 work mode to monitor long running upgrades

More Efficient Use of your time and resources

 Each upgrade brings with it a unique set of technical and process challenges. The upgrade tools change, as do the methods by which the tools are executed. By utilizing the Labs you eliminate the expense associated with developing in-house expertise.

Relationship with Development & Support

- The Upgrade Labs resources are tightly linked with our development and support organizations.
- The Labs work with early adopter programs and test pre-release versions of the applications.

Less Post Upgrade Work

Upgrades performed by the Labs includes all post-release maintenance
 pack tasks including the application of help patches and any additional
 patching pursuant to the Oracle Application Release Notes.

Upgrade Assessment – Sample Tools and Templates



LEVERAGING NEW FUNCTIONALITY **RECOMMENDATIONS & VALUE** Accounts Receivable OBSERVATIONS RECOMMENDATIONS Consider Oracle E-Business Suite Accounts Receivable functionality to provide integrated A/R data to G/L Provides betier data structure and flexible search capabilities DSO ~ 10 days overall Multiple systems requiring duplicative customer entry Direct integration to existing ORCL G/L and AP data; reduces interfaces and manual handoffs Numerous special handling procedures (known by one or a few staff) across the A/R process BENEFITS A/R system reuses invoice numbers Integrated data allows for automated drill-back from G/L to A/R transactio data resulting in Invoice #-Customer Name collisions Consolidated cash management as a result of single location for A/R, A/P, Repeat entry of common data required in current system – opportunities for error and G/L data

required in current system opportunities for moments or cache Securates branch and branch to cach locget opportunities of moments or cache Securates branch cache conclusions transformation or cache standard export functionality for additional manipulation of any taction transfer field United search functionality causes information and responding to internal and customer requests Ven and crock transponding to amonitorities that DOV(we required to search to tack DOV(we required to search to tack tackk

IMPROVEMENT RECOMMENDATIONS

Business Process Analysis					Current Target		
	Importance	Marginal	s	table	Best Practice	Transformational	
Order Taking	High	•			→ •		
Observations - Marginal curve to Cash process and Order Taking supprocess instantly - Order Emity scanal for 4.2% of all entrarturedits across the Quarks to Cash process - RadPronceRimal anders have a standard MK entor rate – accounting for 56% of all Calder Erroy arrows - (44%) - On average each CBR spends 2.7 hoursday on entor measuring and contentions (species Cambridge of A adulation - Cash and CBR spends 2.7 hoursday on entor measuring and contentions (species Cardena)		* * *	Recommendations > Facco minymetry factures theory contrast networks and the second second second second proton minymetry and second second second second and contrast second second second second second second second second second second second second and contrast second se				
 Undocumented order taking processes and procedures contribute to order inaccuracy. High kevel of manual ada entry with insufficient data validity checks contributes to order inaccuracy. – 143 steps, 97 steps of which are opportunities for user error in judgment analor data entry 			ps; >	Expected Benefits > \$4,585m amual CSR time savings with Fax & Email/Phone Order Taking and associable error correction costs > 47% reduction in Order Entry cycle time > 68% reduction in Order Entry user steps > 87% reduction in Opportunities to Error			

CUSTOMIZATION (CEMLI) ANALYSIS



BENEFITS ANALYSIS / ROI



UPGRADE ROADMAP



CEMLI Assessment

CEMLI Objects Inventory Analysis Process

- Oracle's CEMLI analysis tool is used to drive accurate estimation of technical upgrade tasks and reduce overall project effort/time in analyzing your existing environment.
- It compares your current inventory of application objects with a vanilla (uncustomized) environment at the same release level to isolate CEMLIs requiring attention.
- Output is used to target your development efforts on CEMLIs requiring the most retrofit

Complete Questionnaire



Run Scripts

Refined CEMLI Retrofit Plan

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Interpret Output

Technology Upgrade Considerations

Focus Areas	Considerations / Best Practices
Instance Consolidation	 Total # of instances, modules, customizations. Also future integration strategy, phased upgrade/ rollouts and high availability architecture. Leverage tools (iMerge) where possible.
CEMLIs and Customization Strategy	 Total number of CEMLI's and extent of customizations. Identify # of CEMLIs to be retained / obsoleted. CEMLI strategies to consider include CEMLI remediation, reduction, rearchitecture and elimination via BPR. Leverage Offshore CEMLI services for CEMLI Assessment at object level and CEMLI remediation/retrofit, CEMLI reduction and standardization services.
Technical Architecture Strategy	 Database upgrade, OS upgrade or switch (Linux, Sun etc), RAC implementation, High Availability Architecture, Security considerations. Leverage R12 features such as Staged Applications System feature to reduce patching downtime. Db Initialization Parameter settings provides maximum availability and automatic memory sizing feature in R12.
Database Size and Version	 Existing patch and version levels, and new version to upgrade to. Database size increases approx 30% and needs to be planned for. Automated cloning / Platform Migration can be done.
Integration Strategy	Re-implement existing interfaces or re-Architecture of integrations leveraging SOA.
Reporting Strategy	 Leverage enhanced BI reporting in R12 to revisit custom reports and current reporting strategy.
Data volume and history	 Data conversions may be necessary for a re-implementation strategy or in instance consolidation scenarios. In- place upgrades will require validation and testing but no conversion effort.
Performance Considerations	 Performance architecture focus from project start to ensure performance testing for high transaction scenarios, Automation of testing processes, downtime considerations, cutover planning, response time and throughput considerations.
Upgrade Process	 Checklists for pre and post upgrade steps, conduct minimal 3 test upgrade iterations (trial upgrade, process validation, timing round) and multiple for complex upgrades, leverage upgrade Labs for expertise, speed and process knowledge.
Testing Considerations	 # of automated test scripts for function, regression and performance testing, Downstream test cycles for SIT and UAT.
Other Considerations	Languages, Countries, Operating Units.

Critical Success Factors



Upgrade Services

Labs Value Proposition and Lessons Learned

Labs Value Proposition

- Lower the cost of your upgrade project
 - Leverage lower cost remote resources
 - Defined scope offered at a fixed price providing predictability
- Strategic use of resources
 - Less or no ramp up time
 - Extension of your team enabling concurrent activity
- Minimize business risk
 - Proven model for remote delivery
 - Resources only focused on eBusiness Upgrades

Lessons Learned

- Test and Re-Test
 - Testing and validation is critical to success of the upgrade
 - Oracle team can help identify areas and processes requiring special attention based on our previous projects
 - Test your business processes not only with new transactions, utilize upgraded data (upgraded invoices etc)
- Other
 - Review latest certifications and alerts to identify know issues and solutions
 - Identify data that can be upgraded/ migrated outside of the "Go-Live" window



R12 Upgrade Customers and Case Studies



Oracle Proprietary - Upgrade Services

R12 Customers



GAP Oracle E-Business Suite Upgrade

COMPANY OVERVIEW

 Name: Gap Inc Industry: Retail Employees: 150,000 Revenue: \$16 billion Location: San Bruno, CA and San Francisco, CA Background: Gap Inc. is a leading international specialty retailer offering clothing, accessories and personal care products for men, women, children and babies under the Gap, Banana Republic and Old Navy brand names.

CHALLENGES/OPPORTUNITIES

- Gap had been running on Oracle Financials, Purchasing, and Projects since 2004. They were stable on Oracle Applications release 11.5.8, but faced with the following challenges:
 - Oracle E-Business Suite Premier Support ended
 November 2007
 - Existing system did not fully support local statutory requirements and inter-company accounting controls for Gap
 - Existing System does not provide a direct path to next generation Oracle solutions ("Fusion")

SOLUTION/ PROJECT HIGHLIGHTS

- The Oracle Solution consisted of an upgrade to release 12. The upgrade of Gap's single 11.5.8 instance included: GL, AP, FA, iExpense, PO, iProcurement, Project Costing, AR, and iSupplier Portal. Services Included:
 - ➤ Core Upgrade Project Team providing support for the 12 month project plus 1 month of post production support
 - International Leads in Japan, Hong Kong, and the UK
 - Technical Upgrade services for CRPs 1-4 and production cutover via Upgrade Labs
 - Hosting of the project environments for CRP1 and CRP2 (ASC)
 - Update and Migrate 1149 CEMLI's
 - Automation of test scripts using the Mercury test tool
 - Execute test scripts using onsite/offshore resources and automated test scripts
- Oracle Upgrade Lab used to reduce risk and cost.
- Oracle Consultings Global Services used for a lower blended rate for the upgrade effort for the CEMLIs, update and automation of test scripts, and testing services to provide a predictable outcome.

Agilent – Lifecycle Approach



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- Oracle Consulting is a leading implementer of Oracle products and one of the largest consulting organizations in the world
- Global Delivery Capabilities
- 145 Countries
- 15,000+ Consultants
- 2,500 + Implementation Projects Annually
- Proven methodologies and reusable assets
- Trained to introduce and exploit new technology
- In the business of implementing *only*
 Oracle products for more than 25 years

Speed, Value, Simplicity



