

SROAUG NEWS

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Southwest Regional Oracle Applications Users Group
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Board of Directors Update

By Deborah Emmett, Newsletter Director
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October 12th SROAUG Conference

Our final conference of 2007 will be held on October 12th at the Hilton Irvine/Orange County Airport. This full day format event is being sponsored by Global Software, Inc. Our lunch sponsor for this event is Noetix. Continental breakfast and lunch will be provided. Drawings for valuable gifts will be held at the end of the conference day.

Appreciations

The SROAUG Board of Directors extends its thanks to all the participants who contributed to this year's activities. Each of our attending users, speakers, vendors, sponsors and newsletter authors contributes to our user groups' success. Uma and I, your SROUAG newsletter editors, offer special thanks to the writers for this issue of the SROAUG newsletter. While we often need to 'beat the bushes' for articles, this month several articles were submitted proactively. Three are included in this issue and we have reserved a longer piece for our upcoming publication in the late winter.

Invitation to Share Your Oracle Experience

The SROAUG Board invites you to share your Oracle knowledge and experience. Please consider submitting an article, tip or trick that would be of interest to other Oracle users for publication in a future newsletter. Both technical and functional topics are welcome. Submissions may be sent to the editors at the following addresses:

umamaniac@hotmail.com or
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Oracle Advanced Collections

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Earlier Oracle had "Collections" functionality built inside the AR which gave users a very small amount of collections capability. This Oracle Advanced Collections is a separate module that sits on-top of Oracle Accounts Receivables providing users a very wide range of collections activities and functionalities and thereby taking collections to a next level.

Oracle Advanced Collections uses many business essential features like notes, territory management, resource management etc., from Oracle CRM. And it integrates well with Oracle Credit Management Module.

Here are some best features of Oracle Advanced Collections in different areas of receivables management.

Collections:

1. Providing an every day work queue of customers at different levels (bill-to, customer, account & delinquent levels) for collectors
2. Providing a strategy to collect on customers - (different strategies can be assigned to different collectors)
3. Territory management (assigning different set of territories based on geographical location of customers, type of business etc)
4. Scoring customer accounts
5. Invoice viewing through bill presentment architecture (bpa)
6. Access to customer master with a touch of button
7. Adding notes at different levels
8. Collector backup management
9. Use of XML publisher to mail out dunning letters

Cash Application

1. Improve productivity
2. Increase on-line check history (i.e. 90 days to 180 days)
3. Increased on-line check detail history to 180 days (to expedite research)
4. Reduction in past due billings to customer (i.e. reduce the research required to apply unidentified cash)
5. The ability to interface electronic payments (i.e. Lock Box, EFT, EDI, ACH)
6. The capability to apply cash automatically (flexible algorithms)
7. The ability to perform search facilities while in a cash application mode
8. The ability for a cash applicator to view account status
9. The ability for cash appliers to access customer comments
10. The ability to contain both automatic and manual write-off thresholds for cash application
11. The ability to create a discrete transaction and date for a short payment/deduction

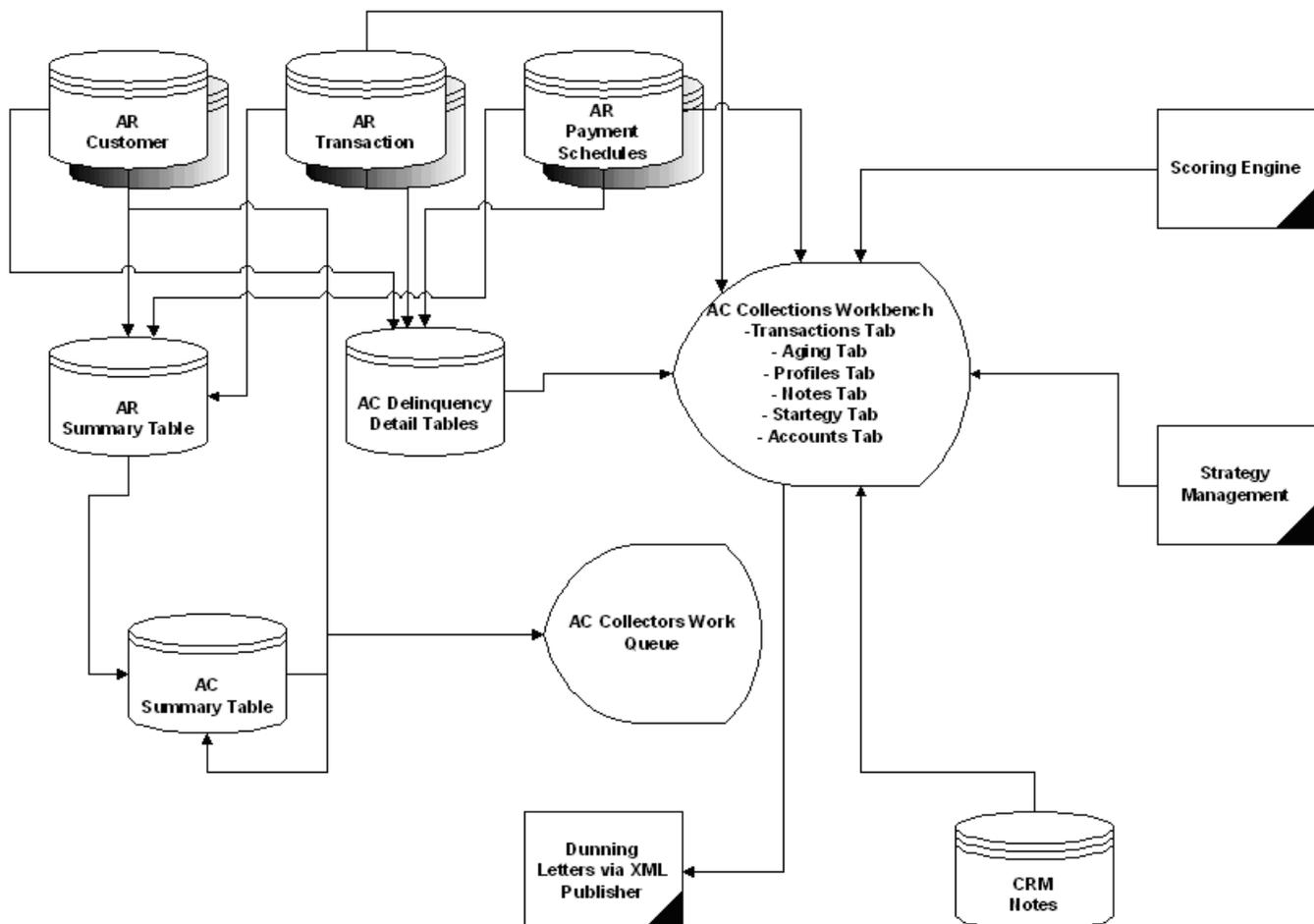
Dispute Management System

1. Visibility of information on the volume, dollar amount and types of problems to collectors, management and other parties concerned at all times
2. Automatic escalation will provide collectors with more time to spend on their portfolio
3. Increase recovery rate on disputed items
4. Reduced A/R as disputed related items are eliminated
5. Increased customer satisfaction and retention resulting from higher quality service
6. Reduced operating costs as rework and administrative errors are eliminated
7. Automatic notification and escalation for each type of problem to the individual departments

Thus Oracle Advanced Collections helps your Receivables Management System in many aspects.

Here is a simple flow chart explaining briefly Advanced Collections setup

ADVANCED COLLECTIONS PROCESS / DATA FLOW



For more information on Implementing, consulting & customizing Oracle Advanced Collections please contact us.

Geetha Murthy is a Director with ARC Solutions LLC. She is a functional consultant with ten years of experience in Oracle as a technical and functional consultant. Geetha has implemented Oracle financial modules for clients in multiple industries. She can be reached at 949-451-1786 or consult@arcsolutionsllc.com

Upgrading Oracle applications to R12

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Introduction

Upgrading Oracle applications to a new release such as R12 in a very complex environment can be challenging. This presentation focuses on the reasons for upgrading to R12, technology stack components in R12, upgrade path from various old releases of Oracle applications, pre-upgrade steps, upgrade steps, post-upgrade steps, and tips to minimize the downtime to make the upgrade a success. This paper is also an attempt to compile and consolidate various activities required during the upgrade from several metalink notes and upgrade document. More emphasis has been given on the technical tasks during the upgrade. The functional tasks will require engaging subject matter experts during the upgrade process to complete necessary tasks based on the client specific TUMS and maintenance wizard report. The tasks listed in the document can easily be converted to a project plan. All clients, consultants, DBAs, architects, project managers planning their oracle applications upgrade to R12 will significantly benefit from the details discussed in this paper.

Why upgrade?

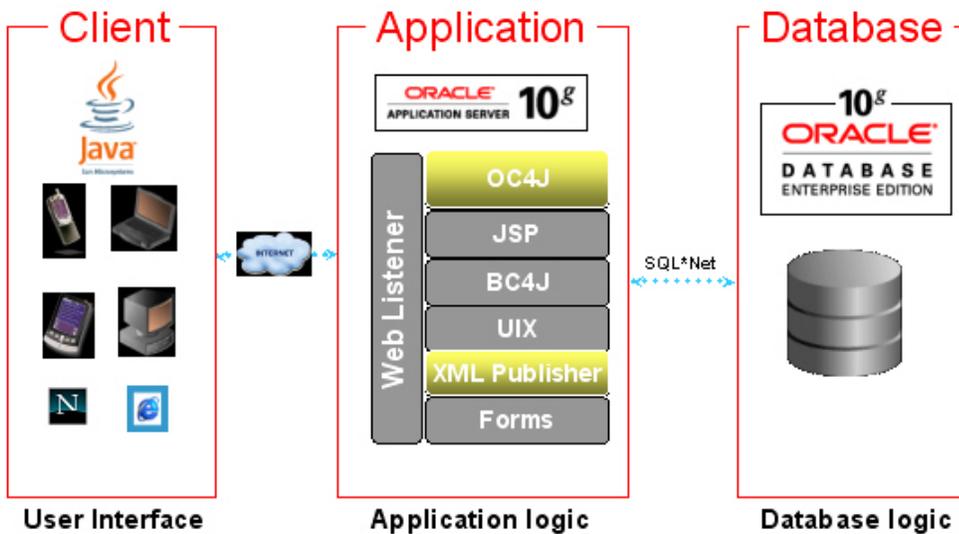
Upgrading to Release 12 provides following benefits:

- Think globally
- Work globally
- Manage globally
- Better user experience
- Reduced pop-ups and duplicate screens
- Re-designed and streamlined entire workflows
- Reduced the number of steps to complete key tasks
- Improved overall look & feel and visual style
- Increased personalization capabilities
- Numerous new features
- Several new functionality in the Financials area
- The best in technology RDBMS 10gR2, 10gAS
-

IT Drivers for the upgrade	Business Drivers for the upgrade
<ul style="list-style-type: none"> • Supportability • Stability • Improved performance • New features • Better transaction capabilities • Increased savings • Out of box use • Retire customizations • Reduce maintenance cost 	<ul style="list-style-type: none"> • New modules • New functionality • New requirements • Operational efficiency • Design improvements • Opportunity to Re-engineer • Extend Business-handling capabilities

Tech Stack components in R12

- Oracle 10g Application Server (AS) 10.1.2
- Oracle 10g Application Server (AS) 10.1.3
- Oracle Developer 10g (includes Oracle Forms)
- Java (J2SE) native plug-in 1.5.0_08
- Java Developer Kit (JDK) 5.0



- 10gAS 10.1.2 is used for forms, reports, and C code and replaces 8.0.6 Oracle Home that 9iAS 1.0.2.2 provided
- 10.gAS 10.1.3 is used for Oracle Application Framework and all java based applications that 9iAS 1.0.2.2 provided in 8.1.7 Oracle Home
- Integration with external systems is accomplished through 10gAS 10.1.2 for integration services, identity management, portal, discoverer, and web cache

Summary of changes

Component	Release 11i	Release 12
Database	9.2	10.2
Developer	6i	10i
Application Server	1.0	10.1
Client Plug-in	Jinitator	Sun JRE
Java Containers	Jserv	OC4J

Upgrade path

- Applications R11.5.6 and below requires to first upgrade to R11.5.10.2/10gR2
- Applications R11.5.7 and up can be directly upgraded to R12
- Database in all releases must have been upgraded to 10gR2 (11.5.9.2 / 11.5.10.2) or should be done during upgrade to R12 (11.5.9.1/11.5.10.1 and below)

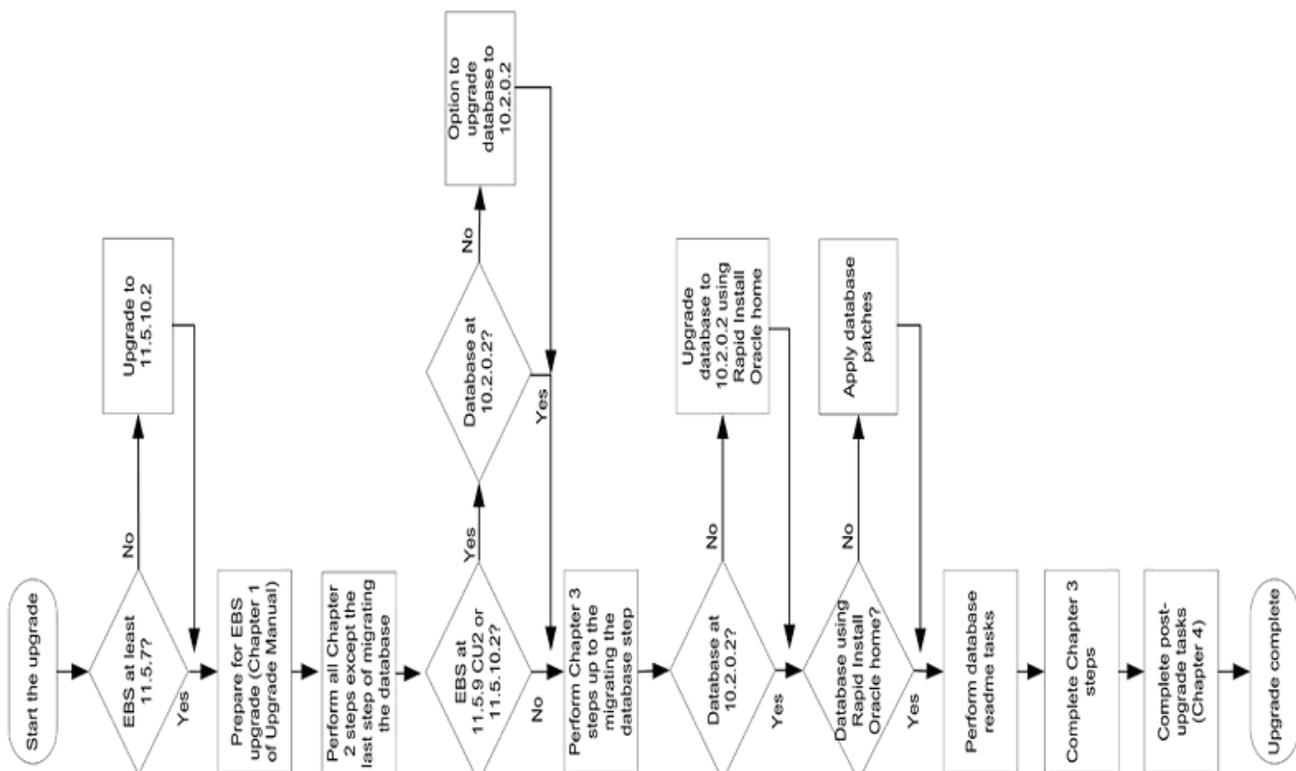
The database must be at 10gR2 or it should be upgraded to 10gR2 during upgrade to Oracle applications R12. Use Metalink note# 403339.1 for detailed instruction on upgrading Oracle Database to 10gR2 in preparation for upgrade to R12

Upgrade options with Oracle applications

	APPS						
DB	<11.5.7	11.5.7	11.5.8	11.5.9.1	11.5.9.2	11.5.10.1	11.5.10.2
9.2.x		A	A	A	A	A	A
10.1x				A	C	A	C
10.2.x	11.5.10.2				B		B

Option A: Upgrade to 10gR2 During R12 Upgrade	Option B: Already at the right Level for R12 Upgrade	Option C: Upgrade to 10gR2 Before OR During R12 Upgrade
Install R12 Tech Stack and 10.2.0.2 Home	Install R12 Technology Stack	Upgrade database to 10.2.0.2
Upgrade the Database to 10.2.0.2	Conditionally Apply database patches	Proceed with R12 upgrade OR use 11i with 10gR2
Perform Database Steps	Conditionally apply Service patch	Apply database patches
Conditionally apply Service patch		Conditionally apply Service patch

Flow chart depicting Oracle database upgrade path



Pre Upgrade Tasks

1. Apply 11i.AD.I (conditional)
It is Mandatory to have 11i.AD.I minipack on all application tier nodes. Refer to note# 233044.1 for more details
2. Run TUMS utility
 - Apply patch# 5120936 to the administration server in 11i Environment
 - cd \$AD_TOP/patch/115/sql; sqlplus <APPS username>/<APPS password> @adtums.sql <DIRECTORY>
 - tumsr12.htm report lists the steps that can be safely ignored.
3. Back up database, Applications, and customizations (recommended)
4. Prepare an upgrade plan for customizations (conditional)
5. Convert to Multiple Organizations architecture (required).
 - Follow metalink note#210193.1 for more details.
6. Drop event alert triggers in custom schemas (conditional)
 - cd \$ALR_TOP/patch/115/sql.
 - Sqlplus apps/apps @alrdtrig.sql
 - Re-create the triggers after the upgrade
7. Review sizes of old and new tablespaces (required)
 - Add 20% additional space to all tablespaces.
 - Use note# 399362.1 for more detail.
8. Run AD preparation scripts (required)
 - Apply patch# 5726010 to pprepare the system for conversion to OATM
 - Run adgncons.sql to configure the database to hold the new products to be added during the upgrade, and switche the system to use the new tablespace model.
 - Run adcrtbody.sql to create the new tablespaces, allocate unlimited tablespace to all APPS users, update fnd_product_installation table with correct data and index tablespace information, assign default tablespace to all APPS users, and sets the new_ts_mode flag in fnd_product_groups to Y.
 - Run adgrants.sql to grant SYS privileges needed by Applications, and create required views in SYS.
9. Convert Oracle Alert E-mail Processing to the Workflow Notification Mailer (conditional)

If response processing alerts is used then apply 11i.ATG_PF.H Rollup 4 (patch 4676589) to convert Oracle Alert to the Workflow Notification Mailer.
10. Conditionally complete product specific pre-upgrade tasks
 - Customer Relationship Management Tasks
 - Financials and Procurement Tasks
 - Projects Tasks
 - Public Sector/University Tasks
 - Supply Chain Management Tasks
11. Gather schema statistics for CBO (required)
12. Back up the database (recommended)
13. Run Rapid Install (required)

- Use Rapid Install wizard to lay down the file system and install the new technology stack for R12.
- Start Rapid Install/rapidwiz
- Select Upgrade to Oracle Applications Release 12.
- Select Upgrade Action screen,
- Select Create Upgrade File System.
- Enter the parameters required to set up your new environment.
- Run Rapid Install.
- Rapid Install delivers the unified upgrade driver that is used later to perform the upgrade. It is also run again after the upgrade to configure and start the servers and services.

14. Migrate or upgrade the database to Oracle 10g Release 2 (conditional)

It should be noted that Oracle applications R11.5.9.2 and 11.5.10.2 are certified with 10gR2. If the current application is running on R11.5.9.2 or R11.5.10.2 taking this step will reduce the downtime during the upgrade. If already not on 10gR2 use the instructions in metalink note# 403339.1 to upgrade the database to 10gR2.

15. Conditionally review pre-upgrade patches listed in Appendix - 'A'

Upgrade tasks

1. Disable AOL Audit Trail (conditional)

System Administrator >Security > Audit Trail > Groups > Disable

2. Shut down application tier listeners and concurrent managers (required)

- Cancel/complete running requests and shutdown concurrent managers

3. Migrate database to Oracle10g Release 2 (conditional)

- It is mandatory to be on 10gR2 for the upgrade to R12.
- Use instructions in note# 403339.1 to upgrade to 10gR2 if not done so already.
- Use 10gR2 Oracle Home delivered by R12 rapid install for this upgrade to avoid patches listed in Database Preparation Guidelines

4. Update init.ora with upgrade parameters (required) using note# 396009.1

5. Disable custom triggers, constraints, and indexes (conditional)

Get object definitions; disable custom triggers, constraints; drop custom indexes; verify and re-enable/recreate disabled/dropped objects after upgrade

6. Drop MRC schema (conditional)

- `cd APPL_TOP/admin; sqlplus system/password @addrpmrc.sql <APPLSYS username> FORCE`

7. Back up the database (recommended)

8. Ensure that Maintenance Mode is enabled (required)

- `adadmin >change maintenance mode >enable`

9. Apply Release 12 AD minipack (required)

- Download R12.AD.A minipack (4502962) and apply using instructions in note# 401424.1.
- No corresponding NLS patch is required.

10. Run the American English upgrade patch driver (required)
 - cd \$AU_TOP/patch/115/driver
 - Apply main R12 unified driver u4440000.drv with adpatch options=nocopyportion, nogenerateportion
11. Run the NLS upgrade patch driver (conditional)
 - Download the NLS Release 12 patch (4440000) for each active language in the system.
 - Run each driver (u4440000.drv) with adpatch
 - NLS patch driver has the same name as the American English patch driver.
12. Apply latest product patches (required)
 - Determine required product patches, admerge, and apply
13. Synchronize NLS and American English product patches (conditional)
 - Generate manifest using perl \$AD_TOP/bin/adgennls.pl
 - Backup manifest file \$APPL_TOP/admin/\$TWO_TASK/out/adgennls.txt
 - <http://updates.oracle.com/TransSync>
 - Don't check Translation Level Updates
 - Upload manifest
 - Download and apply patch
14. Disable Maintenance Mode (required)
 - Adadmin > Change maintenance mode >Disable maintenance mode
15. Reset init.ora parameters (required) using Note# 396009.1 as needed
16. Back up Oracle Applications (recommended)

Post upgrade Tasks

1. Reset ORACLE schema passwords (recommended)
2. Configure and start server processes (required)
 - Login to application server
 - perl <AD_TOP>/bin/admkappsutil.pl
 - FTP the appsutil.zip file from <INST_TOP>/admin/out to the <RDBMS ORACLE_HOME> on database server
 - Login to database server
 - cd <RDBMS ORACLE_HOME>
 - unzip -o appsutil.zip
 - \$RDBMS_HOME/appsutil/scripts/<CONTEXT_NAME>/adautocfg.sh
 - rapidwiz > Upgrade to Oracle Applications Release 12 > Upgrade Action > select Configure Upgraded Release 12 Instance
 - Enter <APPL_TOP>/admin/<CONTEXT_NAME>.xml (with complete path)

3. Configure Applications client software for forms applet (required)

- Use note#393931.1 and upgrade Sun J2SE (Native Plug-in) with Oracle Applications 12.0 Windows Clients

4. Reapply customizations (conditional)

- Update APPLSYS.env, devenv.env, adovars.env
- Restart applications server processes

5. Integrate custom objects and schemas (conditional)

- Refer Oracle Applications Developer's Guide to re-integrate customizations with Oracle applications
- Keep invokers rights in mind for additional grants to apps objects

6. Re-enable custom triggers, constraints, and indexes (conditional)

7. Configure SSL for Web Services (conditional)

- Generate certificate using wallet manager from \$IAS_ORACLE_HOME
- Update s_websrv_wallet_file parameter in the context file with absolute location
- Update password using \$FND_TOP/patch/115/sql/txkSetWalletPass.sql
- Use Note#376700.1 for more detail

8. Complete Workflow Notification Mailer configuration (required)

- OAM > Dashboard >Workflow manager > Workflow System region > Notification Mailers status icon > Service Components page.
- The Notification Mailers status icon should show a status of Down.
- >Service Components page > Workflow Notification Mailer service component > Edit
- Enter the name of the outbound SMTP mail server
- If inbound e-mail processing is required, select the Inbound Processing parameter in the Inbound Email Account (IMAP) region
- Enter the name of the inbound IMAP mail server, user name and password of the mail account that the notification mailer uses to receive e-mail messages, and the reply-to address of the e-mail account that receives incoming messages, to which notification responses should be sent.
- Apply
- Service Components page
- Verify the status of the Workflow Notification Mailer service component status as Running

9. Complete Transport Agent setup (conditional)

Set following OXTA parameters in the container configuration

OAM > Sitemap > AutoConfig > Applications Node > Edit Parameters >Search OXTA

- OXTAOutUseProxy=True
- OXTAOutProxyHost=<Your proxy server name>
- OXTAOutProxyPort=<Your proxy server port>

run AutoConfig to regenerate oc4j.properties file \$INST_TOP/ora/10.1.3/j2ee/oafm/config/oc4j.properties

10. Complete setup for Oracle XML Gateway (required)

Set following profile options at site level

- ECX: XSLT File Path: Location for style sheets, must be part of UTL_FILE_DIR with a terminating /
- ECX: System Administrator Email Address: for error notification
- ECX: Server Time Zone: Time zone of the db server

11. XML Publisher

- Enable PDF printing (required)

The PDF Publisher print style and PASTA_PDF printer driver provide the capability to print PDF files using a third-party utility.

The -Pasta Universal Printer type has been associated with the style and driver for ease of use.

- Specify a temporary directory for XML Publisher (required)

12. Verify completion of concurrent programs (recommended)

- The upgrade process creates numerous concurrent program requests.
- These jobs are automatically started once apps services are started
- The complete data cleanup and upgrades to historical data.
- These programs run in the background, while the system is up and running and users are active,
- Be sure all the concurrent programs generated by the upgrade have run successfully
- Refer to note# 399362.1 for more detail.
- Make use of the best practices to isolate concurrent manager queue for the post upgrade tasks

13. Install online help (recommended)

- Adpatch u5051400.driv located in \$AU_TOP/patch/115/driver directory with options=hotpatch,nocopyportion,nogenerateportion.
- Repeat the above for each active language.

14. Update/verify custom responsibilities (conditional)

- System Administrator responsibility, navigate to Security > Responsibilities. Query each custom responsibility and update as necessary.

15. Migrate custom development to new technologies (recommended)

- Mod_plsql to Oracle application Framework
- Reports to XML Publisher
- Forms and charts to Framework based application
- Personalizations in the same db are preserved
- Copy and re-customize modified scripts or reports (conditional)
- Refer to note# 374398.1 and 391554.1 for more detail.

16. Migrate CUSTOM library (conditional)

- cd \$AU_TOP/resource
- Backup the new CUSTOM library (CUSTOM.pll) in a safe place.
- Backup and place old CUSTOM library in the new directory.
- Upgrade to Oracle Forms Developer 10g by regenerating the library.
- Refer to Using the CUSTOM Library in Oracle Applications Developer's Guide for more detail

17. Copy custom application directory and re-customize as necessary
18. Copy and update custom start scripts (conditional) for the new environment
19. Review user responsibility assignments (recommended)

Use the information on the Forms or Security reports in the System Administrator responsibility to confirm that permissions granted by responsibilities continue to meet the requirements of the job roles (without granting more privileges than are necessary).

20. Complete functional tasks associated with the following products

- Alerts
- Multiple Organization
- Report Manager
- Web ADI
- Workflow
- Customer Relationship Management Tasks
- Financials and Procurement Tasks
- Human Resources Tasks
- Intelligence Tasks
- Projects Tasks
- Supply Chain Management Tasks

21. System maintenance tasks

- Delete obsolete product files (recommended)
- Drop obsolete columns (recommended)
- Licence new products (conditional)
- Update Java Color Scheme profile option for selected users (conditional)

22. Migrate Existing Objects to New Tablespace Model (OATM)

- The system was converted automatically to the new Oracle Applications Tablespace Model (OATM) during the upgrade
- The upgrade process creates tablespaces for all new products, configures the database for the new tablespace model, and creates new objects.
- However, it did not automatically migrate existing objects to OATM
- It is strongly recommend to perform this migration now.

23. Implement New Product and Country-specific Functionality
24. Apply latest HR global note# 145837.1 for the US
25. Apply latest HR global note# 414434.1 for other installed languages
26. Apply Languages synch patch for R12
27. Resize the Database
28. Back Up Oracle Applications
29. Review Security Practices note# 403537.1
30. Log On to Oracle Applications, test, and release the system to users

Customizations requiring change

1. Forms
2. Reports
3. C code
4. Java code

5. AutoConfig Configuration Customizations
6. Development Tools: compilers, Forms/Reports Builder 10.1.2, JDev 10.1.3
7. User Interfaces: new look & feel

Integrate external services

Following external components can be conditionally integrated after the upgrade

1. Convert to RAC
2. Integrate OracleAS 10g Single Sign-On & Oracle Internet Directory 10.1.2.x
3. Setup load balancing
4. Setup Disaster Recovery
5. Discoverer 10.1.2.x
6. Portal 10.1.2.x
7. Reverse proxy / WebCache 10.1.2.x
8. Oracle Integration 10.1.2.x
9. Collaboration Suite 10gR2
10. Enterprise Manager 10gR2
11. Planned hardware replacements
12. Reporting servers
13. Monitoring using EM10g
14. Archive / Purge

Applying the maintenance pack

Apply the latest E-Business Suite 12.0.2 Release Update Pack Readme using note 430114.1

Minimize downtime

- Adequate hardware resources
- Shared Appl_Top
- Staged Appl_Top
- Distributed AD
- Hot patch
- Merge patch
- Archive/purge strategy
- Optimal number of workers
- Choose appropriate batch size
- Tune long running jobs
- Automate manual tasks

Facts

- DB Size 7 TB
- % DB growth < 20
- CPU Usage 90%
- I/O response time 10-15 ms
- 3 years data upgrade timing < 2 days
- Post upgrade 13 Hrs while the system is up.

What you can do now?

Even if you don't have a plan to upgrade to R12, please do clone your production instance and plan an upgrade to know all the steps required for your instance and get a clear picture of issues, fixes, downtime, etc. It is mandatory to be on 10gR2 for upgrade to R12. Plan your application/database upgrade in advance to minimize the down time during final upgrade.

How to be successful

Successful upgrade requires lots of planning and testing. Following tasks should be planned and executed carefully to make the upgrade a success:

1. Early planning
2. Develop upgrade Strategy
3. Plan upgrade path
4. Ensure adequate hardware resources
5. Ensure skilled staffing resources
6. Easy access to training and documentation
7. Study technical impacts
8. Study functional impact carefully
9. Testing of key features
10. Multiple test upgrades
11. Cutover and transition tests
12. Identify upgrade downtime target
13. Downtime reduction versus ease of upgrade

Recommendation

Use of Maintenance Wizard is recommended to guide through the upgrade process. It draws on instructions from numerous manuals and other documentation to provides a complete picture of the activities required for an upgrade. The Maintenance Wizard helps in reducing upgrade tasks by dynamically filtering the necessary steps based on criteria it obtains from applications environment. The resulting report is a set of step-by-step instructions that needs to be followed to complete the upgrade. It can also automatically execute many of the tasks reducing the possibility of errors or accidental omission of any tasks.

Acknowledgement

My sincere thanks are due to my manager Dennis Horton and many consultants from Oracle Corporation for their valuable feedback during writing of this paper, which helped me significantly to bring this paper in its current form. I am also thankful to all the DBAs and consultants in the field with whom I had discussion regarding this paper.

References

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2. Oracle 10gR2 Database Preparation Guidelines for an E-Business Suite R12 Note#403339.1
3. Oracle applications R11.5.10.2 Maintenance pack Installation Note#316365.1
4. Oracle Applications Upgrade Guide: Release 11i to Release 12 Part# B31566-01
5. Database Initialization Parameters for Oracle Applications Release 12 Note#396009.1
6. Oracle Applications Release Notes Release 12 Note# 405293.1
7. E-Business Suite Release 12 Upgrade Sizing and Best Practices Note# 399362.1
8. Upgrading to R12 Note# 414710.1
9. Maintenance Wizard Note# 215527.1

Appendix-‘A’ Pre-upgrade patches

Patch #	Task Reference	Product/Conditions
5120936	Run TUMS utility (recommended)	All/None
4676589	Convert Oracle Alert E-mail Processing to the Workflow Notification Mailer (conditional)	Alert/11i.ATG_PF.H RUP 4 - if you have not already converted
ML# 396079.1	Create new product catalog (conditional)	Advanced Product Catalog
4963569	Verify completion of Sales Compensation processes (conditional)	Incentive Compensation/None
4153130	Set minimum patch levels (conditional)	Fin for India/Patch Set - if not at IN60105D2
4923208	Set minimum patch levels (conditional)	Fin for India/Consolidated Patch - if not at IN60105D2
5259121	Run Accounting Setup Manager Diagnosis for MRC (optional)	GL/Optional task
4607647	Prepare data for credit card encryption upgrade (conditional)	Payments/If not already using enhanced product
5233248	Set range of periods (optional)	Assets, Cost Management, E-Business Tax, Financials for the Americas, Payables, Projects, Purchasing, Receivables/releases earlier than 11.5.10.3CU
5382135	Identify and resolve problem data (conditional)	Depot Repair/None
4563075	Prepare to migrate OPM data (conditional)	OPM/None
4699061	Prepare to migrate OPM data (conditional)	OPM/None
4582937	Prepare to migrate OPM data (conditional)	OPM/None
5102439	Prepare to migrate OPM data (conditional)	OPM/11.5.8 or Family Pack H
4268525	Prepare to migrate OPM data (conditional)	OPM/11.5.9 or Family Pack J
4458028	Finish migration preparations for OPM (conditional)	OPM/11.5.7 or Family Pack H
5579359	Finish migration preparations for OPM (conditional)	OPM/11.5.8 or Family Pack I
4458024	Finish migration preparations for OPM (conditional)	OPM/11.5.9 and later or Family Pack J and later
4350832	Finish migration preparations for OPM (conditional)	OPM/11.5.10 or Family Pack K or later
4684603	Validate data for Rules and Time values migration (recommended)	Service Contracts/11.5.7 - 11.5.8
3649470	Verify Shipping Execution data for upgrade (conditional)	Shipping/11.5.7 or Family Pack H
5726010	Run AD preparation scripts (required)	AD/Prep scripts for OATM.

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Breakthrough on Asset Transfers Across Corporate Books

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Millions of companies rely on Oracle Applications for their financial, supply-chain management, and accounting software. While the Oracle Application is beneficial, Brian Bouchard, President and CEO of Chi-Star Technology SM, realized an area of opportunity with the software concerning asset transfers.

The current process to do an asset transfer is very manual and tedious. In order to transfer an asset, a person has to: manually retire the asset, record basic asset data for data entry into the receiving book, manually calculate the new values in the receiving book currency, and manually add the asset. After completion of the process, there is no longer a tie to the original asset, so the audit trail is permanently lost. The trail ends in the book where the asset is retired while the new trail is created in the book where the asset is added. Moreover, a method to produce the same desired results quickly and more efficiently could be even more beneficial to both large and mid-sized companies.

As a user of Oracle Applications for over fifteen years, Brian went to work devising a plan to combat this tedious process. In April 2005, the introduction of AssetCross TM came to the market as a solution to the manual asset transfer procedure. The AssetCross TM software will transfer single or multiple assets between corporate depreciation books, transfer full or partial (cost or units) assets, translate transferred amounts to the receiving depreciation book's currency, and maintain an audit trail with the original asset.

The introduction of AssetCross TM to the business world has revolutionized the asset transfer process. Fortune 500 corporations as well as mid-sized family-owned companies can all benefit from this software. AssetCross TM, dramatically improves the previous methodology used to transfer assets.

A distinct advantage of the AssetCross TM software is that this process is no longer manual. It automates all of the following:

- The gathering and transferring of asset descriptive information
- The retirement of the asset from the sending depreciation book
- The decision to determine if a translation rate is to be used
- The identification of the translation rate to be used
- The calculation of translated values
- The addition of the asset on the receiving depreciation book

The creation of AssetCross TM comes at a time where companies are growing and expanding locally and globally. The induction of this software as an addition to the Oracle Applications provides a better way of managing time that translates into economic savings. Exploring methods to monitor budgets can prove to be critical during the growth and expansion of any business. AssetCross TM exemplifies the saying "Time is money, and money is time."