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Automation Or How We Eliminated Manual R12.2 Upgrades And Became Cost Savings Heroes

MAY 16 & 17, 2018

CLEVELAND PUBLIC AUDITORIUM, CLEVELAND, OHIO

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Agenda

- Introductions
- Organization Challenges & Applications Strategy
- R12.2 Upgrade Automation, Best Practices, & Lessons Learned
- "Voice of the Customer"
- Use Case for Automated Remediation
- Q & A

About the Speakers



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Veera Venugopal

- President & Founder of ennVee
- 30+ years of experience managing and delivering enterprise projects
- Former Oracle consulting practice leader at Whittman-Hart



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Joe Bong

- VP, Global Sales & Marketing at ennVee
- 30+ year IT consulting executive leadership
- Former COO/EVP at Whittman-Hart

- Professional services firm founded in 2003
- Expertise: Oracle ERP, BI, and allied technologies
- 30+ years' of global IT consulting experience in the Oracle space
- Global team headquartered in Greater Chicago, IL (Naperville)
 - Satellite offices in NJ & CA
 - 3 India-based Development centers (Bangalore, Chennai, Mangalore)
- Automation-based application delivery across on premise and Cloud platforms
 - EBS R12.2 upgrades, App/DBA Managed Support Services, Discoverer Migrations

Key Organizational Challenges

- Controlling costs of ERP systems of record by adopting an application strategy to reduce customization that drives up cost and reduces agility
- Remediating customizations as systems of differentiation during upgrades or consolidations
- Cost of maintaining ERP can be traced to poor customization practices
- Customization remediation is a major expense during upgrades and consolidations
 - Keeping the core ERP modules unmodified will reduce long-term costs and is appropriate for a system of record
- Latest Oracle releases provide a mechanism for segregating differentiating customizations (less intrusive and easier to evolve)

Industry Trends

- Organizational Application Strategy
- Upgrades/Consolidations are non-trivial programs that cost a significant proportion of implementation costs

What's at stake?

- Capital and enterprise disruption
- Business Demands
- Analytics & Scorecards

Application Strategy

Systems of:

Next Competitive
Advantages



Innovation

Business-Critical Processes
Current Competitive
Advantages



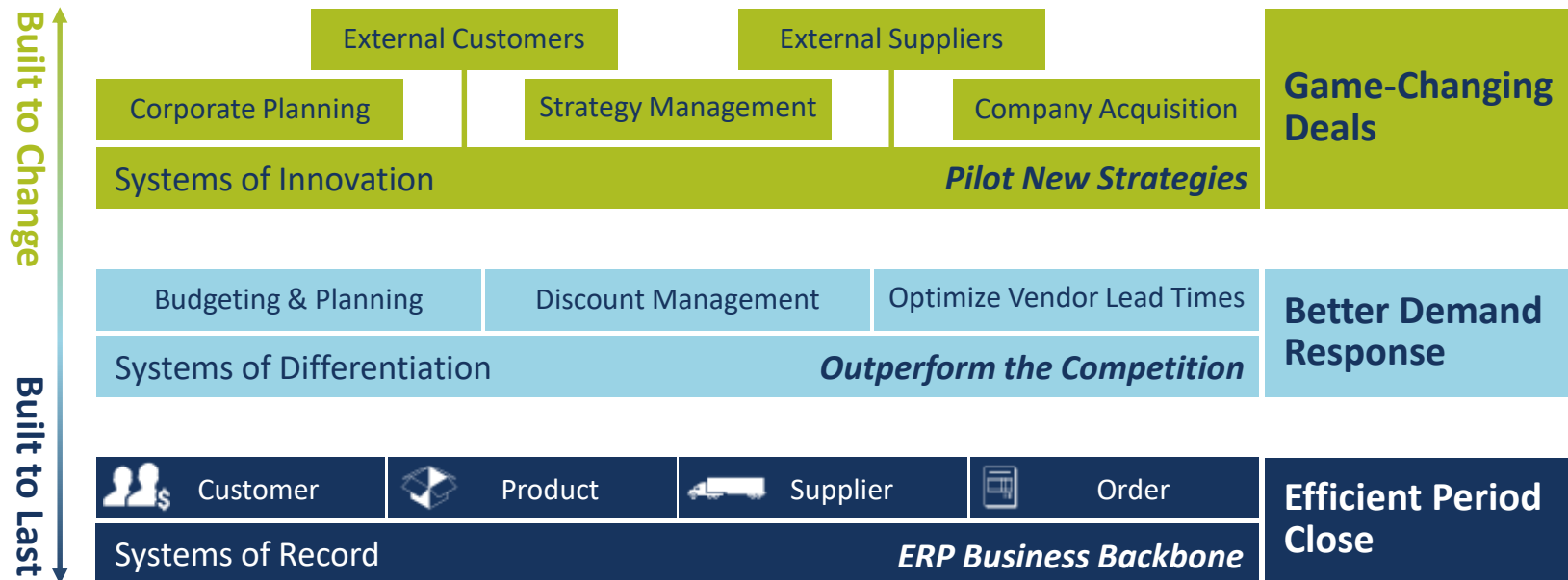
Differentiation

Standard Business
Processes
Operational Efficiency
Compliance



Record

Industry Trends



Industry Trends

Traditional

- Time to upgrade
- Testing process
- Patching
- Remediation
- Compliance
- Cutover

Automated

- Reduce Timeline
- Automate testing/remediation
- Eliminate reparation
- Automation of Migration
- Increase Quality
- Minimize error and disruption

The million dollar question: Why upgrade?

- Possibility of moving key extensions (Unique/Industry Specific)
- Current ERP is 10-25+ years old, another 10+ is inevitable
- Modernization for Operation Efficiency (Process/Features/Infra)
- Integration with Cloud Applications
- Consolidation of business units into a single instance
- Cost of maintenance (automation for steady state)
- Eliminate obsolete functionalities
- Stay "in support" with software vendors

Benefits of upgrading to R12.2

- Consolidation into single environments (application consolidations)
- System agility for changes
- OC reduction and increase productivity
- Easy adaption to mobility and multi-channels
- Open standards
- System Availability / Scalability / Performance
- Access to new functionalities
- Improved user productivity
- Adoption of industry standard technology
- Reduced IT OPEX



Great Lakes Oracle Conference

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R12.2 Upgrades: Best Practices & Lessons Learned

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Upgrading to R12.2

Best Practices

- Upgrade Path
- Automation of CEMLI remediation and Testing
- Decide on new business process changes
- Tuning the application
- Preparing the business community
- Accounting of Systems and Compliance
- Understanding of project risks and risk mitigation

Upgrading to R12.2

Key Learnings

Technical Upgrade Considerations

- Allocate appropriate time/resources for an iterative upgrade approach (nn simulations of the upgrade)
- Right-sizing Servers/Nodes
- Full M-log refreshes
- Early development of an instance strategy
- Capture baseline execution timing starting with the FIRST upgrade simulation
- Clear backup strategy
- Define a tight approach for patch tracking / application (patches required outside of the upgrade process to resolve application issues)

Integration Touch Point Planning

- The more integration touch points or 3rd party systems involved, the more complexity and opportunity for risk
 - **Example:** there may not be enough test instances to have a 1-1 correlation to Oracle Apps

Upgrading to R12.2

Key Learnings (cont.)

Object Remediation

- Remove all non-relevant objects from scope

(seeded and custom object remediation between Oracle Apps Versions)

- Identify all custom objects, assign priority and ownership (client or integrator team)
- Plan early for new RICE (functionality replacement or enhancement associated to Gaps between Oracle releases)

Purge Strategy

- Removing historical data from the Production environment can be a key contributor to short upgrade execution
- All Oracle modules do NOT have seeded archiving ability
- Legal involvement in the decision for purge windows can slow the process
- Purge / archive processing is not without issues (indexes needed, tablespace issues and more...)

Upgrading to R12.2

Key Learnings (cont.)

Runbook Documentation

(Detailed list of execution activities with timing and ownership for the upgrade go-live)

- Never too early to start this process
- The runbook should include activities owned by the business as well (configurations, penny-testing)

Oracle Apps Configuration

- Document profile options (before and after)
- Document new/revised application configurations to ease new instance setup

Solving these challenges

- Proprietary automation tools and processes that speed up the R12.2 upgrade process
- Pre-defined templates for the upgrade process
- Risk mitigation and solutions
- Menu of delivery models from a-la-carte to end-to-end



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"Voice of the Customer"

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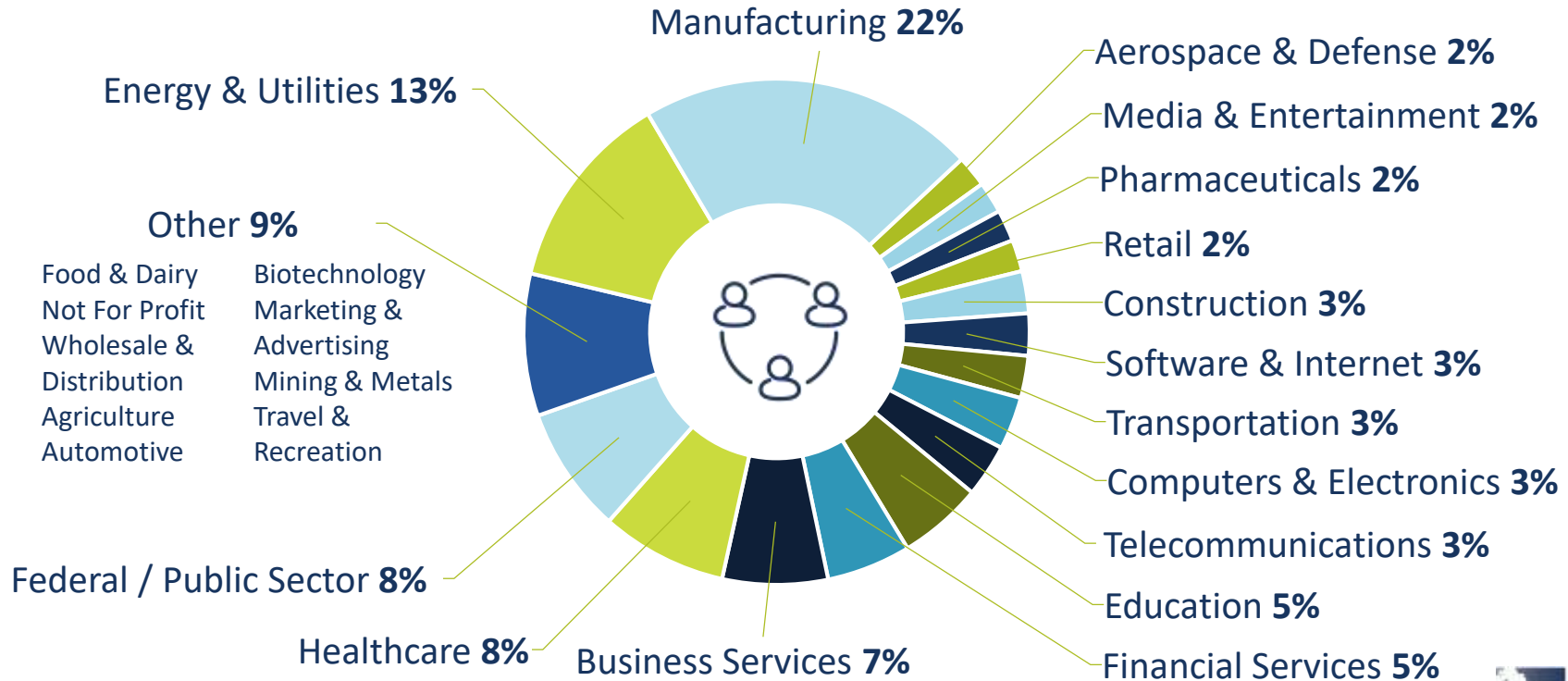
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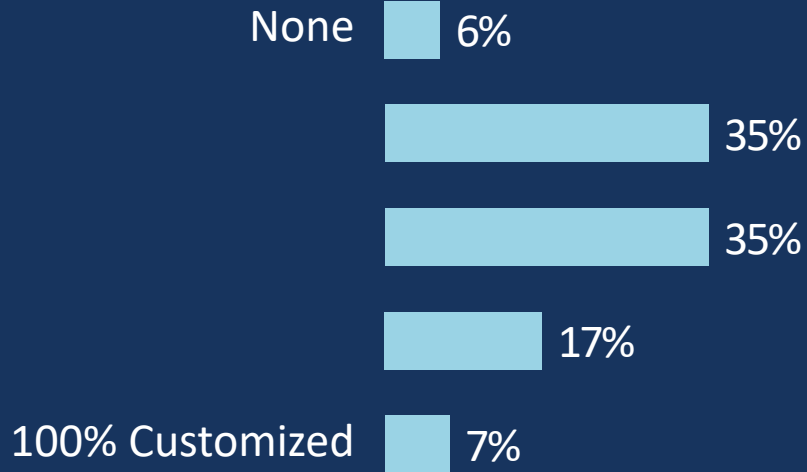
Voice of the Customer

- ennVee partnered with a third party survey firm to understand the business drivers, obstacles, levels of customization, and timelines of companies that have or plan to upgrade to EBS R12.2
- 500+ responses from IT leaders across the US
- Additional feedback on:
 - Replacing Oracle Discoverer
 - Application/DBA support services (challenges)
 - Managed support services options (during and post-upgrade)

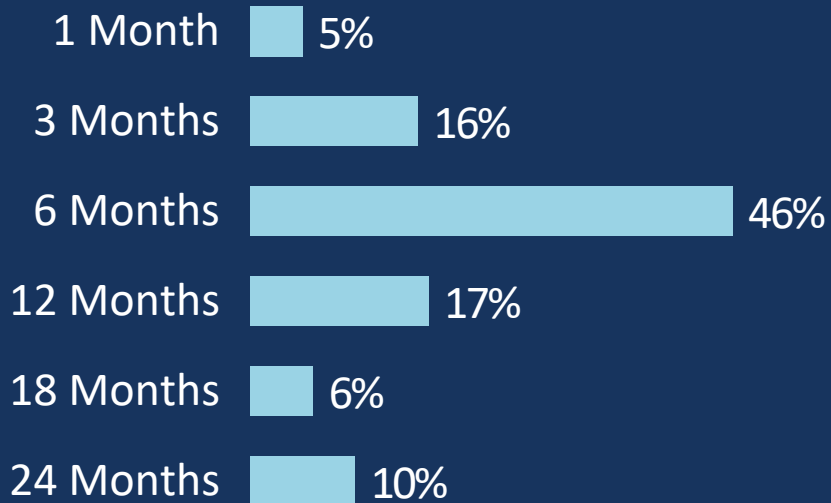
500+ IT leaders responded



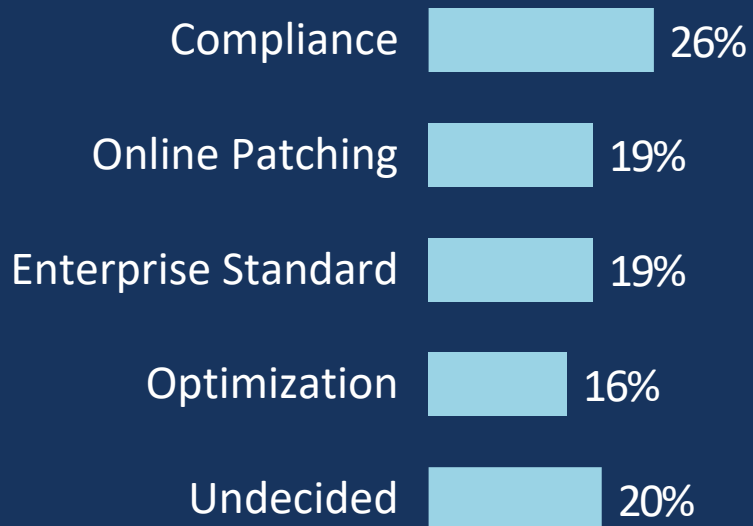
94% leverage some form of customization



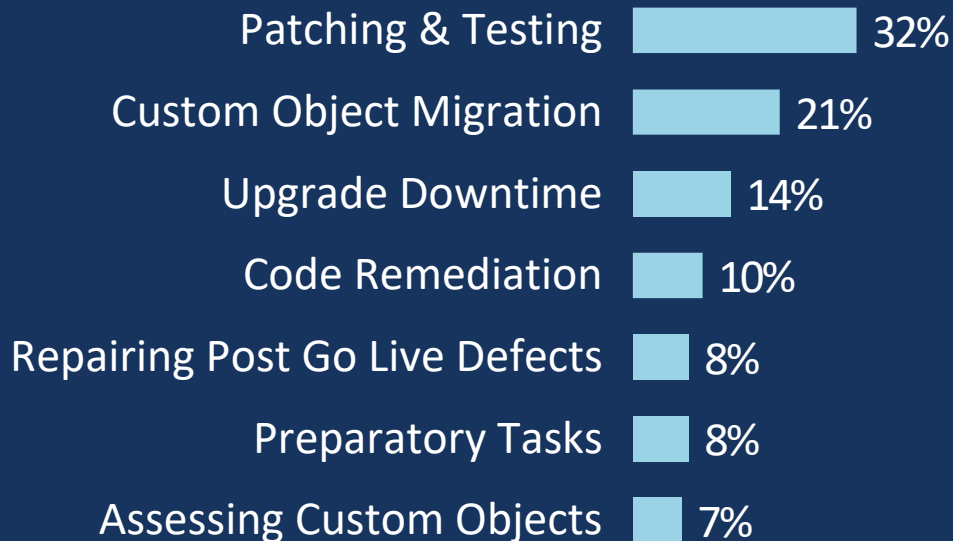
79% took at least 6 months to upgrade to R12.2.x



Business objectives for upgrading



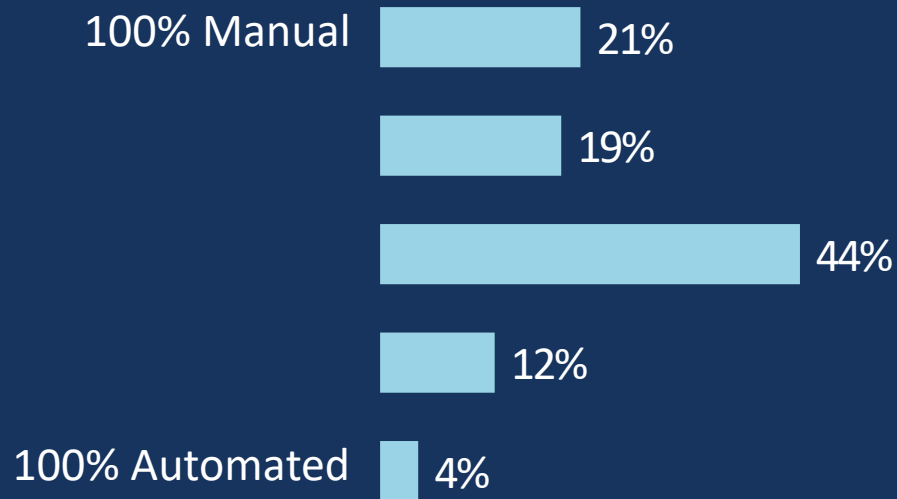
Biggest challenges



Other Responses

- Configuration
- Data Migration
- Upgrading without Customization
- Cutover
- Uptime
- Architectural Side
- Migrating RICE extensions & Elements

Manual vs Automated



How ennVee is helping customers during the upgrade process

- Automatically remediate 80% of all custom objects
- Automatically assess, organize, and track all customizations
 - Identify missing/suspect objects
 - Pick and choose what to remediate
 - Assign or retire objects
- Integrity Check (internal control process)
- To-be objects validation process
- Test Automation
 - One-time parameter capture
 - Built-in Compliance Check
 - Inbound/Outbound Connectivity Testing
 - Technical Objects
 - Validate compliance of any new customizations introduced in R12.2

Addressing challenges during the upgrade

- Reduce manual effort by 80%
- Minimize outages and reduce cutover by 4-5 hours
- Reduce prep work by 30%
- Reduce downtime by 70%
- Reduce development time, cost, and complexity by 55%
- Reduce overall upgrade time line by 50%
- Reduce testing time and effort
- Reduce re-work during SIT
- Eliminate manual error during remediation and migration
- Shrink consulting spend via automation

Addressing challenges during the steady state

- Proactive performance monitoring and preventive measures
- Automation of routine maintenance tasks
 - Reducing manual effort by 50%
 - Peace-of-mind
- Performance management
- Holistic monitoring of end-to-end portfolio
- Thresholds for core processes/activities
 - Auto actionable execution process
 - Meeting internal business SLAs
- 360° view of internal processes

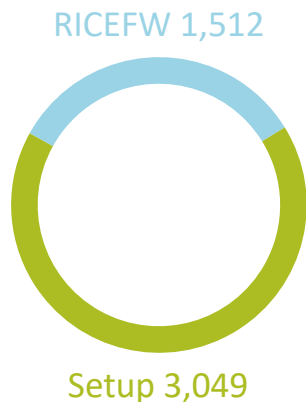


R12.2 Upgrade Automation Use Case

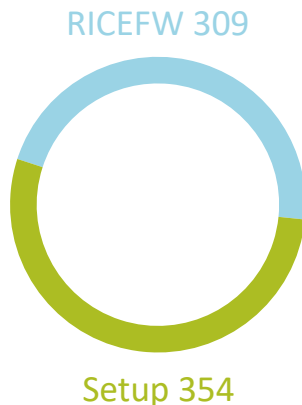
- Industry: Manufacturing
- \$600 Million annual revenue
- 1k-5k employees
- Moderately customized Oracle ERP
- 58,263 custom objects identified during assessment

58,263 custom objects identified during assessment

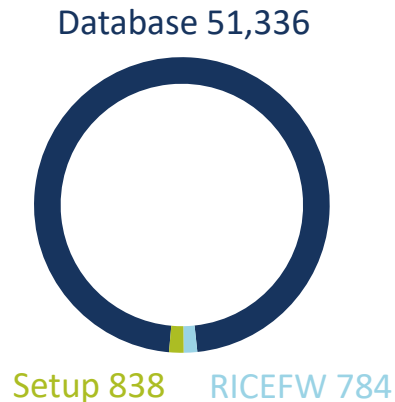
4,554
Active Objects



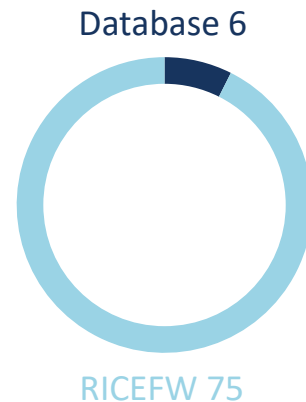
663
Inactive Objects



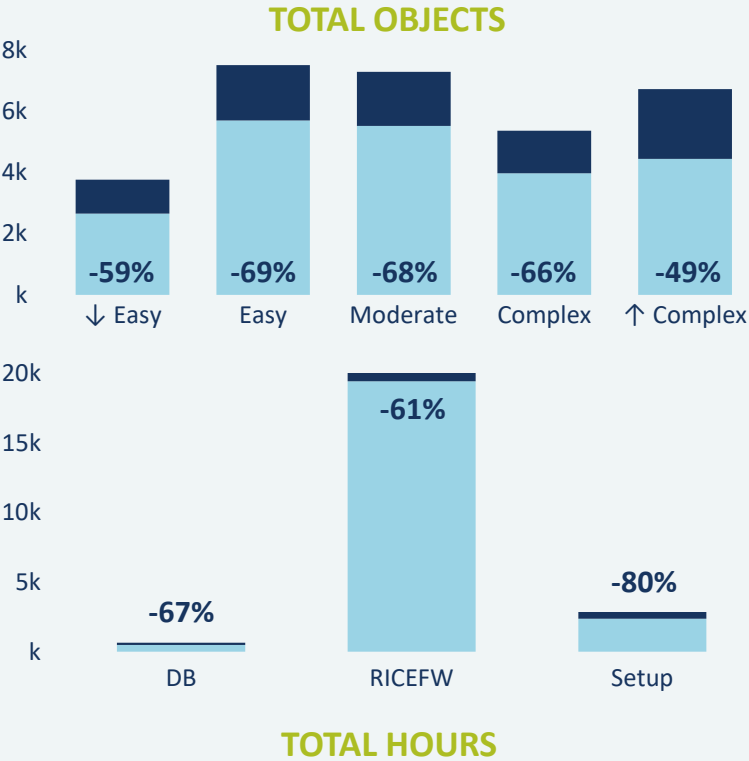
52,958
Valid Objects



81
Invalid Objects



Use Case: Remediation



	Custom Object Complexity					
Type	↓ Easy	Easy	Moderate	Complex	↑ Complex	Total Hrs.
Manual Remediation (Hours)						
DB	0	275	207	0	0	482
RICEFW	2,518	3,189	5,318	3,976	4,450	19,451
Setup	138	2,238	0	0	0	2,376

Total Manual Hrs: 22,309

Automated Remediation (Hours)						
DB	0	91.62	69	0	0	160.62
RICEFW	1,083	1,269.25	1,700	1,388	2,275	7,715.25
Setup	27.6	447.65	0	0	0	475.25

Total Automated Hrs: 8,351.12

Total Hours Saved: 13,957.88
-63.6%

Q&A / More Information / R12.2 Upgrade Assessment

4-6 week R12.2 Upgrade Assessment (fixed bid)

- Upgrade Roadmap
- List of all custom objects
- Detailed Object Count by Type, Category, & Status (active, inactive, valid, invalid)
- List of Impacted & Potentially Impacted Objects
- Custom Object Details (owner, type, name, creation date, category, total R12 changes, Effort, Schema References Used, etc.)
- Compliance Report (Impact Assessment)
- Inferences & Recommendation Report
- Remediation Estimate (Resources, Timeline)
- Upgrade Proposal (timelines, not to exceed pricing)

Thank you!!

More Information:

- Stop by booth #9 or contact Joe Bong for more information
 - (630) 413-4917
 - joe.bong@ennvee.net
 - ennvee.com/ennable
 - linkedin.com/company/ennvee
- **Download the infographic "Top R12.2 Upgrade Challenges, Business Objectives, Timelines, and more"- bit.ly/ennvee-infographic**



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Thank you!

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