ConfigSnapshot

from Rookery Software

*The most **comprehensive** & **flexible** configuration management software available for the E-Business Suite*

ConfigSnapshot Upgrade Benefits

Overview

Effective management of Oracle E-Business Suite setup is essential and during upgrades there are particular challenges that organisations must overcome to ensure a successful upgrade project. The complexity of the Oracle E-Business Suite, from both functional and technical perspectives, makes this a time consuming and costly process – and one that is highly prone to human error.

ConfigSnapshot is able to address exactly these types of issue. An easy to use application that dramatically reduces the time required for such tasks, increases their accuracy, minimises the risks usually associated with them and helps ensure tasks are accurately repeated for each iteration of the upgrade process.

Features include

- Automatically create setup documentation - flexible formats and content including BR100 style
- Directly compare multiple environments, showing all fields or a summary of the differences
- Compare operating units, sets of books etc. within an environment and across environments
- Compare setup across different versions
- Create date stamped copies of setup (baselines) enabling historic reporting and comparison over time
- Differentiate implementation and seeded data
- Target data effectively using flexible filters
- Plan setups before entering in the E-Business Suite
- Customisation identification and impact analysis
- Reports showing the cumulative effect of security settings and how they are affected by the upgrade

Customisation Identification / Analysis

Most E-Business Suite systems include customisations that may be affected by database changes during the upgrade. These must be identified and assessed whether they will be retained and, if so, whether development work will be required to ensure they continue to work correctly.

The scope of potential customisation is broad and all areas should be considered. In addition to custom database objects (tables, views, triggers etc.) and custom programs (concurrent programs, forms etc.) it is key to include any setups that incorporate code elements in their definitions, e.g. table validated value sets. These setups are at risk if the underlying objects they reference are modified.

ConfigSnapshot is able to identify existing customisations and present them in an easy to understand format enabling project teams to assess whether each individual customisation should be retained after the upgrade. This allows a comprehensive test plan for customisation areas to be established early in the project.

Further, ConfigSnapshot is able to determine the likely impact of the upgrade on each retained customisation showing each affected object referenced in the code and highlighting in the code itself each instance of the object. The impacted objects are then summarised and presented in a document outlining how they should be amended to function correctly in the upgraded version. This enables teams to scope and plan the work required much earlier than if they were manually checking each code item; saving significant time and reducing the risk that the work required greatly exceeds any initial estimate.

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Effect On Setups

There are several possible effects on application setups during the upgrade process; these include:

- Existing implementation setups are modified or lost during the upgrade. For example, custom concurrent programs in a seeded request group may be lost if Oracle replaces the seeded request group with an updated definition.
- Seeded data will be modified which may have an effect on the associated business process and new seeded data may also need to be considered.
- Oracle will automatically create new setups in R12 based on existing implementation specific setups in 11i. For example, the new E-Tax model will be generated based on setups in several 11i modules.

ConfigSnapshot enables you to do a direct comparison of application setups as they were in 11i and as they are now set in R12; allowing any changes or additions to be easily understood. Teams can quickly determine what actions are required to deal with any unexpected effects and to plan effectively based on other changes.

Effect On Security

Special attention should be placed on the effect of the upgrade on security access within the application. The introduction of new forms, functions and concurrent programs and the associated effects on menu structures and permissions can lead to users automatically gaining access to functionality that should be controlled.

ConfigSnapshot includes several reporting options to enable project teams to identify all new components to determine which require control and which users have inherited access to these components during the upgrade process.

Managing Additional Configuration

Further setup changes will be required after the completion of the automatic upgrade process. These must be managed to ensure that they are correctly repeated during each iteration of the upgrade.

ConfigSnapshot provides several features to simplify this process and to reduce the risk of error, including:

- Automatic documentation of existing setup allows teams to base decisions on accurate information without the need to document manually
- Ability to plan new setups directly in ConfigSnapshot prior to entering them in the E-Business Suite rather than using static manual documents. Teams can report flexibly on planned setups and also compare setups in

the E-Business Suite directly to planned setups ensuring they are completed correctly.
- Record all setup changes made to the upgraded environment removing the duplication of effort associated with manally maintaining setup documentation. This also provides a clear recipe of actions to be followed during each iteration.

Managing Multiple Iterations

One of the key challenges to upgrade projects is the ability to accurately repeat all required steps for each iteration. A missed step could have serious consequences to the success of the project. As well as the benefits described above ConfigSnapshot enables you to directly compare the setups of each iteration of the upgrade process quickly identifying any differences. The project team can assess whether any difference is expected or whether it indicates a step has not be completed correctly during a particular iteration and the action required to resolve the issue.

Managing Testing

Close control of the testing cycles of the upgrade are key to its success. ConfigSnapshot can help mitigate the causes of typical issues that can arise during this phase.

One of the most common issues during testing is that the test environment was not correctly configured based on work done in the development instance. ConfigSnapshot's comparison capabilities prevent this from being an issue as the test environment can be cross checked against the development environment prior to the start of testing.

A second issue is that unexpected changes are made to the test environment causing errors. These can be difficult to track down and can put significant risk on the project. ConfigSnapshot's capability to identify changes over time can highlight modifications to the setup during the testing process allowing mistakes to be identified and corrected.

Production Upgrade Quality Assurance

One of the biggest challenges for upgrades is that the Production upgrade iteration is usually carried out in restricted circumstances to minimise the system downtime; resources carrying out tasks often do so working long shifts and at unsociable hours. This increases the risk of mistakes being made. Generally, however, there is no opportunity to do comprehensive checks on the Production environment once all the planned tasks have been completed. Using ConfigSnapshot the Production setups and amended customisations can be compared directly against the previous tested iteration to determine that they are correct.

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