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Release 12 Upgrade - Best Practices and Tasks You Can Do Prior To the Upgrade

BIAS

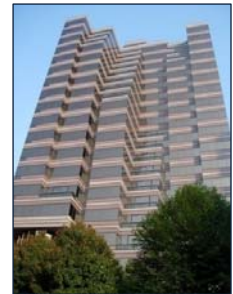


Agenda

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BIAS Corporation

- BIAS is headquartered in Atlanta, GA with 8 years of successful service
- Owned and operated by Oracle implementation and solution architects
- BIAS is known for expertise in
 - Oracle EBS Implementations, Upgrades, Development, & Performance
 - Application Architecture and Performance
 - Business Intelligence, Data Warehouse & Reporting Solutions
 - Fusion Middleware, including the entire SOA Suite
 - Database Technology & Architecture
 - Enterprise and Customer Portals
 - System Integration
 - Upgrades & Migrations – Oracle Applications, DB, Forms & Reports



Introductions

- **John Faucher – VP Oracle Applications BIAS Corp, 18 years working with Oracle Apps, 8 Years at Oracle, Apps Release 8, 9, 10, 11&12; DB Versions 6,7,8,9 &10. Co-Author R12 book.**
- **How many on 10.7?**
- **How many on 11.0?**
- **How many on 11i?**
- **How many currently upgrading to R12?**
- **How many on Release 12?**



Presentation Summary

Given the extended support of 11.5.10 announced by Oracle at Collaborate 08, customers now have an opportunity to plan more effectively for the Release 12 upgrade. The presenter will share information gathered from Oracle, Collaborate 08 and draw on previous experiences to share best practices for a Release 12 Upgrade as well as identify tasks you can do now to make the R12 upgrade process go smoothly and more efficiently.

Lifetime Support Stages

Oracle E-Business Suite Releases

Release	GA Date	Premier Support Ends	Extended Support Ends	Sustaining Support Ends
11.0.3	May 1999	Feb 2007	Not Offered	Jan 2009
11/1	May 2000	Jul 2006	Not Offered	Indefinite
11/2	Oct 2000	Jul 2006	Not Offered	Indefinite
11/3	Jan 2001	Jul 2006	Not Offered	Indefinite
11/4	Jun 2001	Jul 2006	Not Offered	Indefinite
11/5	Sep 2001	Jul 2006	Not Offered	Indefinite
11/6	Jan 2002	Jul 2006	Not Offered	Indefinite
11/7	May 2002	May 2007	Not Offered	Indefinite
11/8	Nov 2002	Nov 2007	Not Offered	Indefinite
11/9	Jun 2003	Jun 2008	Not Offered	Indefinite
11/10	Nov 2004	Nov 2010	Nov 2013	Indefinite
12	Jan 2007	Jan 2012	Jan 2015	Indefinite



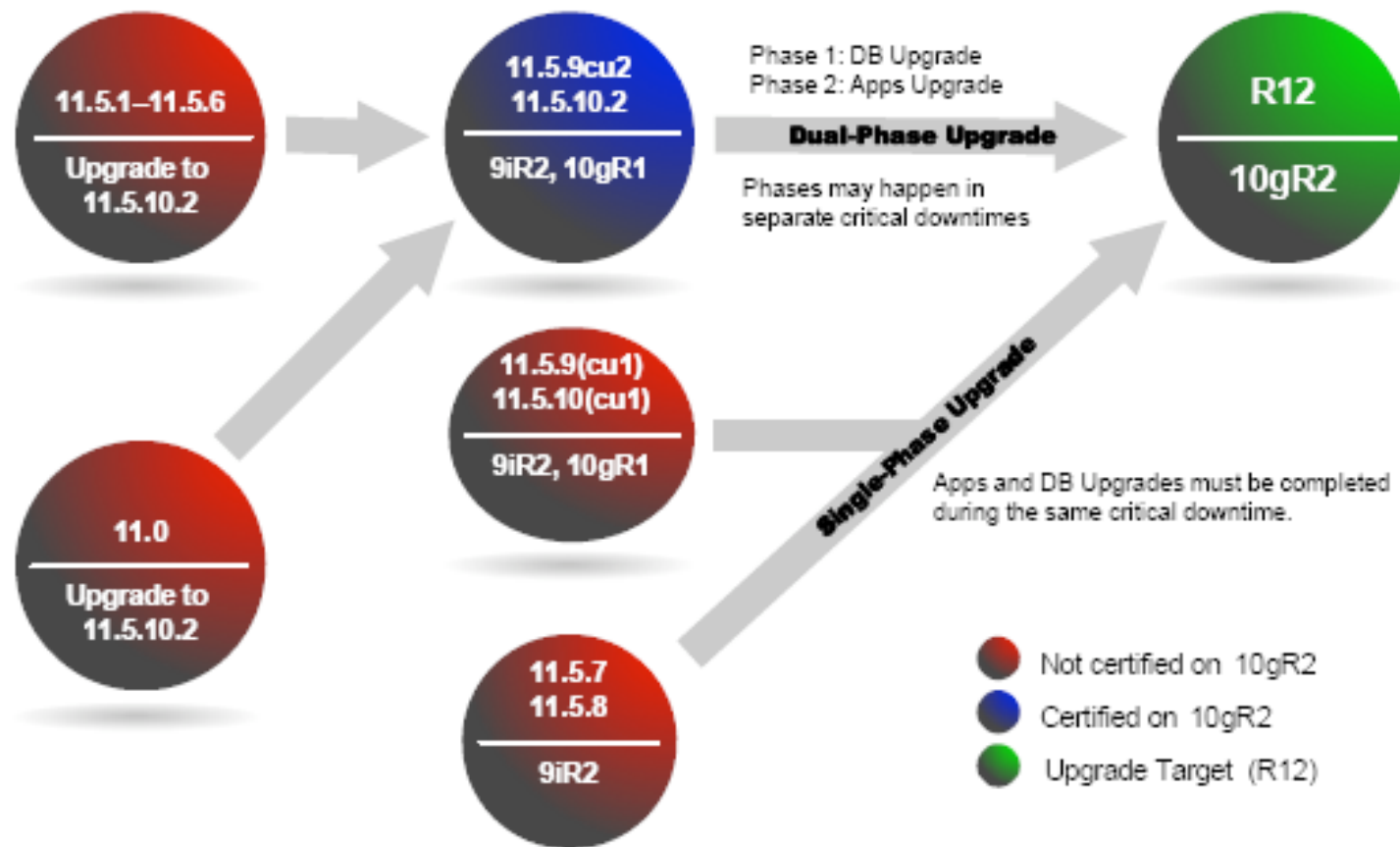
Oracle Support Considerations

Premier Support - provides you with maintenance and support of your Oracle Database, Oracle Fusion Middleware, and Oracle Applications for five years from their general availability date.

Extended Support - lets you stay competitive, with the freedom to upgrade on your timetable. It provides you with an extra three years of support for specific Oracle releases for an additional fee. You benefit from the same quality of service you receive with Premier Support, with the security of knowing you can expand your systems when the time is right.

Sustaining Support - puts you in control of your upgrade strategy. With Sustaining Support, you will receive technical support for as long as you operate your systems—including access to our online support tools, knowledgebases, pre-existing fixes for your solution, and assistance from technical support experts.

Upgrade Paths



<http://blogs.oracle.com/schan/newsItems/departments/release12>

What Can I Do Now? (Functional)

- Secure Executive backing – must have a business reason/driver for the upgrade
- Prepare for the R12 Upgrade – not a technical upgrade
- Read all functional whitepapers and documentation you can. Extensive new functionality in R12
- Read the Upgrade Guide - [Oracle Applications Upgrade Guide: Release 11i to Release 12.0.4 E12011-01](#) found in the 12.04 Documentation Library
- Carefully plan the project with a dedicated PM
- Spend some time on Metalink (<https://metalink.oracle.com>)
- Inventory all critical business processes
- Review your CRP / Testing process
- **Inventory your enterprise assets – get a grip!**
 - Information – Owner, Data Quality, Data Integration
 - Process – Owner, Connections, KPIs
 - Applications – Owner, Integration, Users
 - Projects - Processes, Applications Impacted, Migration Impact

What Can I Do Now? (Technical)

- **Migrate your technical knowledge**
 - Review the Tech Stack changes
 - Review the Architecture changes
- R12 Hardware Requirements - baseline
 - Disk Minimum 20% Growth
 - CPU Add 20% to 11i
 - Memory Add 20% to 11i
- Read the Upgrade Guide
- Learn about AIA (Application Integration Architecture)
- Learn about BI Publisher
- Apps DBA – study Upgrade process - practice

What Can I Do Now? (Technical)

- **Gather complete documentation for all of your customizations.**
 - Types, reports, screens, forms, workflow, tables, etc
 - Will they be eclipsed by with the upgrade?
 - Will they need to be enhanced or move to new technology?
- **If you have built customizations or extensions to Apps 11i using mod_plsql, Oracle Reports Server, Oracle Graphics Integration with Oracle Forms or Oracle Applications Framework pages in the AK Repository (AK mode) then you should review the following Metalink Note to evaluate the implications of Release 12's new technology stack on your deployment:**

Preparing Custom Development for Next Oracle E-Business Suite Release (Metalink Note 374398.1)

Best Practices - Approach

Oracle METALINK – Headlines – E-Business Suite – E-Business Suite Release 12 Upgrade Guide

- Evaluate - This section covers resources available to help you research the value available in a new release. Included are Release Notes, details on functional and technical enhancements, and related benefits.
- Plan - This section contains resources to help you plan your upgrade. Key assets include Evaluating and Planning Your Oracle Upgrade, and technical information for planning your sizing and platform strategy.
- Execute - This section includes resources for successfully executing your upgrade. Documentation includes the Upgrade process, collateral at the EBS, Technology Stack and Database levels, and Recommended patches for R12.
- Optimize - This section contains resources for optimizing your upgrade. Tips and recommendations for Performance Tuning, Optimizing Features and Troubleshooting are provided.
- **E-Business Suite R12 Information Center on METALINK**

Best Practices – Upgrade

R12 Upgrade Process

	Before Downtime	During Downtime	After Downtime
Technical Upgrade Tasks	<ul style="list-style-type: none"> • Familiarization and Sizing • Apply AD.I • Run TUMS • Establish Sufficient Tablespace Room • Migrate to OATM • Apply ATG_PF.H.RU4 (Migrate to Workflow for Alert E-Mails) • Various Product Related Tasks 	<ul style="list-style-type: none"> • Migrate to 10gR2 (if not already completed) • Apply R12 AD.A Minipack • Run the R12 Patch Driver • Apply Latest Product Patches • Configure and Start Services • Reapply Customizations • Finish System Admin Tasks (SSL, Workflow Mailer, XML Gateway, PDF Printing, XML Publisher Setup) 	<ul style="list-style-type: none"> • Verify Completion of Concurrent Programs • Install Online Help • Migrate Custom Development • Run Data Migration program for Historical Data • Update URLs in Open Workflows • Various Product Related Tasks
Functional Upgrade Tasks	<ul style="list-style-type: none"> • Familiarization • Business Process Mapping • Complete Optional Reducing Downtime Tasks in "Appendix E" of Upgrade Guide 		<ul style="list-style-type: none"> • Verification Tasks • Identify approach to Upgrade Historical Data

Slide from Considering an Upgrade to E-Business Suite 11.5.10.2 or R12? Learn From a Recent R12 Upgrade Glenn Webb -Principal Consultant/Applications DBA OAUG Collaborate '08

Best Practices - Execution

- Run the TUMS script
- Use the Maintenance Wizard!
- New Approach compared to previous upgrades
- Migrate to OATM
- Increase available storage (some tests implied 10%)
- Upgrading RDBMS to 10gR2 – it is certified with 11i (Oracle MetaLink Note 362203.1)

Best Practices – Reduce Downtime

- Upgrade to 10gR2 Now if 11.5.9.2 or 11.5.10.2
- Convert to Oracle Applications Tablespace Model (OATM)
- Upgrade to latest tech stack ATG
- Use TUMS to skip unnecessary tasks
- Follow Module Specific Tasks to Reduce Downtime in Appendix E of the R12 Upgrade Guide
- Consider Archive or Purge
- Utilize adequate hardware
- Utilize multiple Apps DBAs for Test Upgrades
- Practice at least three times (gather all timings on tasks)

Best Practices – Upgrade Tools

- **The Upgrade Manual Script (TUMS)**
 - The **TUMS** Patch # 5120936 for R12
 - The Upgrade Manual Script (TUMS) examines your current configuration and creates a report that lists upgrade tasks that *do not* apply to your system. This report contains information that is unique to your system configuration, so its output is relevant to your individual upgrade. Omitting the steps listed in the TUMS report can significantly reduce upgrade downtime.
- **Rapid Install**
 - Installs application products and technology stack components
 - Creates the new file system for the middle tier and database
 - After upgrade steps, used to configure and start services
- **AutoPatch**
 - Standard Application Patching Tool
 - Used to apply all patches including main R12 upgrade driver
 - Replaces the old AutoUpgrade tool

Best Practices – Upgrade Tools

- **Upgrade by Request**

- During upgrade, you can choose to upgrade only the most active data and postpone upgrade of historical data
- Upgrade by Request can be used to upgrade historical data that was skipped during the main upgrade process
- Limits Upgrade Downtime

- **Maintenance Wizard**

- Formerly Known as Upgrade Assistant
- Presents a consolidated, personalized set of instructions in a step-by-step format
- Validation of important activities
- Maintains log and status information for all tasks
- Downloads, merges, and installs many required patches automatically
- Provides project management utilities to record the time taken for each task and completion status

Best Practices – Post Upgrade

- Now is the time to consider additional modules
- Validate Security
- Start performance benchmarks
- Monitor CPU releases
- Oracle E-Business Suite Release 12 Maintenance strategy - Oracle will deliver code fixes for Oracle E-Business Suite Release 12 using two primary delivery methods -- One-Off Patches and Release Update Packs (RUPs).
- Stabilization period – Ahhhhhh!



Additional References

- **Oracle Lifetime Support Policy – Oracle Applications - Part Number C16238-01**
- **<http://blogs.oracle.com/schan> (Best darn Blog I've ever read)**
- **<https://metalink.oracle.com> (Metalink)**
- **<http://download.oracle.com/docs/> (12.04 Documentation Library)**

Questions / Answers

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PARTNER

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