



# ORAU/ORISE Release 12 Upgrade

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*Performance*

*Quality*

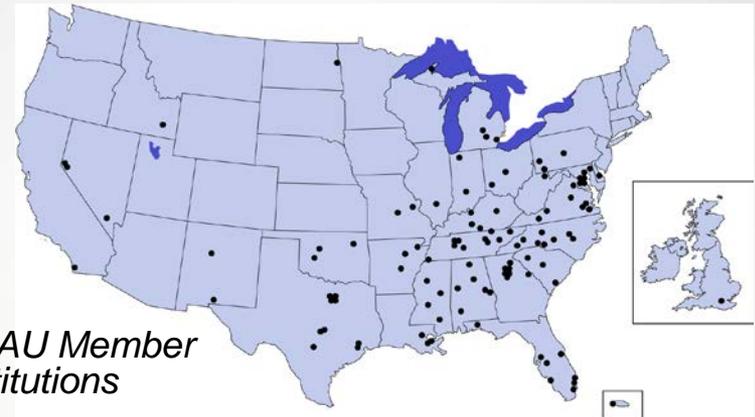
*Integrity*

Partnerships for Innovation

**ORAU**  
OAK RIDGE ASSOCIATED UNIVERSITIES

# Oak Ridge Associated Universities is a ...

... University consortium of over 100 universities focused on advancing scientific research and education through partnerships



... Partner with UT-Battelle to expand university collaboration with Oak Ridge National Laboratory



OAK RIDGE NATIONAL LABORATORY



... Contractor managing the Oak Ridge Institute for Science and Education for DOE - ORISE



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# Oak Ridge Associated Universities

- Founded - 1946 by Dr. William G. Pollard
- Total expenditures for FY 2011 – \$334M
- Corporate office - Oak Ridge
- Offsite offices - DC, Colorado, California, Maryland and Virginia
- Largest customer - DOE
- Corporate contracts with other federal agencies - NASA, DHHS, DHS
- Major business lines include:
  - Scientific Research and Education
  - Worker and Public Health Programs
  - Environmental Cleanup Initiatives.
  - National Preparedness (Terrorist Incidents, Natural Disasters and Health Threats)



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# Oracle at ORAU

- **E-Business Suite – 12.1.3**

- Oracle Time and Labor
- Accounts Receivable
- Accounts Payable
- HR
- Payroll
- Discoverer
- Purchasing
- General Ledger
- Projects Costing and Billing
- Employee and Manager Self Service
- Oracle Project Management
- Learning Management

- **Planned E-Business Suite Functionalities**

- OBIEE
- Project Analytics
- i Procurement

# Why upgrade from 11.5.10 to 12.1.3

- The threat of increased cost for Oracle extended support for release 11.5.10
- 12.1.3 was less “buggie” than previous versions of Release 12
- Support requests were sometimes resolved in newer versions
- Improved user interface in all modules
- Release 12.2 will be available soon and documentation states that an upgrade to at least 12.1.1 will be required prior to the upgrade to the latest version

# Decisions and Alternatives

- In-place Upgrade or Reimplementation
  - Had just re-implemented to Release 11i in 2007
- Utilize new functionality and/or change of business processes
  - Due to time constraints we chose in-place upgrade except for areas where business process changes had to be implemented (AP)
  - Looking at process improvements now
- Sr. Management approval
- Use consultants or internal staff for various roles including a project manager
- Developed project plan to determine if we could meet a mid-July production upgrade
- Upgrade database before/after implementation

# Prior Attempts

- Jan-June 2009 –  
Release 12.0.6

- Production environment - 11.5.10.2
- Release was extremely buggy
- Brought in a consultant who could not get the Accounts Payable module to function
- After returning from Collaborate, decided to stop the testing and wait for version 12.1.1

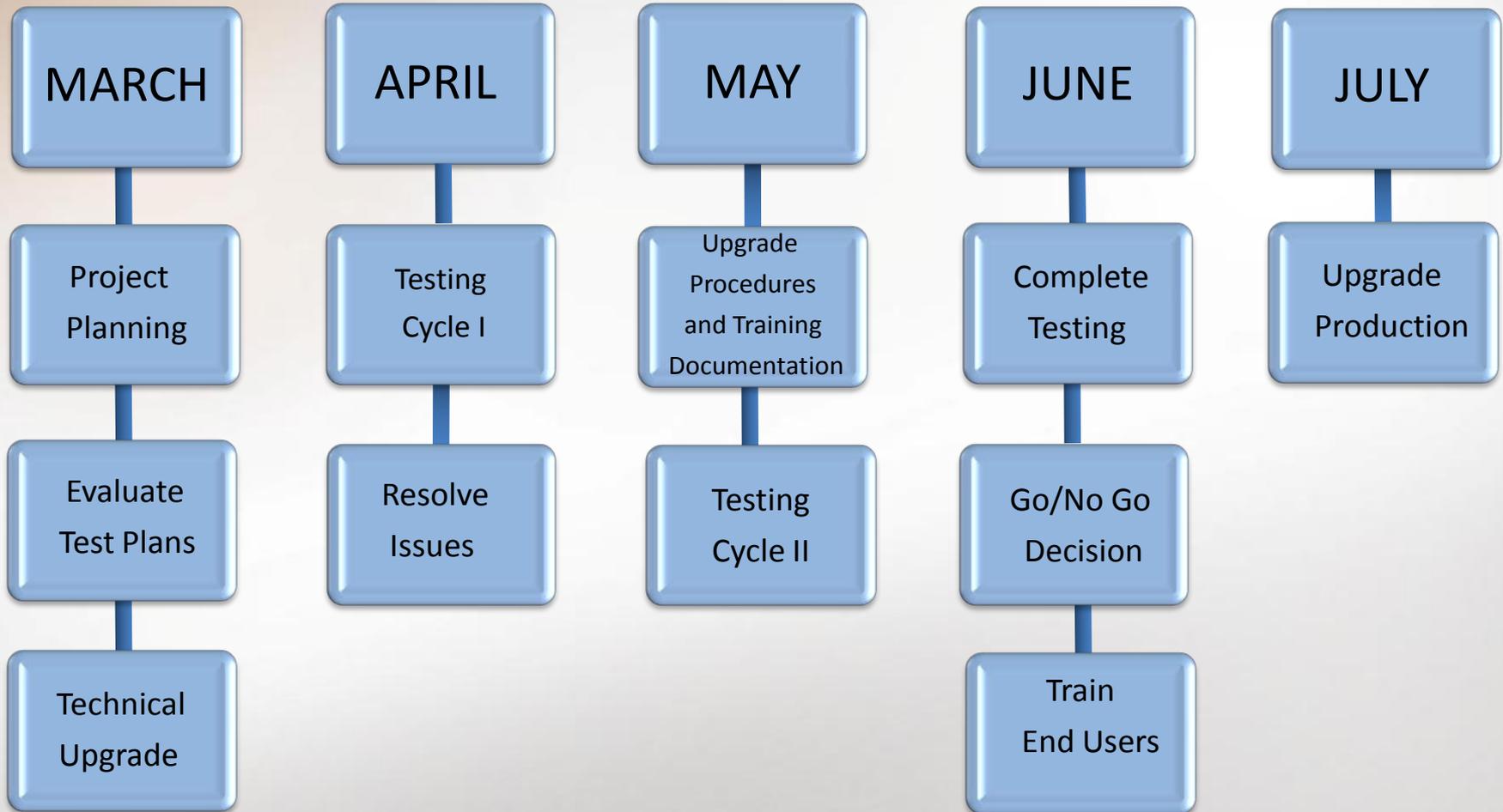
- Jan-June 2010 –  
Release 12.1.1

- Release was slightly better than 12.0.6
- Consultant helped us identify major issues with our bank set ups in 11i and what we needed to do to make the Accounts Payable module work
- Stopped the project in July. We could not cut AP checks and we decided we did not have time to upgrade production before the end of the fiscal year.
- After year-end closing, we upgraded production to Oracle's 11i baseline in order to maintain Oracle support.
- Nov 2010 – patched current system to baseline for Oracle support.

# Lessons Learned

- Do not upgrade to a newly released version of the applications
- Do not under estimate the changes and time required for set up and testing
- Consultant expertise with AP would be needed to convert banking data for suppliers
- AP staff needs extensive training before testing
  - Customized training onsite by R12 consultant
- Ensure staff has adequate time to test
  - Have a testing facility and block time for all functional and technical testers to be in the same test area
- Thoroughly test customizations, interfaces, and reporting

# 2011 R12.1.3 Upgrade Project Plan



# Recognition of Employee Involvement

- Celebrated the completion of 1st round of testing at the end of April
- Celebrated after the actual upgrade to production
- Employee received incentive awards

# Communication and Training

- Periodic announcements to all employees concerning major milestones and project updates during the testing phase
- Regular meetings between functional and technical leads
- Project Manager communicated on a regular basis with the CIO and other Sr. Management Staff
- Oracle functional leads trained the users in their areas on their module changes
- Just in time training for other users

# Go-Live

- Upgraded production beginning Thursday afternoon (after Payroll was submitted)
- Completed Sunday afternoon
- Functional leads met to complete a validation of their module
- System was ready to use on Monday morning
- Support center set up
- Seamless transition for Oracle Users

# Questions?

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