Something big happened over the long Thanksgiving break, and it went really well. It began over a year earlier, and more than 100 Stanford staff played significant roles on the project team that made it happen. The big event was the successful cutover to Oracle Release 12—a major upgrade to the enterprise-wide financial system supporting Stanford. And while the project’s impact to the business of supporting Stanford is significant, the team sought to minimize the impact on our distributed clients using Oracle self-service applications across campus. Early indications are success on both counts.

The significant impacts on the business include the assurance of cost-effective support from Oracle as the previous version of Oracle Financials was at the end of its support life, and implementation of new modules and features supporting improved business processes. Additionally, the timing of the development work allowed incorporation of changes necessary to support foreign activity tracking as now required by IRS regulations. Central Office Procure-to-Pay processes are most impacted, with significant changes to core modules used by Purchasing and Payment Services and Financial Information & Reporting Systems (FIRS) staff. The minimal impact on distributed users included a cosmetic change to some of the Oracle screens, minor changes to iProcurement modules relative to approval routing lists and “favorite” folders, and new location fields to indicate foreign activity, primarily in the iOU module.

While it is simple to summarize the project’s success and benefits to the University, it is quite a challenge to convey the complexity, attention to detail, cross-functional dependencies, and sheer amount of work the project entailed. Project statistics shed some light.

Phases of the thirteen month-long project included planning, requirements definition, development, systems integration testing, user acceptance testing, campus readiness, cutover, and go-live. In addition to Executive Sponsors and Steering Committee members, the project team included staff from Controller’s Office, Purchasing and Payment Services, Office of Sponsored Research, Land, Buildings & Real Estate, School of Medicine, and Administrative Systems Financial Systems Support, Quality Assurance and Technical Services teams; plus teams from Oracle. The number of active team members at any given time during the project ranged from 85 to 100. Activity included:

- 3,012 tests run during Systems Integration Testing
• 3,822 tests run during User Acceptance Testing over a period of 5 months
• 193 issues logged, fixed, verified and closed with Oracle team
• 1,145 Priority 1, 2, and 3 tickets logged, fixed and verified by the project team
• 2,314 total tickets tracked and resolved
• More than 38 financial modules tested
• 4 new Oracle modules introduced
• Over 34,000 hours spent on project prior to cutover

The meticulously planned 5 ½ day intense cutover period began at noon on Tuesday, November 23, and followed an hour-by-hour calendar of scheduled tasks and hand-offs. Major targeted milestones included:

• Tuesday, noon, upgrade starts
• Saturday, 4:00 am turnover of Production to Administrative Systems (AS) Team for validation
• Sunday, 6:00 am turnover of Production to Business Team for process validation
• Sunday, 8:00 pm final checkpoint meeting (multiple check-point meetings held daily during cutover)
• Sunday, midnight start of regular nightly processing
• Monday, 6:00 am, Release 12 Production live

So how did the aggressively staged cutover go? On Thursday, November 25, at 5:00 pm, just over two days in to the 5 ½ day event, Larry Dillard of AS Financial Systems Support, reports to the team, “We are one day ahead of schedule.” By Saturday at 7:00 pm, word goes out that, “AS validations are wrapping up with only a few modules remaining.” By 10:00 pm Saturday, AS turns Production over to the Business Teams, allowing their work to begin a full half-day early. Culminating event: Sunday, November 28, 8:40 pm, Claudia Dencker, Project Planning and Quality Director responsible for external communications to stakeholders and executive sponsors, sends the email message, “We are LIVE!” a full 9 hours ahead of schedule!

Postscript: as with most projects, and arguably any of this magnitude, the unanticipated will occur. Shortly after go-live, a hardware failure--unrelated to the upgrade--brought Oracle Financials down for approximately 24 hours. The unfortunate timing of this unrelated event so soon after the smooth and successful cutover, does not, however, diminish the project team’s laudable accomplishments.

Undoubtedly, the project’s success is attributable to a combination of the professional project planning and management, the quality and dedication of team members, and the sheer amount of effort put forth. Congratulations!