

Best Practices for Upgrading Primavera P6 EPPM

An Oracle White Paper
December 2011



Best Practices for Upgrading Primavera P6 EPPM

| | |
|--|----|
| Introduction..... | 3 |
| Upgrade Overview | 3 |
| The Upgrade Process | 3 |
| Technical Environment Assessment..... | 4 |
| Preparing for the Upgrade..... | 4 |
| Upgrade to Primavera P6 EPPM 8.2 | 5 |
| Post-Upgrade Activities..... | 5 |
| Web Application Server Installation | 5 |
| Environment Turnover to Project Team | 5 |
| Examining Your Upgrade Criteria | 5 |
| Application Functionality | 5 |
| Technological Enhancements..... | 6 |
| Operational Considerations..... | 6 |
| Support Availability..... | 6 |
| Identifying Your Upgrade Path | 6 |
| Upgrade Best Practices..... | 7 |
| General Recommendations | 7 |
| Project Initiation Considerations | 10 |
| Prepare Your Technical Environment..... | 11 |
| Upgrade Verification..... | 12 |
| Upgrade Your Data..... | 13 |
| Training | 13 |
| Post-Upgrade Activities..... | 14 |
| Conclusion..... | 15 |

Best Practices for Upgrading Primavera P6 EPPM

Introduction

Oracle's Primavera P6 Enterprise Project Portfolio Management (P6 EPPM) applications have evolved over time, and Oracle's commitment to customers, this suite of applications, and creating best in-class products remains steadfast. The P6 EPPM product has expanded significantly in functionality, scalability, usability, and reduced cost of ownership over the past few releases, including dramatic leaps with the recent P6 EPPM 8.2 release.

This white paper will guide you through the major areas to consider in determining when an upgrade is appropriate for your organization. Based on your current release of P6 EPPM software, it reviews the most common upgrade paths and aims to provide you with a framework for determining the best possible upgrade agenda for your organization.

You should consider upgrading your current P6 EPPM version for many reasons. For example:

- Upgrading may provide access to new functionality and software applications that can help keep your organization well positioned to meet your business objectives through leveraging the latest technology and built-in business processes
- In an increasingly rigorous regulatory compliance environment, upgrading may facilitate compliance at a lower cost through retiring customizations
- Upgrading will allow you to leverage the latest performance and usability enhancements, enabling you to increase the efficiency of your applications and your business
- Upgrading can ensure you remain eligible for the highest levels of product support

In evaluating any upgrade, there are many factors to consider, such as support timeframes, functional capabilities, technical infrastructure, and underlying business needs. These factors are often complex and interrelated – all of which adds to the importance of determining the most appropriate upgrade strategy.

To help you make an informed decision, this paper outlines our plans for supporting and advancing P6 EPPM.

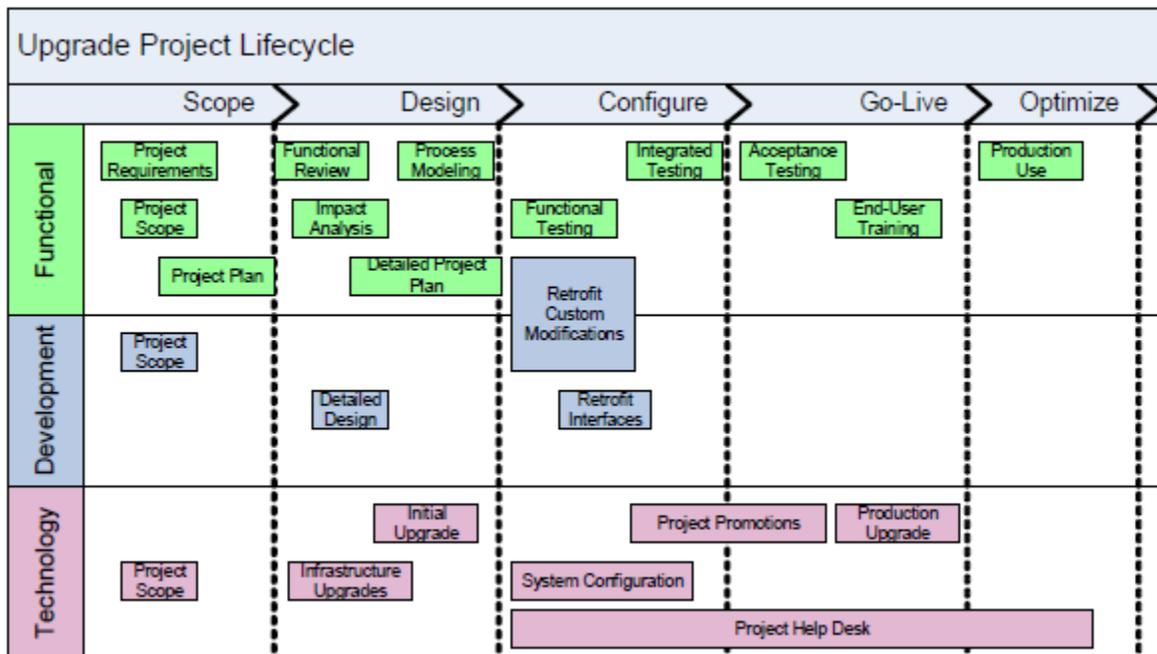
Upgrade Overview

Before pursuing an upgrade, it is imperative that you fully understand the upgrade process, potential upgrade paths, and most importantly, what your criteria are for considering an upgrade of your P6 EPPM solution.

The Upgrade Process

An upgrade project is similar to an implementation project; however, upgrade projects can be significantly more efficient because they leverage your previous implementation efforts, acquired knowledge, and outputs. In addition, upgrades can be executed within the current change management system used by your organization. Within the upgrade project, there are several key areas of work that begin with project definition and continue through the training of personnel on the new solution. The five major phases to a standard upgrade project are Scoping and Planning, Design and Process Modeling, Configuration, Go-Live, and Optimizing.

The following graphic presents the lifecycle of a typical P6 EPPM upgrade project.



The technology activities associated with an upgrade typically represent one-third of the overall project workload and are critical to success because these steps upgrade the application objects, master configuration data, and business transactional data that comprise the foundation for development and functional activities. The following steps are typically completed before the upgraded environments are turned over to the other areas for retrofitting and testing.

Technical Environment Assessment

Prior to starting your upgrade, you should inventory and review your configuration for the hardware and software used to support your current P6 EPPM application. Compare the Tested Configurations for the new release against your inventory to determine gaps in your infrastructure that need to be addressed. Many customers retire old servers during an upgrade, using the updated server hardware for the upgrade itself. It is strongly recommended that you have your enterprise servers and database servers sized by your hardware partner. P6 EPPM 8.2 may have a different processing footprint than your current release being used.

P6 EPPM 8.2 requires Web application server technology. If you have not deployed web clients in your current application release, you will need to plan how this technology will be deployed in your infrastructure to meet your IT and business requirements. Oracle Consulting or an Oracle partner can provide technology assessments and architectural planning workshops to guide you through these processes.

Preparing for the Upgrade

It is important to provide the functional project team with an upgrade environment that was taken from an exact copy of production. This replication allows the team to work with the most current set of transactional data for testing, and utilize any custom modifications that were in production at the time of the upgrade. Before the upgrade begins, Oracle recommends that you copy the entire production environment into one of the environments you will initially upgrade. For most customers, this environment will be the prototype or pilot environment.

Another preparation task is to make sure that all servers have been installed and validated against the minimum technical requirements for P6 EPPM 8.2. Be sure to include any software requirements.

Ensure that you have downloaded P6 EPPM 8.2 media from [Oracle Software Delivery Cloud](#). This download can be a lengthy activity, so allocate enough time to complete this step before the upgrade. In addition to the core media download, also ensure download of the [latest service packs available for the P6 EPPM 8.2 release](#), which you can find in the readme for the media pack.

Upgrade to Primavera P6 EPPM 8.2

During the upgrade process, predefined tasks are executed to move the data and software from one major release to the next. Guidelines for implementing these steps are outlined in the *Upgrading and Configuring P6 EPPM* guide which you can also download with the P6 EPPM 8.2 documentation media on [edelivery.oracle.com](#).

Post-Upgrade Activities

Upon the completion of the upgrade, post-upgrade tasks must be completed before turning the environment(s) over to the functional and development project teams. Oracle strongly recommends that you apply current Service Packs available for the release. As part of this workflow, also build and deploy a full set of client and server packages as well as execute a series of processes that surface tests the environments.

Web Application Server Installation

A Web application server must be installed and configured for development and functional project team usage.

Environment Turnover to Project Team

After executing the steps just described, the environment should be available for the respective project teams to start the development and testing processes.

Examining Your Upgrade Criteria

There are several areas to consider as you examine your upgrade options, including application functionality, technological enhancements, operational considerations, and support availability.

Application Functionality

As in previous releases, P6 EPPM continues to deliver role-based interfaces which allow the tailoring of the correct functionality to the appropriate members of the project team. Each module in the P6 EPPM suite has been designed with specific project stakeholders in mind.

When considering an upgrade, most organizations begin with a critical assessment of the new capabilities and enhancements to current features provided in the new release. A firm grasp of these new capabilities and enhancements is essential to evaluating the value to be gained through your organization's investment of time and resources.

In many instances, newly available capabilities can offer several productivity advantages, including increased business value and lower operational costs (for example, through the retirement of customizations). In evaluating any new Primavera P6 EPPM release, think about your current environment and whether the version in place meets the needs of today as well as the demands of your business for the next three to five years.

A [What's New in P6 EPPM](#) for P6 EPPM is the best first step to understanding the major changes included in the new release.

Your Oracle Consulting sales representative can help you identify new features, functionality, and processes that may provide value to your organization.

Technological Enhancements

As you evolve your application upgrade strategy, you should consider your technical infrastructure requirements, including client architecture, application server, Web services, and database options. Consider what has changed or what will change in terms of platform support, and also be aware of infrastructure enhancements that may provide additional benefits to your production environments. For example, by choosing to leverage current Oracle Fusion Middleware and database options, you could experience substantial productivity benefits by having your database and application server running on a single platform.

P6 EPPM has traditionally afforded several choices of technical infrastructure, and this flexibility continues to be available. In the past year, we expanded the choices again, with the additional infrastructure option of Oracle Fusion Middleware for your P6 EPPM applications.

Oracle's industry-leading Lifetime Support Policy of your infrastructure configuration is well documented in [Lifetime Support Policy](#).

Operational Considerations

Oracle continually seeks to improve your return on investment by leveraging technology to reduce the resource requirements required to operate and maintain your enterprise solutions. This means customers like you can install and implement software more quickly, simplify upgrades, receive real-time support and performance diagnostics, and achieve robust integration with other Oracle software—delivering quantifiable benefits. The P6 EPPM 8.2 release takes these benefits to the next level.

Oracle continues to deliver improvements that will further reduce implementation costs, enhance usability, and increase supportability.

For organizations running more than one instance of P6 EPPM, the cost, risk, and operational value of instance consolidation should be included in your upgrade value analysis.

Support Availability

One important benefit of pursuing an upgrade is to ensure continued access to robust technical support that P6 EPPM application users have come to expect. As part of our [Applications Unlimited](#) commitment to our customers, Oracle provides continued enhancements to the current Oracle applications beyond the delivery of Oracle Fusion. Oracle is committed to supporting customer investments in technology platforms for these applications as well as our certified infrastructure products (hardware, operating systems, databases, and middleware).

With the guaranteed support announced through the Oracle Lifetime Support initiative, Oracle customers can remain on their P6 EPPM applications and be confident of support with currently supported platforms. Oracle is providing visibility into product road maps, and helping customers derive continual success from their current applications by delivering dedicated, world class development and support for years to come.

Identifying Your Upgrade Path

In addition to the factors just discussed, you may also want to consider the amount of time needed to upgrade and ensure that you will have the full support and coverage for your solution. Based on this timeline, you can craft a strategy to maximize the value of your investments and take advantage of Oracle support for the entire lifecycle of your solution.

Upgrade Best Practices

In preparing to successfully upgrade, there are multiple considerations to include in your upgrade planning and execution efforts. Within this publication, Oracle has gathered tips and techniques from hundreds of experienced systems managers, consultants, and partners. These recommendations are intended to help you learn from others and manage a successful upgrade project.

General Recommendations

The following general considerations should form the backbone of your upgrade initiative.

Tip #1—Determine Your Upgrade Path

Refer to the system requirements and supported platforms using the [Tested Configurations](#) document to determine supported upgrade paths for major releases. Verify whether you can upgrade directly to the target release or whether you must first upgrade to a previous release before moving to the target release. In addition, evaluate the complexity of your upgrade effort based on the number of modules implemented, number of integration points, number of interfaces, total number of business process scripts, and number of customizations that need to be brought forward. Finally, determine the metrics and cost associated with each aspect of the upgrade. Each consideration should be addressed through a thorough upgrade assessment.

Tip #2—Treat Your Upgrade Activity as a Formal Company Project

The single best predictor of upgrade success may be the planning and project management rigor invested. A structured approach for managing the tasks, resolving issues, and measuring progress is absolutely critical. Equally important is a clearly defined and documented project scope. A defined scope is critical to project measurements necessary for time and cost containment. Experience has demonstrated that clear issue definition, strong project management, and executive ownership are critical success factors to a well-performing project effort. If your organization has good project management expertise in house, you have an important asset to leverage. However, if this expertise is not readily available, it should be acquired early on in the project to ensure proper guidance and controls are in place. In either case, you will need someone with experience managing technical projects who can also help you anticipate and manage the effects of this initiative on other parts of the organization including end users, managers, and executives.

Tip #3—Use an Appropriate Change Management Strategy

Managing development, application configuration, and technology changes during an upgrade project is critical to providing a stable environment for the project team.

During an upgrade, it is imperative to freeze metadata and system data in your production environment. With respect to the new release, ensure all relevant patches are applied appropriately. Failure to effectively manage these different change management requirements can result in upgrade step failures and unexpected user acceptance test results. Once you have addressed this consideration, you should proactively search for issues throughout your upgrade effort and schedule relevant updates until you reach a “go/no-go” milestone. At this point, you should enforce a new release content freeze to stabilize the environment. For information on relevant patches, periodically consult the following knowledge base document: [What Are The Latest Service Packs \(SP\) For Primavera P6 Release 8.2 \(P6 R8.2\)? \(Doc ID 1326979.1\)](#).

Tip #4—Build an Upgrade Team with Broad and Complementary Skills

Several different skill sets will be necessary to successfully upgrade your system. The following table details recommended roles that should be staffed within an upgrade project team. Note that a steering committee is

critical to success. Creation of an active and interested steering committee is imperative because critical business decisions must be efficiently made and dealt with throughout the project. Furthermore, project failures are often traced to the lack of an effective governance body. Evaluate each of these roles to determine whether it makes sense to engage additional assistance.

| Upgrade Team Resources and Responsibilities | | |
|---|----------------------|---|
| Roles | Required Optional | Responsibilities |
| Steering Committee/ Executive Sponsor | Required | Oversees the project, assigns additional resources and funding if necessary, and decides when the organization is ready. Meets regularly. |
| Project Manager | Required | Manages progress, monitor issues, and so on. |
| Technical Upgrader | Required | Executes the technical upgrade. |
| Testers | Required | Validates the new system. You will need coverage across all implemented processes. |
| System Admin | Required | Manages fixes, patches, and hardware requirements. |
| Support | Required | Responds to issues, particularly right after go-live. |
| Performance Tuner | Required | Gets maximum performance from your infrastructure. Consider contracting with a consultant with specific tuning experience. |
| Developer | Optional | Retrofits custom modifications, if necessary. |
| Trainers | Optional | Trains your end users. These can be power users, outside consultants, and the like. |

Tip #5—Utilize Peer and Oracle Resources

Most organizations sponsor upgrade projects infrequently, so it is important to leverage the experiences of others as much as possible. Use the following links to interact with other users of P6 EPPM:

- [Customer Forums](#)
-  [Facebook/Oracle Primavera](#)
-  [Twitter/Oracle EPPM](#)
-  [Oracle Primavera LinkedIn](#)

Some additional Primavera communities of interest:

- [Oracle Primavera for Brasil LinkedIn Group](#)
- [Oracle Primavera Independent User Group on LinkedIn](#)

Tip #6—Decide When to Change or Add Business Processes

In many cases, there is functionality in the release being evaluated that will help your business improve processes and automate tasks. This can be a small enhancement to business processes you are already using, or larger changes such as the adoption of a new module. One critical decision for your upgrade project is whether you will implement the new functionality as part of the upgrade, or upgrade your current processes without change, and implement new functionality as a follow-on project.

Generally, implementing your current processes in a new system can be a way to mitigate risk in the upgrade project. However, your business realities may preclude this approach, especially if the updated processes native in the software can markedly improve operations. For example, the business may be driving to take advantage of new capabilities as quickly as possible, or it may be more appropriate to modify processes and engage in a coordinated training effort to increase user adoption of the new solution.

By carefully weighing the pros and cons of these approaches, you can choose the best strategy for your organization.

Tip #7—Get Current Product and Upgrade Information

Make sure that you are using available Oracle resources to help you gather current information for your project, and work with Oracle Support for critical case management throughout your conversion timeframe. Oracle has increased its focus on assembling assets to help customers with upgrades, and leveraging these resources will increase your ability to upgrade smoothly.

Oracle maintains several resources to ensure that you obtain the most relevant information pertinent for your upgrade initiative. Several outstanding resources can be located on publicly available Oracle systems. In addition, upon product general availability, the My Oracle Support Product Advisors (formally known as Product Information Centers) is a good starting point for all types of upgrade information. Finally, make sure you get the most current documentation available. Oracle provides several types of documentation to help you navigate a successful upgrade project. These materials can be accessed from the [P6 EPPM Oracle Technology Network](#).

Tip #8—Issues Management

Properly documenting and tracking issues is a key component in their timely resolution. Project leadership should regularly review the issues list and assign ownership. Issues should identify specific applications, forms, and actions. Contact Oracle Support if you believe you are experiencing application issues. Train your first line staff to log cases early and as completely as possible, and include appropriate trace files, environment information, and business and technical milestone dates to help determine case prioritization. The Oracle Support staff and your account team can help in this area.

To ensure that your project progresses as smoothly as possible, Oracle encourages you to understand our escalation policies, and assign Severity 1 (Sev1) issues as appropriate. These issues are typically on the critical path for your go-live, and getting the right focus on their resolution early will give you the best chance of staying on schedule. Depending on several factors including your customization and issue complexity, an escalated issue can take appreciable time to resolve with a fully tested solution, so the earlier the process is started, the better. Sev1 cases should always be logged via [My Oracle Support](#) to ensure complete case detail, but the best practice is to follow-up with a call to Support to ensure the most efficient follow-through.

Even when you encounter noncritical issues (non-Sev1s), it is recommended to log cases via the My Oracle Support site. Cases logged in this way are often resolved faster than calls into the Support Center. This is due in part to the details you can provide online:

- Detailed description of the issue in your own words
- Clearly articulated priority and sense of urgency
- Trace files, screen shots, log files, and other relevant information to help the analyst move quickly on your issue

Project Initiation Considerations

There are a number of things that you can do as your project begins, and even before it formally kicks off, which will ensure that the project has a proper foundation and is well positioned for success.

Tip #9—Prepare the Organization

As you enter the initial stages of an upgrade project, engage the entire affected organization and help them prepare for the work ahead and the changes they will experience. To support this objective, develop a project charter to capture baseline information and areas of understanding. Obtain formal buy-in from the stakeholder organizations and kick off the project in a face-to-face meeting. Formality, visibility to upper management, and team building can be key aids to securing the cooperation and problem solving help you will need as the project progresses.

These discussions should include both the business impact of the change and the associated change schedule. For example, secure agreement on all business blackout periods necessary for system changes.

Tip #10—Ensure the Quality of Your Data

One of the key steps in preparing for a successful upgrade is ensuring that your data is accurate and complete. You should have a standard practice to handle duplicate records, verify data integrity, and ensure the overall health of your data. Use the time before an upgrade to review what practices are in place or need to be created to ensure that your data is relevant and reliable. Ensuring high quality data by using these techniques will aid the effective completion of an upgrade and will assist greatly in the seamless operation of your P6 EPPM solution after the upgrade is complete.

Tip #11—Inventory Your System

All configuration elements of your enterprise system should be inventoried and the current versions should be copied and stored for technical change management control. Upgrading is analogous to moving; before starting, you have to make sure you know where all your belongings are and that they are being handled appropriately. Early in your project, be diligent in gathering this information through composing and completing a preliminary upgrade questionnaire.

Among the key considerations to include in your inventory process should be:

- Customizations, extensions, and modifications
- Localizations
- Interfaces, APIs, and integrations
- Third-party products
- Hardware
- Software releases and patches, including operating system, database, and P6 EPPM applications

Tip #12—Prepare a Go Live Checklist

Once you have completed the initial planning, create a checklist of criteria to guide the ultimate deployment of the upgraded solution. The planning activities should allow you to develop a robust checklist to assess appropriate “go/no-go” decision points. Creating this checklist as soon as possible is a good way to organize project goals, validate your plan, and identify your success criteria before the pressure is on to complete the project. Keep this checklist updated as the project progresses, and document completion times for individual tasks within the checklist.

Tip #13—Understand and Mitigate Project Risks

Early in the project, a risk analysis should be undertaken to determine project risks such as resource contention, other projects going live at the same time, and so on. For risks that have a high probability of occurring and have a large impact, specific mitigation plans should be developed. These plans describe what actions to take if the risk becomes reality. The analysis and plans need to be reviewed on a regular basis throughout the project.

Look for key points of failure, especially in the area of resource loading for your technical and business specialists. If you lack bench strength in any particular areas, develop a plan to supplement and back up critical personnel.

Prepare Your Technical Environment

While many of the activities required for a successful upgrade project involve end users and net change for the applications, you must also manage the changes to your technical environment carefully.

Tip #14—Evaluate Your Architecture

There are several key technological decisions to make that will affect your project. Changing any part of the architecture increases the complexity of the upgrade project, and careful planning is required to determine when to make this change as well as to account for the technical work required. If you are not planning on changing the architecture (although it may be mandatory for you to change your architecture depending on the version of the applications you are on currently), it is important to clarify this throughout your organization and create consensus to minimize disruptions.

It is imperative that these assessments be made early on to remove uncertainty and allow the project team to focus on other upgrade related details.

- **Hardware Platform:** Hardware changes need to be fully considered and evaluated prior to planning your upgrade. Hardware changes will add to the complexity of your project. In many cases the hardware change should take place prior to the upgrade or after the upgrade is complete. If it is determined that the hardware change must take place prior to the upgrade due to data size requirements, CPU capacity, platform age, or the desire to change the complete hardware stack to a different technology, detailed planning of each step must take place after referring to the Tested Configuration document on the P6 EPPM Oracle Technology Network. The Tested Configuration document will indicate which platform will support which versions of P6 EPPM and related tools as well as the hardware drivers and patches required. Typical life expectancy of a hardware platform is 3 to 5 years.
- **Database:** Database requirements generally are a factor in choosing to upgrade. Size requirements and database features will contribute to the decisions made in upgrading the database. High availability and disaster recovery database capabilities continue to improve. These qualities should be evaluated when determining which database platform is right for your business. Refer to the Tested Configuration document when making upgrade decisions. Not all versions of a database are supported by each P6 EPPM release.
- **Middleware:** One of the key decisions is which middleware platform you will use. P6 EPPM supports both the Oracle Fusion Middleware products (WebLogic) as well as IBM WebSphere. In choosing your middleware, be sure to understand the licensing requirements early to ensure that contractual issues will not become a barrier as the project moves forward. The middleware options are feature rich and each should be considered for future growth requirements.
- **Unicode:** Another key decision is whether you will convert your database to Unicode. Most customers have data in a non-Unicode format. There are benefits and costs to each approach. In either case, a clear direction in this area will clarify hardware and project requirements and help you focus on planning a successful upgrade.
- **Web Architecture:** Moving forward, all P6 EPPM products will be 100 percent online, with optional desktop client support. This development creates an enormous flexibility as to where your clients can

reside, but it will also change the requirements in the supporting architecture. Refer to the Tested Configuration document to determine client hardware and software requirements. If remote development is required, this should be taken into consideration to ensure necessary developer access.

Tip #15—Calculate New Hardware Sizing

Given the potential changes to your current system configuration, it is absolutely vital to get an accurate sizing for your new architecture. The combination of expanded P6 EPPM product functionality, technological changes, anticipated changes in the way you use the applications, and possible implementation of new modules could all impact sizing requirements for the upgraded solution. Accurate sizing information will help you decide whether you can reuse current hardware, need to increase hardware resources, or should consider upgrading one or more of your servers. Similarly, sizing considerations are important whether or not you intend to upgrade in place (with potential reuse) or will switch to a new hardware platform during the upgrade process. Performance and load testing can help determine if the hardware is adequate to support your production requirements. For more information, refer to the [P6 EPPM Performance and Sizing Guide](#).

Tip #16—Identify Custom Code and Scripting

Any custom code integrated with P6 EPPM may be impacted during an upgrade. When the upgrade process brings your custom changes into the new target release, it relies on the system code associated with the objects. Objects that are incorrectly coded to system codes will be considered obsolete and not brought forward. To avoid this potential complication, you should make sure that all custom changes are coded properly well in advance of your upgrade project to ensure that these custom changes are brought forward to the target release.

All interfaces and customizations will require extensive testing to ensure that they have not been affected by changes to tables, APIs or Web Services in the upgraded software. Custom responsibilities and menus must be reviewed and potentially updated as well. In some cases, customizations can be removed after an upgrade if new features and functionality satisfy the business requirements previously met by the custom code.

Tip #17—Study and Adhere to Current Tested Configuration Requirements

A critical step in ensuring success is adhering to the technical requirements for your system. This applies to the release currently in production as well as the release to which you are moving. Make sure that you review these requirements early in the project to ensure that you have the right components and understand any updates or changes and how they will affect your upgrade plan. Current information on Tested Configurations can be located on the P6 EPPM Oracle Technology Network.

Upgrade Verification

After the technical upgrade processes are completed, an inventory check should be completed to confirm that all components were updated correctly and are behaving properly.

Tip #18—Implement the Most Current P6 EPPM Release and Patches

In addition to the basic installation steps, it is critical to get “code current” in the new environment before you invest in the testing, configuration, and validation associated with going live. This process requires the most current aggregate fixes to be applied. For all P6 EPPM release upgrades, the current service packs should be installed immediately following the installation of P6 EPPM.

Upgrade Your Data

Once the system is installed, you should turn your attention to data considerations. This step is a critical one in your upgrade success, and often the most time sensitive.

Tip #19—Minimize Application Data to Upgrade

There are several steps to take to prepare your application data for the conversion. The first step is to minimize the amount of data you need to upgrade. If you have a defined archiving and purge strategy for your data, be sure to apply it before the upgrade. If a defined data strategy does not exist in your organization, strongly consider implementing one.

Tip #20—Test with a Copy of the Production Database

Converting your data accurately and efficiently depends on the quality and makeup of the data itself. Working with a current copy of your production data will give you valuable information about how the testing process should be structured, as well as how long it will take to complete. Typically, your first conversion will be the longest and the most difficult.

Copy your production data into your development or prototyping environment before beginning the technical upgrade steps. As you progress through the upgrade project, continue to work with accurate, current data, taking a fresh copy as directed in your upgrade path documentation. This consideration not only ensures the highest data quality, but will provide more accurate upgrade data conversion activity time estimates during performance testing.

Tip #21—Leverage Existing Test Scripts and Plans

To prepare test scripts for use during the testing cycles, begin with the test scripts utilized during the original implementation and augment them to include testing of the new features and functionality. Also consider any modifications needed for process flow changes related to the upgrade.

If these materials do not exist from the original implementation or previous upgrade, create them and store them in a library. This material can save significant time in preparing for upgrade testing.

Tip #22—Perform Index Management

If custom indexes were created for some purpose in your previous release, they will need to be reevaluated and created after the upgrade is complete if they are still determined to be necessary.

Training

While many of the existing skills your team has will serve you well in your upgrade project, it is extremely important to obtain training to learn the new features, business processes, and other changes that will help your staff become more efficient and effective with the new version.

Tip #23—Train End Users on the New Solution

When you first implement the system, your end users must be trained from the ground up to use the new application. However, during your upgrade, you will likely have experienced users who are already familiar with the basics. This fact can both assist and impede your upgrade project effort. Your end users, most importantly those who will be testing the system, must have good information about how the resulting solution will be different, whether the changes are functional, user interface, or technical in nature. These considerations will prevent issues from being reported that are the result of misunderstandings, and better position overall acceptance of the new

solution. Applicable training is available through the Oracle University Web site; additionally, training and informational Webcasts can be found on the My Oracle Support site.

Tip #24—Get Specific Technical Training

The project team and support team must be proficient in the new technologies introduced in the latest release. Team members must also understand the new architecture and performance best practices. An assessment is recommended to reconcile the skills needed to support the development and maintenance of the new release. This consideration is especially critical for a successful upgrade initiative.

Applicable training can be located on the [Oracle University Web site](#); additionally, training and informational Webcasts can be found on the [My Oracle Support site](#).

Tip #25—Optimize Training Processes

One of the best ways to reduce the number of issues you have to track, research, and resolve is to train your users at an optimal timeframe. Although many of the core functional and administrative business processes are similar between releases, training will give your users the information they need to identify true issues from intended changes. As such, the timing of this functional training is important. While you may want key users to be trained early on to give input to the project and assess impact, most users prefer training proximate to going live on the new system so they don't have to remember what they have learned over a long period of time without applying this knowledge.

Post-Upgrade Activities

Once the core technical upgrade has been completed, there are several additional steps to ensure success.

Tip #26—Secure Functional User Buy-In

Functional validation of the system is a key task. Most projects employ functional users, away from their main responsibilities, to accomplish this objective. Though it may be self-evident, if you have functional users complete testing, they must see the value of the process and share the project goals to complete the task effectively. Typically, these resources are setting aside important tasks to participate in the upgrade initiative, so take the time to solicit both management and individual cooperation. Once this cooperation is achieved, ensure that you are allocating enough time to complete a thorough testing cycle.

Tip #27—Testing Scope

A comprehensive testing effort is one of the key steps to finishing the upgrade and going live on the new release. As such, it is important that you consider the testing element of the upgrade as a major software update. Typically, a full, integrated test including user acceptance testing and performance testing is performed to exercise all the business processes the organization will use. You may choose to use automated testing tools; in most cases, this automated approach should be augmented with human testing as well.

Tip #28—Deciding to Go Live

Ultimately, the decision to start running the business on the new solution must be made internally. As you approach the milestone of a new P6 EPPM solution, make sure that the team has enough information to enable a defensible “go” or “no go” decision. The go-live checklist created earlier in the upgrade process should be leveraged to verify that the success criteria have been achieved. Make sure that all affected groups are represented in this decision from both the business and IT perspectives. If you have a formal steering committee, it is the appropriate decision making body. If for some reason there is no steering committee, call a meeting for this

purpose, gathering input from the stakeholders ahead of time and fostering the communication that will allow for an informed and broadly supported decision.

Conclusion

As part of Oracle's commitment to Applications Unlimited, Primavera P6 EPPM continues to evolve, offering greater value and providing new advantages for your business. Upgrading P6 EPPM is key to realizing the maximum return on your Oracle investment.

Each organization must evaluate the costs, risks, and rewards of an upgrade in the same way they would evaluate a new business proposal. This white paper outlines best practices to enhance your upgrade project's success and add value to your organization. As a next step, consider engaging with Oracle Consulting or an experienced Oracle partner to determine your best options going forward. Oracle Consulting is ready to help you analyze, plan, and execute a P6 EPPM application upgrade, in a lead or supporting role, as your organization requires.

Tight integration across Consulting, Development, Support, Education, and Global Delivery puts the entire Oracle team behind your success. To learn more, contact your local Oracle Consulting representative by visiting oracle.com/consulting.