

Upgrade Strategies for Oracle E-Business: Leveraging Archiving Best Practices

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Today's Discussion

- What Drives E-Business Upgrades Today?
- Archiving and Upgrades
 - Concepts, Benefits
 - Key Requirements
- Incorporating Archiving into the Upgrade Project
 - Archive before the Upgrade
 - Archive as part of Upgrade
- IBM Optim TM

What Drives E-Business Upgrades Today?

- 2006: Oracle unveils Lifetime Support and Applications Unlimited programs
- 2007: Applications Integration Architecture announced; Fusion Applications strategy continues to evolve
- 2008: Initial Fusion Applications being released.



E-Business Upgrade paths to R12

For Applications IF you are on ..	Then your supported path is
11.0.X	11.5.10 CU2 then release 12
11.5.1-11.5.6	11.5.10 CU2 then release 12
11.5.9-11.5.10	Release 12
For the Database if you are on..	Then your supported path
11.5.7 or 11.5.8 with 9.2.0.x database	Upgrade to 10GR2 and R12 at the same time
11.5.9 or 11.5.10 (base or CU1) with 9.2.0.x or 10.1.0.x database	Upgrade to 10GR2 and R12 at the same time or with two separate downtimes for each tier
11.5.9 CU2 or 11.5.10.2 with 10.2.0.2 database	Apply db tier patches and proceed with R12 upgrade

The Bottom Line

- E-Business sites: there's an upgrade in your future
- Taken together, Lifetime Support and Applications Unlimited extend the useful life of current applications
- AIA strengthens value proposition, especially for sites with mixed applications environments
- To take advantage of enhanced functionality and more modern infrastructures within existing applications, **eventually you'll need to upgrade**
- Gartner: "...continued maintenance and upgrade within the Applications Unlimited family compares favorably with the expected cost of migrating to Fusion Applications...."¹

1. Jeff Comport & Yvonne Genovese, AIA Strengthens Applications Unlimited as a Viable Long-Term Strategy for Oracle Customers," Gartner, 2007

Drivers of Project Success

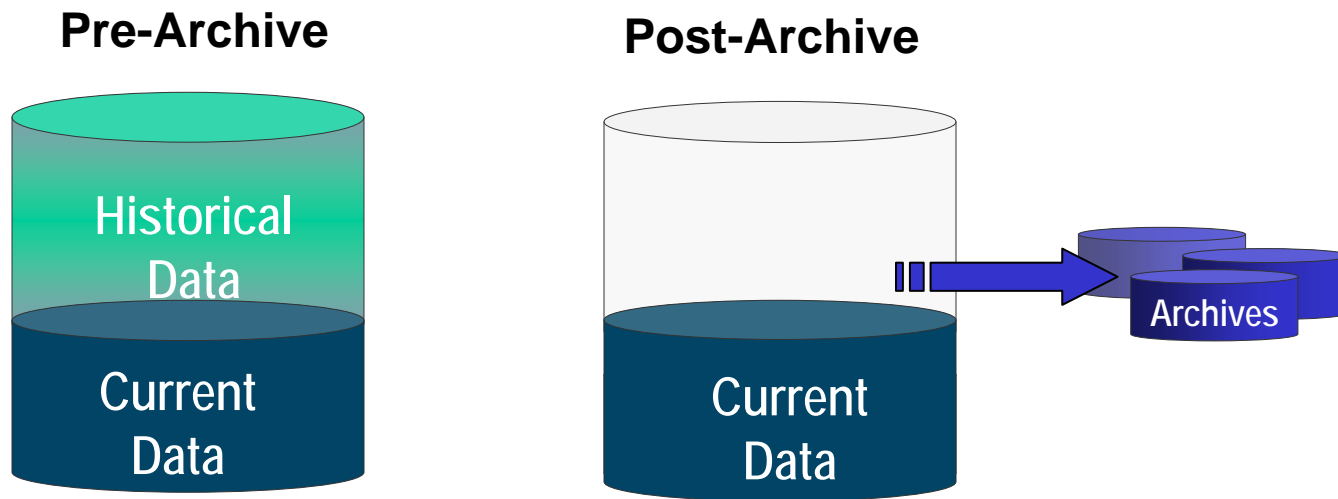
If you measure success by ability to...

- Streamline & automate business processes
- Increase ROI from investments in ERP systems
- Reduce the time to “go live,” minimize downtime
- Improve “compliance readiness”
- Control project costs
- Improve application performance and service levels

Archiving can play an important role in improving the success of your upgrade project

What is Archiving?

- Segregate historical E-Business application data by age, status, event or other criteria
- Copy historical records to a secure archive
- Delete transaction details from production system
- Retain access to information for query, reporting, customer service, audit and discovery requests



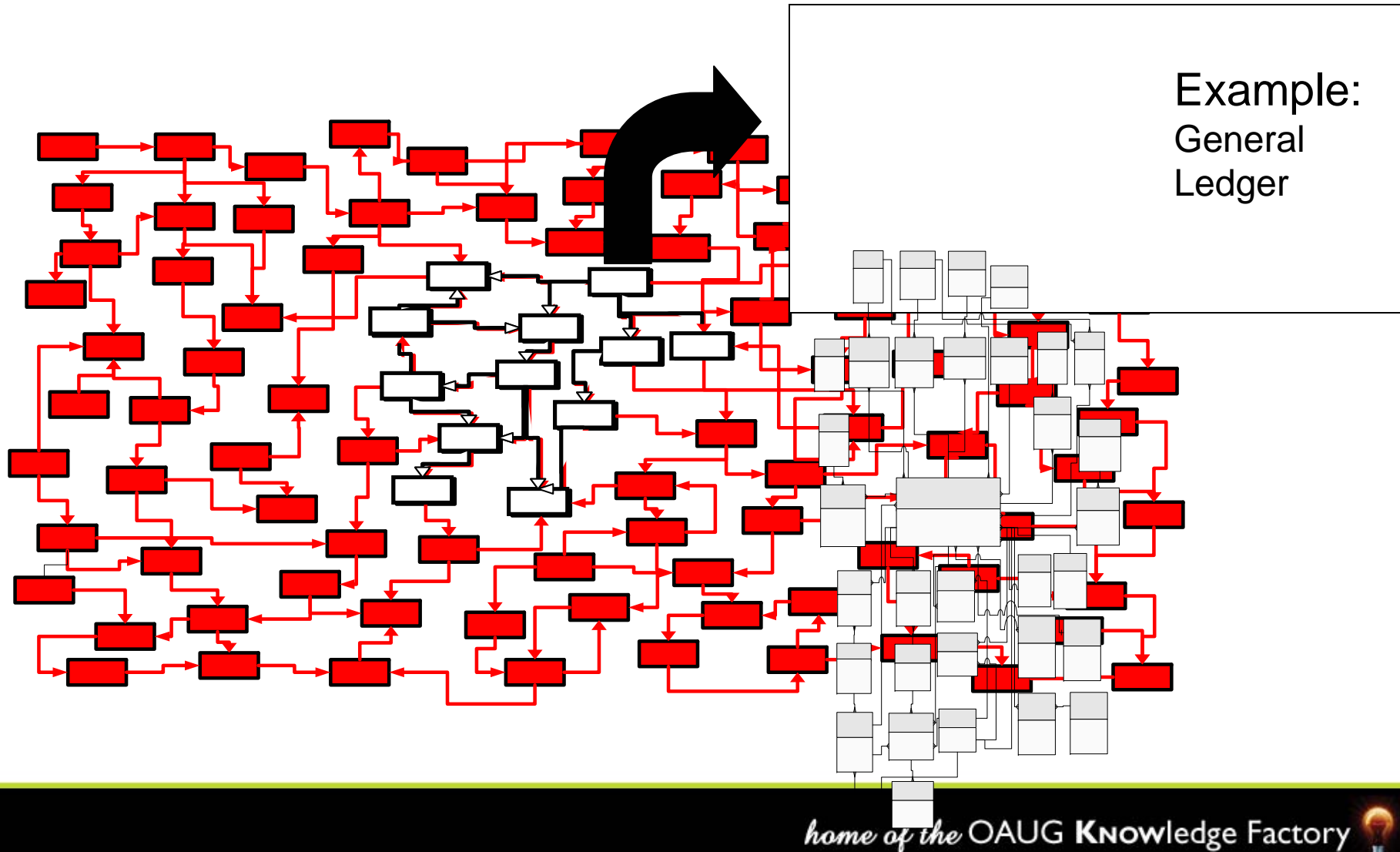
What are the Benefits?

- Streamline the upgrade project – success from Day One!
 - Reduce downtime during conversion by 50% or more
 - Improve application performance from old version to new version by reducing OLTP workload
- Maintain a Superior Ownership Experience - ongoing
 - Reduce backup and disaster recovery time by hours
 - Lower database maintenance time for tasks like reorganizations, refreshes, clones
 - Support “compliance readiness”
 - Ensure consistent performance to Service Level objectives
 - Reduce cost of storage and overall TCO

Archiving: Key Requirements

1. Take right data out
 - Complete Business Object
 - Apply Functional Condition Checks
 - Accommodate Unique Business Requirements
2. Store it where you want
 - Support data retention policies as per ILM business requirements
 - Multiple formats – DBMS, File
 - Storage options – hardware targets, tiers
 - Automate enforcement of retention & disposal policies
3. Access archived data when and how you want
 - Native application access
 - Application independent access

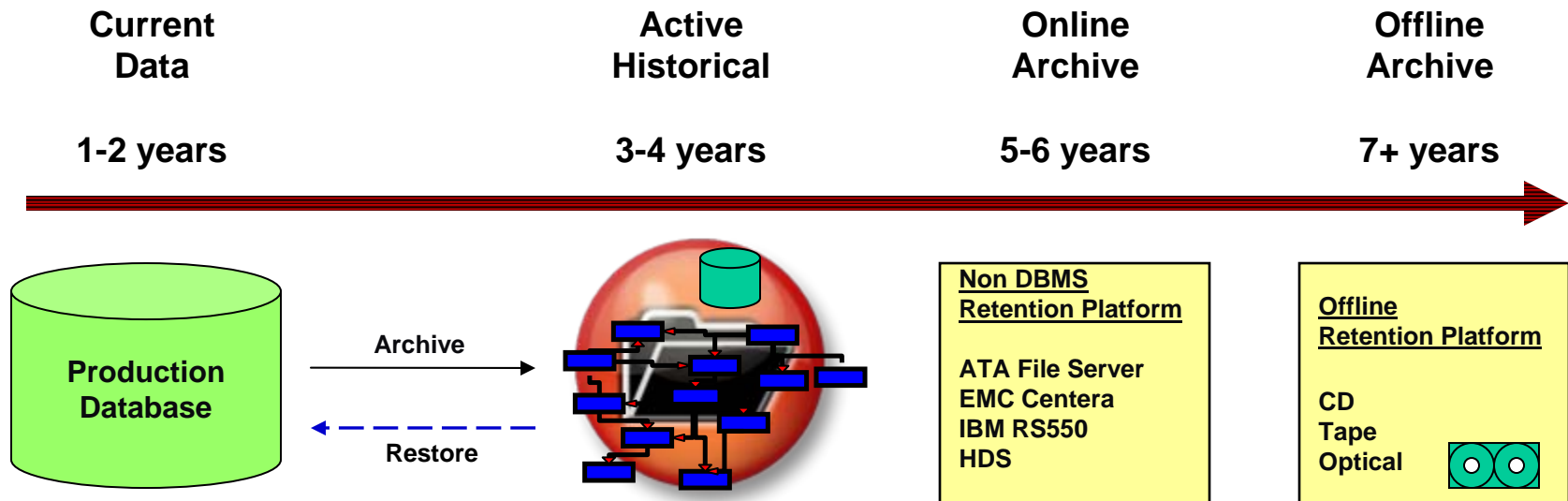
1. Take Right Data Out



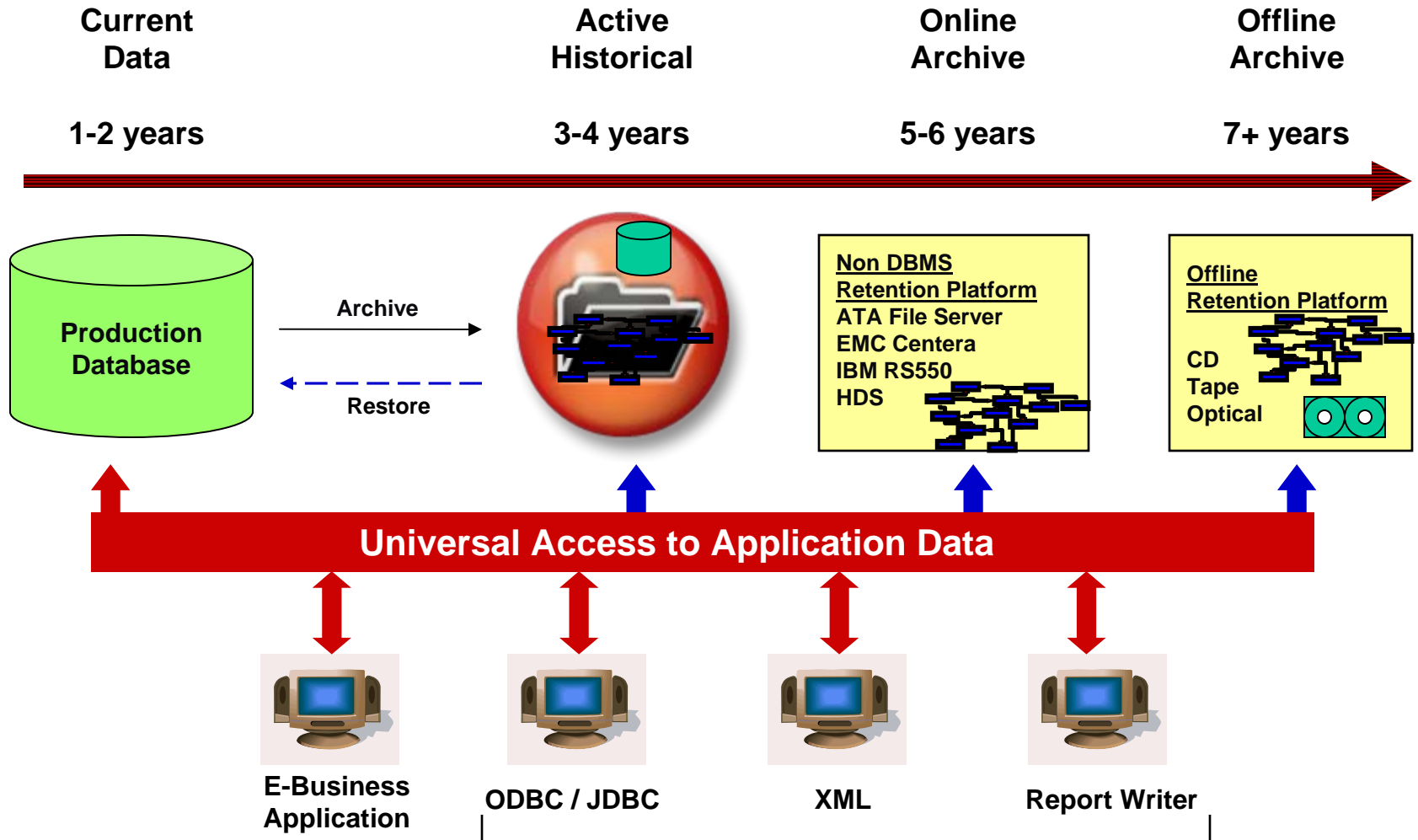
Functional Condition Checks Example

General Ledger	Archive <i>Ledgers</i> and <i>Journals</i> for any Accounting Period , Business Unit and Ledger Group values
Accounts Payable	Archive <i>Vouchers</i> and <i>Payments</i> for any Accounting Period , Bank Set ID and Bank Code values
Accounts Receivable	Archive <i>Items</i> and <i>Payments</i> for any Accounting Date and Business Unit values
Billing	Archive <i>Invoices</i> (as well as consolidated Invoices) for any Accounting Date and Business Unit values

2. Store It Where You Want



3. Access Archive Data When and How You Want



Where does Archiving Fit?

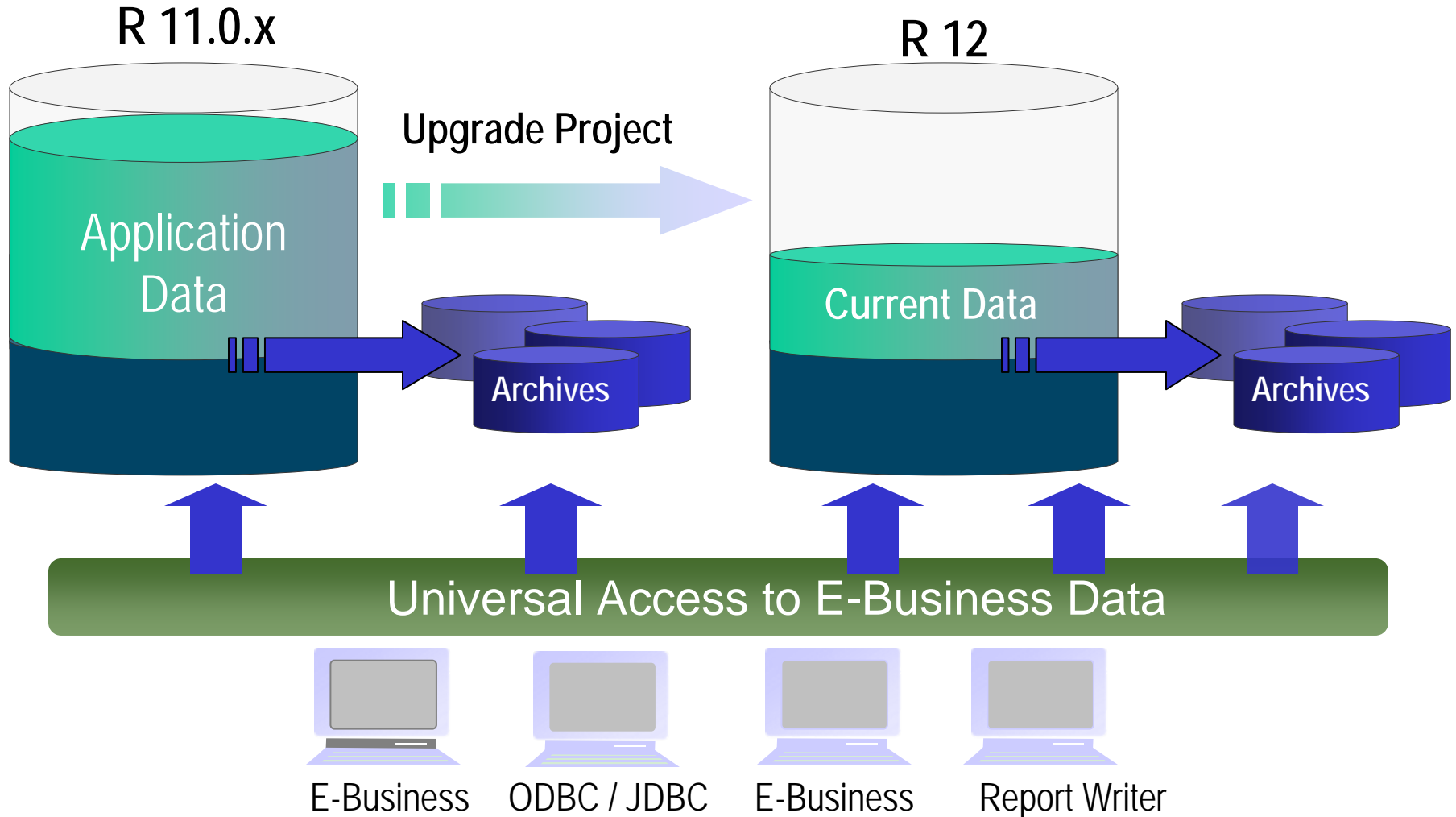
1. Archive before an Upgrade

- Reduces amount of data to convert during production cutover
- Reduces downtime during upgrade

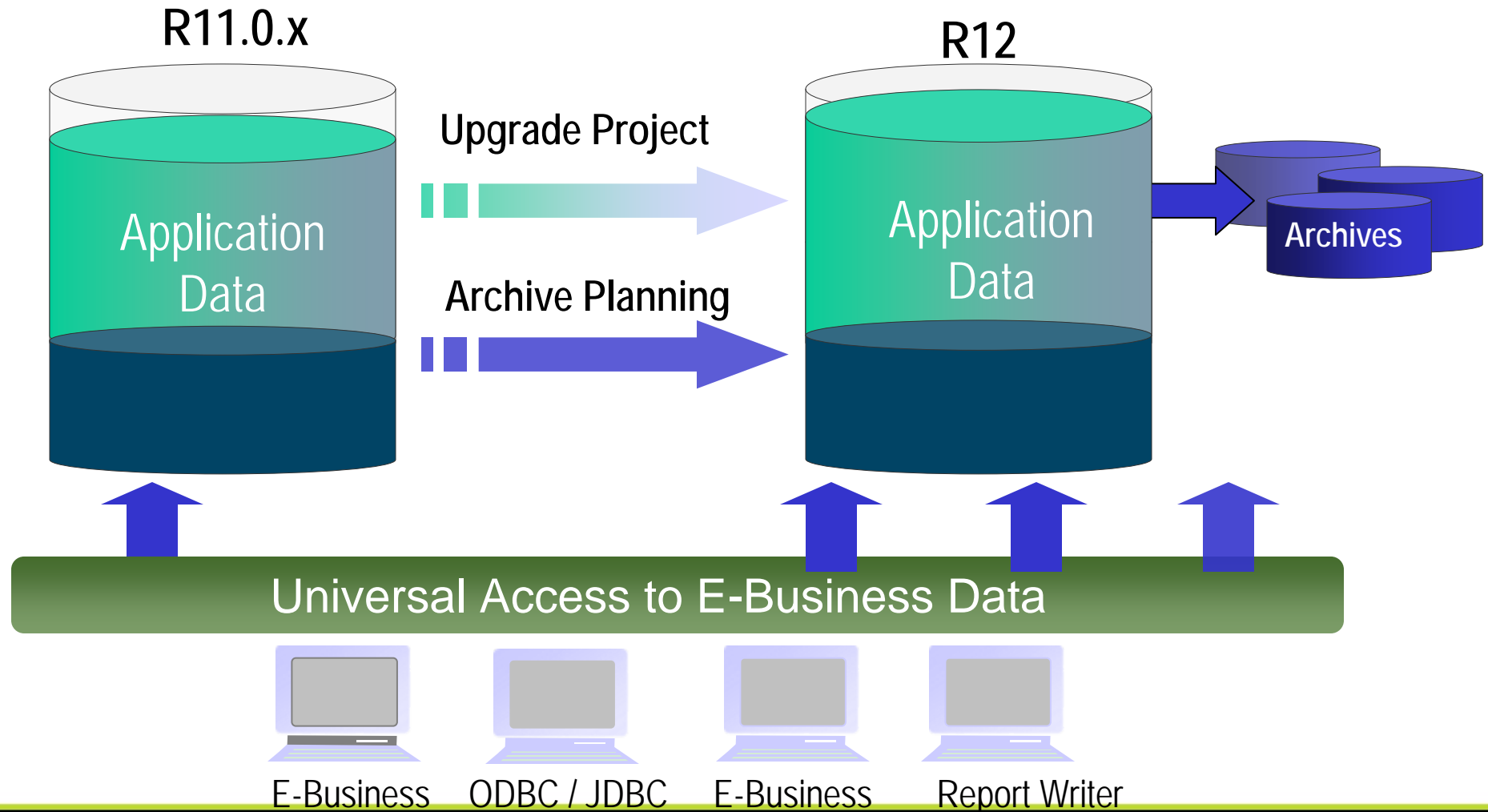
2. Archive in Parallel with an Upgrade

- Combines common technical and functional tasks to save overall elapsed time
 - Technical tasks: validate individual steps (such as moving query tables forward), validating new technical environment, performance testing
 - Functional/business tasks: reconciling “before” & “after” results, regression testing on key business processes (such as payroll processing or financial close)

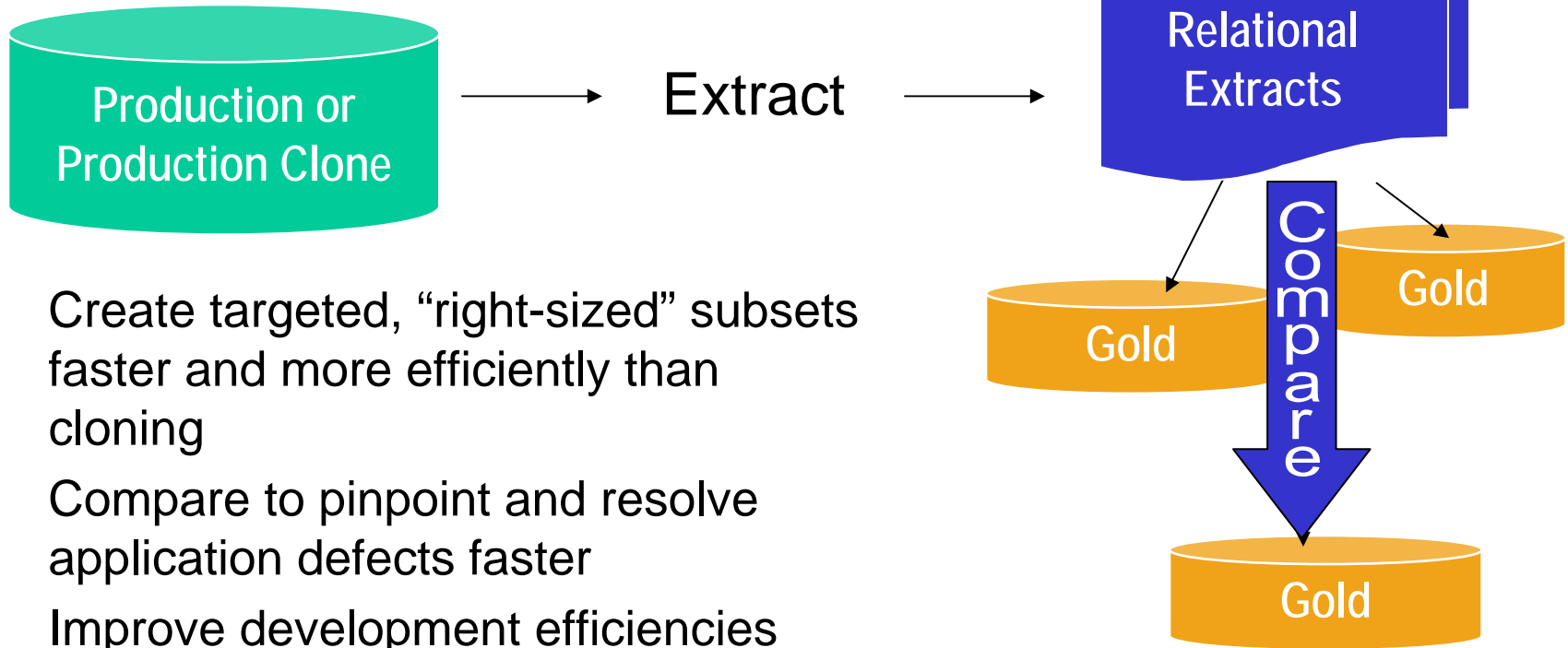
1. Archive Before Upgrade



2. Archive and Upgrade Projects in Parallel



Managing Test Data



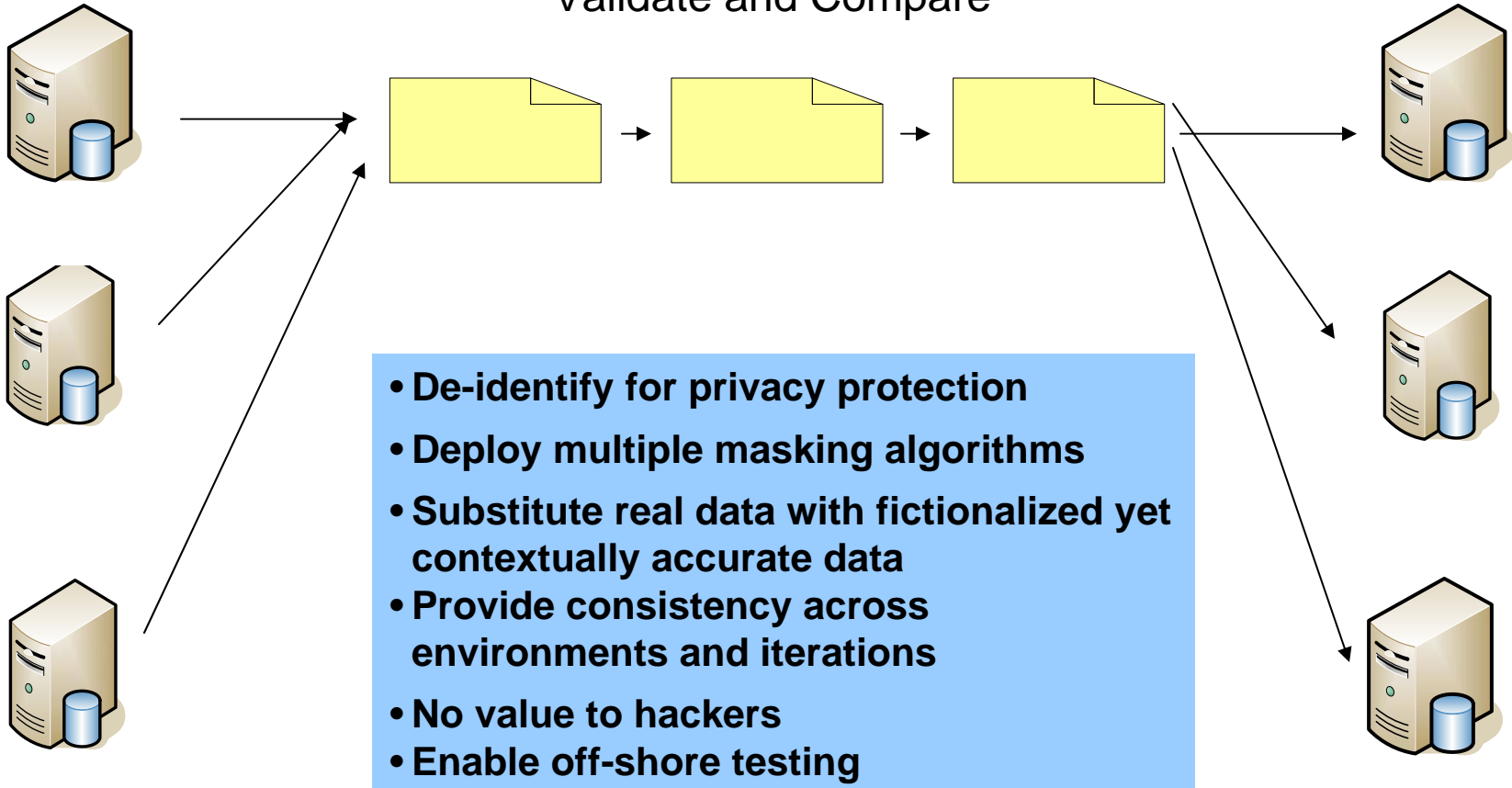
- Create targeted, “right-sized” subsets faster and more efficiently than cloning
- Compare to pinpoint and resolve application defects faster
- Improve development efficiencies

Protecting Data Privacy

Production

Validate and Compare

Test



Ensure Data Privacy Across Non-Production Environments!

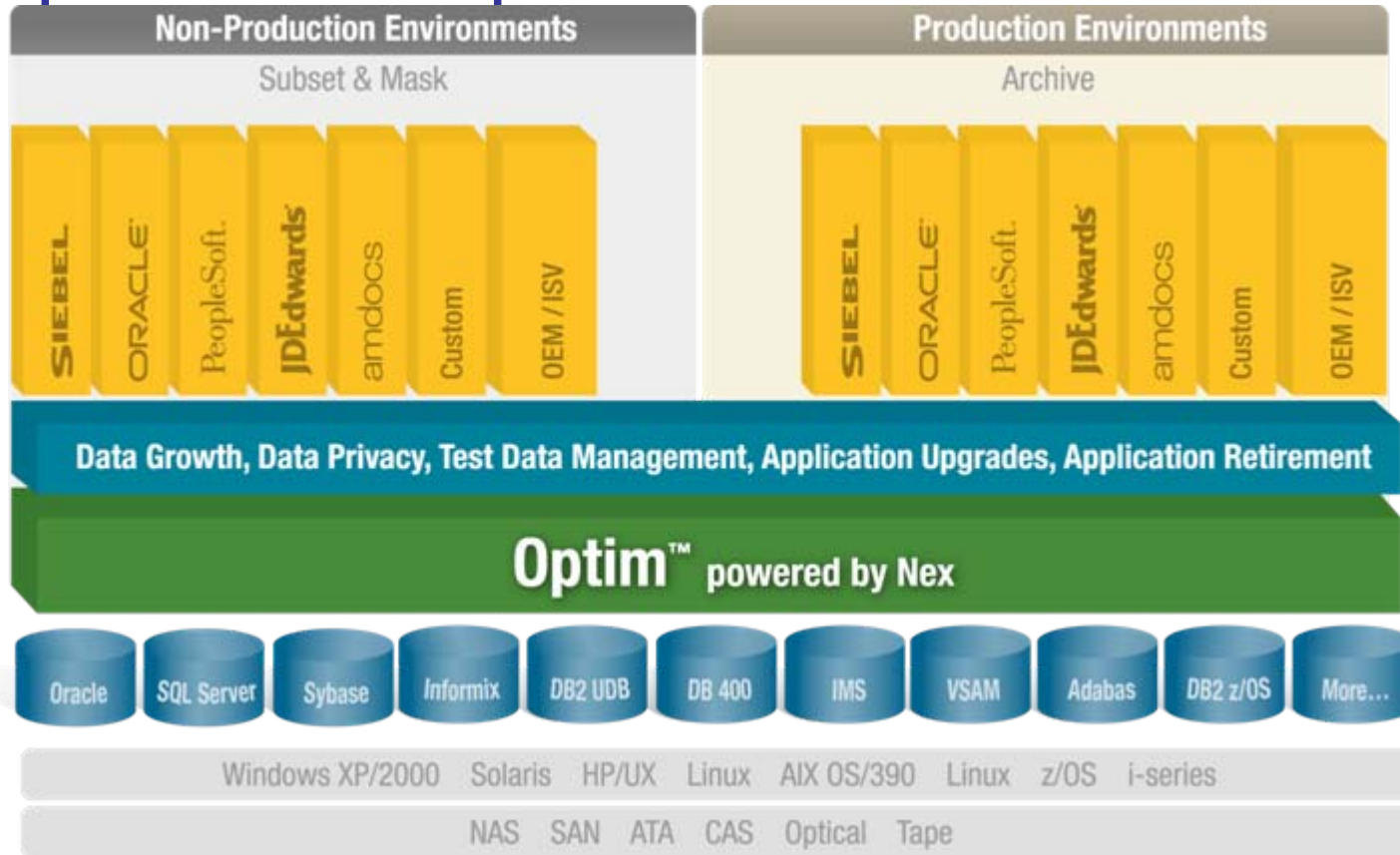


OPTIMIZE™

Introducing IBM Optim™

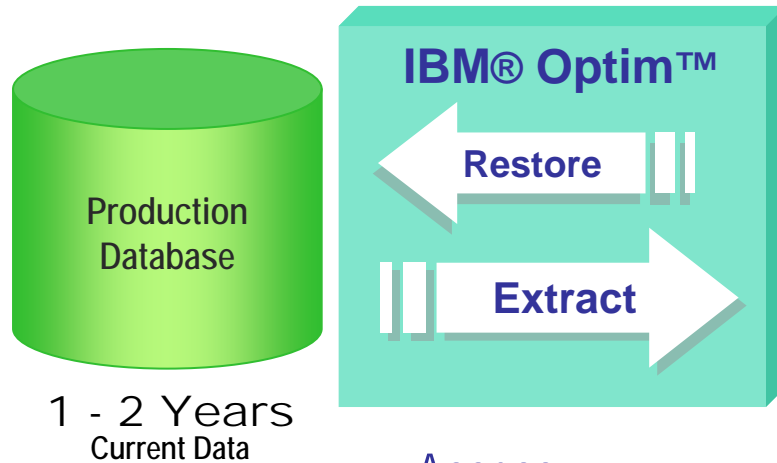


IBM Optim: Enterprise Architecture



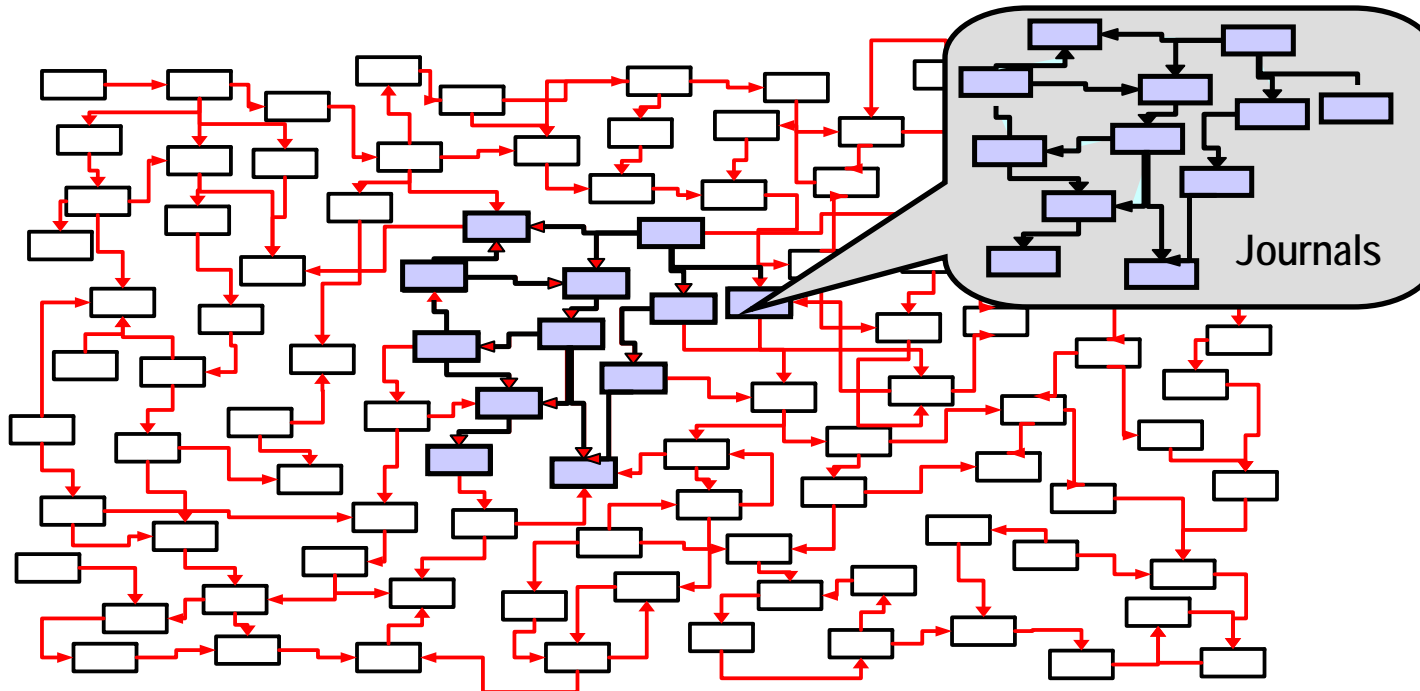
Single, scalable, interoperable EDM solution provides a central point to deploy policies to extract, store, port, and protect application data records from creation to deletion

Optim: Right Data Out



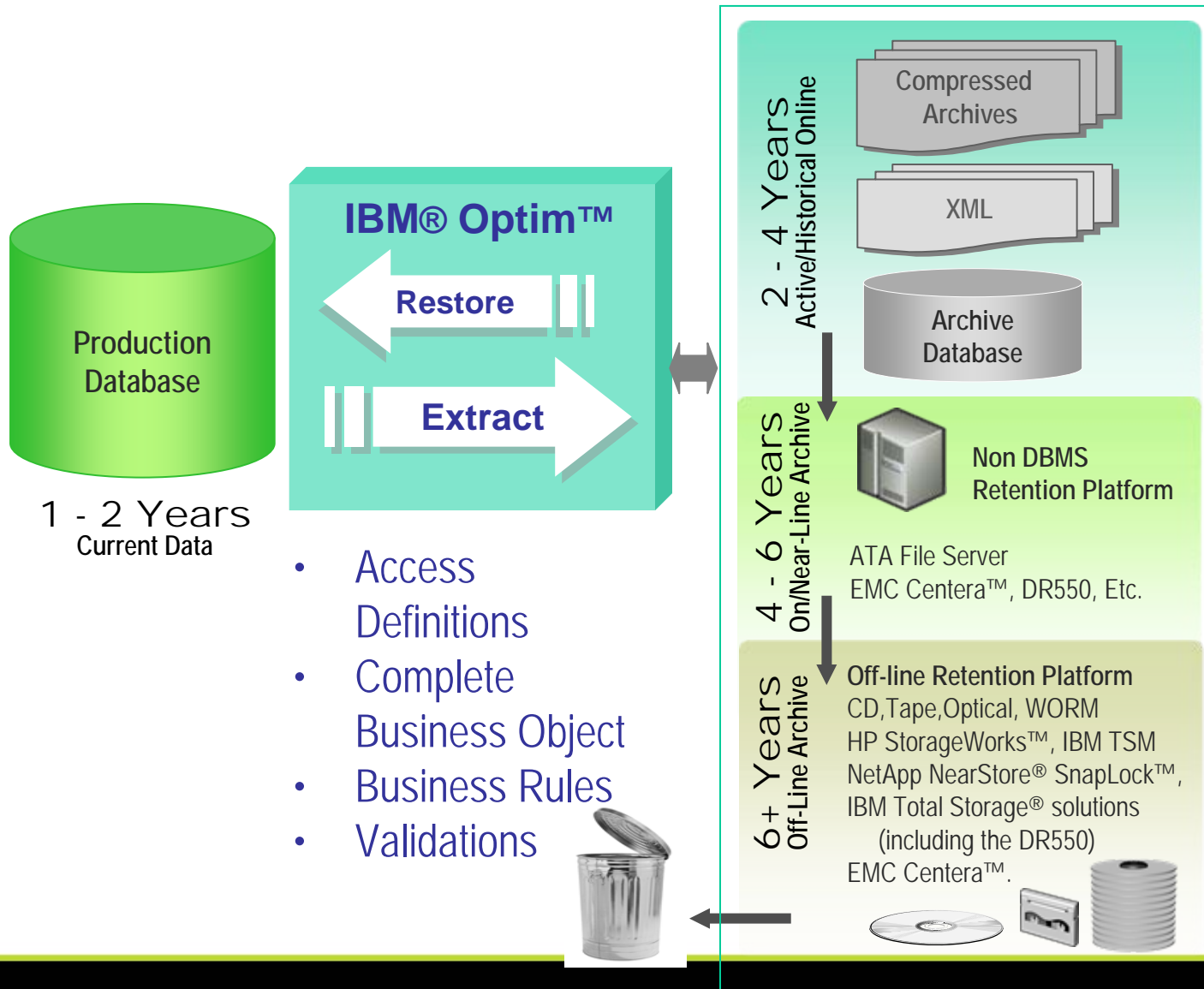
- Access Definitions
- Complete Business Object
- Business Rules
- Validations

Optim: Complete Business Object Support

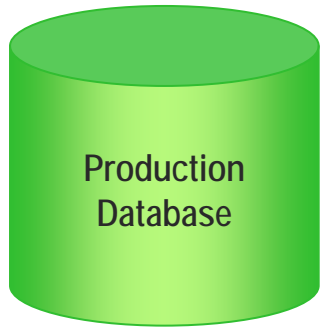


- Complete Business Object provides historical reference snapshot of business activity
- Business Rules and Validations to meet your requirements

Optim: Full Lifecycle Archiving



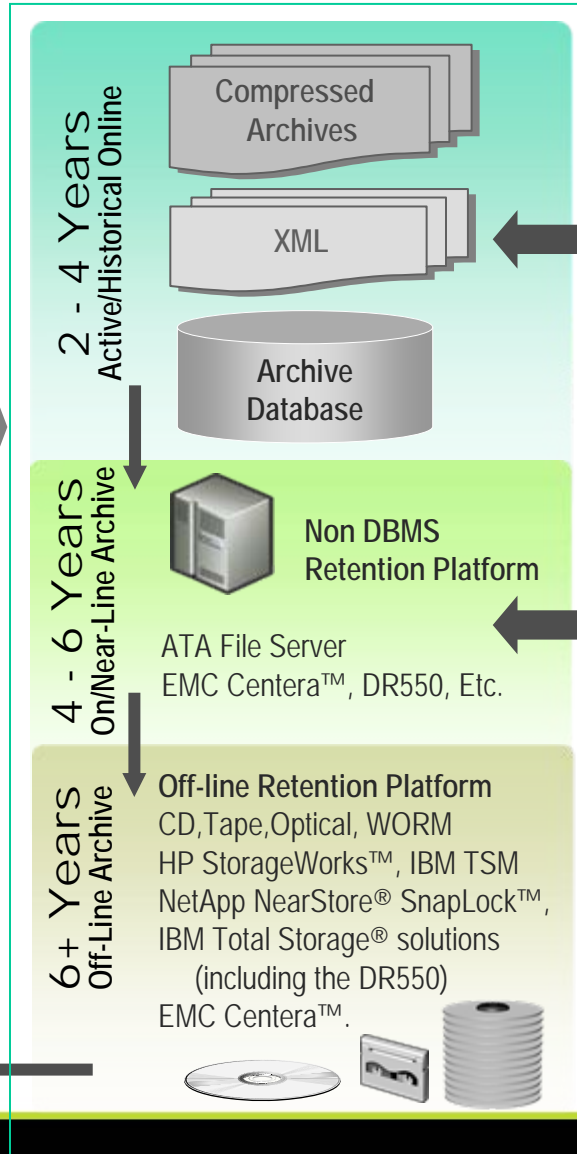
Optim: Universal Access



1 - 2 Years
Current Data



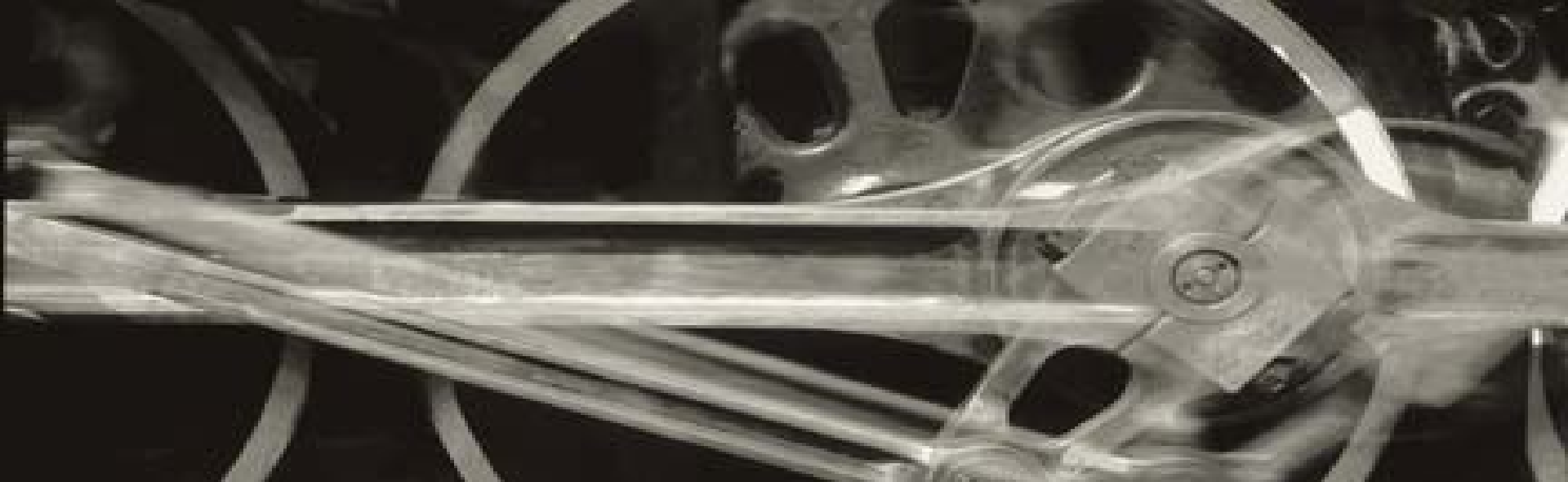
- Access Definitions
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UNIVERSAL ACCESS



- Report Writers**
- Business Objects
 - crystal reports.
 - COGNOS
 - ACTUATE.
 - Discoverer
- ERP Applications**
- PeopleSoft.
 - JDE EDWARDS
 - ORACLE E-BUSINESS SUITE
- Additional Options**
- ODBC / JDBC
 - XML
 - SQL
 - Excel
 - Access



IBM Optim: Leader in Enterprise Data Management



IBM Optim

- Market leading Enterprise Data Management (EDM) Solution and Platform:
 - Data Growth
 - Retention & Discovery
 - Data Privacy
 - Test Data Management
 - Application Upgrades
 - Application Retirement
- Solving complex data management issues since 1989
- 2500+ clients worldwide; c. 50% of Fortune 500
- Princeton Softech acquired by IBM, September 2007



Evolution of Optim Partnership

- 2002 – Oracle Certified Partner
- January 2006: Oracle Consulting partnership to speed deployment of Optim™ enterprise data solution
- Only Oracle partner offering a single, consistent data management solution – validated by Oracle and applicable across entire Oracle stack
 - E-Business Suite, Oracle E-Business Suite, JD Edwards EnterpriseOne, Retek, Siebel
 - All custom and packaged applications running on Oracle databases



Some ERP Archiving Clients



Puerto Rico
Federal Affairs
Administration



Success: Data Growth

About the Client: Toshiba Systems - France
Photocopier Manufacturing, \$2.2 Billion Annually

TOSHIBA

- **Application:**

- Oracle E-Business Suite

- **Challenges:**

- Proactively managing growth of transactional data in Accounting, Sales, and Logistics applications before deploying Oracle E-Business Suite to Nordic countries
- Improve the batch and online performance by archiving historical data to improve service levels
- Improving operational efficiencies for daily operations, administration, routine maintenance and upgrades

- **Solution:**

- Optim Oracle E-Business Suite Solution

- **Client Value:**

- Archived 150 GB of historical data to manage data growth for the BOM, INV, AX, and GL modules and reduced database size by 30%. Plan to implement archiving for OM and AR modules next.
- Reduced time to run 17,000 jobs from 250 hours to 65 hours
- Maintained smaller databases and provided the flexibility for scheduling hundreds of archiving jobs at night and weekends to increase efficiencies for day-to-day operations.

THANK YOU

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