Re-Implement in R12 - Just DON'T Do It! What we've learned the hard way.

Session ID#: TBD

Prepared by: Susan Behn
Vice President
Infosemantics, Inc.
Established in 2001
- SBA 8(a) Small Business disadvantaged company
- GSA Schedule contract GS-35F-0680V
- Texas State HUB vendor
- For more information, check out our web site at [www.Infosemantics.com](http://www.Infosemantics.com)
  - R12.1.3, R12.2, OBIEE public vision instances
  - Posted presentations on functional and technical topics
Agenda

- Upgrade vs. Re-implementation Terminology
- Evaluation process
- Re-implementation Drivers & Alternatives
- Objective decision matrix
- Q & A
Terminology

- **Re-implementation = “starting over”**
  - After installing Oracle software, configure, then use data conversion methods to load data using open interfaces or APIs (Application Programming Interfaces)
  - Compare this to your original implementation

- **Upgrade to R12**
  - Install Oracle Software
  - Use Oracle upgrade process to transform data
    - All data available
    - Process fully tested by Oracle
    - Significantly shorter/less costly
Potential Re-Implementation Consequences

■ Historical transaction data
  ▪ A significant amount of transactional history will be lost
    — APIs do not exist to migrate all historical transactions
    — Direct table updates are not supported

■ You may need to create reporting in a data warehouse to span old instance and new instance
  ▪ Do you have a data warehouse now
  ▪ What will is cost to normalize data with different configurations?

■ You may need to keep the sun-setted instance available in read-only mode
  ▪ Consider cost and maintenance requirements to maintain access
Evaluation process

- Identify long term corporate strategy
- Identify significant pain points
  - Include current pain points and expected pain with growth
  - This is a good way to engage your executives and get buy-in
- Evaluate customizations and extensions
  - Is there a plan to eliminate?
- Prioritize and quantify decision drivers
- Evaluate alternatives
- Evaluate time, pain, cost of re-implementation
- Enter results in decision matrix to quantify final decision
Challenge Your Thinking!

Typical Re-implementation Drivers and Alternatives
Typical Upgrade vs Re-Implementation

Drivers

- Multiple Instances
- Poor Data Quality
- Business Transformation
- Configuration Changes
- Eliminate Customizations
- Obsolete Data
- Downtime window
Driver: Multiple Instances

- Option 1 – Re-implement All Instances
  - Consider consequences presented

- Option 2 – Upgrade primary instance and roll in other instances using standard data conversion methods
  - Is volume low enough to avoid programmatic data conversion
  - Investigate AppsMigrate (3rd party product) for data conversion

- Option 3 – Use eprentise® to consolidate instances
  - Evaluate cost of eprentise® vs cost of data conversion

- Option 4 – Leave as separate instances
  - If the only reason to merge is for consolidated reporting
    - Consider implementing the Fusion Accounting Hub or use OBIEE
  - Evaluate cost and maintenance for maintaining separate instances
Driver: Extremely Poor Data Quality

- How bad is bad enough?
  - Did you compromise data due to direct table updates?
  - Did you improperly change your calendar?
  - Were you a beta implementation that resulted in bad data?
  - Is the condition of data requiring you to customize reports to accommodate data anomalies
  - Do you have a large number of SRs resulting in data fixes?
Alternatives: Extremely Poor Data Quality

- Option 1 - Re-Implementation
  - Consider cost of re-implementation versus cost of alternatives
  - You will still correct data problems as part of data conversion

- Option 2
  - Create a separate ledger or operating unit for transactions going forward
  - Use data transformation products to “clean” data?
    - Data Loader (Only for professional forms)
      - Example – close purchase orders
    - More4Apps (Some OAF forms)
      - Example – update Suppliers and Customers

- Option 3
  - EBS Standard Purge Processes
Driver: Business Transformation

- Has your business changed so much that the original design no longer works?
  - Consider your five year plan – not just business today
- Are your business users stuck in a rut
  - Will an upgrade result in maintaining the status quo
- Disparate business process – Do you have different processes in different locations that need to be more aligned?
Alternatives: Business Transformation

- **Option 1 - Re-implementation**
  - Re-implementations often drive new ways of thinking – but at a very high cost

- **Option 2 - Conduct a global meeting to define required changes, and define what data or processes may be changed**

- **Option 3 - Gamification**
  - Use gamification techniques to drive change
    - Consider Badgeville software or your own change management tools

- **Option 4 - eprentise®**
  - Transformation software allows configuration changes to define the global business process
    - Change flexfields, legal entities, currency, calendars, etc..
    - Merge sets of books/ledgers, inventories, organizational units
    - Divest business units
Driver: Configuration changes

Configurations changes can be driven by:

- Business transformations
- More sophisticated software providing better solutions
- Mergers and acquisitions
- Need to comply with new statutory, regulatory requirements in new markets

Examples of configurations that cannot be changed using seeded methods:

- Chart of account
- Calendar
- Costing method
- Flexfields
Alternatives: Configuration changes

- Option 1 – Re-implementation – the costly option
- Option 2 – Custom Solution – your own or other consulting firm
  - Many consulting firms have customized software to change configurations at a lower cost than re-implementation
    - Scripts need to be redone as requirements change
    - Full custom development effort with unit testing, error handling
- Option 3 – eprentise
  - Chart of account changes – eprentise FlexField® software
  - Other configurations – eprentise® transformation software
    - Change flexfields, legal entities, currency, calendars, etc..
    - Merge sets of books/ledgers, inventories, organizational units
    - Divest business units
- Option 4 – Create New Ledger, OU
  - Going forward only
Driver: Eliminate Customizations

- Did you follow standards when building customizations and extensions?
  - Naming standards help identify customizations
  - Extensions and personalizations should be utilized where possible
  - Use provided APIs to update data

- Do you have undocumented invasive customizations
Alternatives: Eliminate Customizations

- Identify customizations and extensions
  - 3rd party products to find customizations and extensions
    - Panaya
    - Config Snapshot
  - Contact your Oracle sales representative to get a CEMLI analysis
  - Consult other consulting companies for scripts to identify customizations
  - Find your own customizations and extensions
    - Queries
    - Oracle processes and reports
    - Migrate only what you need

- Determine whether new functionality can replace customizations
Query for OAF Pages with Personalizations

- Note that because many OA Framework-based personalizations are shipped with Oracle E-Business Suite either as "seeded developer" or "localization" personalizations, this list can be much longer than you expect.
  - There is currently no way to tell, other than by looking at the actual personalization or personalization document, whether a shipped personalization has been further personalized at your site.

```sql
SELECT PATH.PATH_DOCID PERZ_DOC_ID,
jdr_mds_internal.getdocumentname(PATH.PATH_DOCID) PERZ_DOC_PATH
FROM JDR_PATHS PATH
WHERE PATH.PATH_DOCID IN
  (SELECT DISTINCT COMP_DOCID FROM JDR_COMPONENTS
   WHERE COMP_SEQ = 0 AND COMP_ELEMENT = 'customization'
   AND COMP_ID IS NULL)
ORDER BY PERZ_DOC_PATH
```
Query for OAF Personalizations Created by Customer

- My Oracle Support Document 1292611.1
- This query does not include the seeded personalizations even if they have been further personalized at your site

```sql
SELECT PATH.PATH_DOCID PERZ_DOC_ID,
       jdr_mds_internal.getdocumentname(PATH.PATH_DOCID) PERZ_DOC_PATH
FROM JDR_PATHS PATH
WHERE PATH.PATH_DOCID IN
    (SELECT DISTINCT COMP_DOCID FROM JDR_COMPONENTS
     WHERE COMP_SEQ = 0 AND COMP_ELEMENT = 'customization'
     AND COMP_ID IS NULL)
  MINUS
SELECT PATH.PATH_DOCID PERZ_DOC_ID,
       jdr_mds_internal.getdocumentname(PATH.PATH_DOCID) PERZ_DOC_PATH
FROM JDR_PATHS PATH
WHERE PATH.PATH_DOCID IN
    (SELECT DISTINCT COMP_DOCID FROM JDR_COMPONENTS, JDR_ATTRIBUTES
     WHERE COMP_SEQ = 0 AND COMP_ELEMENT = 'customization'
     AND COMP_ID IS NULL
     AND ATT_COMP_DOCID = COMP_DOCID
     AND ATT_COMP_SEQ = 0
     AND ATT_NAME = 'developerMode'
     AND ATT_VALUE = 'true')
```
Removing OAF Extensions

- Multiple methods to remove OAF Personalizations described in MOS document “How to Remove an OA Framework Personalization [ID 304670.1]”
  - Use the Functional Administrator responsibility
  - Temporarily disable
    - Set the profile option “Disable Self-Service Personal” = YES at the site or application level
  - Use JDR_UTILS package
    - Jdr-utils.deleteDocument(path&name)
Form Personalizations

How to find them:
- Tools → Administration will show personalized forms
  - Press the Find button with the Form Name blank
Form Personalizations

- Where are they stored:
  - FND_FORM_CUSTOM_RULES
    - Data from header and condition
  - FND_FORM_CUSTOM_SCOPES
    - Data from context area
  - FND_FORM_CUSTOM_ACTIONS
    - Data from actions tab
- To remove all, purge the tables above
How to find other customizations

- Run your own scripts and check “last_updated_by”
  - Look at items where created by is a user other than “INITIAL SETUP”, “AUTOINSTALL”, “ANONYMOUS”
    - Responsibilities
    - Concurrent program definitions
    - Other configurations
We have too much data

- Re-implementation reduces data footprint due to loss of historical transaction data
  - Painful way to archive
  - History probably needs to be retained somewhere such as data warehouse

- Alternatives
  - HP Database Archiving Solution (recommended only for clones)
  - HP - Informatica/Tierdata solutions (Partitioning solution)
  - Implement Information Lifecycle Management (ILM)
    - Reducing Your Oracle EBS Data Footprint using Archiving, Purging, and Information Lifecycle Management [ID 752322.1]
  - Use eprentise® to “Divest” needed data into new instance
  - Archive and Purge using seeded purge programs
We have too much data - continued

- Query to find standard archive and purge programs

```sql
select substr(b.application_short_name,1,11) "APPLICATION",
    substr(a.user_concurrent_program_name,1,50) "CONCURRENT PROGRAM NAME",
    substr(a.concurrent_program_name,1,35) "SHORT NAME"
from fnd_concurrent_programs_v1 a,fnd_application_v1 b
where a.application_id=b.application_id
  and a.enabled_flag='Y'
  and (a.user_concurrent_program_name like '%urge%'
   or a.user_concurrent_program_name like '%elete%')
order by b.application_short_name;
```
Other Factors

■ Internal Resource Capacity
  ▪ Re-implementations require significantly more time

■ Downtime window
  ▪ The cutover window can be reduced farther in a re-implementation
  ▪ Existing instance remains as is
  ▪ Majority of install, patching and data conversion completed in advance
  ▪ Downtime weekend consist of incremental data conversion and testing

■ Oracle recommends the upgrade path
  ▪ Upgrade Advisor: E-Business Suite (EBS) Upgrade from 11.5.10.2 to 12.1.3 [ID 269.1]
# Summary Table of Alternatives

<table>
<thead>
<tr>
<th>Driver</th>
<th>Alternatives to Re-implementation</th>
</tr>
</thead>
</table>
| Multiple Instances            | Low volume – manual conversion for secondary instance  
                                | AppMigrate for Data Conversion for secondary instance eprentise®  
                                | OBIEE/Fusion Accounting Hub |
| Business Transformation       | Gamification - Badgeville eprentise® |
| Configuration Changes         | eprentise®  
                                | Custom solution  
                                | Create new ledger/OU |
| Too much data                 | Standard Purge Processes  
                                | HP Database Archiving or Informatica/Tierdata  
                                | Information Lifecycle Management (ILM) eprentise® (Divest using transformation tool) |
| Poor Data Quality             | Data Loader  
                                | More4Apps  
                                | Standard purge processes |
| Customizations and Extensions | Panaya or Config Snapshot  
                                | CEMLI analysis  
                                | Find your own |
## Decision Matrix

<table>
<thead>
<tr>
<th>BUSINESS DRIVER</th>
<th>Upgrade</th>
<th>Re-Implement</th>
<th>How Important is This?</th>
<th>Upgrade Score</th>
<th>Re-Implement Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Major configuration changes</td>
<td>Y</td>
<td>Y</td>
<td>10</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>Ability to better focus on elimination of a higher number of customizations(WRICEP) components and will result in better process changes (Re-implementation drives change mindset.)</td>
<td>Y</td>
<td>Y</td>
<td>4</td>
<td>0</td>
<td>4</td>
</tr>
<tr>
<td>Higher change management cost/impact resulting in additional training to accommodate changed processes.</td>
<td>Y</td>
<td>Y</td>
<td>5</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Keep all historical data</td>
<td>Y</td>
<td></td>
<td>10</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>Limited downtime window available for the upgrade weekend</td>
<td>Y</td>
<td></td>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Risk and cost of data conversion that would be required for Re-implementation</td>
<td>Y</td>
<td></td>
<td>10</td>
<td>10</td>
<td>0</td>
</tr>
<tr>
<td>Less time commitment required of functional team for upgrade</td>
<td>Y</td>
<td></td>
<td>7</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td>Data Quantity - Improved future performance due to bringing over less data</td>
<td>Y</td>
<td></td>
<td>5</td>
<td>0</td>
<td>5</td>
</tr>
<tr>
<td>Time to complete project</td>
<td>Y</td>
<td></td>
<td>5</td>
<td>5</td>
<td>0</td>
</tr>
<tr>
<td>Cost</td>
<td>Y</td>
<td></td>
<td>7</td>
<td>7</td>
<td>0</td>
</tr>
<tr>
<td><strong>Final score</strong></td>
<td></td>
<td></td>
<td></td>
<td>54</td>
<td>14</td>
</tr>
</tbody>
</table>
Summary

- Consider carefully a re-implementation decision
- The cost of the data conversion and loss of history can far outweigh the cost of 3rd party tools and development to fix issues and creativity
- Talk to people who have done it before
  - Would they do it again
- Talk to other experts
  - Upgrade SIG
    - Join the Upgrade Advisor Community
- Search for other presentations through OAUG
  - 10 Things You Can Do Today to Prepare for the Next Generation Applications – Cliff Godwin
Summary - The other side of the debate

- Everyone does not share my opinion…hard to believe 😊 😊
  - Complete a QUANTITATIVE evaluation
    - Separate data migration/conversion costs
    - Obtain an accurate estimate of costs, project duration
    - Determine what internal/external resources are required
    - Separate costs of customizations, interfaces, reports that would need to be completed with either a reimplementation or an upgrade
    - Separate cost of implementing new functionality
  - Do your research
    - What is going to be required to maintain a sunset instance?
    - What are the extra costs to extract data from sources other than a current production environment ((either data warehouse, sunset instance, or reports) )
Questions & Answers

Thank You!

Susan Behn
susan.behn@infosemantics.com

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