

R12 Upgrade Surprises – What will Catch You Off Guard? ***Updated for 12.2***

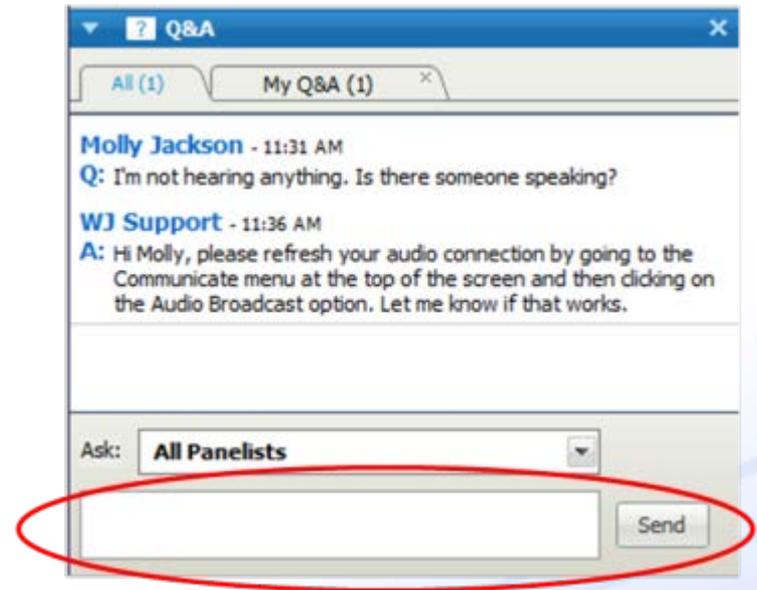
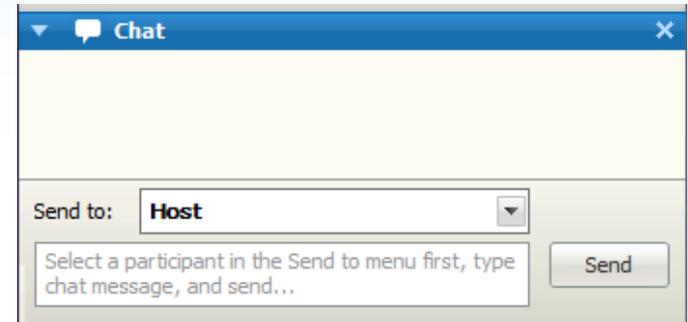
Susan Behn



Webinar Mechanics



- Submit text questions.
- Q&A addressed at the end of the session. Answers will be posted within two weeks on our new LinkedIn Group, EBS Answers:
<http://www.linkedin.com/groups/EBS-Answers-4683349/about>
- Everyone will receive an email within 24 hours with a link to view a recorded version of today's session.
- Polling questions will be presented during the session. If you want CPE credit for this webinar, you must answer all of the polling questions.



Objectives

- **Objective 1:** Understand upgrade surprises at a high level, and learn how to minimize them.
- **Objective 2:** Define what a “technical” upgrade is and what its biggest impacts are.
- **Objective 3:** Find out how to maximize training dollars and keep consulting costs down.

Agenda

- Provide a high level view of upgrade surprises
 - What is a “technical” upgrade?
 - Where are the biggest impacts?
 - Specific Functional Surprises
 - Specific Technical Surprises
 - Training

*e*prentise[®]: Transformation Software for E-Business Suite

Company Overview: Established 2006 • Helene Abrams, CEO

*e*prentise Can...

-  Consolidate Multiple EBS Instances
-  Change Underlying Structures and Configurations
 - Chart of Accounts, Other Flexfields
 - Inventory Organizations
 - Operating Groups, Legal Entities, Ledgers
 - Calendars
 - Costing Methods
-  Resolve Duplicates, Change Sequences, IDs
-  Separate Data

...So Our Customers Can:

-  Reduce Operating Costs and Increase Efficiencies
 - Shared Services
 - Data Centers
-  Adapt to Change
 - Align with New Business Initiatives
 - Mergers, Acquisitions, Divestitures
 - Pattern-Based Strategies
 - Make ERP an Adaptive Technology
-  Avoid a Reimplementation
-  Reduce Complexity and Control Risk
-  Improve Business Continuity, Service Quality and Compliance
-  Establish Data Quality Standards and a Single Source of Truth

Overview

- There are thousands of new features in R12
 - Impact on custom Menus
 - Impact on custom Responsibilities
 - A responsibility can now access data in multiple organizations
 - Quicker data entry for shared services organizations
- R12.1 was released in April 2009
 - 12.0 focused on Financials
 - 12.1 focused on everything else including HR, Manufacturing, Supply Chain
- R12.2 – released in Sept, 2013
 - On line patching
 - Minimum downtime to make the patch edition the new production edition
 - WebLogic middle tier server
 - Manufacturing and Supply Chain Enhancements
 - Minimal Financial and HRMS Enhancements
 - Enhanced User Interface for OAF

FINANCIALS - GL

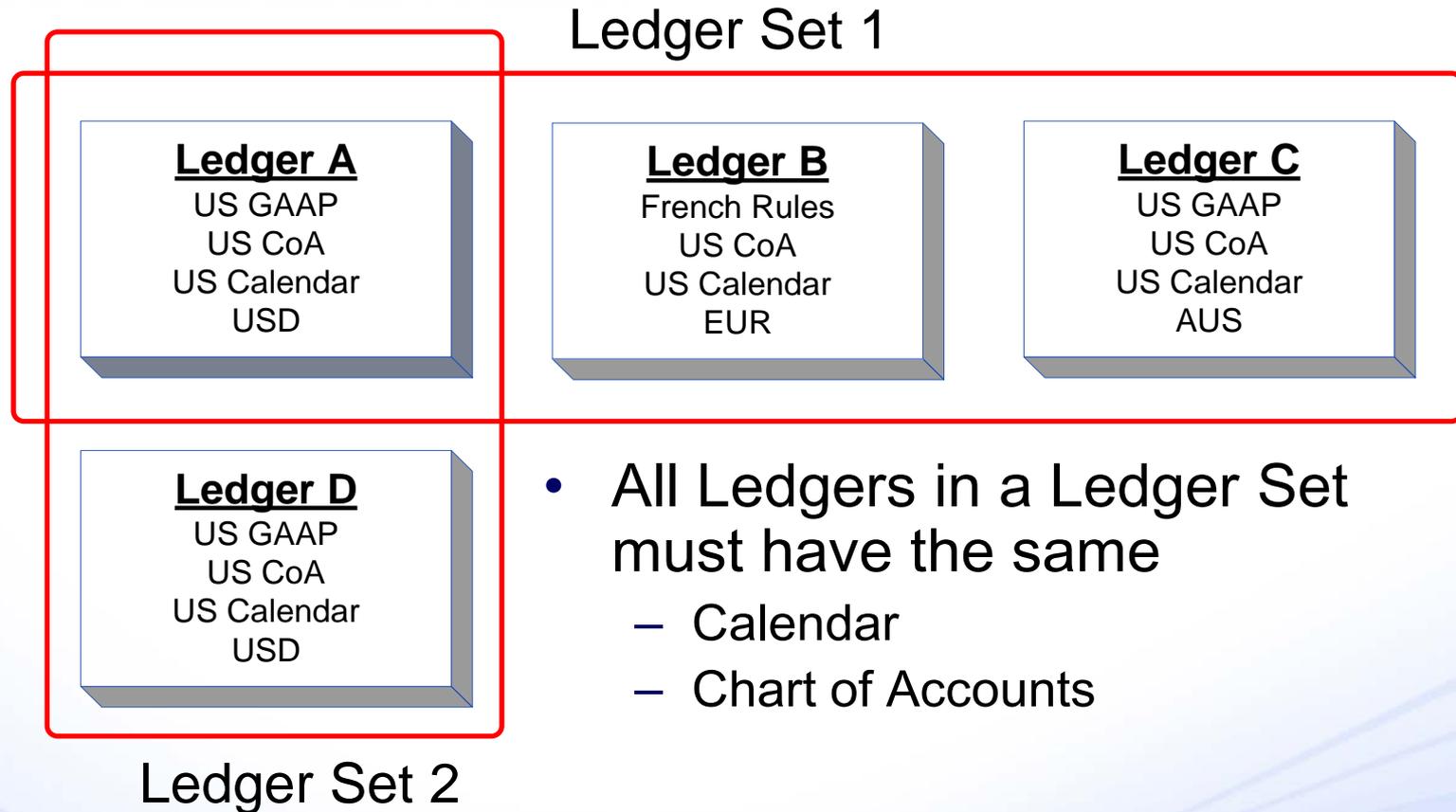
Financials - GL

- Legal Entities have significant functionality in R12
 - Should reflect legal corporate structure
 - Utilized by Accounting Functions, E-Business Tax, Intercompany, and Bank Account
 - Balancing segment is associated with legal entity – not ledger
 - Bank account is owned by legal entity
- Align your Ledger structure with your business plan
 - Operating units are associated with ledgers in R12 – not LE
 - Position your business to accommodate growth
- Design ledgers to satisfy non-GAAP accounting requirements
 - Secondary Ledgers can be utilized for statutory, management, and/or consolidation reporting
 - Mapping from Primary to Secondary Ledger(s) is defined in General Ledger and is assigned in the Accounting Setup Manager

Financials - GL

- Consider required changes to ledgers design to optimize R12 functionality for Foreign Currency Reporting and other enhancements
 - Ledger Sets
 - ▶ All Ledgers in a Ledger Set must have the same Calendar and Chart of Accounts
 - ▶ Functionality across ledger sets can streamline processing - Open/Close Periods, Create Journals, Translate Balances, Reporting, and View Information
 - Improves Data Security, Reliability, and Consistency
 - On upgrade, each Set of Books becomes a Ledger and a Ledger Set composed of one Ledger

Setting up General Ledger



Financials – Web ADI

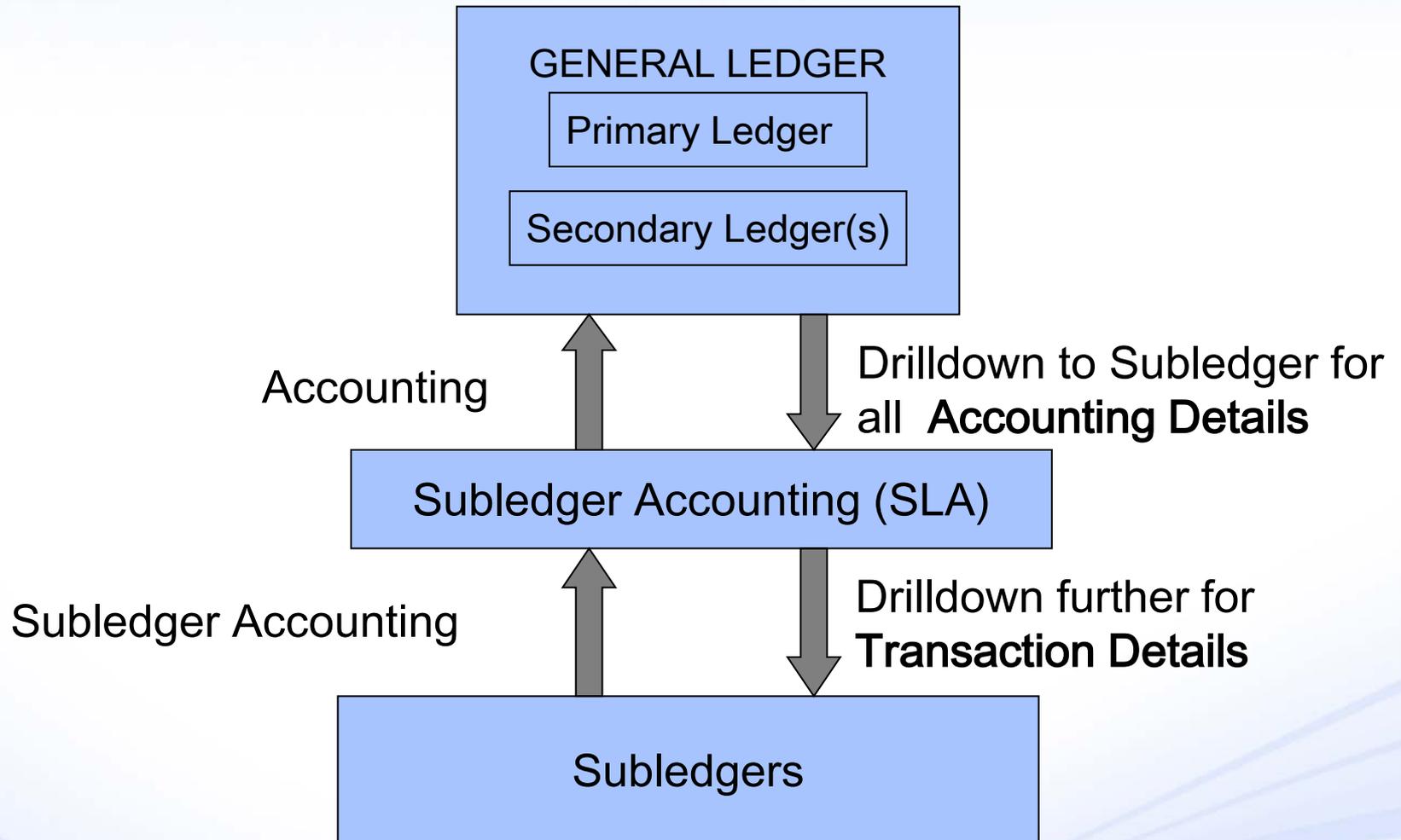
- Web ADI and Report Manager are now separate applications
 - This may require assistance in transitioning to R12
 - Must log in to application to run concurrent requests
- The MRC schema has been eliminated in R12
 - Multiple reporting currency is now handled by setting a reporting currency
 - ▶ Similar to a secondary ledger except currency is the only variable

FINANCIALS – SUBLEDGER ACCOUNTING

Subledger Accounting

- Consider impact of planned change to seeded transaction rules for any of your subledgers
- Bring Account Generator modifications brought into the Subledger Accounting engine only if changes are required
 - Otherwise, recommend this be done as a post upgrade change
- Plan how Subledger Accounting be leveraged going forward
 - Auto accounting still needed for Projects cost distribution, revenue generation, and accounting event generation processes to create default accounts needed during processing
 - Reduce your current extensions by using the Subledger Accounting engine for complex rules or to override auto accounting defaults
- Drilldown from GL will be from GL through SLA to the individual subledger transactions
 - Subledger accounting schema is XLA
 - Post in summary to GL since detail is in XLA
- Transaction codes are obsolete in Federal financials
 - Must replace with SLA rules
- Payroll SLA rules are now provided but may not be sufficient

Subledger Accounting



SLA – Reconciliation Tools

- There is a robust set of reconciliation tools within Subledger Accounting and that there is a new reconciliation process for all sub-ledgers
- Set of Books now called Ledgers and have 4 Cs
 - Chart of Accounts
 - Calendar
 - Currency
 - Subledger Accounting Convention (New in R12)
 - ▶ Six Seeded Subledger Accounting Conventions
 - Accrual with Encumbrance Accounting, Cash with Encumbrance Accounting, Standard Accrual, Standard Cash, US Federal Accounting, and China Standard Accrual

SLA – Upgrade Process

- By default – upgrade will create six months of transactions in SLA
 - To change default at time of upgrade
 - ▶ Apply patch 5233248 to R11i
 - ▶ If using Projects or Grants, also apply 10231107 on R11i
 - ▶ Run “SLA Pre-Upgrade program” concurrent request
 - Use a start date older than 6 months for the start date parameter
 - Upgrade by request
 - ▶ Upgrade historical data at a later time
 - Use this option to reduce downtime window
 - Consider future testing that may be required
 - See appendix in upgrade guide for more details

GL 12.2 Enhancements

- Integration with Fusion Accounting Hub
 - Creates and transfers Fusion journals to record EBS period balances
 - Supports drill-down from Fusion to EBS
- Integration with Data Relationship Management (DRM)
 - Hyperion DRM can store COA values and child-parent relationships regardless of the number of EBS instances or other GL Applications

Poll Question

FINANCIALS – PROCURE TO PAY

Payments

- The user interface for creating payments is an entirely new process in R12
 - Additional configurations are required to produce payments in R12
 - ▶ Payment process profile option defines ou, bank, etc
- Oracle Payments can be configured to support either a decentralized or centralized payment process
 - Payment Process Dashboard
 - Funds Disbursement Dashboard
- R12.2 – Payment acknowledgement import is now available

Payments

- Oracle Payments is now integrated with both Payables (Funds Disbursement) and Receivables (Funds Capture)
 - Improves working capital management
- Oracle Payments can now handle credit card transactions on the funds capture side
 - ▶ Oracle source product creates a transaction
 - ▶ The Payments Engine authorizes the transaction

Funds Capture Source Products

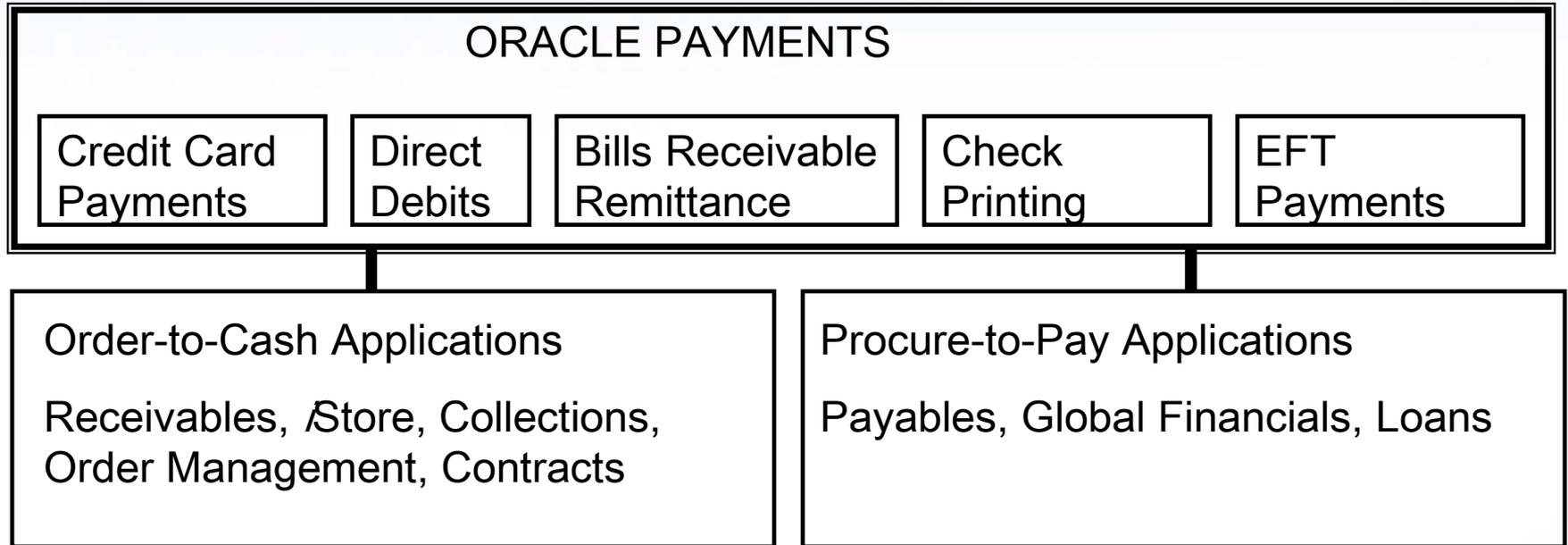
- Payments integrates with the following products to facilitate Funds Capture
 - Collections
 - iReceivables
 - iStore
 - Order Capture
 - Order Management
 - Service
 - Service Contracts
 - Lease Management
 - Receivables
 - Student System

Third Party Payment Systems/Purchase Instruments Supported Out of the Box

- Third Party Payment Systems supported out-of-the-box
- Oracle provides integration for Paymentech, FDS and Concord EFS
 - As of 2/10/2014, only Paymentech is certified with R12
 - No ETA on certification for FDS and Concord EFS
- Verisign/Paypal, Cybersource, Wells Fargo provide their own software integration
- Refer to My Oracle Support Doc. ID: 471385.1

	Credit Card	Purchase Card Level 2	Purchase Card Level 3	Pinless Debit Card	US ACH
Paymentech	●		●	●	●
Concord EFSnet	●		●	●	●
Wells Fargo	●	●			●
First Data (North Platform)	●	●			
CyberSource	●	●			
VeriSign	●	●			

Payment Processing in R12



- Multiple Applications leverage ONE payment processing solution
 - Define templates and validation rules for payment processing
- Payment templates utilize BI Publisher
- iPayments is obsolete in R12

Procure to Pay

- Trading Partners can be shared between Payables and Receivables and across operating units
 - Suppliers and Customers share a TCA Party Record
 - Plan for customer and supplier cleanup prior to upgrade
- Suppliers and Banks forms are now OA Framework forms
 - Allow adequate training time
 - Plan for re-creation of personalizations in OAF
- There is now a lines table for AP Invoices in R12 to match the lines table from the PO
 - Plan for training and impact to interfaces and reporting
 - Do you have DFFs on invoice distributions that should now be on invoice lines?
 - Do you have approval rules based on distributions that should move to lines?

Procure to Pay

- Oracle has redeveloped some major forms for Oracle Procurement
 - Professional Buyer's Work Center
 - ▶ Consolidates procurement responsibilities to single command center
 - ▶ Streamlined workflows
 - ▶ Improved security for shared services organizations
 - ▶ Improved Microsoft Word synchronization
 - ▶ Integration with Oracle Sourcing and Contracts
 - ▶ Personalized Views
- R12 fully supports Contingent Workers
- Catalog now unified for Purchasing and iProcurement
 - Catalogs are combined together in Purchasing
- Integrated with E-Business Tax

Procure to Pay

- There is more support for complex goods and services in R12
 - Improved alignment between finance and procurement to monitor supplier performance
 - Better control of payment for complex services
- Services Procurement now supports progress payments including rate, lump sum and milestone pay items
- Services Procurement fully supports retainage
 - Capture Retainage Rate and Maximum Retainage Amount on the contract
 - Retainage rate applied to all standard invoices until max is reached
- Consider if Services Procurement is needed to support contract delivery services for contingent workers

R12.2 Procurement Enhancements – Slide 1 of 2

- **Can now see item master attachments in item search and detail pages**
- iSupplier
 - Can view/edit E-Kanbans on portal
 - Additional supplier contact details
 - ▶ URL, Alternate Name, Alternate Area Code, Alternate phone extensions
- Contracts
 - UDAs for Repository Contracts, Deliverables
 - **MS Word 2010 Certification**
 - Contract Expert Performance Improvements

R12.2 Procurement Enhancements - Slide 2 of 2

- Sourcing
 - Buyers can add req lines to a draft negotiation
 - Suppliers can withdraw response
 - **Activities page has a chronological log of activities**
 - Buyer can award different lines at different points in time
 - Import of Price Breaks from spreadsheet
 - Can define negative cost factors
 - **Sourcing APIs to create RFIs, RFQs and Auctions**

CASH MANAGEMENT

Cash Management

- Cash Management setup is required to manage internal banks
 - The Cash Management application now maintains internal banks and bank accounts
 - ▶ Reminder: Bank accounts are owned by the legal entity
- Document sequencing of payments has moved to the Cash Management bank account setup
- Cash Management now supports Cash Pooling without buying Treasury

Cash Management

- Bank accounts are shared by multiple applications (AP, AR, Payroll)
- Bank accounts are stored in the TCA architecture and can be shared across operating units
- Banks are merged upon upgrade if the following attributes match
 - ▶ Bank number
 - ▶ Institution type
 - ▶ Country
 - ▶ Bank admin email
 - ▶ Tax payer ID
 - ▶ Tax reference number
 - ▶ Description, Effective dates
- No 12.2 enhancements

E-BUSINESS TAX

E-Business Tax

- E-Business Tax setup is required
 - Minimal setup for geographies required for AR
- Provides global control and is a single source for all taxes
- Utilizes centrally defined rules, rates, and jurisdiction
- Uses a rules engine for complex tax rules
- Use Taxes can be fully automated
- Setup time for tax calculation can be significant – plan for adequate time and engage an expert here

E-Business Tax

- Foreign taxes and the currency for those taxes is now supported
- There is a Tax Simulator engine to provide “what if” scenarios to validate tax calculations
- A central tax repository provides a reportable audit trail
 - Schema is ZX
- Tax rules based on 4Ps
 - Party - legal entity
 - Product – goods or service
 - Process – accounting event
 - Place – geographic jurisdiction

E-Business Tax

- 12.2 Enhancements
 - Customer interface can import Party Tax Profile, Tax Registrations, Exemptions and Reporting Code Association
 - Enhanced reporting for EMEA
 - India – can import legacy application imputed tax or use Financials for India to calculate taxes for AR and AP transactions

Poll Question

RECEIVABLES & COLLECTIONS

Receivables

- There is a new refund feature in R12
 - This eliminates a common customization
- R12 contains automatic netting functionality between Receivables and Payables at the Party level
 - AR Customer Supplier Netting Report is no longer needed
 - 12.2 includes scheduling of AP/AR netting process
- Some of the collection functionality is no longer included in Receivables
 - Oracle Advanced Collections replaces collections workbench
 - ▶ Account details and activities forms are still available in AR for non-collectors (for research purposes)
 - ▶ Dunning letters are now improved XML publisher reports through advanced collections
 - ▶ See My Oracle Support Doc ID: 389443.1 for more details
- The Customer forms are now OA Framework forms
 - Plan for training and re-creating of personalizations in OAF

Receivables

- COGS and Revenue Matching Report is replaced by COGS and Revenue Matching Feature
 - Automatically recognizes COGS when revenue is recognized
 - In 11i, report provided information to create manual JEs to correct revenue recognition
- Backward-compatible views RA_CUSTOMERS and RA_ADDRESSES are no longer available
 - ▶ Extensions should reference TCA tables
- On Account Credit Memo Refund
 - Direct integration to AP eliminates creation of negative miscellaneous receipt

Receivables

■ Tax setup and reporting in AR are replaced by EBS Tax

• **No longer in Receivables:**

- Tax Code Listing
- Tax Exceptions Listing
- Tax Exempt Customer report
- Tax Exempt Product Report
- Tax Group Listing Report
- Sales Tax Listing
- Sales Tax Rate Interface
- TAX: Setup Verification Report
- Tax Partner: AR Effective Tax Rate Update

• **Supported in E-Business Tax:**

- Financial Tax Register
- Tax Received Report
- Tax Reconciliation Report
- Tax Register
- Tax-only: open invoices report
- US Sales Tax report for tax partners

Advanced Collections – Key New Features

- Bankruptcy status at customer level so all transactions are managed accordingly
 - Prior to R12 – had to mark individual transactions
- Collection strategies can be different for OU, groups of customers or specific customers
- 12.2 – Can put a collection strategy on hold

Summary of Financials 12.2 Enhancements - Slide 1 of 3

- Adv Collections – place hold on collections strategy
- Tax
 - Customer Tax Information Import
 - Null/Not Null operators added for tax rules
- Common Modules – scheduling of AP/AR netting
- EMEA – enhanced tax reporting; Italian JE report
- Brazilian fiscal code of operations and services code derivation and defaulting
- India
 - Enhanced Bill of Entry Functionality
 - Tax import to AR and AP
 - Performance improvements for Creditors Ledger Reports

Summary of Financials 12.2 Enhancements - Slide 2 of 3

- General Ledger
 - Integration with Fusion Accounting Hub
 - Integration with Data Relationship Management
- iReceivables – Registration history page and payment audit history page
- Oracle Loans – supports changes in repayment frequency of principal and interest
- Payments – Payment Acknowledgement Import
- Receivables
 - Review and manage accounting exceptions during close
 - Automate auto lockbox processing
 - Assign customers to unidentified receipts using API

Summary of Financials 12.2 Enhancements - Slide 3 of 3

- Federal Financials
 - Common Govt-wide Accounting Classification (GFAC) configuration
 - Govt-wide Treasury Account Symbol Adjusted Trial Balance System (GTAS) processing
 - Enhanced Intra-Govt Payment and Collection (IPAC) processing
- Tax and legal updates for Brazil, Israel, Portugal, Spain, UK, China, India, Russia
- US Federal Federal Agencies' Centralized Trial Balance System (FACTS II) edits
- Property Manager – override variable rent calculations

SUPPLY CHAIN AND MANUFACTURING

Supply Chain & Manufacturing

- The new Oracle Manufacturing Execution System (MES) provides new dashboard controls over the shop floor activities
 - Dashboard controls similar to the same look as the Professional Buyers Workbench
- Oracle Inventory serves both Discrete and Process Manufacturing – consider impact on the following functionality
 - Product Development Workbench
 - Formula Management
 - Routings
 - Operations
 - Recipe Management
 - Technical Data
 - Simulator
 - BOM
 - Mass Search and Replace
 - Product Development Workflow
 - Process Execution

New Features – Inventory

- Dual UOM control for process mfg
 - Previously only supported for discrete mfg
 - Now moved to inventory which is now converged to support discrete and process mfg
- Advanced lot control
 - Sublot control now in inventory
 - New Lot Expiry Proc Workflow
 - ▶ Notification email if lot or serial approaches milestone date approaches
- Genealogy Form provides history and other information on the lot
- Material Status
 - Previously only available in WMS – now in inventory
 - Material status provides control of specific transactions which may be allowed or disallowed based on material status

R12.2 New Features - Inventory

- **Enhanced inventory allocation rules**
 - Can now pick based on lot num, item revision, subinventory, stock locator, lot expiration/creation date, or specific customer rules
- **Optional Lot Allocation**
 - Allows the picker to choose the lot based on accessibility and then confirm the lot at pick confirmation
- **Serial Number Assignment Enhancements**
 - Can receive and transfer without serial num and assign the serial num later in the process if serial control is set to “At Sales Order Issue” or “No Serial Control”
 - ▶ Does not apply if set to “At Receipt”
- **Return to Vendor Enhancements**
 - Improved management of outbound shipments associated with returns which allows AR to track the entire shipment cycle of returns
- **Global Lot Attributes** – new profile allows lot to retain it’s attributes as it traverses through the supply chain

R12.2 New Features - Inventory

- Deferred Electronic Record/Electronic Signature
 - Defer a material status change until approved
- **Cycle Counting Enhancements**
 - ABC compile criteria includes item unit cost
 - Public API for ABC assignment
- **More Public APIs** - Unit of Measure, UOM Class, UOM Conversion, Physical Inventory for updating tag records and adjustments
- Receiving Open Interface Enhancement
 - Transaction Status Summary form allows user to query, resubmit, delete open interface transactions
 - ▶ Can also delete “pending” or “running” transactions

R12.2 Warehouse Management New Features

- **Distributed Warehouse Mgmt Integration**
 - Certified integration for WMS in a separate instance
- Mobile User Interface Personalization Pages available for more WMS Mobile Pages
- **Contingent Worker Support ***Can back port to 12.1.3**
- Mobile Logout Warning
- Task Mgmt usability Enhancements
 - Do not have to reconfirm accounts for a move order issue transaction
 - Enter discrepancy reason from pre-populated list for locator overrides
 - If lot is substituted, the LPN will be defaulted as the Transfer LPN
 - During cycle counts, automatically goes to next task rather than back to menu

R12.2 Warehouse Management New Features

- License Plate Number (LPN) Visibility in Receiving
 - Shows inspection transaction/results at the shipment line or LPN rather than by serial
- **Extensibility Enhancements**
 - Better functionality for adding specific validations
 - Better control over what labels to print
- **Warehouse Control Board and Material Workbench Enhancements**
 - Accommodates material that has been picked from LPNs and loaded for tasks but not yet dropped to the destination
 - ▶ **Provides real time on-hand and availability**
 - Warehouse Control Board shows more detail for exceptions
- Packing Workbench supports lot attributes entry

R12.2 Enhancements – Discrete Mfg

- **Oracle Electronic Kanban – New Product for just in time schedule**
- ODI based Data Integration Platform
- Recalculation
- Error Reprocessing
- Asset Performance Dashboard
- Production Supervisor Dashboard
- **Support for Oracle Business Intelligence Mobile**
- Enhanced Serialized Mfg
- **Manufacturing Execution System Enhancements**
 - MES Operator Workstation Enhancements
 - MES UI Configurability Enhancements
 - MES Custom Extension User Exits

R12.2 Enhancements – Process Mfg

■ **Advanced Catch-Weight**

- Supports issues particularly in the food industry where companies cost and invoice by weight but sell by unit
- See white paper
 - ▶ Advanced Catch-Weight Solution in Oracle E-Business Suite Applications MOS ID: 1551171.1

R12.2 Enhancements in Order Management

- Assemble-To-Order (ATO) items are supported as included/mandatory items in PTO models or kits
 - New Profile options – Set to Yes
 - ▶ “OM: Allow Standard ATO Items as PTO/Kit Included Components”
 - ▶ “BOM: Allow ATO item in a KIT or as mandatory in a PTO Model”
- Order Information Panel (OIP) Enhancements
 - Bill To Customer can view and track sales orders
 - External users can subscribe to receive notifications on key events
 - Integrated with FND Security to enable rules based access to summary and detail views
 - New search parameters
 - More display fields on both summary and detail views
- **Tax Calculation on Freight Charges**
- Credit check holds can be prevented from being reapplied

R12.2 Enhancements in Order Management

- **Can decide to place credit hold based on Bill To Customer credit hold**
- Selling Services Enhancements
- “Extended Warranty” can be defined as Promotional Goods
- User Defined Attributes (UDAs) in Order Mgmt
- Scheduling Enhancements

R12.2 Enhancements in Order Management

- **Support for Advanced Catch-Weight**
- **Integration with AME for Quotes, Sales Agreements and Returns**
- **Can reverse a prior credit card authorization and execute a new authorization**
- **OM Productivity Enhancements (partial list)**
 - Additional Hold Source Attributes for Item Category, End Customer and End Customer Number
 - Specify who gets credit check hold notifications
 - Allow users with view only access to apply/release holds
 - Search by hold name
 - Search by PO Release number

HRMS and Payroll 12.2 Enhancements

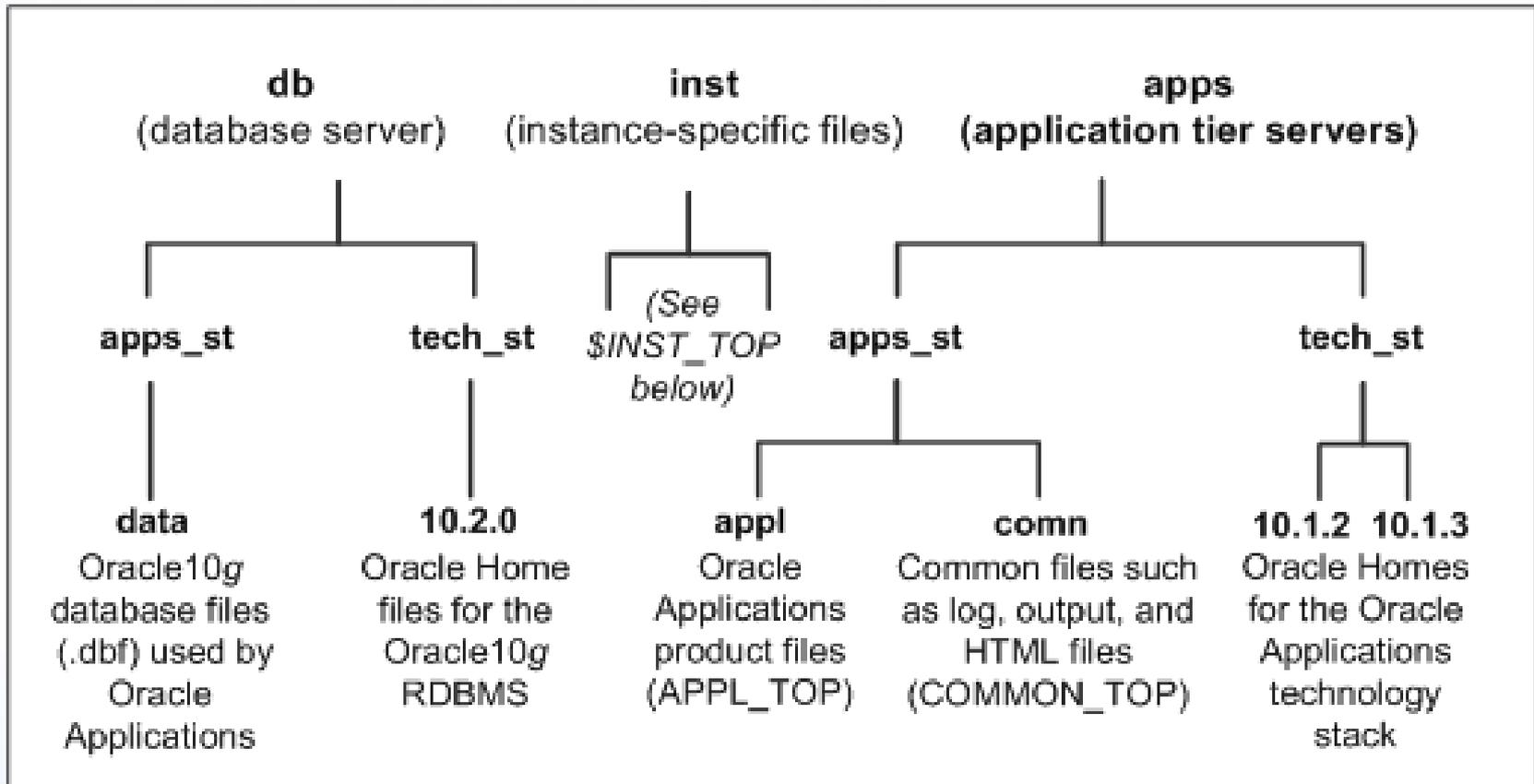
- **Workflow synchronization**
 - Synchronize WF Local Tables is finally obsolete
- Update records with future person changes
- iRecruitment – can now create a vacancy with multiple locations
- **Payroll Enhanced Retro Pay is supported**
 - Retro by element, Aggregate and Run is no longer supported
- Performance management now uses star ratings for performance and proficiency ratings
- OTL
 - New project layouts for actual costing
 - Attachments in timecards are support
 - Checkbox to confirm time entry accuracy

DATABASE AND ARCHITECTURE

Database and Architecture

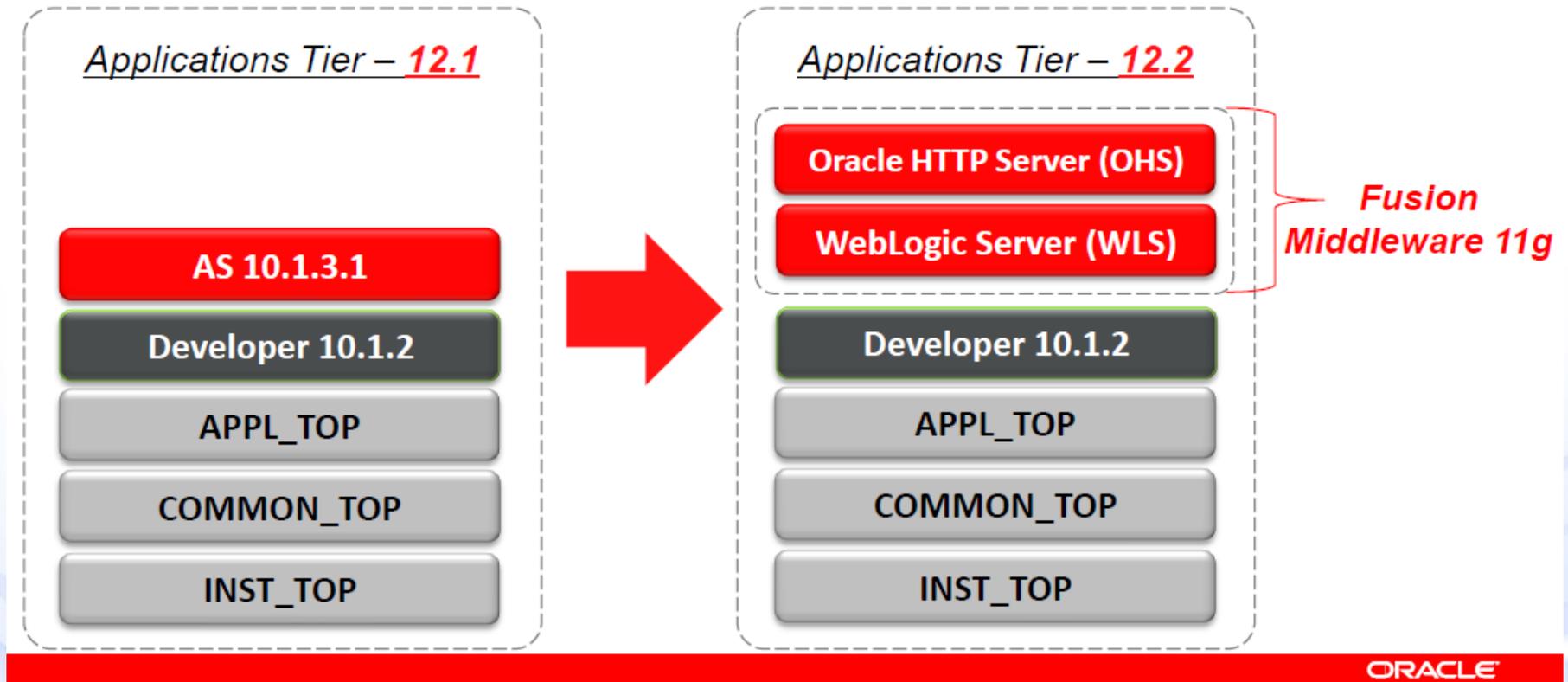
- Increased disk space and performance requirements for R12
 - Plan for 30% more disk space
 - Plan for different tuning parameters due to more java
- Can the redesigned Oracle iSetup application be used to help load data into your R12 environment
- Modified file directory structure for R12
 - Consider impact on interfaces and training
- Are you ready for the changes at the Java level for R12
 - Have you considered the rollout of the new SUN JRE Plugin utilized by R12

R12.1 Application File Structure



EBS Architecture 12.1 vs 12.2

- Ten Things You Can Do Today to Prepare for Oracle E-Business Suite 12.2 – Download this paper from Nadia Bendjedou and Kevin Hudson, Oracle



Database and Architecture

- OATM is required for R12
 - Consider if there is value in implementing OATM prior to upgrade
 - ▶ R12 will do a re-org of database anyway so may not buy much (varies by organization)
- You may need to consider a database upgrade with R12
 - R12 is certified for recent releases of 11g which is recommended
 - ▶ Consider upgrading the database prior to the R12 upgrade to save time during the downtime window
- Single Sign-On is sun-setted and not certified for 12.2
 - Move to Oracle access manager
 - ▶ Consider making this transition prior to upgrade

Poll Question

CUSTOMIZATIONS, EXTENSIONS AND THIRD PARTY PRODUCTS

WRICEP & Third Party Products

- WRICEP – Workflows, Reports, Integrations, Conversion, Extensions, Personalizations
 - Also referred to as CEMLI
- Perform a gap analysis of your current extensions/customizations against standard functionality in R12 to eliminate or simplify extensions/customizations
- Confirm third party products are certified with R12
- In North America, Oracle will provide a free CEMLI analysis
 - See Nadia's presentation mentioned earlier

New requirements for 12.2

- Download and run the Online Patching Readiness report
 - See MOS Doc Id: 1531121.1 for download and instruction
 - Identifies database components that must be changed due to violation of coding standards
- **12.2** – Key SQL change required
 - Do not refer to base tables; refer to synonyms
 - Instead of AP.<table name>, use APPS.<synonym>
 - ▶ This is required for editioning to support minimum downtime patching

12.2 Coding Standards

Coding Standard	Where to find details in Developer Guide
VPD policies must be defined on a Table's Editioning View or Table Synonym, and not directly on the Table.	see: <i>Oracle Database Security Guide 11g Release 2 (11.2)</i>
Table names must not use the '#' character.	Table (Ordinary), page 7-10
Table must be owned by an Oracle E-Business Suite product schema, not APPS.	Table (Ordinary), page 7-10
Base Column Name may only use '#' as last character.	Table (Ordinary), page 7-10
Base Column Name should be 28 bytes or fewer.	Table (Ordinary), page 7-10
Column Type must be a built-in type or a user-defined type owned by a non-editioned user.	Table (Ordinary), page 7-10
Column Type must not be LONG or LONG RAW.	Table (Ordinary), page 7-10
Column Type should not be ROWID.	Table (Ordinary), page 7-10
Query/DML statements must access Tables via the Table Synonym or Editioning View.	Table (Ordinary), page 7-10
Do not modify application-managed tables in an Online Patch.	Table (Ordinary), page 7-10
Patch the table definition using ODF or XDF.	Table (Ordinary), page 7-10
Index Name must contain an underscore ('_').	Index, page 7-22
Deliver constraint definition using ODF or XDF.	Integrity Constraint, page 7- 23
Deliver Materialized View using XDF.	Materialized View (MV), page 7-24

Technology Recommendation

- Oracle recommends that E-Business Suite customers follow a similar path that Oracle took with E-Business in regards to the use of development tools for upgrades of extensions.
 - Upgrade existing forms to the latest version of forms and reports – 10g for R12 or OAF
 - Build any new forms applications in OAF
 - Utilize XML Publisher for reporting
 - ▶ Most reports have both data definitions and data templates in XML publisher by R12.2
 - ▶ Check on licensing requirements for XML Publisher
 - ▶ XML Publisher can have problems with large amounts of data in older versions
 - Not seeing this issue in 12.1.3

OA Framework Forms

- Oracle has redeveloped major forms in Java (Oracle Applications Framework)
 - Some of your personalizations will need to be redeveloped
 - ▶ Any personalizations where the forms technology changed from professional form to an OA Framework form
 - Customer form
 - Supplier form
 - Bank forms
 - OA Framework personalizations are significantly more limited than professional forms personalizations
 - ▶ Personalizations
 - Refer to the Oracle Application Framework Personalization Guide
 - ▶ OA Framework extensions which require Jdeveloper modifications
 - Refer to My Oracle Support Doc ID: 744832.1 - Oracle Application Framework Developer Guide

R12 Professional forms

- Professional Forms have been upgraded from 6i to 10g
 - The 10g developer suite includes a Forms Migration Assistant which will upgrade typically 80% of the functionality and identify obsolete features
 - ▶ These obsolete features will be identified by the migration tool but must be resolved manually
 - ▶ Obsolete features document for 9i which also applies to 10g
 - http://www.oracle.com/technology/products/forms/pdf/forms_upgrade_reference.pdf
- If EBS seeded forms were customized, any table changes must be corrected
- Note: Oracle does not plan on eliminating professional forms
 - They are ideal for workbenches

R12 Reports

- Many reports in R12.1 are published using BI Publisher
- Upgrade process
 - Seeded report customizations
 - ▶ copy the R12 version of the report to your custom report name and perform the necessary changes
 - ▶ For formatting changes, create a new XML publisher template and associate the new template with the new custom version of the report
 - Custom reports built from scratch
 - ▶ Recompile in Reports 10g
 - ▶ Remove deprecated or obsolete functionality
 - http://www.oracle.com/technology/products/reports/10gr2/Reports_guide_to_changed_functionality.pdf
 - ▶ Correct for any EBS table changes

Table Changes

- Learn about database changes to prepare for reporting updates
 - [AP Tables](#) [AP Views](#)
- The EBS Data Model Comparison Report provides the database object definition changes between two EBS releases
 - See [Doc ID 1290886.1](#)
- Watch a [4-minute overview video on this report \(04:02\)](#)
 - ▶ (Sign in to My Oracle Support to access the video.)
- The EBS ATG Seed Data Comparison Report provides information about seed data (based on ATG loader control files) changes between two EBS releases
 - See [Doc Id 1327399.1](#)
 - Watch a [7-minute overview video on this report \(07:09\)](#)
 - ▶ (Sign in to My Oracle Support to access the video.)

Available Data Model Comparison Reports

Applicable Releases	Release Pair(s)
Release 12.1.3	<ul style="list-style-type: none">•Release 11.5.9 to Release 12.1.3 (zip)•Release 11.5.10.2 to Release 12.1.3 (zip)•Release 12.0.4 to Release 12.1.3 (zip)•Release 12.0.6 to Release 12.1.3 (zip)•Release 12.1.1 to Release 12.1.3 (zip)•Release 12.1.2 to Release 12.1.3 (zip)
Release 12.2.2	<ul style="list-style-type: none">•Release 11.5.10.2 Minimum Baseline (11iMBL) to Release 12.2.2 (zip)•Release 12.0.6 to Release 12.2.2 (zip)•Release 12.1.3 to Release 12.2.2 (zip)
Release 12.2.3	<ul style="list-style-type: none">•Release 11.5.10.2 Minimum Baseline (11iMBL) to Release 12.2.3 (zip)•Release 12.0.6 to Release 12.2.3 (zip)•Release 12.1.3 to Release 12.2.3 (zip)•Release 12.2.2 to Release 12.2.3 (zip)

Impact of Multi-Org on Extensions

- Customizations which filter data by operating unit must be checked
- Virtual Private Database (VPD) feature will replace usage of CLIENT_INFO(Org Context) function in new Multi-Org Architecture

- Release 11i script to access specific operating unit data

```
begin
  dbms_application_info.set_client_info('&org_id');
end;
/
select * from po_headers
/
```



- R12 must request access through Security Policy in the database

```
begin
  mo_global.set_policy_context('S', &org_id);
end;
/
select * from po_headers
/
```



Impact of Multi-Org on Extensions

- Check programs where concurrent program definition has been customized or new definitions
- New column MULTI_ORG_CATEGORY added to table FND_CONCURRENT_PROGRAMS
 - value is null on upgrade and concurrent program may not run correctly
- After upgrade, assign one of the following values
 - 'S' = Single Org
 - 'M' = Multi Org
- Example script to set value

```
UPDATE FND_CONCURRENT_PROGRAMS  
SET MULTI_ORG_CATEGORY = {'S' or 'M'}  
WHERE CONCURRENT_PROGRAM_NAME = '{Program Name}'
```

Integration Repository (iRep)

- iRep describes the Oracle endpoints - Business to Business (B2B) or Application to Application (A2A)
- Interface types in iREP
 - PL/SQL
 - Concurrent Programs
 - Open Interfaces
 - Interface Views
 - Electronic Data Interchange (EDI) Message Transactions
 - XML Gateway Message Maps
 - Java Methods

WORKFLOW AND FUSION MIDDLEWARE

Workflow & Fusion Middleware

- What role does BPEL play when compared to Workflow
- Should you continue to invest in Workflow customizations
- What about Oracle Alerts – do they continue to function in R12 Should they be redeveloped in BPEL or Workflow
- Are there any new Workflow diagnostics for R12

TRAINING

Training

- How will your functional users be trained on the new navigation and processes in R12
- Do you have a training plan for your technical team
 - Technical application support training
 - JDeveloper
 - OA Framework
 - Personalizations
 - R12 directory structure
 - 11g database
 - XML publisher

Summary

- R12 is full of features
- The R12 upgrade process is better than previous upgrades
- 11i to 12 cannot be compared to a dot release for 11i
- Do not under estimate the time needed for:
 - Planning
 - Testing
 - Training



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- For more information, check out our web site at www.Infosemantics.com
 - R12.1.3, R12.2, OBIEE public vision instances
 - Posted presentations on functional and technical topics

Questions? Comments

Thank You!!!



Susan.behn@Infosemantics.com