

Atlanta OAUG

Tips and Techniques

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Editor's Comments

We had some nice comments about our first issue. Thanks for your support.



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OAUG

Make hotel reservations early for the next OAUG conference. In September 1997, I could not get into my first choice hotel for the May 1998 conference in San Diego.

Orlando Conference

The announced attendance at the Orlando conference was 6900.

From Melanie Bock's opening comments to the Orlando OAUG conference...

- The number one issue for Oracle Apps Customers is support and product quality.
- The next scheduled sessions of the OAUG are...
 - 05/17-20/1998 in San Diego
 - 10/25-29/1998 in Honolulu
 - 04/18-21/1998 in San Diego
- Oracle will support Character R10.7 through 12/31/2000
- Chat rooms for SIGs are coming to the Internet.

Ask Oracle in Orlando

Q Should a R10.5 customer wait for the Web release to do an upgrade?

A Ron Wohl suggests there are three user interfaces planned for R10.7. CHUI is intended for backward compatibility. The code set is the same between SmartClient and WEB. So, go ahead and get SC, learn screens, customize and train. Timing and availability of WEB applications will control the decision. Consider using Cytrix as a bridge if the timing and availability are not right.

Release 11

From Ron Wohl's comments at the Orlando OAUG conference...

- Release 11 is Oracle's "most significant release."
- Mr. Wohl discussed two key themes for R11; managing complexity and lower costs
- **Complexity** - R11 has upgrades to manage complexity in an increasingly complex world. Globalization is supported with better language, currency and financial close support. The networked supply chain is supported via order, planning, sourcing, manufacturing,

and fulfillment. Workflow will ship with 700 pre-defined activities.

- **Lower costs** - R11 provides self service web applications for the occasional user. There are 20+ new flows (web storefront is an example). Implementation costs should be lowered by using a workflow enabled wizard to guide set up and document progress.
- R11 will be available in English 1Q98
- R11 will require WIN95 or NT on the desktop.
- Installed customers should migrate to R10.7 before December 1998.
- Oracle will support Character mode R10.7 through 12/31/2000. R11 will be GUI only.



John Wookey, Oracle's Product Line Manager for Financial Applications, commented at OAUG the release of R11 is time sensitive to support the Euro currency developments in Europe. Mr. Wookey indicated the R11 production ship date (1Q98) had to be firm because Oracle Services would need 9 months to stabilize the product in the field, and it had to be stable by 1/1/1999. Mr. Wookey can be reached at jwookey@us.oracle.com.

Editorial

From: Jim Crum of BOSS Corporation
jcrum@sprynet.com

Since this is only edition two of the news letter and everything is still taking form, I thought I would try an editorial with a tip or two embedded within. Perhaps we can generate some opinions, letters to the editor, and contributions to Tips and Techniques (hint, hint).

2 Techniques

Now is the time of year when many businesses are preparing calendar 1998 budgets, and the industry press has been writing a lot about Total Cost of Ownership. As I look over the content of the news letter for October, there is a recurring theme about budgets and costs. See Ron Wohl's comments on R11, Brenda Carlton's article on budgets, and the database administration notes on increased SGA and disk space.

There are at least two approaches companies take concerning funding of information technology. The first type does a major project once or twice a decade and replaces or rewrites everything on a specially funded capital authorization. Between projects, the type one company goes to sleep and skips a generation or two of technology. The second type of organization invests smaller amounts in IT continuously each year. In type two companies, the IT budget is constructed of incremental projects and updating technology is a way of life.

I have worked for both types of companies and the relative merits of each IT investment strategy is not the subject of this article. However, after being an Oracle customer, employee, and business partner for over 11 years, I can offer the following tips.

Oracle is a leading edge technology company, and that is what we like about them. For their own business purposes, Oracle is always pushing to build improvements into the product, and that gives us an opportunity to advance our own business processes and capabilities. However, having a leading edge supplier like Oracle has considerations for Total Cost of Ownership and accurate budgeting.

We believe the type one company usually has the most difficult time being an Oracle customer. First tip: the expenses don't stop after your implementation project is done and the annual support bill is paid. Second tip: Oracle doesn't get all the money. The type one company absorbed variances during implementation by rationalizing that they were "one time and not foreseen", but how does a type one company budget for an upgrade from R10.5 to R10.7? We have seen some companies believe the major cost of an upgrade is covered by support so it must have little budgetary impact. They are surprised and upset when they find the need more server side disk and memory, fat clients, 17" monitors, and a consultant to get through AutoInstall. Imagine explaining those budget items to the shocked and unhappy management of the type one company who already spent most of a decade's budget on implementing R10.5 just two years ago. It's enough to make you go into consulting.

The type two company doesn't have the leading edge vendor problem solved either. Third tip: this is technology and there are hidden costs. At the ask Oracle session in Orlando, this editor asked "Since R11 will ship before the next conference, what kind of budgetary impact should we plan for with the release of R11? Although, web clients may get thinner and cheaper, what should we plan for on the server and network side of the operation?" The response from Oracle started awkwardly, but they partially recovered. The answer is, they don't know, and they will work through the OAUG to get the word out as soon as possible. Karen Gilbert of the enhancements committee offered OAUG help.

In conclusion, although the reasons are different, both type one and type two organizations have budgetary uncertainty because of their association with Oracle as a leading edge supplier. That's not a bad thing because there may be offsetting benefits. But, the novice Oracle customer should determine their organization type, get educated, and create contingencies accordingly.

Support

Support has a new area code. The phone number is now (650) 506-1500.



I just finished reading the latest edition of SupportNews. This news letter is edited by Michael Kure and is published quarterly. The Fourth Quarter 1997 edition was 18 pages and had a lot of content about changes at Oracle Support. Interesting articles in this issue include: Expanded Support Options, Product Fixes via Patch Sets, Help from Virtual Support Analyst, Net8 Quick Reference Card, Ultimate Database Troubleshooting Guide, New Content and Features to be added to Oracle *MetaLink*. Check out the electronic version at www.oracle.com/support.



VSA stands for Virtual Support Analyst and uses an e-mail interface to contact support. It is a little cumbersome to get registered and set up, but it can produce a reasonably complete bug list and allow you to track progress on TAR's off line.



Education

Oracle no longer offers character user interface (CHUI) training in the Oracle Education centers. However, they will offer CHUI education at a customer site. They have a "classroom in a box" server configured to support the education so the instructor will have a familiar platform, and you don't have to burden your computers with a training instance. There is a separate rental fee for the configured server, and on site education generally has a break even if the class size is greater than six.

Best of the Net

If you subscribe to the digest version of ORAAPPS-L, it is a significant breach of net etiquette to echo the entire digest back to the list by using the reply feature of your e-mail program.

GLDI ==>> ADI

From: "Brett Hooker"
<BHOOKER@us.oracle.com>

Q The upload of the journal can be quite slow (this may be due to our network)

A The ADI 2.0 release of GLDI was significantly tuned (especially journals) for use on a network. If you're not on the latest GLDI, then try it out - you should be pleased with the performance gains.

Q A journal template can only be used against the instance and the responsibility used to create that template (there must be a way to edit the excel spreadsheet to change this, but we haven't found out how, yet).

A The ADI 2.0 release of GLDI relaxed this model a little. Now your templates can be used by any responsibility, so long as it's for the same set of books.

ADI 2.0 has been available since February. ADI 2.1 became available on the 1st of August.



System Administration

Michael Barone reports there are some interesting scripts in the \$FND_TOP/sql directory. More in the next news letter.

Upgrades

3 Techniques

If you are in an implementation project now, plan ahead and spend some extra time to carefully document your conference room pilot and test plans in R10.7. Use that documentation as a basis for testing during your upgrade to R11.



There is a new upgrade SIG. Organizers are in the process of setting up a list server for e-mail. Subscription information not yet available.



From the Q&A for the Fall OAUG conference...

In release 10 the significance of the point releases was

- .1=alpha,
- .2=beta,
- .3=controlled release,
- .4+=production.

Release 11 is scheduled for production in English at the end of 1Q98. In R11, Oracle will not use point releases to signify production status. "Customers planning implementations around development schedules are encouraged to contact their Oracle Account Managers."



Release 11 will require Oracle8, Developer 2000 R1.6 and a 32-bit PC operating system. Windows 3.1 will not be supported in any configuration.

There will be no character mode version of R11.

Production releases of Web-deployed 10.7 and Prod 16.1 are planned for 4Q97 on Windows NT. Selected UNIX ports are intended to follow [but are not announced].

The next major release of Oracle GEMMS is 4.1 and that is scheduled for the end of September 1997. GEMMS 4.1 is certified year 2000 compliant.

Fin Apps

AR

Christine McCabe of the New Millennium Group advises "don't take any wooden nickels." [may be an unsupported currency in R10.7 AR - ed.]

AP

BUDGETING PROCESS USING ADI

/ Navigate Setup Financials Calendar Periods
Open periods, quarters, year for the new year

/ Navigate Budget Define Organization
Create a new organization, if necessary

/ Navigate Budget Define Budget

I use a new budget for each year i.e. "97final", "98prelim", etc. Once you complete the budgeting process, the name can be changed to "98final".

1) A.D.I. Budget wizard - download current year " budgets and actuals". All flexfield combinations can be downloaded at once or you can "limit organization accounts" and download multiple times according to the manager or organization responsible for a particular piece of the budgeting process.

2) A.D.I. Budget wizard - download "budgets only" for the new budget defined above. This will give you a blank worksheet in a format which can be uploaded into your new budget. Paste this file into the excel workbook created in step # 1.

3) E-mail the excel workbook to the appropriate managers responsible for writing the new budget. Provide detailed directions on how to complete and insert/paste new flexfield combinations. I would recommend "protecting" the flexfield columns.

4) FSG - Write a column set which will compare ytd actual, forecasted current year actual (use a formula i.e. 12/9's of ytd actual if in Sept), current year budget and next year budget (will be blank until after your first upload of the new budget). Write a report using this column set with existing row sets to provide managers with a familiar report to analyze their budget. For example, if budgeting is done at a cost center level, provide the report to the managers of each cost center.

5) Create new values (accounts, departments, etc.) requested by managers.

/ Navigate Setup Financials Flexfield Validation Value - to create new values in each of your segments.

/ Navigate Setup Account Combinations - to create combinations if not using dynamic insertion.

6) / Navigate Report Request Standard - run Program - Maintain Budget Organization to activate your new combinations in the applicable budget organization.

7) A.D.I. Budget wizard - upload each manager's budget received via e-mail. Errors and invalid combinations can only be deleted by your DBA.

8) FSG - Re-issue your FSG report prepared in step #4 for manager's analytical review of new budget compared to current year actual/budget.

9) Start over again from step #5 for each budget revision!

From Deidre Figueroa (Mgr. of Oracle Support for AP in Orlando)...

AP doesn't use import Descriptive Flexfield information in its GL interface. Development is scheduled for R12.

The Unposted Invoices Sweep report in report mode is the fastest way to check on problems balancing the AP ==>> GL interface.

If you want to post AP in detail, you must turn audit on to get it. "Audit is one of the most misunderstood areas of AP."

A final close on an AP period is really final and is not really recommended (until perhaps after a year end audit).

When the GL Journal Import doesn't select data in GUI, check the encumbrance radio button set ups (say yes, save, then say no, and save). These values may be seeded as

null and unless the set up initializes these values, no data is selected.

Oracle support has the ability to completely rebuild an AP trial balance position from the base transactions

Q We are planning on purging our Oracle Applications Payables and Purchasing....

From: "Jones, Randy"
<Randy.Jones@HBC.honeywell.com>

A Depending on your installation, you may not find a lot to purge. Here are just a couple of items to keep in mind:

- If any of the invoices deal with 1099's, they won't purge.
- If they are related to Oracle Projects, they will not purge.
- If you haven't cleared the check that paid the invoice, you won't purge.
- If your PO's are not "CLOSED" or "FINALLY CLOSED" you won't purge..

FA

Q << I am told by our consultants that Oracle Assets can only close once per period. >>

From: Melanie Bock
melanie_bock@compuserve.com

A This is true. Ability to rerun depreciation has been high on enhancement list of a LONG time. You can run Projection, but be aware it does not match actual (which is another long standing popular enhancement request)

Distribution Apps

PO

Q Has anyone else implemented 10.7 PO/AP/Projects modules in GUI using accrue upon receipt? When Projects pulls AP invoices that have been created from a purchase order, there is an error.

From: Melanie Bock
melanie_bock@compuserve.com

A The short answer that I am sure you do not want to hear is that it is generally not advisable to accrue on receipt.

INV

From: jparrish <jparrish@metronet.com>

We have extensively modified mtl_system_items. My advice to you is DON'T! We are now working on removing those modifications. It is difficult and expensive. The problem is that whenever you upgrade (or potentially patch) your modifications will either cause AutoInstall to abend or will be eliminated and you are left to re-re-re-modify the table. It is much easier to create another table which also contains inventory_item_id as its key.

OE

Q We are on 10.7SC. I thought I once remembered being able to cancel a picking line that had been generated from a pick release. Is this feasible or not and if not how are other companies working around this problem? We have situations where customers call and wish to cancel their order after the pick release has occurred, but prior to ship confirm. I realize that after ship confirm RMAs are the only vehicle to do this.

From: ANIL.TATA@bge.com

Support in Orlando. The following is the best process to escalate a support issue.

A

Support Escalation Procedures

Level 1: Between the customer Project Team Member and the Support Analyst

- Negotiate the severity level with supporting business justification
- Request TAR reassignment, callback, or status of issues
- Request to speak to a Duty Manager (level 2)

Level 2: Between the customer Project Team Member and the Duty Manager
The analyst will

- Update the escalation level field on the TAR to Duty Manager
- The status of the TAR is set to "Immediate Response Required."
- Enter Duty Manager contact information on the TAR
- Page or personally hand off the TAR to the Duty Manager.

The Duty Manager will

- Call the customer within 30 minutes
- Determine with the customer an acceptable action plan
- Document the conversation and the plan in the TAR log
- Follow up to insure the plan is followed and/or reset the customer's expectations.

Level 3: Between the customer Project Team Lead and the Support Product Manager

If the level 1 and level 2 escalation processes fail, then the customer Project Team Lead may call and escalate their issues to the Support Product Manager. These two will discuss and agree on an action plan to move the issue forward. [Note: Harmohan Suri is a Product Manager and may be reached in Orlando at 407-888-1298 - ed.]

Level 4: Between the customer Project Manager and the Applications Support Director

After normal escalation at level 1, 2, and 3, the Customer Project Manager may escalate to the Applications Support Director. In Orlando this is Kurt Larsen (407-888-1202). Kurt may also be reached through Valerie Leclair (407-888-1553).

Level 5: Between the customer CIO and the Support Site Director

If this level is needed, it will be set up by the Applications Support Director.

One way to do this is to ship confirm this picking line with zero quantity. This would change the status of the order line to backorder. Now you could go ahead and cancel the order line.

MFG Apps

MRP plans by item number but not by engineering revision level. If you have 300 of Rev A and 900 of Rev B in inventory, MRP will show a demand of 600 as satisfied even though a customer wants Rev A only. The work around appears to be to create a new item number if the products are really a different form, fit, and function.



HR/PAY

Ken Conway of MCI Systemhouse suggests...

If you are implementing AP or PO in an early phase of your APPS project and HR or Payroll in a later phase, do the organizational analysis and plan ahead for the overlap among these applications. Recognize that HR has requirements before getting locked in to the AP and PO default organization set ups.

Web Applications

At OAUG in Orlando, Cliff Godwin stated "We [Oracle] are pushing the envelope in Java development." The standard browser may need an upgraded Java to use the AppViewer. Since both Netscape and Sun are Oracle customers, there is good cooperation to make sure Java meets Oracle's needs on those platforms. However, Mr. Godwin doesn't know when Microsoft will be "Java compliant" in its browser.

5 Techniques

Atlanta OAUG Tips and



Ron Wohl polled the audience and found the group was evenly split in the use of Netscape and Microsoft browsers. Wohl suggested the users of the Microsoft product should forcefully communicate their corporate Java needs to Microsoft to participate in a timely web application roll out.



The web applications will first be available on NT in 4Q97. 25 beta sites received their copies in September. Cliff Godwin called this product "an entirely new technology stack." UNIX versions will be available in late 1Q98, and Solaris will be the first platform released.



Therefore, add your browser's version of Java to the certified combination of versions of the Database, Operating System and Applications required for an upgrade.

Data Warehouse

The new APPS data warehouse software is currently in beta and has already formed a Special Interest Group. Find out more at www.oaug.dwhsig.org

Database Administration

From: Gary.Domingos@wj.com (Gary Domingos)

Yes, we run in archive log mode, and you should, too. It is the ONLY way to restore a database up to the point in time of the failure. Your sysadmin will have to manage the archive files, as they will need to be deleted after taping them (a couple of times). One (primary) responsibility of a DBA is to provide security and recoverability of the database, and this requires running in archive log mode.

Do not confuse this with turning on AUDITING (from inside the application). I have no experience with auditing, but expect it may degrade performance depending on the level of auditing, amount of activity, hardware platform, etc. Consider AUDITING optional, ARCHIVELOG MODE mandatory. Refer to the Oracle Press book Oracle Backup And Recovery by Rama Velpuri.



From: Greg.Wunderlich@kellogg.com (Greg Wunderlich)

10.7 generally requires 20% - 30% larger SGA than 10.6 regardless of App.



An unnamed source at Oracle has been quoted with the statistic that an On Line Transaction Processing Database will grow at 30% per year and Oracle has observed this rate consistently for the last 5 years. Many Applications projects run out of space in year two from their initial configuration.



From Craig Shallahammer
cshallah@us.oracle.com

You can tell if a book on Oracle Tuning is good by seeing if it has at least a full chapter on "Session Tuning." Also, pick up some interesting tuning material at www.europa.com/~orapub



Linda Dugan of the HP-Oracle competency Center says "the ratio of [space required for] data to indexes is about 60% / 40%." Therefore, if you expect your data to grow by 600 MB allow an additional 400 MB for indexes.



From Michael Barone a consultant with BOSS Corporation...

The PLATINUM Data Dictionary for Oracle8 poster is now available at <http://www.platinum.com/news/poster.htm> It is a full color poster detailing the Oracle8 data dictionary. You can see it online now, you can download it for later, and/or you can order a free hardcopy to hang on your wall.



The UNIX strings command can be used to look at the SQL code inside a binary report, user exit, or form. Just redirect the output of strings to a file and use an editor to see the complete query or data manipulation language.



Consulting

The IDEFO (Integration Definition) style of process flow modeling says a process may be defined by its Inputs, Outputs, Controls, Methods, and the time sequence of its sub processes. Jim Crum of BOSS Corporation will speak on process modeling at the October 17th (Friday) meeting of the Atlanta OAUG.

Call for Contributions



Now that you have read this news letter, we hope you will write a short note to let us know your favorite tips and techniques. Your ideas and experience are valuable to our readers, and your contributions are very much appreciated. **You** have something to contribute.

It takes a lot of effort to assemble just five pages of news letter. After spending over a day on this one, I can tell you we will need your contributions to make it a long term publication. It takes a lot of work for one person, and we have to divide the load many ways. If you run across something in your daily interaction with the Oracle Applications that makes you think "isn't that clever, strange, well done, impressive, difficult, etc." drop me a note and we will share it with our readers.



Send e-mail to jcrum@sprynet.com or FAX to BOSS Corporation at 770-622-5400. Thanks!