

Oracle E-Business Suite Release 12 Upgrade

...Sharing the experience

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SYSTEM

Background

- Beaumont Health System
- 20,000 employees
- Oracle E-Business Suite is the ERP system
- Supply Chain, Finance and HR modules
- 10,000 hours of IT testing for the R12 upgrade

R12 Upgrade - What

Highlights:

- Defined the scope to minimize the risks
- Production upgrade took place in June 2011 before the June books were closed
- Upgrade took ~3.5 days of production downtime
- EBS modules included AP, FA, Cash Management, GL, Purchasing, iProcurement, Order Management, Inventory, HRMS, OAB, Self Service and also touched ADP/Etime Payroll
- The upgrade was successful with the financial books closing on time and without any issues

Scope

- Initial Scope
 - R12 upgrade
 - Database upgrade
 - Change platform from Unix to Linux
 - Change hardware from HP to Dell
- Final Scope
 - R12 upgrade - Phase 1
 - Database/Linux and Hardware upgrade - Phase 2

Why Upgrade

- Protect business continuity with Oracle Premier Support (Oracle Premier Support for 11i ended Dec 1, 2010)
- At risk for business disruption or work stoppage if something breaks
- Do not qualify for any new updates, patches or fixes from Oracle
- Will not receive any new tax (e.g.1099), legal or regulatory updates
- Current version not compatible with new products such as Windows 7
- Leverage new R12 functionality and business benefits
- Establish a stable environment (R12) for future functionality and business process improvement opportunities

Why Move to Linux

- Existing Oracle EBS Database and App Tiers lack resources to provide satisfactory performance for users
- New EBS servers will improve the user experience with the addition of more and faster CPUs and Memory
- New EBS servers will become part of the VM environment thus providing a highly available integrated Oracle E-Business Suite application
- The VM farm is critical to further VM deployment and alternate data center plans
- Substantial cost savings in the short term and long term
- Consistent approach to existing infrastructure and in line with our vision and strategy
- Approved and blessed by the senior leadership

- Biggest impact of not migrating to Linux:
 - » Current HP-UX platform cannot fully deploy VMware or realize its benefits
 - » New R12 design and architecture has added complications to the existing HP-UX platform

How

- Obtained top leadership sponsorship and support
- Methodical approach to implementation
- Engaged the customers very early on
- Captured and verified business requirements and workflows
- Captured R12 benefits and pain point resolutions
- Converted business process flows into detailed test scripts
- Worked with user groups to package test scripts into a comprehensive User Acceptance Test (UAT) plan
- Secured formal business sign-off on the UAT plan prior to the start of the UAT
- Secured formal business sign-off on the UAT results at the conclusion of the UAT

How (cont.)

- Developed a detailed project plan with buy in from all stakeholders
- Joined at the hip with the DBA
- Defined overall reporting strategy
- Increased customer awareness of the Noetix/Webi tool for ad-hoc reporting and analysis
- Established weekly team and stakeholder meetings by module
- Rolled out an extensive communication plan
- Created and deployed computer-based training modules for major functionality changes
- User confidence was a key component of overall project success

Where

- The whole operation was implemented in house with existing resources and infrastructure
- Oracle R12 is more web-based and we were advised to focus more attention on JVMs and web tier components
- Oracle R12 application tier tuning therefore becomes more important to maintain system performance
- The Infrastructure team conducted a thorough analysis of the hardware to fine tune it and improve CPU efficiencies
- The team modified the infrastructure configuration to add more muscle to the web tier components

Who

- Core IT team consisted of 8 application analysts and 1 DBA
- Extended IT support from Infrastructure, Web, Interface, Reporting and Training & Education teams
- Oracle Consultant on site for testing and Go Live
- Project champion for each module at the VP level (Finance, Supply Chain and HR)

When

- Go Live was June 20th for Phase 1
- Go Live was Sept 19th for Phase 2

Finance Modules - Lessons Learned

- Testing...testing...testing
- Parallel testing is a must to uncover all issues...reconcile to the last penny
- Fixed Assets and Accounts Payable were the most affected
- Beware of issues with data conversion
- Many patches both pre and post upgrade were applied
- Evaluate both seeded reports and custom reports
- Discoverer tool and ADI no longer available in R12
- Training and testing go hand in hand

Supply Chain Modules - Lessons Learned

- Multiple favorite lists and enhanced inquiry was a big hit
- PO accrual process changed
- Supplier add and location codes moved to web based forms
- EDI process needs to be tested thoroughly and always do a dry run before the final production file
- Automated receiving changed and needs to be thoroughly tested

HR Modules – Lessons Learned

- No major changes other than look and feel
- New salary screen was a big hit
- Payroll parallel test was completed successfully using production files
- Benefits....tested over 5,000 life event combinations
- HR ADE no longer available in R12

Open Forum...Panel Discussion

- Beaumont IT team