

An Ingersoll Rand Success Story: Accelerate Data Migration for E-Business Suite Release 12

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CHAIN•SYS

Central States OAUG Spring 2011 St. Louis Conference





Confidential Subject to Terms of OAUG Membership



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Agenda

- **CHAIN-SYS** Overview
- eBS Data Migration Approaches
- Accelerate Methodology
- Case Study  *Ingersoll Rand*
-  R12 calculator: Upgrade vs. Re-implementation
- Q & A



CHAIN-SYS



About CHAIN•SYS

CHAIN•SYS is a fast growing technology, product and management consulting company. Established in 1998 and headquartered in Lansing, MI, with more than 350+ engineers and 100+ customers worldwide.

Strong Partnership with Oracle Corporation

- Oracle EBS, Database and Middleware products Reseller
- Oracle Platinum Partner
- Oracle EBS Mobility Solution Provider
- Oracle University Authorized Education provider and Center
- Oracle Consulting Services (ORS/NAC/NAIO/SSI) Partner

Proud developers and owners of:

- **e•chain**™ ERP/SCM suite for 11 verticals with 50+ implementations
- **appLOAD**™ family of productivity tools for Oracle eBS R12/11i
- Networking Products: Gopster Network Test Tools
- Custom Development

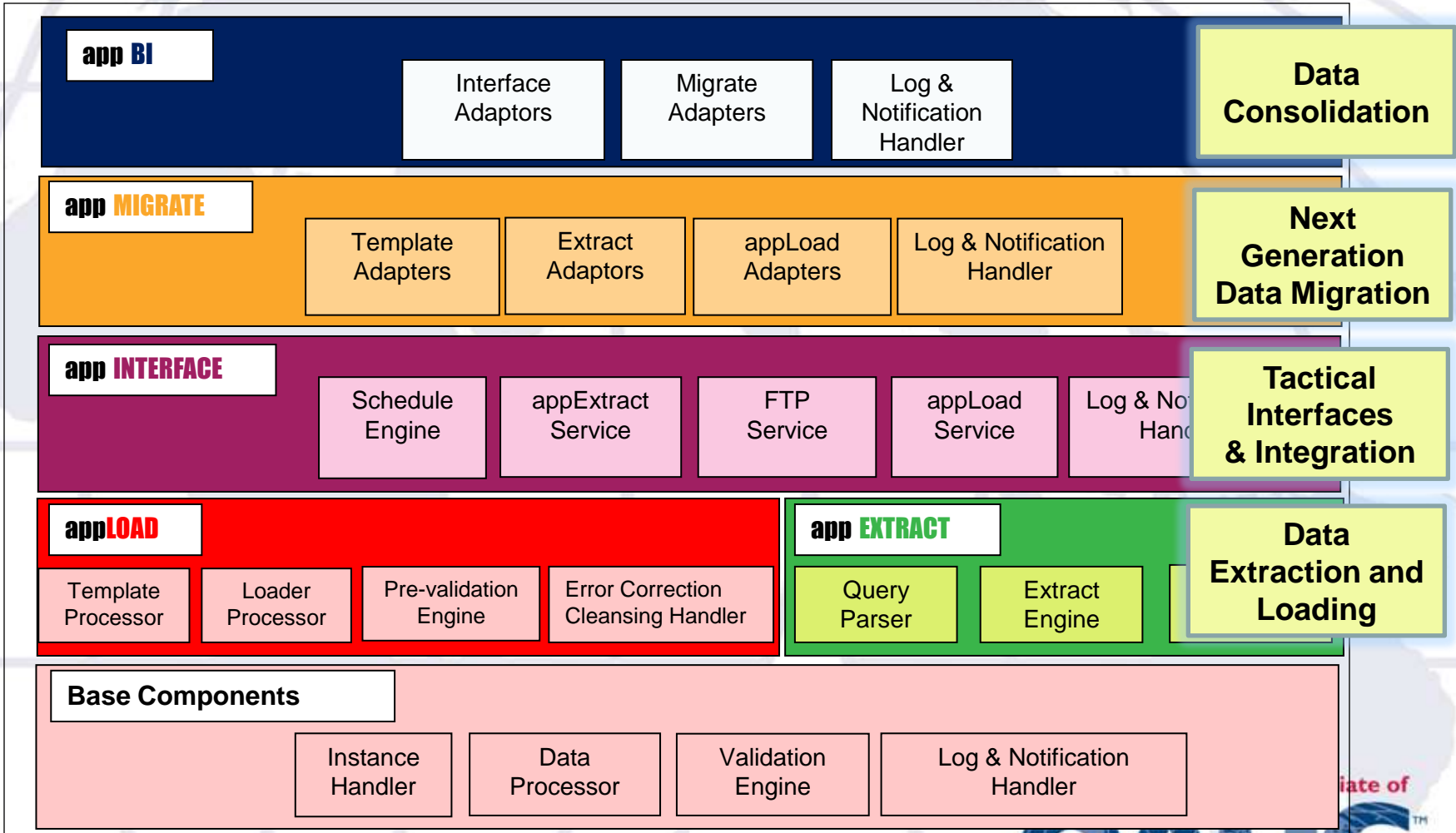


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Chain-Sys Product Overview



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eBS Data Migration

appMIGRATE™ The Next Generation in Data Migration

- Data migration is a low visibility, high risk activity, which only grabs management attention when it is late or flawed
- With rare exceptions, there are no “greenfield” implementations, timely and accurate data conversion is a necessity
- Migration activities: Extraction, Transformation and Load
- Building on proven technology and implementation best practices, **appMIGRATE** has an efficient, accurate and very cost effective approach to your most complex data conversions



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What if you did not have to Code?

Traditional data conversion for Oracle E-Business Suite R12/11i.

Technical Review,
decide data
entities,
data conversion
seq., validations
& translations

~~Estimate time
and effort and
budget for data
Conversion
Scripts~~

~~AIM Method
documentation
and Program
Development~~

Testing, QA, Bug
Fix, deploy in test,
QA, prod.
instances

~~Run Conversion
Requests and call
Programs~~

Correct Errors in
Source Files and
Resubmit the
exception rows

appMIGRATETM The Next Generation in Data Migration

Technical Review,
decide data
entities,
data conversion
seq., validations
& translations

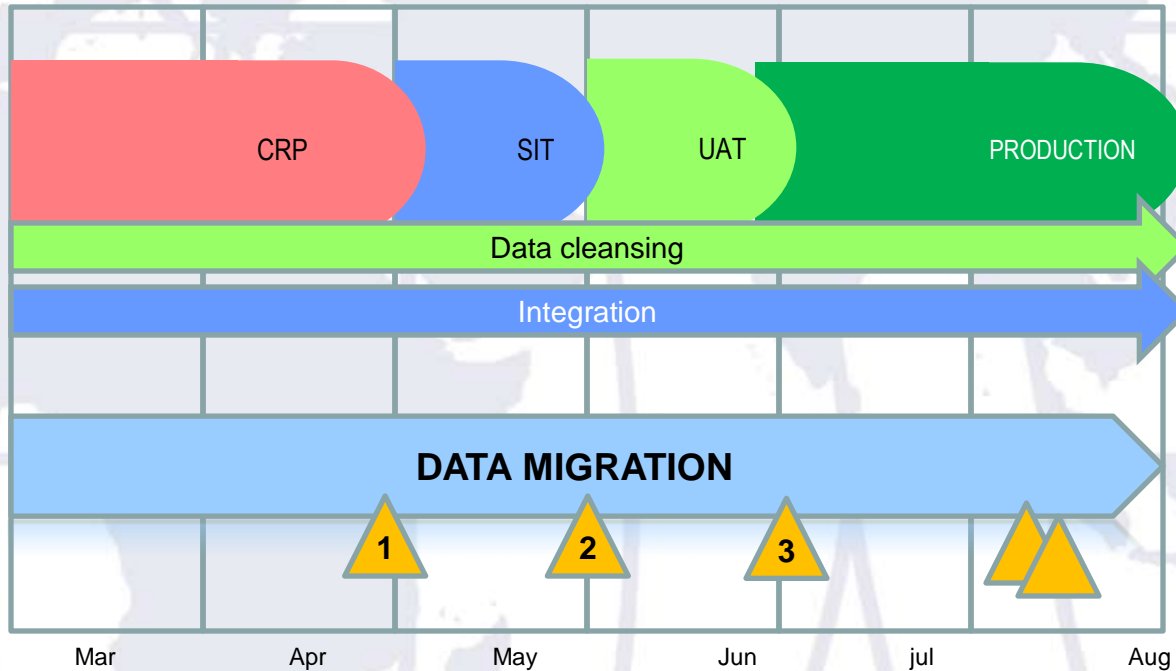
Configure
appLOAD
Templates and
Create high
quality Loaders

Correct Errors in
Source Files and
Resubmit the
exception rows

appMIGRATE Data Loading: 80% Cost
Savings + 3 to 4 months project time
saved + Happier Project Manager



Accelerated Data migration



▲ *data migrations to be performed during project*

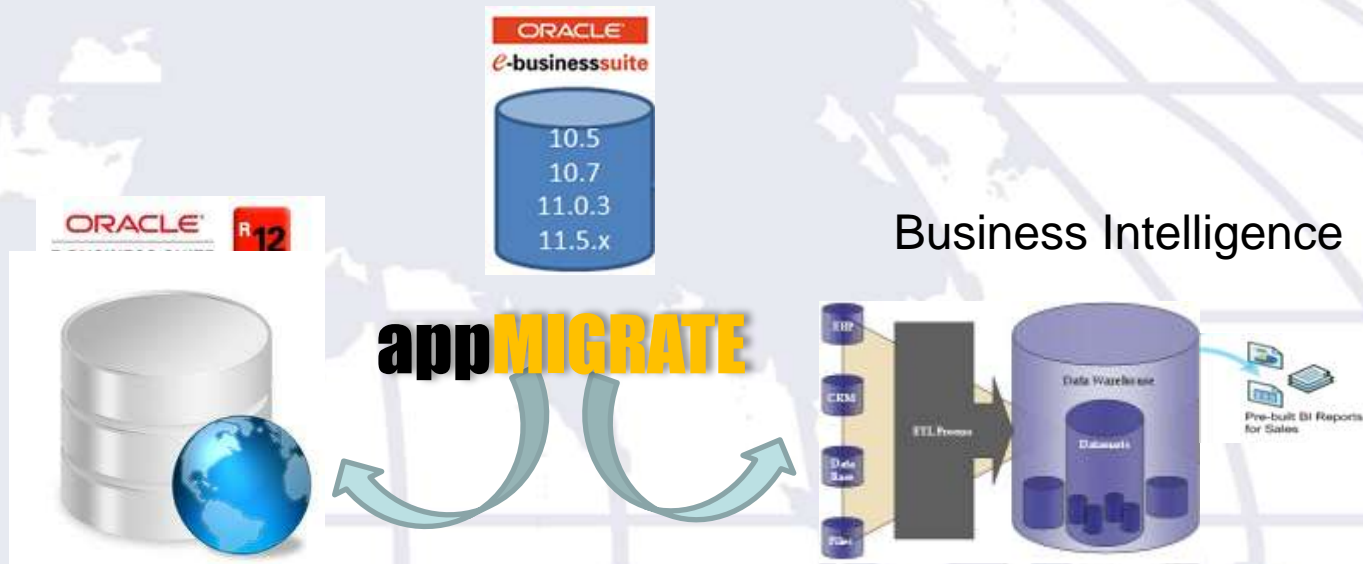
Delivering the initial data migration and deliver subsequent migrations according to this plan, results in data early in the project.



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Migrate and Report



**Deliver services and products that decrease your risk and save you time (and money).
Products delivered in SaaS model, pay for only what you need and use**

- Data migration factory - consistent with OBA, AIM/OUM-based or your delivery methodology
- Accelerated r12 upgrade factory – for customers outside of the Oracle standard upgrade path
- Specialized tools for interfacing and integration, built on Oracle and industry standards
- Quick start business intelligence schema and “dashboards” for use with OBIEE
- Global delivery capabilities - highly skilled, “battle tested” resources both on-shore / off-shore

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Accelerate your data into eBS



The next generation data cleansing, conversion and data uploading tools for Oracle E-Business Suite R12

appMIGRATE

- ✓ Data Loading: 80% Cost Savings + 3 to 4 months project time saved
- ✓ Proven solution: Over 200+ Extract and 200+ Load templates for Oracle eBS are already available
- ✓ Templates available for eBS Releases 10.7, 11.03, 11i, R12
- ✓ Includes robust data transformation feature
- ✓ Provides an automated (with manual review and intervention) data cleansing capability
Using: Data pre-validations (configurable), Business pre-validations (add your own) and Automatic Cleansing (configurable)
- ✓ Full data consolidation functionality
- ✓ Pre-validation allows correction of erroneous data prior to upload - reduces load iterations - saves time
- ✓ Predefined validations available
- ✓ Data Cleansing
- ✓ Error handler
- ✓ Staging Table
- ✓ FTP file transfer scheduler
- ✓ Schedule engine, Transaction log and notification handler

Ingersoll Rand Case Study

Reducing CFG Project Timelines



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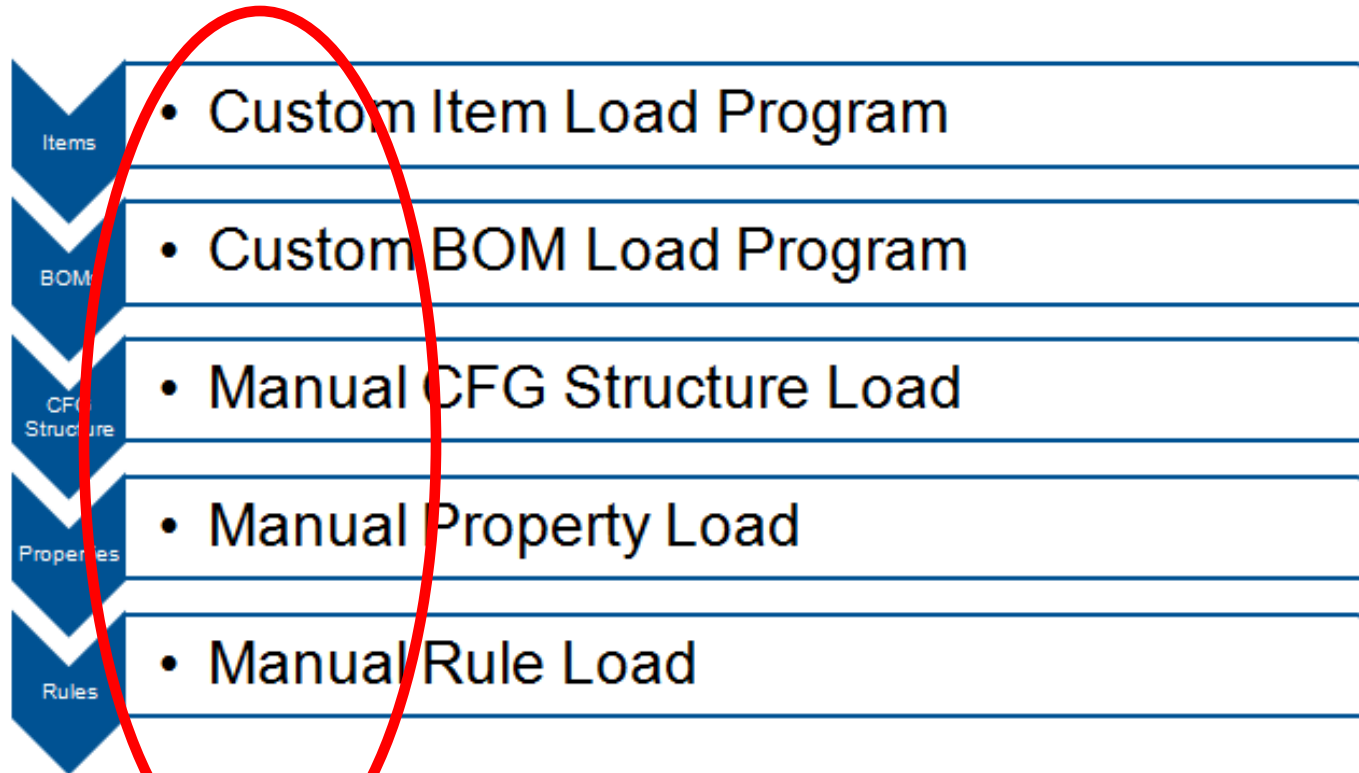
Ingersoll Rand Case Study

Project Challenges

- **First cut at the project timeline –**
 - 100 models
 - 40 modellers
 - 24 months
 - This was not a viable option and forced us to relook at our entire CFG project process and our modelling process
- **What could we do different?**
 - 100 models remained a constant, based on product
 - 12 modellers – that was the available staff
 - **REVAMP** all else – as follows
 - Created a model document that provided consistency in modelling
 - Create and Use Property based Rules – Goal – One per option class
 - Develop a system for loading properties into CFG Developer – Purchased Chain-Sys Appload tool
 - Develop Macros to pull information from Model Document and load Appload tool templates – ended up using multiple Appload data loads.

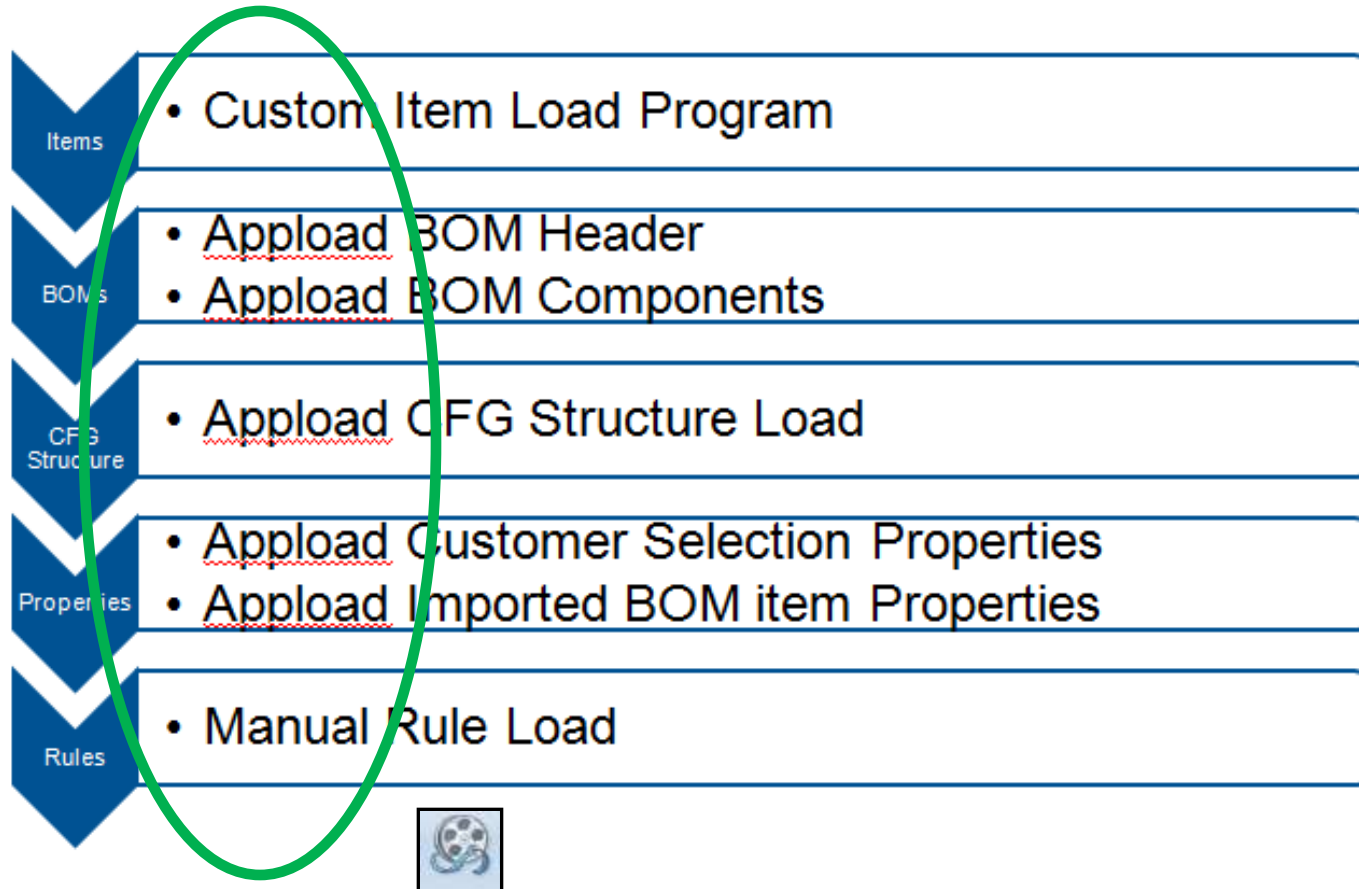
Ingersoll Rand Case Study

The Load Process – OLD, phase 1



Ingersoll Rand Case Study

The Load Process – NEW, Phase 2



Ingersoll Rand Case Study

Lets Look at the NUMBERS

OLD		NEW	
Items - Custom	Same	Items - Custom	Same
BOMS - Custom	Load – hard to find errors	BOMS - Appload	Ease of Use
CFG Structure - Manual	1 Day/ Model	CFG Structure - Appload	5 Minutes/ Model
Properties - Manual	2 Weeks / 1000 line OC	Properties - Appload	5 Minutes/ 1000 line OC
Rules - Manual	500 Rules/ Model - 2 Weeks	Rules - Manual	20 Rules/ Model - 4 hours

Ingersoll Rand Case Study

Reducing CFG Project Timelines

Conclusion

- Project timeline and resource challenges can make modeling practices evolve.
 - Switch from logic rules and design charts to property based rules
 - Consistent Model Documentation
 - Find ways to systematically load data so that the model document stays the master
- Following the new processes has given us the ability to significantly reduce our project modeling time and meet the overall project timeline.
- The reduction in modeling time has also provided the following benefits
 - More models finalized and ready for our integration and user acceptance testing
 - More models for testing interfaces to other systems
 - More models available for all training activities
 - Time to include a very thorough model audit for all models prior to user acceptance testing

Boart Longyear



Leading provider of mineral exploration drilling services and drilling products in the world today. The Company is the only integrated drilling services and products provider, combining engineering excellence, global manufacturing facilities and the most experienced drilling services group in the business.

CHAIN•SYS Products and Services: **appLOAD**

Customer:



Salt Lake City, Utah

Industry:

Oil and Gas

CHAIN-SYS Partner:

Oracle Consulting

REVENUE:

\$1 Billion +

PROBLEM: Legacy systems, Complex data migration into R12

SOLUTION: global data loading with no programming using **appLOAD**.

- ✓ AP Supplier (Creating and Updating)
- ✓ AR Customer (Creating and Updating)
- ✓ Bills of Materials (Creating and Updating)
- ✓ Bills of Materials Routing (Creating and Updating)
- ✓ Item Costing Creating
- ✓ HR Employees Creation
- ✓ Employees Salary Create
- ✓ HR Employee updating
- ✓ Employee Termination Details
- ✓ Grade Rates Creation
- ✓ HR Organizations (Creating and Updating)
- ✓ HR Person Extra Information
- ✓ INV Item (Category Assignment, Updating, Subinventory)
- ✓ Inventory Transactions with lots
- ✓ MRP Sourcing Rule (Creating and Updating)
- ✓ Project Creation (Project, Task and Key Member)
- ✓ PA Project Task Updating
- ✓ Approved Supplier List Creation
- ✓ PO Mass Close Purchasing Documents
- ✓ PO Order Creation
- ✓ PO Standard Purchase Order Creation
- ✓ Import Jobs and Schedules
- ✓ WIP Transactions
- ✓ WSH Shipping Intransit Times **affiliate of**



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The appMIGRATE™ facilitates Data Consolidation (cross references)

- Provide a Working Repository for Data Review
- Include a Presentation Layer for Data Review
- A Cross Referencing Capability supports Data Standardization / Harmonization
- Ability to Establish Logical Rules to Programmatically Transform Data
- Establish and Enforce Data Migration Rules
- Data Extraction and Load Templates for all eBS data elements
- Provides Central Data Repository (Data Mart) for Data Review, Cleansing and Transformation Prior to Load
- Uploads Data to Central Repository
- Includes Tools to Support Data Cleansing
- Includes a BI Capability tied to the Data Mart for Data Review and Analysis in Support of Cleansing Prior to Load



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The **appMIGRATE**™ supports Data Cleansing

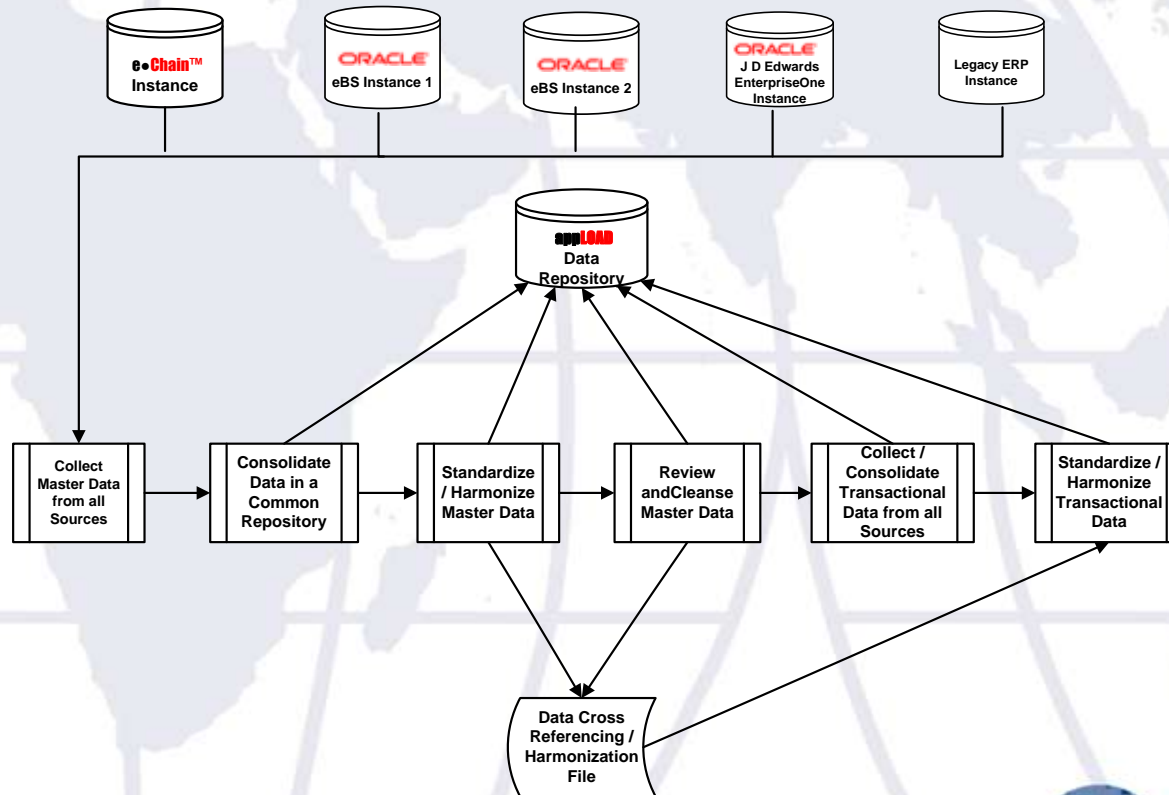
- Compare Master Data to Locate Duplicate Records With Alias Key Identifiers
 - Based on Sound
 - Based on Key Words (Levinstein Distance Method)
 - Custom Configured Logical Relationships
- Easily Identify Obsolete Master Records (Item, Customer, Supplier, etc.) based on Activity and Access and Eliminate them Programmatically if Desired
- Access Web Enabled Service Providers to Correct / Update Standardized Data (for example Address Standards)
- Ability to Establish Logical Rules to Programmatically Transform Data



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The **appMIGRATE**™ supports Data Consolidation and Cleansing



appMIGRATE™ Data Extraction Process

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CHAIN•SYS Integration using **appINTERFACE** and **appMIGRATE**

PROBLEM: Large global roll-out; migration from 11.5.10.2 to R12.1.1; extensive interfacing of Enterprise applications; 1 TB of data; needed to keep source systems

SOLUTION: interfacing using appINTERFACE to all source systems; migration of R11.5.10.2 to R12.1.1

Customer:



Industry:

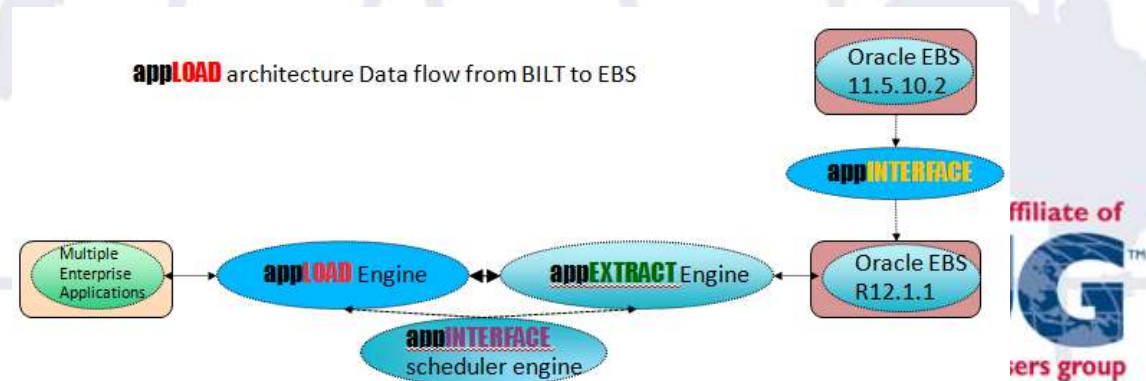
Paper MFG

Implementation Partner:

Chain-sys

REVENUE:

\$1 Billion +



When to upgrade or re-implement?

Re-implement:

- Major Business process changes
- Organizational restructuring
- Significant changes on setups
- Heavily customized
- Consolidation of instances
- New module implementations
- Historical data to be viewed from BI



Upgrade:

- No Major Business process changes
- No Organizational restructuring
- No Significant changes on setups
- Heavily customized
- No Consolidation of instances
- New module implementations (not much)
- Already historical data is purged



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Complete Methodology

Source Systems



GetClean

eBS 10/11
or legacy

eBS R12

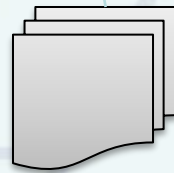
*De-activate/Archive,
Cleansing in current
systems*

appMIGRATE

Combine,
Match,
Grouping,
Cleansing,
Enrichment
Unforming

*Consolidation/
Cross Reference*

Cleansed data



*Data for
Enrichment*

StayClean

xref

Customer
Online

Trading
Partner
Hub

Oracle Data
Quality Mgr

3rd-Party



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Sample Clients



Q&A



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