

# Oracle R12.1 Implementation and Upgrade – Lessons Learned

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# Introduction



- Jim McDonough, Director, AXIA Consulting
  - 21 years in consulting
    - Andersen Consulting / Accenture
    - Perot Solutions Consulting
    - AXIA Consulting
  - Oracle Financials since 1993

# Agenda



- Project Profiles: 2 R12 Upgrades, 1 R12 Implementation
- Project Planning – Key Tasks and Lessons Learned
- Project Execution – Key Tasks and Lessons Learned

***Project Manager / PMO Perspective***

# Project Profiles

# Project Profiles - Scope



Industry	Utility	Manufacturing	
<b>Project</b>	Upgrade	Upgrade	Implementation (roll-out)
<b>Modules</b>	GL (XLA), FRM, ADI, AP (IBY), AR, PA, FA, ICM, CE, OKS, PO, ICX, INV, MSCA, ONT, HR, CWB, SSHR, Discoverer	GL (XLA), ADI, AP (IBY), AR, PA, FA, ICM, CE, PO, INV, ENG, BOM, WIP, MRP, CST, ONT, CZ, HR	GL, XLA, ADI, AP, IBY, AR, PA, FA, ICM, CE, PO, INV, ENG, BOM, WIP, MRP, CST, ONT, CZ, HR, Vertex
<b>Version</b>	11.5.10 to 12.06	11.5.10 to 12.1.2	12.1.2
<b>User Count</b>	~700	~600 (has since grown to ~1200)	~200 additional

# Project Profiles - Schedule



Industry	Utility	Manufacturing	
<b>Project</b>	Upgrade	Upgrade	Implementation (roll-out)
<b>Duration</b>	9 months including planning / prework	7 months including planning / prework	8 months
<b>Go-Live</b>	Oct-09	Apr-10	Feb-11
<b>Post Go-Live support</b>	~ 2 months	< 1 month	~ 3 months

# Project Profiles - Resources



Industry	Utility	Manufacturing	
<b>Project</b>	Upgrade	Upgrade	Implementation (roll-out)
<b>PM / PMO FTE</b>	1.0 internal 1.0 consulting	0.8 internal 0.5 consulting	1.8 internal 1.0 consulting
<b>IT Analyst FTE</b>	4.75 consulting	2.5 internal 2.0 consulting	3.0 internal 5.0 consulting
<b>Data Conversion Analyst FTE</b>	N/A	N/A	4.0 consulting
<b>DBA FTE</b>	2.0 internal	~2.0 (Hosted)	~2.0 (Hosted)
<b>Developer FTE</b>	2.0 consulting	1.0 internal 2.0 consulting	1.5 internal 2.5 consulting
<b>SME</b>	20 people	10 people	45 people

# Project Planning

# Business Case



- Confirm project goals and objectives, drivers
  - Specific functionality
  - Remain current / avoid desupport
- Calculate ROI
- Now is the time to evaluate Upgrade vs Re-implement
  - What are the current pain points?
  - What are the potential solutions to those pain points?
  - Which of those potential solutions absolutely require re-implementation?
  - Re-implementation could cost 1.5x to 2x, what is that ROI?

***Reaching agreement with Executives on why the project matters will be important to secure resources***

# Project Charter



- Goals and Objectives
- What's in scope
- What's not in scope
- Schedule Constraints
- Relationship with other Projects
- Success Measures
- Signed

- **Seek input from key stakeholders and SMEs to create the Charter**
- **A signed charter with documented scope and success measures is effective**

**Project Charter**

<b>Project Name</b>	Oracle ERP R12 Upgrade
<b>Plan Year</b>	2009
<b>Project Sponsor(s)</b>	XXX
<b>Project Manager</b>	Jon Riley
<b>PMO Rep</b>	XXX

**Opportunity Statement**  
 XXX has made a long-term strategic investment in Oracle ERP as an enterprise solution supporting the following applications:

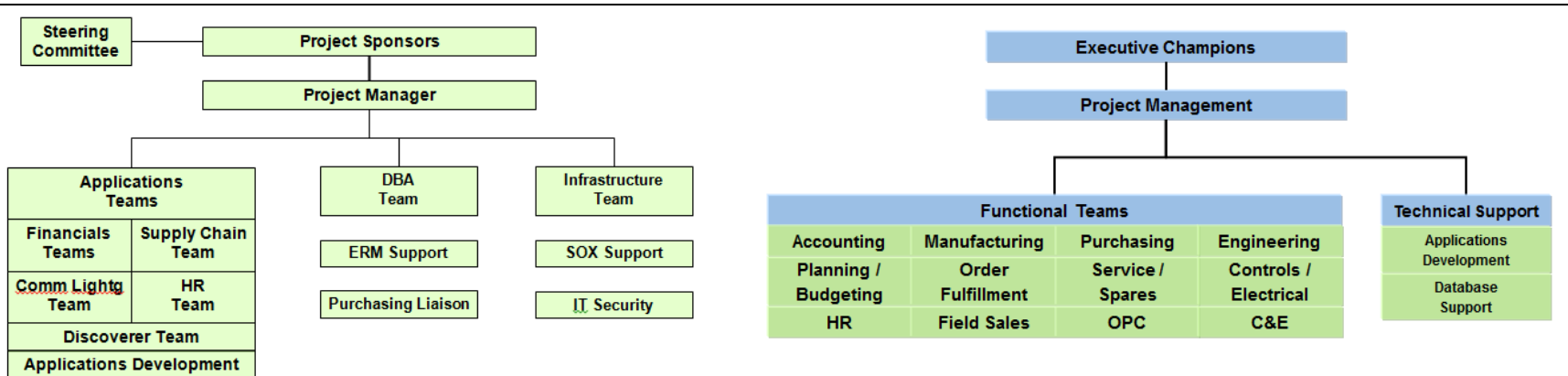
- Financials (including General Ledger, Payables, Receivables, Project Accounting, Asset tracking, and financial reporting)
- Supply Chain (including Procurement, Inventory Management, and Materials Management)
- Human Resources

The hardware supporting Oracle ERP is approaching the end of its useful life, replacement hardware was purchased in 2008. The ERP applications software currently in use will be de-supported by Oracle in 2010. The versions of Oracle Discoverer and Evergreen currently in use in parallel with Oracle ERP are no longer supported.

Given the mission-critical functions running on Oracle, it is important to manage risk by remaining current with vendor-supported hardware and software. Using unsupported versions exposes the organization to significant risk. The likelihood of encountering issues increases because vendors stop providing maintenance patches proactively. And if issues do occur, both the time and expense for issue resolution increase.

Approver Name	Role	Signature
Jon Riley	Project Manager	Riley, Jon Feb 3 2009 1:20 PM
Scott Denuit	Project Sponsor	Denuit, Scott C. Feb 3 2009 2:11 PM
Bill Henningsen	Project Sponsor	Henningsen, Bill Feb 3 2009 2:33 PM
Dave Herman	Steering Committee, MvLT Billing	Herman, Dave I am approving this document Feb 2009 11:44
Mike Inhoff	Steering Committee, Supply Chain	Inhoff, Mike Feb 3 2009 5:27 PM
Ofer Manosvitch	Steering Committee, Accounting / Finance	Manosvitch, Ofer I am approving this document Feb 2009 11:06
Shawn Stapleton	Steering Committee, HR	Stapleton, Shawn I am approving this document Feb 2 2009 3:01 PM

# Project Team Organization



- Identify Sponsors/Champions by name
- Define functional teams (testing teams)
- Define technical teams

***Formality/structure helps define and communicate roles***

# Communication Plan



- May Include
    - Team Portal / SharePoint (great place to maintain project calendar and post announcements such as planned downtime for patching)
    - Scheduled presentations (project kick-off, phase kick-off, Steering Committee)
    - Scheduled status meetings (for upgrades, strongly recommend routine status meetings with DBAs!)
    - Periodic status reports
  - Define how delivered (meeting, published)
  - Define owners/authors
  - Define audience
- ***Define this plan upfront and commit to it***
  - ***Kick-off meetings for each phase are beneficial***

# Project Kick-off



- Present the Business Case
- Explain Scope
- Present Project Organization, Roles, Schedule
- Explain each Phase
- Explain where, how to log issues
- Explain plans for managing Production Support (break/fix and enhancement requests) in parallel with the project

***Invite all team members and stakeholders***

# Technical Pre-work



- Migration to OATM
- Database Upgrade
- JRE Upgrade
- Internet Explorer Upgrade

***JRE upgrade can be problematic:***

- ***Difficult to control, police***
- ***Some legacy PC applications may not work***

# Functional Pre-work

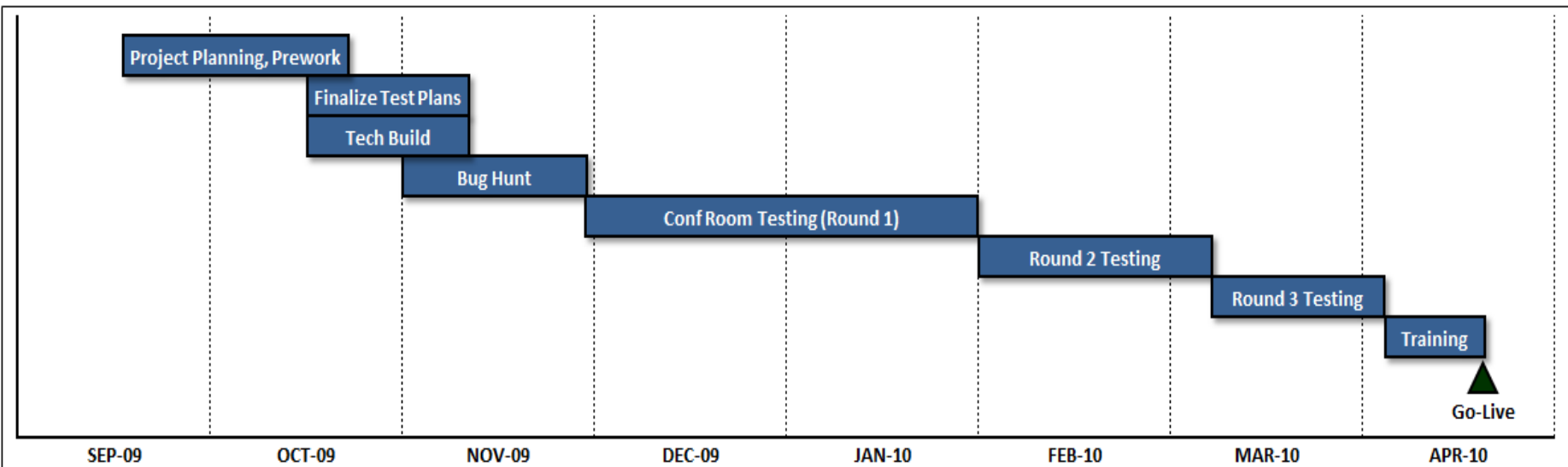


- R12 Delta sessions
- Oracle TOI sessions, facilitated
- Get and use Oracle Diagnostics scripts
- Custom Objects (RICE) Inventory, do you know what you have?
- Custom Object scrub, do you know what you need?
  - Run stats on how often concurrent requests are run
  - Ask your SMEs
  - Reconcile to test plans

***A lot of progress can be made before  
the first environment is available***

# Project Execution

# Phases



Phase	High-level Description	Start	End
Finalize Test Plans	Conduct Test Plan workshop. Update existing test plans.	10/18/09	11/11/09
Tech Build	Build first R12 environment.	10/18/09	10/30/09
Bug Hunt	Test basic functionality. Test known R12 issues. Patch.	11/2/09	11/27/09
Round 1	User testing. Follow test plans. Iterative. More patching.	11/30/09	2/12/10
Round 2	User testing. Execute test plans. Patching winding down.	2/15/10	3/19/10
Round 3	Final user testing. Patch freeze.	3/22/10	4/5/10
Training / Cutover	User training. Finalize upgrade schedule and coordination. Go Live.	4/5/10	4/19/10

# Finalize Test Plans



## Objectives

- Identify all business scenarios to test (comprehensive test plan)
- Incorporate tests of all custom enhancements
- Ensure consistency of format, level of detail (quality)
- Develop upgrade testing work plans (efficiency)

## IT Lead Activities

- Provide test script workshop
- Support test plan development
- Review test plans for completeness
- Review test plans for consistency

## SME Activities

- Participate in test script workshop
- Review existing test plans
- Develop test plans for R12 upgrade
- Review cross-functional test plans

- ***Leverage existing test plans if available***
- ***Cross-reference custom objects to test plans***
- ***Assign IT Analysts to review the test plans***

# Tech Build



## Objectives

- Create the first R12 test environment for DBA testing
- Create the first R12 test environment for the functional teams

## IT Lead Activities

- DBAs create the environments
- IT Leads perform preliminary checks

## SME Activities

- None

- ***Do not under-estimate this task; plan a month for DBAs who have not done this before***
- ***Consider scheduling this task ahead of project resource ramp-up, possibly before project kick-off***
- ***Even if you plan to use internal DBA resources, consider seeking experienced resources for this task***

# Bug Hunt



## Objectives

- Establish / ensure stable environment ahead of user testing
- Apply and test most critical patches

## IT Lead Activities

- Test core functionality
- Bug-hunt, log issues, work patches
- Meet with SMEs as necessary to review current business processes

## BPO Activities

- Participate in process review meetings as requested

- ***Make a positive first impression for users when they see and use R12 for the first time***
- ***IT resources with past R12 upgrade experience will know specific functions to target for testing***
- ***Loosely follow test plans, but testing is not comprehensive and typically not documented in this phase***

# Round 1 Testing



## Objectives

- Develop SME fluency in R12
- Test modules (apply patches and retest where necessary) and custom enhancements within R12
- Identify post-upgrade steps (setups, data fixes, custom enhancement migration)

## IT Lead Activities

- Facilitate / support user testing
- Issue resolution
- Work Service Requests with Oracle Support
- Patch testing / management

## SME Activities

- Module testing
- Custom Enhancements testing
- Issue identification / logging; iterative testing

- ***Follow and update your test plans***
- ***Schedule custom object modifications so those objects central to testing business processes (e.g., interfaces, workflow) are ready before those more ancillary or back-end (e.g., management reports)***
- ***Plan for some hand-holding for users during this phase***

# Round 2 Testing



## Objectives

- Verify technical upgrade steps, patch migration, post-upgrade steps (valid, repeatable)
- Continue testing modules
- Integration testing (end-to-end between modules, integration with other systems)

## IT Lead Activities

- Facilitate / support user testing
- Issue resolution
- Work Service Requests with Oracle Support
- Patch testing / management

## SME Activities

- Module testing
- Custom enhancements testing
- Integration testing
- Issue identification / logging; iterative testing

- ***Start tracking upgrade timing***
- ***Document test results in accordance with internal procedures and/or audit requirements***

# Round 3 Testing



## Objectives

- Verify technical upgrade steps, patch migration, post-upgrade steps (valid, repeatable)
- Final testing
- Prepare for user training

## IT Lead Activities

- Facilitate / support user testing
- Issue resolution
- Work Service Requests with Oracle Support
- Facilitate user training development

## SME Activities

- Final testing
- Identify user training requirements
- Develop training strategies, training materials where applicable

- ***Validate upgrade timing***
- ***Document test results in accordance with internal procedures and/or audit requirements***
- ***Migration from testing focus to training focus***
- ***This should be getting boring (the testing, hopefully not the presentation)***

# Supplemental Testing



- Understand your audit requirements upfront, may be necessary to perform Segregation of Duties validation and testing
- Consider additional iterations to test specific issues or test/improve performance
- Consider a Mock Conversion event immediately preceding Cutover specifically to practice timing

- ***DBAs may choose to practice/test upgrade iterations of their own that are never released to functional teams***
- ***Mock Conversion does not have to be 24x7 to be effective***

# Project Tracking



## Using Microsoft Project

- Good for tracking milestones, key dates, dependencies
- Limitations due to part-time resource loading, unknowns, and availability/familiarity of Project by project members
- Multiple versions of Microsoft Project can be a problem



## Using Excel

- Good for tracking Issue metrics
- Good for tracking test plan metrics

***Typically use Project for more upfront planning,  
Excel for more progress tracking***

# Issue Tracking



- Provide a tool from Day One to log issues (Excel ok, SharePoint better)
- Provide clear instructions for SMEs on how to capture and store supporting detail (i.e., screen shots)
- Assign a Priority to each issue
- PMO or PM Resource manages the log
- Assign an IT Resource as the Owner for each issue

- ***The Issue Log will be one of the best tools to track and report project status***
- ***Set expectation early you will have open issues at go-live***

# Issue Tracking - Priorities

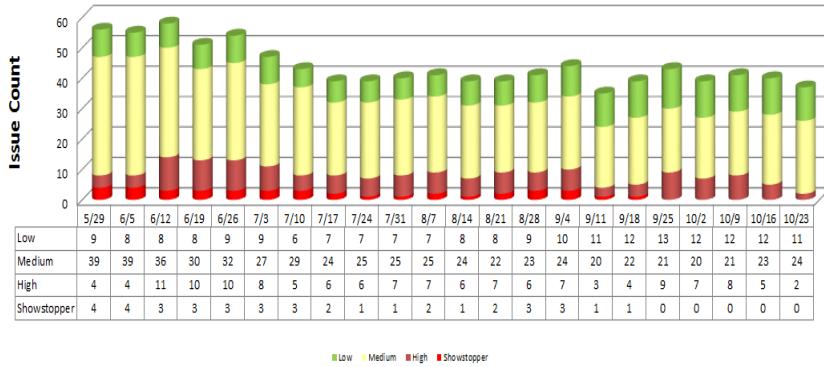


Priority	Criteria
<b>Showstopper</b>	<ul style="list-style-type: none"><li>• We can't go-live with this issue<ul style="list-style-type: none"><li>◦ It would be appropriate to postpone the project</li><li>◦ Willing to support this argument to Executive Management</li></ul></li><li>• No workaround is available</li><li>• Should be reserved for extreme cases</li><li>• IT resources should drop other work in process to address</li></ul>
<b>High</b>	<ul style="list-style-type: none"><li>• Impacts a critical and/or frequent business process (daily, weekly, monthly; not a "blue moon" process)</li><li>• A workaround may be possible or exists, but is painful:<ul style="list-style-type: none"><li>◦ Time-consuming</li><li>◦ Workaround may require additional people until resolved</li><li>◦ Potentially delays critical processes (Booking orders, Manufacturing, Billing)</li></ul></li></ul>
<b>Medium</b>	<ul style="list-style-type: none"><li>• Impacts a critical and/or frequent business process (daily, weekly, monthly; not a "blue moon" process)</li><li>• A reasonable workaround may be possible or exists</li><li>• Process works as desired in Production today</li></ul>
<b>Low</b>	<ul style="list-style-type: none"><li>• Process does not work as desired in Production today<ul style="list-style-type: none"><li>- or -</li></ul></li><li>• Nice to have</li><li>• Understand and agree may not get worked or resolved before go-live</li></ul>

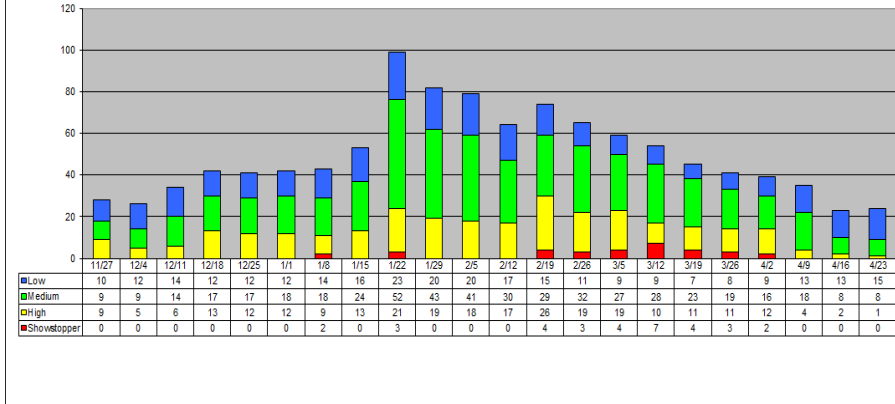
# Issue Statistics



Open Issues - Weekly Tracker



R12 Open Issues



	Utility	Manufacturing
Total Issues Logged	281	327
Total Issues Logged by Priority		
Showstopper	12	17
High	45	89
Medium	185	156
Low	39	65
Open at Go-Live	37	23
AP/Payments Issues	45, or ~1 in every 6	41, or ~1 in every 8

# Patch Tracking



- Track patches requested, applied by environment, in Excel or SharePoint
- Track Request Dates and Applied Dates
- Track pre-requisite patches
- Track SR number
- Track good (go forward) and bad (did not solve the problem, and/or broke something else)

- ***Require supporting Oracle SR number***
- ***Set patch freeze date***
- ***Moving up to the next dot release may not be a bad thing***

# Patch Statistics



	Utility	Manufacturing
Total Patches Applied	81	52
Total Patches by Module		
AP, Payments	31	9
Tax	0	8
GL	7	1
AR	4	4

# R12 Cookbook



- Provide tool on Day One to track all pre-upgrade and post-upgrade steps to be performed by IT Analysts or SMEs
  - Include business process steps to transfer journals to GL and post, run other interfaces
  - Capture sufficient detail to ensure methodical, repeatable steps, can be transferred if necessary
  - Track times per iteration
- ***Can be seeded with known steps based on experience from past upgrades***
  - ***Consider step to de-activate, re-activate users***

# R12 Cookbook - Examples



	A	B	C	D	F	G	H	I	J
1	Application Release R12 Upgrade								
2									ACCESS NEEDED
3	Step	Module	Issue x	Task	Notes	Supporting Documentation or Reference	IT Project Team Owner	Task Owner	Applications Responsibility
4	Section 3 - Post Upgrade Steps								
47	Module-specific application setups including folder changes								
48		ALL		Create MOAC profile. This step also creates a new INTG Moac profile. Run security list maintenance for All Global Security Profiles after all MO profiles are loaded.		See JPM POST STEPS.xls , items 59 and 5	Jim	Jim	HR Manager
49		AP		Run 4 SQL scripts that will set all supplier flags properly for AP Use Tax settings.	Scripts were provided as part of SR 3-1455612231	See JPM POST STEPS.xls step 47	Jim	Brian	
50		GL		Create a new GL category called Accrual Write Off and assign it to the accounting event for Accrual Write Offs in AP. Jim has details.		See JPM POST STEPS.xls step 48	Jim	Brian	General Ledger Superuser
51		CST		Run the SLA upgrade program to ensure all data was put in SLA.		see data Fix Steps.doc - Jim emailed to Tim	Jim	Tim	System Administrator General Ledger Superuser
52		AP		Select in the Write Off Accrual Accounts		See JPM POST STEPS.xls step 49	Jim	Jim	Payables Manager
53		AP		Set up AP Use Tax Codes	This task can continue to be done after we let users in.	Jim has the document	Jim	Darna	Tax Administrator
54		QM	323	Set the country defaults for the united states. This is needed for Sumesh's web adicm order upload.		<a href="#">R12 Issue details 323 - WebADI (Sales Order Upload Template) Country code default setup.docx</a>	Brian	Brian	Tax Administrator
				Oracle says that before any modules can use "Create Accounting", the program called Validate Application Accounting Definitions must be run for the following applications: - Projects - Payables					

- Migrate new versions of custom objects
- Set Profile Options
- Module-specific setups (e.g., MOAC setups, SLA)

# Project Status Reporting



- Track and report the Issues Log
- Track and report status against Test Plans after the Bug Hunt phase
- Red-Yellow-Green status

Project Status Report			
Project:	Oracle ERP R12 Upgrade	Project Manager:	Joe Riley
Project Sponsor:	xxxxx	Date Prepared:	9/3/09
Date Prepared:	9/3/09	Period Ending:	9/4/09

Schedule	Budget	Resources	Delivery
○○○○○●	○○○○○●	○○○○○●	○○○○○●

**Schedule**

**Tasks**

- Round 1 critical errors testing is complete.
- Per guidance from Oracle Support, in order to partially resolve issue #733 related to subledger accounting (see Attachment 3, Issues Tracking for more information), we applied two "pre-upgrade" patches. To effectively test these patches, we had to rebuild the Round 1 "T" environment. This work impacted our schedules for Round 1 Technical testing and Round 1 User testing. Please see Attachment 1 for the revised schedule. The new schedule will also be posted to the team site.
- Revised Technical integration test. Please see Attachment 2, RND1 "T" integration test status.

**High-Severity Issues**

- Under a very specific scenario, a payment batch will create a payment for a supplier with whom we have a credit balance.
- R12 date conversion issue for certain, older Accounts Payable transactions.
- Accounts Payable sample checks failed acceptance test by JP Morgan.
- Oracle Projects burden summation error.
- For more information please see Attachment 1 - Issue Tracking

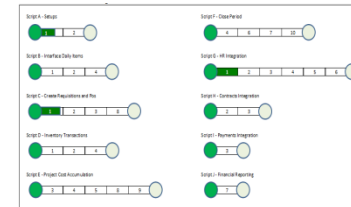
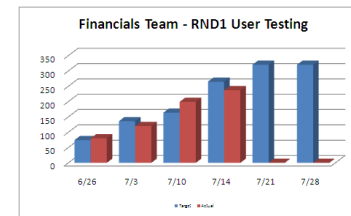
**LEGEND**

**Schedule (as measured against the original implementation schedule or an approved revision)**

- One or more tasks on the critical path are behind schedule; recovery is impossible. The implementation plan must be changed.
- One or more tasks on the critical path are behind schedule, it may be possible to develop a recovery plan, but one does not yet exist.
- A known issue or risk poses a threat to one or more tasks on the critical path; a mitigation plan has not yet been developed.
- One or more tasks on the critical path are behind schedule, but a recovery plan exists to avoid impacting the scheduled completion date.
- Greater than 10% of tasks not on the critical path are behind schedule, but there is no anticipated impact on the critical path.
- A known issue or risk poses a threat to one or more tasks on the critical path, but a mitigation plan exists to prevent an impact.
- All tasks on the critical path are on or ahead of schedule according to implementation plan, and at least 90% of tasks not on the critical path are on or ahead of schedule.

**Budget (as measured against the original project budget or an approved revision)**

- The project is currently over budget against the current plan; recovery is not possible. The overrun is projected to >= 10% of the budget.
- The project is currently over budget against the current plan; recovery is not possible. The overrun is projected to <= 10% of the budget.
- The project is currently over budget against the current plan; recovery may be possible but is not yet known.
- A known issue or risk poses a threat to the budget; a mitigation plan has not yet been developed.
- The project is currently over budget against the current plan, but is expected to recover and finish on or under budget.
- A known issue or risk poses a threat to the budget, but a mitigation plan exists to avoid budget impact.
- The project is currently on or under budget and is projected to finish on or under budget.



- **Highlight Showstopper issues**
- **Set weekly targets with your SMEs for testing, based on their schedules and availability – push for weekly progress**

# Cutover Plan



- Develop a Cutover Task Plan, Schedule
- Assess downtime impact on interfaces
- Develop a Cutover Communication Plan, Schedule
- Develop a Fallback Plan, procedures for invoking this Plan
- Share your plan with Oracle Support
- Establish procedures for Go / No-Go decision after User Verification

- ***May be necessary to negotiate downtime with the business***
- ***Consider how Oracle downtime impacts other systems interfaced with Oracle***

# Cutover Plan - Example



Oracle R12 Upgrade											
Step	Traffic Cop	Task	Coordination	Estimated Start Time	Estimated Run Time	Estimated Completion Time	Current Status	Actual Start Time	Actual Run Time	Actual Completion Time	E-mail update to IT
1	Mary	E-mail reminder that Oracle is going down		4/15/10 4:30 PM	00:05	4/15/10 4:35 PM	DONE	4/15/10 4:30 PM	00:00	4/15/10 4:30 PM	Yes
2	Carole	Oracle 11i unavailable	Carole will de-activate most users	4/15/10 5:00 PM	00:00	4/15/10 5:00 PM	DONE	4/15/10 5:00 PM	00:15	4/15/10 5:15 PM	
3	Darma	Process final Accounting batch processes	Jim and Darma will facilitate with Tony	4/15/10 5:00 PM	01:00	4/15/10 6:00 PM	DONE	4/15/10 5:10 PM	00:55	4/15/10 6:05 PM	
4	Barbara	Run control reports for post-upgrade validation	IT will run the control reports	4/15/10 6:00 PM	01:00	4/15/10 7:00 PM	DONE	4/15/10 6:06 PM	00:28	4/15/10 6:34 PM	
5	Barbara	Put all concurrent requests on hold	Barbara run script	4/15/10 7:00 PM	00:00	4/15/10 7:00 PM	DONE	4/15/10 5:45 PM	00:05	4/15/10 5:50 PM	
6	Barbara	Backup 11i (for fallback)	This is the gold backup, would be used in fallback plan	4/15/10 7:00 PM	00:30	4/15/10 7:30 PM	DONE	4/15/10 6:34 PM	00:41	4/15/10 7:15 PM	Yes
7	Kalpesh	Cancel all concurrent requests (most on hold)		4/15/10 7:30 PM	00:00	4/15/10 7:30 PM	DONE	4/15/10 7:15 PM	00:00	4/15/10 7:15 PM	
8	Kalpesh	Switch to new Oracle Home		4/15/10 7:30 PM	00:15	4/15/10 7:45 PM	DONE	4/15/10 7:15 PM	00:15	4/15/10 7:30 PM	
9	Kalpesh	Technical tasks (before shutdown tasks)		4/15/10 7:45 PM	00:30	4/15/10 8:15 PM	DONE	4/15/10 7:30 PM	00:30	4/15/10 8:00 PM	
10	Kalpesh	Technical tasks (downtime starts tasks)		4/15/10 8:15 PM	03:45	4/16/10 12:00 AM	DONE	4/15/10 8:00 PM	02:43	4/15/10 10:43 PM	
11	Kalpesh	Technical tasks (pre-update tasks)		4/16/10 12:00 AM	02:30	4/16/10 2:30 AM	DONE	4/15/10 10:43 PM	01:30	4/16/10 12:13 AM	Yes
12	Kalpesh	Install/patch to R12.1.1		4/16/10 2:30 AM	14:00	4/16/10 4:30 PM	DONE	4/16/10 12:13 AM	12:02	4/16/10 12:15 PM	Yes
13	Kalpesh	Technical tasks (R12.1.1 post-steps tasks)		4/16/10 4:30 PM	02:45	4/16/10 7:15 PM	DONE	4/16/10 12:15 PM	04:07	4/16/10 4:22 PM	
14	Kalpesh	Technical tasks (HR Global patches tasks)		4/16/10 7:15 PM	02:30	4/16/10 9:45 PM	DONE	4/16/10 4:22 PM	01:57	4/16/10 6:19 PM	Yes
15	Kalpesh	Patch to R12.1.2		4/16/10 9:45 PM	10:00	4/17/10 7:45 AM	DONE	4/16/10 6:19 PM	09:24	4/17/10 3:43 AM	Yes
16	Kalpesh	Technical tasks (R12.1.2 post-steps tasks)		4/17/10 7:45 AM	02:15	4/17/10 10:00 AM	DONE	4/17/10 3:43 AM	03:38	4/17/10 7:21 AM	
17	Kalpesh	Technical tasks (post upgrade tasks)		4/17/10 10:00 AM	12:00	4/17/10 10:00 PM	DONE	4/17/10 7:21 AM	15:54	4/17/10 11:15 PM	Yes
18	Kalpesh	Backup R12		4/17/10 10:00 PM	00:30	4/17/10 10:30 PM	DONE	4/17/10 11:15 PM	00:39	4/17/10 11:54 PM	Yes
19	Kalpesh	Apply post-upgrade hot patches (on-line help, etc.)		4/17/10 10:30 PM	02:00	4/18/10 12:30 AM	DONE				
20	Barbara	Cookbook steps (setups, code migration)		4/17/10 10:30 PM	05:30	4/18/10 4:00 AM	DONE	4/17/10 11:54 PM			Yes
21	Barbara	Run control reports, perform verification	this should take longer than running them the first time, and we should verify them before we let users in	4/18/10 4:00 AM	02:00	4/18/10 6:00 AM	DONE				Yes
22	Barbara	Applications User Verification	Allow 3 hours	4/18/10 10:00 AM	03:00	4/18/10 1:00 PM	DONE	4/18/10 10:30 AM	02:30	4/18/10 1:00 PM	
23	Jon	Go / No-Go Checkpoint Meeting		4/18/10 1:00 PM	00:30	4/18/10 1:30 PM	DONE	4/18/10 1:05 PM	00:20	4/18/10 1:25 PM	Yes
23b	Fred	IT Steering Committee - Tie Breaker		4/18/10 2:00 PM			N/A	N/A	N/A	N/A	
24	Mary	Reschedule concurrent requests	Estimate 3 hours, this may change depending on what time we get started (might allow more time)	4/18/10 1:30 PM	03:00	4/18/10 4:30 PM	IN PROCESS	4/18/10 1:30 PM			
25	Barbara	Run Gather Stats		4/18/10 1:30 PM	12:00	4/19/10 1:30 AM	DONE	4/18/10 12:50 AM	05:30	4/18/10 6:20 AM	Yes
26	Barbara	Backup R12		4/19/10 1:30 AM	00:30	4/19/10 2:00 AM	DONE				Yes
27	Mary	E-mail announcement, Welcome to R12!		4/19/10 5:45 AM	00:00	4/19/10 5:45 AM	DONE	4/18/10 6:05 AM	00:00	4/18/10 6:05 AM	Yes

# Cutover Communication Plan - Example



Communication Schedule

#	Status	Trigger	Date / Time (all times are EST)	Message	Sender	All Users	IT	SME	SC
1	Sent	Scheduled	Fri,3/26 10:00am	Announcement, Oracle downtime begins at 5:00pm on 4/15. This is the first mass announcement.	Mary	X			
2	Sent	Scheduled	Wed,4/7 4:00pm	Reminder, Oracle downtime begins at 5:00pm on 4/15. Send after BPO go/no-go meeting on 4/15 at 2:30 PM.	Mary	X			
3	Sent	Scheduled	Mon,4/12 7:30am	First of three daily countdown reminders that downtime begins at 5:00 PM on 4/15.	Mary	X			
4	Sent	Scheduled	Wed,4/14 7:30am	Second of three daily countdown reminders that downtime begins at 5:00 PM on 4/15.	Mary	X			
5	Sent	Scheduled	Thu,4/15 7:30am	Third of three daily countdown reminders that downtime begins at 5:00 PM on 4/15.	Mary	X			
6	Sent	Scheduled	Thu,4/15 4:30pm	Final reminder that downtime begins at 5:00 PM.	Mary	X			
7	Sent	Milestone	Thu,4/15 7:00pm	Final Accounting processes and control reports complete. 5 of 22 steps completed. We are hh:mm ahead/behind schedule. Send copy to Kalpesh, we are ready for backup.	Barbara		X		
8	Sent	Milestone	Thu,4/15 7:30pm	Gold backup complete. 6 of 22 steps completed. We are hh:mm ahead/behind schedule.	Barbara		X		
9	Sent	Scheduled	Fri,4/16 6:00am	Reminder, Oracle downtime is in process, expected return is Monday,4/19 at 6:00 AM.	Mary	X			
10	Sent	Scheduled	Fri,4/16 7:00am	Scheduled update to IT (should reach milestone at 2:30am) 11 of 22 steps completed. We are hh:mm ahead/behind schedule.	Barbara		X		
11	Sent	Scheduled	Fri,4/16 3:00pm	General announcement with status update, either on schedule or if behind by how much.	Barbara		X	X	
12	Sent	Milestone	Fri,4/16 4:30pm	Patching to 12.1.1 completed. 12 of 22 steps completed. We are hh:mm ahead/behind schedule.	Barbara		X		X

- **Mix of scheduled and milestone communications**
- **Approve this plan in advance so stakeholders know when to expect to receive an update**

# User Verification, Go / No-Go



- Typically a Sunday afternoon event
- Timebox, consider allowing 1-2 hours
- Provide expected time, users must provide alternates if they can't be available
- Include Control Reports
- Communicate results by e-mail
- Schedule conference call for Go / No-Go decision, and escalation path if recommendation is No-Go

- ***Users responsible for verification should receive status updates throughout the weekend***
- ***Plan contingencies for being ahead or behind schedule***

# Cutover Statistics



	Utility	Manufacturing
User outage began	Thursday, 6:00pm	Thursday, 5:00pm
Downtime began (after gold backup)	Friday, 2:00am	Thursday, 7:30pm
Downtime complete, ready for backup	Sunday, 7:00am	Sunday, 12:00am
Total downtime	56 hours	53 hours
Cookbook steps complete, User verification began	Sunday, 7:00pm (Discoverer/Noetix upgrade 10 hours)	Sunday, 10:30am
Go decision	Sunday, 9:30pm	Sunday, 1:00pm

- ***Build-in some contingency time***
- ***24x7, All-hands-on-deck mentality***
- ***Make plans to feed your team!***

# Closeout



- Move issues from the project issues log to the Production Support issues log
- Seek feedback for PMO, PM
- Provide feedback to team members
- If possible, plan and provide some comp time

- ***Plan for post go-live support***
- ***Plan for lag time between the R12 go-live and your next Oracle project***

# Q & A

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