

Upgrade / Migration Planning Oracle Applications Release 11*i*

Solution Beacon / OAUG
Release 11*i* Workshops
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Introductions / Experiences

- John Stouffer
 - Oracle Apps DBA with over 15 years experience performing more than 400 installations and upgrades
 - Releases 8 through 11*i*
 - Taught first ever Release 11 Install/Admin Classes for Oracle
 - OAUG Upgrade SIG Chair, OAUG 10.7 Desupport Committee Chair
- Alicia Hoekstra
 - Working with Oracle Applications since 1993
 - Served 3 years on OAUG Board of Directors
 - Releases 8 through 11*i*
- Performed 12 simultaneous upgrades in 1998
- Recently completed 15th 11*i* upgrade



Audience Profile

- Functional
 - Management
 - Analyst
 - End User
- Technical
 - Database Administrator
 - Web Administrator
 - Developer
- Current Application Release
 - Release 10.7, 11.0.x, 11.5.x
- Current User Interface(s)
 - Character, SmartClient, Citrix, OADM, NCA, ICA, JInitiator

The Project

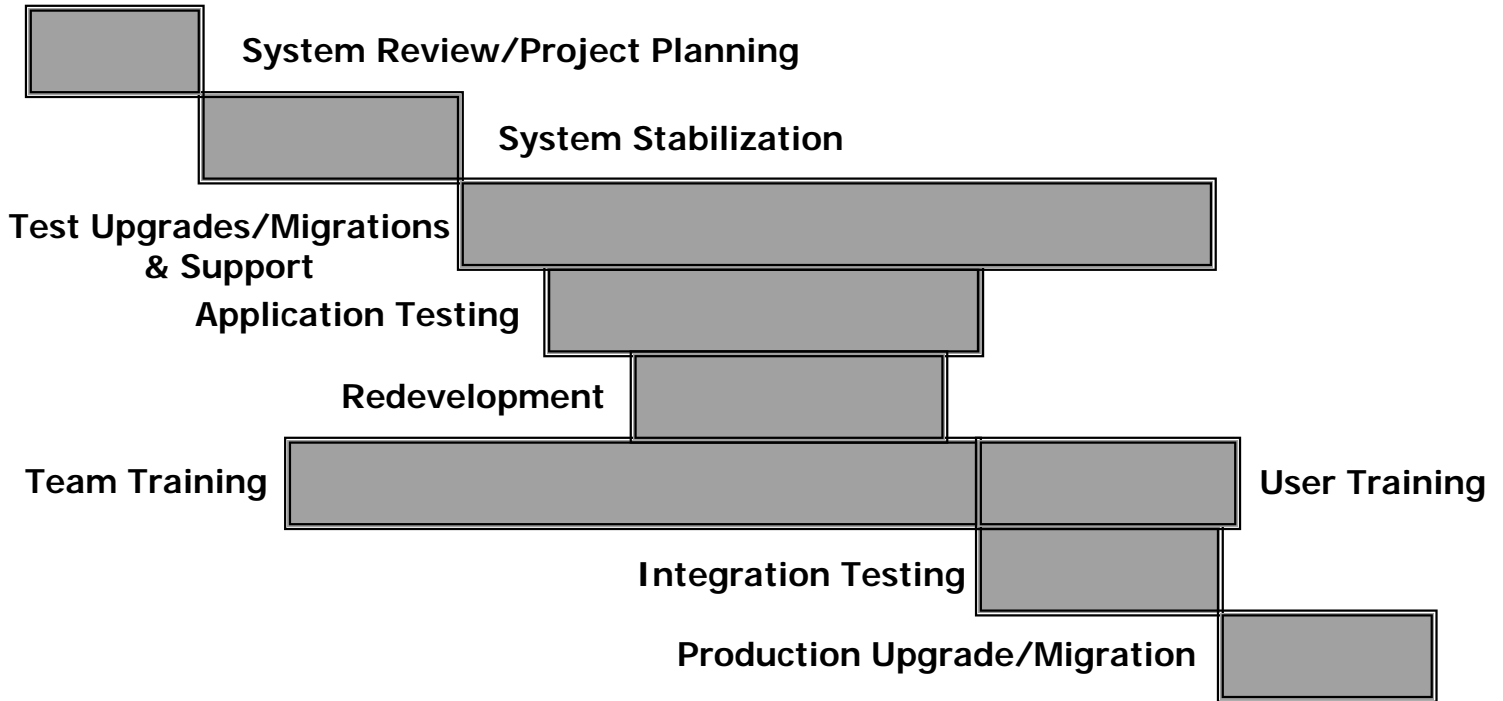
Every project is different ...

- ◆ Know where you're starting from (The Assessment)
 - ◆ Stabilize your current environment
 - ◆ Baseline current environment
- ◆ Know where you're going (The Plan)
 - ◆ Objectives
 - ◆ Upgrade or Re-implement
 - ◆ Upgrade vs Migration
 - ◆ Specific Release
 - ◆ Architecture
- ◆ Know what it takes (The People)
 - ◆ Sufficient personnel for all project roles

Typical Upgrade Steps – An Overview

- System Review and Initial Project Planning – minimum 3-8 days (Production)
- System Stabilization (Production) and Detailed Project Planning – Environment/Resource Dependent
- Test Upgrade or Migration and Support – 5-?+ days (use a Complete and Current Copy of Production)
- Application Testing and Support – Environment/Resource Dependent
- Extensions Re-Development and Remediation – Environment/Resource Dependent
- Training – Environment/Resource Dependent
- System Integration Testing – Environment/Resource Dependent
- Production Upgrade or Migration and Support – 3+ days

Timeline – One Example



System Review and Project Planning

- Hardware – Limited Number of Supported Platforms
- Software – Operating System, Oracle RDBMS, Tools, and Oracle Applications Installation and Technical Configuration – Upgradeable Combination – Server Partitioning Complete
- Resources – Technical, Functional, Education
- Extensions (Interfaces, Customizations)
- Environment – Split Configuration, Multi-User, Multi-Tier
- User Interface(s) and Desktop Configuration
- Project Planning (Approach, Timing)

Technical Assessment Report

- Systems Overview
- Current Risks/Issues
- General Remarks and Findings
- Specific Findings and Recommendations
 - Security / Risk Related
 - Performance / Stability Related
 - General / Standards Related
- Instance Details

... Document your baseline!

System Stabilization

- Prioritize
- Repair /Replace
- Baseline
- Hardware Acquisition and Installation
- Minimum Configurations – ***check MetaLink!***
 - 7.3.4 “Minimum”
 - 8.0.6 “Minimum”
 - 8.1.7 / 7.3.4 Server Partitioned (10.7)
 - Module patch sets “Minimum”

Test Upgrade/Migration & Support

- Hardware and Software Installation/Configuration
- Pre-Upgrade and Post-Upgrade Steps (Upgrades only)
 - Category 1, 2, 3, AutoUpgrade, Database Maintenance Patch
 - Category 4, 5, 6, Post Upgrade Tasks, Install Help
- Database Rebuild – Cleanup/Optimize/Resize
- Timings – 1st upgrade “technical”, 2nd upgrade “functional”
- Extensions
- Undocumented Upgrade/Migration Issues
- Patches
- User Interface(s) and Access
 - Client Configuration (CPU, Memory)
 - JInitiator and Browser

Test Upgrade/Migration & Support

- Backup / Recovery
- Patching
- Cloning
- Startup / Shutdown
- Monitoring
- Simplified OFA

Application Testing

- Data Validation
- Functionality
- Patches
- User Interface(s) and Access
 - Client Configuration (CPU, Memory)
 - Browser
 - JInitiator
- Future Usage
 - Products
 - Functionality
- Extensions ('as-is' or Redeveloped)

Extension Redevelopment

- Extensions include:
 - Enhancements
 - Customizations
 - Interfaces
- New Application Database Structures
- New Application Functionality
- New Tools
- Test Continuing Interfaces
- Test Continuing Enhancements/Customizations

Training

- Technical
- Navigation
- New Features
- New Functionality
- Changes in Business Process
- Character v. SmartClient v. Citrix v. OADM v. NCA v. R11i (ICA)

System Integration Testing

- A 'final' test upgrade
- Test New and Continuing Functionality w/Extensions (enhancements and interfaces)
- End-to-End Business Process Testing
- Performance or Stress Testing

Production Upgrade/Migration & Support

- Project Planning
- Communication and Preparation
- Timing Expected
- Test Upgrade/Migration Window Delays
- Adequate Testing
- Patches – Significant Impact
- Post-Upgrade/Migration Production Support

Major Risk Areas

- Hardware – Adequate
- Network/Connectivity – Adequate
- Client Configuration – Adequate
- Software – Certified – **PATCHES**
- Resources – Personnel/Time
- Extensions (Scope)
- Environment Stability
- New Modules (Scope)
- User Training
 - Interface
 - Functionality
- Server Configuration

Thank you!

If you have any questions or comments please contact us:

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