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# insight

FALL 2015

THE OFFICIAL PUBLICATION OF THE  
ORACLE APPLICATIONS USERS GROUP

**MOBILE  
APPLICATIONS  
FOR ORACLE  
E-BUSINESS  
SUITE**  
**14**

**ORACLE BI ANALYTICS  
IN 90 DAYS**  
**22**

**FINANCE CLOSE:  
GET YOUR TIME BACK**  
**26**



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There are lots of lessons learned in this issue of *OAUG Insight* magazine. Find out what Geokinetics discovered in deploying and using mobile applications for Oracle E-Business

Suite (page 14). Get a glimpse into a fast-track implementation of Oracle Business Intelligence Applications (OBIA) along with an ERP implementation at Worthington Industries (page 22). Take a look at month-end close processes and practices at Dell (page 26). And learn how Invesco found a better way to manage and track SRs across multiple Customer Support Identifiers.

Don't forget the other OAUG member resources that are also brimming with lessons learned. The Conference Paper Database is available 24/7. OAUG eLearning presents live and recorded webinars. Geographic (Geo) and Special Interest Groups (SIGs) activities are happening throughout the year. And OAUG conferences and events are high-energy venues for education and networking. Visit [oaug.org](http://oaug.org) to explore a variety of resources. ♦

*Feel free to contact me at [cforce@oaug.org](mailto:cforce@oaug.org) if you have ideas to share or wish to suggest a topic for a future edition of *OAUG Insight*.*

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More than 100 Geos or SIGs serve specific geographic regions or focus on particular industries, Oracle product families or technical and functional roles, providing a unique opportunity for participants to learn about the creative ways others are solving problems, generating new ideas and influencing Oracle. The unflagging dedication of our Geo and SIG leaders keeps the content fresh and the discourse brisk. The peer-to-peer networking is exceptional. The insights

gained from those who have “been there, done that” are invaluable. The OAUG's Geos and SIGs make it easier to fulfill your continuous learning responsibility.

As this issue of *OAUG Insight* magazine goes to print, many Geo and SIG leaders are finalizing their agendas for Oracle OpenWorld 2015 in San Francisco. While Geos meet in their regions periodically, face-to-face gatherings of so many groups representing the greater Oracle users community are rare. If you'll be attending Oracle OpenWorld 2015, plan to enliven your week by attending one or more of the OAUG-hosted Geo or SIG meetings during the Oracle Users Forum on Sunday, October 25. Everyone is invited. See page 36 for more information about OAUG activities at Oracle OpenWorld 2015. ♦

Contact me by email at [menglish@oaug.org](mailto:menglish@oaug.org) if you have suggestions or questions regarding the OAUG's Geos and SIGs.

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# SHARE the Link SHARE the Wealth

If you're reading this note, you are obviously holding a copy of the newest *OAUG Insight* magazine. I didn't need to tell you that, of course. You're a subscriber and likely look forward to receiving your issue of the magazine every quarter.

As you know, *OAUG Insight* magazine is a platform for OAUG members to share their practical tips, tricks and real-world experiences with Oracle Applications. Authors might explore their journey through an upgrade or new implementation, their deployment of new modules or features to streamline a process, their application of technology to support growth, their use of Oracle's own support tools or resources to solve problems and much more.

In addition to compelling articles from fellow Oracle Applications users, *OAUG Insight* magazine also brings you updates on OAUG educational programming, conferences and events, new and improved member benefits, Geographic (Geo) and Special Interest Group (SIG) activities, news from Oracle and insights and guidance from experienced providers of services and solutions to the Oracle users community.

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*Feel free to contact me any time at [shughes@oaug.org](mailto:shughes@oaug.org) with general questions or suggestions.*

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The OAUG Star Partners are a vital force in supporting the OAUG's mission of providing Oracle Applications users the tools required to enhance their productivity, maximize their investment, and influence the quality, usability and support of Oracle Applications. Participants in the OAUG Star Partner Program represent some of the most experienced and most successful providers of services and solutions to the Oracle users community.

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## TWO-STAR ELITE



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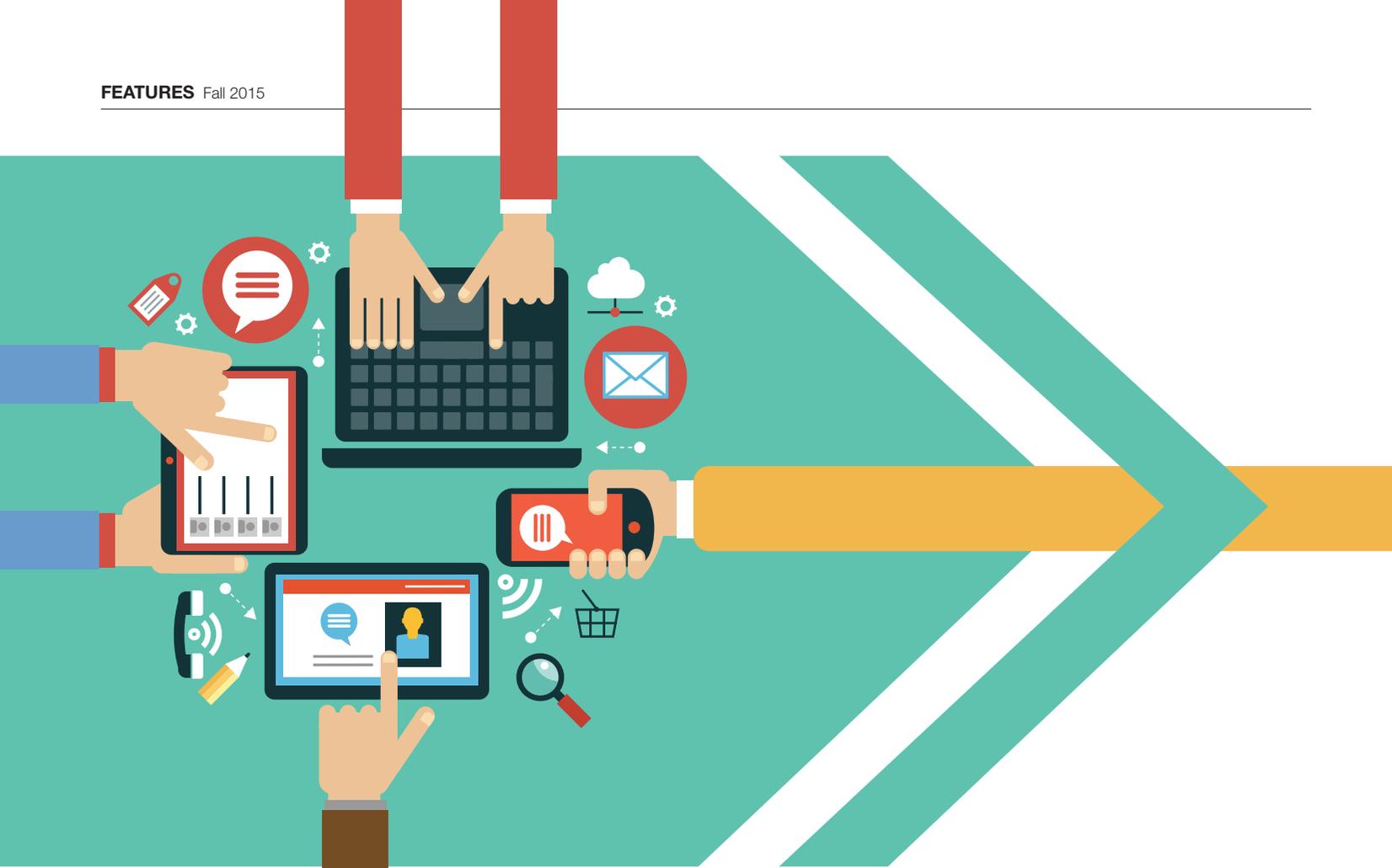
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# MOBILE APPLICATIONS *for* ORACLE E-BUSINESS SUITE

KETAN THANKI, GEOKINETICS

This is a case study about Geokinetics' experience in the deployment and use of mobile applications for Oracle E-Business Suite (EBS). These applications are an extension in the use of various modules of Oracle Applications. Oracle Corporation has released several applications and is in the development phase of releasing more applications in the future. This presentation covers research, implementation, challenges, recommendations and leading practices on deploying these mobile applications.

Geokinetics is a privately held company that specializes in seismic data survey and acquisition.

Geokinetics also performs seismic data processing and interpretation as a service for its customers. It is headquartered in Houston, Texas, with offices in 10 countries and about 3500 employees.

### Geokinetics' ERP and Application Landscape

Geokinetics is running Oracle E-Business Suite (12.1.3) and has rolled out the following modules:

- Financials, HR, Projects.
- Self-Service (iProcurement, iExpense, Time and Labor).
- iSupplier Portal (external facing).

About 450 users access the applications globally. Geokinetics implemented these mobile applications for EBS:

- Fusion Expenses (iOS & Android).
- iProcurement (iOS).
- Procurement (iOS).
- Project Manager (iOS).
- Timecard Entry (iOS).
- Approvals (iOS).

Geokinetics also has the following applications and configuration:

- Three languages enabled: English, Spanish, Brazilian Portuguese.
- Hyperion Essbase, HFM and FDM.
- EiS Reporting Tools: EiS Express, GL Connect, XL Connect, Dashboards.
- Oracle Single Sign-On: Integrated with Active Directory.

### Business and Use Case for the Mobile Applications Rollout

**The business case for rolling out the mobile apps:**

- Mobility to be accessible to users in remote locations. Due to the nature of its business, most self-service users were out in the field in remote locations. The most they would have is a cell phone connection. These applications needed to work on smartphones.
- Faster implementation timeline. Due to the continuous nature of operations for the company, we did not have the luxury of long implementation cycles.
- Faster decision making process. It was important to provide the most relevant data to ensure operations crews are able to make faster decisions on procurement,

project management or spend-related items for a specific project.

- Low cost license and implementation. There was no budget toward the procurement of licenses and implementation cost for mobile applications.

**The use cases for the mobile apps:**

- An application that has the basic functions of a business process easily accessible from a mobile application.
- A simpler, user friendly interface (UI). Due to the complexity of the core forms of Oracle, the operations team was reluctant to use the core application, therefore an application with a simpler UI was preferable by the users.
- A seamless and error-free integration with the core application that cuts down on errors and incorrect information/data.
- A platform where users deal with transactions that are exceptions only and does not clutter the system with unwanted data.
- The ability to contact the relevant party directly from the mobile device.
- Mobile platform agnostic solutions, since there is a mix of mobile platforms that the users regularly use, including iOS and Android devices like smartphones, phablets, tablets, etc.
- Real-time information that does not require any process to be run before appropriate data is available.

The mobile apps identified and rolled out at Geokinetics met each of the above business and use cases.

For a full list of mobile apps available for Oracle E-Business Suite (as of Feb 2015), reference Oracle E-Business Suite Mobile Apps Administrator's Guide for Release 12.1 and Release 12.2 (Doc ID 1642431.1) on My Oracle Support.

## Modules and Mobile Apps in Scope for Implementation at Geokinetics

EBS Module	Mobile App	Capability	Type of App
iExpense	Oracle Fusion Expenses	Actionable	Horizontal
Projects	Project Manager for EBS	Inquiry	Line Of Business
Approvals	Approvals for EBS	Actionable	Horizontal
Purchasing	Procurement for EBS	Inquiry	Line Of Business
iProcurement	iProcurement for EBS	Inquiry	Line Of Business
Time Entry	Timecards for EBS	Actionable	Horizontal

The applications listed above are categorized by their capability. The applications that have 'Inquiry' capability can only be used for limited inquiry of the type of data relevant to the app. The 'Actionable' apps allow the user to enter a transaction within the app.

### Applications Implemented

#### iOS

- Oracle Fusion Expenses – September 2014 (Version 3.1).
- Project Manager for EBS – Feb 2015 (Version 1.1).
- Approvals for EBS – Feb 2015 (Version 1.1).
- Procurement for EBS – Feb 2015 (Version 1.1).
- iProcurement for EBS – Feb 2015 (Version 1.1).
- Timecards for EBS – Feb 2015 (1.1).

#### Android

- Oracle Fusion Expenses – Feb 2015 (Version 1.1).
- Project Manager for EBS – Mar 2015 (Version 1.2).
- Approvals for EBS – Mar 2015 (Version 1.2).
- Procurement for EBS – Mar 2015 (Version 1.2).
- iProcurement for EBS – Mar 2015 (Version 1.2).
- Timecards for EBS – Mar 2015 (1.2).

The goal for Geokinetics Inc. was to continue to implement either Android or iOS apps as they become available.

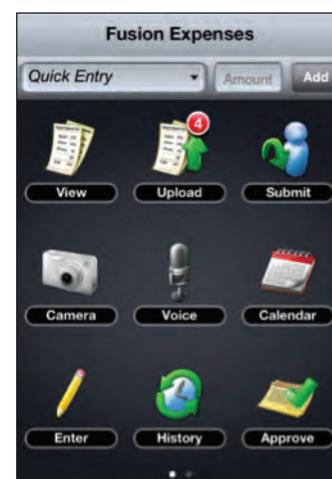
### Application Overview

This sections details the various apps and their capability.

#### Fusion Expenses

- A user-friendly screen allows entry of expense reports from a mobile device. The layout is clean and only requires a user to input values to the most commonly used fields.
- Offline mode allows the user to use the application while on the road. The only time a VPN connection is needed is when an expense report needs to be submitted.
- Project and task-related expenses can be entered.
- The history of all expense reports submitted in the past (through the app) can be viewed in the app. Expense reports submitted from the desktop do not display on the app.
- The user has the capability to synchronize metadata and transactions as needed as per their connection, convenience and frequency.
- A scanned receipt can default most information into the relevant fields of an expense report as long as the receipt is printed and legible.
- The scanned receipt can also be attached to the expense report line or at the header.
- Users can save the expense lines on the road and then consolidate and submit one expense report for the trip.
- Expense reports submitted from the mobile device are visible and accessible from the desktop application.

- By default, expense reports go to the employee's supervisor for approval. Unlike the desktop application, there is no option to change the approver on the mobile app.
- The supervisor is notified of the pending approval of the expense report and can review the expense report from the app.
- The supervisor can approve (or reject) the expense report from the mobile app.
- Expense policy checks are performed at the server level. In case of violation, the expense report is saved for further action by the user.



**Note:** There is no effect to the corporate credit card integration.

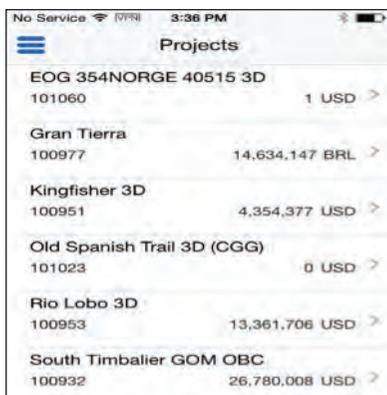
## Project Manager for EBS

This app assists with getting an overview of the projects the user is a key member of. The app is linked to the Projects suite of applications within EBS. This is an 'Inquiry' type of app. The features of the Project Manager App for EBS provide:

- An overview of the project from the summary page.
- Cost Budget:
  - Track budgeted cost (assuming budgets are uploaded).
  - Track progress of actual spend against the above budget.
- Revenue Budget:
  - Track progress of budgeted revenue to date.
  - Track progress of actual revenue to date compared to budget.
- Overview of open and past due AP invoices.
- Overview of open and past due AR invoices.
- Overview and drill-down into open issues.
- Overview and drill-down into open change orders.
- A list of project team members and the ability to contact them via email, phone or messages.
- Customer overview and contact information.
- Any member of the project who has access to the respective Oracle responsibility and is also a key member of the project can view the above information.
- Single screen to view projects from different countries. If a user has access to multiple OU's and responsibilities, all the projects that they are a team member of would be visible to them on the summary page.

## Requirements/Conditions

- Need to be a project team member to view project-related information.
- Need to have access to a project and the relevant Oracle responsibility for the specific OU.
- Need the budgets for Revenue and Cost to be updated/uploaded for the budgeted numbers to be displayed.
- Need to run (or schedule) project summarization process before the actual numbers are displayed.
- Need to update actual percent of work completed for each project before the planned progress is displayed.



Project Name	Project ID	Budgeted Amount
EOG 354NORGE 40515 3D	101060	1 USD
Gran Tierra	100977	14,634,147 BRL
Kingfisher 3D	100951	4,354,377 USD
Old Spanish Trail 3D (CGG)	101023	0 USD
Rio Lobo 3D	100953	13,361,706 USD
South Timbalier GOM OBC	100932	26,780,008 USD

## Approvals for EBS

The Approvals App allows a user to get a consolidated view of pending notifications. This is an 'Actionable' type of app that allows users to take action on notifications from a single app and view past notifications and their history. Additional features of the application include:

- Approve various Oracle Applications notifications from one app.
- Types of notifications that can be actioned from the app:
  - Expense Reports.
  - Purchase Requisitions.
  - Purchase Orders.
  - iRecruitment – vacancies and job offers.
- View past approvals (action) history.
- Notifications can be approved or rejected, or additional information can be requested.
- Additional information requested on a notification shows up as a pending item and can be responded to from the app.

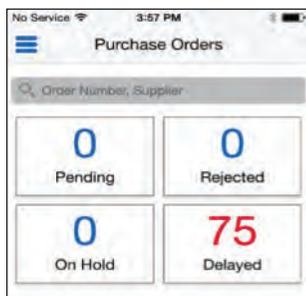


## Procurement for EBS

The Procurement App is linked to the Purchase Order module within Oracle EBS. This is an 'Inquiry' type of app that provides an overview of purchase orders (PO) and allows the user to review the status of each. The app also has a robust search capability for a PO. Additional features of the app include:

- This app is primarily designed to be used by the buyers. The initial screen gives them an overview of pending, rejected, on-hold or delayed purchase orders, which facilitates fast action and quicker resolution of pending items.
- Users with the 'Inquiry' level of access can also use this application. In the case of Geokinetics, users in the field and operations were able to query purchase orders.
- Review pending, on-hold, rejected or delayed POs. Since buyers are able to get an overview of each of the above status of a PO, they are able to act on it fast and have a quicker resolution on pending items.
- Users can drill down into each of the different status of POs and take action as appropriate.
- The approval status of a PO can also be reviewed and acted upon.
- The app provides the ability to contact approvers from the app, with contact information (message, phone and email) updated in Oracle HR.
- Users with 'Inquiry' access can also contact the buyer on the PO.
- The app provides the contact details of suppliers and the ability to contact them directly.

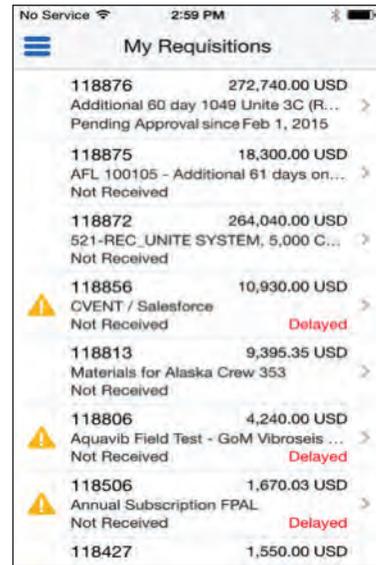
- The complete approval history of the PO can be viewed and tracked.
- The app provides the capability to drill down to the lines and review additional information for the specific line.
- The app provides the capability to drill down to the shipment level of each PO, including the requisition number, if any.
- If there are exceptions related to a specific shipment, they are highlighted by the app.
- The app provides the ability to review the quantity ordered, received or cancelled for each PO shipment.
- Ability to query any PO based on PO number, supplier, buyer, PO line description, requestor, item description, order from and to date, approval status, operating unit or requisition number.



**iProcurement for EBS**

The iProcurement for EBS App is linked to the Purchase Requisition and Purchasing module (requisition functionality) of Oracle EBS. This is an 'Inquiry' type of app that provides an overview of all requisitions created by the user along with the approval history and line level details. Features of the app include:

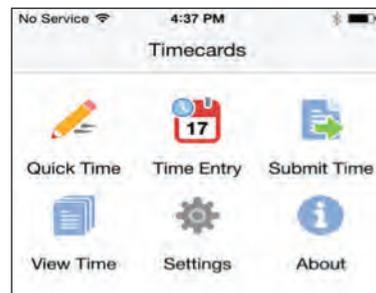
- The application provides an overview of the requisitions the user has created.
- The user is able to get line level details of the requisition.
- The user can access project-related information for a project requisition, including information about project, organization, expenditure type and task fields.
- The user is able to review the list of requisition lines delayed beyond the need-by-date.
- The user can also get information about the PO lines and shipment details.
- The app provides the capability to contact the approver, buyer or supplier associated with the requisition/purchase order.
- The app provides the capability to review the approval status of a requisition.
- The app provides the complete approval history of the requisition notification.



**Timecards for EBS**

This app is connected to the Oracle Time and Labor module within Oracle EBS and allows a user to enter time, either exception or worked. This is an 'Actionable' type of app. Features of the app include:

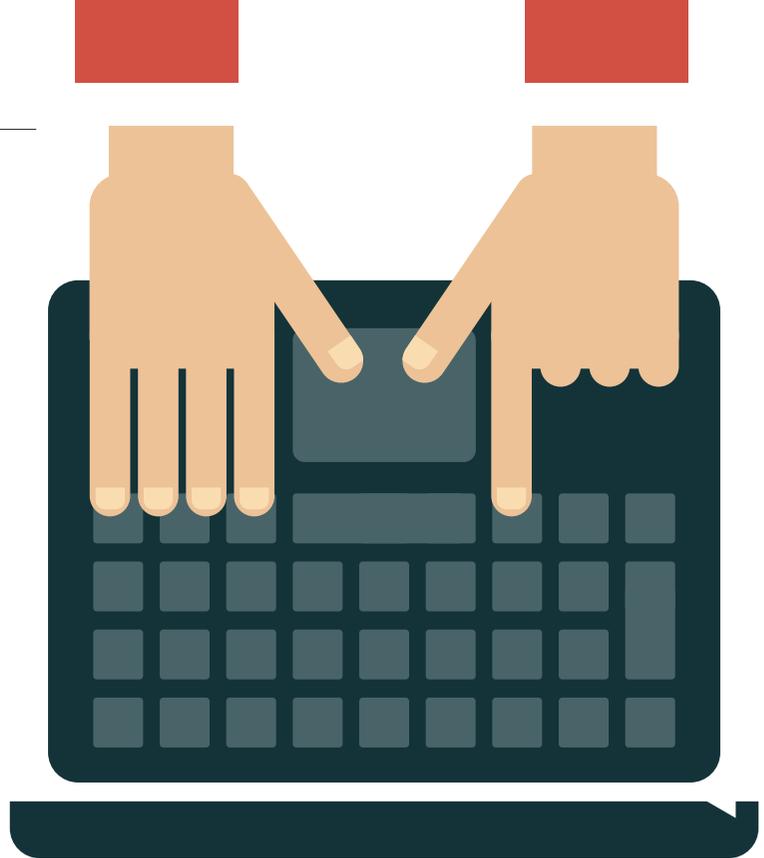
- A user can enter time that is either worked or exception. The application provides the same fields as those that are available in the self-service time card layout.
- The Quick Time entry option makes it possible to enter time in fewer clicks. This feature is mostly used to enter exception time.
- Once a timecard is entered and saved, the user can submit the timecard for approval.
- The application supports custom layouts for entering time and charging it to specific custom fields. The user is also able to enter time for a project and task.
- Any time entered in the past can also be viewed by the user.
- The same error messages defined and displayed in the desktop time card entry form are displayed on the mobile app if a time entry rule is violated.



## Implementation Challenges

As an early adopter of the mobile applications for Oracle EBS, Geokinetics found itself at the bleeding edge of this technology. We had to create several SRs to resolve the errors we encountered. Most apps did not work out of the box. We had to make several configuration changes, after the patches related to the apps were applied and relevant configurations were completed. Below is a summary of the challenges Geokinetics encountered:

- All apps were primarily released on the iOS platform. Users on the Android platform were unable to use the applications. The Fusion Expense App was released about six months after the app on the iOS platform was released. Several other apps were not yet available on the Android platform at the time of initial deployment (Feb 2015).
- Often it is difficult to troubleshoot issues faced by remote users. They describe the issue then take screenshots and send them to the IT team. Most apps now provide the feature to turn on logging, which allows users to send log files for debugging the issue and providing a resolution.
- Several users were initially skeptical of the usability of the applications. The adoption rate has been a bit slow. Several of the management team have adopted the Expenses, Approvals and Projects Manager Apps.
- Geokinetics ran into several bugs for early adopters on the apps. Most of them were pertaining to connection and login issues. Once we resolved the connection and login issues, the applications started working without any errors. It took us a long time to resolve these issues.
- Initially, there was a lack of documentation on the mobile apps, which left us unaware of the solution on issues, the functionality and the capability of the apps. Most of the features listed in this article are listed from the experience of using the apps.
- There are no user guides that describe the capability of these apps.
- Most notes did not have a release update history on the apps. Hence, when a note was updated, we had no idea what was updated on the note. The recent updates (Jan 2015 onward) now have that information available.
- Several error messages did not have enough description or an appropriate message, making it difficult to understand the root cause of the issues encountered.
- Several apps also lacked the capability to generate log files.
- Several apps (Procurement, Projects, Timecard Entry) would freeze upon login.
- More coordination between Development and ATG Teams was needed to resolve bugs. The errors pertaining to the screen freezing were resolved by working with the ATG and App development teams. The login errors were also resolved by the ATG team. One SR was created for each app that was not working.
- The customization on the Requisition Workflow was not visible in the app. Several of our users attach documents to the requisitions. Since the attachments do not display on the requisition approval



notification in the Approvals App, the users did not find it useful to use the app for requisition approvals.

- Several approval types are missing from the Approvals App: AP Invoice, Timecards, Journal Entries, Order Management, Work orders, etc.

## Implementation Considerations

The following implementation considerations should be kept in mind before rolling out the mobile apps. These are the ones Geokinetics encountered. There could be others that were not in Geokinetics' scope for deployment.

- The location of the users becomes critical if the users encounter errors. Proximity to the support team enables faster issue resolution.
- If the users are in a location that does not have appropriate internet connectivity, they would be unable to connect to the VPN when needed.
- Consider the mix of mobile platforms and the form factors that the users are on. Depending on the need and the demand for the platform, a company may or may not be able to roll out the apps, especially if they are an early adopter. This is no longer an issue for companies having users on Android and iOS platforms.
- The order of app implementation may make a difference. Users are likely to find the 'Actionable' apps (Fusion Expenses, Time Entry, Approvals, iProcurement) more useful than the 'Inquiry' type of apps (Procurement and Project Manager). It depends on the specific needs of the business.
- Often, the user expectation of the application functionality is higher than what the app can provide, especially in the initial phases of the application rollout. It is important to manage user expectations to avoid disappointment and lack of adoption of the app.

- The apps currently do not support multiple languages. Language-related patches could not be found. At Geokinetics, the application is deployed in English, Spanish and Portuguese.
- If the EBS instance is on a single sign-on (SSO) environment, ensure that the users remember their password to log in to EBS. There is no SSO capability within the app. One of the options Geokinetics is considering is to keep the Active Directory and EBS

passwords in sync. That way, the users do not have to remember a separate password that could be different from their Active Directory password.

- If the application is installed in the De-Militarized Zone and available externally, ensure additional security settings are adhered to.

### Lessons Learned

As part of the rollout of the mobile apps at Geokinetics, taking care of the following items would have made the rollout smoother:

- Ensure the latest version of mobile apps are installed/updated: While the newer versions of the patches were released, newer versions of the applications were also released. The newer versions of the patches had to be tested with the newer versions of the apps, simultaneously.
- Ensure apps tier is configured appropriately: The apps tier setting/configuration needs to be as recommended by the administrator's guide. The presence of an unwanted .jar file in the incorrect folder on the apps tier caused the apps to freeze after login as well as error messages at the time of login to the app.
- Ensure VPN connectivity is enabled for all mobile apps users: Pay special attention to those who generally do not connect to the VPN. Accessing the metadata and syncing the data on these apps needs to have VPN enabled if the apps tier is behind the firewall.
- Test thoroughly: As with any other app, ensure thorough testing is completed and that the business and use cases are met by the respective apps.
- Roll out to a pilot group of users first: Always roll out the apps to a select group of users. This will assist with ironing out any

issues with app connectivity and specific use cases that the users expect.

- Larger group rollout after all issues resolved with pilot group: The applications can be rolled out to a larger group of users after a successful test run by the pilot group of users. This approach will minimize issues with the larger group of users and may encourage more adoption among the users.
- Provide adequate user documentation on:
  - o VPN setup and connection: Ensure the users have exact steps to configure VPN settings on the mobile device and then steps to connect to the VPN. The connection settings are different for iOS and Android devices.
  - o App installation: Provide steps for downloading the appropriate app, installation and the configuration of the application for first time use. The application needs the EBS URL to download the configuration file and enable login.
  - o App features: Provide the app features to the users in a user guide.
  - o Troubleshooting tips: Provide steps to troubleshoot the app errors, specifically on connection and login. Most of the apps have a login feature and can be enabled by the user on their device easily.



### Other Related Setups

The following setups are needed for the mobile apps to work successfully:

- Validate the configuration for any errors or validations.
- Each responsibility associated with the respective module of the app must be configured for mobile applications by assigning the responsibilities (including custom) to the appropriate roles.

### Document References

- Oracle E-Business Suite Mobile Apps Administrator's Guide for Release 12.1 and Release 12.2 (Doc ID 1642431.1).
- Master Document - Oracle E-Business Suite Mobile Apps, Release 12.1 and 12.2 Documentation (Doc ID 1641772.1).

**Application Specific Documents:**

Below is a list of all mobile apps released by Oracle (as of Feb 2015) with their respective notes from My Oracle Support.

Mobile App Full Name	Apps Store Name	MOS Note
Oracle Mobile Approvals for Oracle E-Business Suite	Approvals for EBS	Note 1642423.1
Oracle Fusion Expenses	Oracle Fusion Expenses	Note 1625446.1
Oracle Mobile Timecards for Oracle E-Business Suite	Timecards for EBS	Note 1669224.1
Oracle Mobile iProcurement for Oracle E-Business Suite	iProcurement for EBS	Note 1928459.1
Oracle Mobile Sales Orders for Oracle E-Business Suite	Sales Orders for EBS	Note 1928878.1
Oracle Mobile Inventory for Oracle E-Business Suite	Inventory for EBS	Note 1924687.1
Oracle Mobile Product Information for Oracle E-Business Suite	Product Information for EBS	Note 1921103.1
Oracle Mobile Procurement for Oracle E-Business Suite	Procurement for EBS	Note 1928462.1
Oracle Mobile Project Manager for Oracle E-Business Suite	Project Manager for EBS	Note 1923215.1
Oracle Mobile Discrete Production Supervisor for Oracle E-Business Suite	Discrete Production Supervisor for EBS	Note 1916995.1
Oracle Mobile Process Production Supervisor for Oracle E-Business Suite	Process Production Supervisor for EBS	Note 1929354.1
Oracle Mobile Project Manufacturing for Oracle E-Business Suite	Project Manufacturing for EBS	Note 1929669.1
Oracle Mobile Maintenance for Oracle E-Business Suite	Maintenance for EBS	Note 1923702.1

**Note:** Since this article was written, Oracle has provided configuration information on installing the apps tier in the De-Militarized Zone and the relevant configuration needed to enable users connecting to the mobile apps from outside of the company's network. Oracle has also vastly improved the documentation surrounding the overall mobile apps administration as well as application-specific information since our rollout of the applications ♦

*Ketan Thanki is the Director of Enterprise Applications at Geokinetics. He is also a current Board Member of the OAUG and also serves as the Treasurer. He has more than 16 years of experience working with Oracle Applications.*

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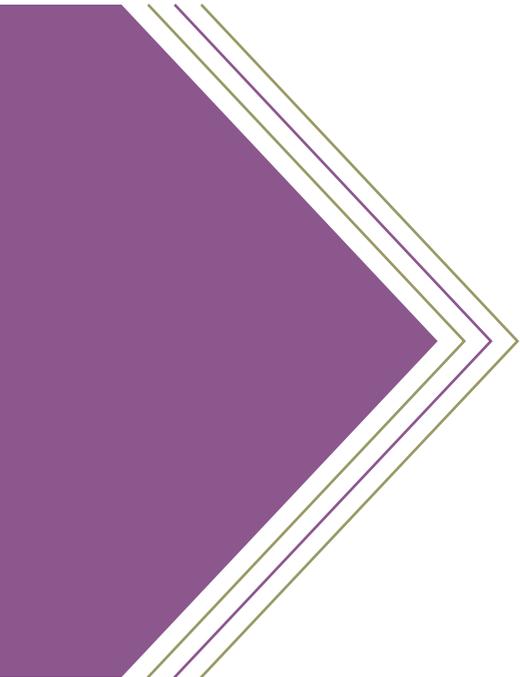
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# ORACLE BI ANALYTICS IN **90** DAYS

GET THE VALUE RIGHT AWAY.

TUSAR DAS, WORTHINGTON INDUSTRIES

Implementing Oracle Enterprise Resource Planning (ERP) is always a challenge, and expensive too. Implementing Oracle Business Intelligence Applications (OBIA) along with an ERP implementation may become even more challenging as the business must adopt ERP and learn a new way of analyzing data.

But if done, this data can provide an up-to-date status of the health of the organization at any moment. Therefore, it is very important to consider the impact of implementing analytics/reporting systems along with an ERP implementation.

This article provides insight into how Worthington Industries successfully implemented OBIA along with an ERP implementation. We will also explain how Oracle's BI Analytics can be implemented in 90 days for getting the value right away.

## Background

In 2012, Worthington Industries acquired Angus-Palm industries, an operator cabs manufacturing company that was later

rebranded as Engineered Cabs. Engineered Cabs was using multiple installations of outdated, unsupported ERP, which did not support the strategic objectives of the business unit and was incapable of providing an integrated view of multi-facility operations. In order to improve the operational and reporting capability and visibility of the Engineered Cabs business unit, it was determined that a new ERP system along with a reporting system was required to manage the business.

## Oracle EBS at Steel and Engineered Cab

Worthington was not new to Oracle technology; it had implemented around 20 Oracle E-Business Suite (EBS) modules in its steel business unit. The original deployment



started in 2004 and was completed in 2007 in 11 locations. Because of various business reasons, EBS was heavily customized. To support the reporting need, Worthington also developed a custom data warehouse solution. Over time, we developed 3000+ Cognos reports and several dash boards.

It was a big challenge to maintain and upgrade a heavily customized ERP and reporting system, so we were searching for a better option. We decided to implement Oracle EBS and OBIA on separate instances

with no customizations. It was not an easy journey to implement vanilla Oracle EBS, but in the end, it was worth it. We went live at our first facility in 2014 with EBS R12.1.3

### What is OBIA?

Oracle Business Intelligence Applications (OBIA) are packaged business intelligence (BI) solutions for ERP. They allow organizations to deploy BI on a small scale for a single department and then expand seamlessly to support other departments using the same model and platform, delivering a consistent view of enterprise information.

### Why OBIA?

One of the biggest challenges for today's IT department is maintaining steady ERP performance; over time performance degrades when the reporting demand increases. Out-of-the box ERP reports always run against transaction data. Most of the time that is an unnecessary load on the ERP system, which causes performance issues. It does not always need real-time data. There are several BI tools available in the market to choose from, including developing your own data warehouse but they all come with their own challenges, such as:

- Time to develop and deploy.
- Drill-down capabilities.
- Duplication of reports.
- User training.

The purpose of OBIA is to help minimize the problem and give you a head start.

- Quicker time to deploy.
- An enterprise view of data from day one.
- Role-based security out of the box.
- Built-in best practices.
- Reduced custom reports out of ERP.
- Reduced performance impact on ERP.

When Worthington implemented Oracle EBS for its steel business unit, we did not have a BI/data warehouse application from day one. That resulted in developing several custom reports running on the ERP system. Over time, we ended up developing several custom reports and maintaining sizable staff to support our steel data warehouse,

so we were looking for different options to satisfy the reporting and BI needs of the Engineered Cabs business unit. OBIA seemed to satisfy our need, so we opted for that.

Once OBIA is implemented, IT does not have to develop and maintain many new metrics, as they are already prebuilt in OBIA. Business users can modify or build many of their own reports, reducing the need of IT requests for new data extract or reports. Since it is a packaged solution, you can upgrade OBIA instead of having to re-write or modify ERP reports.

### Approach to Stand Up OBIA

We started our ERP implementation project in January 2014 by building a separate instance for the Engineered Cabs division, keeping customization out and minimizing complexity. During CRP I of the ERP implementation, we realized that we had to do something to satisfy the growing demand for reporting that is not satisfied by Oracle EBS. Hence, we decided to start a parallel project to implement OBIA on its own instance for the Engineered Cabs business unit. Following are some key ground rules that drove the project:

- Vanilla implementation.
- Out of the box role-based security.
- No custom reports or customizations to dash boards.
- Leverage Oracle for hosting and implementation.

### Planning

To ensure maximum efficiency, the following questions were considered:

- How do we increase the organization's agility?
- How can we foster cross-functional collaboration?
- How do we push adoption of best-practice KPI's?
- How do we increase the organization's resilience?
- How do we provide metrics that span functional and data silos?
- How do we execute both projects in parallel?
- How do we leverage expertise from both teams?
- Decision on transaction report verses analytic report?
- Fit-gap analysis?
- New report requirements?

### What to Pick?

Based on our need, we picked the following adaptors to pull data from Oracle EBS to provide us the analytics. Here is the mapping between Oracle EBS and OBIA.

OBIA: Analytics Adapter	EBS Modules Covered
Oracle Procurement and Spend Analytics Fusion Edition	Oracle Purchasing/Procurement
	Oracle iProcurement
	Oracle Financials (Payables)
	Oracle iExpense
Oracle Financial Analytics Fusion Edition	Oracle Financials (GL, Payables and Receivables)
Oracle Supply Chain and Order Management Analytics Fusion Edition	Oracle Order Management
	Oracle Financials (for Revenue and Receivables)
	Oracle Discrete Manufacturing (for Inventory)
Oracle Manufacturing Analytics	Oracle Discrete Manufacturing and/or Oracle Process Manufacturing (Work In Process, Inventory, Quality and Costing modules)

### Selecting the Right Partner

Selecting the right partner for an OBIA implementation is imperative for a successful project. Implementing OBIA during an ERP implementation will require a cross-functional team with the BI expertise to perform the technical implementation as well as both functional and technical knowledge of the ERP system to perform fit-gap analysis, define new reporting requirements and perform the data validation between ERP and OBIA.

An ideal partner should also have expertise in the key functional areas of ERP, data warehousing and OBIA. This allows for teams to collaborate from start to finish in the implementation of both ERP and OBIA. We partnered with OMCS to provision, host and implement OBIEE for us.

### Execution

A new Oracle instance was provisioned with Informatica, Oracle Business Intelligence Enterprise Edition (OBIEE) and DAC pre-installed. OBIA was installed on the Windows machine and we performed the following required configurations:

- Informatica Connection.
- Informatica Source and Lookup file.
- Informatica Patch application.
- DAC container creation.
- DAC parameter setup.
- DAC Execution Plan creation.

- OBIEE connection.
- OBIEE Init blocks and variables.
- OBIEE Groups and Roles configuration for security provision.
- Running the required scripts on top of the new ERP.
- Applying the required OBIA patches on ERP.

We have taken the necessary functional help from our finance, procurement and spend, manufacturing and supply chain business users in order to configure the source (EBS) and lookup files. We have also scheduled the DAC extract, transform and load (ETLs) to be run on a nightly basis. Full data was loaded from the ERP. We have unit tested the instance by making sure there are no errors in the ETLs and out-of-the-box dashboards.

We made sure that source data is available in the ERP to make sure the out-of-the-box dashboards are populating data. We utilized Oracle Application Testing Suite (OATS) to load data in Oracle EBS. Navigation and dashboard training were provided to the business users. Initial security was created in OBIEE directly. Later, after go-live, we implemented AD integration, i.e., security is tied to your Windows. Two more instances were later created for Dev and Prod respectively. The first instance was taken as base (designated as QA instance) and the other two instances were refreshed from this. This approach saved us time to provision. Post migration, the following operations were done on both instances: connection changes to point to the right ERP instance, scheduling of ETLs at 3 a.m. ET, and full load and then validation of dashboards to make sure data is available.

### Architecture Implemented

We have implemented the standard architecture recommended by Oracle (See Figure 1).

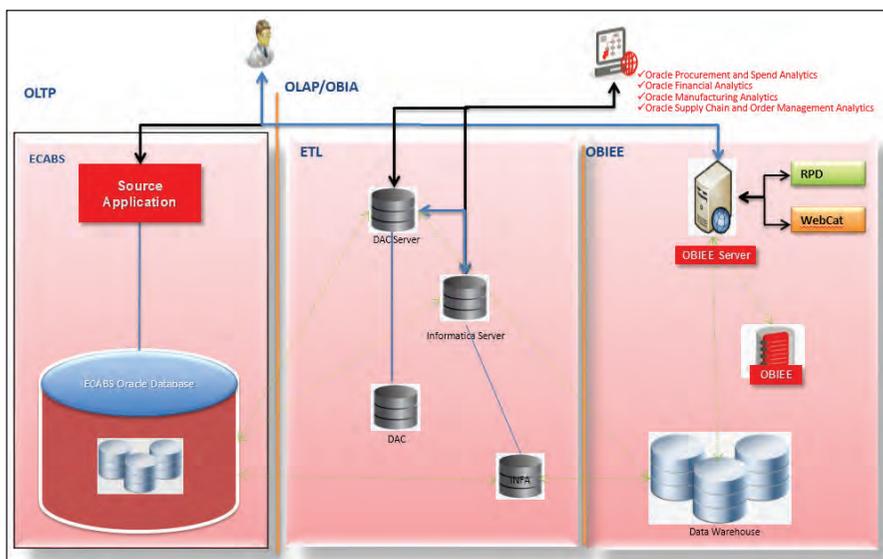


Figure 1: Architecture Implemented

### High-Level Project Plan

Our project plan shows the key milestones of our 90-day implementation of OBIA alongside Oracle EBS (See Figure 2 and 3).

Task Name	Duration	Start	Finish
OBIA Implementation	90 days	Mon 6/23/14	Fri 10/24/14
Development Instance	34 days	Mon 6/23/14	Thu 8/7/14
OBIA Installation	3 days	Mon 6/23/14	Wed 6/25/14
Configuration	18 days	Thu 6/26/14	Mon 7/21/14
Testing and Training	20 days	Fri 7/11/14	Thu 8/7/14
Test Instance	28 days	Fri 8/8/14	Tue 9/16/14
Migration from Dev to Test	5 days	Fri 8/8/14	Thu 8/14/14
Configuration	18 days	Fri 8/15/14	Tue 9/9/14
Test	5 days	Wed 9/10/14	Tue 9/16/14
Prod Instance	28 days	Wed 9/17/14	Fri 10/24/14
Migration from Dev to Prod	5 days	Wed 9/17/14	Tue 9/23/14
Configuration	18 days	Wed 9/24/14	Fri 10/17/14
Test	5 days	Mon 10/20/14	Fri 10/24/14

Figure 2: Project Plan

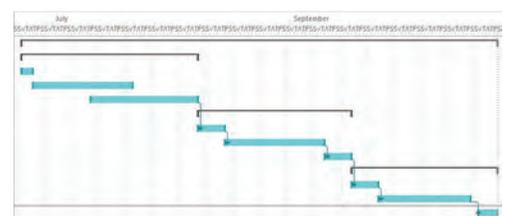


Figure 3: Project Gantt Chart

## Conclusion

With greater demand for transparency and accountability from stakeholders and regulators, there is a need for inter-and intra-company collaboration and improved and transparent management processes. Executives are being held accountable for business success and failures, and, therefore, the imperative exists to ensure operating information is correct and consistent. They must have confidence in their process and, ultimately, in the results that they are reporting.

Implementing OBIA during an ERP implementation or shortly after provides a centralized and flexible reporting structure for the entire organization. With less demand on the ERP system for reporting, the ERP system can now do the job it is intended for with ease. With a single version of truth for all reporting constituencies, an organization can now effectively utilize data to better communicate, improve processes and build strategies for a stronger organization.

## Quick Wins

Here are some examples of quick wins that Worthington Industries achieved by just looking at OBIA Graphs and Charts.

1. Helped define training needs.
2. Improved on-time shipping.

## Tips and Tricks

- Key and Descriptive Flex Fields: Add ETL change and pull the data.
- Excel Export Limit: 50000 cells by default. Bump it up, otherwise most exports will fail.
- Initial Extract Date: Whenever you will do a complete load, this date will be used from EBS
- Global Currency Code: OBIA provides the option to look at data in three global currency codes, a useful feature for multinational companies.
- Make or Buy Flag in EBS: OBIA and EBS need to match to get the data right. 1 for Make, 2 for Buy.
- Patching for EBS: You have to apply some mandatory patches in EBS to OBIA to work. Refer to My Oracle Support (MOS) for details.

With great support from executive leadership, well defined organizational change management standards and a highly enthusiastic and dedicated project team, we configured and deployed finance, purchasing and manufacturing within three months. Our business users were able to use reports and perform analytics from day one of our ERP go-Live. ♦

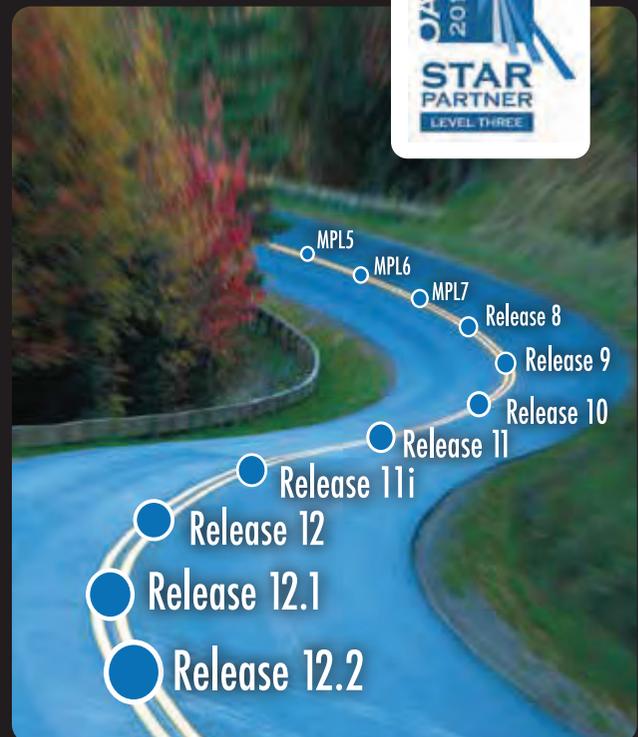
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*Tusar Das has more than 25 years of experience in the IT industry, primarily in Oracle EBS, SOA middleware and BI technology. He is currently working at The Worthington Industries as Director of IT – Business Solutions and is responsible for all Oracle footprints of the business units and corporate. You may contact Tusar Das at [tusar.das@worthingtonindustries.com](mailto:tusar.das@worthingtonindustries.com) or by phone at +1 614.840.4764.*



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# FINANCE CLOSE: GET YOUR TIME BACK

PANKAJ CHAUKADE, DELL INC.

*Most folks are well aware of the pain of closing the finance books each month and quarter.*

Dell is one of the largest Oracle Applications implementers in the world, and we use almost all flavors of the various modules to meet the business' desired goals. This article looks at Dell's month-end close processes and practices for meeting the business service level agreement (SLA) on month-end close posting jobs by leveraging monitoring tools, utilizing an in-house monitoring dashboard and completing proactive preventive tasks that support personnel can perform ahead of close activities.

In addition, it covers the adoption of Advanced Customer Support (ACS) into production support teams to continually improve its process using the flavors of Agile.

### Finance Month-End Close Posting Process

For any company, the financial close process is important as it is the function directly related to producing the company financial results for each period end. The posting process refers to the sequence of steps taken by the business to update Finance Data Mart (and sometimes FinCApp) with data from the Oracle E-Business Suite (EBS) finance application. (See Figure 1.)

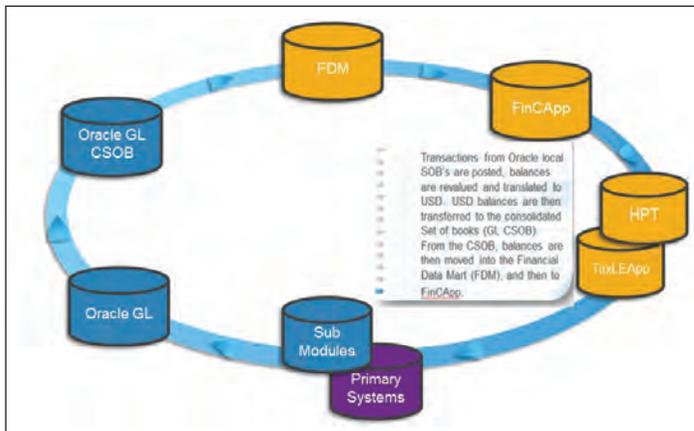


Figure 1:

### About Finance Close Postings

Expectations for the financial close process at Dell have been established collaboratively by the IT and business users and address key aspects of the service delivery, including:

- The financial close process is documented in Global Post Calendar with agreement by the Corporate Reporting team.
- The posting completion SLA is defined as 3hrs 30mins by the business.
- Posts are categorized into three types: Standard Posts, Exception Posts, and Corporate Managed Posts.

### Potential Delay to Close Process

A number of factors pose a threat to the posting completion process and our ability to complete the work as defined by the SLA:

- Unexpected entries late in the close cycle:
  - o Can drive changes to P&Ls, rework of reported figures.
- Degraded system performance:
  - o Performance can degrade due to technical system issues (network connectivity, memory or table space constraints, etc.), driving slower response times.
  - o Large reports can drain system resources.
  - o Reports written with poorly chosen parameters can cause system to “hang.”
- Longer post times:

- o Longer post times reduce the amount of time available for analysts to review data.

### How We Aim for a Successful Close

At Dell, we have implemented a number of activities that help us avoid or mitigate the threats to a successful financial close.

#### • Proactive Monitoring Activities

As the term implies, our proactive monitoring is conducted in anticipation of problems before they may actually occur. This puts us in a position to intervene quickly if and when a threat is detected to resolve any issues that pose a threat to a successful close. Below are the key areas we pay attention to in order to maintain application go-green:

- o Performance (health check) report.
- o Monitor concurrent managers.
- o Monitor long running jobs and send email to users.
- o Monitor critical failed jobs.
- o Monitor application performance.
- o Monitor overall system/database locks.
- o Concurrent manager workload.
- o Track inactive users FORM sessions.
- o Monitor active database sessions.
- o AQ depth monitoring.

#### • Leverage Tools

Oracle’s integrated solution for administering, managing and monitoring IT infrastructures and systems provides comprehensive, flexible and easy-to-use monitoring functionality to discover and manage Oracle databases and applications:

- o Oracle Enterprise Manager.
- o Application Management Pack/Suite.
- o Foglight.
- o OraChk.

#### • Dell Custom Monitoring Dashboard

The Oracle Center of Competency (CoC) dashboard is instrumental today as a monitoring tool for the support resources. The dashboard is very efficient as it is a one-stop-shop monitoring utility, allowing support to monitor all the Oracle ERP environments. (See Figure 2.)

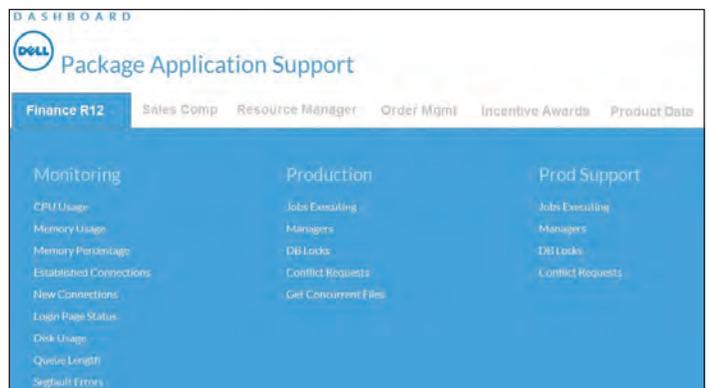


Figure 2:

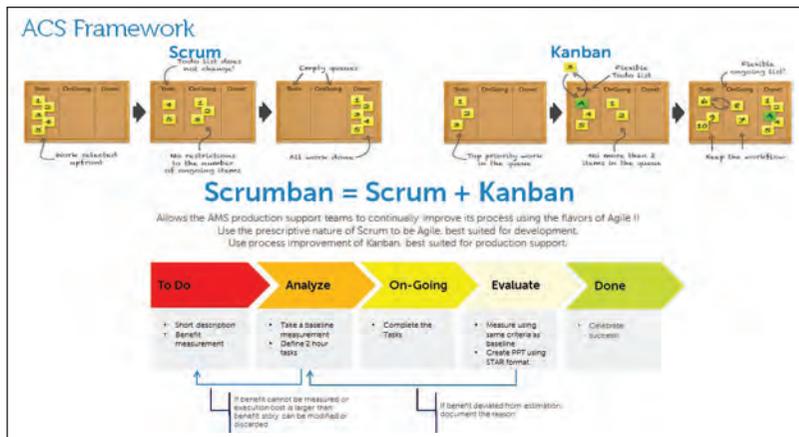


Figure 3:



Figure 4:

### Preventive Maintenance

We employ a proactive approach to ensure a smooth financials month-end close and improve operational efficiency and system reliability.

Schedule concurrent jobs for application and database to keep your system go-green:

- Gather schema stats. In 11gR2, keep estimate percent as null to use auto sampling.
- Purge concurrent request and/or manager data.  
**Note:** For finance system, auditor may require to keep concurrent requests for one-year data.
- Purge diagnostic and log messages.
- Purge sign-on audit data.
- Purge obsolete workflow runtime data.
- Purge obsolete generic file manager data.
- Table partitioning.
- Archiving solution through Informatica.
- Rebuild indexes and reorg tables.

These additional processes also contribute to the smooth month-end close:

- Strong business/IT partnership.
- Pre-close activities (soft close) using Oracle’s Period Close Advisor: (Doc ID335.1).
- Clear communications among all executive and management parties.
- Understanding of dependencies with external applications.
- Documented processes.
- Regression/performance testing.
- Strictly follow the finance moratorium.

### Advanced Customer Support

Last not but not least, Scrumban allows production support teams to continually improve processes using the flavors of Agile. Scrumban is an Agile project management methodology that is meant for an unpredictable work environment, where plans and requirements change often. It offers flexible project management for companies that are support focused (IT operations). (See Figure 3.)

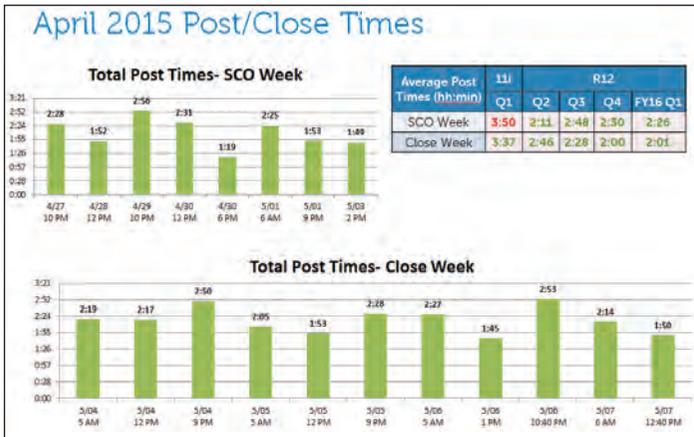


Figure 5:

Dell's support team works through Advanced Customer Support on Proactive and STAR stories to keep the application go-green, eliminate recursive issues and improve application efficiency. Results are captured through STAR (Situation, Tasks, Action, Results) stories. (See Figure 4.)

### Results

As a result of Dell's efforts to implement the processes and practices described here, IT is consistently meeting the business SLA on month-end close posting processes. (See Figure 5.)

### Conclusion

In today's world, meeting SLAs on business finance close activity for any organization is challenging considering the increasingly complex application functionality, data growth, concurrent user's activity and more. Even with limited resources and time, IT/support can deliver the best of everything and assist business to meet their desired goals along with SLA.

The proactive, preventive and ACS (Advanced Customer Support) activities with adoption of industry standard monitoring tools provides an integrated close solution to help support/IT organizations proactively manage business financial close within SLA. It improves the productivity, governance, transparency and predictability on finance close. ♦

*Pankaj Chaukade is the ACS Lead – Oracle EBS & Finance Applications at Dell Inc. He has more than 12 years of Oracle EBS experience, is a techno-functional expert/architect and has Apps DBA experience in implementing EBS 11i/R12, which includes more than 30 successful EBS deployments from the support side and the management of more than 130 applications within the finance space. Contact Pankaj at Pankaj\_chaukade@dell.com.*

# On a mission to replace Oracle Discoverer?



## Meet Wand, Reports Wand

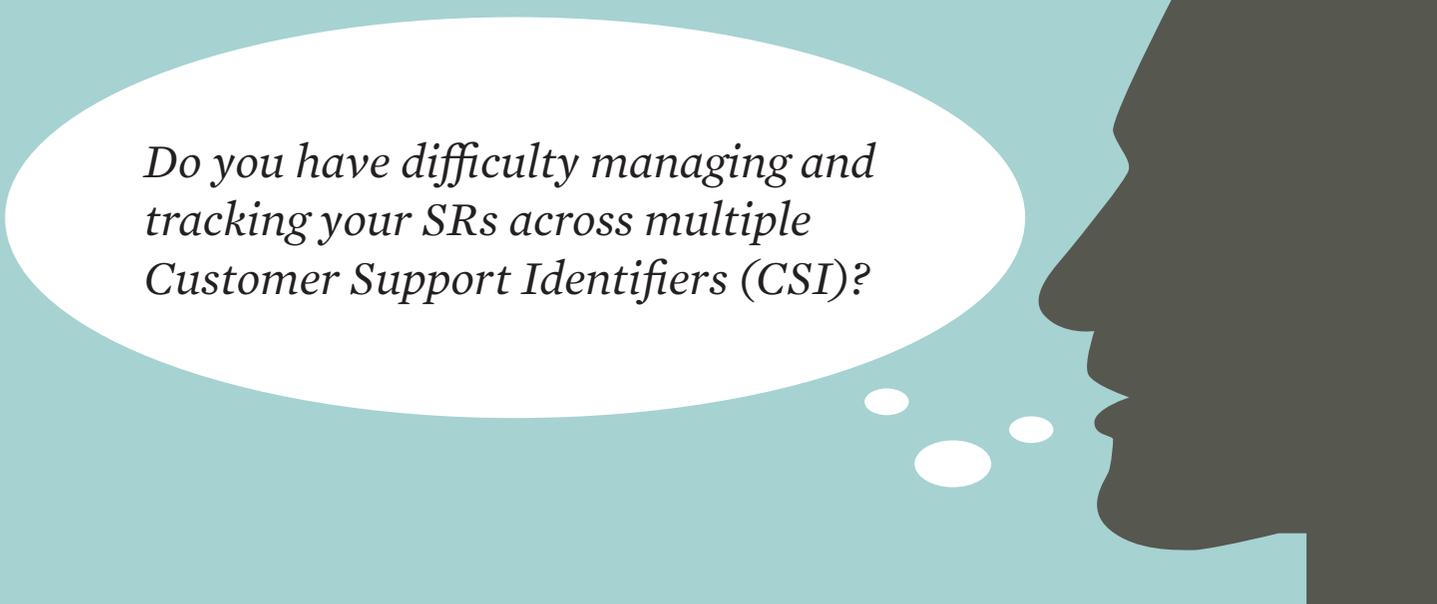
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*Do you have difficulty managing and tracking your SRs across multiple Customer Support Identifiers (CSI)?*

# ORACLE SUPPORT IDENTIFIER GROUPS

DOUG HAHN, INVESCO

Do you have difficulty managing and tracking your SRs across multiple Customer Support Identifiers (CSI)?

With Support Identifier Groups, Oracle Support has provided a new way to group hardware and/or software assets into logical or virtual Customer Support Identifiers. Support Identifier Groups allow customers to manage their interactions with Oracle Support in a new way.

A Customer User Administrator (CUA) can create Support Identifier Groups for their organization based on their needs, and Support Identifier Groups can be set up indefinitely or for a finite period of time. This flexibility allows a targeted group within an organization to take control of how their Service Requests (SR) are created and managed. They can even limit the visibility of SRs within an organization.



## *Support Identifier Groups to the rescue!*

There are many ways this can be done. Here is one example of how we used Support Identifier Groups last year as part of a test group:

Like many of you, CSIs were assigned to us when we purchased licenses from Oracle. This didn't always align with how the CSIs were being used. Our E-Business Suite (EBS) R12 upgrade project used several CSIs to log SRs. One CSI was for UPK, another for databases, a third for EBS. It was a nightmare trying to see the big picture and where we needed to focus resources.

Support Identifier Groups to the rescue! We created a Support Identifier Group for all our project needs and copied assets from various CSIs into our new Support Identifier Group. All SRs that were opened in support of the project were consolidated into one place. Our teams were not distracted by SRs unrelated to our project, and we remained focused on the SRs that were related.

Consolidated reporting, streamlined efficiencies and better control over our interactions with Oracle was a huge benefit and cost savings for us.

I encourage you to take a look at the Oracle documentation on Support Identifier Groups at <https://support.oracle.com/rs?type=doc&id=1569482.2>.

Support Identifier Group features are enabled for all CUAs for all organizations. ♦

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*Doug Hahn is the Head of Corporate Applications at Invesco and chairs the OAUG Customer Support Council.*

*This article first appeared in the February OAUG Support in Focus electronic newsletter, the official publication of the OAUG Customer Support Council. Serving as an advocate for OAUG members, the OAUG Customer Support Council meets regularly with Oracle Support to discuss customers' support-related challenges, concerns and ideas.*

*Learn more on page 38.*

# DIVESTITURE DANGER

BRIAN LEWIS, CPA, EPRENTISE

Driven by increasing incidents of data breaches, security protocols and data protection have become more robust in the last decade. In general, most entities have implemented strong safeguards to ensure that issues such as inadvertently sharing identifying information with third parties are avoided. Despite this effort, problems arise when companies have legacy or inactive ERP data.

Prior to enhancing security protocols, it was common practice to put sensitive data into unsecured areas, such as memo and descriptive fields; as a result, much legacy data does not meet privacy and security standards. This risk can be managed without the expense of a data purge by implementing access controls, but danger remains when a third party is given access to an existing instance - a common occurrence during a divestiture.

The risk cannot be understated. A single inadvertent unauthorized disclosure of private information could result in large penalties. If the clone instance is provided to a competitor, there may be added damage resulting from disclosure of the non-divested business' proprietary information – including vendor and customer credit lines, and customer and vendor contractual details – and the threat of litigation losses.

So what is an appropriate risk management strategy to adopt during a divestiture? An entity has three choices: minimize the risk, accept the risk, or ignore the risk.

**Minimizing the Risk:**

This strategy involves non-disclosure agreements with third-parties, contractual obligation, and other due diligence. The ideal way to minimize the risk is to purge legacy, non-divestiture related data from the clone instance provided to the divested or acquired entity.

**Accepting the Risk:**

Accepting the risk can be an effective risk mitigation strategy, but management must have a relatively accurate estimate of the data exposure accompanied by a “what-could-go-wrong” quantification of potential losses.

**Ignoring the Risk:**

Barring a means to quantify the risks associated with the divested clone

instance's legacy and unrelated data, entity management is not accepting the risk. Instead, by default, the worst approach has been chosen: ignoring the risk. This leaves the entity open to the possibility of being deemed negligent, which can significantly exacerbate litigation, among other threats.

During the rapid transition of a divestiture, it is critical to address the risk of legacy, inactive, and unrelated ERP data. The best strategy is to avoid the unacceptable act of ignoring the risk, and instead minimize or accept it. ♦

Brian Lewis, CPA, is Corporate Controller of eprentise. He brings accounting information system, GAAP, IFRS, and regulatory accounting expertise to the team, as well as managing operations for the company.

**ABOUT EPRENTISE:**

eprentise serves the Oracle® E-Business Suite (EBS) community with transformation software that improves business agility, supports changing requirements and eliminates the need for a reimplementations. With eprentise software, companies can receive access to complete, consistent and correct data. [www.eprentise.com](http://www.eprentise.com)

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## UPDATE ON GEOGRAPHIC USER GROUPS (GEOS)

### What is a Geographic User Group (Geo)?

Geographic user groups (Geos) are independent OAUG affiliated user groups that bring together a variety of Oracle Applications users within a defined geographic region. Geos create opportunities for participants to discuss a variety of applications and share ideas. Currently, the OAUG has Geo affiliates in the continental United States, Canada, AsiaPac, Latin America and EMEA.

There are many benefits of participation in a user's local Geo. These benefits include:

- Opportunities to learn tips and tricks for installation, integration, utilization and maintenance of Oracle Applications.
- Knowledge of best practices from colleagues utilizing Oracle Applications.
- Local meetings and training sessions featuring Oracle experts.
- Direct access to local Oracle management and much more.

A complete list of Geo groups, upcoming meetings, website addresses and contact information is available at [oaug.org](http://oaug.org) under the User Communities tab.

## 2015 Geographic User Groups

- Atlanta OAUG
- AUSOUG (Australia)
- Central States OAUG
- Colorado OAUG
- DC-OAUG
- Eastern States OAUG\*
- Florida OAUG
- German Oracle Users Group (DOAG)
- Heartland OUG
- India OAUG
- Japan-OAUG
- Latin OAUG
- Michigan OAUG
- Mid-Atlantic OAUG
- Nevada OAUG\*
- New England OAUG\*
- New Jersey OAUG
- North Central OAUG\*
- Northern California OAUG\*
- Northern Ohio OAUG\*
- Northwest OUG
- NYC Metro OAUG (New York City)
- Ohio Valley OAUG\*
- Pittsburgh OAUG
- San Diego OAUG
- Southern Ontario OAUG
- Southwest Regional OAUG\*
- Texas/Louisiana OAUG
- Twin Cities Financials OAUG
- Twin Cities Manufacturing OAUG

\*Special Acknowledgement – 2015 OAUG Geo/SIG Certificate of Distinction Award Recipient.

## UPDATE ON SPECIAL INTEREST GROUPS (SIGS)

### What is a Special Interest Group (SIG)?

Special Interest Groups (SIGs) are user groups that bring together participants that share a common interest with specific Oracle Applications products. SIGs may also represent a specific industry, such as the public sector or manufacturing. Additional SIGs are affiliated in response to the development and expansion of the family of Oracle Applications. SIGs are open for worldwide membership and operate online communities, with many hosting meetings at the annual COLLABORATE or Oracle OpenWorld conferences.

A complete list of SIGs, upcoming meetings, website addresses and contact information is available at [oaug.org](http://oaug.org) under the User Communities tab.

## 2015 Special Interest Groups

- ADI SIG
- AP SIG\*
- AR, Credit & Collections SIG\*
- Archive & Purge SIG
- Assets SIG\*
- BI Publisher SIG
- Channel Revenue SIG
- Cloud ERP SIG
- Communications Billing and Revenue Management (BRM) SIG
- Communications MetaSolv Solution SIG
- Configurator SIG\*
- Consumer Goods SIG
- Contracts SIG
- Cost Management SIG\*
- CRM On Demand SIG
- Customer Experience Community (CXC)
- Customization and Alternatives SIG
- Database SIG\*
- Discrete Manufacturing SIG

- E-Business Applications Technology SIG\*
- E-Business Suite SIG
- E-Business Suite User Management SIG\*
- EDI (e-Commerce Gateway) SIG
- Endeca SIG
- Energy & Utilities SIG
- Enterprise Asset Management (EAM) SIG\*
- Enterprise Manager for Applications SIG
- Financial Services Industry SIG
- Fusion Middleware SIG
- General Ledger (GL) SIG\*
- Governance, Risk & Compliance SIG
- Government Contractor SIG
- Hyperion SIG
- Incentive Compensation SIG
- K-12 Education SIG
- Logistics SIG
- Master Data Management SIG
- Migration and Integration SIG

- Multi-National SIG\*
- Oracle Business Intelligence – Big Data SIG (OBI-BD SIG)
- Oracle Primavera SIG (OPSIG)
- Oracle Tax Management SIG
- Order Management & Advanced Pricing (QP) SIG
- OTM SIG
- Process Manufacturing SIG
- Procurement SIG
- Projects SIG
- Public Sector SIG\* – now includes Federal SIG
- Quality SIG
- Siebel SIG
- SysAdmin SIG
- UPK SIG
- Upgrade SIG
- Value Chain Planning SIG –now includes Demantra SIG
- Workflow SIG

\* Special Acknowledgement 2015 OAUG Geo/SIG Certificate of Distinction Award recipient.

## A LEARNING OPPORTUNITY

OAUG associate members have the opportunity to host educational sessions, which are held several times each month.

These interactive webcasts provide information about a variety of products and services that complement Oracle Applications. Visit [oaug.org](http://oaug.org) and click on the “Partners” tab for details.



If you are an Associate member of the OAUG and would like to host a Vendor Awareness session, visit [oaug.org](http://oaug.org) and click on the “Partners” tab, or send an e-mail to [mnessing@oaug.org](mailto:mnessing@oaug.org), or call +1 404.760.8179.

## OAUG VENDOR AWARENESS SESSIONS



**RESERVE YOUR SESSION TODAY!**

## Mobile Apps for EBS SIG

The Oracle Applications User Group's (OAUG) newest special interest group (SIG), the Mobile Apps for EBS SIG, was recently formed to provide information about the various Oracle E-Business Suite (EBS) Mobile Applications released by Oracle.

The Mobile Apps for EBS SIG will present education and knowledge sharing through webinars, meetings and presentations. The presenters will be from actual end-user companies as well as members from Oracle's Development team. To date, Oracle has released 14 mobile applications that work on both iOS and Android platforms. The Mobile Apps for EBS SIG represents all mobile apps for the various EBS modules.

As with all OAUG SIGs, the new Mobile Apps for EBS SIG will provide feedback from the user community to the Oracle Development team as a direct channel to recommend enhancements and influence future developments. The membership of this SIG is open to anyone with an interest in Oracle EBS Mobile Apps and their use. For more information, **visit [mobileapps.oaug.org](http://mobileapps.oaug.org)**.

## CONNECT WITH THE OAUG AT ORACLE OPENWORLD 2015



OAUG Geographic (Geo) and Special Interest Groups (SIGs) are well known as the place for members to share best practices, time-saving tips and real-world, hands-on experiences with their peers. The member-developed content available through OAUG Geos and SIGs helps members find answers, solve problems and save time and money.

Each year during Oracle OpenWorld, OAUG Geos and SIGs present more than 50 sessions on Sunday. The user-led SIG sessions feature users and expert consultants sharing their first-hand knowledge and problem-solving tips and suggestions on a range of topics including EBS, Hyperion EPM, OBIEE, BI and more. In addition, many Geos host Sunday sessions that offer attendees the opportunity to meet peers from their local community.

The Sunday Geo and SIG sessions at OpenWorld are open to everyone with a full conference pass. Visit [oaug.org/openworld](http://oaug.org/openworld) for a list of sessions and times.

While you're at Oracle OpenWorld 2015, be sure to visit the OAUG membership booth in the lobby of Moscone South to find out how OAUG membership helps you find answers, network with real users and expert consultants, and influence Oracle.

And discover why 96% of OAUG members recommend membership. Have your badge scanned for your chance to win Amazon gift cards or free registration for COLLABORATE 16 in Las Vegas, Nevada, USA. ♦

**Visit the OAUG in the Users Group Pavilion in Moscone South during Oracle OpenWorld 2015. [oaug.org/openworld](http://oaug.org/openworld)**



# OAUG MEMBER SNAPSHOT

## ALEX TOMOVICI



At the OAUG, we value quality over quantity. For only being a member of the OAUG since March 2012, Alex Tomovici certainly stands out in his few but highly productive years with the

organization, which is why we devote the Member Snapshot column in this issue of *OAUG Insight* to him.

A senior programmer/analyst at Placon Corporation, Alex joined the OAUG when Placon was considering an upgrade from Oracle E-Business Suite (EBS) 11i to Oracle EBS 12.1.3. Up until that point, Placon managed all their systems internally, but with a project as daunting as migrating to Oracle 12.1.3, the company knew it needed the help of outside Oracle experts who had made that transition to learn from their experience, uncover best practices and avoid common mistakes. By taking advantage of the networking opportunities at COLLABORATE 12, Placon was able to meet and employ a team of consultants and consulting companies to assist with the 12.1.3 integration.

“Not only was the OAUG instrumental in helping my company with a successful upgrade, it has been instrumental in my professional development by offering many resources available at my fingertips and exposing me to many industry experts and vendors that I would have never known about otherwise,” said Alex. “I have not missed a COLLABORATE conference since I joined the OAUG because I gain so much from the great networking opportunities and the relevant presentations that help me

develop in my career.”

It was at COLLABORATE 12 that Alex met a member of the OAUG Customer Support Council who inspired him to join the committee. Thankfully for the OAUG, Alex has been an active member of the OAUG Customer Support Council ever since, participating in all the meetings, volunteering at the council’s booth at every COLLABORATE and sharing ideas and initiatives to help shape future resources and policies from Oracle Support. Currently Alex is working with the council on a member survey from COLLABORATE 15 to assess their needs and relay their ideas and opinions to Oracle.

“The OAUG Customer Support Council is a wonderful forum that enables average Oracle users to provide feedback directly to Oracle, and it is exciting to see how Oracle products have evolved as a result of Oracle listening to that user feedback. It is very beneficial to be a part of something so influential.”

Not only is Alex a dedicated OAUG member and OAUG Customer Support Council member, he is a member of the Project Management Institute and holds a Project Management Professional (PMP) certification.

Alex is also a dedicated family man, happily married to his wife of 31 years and a proud father to his son who just graduated from Iowa State. The family resides in Madison, Wisconsin, where they have lived for the past 17 years. ♦



# MEMBER BENEFIT SHOWCASE

NANCY GAINES, M-I SWACO

## Your Voice to Oracle: The OAUG Customer Support Council

Joining the OAUG Customer Support Council when it first formed 18 years ago at the OAUG conference in Florida was a very beneficial move. My organization was new to Oracle, having gone live in March 1997 with Financials and Oracle Process Manufacturing.

Our first OAUG conference provided the information that the version of Oracle we were on was not Y2K compliant. This information established what our next project would be concerning Oracle: to upgrade to FIN 10.7/ OPM 4.10.06 newer versions. I chose the OAUG session on the Customer Support Council to learn as much as I could about Oracle in order to provide support to our own Oracle users, not realizing that this would become one of the most rewarding sessions to attend.

The council began as a way to open the communication between OAUG members and Oracle Support. All these years later, having direct access to Oracle is incredibly valuable.

Being able to have a conversation and bring issues to Oracle's notice was important. This was very relevant whenever de-support timing came up. The first was 10.7 version. Then, the missing ETRM manuals for new versions released, providing feedback on Oracle TAR Survey questions as well as good and bad feedback on support issues. And finally the de-support of 11i when the Customer Support Council was able to provide users' business information to Oracle about the de-support, which ultimately prompted the Extended Support fee waivers.

The council also provides a forum that allows Oracle Support the ability to solicit user opinions on relevant issues and new procedures, such as the new version of Metalink and ultimately My Oracle Support. ♦

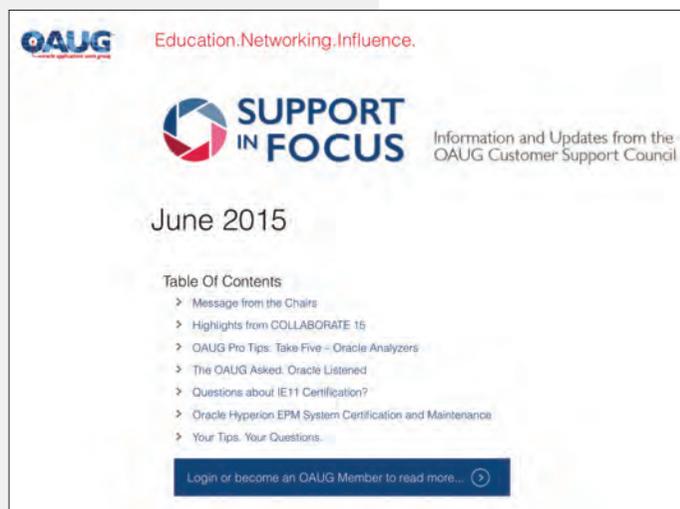
*Nancy M Gaines is a senior IT applications architect at M-I SWACO, a division of Schlumberger.*

OAUG members have a unified voice for communicating collective priorities for the future development, direction and enhancement of Oracle Applications. The OAUG Customer Support Council works at the grassroots level to gather information from members to identify needs or areas of concern. The council then works with Oracle Support to evaluate and address priority topics. Submit your Oracle Support-related questions or requests to the council at [support@oaug.com](mailto:support@oaug.com).

The OAUG Customer Support Council reports back to the membership via the Support in Focus newsletter, which contains updates on topics related to product enhancements, service requests (SRs), documentation, patching, system maintenance, certifications, proactive tools, Oracle Support policies and more.

OAUG *Support in Focus* is published quarterly, exclusively for OAUG members. Visit [oaug.org/supportinfocus](http://oaug.org/supportinfocus) for the latest issue.

**Learn more about the OAUG Customer Support Council at [oaug.org/resources/csc](http://oaug.org/resources/csc).**



**If you're not an OAUG member yet, join online at [oaug.org/membership](http://oaug.org/membership), or call 404.240.0897 today so you and your colleagues can connect with the OAUG Customer Support Council.**

# NEW AND RETURNING MEMBERS

The OAUG welcomes the following new and returning members who joined April 1, 2015 – June 30, 2015.

## Returning Associate Members:

Accenture  
AdvancedEPM Consulting, Inc.  
Application Software Technology (AST) Corporation  
Atherio Inc.  
Centric Consulting  
Hyland Software, Inc.  
Sierra-Cedar  
TurnKey Solutions Corp.

## Returning Individual

### Associate Members:

Dennis Nelson  
ebSolutions Inc  
ICE Associates, LLC  
JoMax Consulting LLC  
Richard Byrom Consulting

### Returning User Members:

AAI Corporation  
Accellent, Inc.  
Actewagl Distribution  
Alexander Proudfoot  
Ameren Corporation  
AmeriCredit Corp.  
ANZA, Inc. (Holien, Inc.)  
Apollo Group, Inc.  
Bahwan CyberTek Inc (BCT)  
BCS Financial Corp  
Bimba Manufacturing Company  
Boars Head Provisions Co. Inc.  
Boral Ltd.  
Carlson, Inc.  
Carnival Corporation & PLC  
Ceridian  
Chase Brass and Copper Co. LLC  
Chicago Public Schools  
Citizens Energy Group  
City of Coquitlam  
City of Lakeland  
City of Omaha/Douglas County  
City of Virginia Beach  
City of West Water  
Cochlear Limited - Australia  
Colonial Pipeline Company  
Compass Group (Australia) Pty. Ltd.  
Correctional Service Canada  
Crane Aerospace and Electronics  
Creation Technologies Inc.  
Credit Acceptance Corporation  
Creighton University  
Curtin University of Technology  
CXtec  
Cymer, Inc.  
DeltaWare Systems  
Denso International America  
Department of Commerce  
Development Alternatives, Inc. (DAI)  
Development Dimensions Int'l. (DDI)  
Eaton Corporation  
Edw. C. Levy Co.  
Embry Riddle Aeronautical University  
Fair Isaac Company

Family Dollar Stores  
First Data Corporation  
Flinders University  
Flint Hills Resources  
Foresee Consulting  
Fruit of the Loom  
G6 Hospitality LLC  
Gallup (Technology)  
Gander Mountain  
Gates Corporation  
General Electric (GE)  
Genpak LLC  
Glatfelter Insurance Group  
Graco Inc.  
Granite Services, Inc.  
Group Publishing, Inc.  
Hansen Corporation  
Harlequin Enterprises Limited  
Herff Jones, Inc.  
Home Retail Group  
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IBM Japan Services Company Ltd.  
iiNet Limited  
Indiana Mills and Manufacturing (IMMI)  
Interactive Data Corp.  
Invesco  
JEA  
Johnson County Kansas  
Kinetic IT  
Landcorp  
Landgate  
Las Vegas Valley Water District  
Laser Spine Institute LLC  
Lawrence Livermore National Laboratory  
Mark Gurry & Associates  
Marquette University  
Massy Technologies InfoCom (Trinidad) Ltd.  
McCarthy Building Companies, Inc.  
McGrath RentCorp  
Mediacom Communications Corporation  
Mercury Marine  
Metropolitan Washington Airports Authority  
Minnkota Power Cooperative, Inc.  
MKS Instruments, Inc.  
Mood Media  
Motorola, Inc.  
National Renewable Energy Laboratory (NREL)  
Neenah Paper Inc.  
NISource Inc.  
NSF International  
NYC School Construction Authority  
OPEX Corporation  
O'Reilly Media, Inc.  
Organization for Security and Co-Operation (OSCE)  
Orthofix, Inc.  
Panama Canal Authority  
Paradigm  
Parkway Corporation  
Plains All American Pipeline, L.P. (PAAP)  
Port of Oakland  
ProQuest LLC  
PTI Technologies, Inc.  
Quest Diagnostics

RACWA  
Realogy Corp.  
Regeneron Pharmaceuticals, Inc.  
Regina Public Schools  
RGIS  
Rheem Manufacturing  
San Diego State University  
Santos Ltd.  
Select Comfort Corporation  
Select Medical Corporation  
Stanford University  
State Compensation Insurance Fund  
State Corporation Commission  
Sunflower Electric Power Corporation  
Swift Energy  
Teradyne, Inc.  
Terracon  
The Washington Post  
The Zenith Insurance Company  
TMEIC Corporation  
Toshiba (Australia) P/L  
Toyota Boshoku America (TBA)  
Trinity Logistics  
Union Electric Steel Corporation  
University of Bergen/Uni Research  
University of Northern Iowa  
University of Oslo  
University of Pittsburgh  
Valspar  
Vectren Corporation  
Victoria Police  
Virginia Mason Medical Center  
Wesco Distribution, Inc.  
West Virginia University  
Western Power  
Westpac Banking Corporation  
Wonderful Orchards  
Worthington Industries

## New Associate Members:

Hexaware Technologies, Inc.  
KEMP Technologies  
RexiAlo, Inc.  
Sakura Information Systems - Japan  
Spinnaker Support  
Vertical Edge Consulting Group

## New Individual Associate Members:

Alignment IT  
Kalwa, Inc.  
Rajasekhar Ravichandran  
RhinoSource, Inc.

## New User Members:

Aerojet Rocketdyne  
Americhem, Inc.  
Ausenco  
Belkin International, Inc.  
Carlton Forge Works, Inc.  
Caterpillar, Inc.  
Central Bank of Trinidad and Tobago  
City of Durham  
Daiichi Computer Resources Co., Ltd. - Japan  
Daiwa Securities Group Inc. - Japan



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- Ergotron, Inc.
- Ethos Energy Group
- Fidelity & Guaranty Life
- Fujita - Japan
- Gafcon, Inc.
- Gogo LLC
- Gordmans, Inc.
- Government of the Northwest Territories
- HD Supply, Inc.
- Hibino Corporation – Japan
- Howa Sangyo Co., Ltd. - Japan
- Integra LifeSciences Corporation
- Intrado, Inc.
- Ixia
- Kobayashi Pharmaceutical Co., Ltd. – Japan
- Kobelco Systems Corporation - Japan
- Loews Corporation
- Masco Corporation
- MegaChips Corporation - Japan
- Metropolitan Atlanta Rapid Transit Authority (MARTA)
- MISO
- Mitsubishi Fuso Truck and Bus Corp - Japan
- Mitsui Oil Exploration Co., Ltd. - Japan
- Navajo Nation
- Navitas Limited
- New York Independent System Operator
- Overstock.com
- Penta-Ocean Construction Co., Ltd. - Japan
- Plexus
- Purdue University
- QSC Audio Products, LLC
- Robert Half - Protiviti
- Roll International
- Santee Cooper
- Seaman Corporation
- Sony DADC
- Stryker Japan K.K.
- Time Creators Ltd. - Japan
- Tupperware
- Uchida Yoko Co., Ltd. - Japan
- UD Trucks Corporation - Japan
- University of Chicago
- University of Nevada Las Vegas (UNLV)
- Williams Companies
- Yahoo Japan Corporation

**New Individual User Members:**

- Chidiac Chidiac
- David Briggs
- Dhar Valluripalli
- Ethos Administrator
- Jose Murillo
- Joshua Willwerth
- Kimberly Watts
- Lars Petterson
- Mika Rintanen
- Neeraj Desai
- Praveen Mothkuri
- Rama Kalidindi
- Sakib Kadak
- Satya Mahanti
- Shankarah Lessey
- Suneel Sadhwani
- Talukdar Asgar
- Venu Potluri

# TNEMEC IMPLEMENTS REPORTS WAND AS COST-EFFECTIVE ALTERNATIVE TO ORACLE DISCOVERER AND BI SUITE

**CHRIS MEYER, PRESIDENT – AMERICAS & EUROPE, EXCEL4APPS**

Tnemec, a Missouri-based manufacturer of architectural and industrial coatings, faced a steep learning curve as it transitioned to Oracle, particularly when creating reports using standard Oracle tools. Complicating this situation was Oracle's decision to phase out its Discoverer reporting product and roll that functionality into its more costly and complex Business Intelligence (BI) Suite.

In addition to avoiding the expense and training for a BI system implementation, Tnemec also wanted to avoid exports of static data to Microsoft Excel for reporting as had also been required in Discoverer. Tnemec turned to Reports Wand from Excel4apps, an intuitive, cost-effective Excel-based reporting alternative to Oracle Discoverer and the BI Suite that accesses live data throughout the Oracle E-Business Suite. It found Reports Wand builds reports from a range of modules via an Excel interface, while allowing the company to capitalize on existing user expertise with Excel. Reports Wand now functions as the company's primary BI tool.

## Shifting Smoothly to Reports Wand

In preparation for the shift to Oracle order-to-cash modules, Tnemec worked in a Reports Wand test environment in late 2012 to create the necessary queries before the January 2013 go-live date. Ken Lloyd, Operations Controller for Tnemec, worked with various departments to establish how their reports should appear and then determined the Oracle tables to access. Next, either Michael Alkire, Tnemec's Applications Operations Manager, would create an SQL statement for the Reports Wand workbook to use in pulling in specified data, or Lloyd would create the SQL using Toad for Data Analysts.

Alkire says the process for creating these highly tailored reports in Reports Wand was simple, with perhaps the biggest challenge coming from the end users, who often changed requirements after seeing what Reports Wand could put at their fingertips.

## Supporting Oracle Expansion with Reports Wand

With the addition of the Oracle modules for order-to-cash processes in 2013, about 70 percent of Tnemec now runs on the ERP system. Only manufacturing and part of purchasing remain on the legacy AS400.

Outside of the corporate office, Tnemec primarily uses Reports Wand to manage shipping and inventory operations at its domestic distribution centers through an Excel workbook. This workbook contains live ERP system data regarding what workers are picking

for the day, what has to ship, and what is on hold. It has been a big hit, as it "provides real-time Oracle data that shipping clerks can refresh whenever needed," said Lloyd.

In addition to Reports Wand's shipping and inventory application, Tnemec's Sales and Marketing departments use the tool for sales reporting. Other queries converted to Reports Wand are reports for Accounts Payable Distributions, Perpetual Inventory, Expired Inventory, Cycle Count, Material Transactions, Physical Inventory Tags, Variance Reports, General Ledger Account Balances, General Ledger Journal Lines and General Ledger Chart of Accounts.

## A Viable BI Alternative

The real-time data from Reports Wand is always up to date immediately after adjustments are posted. This convenience leaves more time for analysis—instead of unnecessary busy work like cutting and pasting—leading up to the reporting deadline.

"It's an intelligence tool because it is helping us do what we want to do the way our company wants to do it," said Alkire. "We are leveraging the existing knowledge and skills of our staff."

Now that Tnemec is phasing out internal support for Discoverer, it is converting all Discoverer queries to Reports Wand or GL Wand, another Excel4apps' tool used to access Oracle Financials. In the future, Reports Wand will be used for reporting when manufacturing implements the Inventory module, meaning all Tnemec business processes are running via Oracle. ♦

*Excel4apps is a provider of Excel-based reporting, inquiry and budget uploading solutions for Oracle. Contact Chris at [chris.meyer@excel4apps.com](mailto:chris.meyer@excel4apps.com) or visit [www.excel4apps.com/oracle](http://www.excel4apps.com/oracle) to access a free trial of the Reports Wand and GL Wand solutions today.*

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## IS YOUR COMPANY READY FOR PAAS?

VENKAT DANDIBHOTLA

### Six steps to creating an agile organization that aligns people, processes and platform to deliver maximum ROI.

Platform as a service is key to binding departments together. It can facilitate collaboration internally and with external partners, ease real-time data exchange across the company, hasten product and application development, and give departments the benefits of integrated systems.

PaaS capabilities can be hampered, however, by a non-agile organization. Executives must act fast to anticipate or react to market conditions and ever-demanding customer expectations. Companies will not be able to fully capitalize on PaaS capabilities if their decision-making is siloed or they continue to be organized around long product development and release cycles.

Here are six steps to creating an agile organization that aligns people, processes, and platform to deliver the maximum return on your PaaS investment.

#### 1) Bust silos:

IT decision-makers must align horizontally across the company to understand the needs of their internal customers and non-IT stakeholders. Departmental system needs are often different. For example, you may have to consider specialized imaging, document management, or even payment systems as you make decisions about PaaS.

Make sure everyone's needs are understood. Review data-sharing needs across departments, identify collaboration technologies needed for team-based activities, and consider the challenges involved in integrating existing systems.

#### 2) Create an agile task force:

New initiatives often get stuck in the "clay layer" of organizations. Endless discussions, debates, and meetings happen without any meaningful output. Company leadership must break this cycle by creating cross-functional, agile teams with executive sponsors. These teams must weed out decision-making bottlenecks. They must also assess if current

platforms or systems can help support future business goals and objectives. For example, if an organization has mergers and acquisitions as a growth driver, the cross-functional teams must evaluate current platforms for scalability, supportability, and the ease with which the new acquisitions can be assimilated.

#### 3) Leverage your current assets:

One of the main concerns that I hear from customers is that they already have a lot of on-premises and cloud applications in place. While they want to invest in new technologies and applications, they should also be able to keep using their previous systems. As developers use PaaS to rapidly develop new applications, that platform must also integrate with existing systems and allow them to easily incorporate data from those systems in real time. For example, building a new application may require pulling customer data from one application and sales information from another. The PaaS platform should be able to help bring this data into the new application and deploy quickly.

#### 4) Contain shadow IT sprawl:

Shadow IT—systems and software built or adopted without official permission—exists in almost every company. Companies can expect that sprawl to increase given the ease of buying cloud offerings. Security, privacy, and supportability are an afterthought.

Shadow IT can also create siloed decision-making and propagation of platforms that do not align with the organization's goals and strategies. In order to contain or limit the sprawl, get vigilant about stopping departmental cloud purchasing. Avoid the temptation to buy a marketing-only or a financial-only solution. Broaden the perspective so the solution can bind departments and facilitate data sharing and smarter decision-making.

#### 5) Assess application development maturity and culture:

As companies adapt to rapid changes, the efficiency of the application development lifecycle—the time from the gathering of requirements to feature or service deployment—

becomes critical. Assess your current development process to identify ways for business and other departments—such as testing, deployment, and support teams—to work together to speed up the overall output.

**6) Get an outside perspective:**

Engage an industry strategy group to conduct an objective analysis of your organization’s agility and capabilities. This group can assess your capabilities, architecture, and development infrastructure; identify key technology enablers that tie to business goals; and help quantify the economic benefits. You can then take this type of business-case-ready analysis to your company’s decision-makers.

Company executives who keep these six strategies in mind as they plan their PaaS implementations will achieve an overall lower total cost of operation, extend the capabilities of current applications, and most importantly, change the culture of the organization to be agile and develop applications much more efficiently. ♦

*From Oracle’s Profit magazine, reprinted with permission.*

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