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THE OFFICIAL PUBLICATION OF THE ORACLE APPLICATIONS USERS GROUP

WINTER 2012

Neenah Paper Drives Customer Service and Operational Efficiency with Demantra and ASCP

Best Practices for Oracle User Productivity Kit

Moving to New ERP Environments: 2012 OAUG Survey on ERP Upgrade Economics

EBS R12.1.3 Upgrade Success Story at Louisville Water Company

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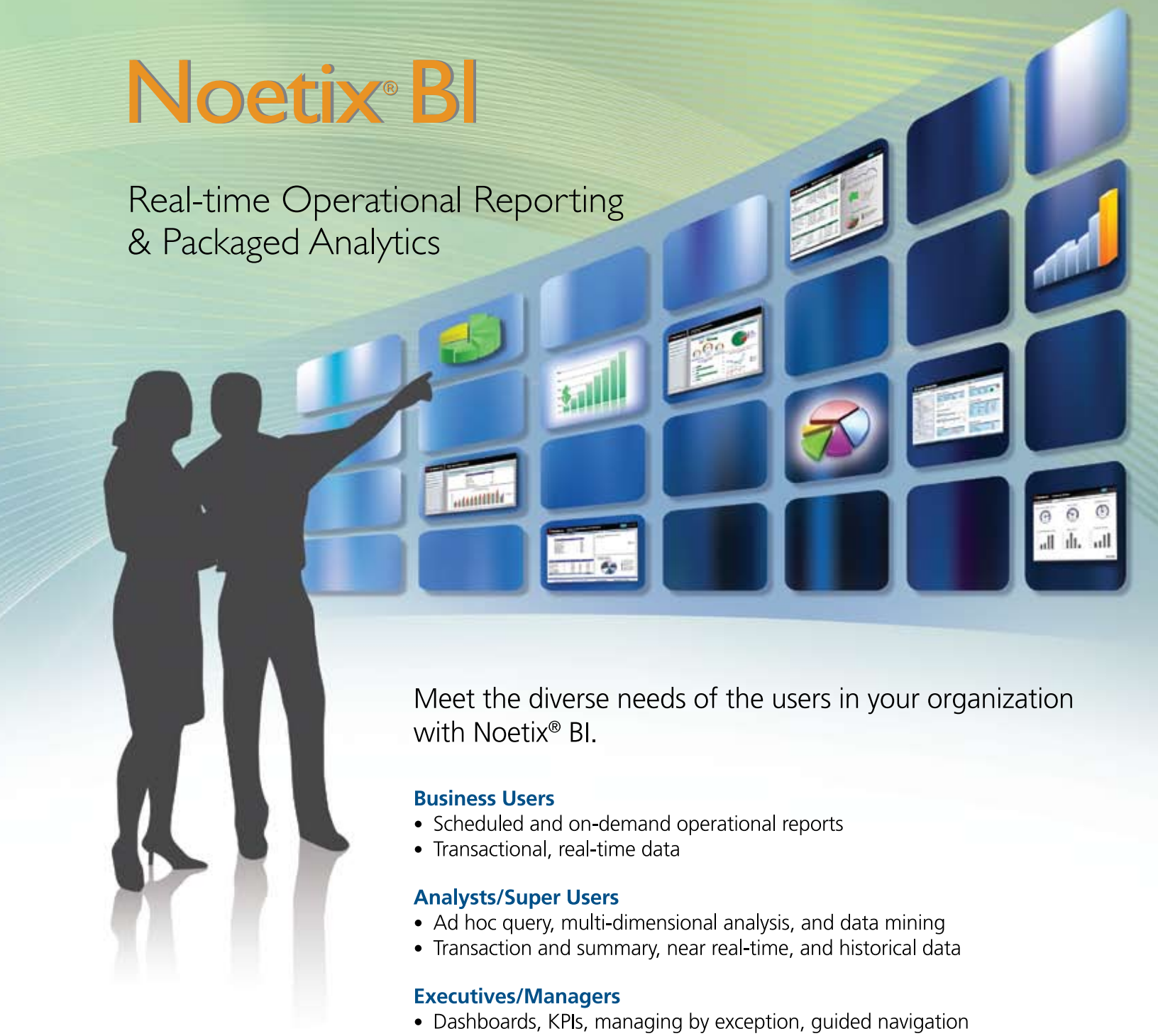

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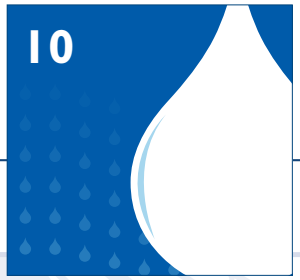

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OAUG insight

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It's not just our tagline: Education. Networking. Influence. It's also the goal that underpins the OAUG's Board of Directors' commitment to sustain and grow the programs, resources and events that our community of Oracle Applications users values.

Over the past year, in concert with the contributions of many talented and generous volunteer leaders, the OAUG has strengthened and expanded many membership benefits.

In 2012, more than 1600 members took advantage of discounted OAUG members-only registration rates – saving more than $600,000.00 – to attend conferences in Las Vegas, Austin, San Diego and Orlando. From the comprehensive COLLABORATE annual event to the smaller, more topic-focused OAUG Connection Point® Seminars, attendees find numerous opportunities to access and exchange information, build knowledge and capabilities, and network with peers and industry experts. Be sure to mark your calendars and plan to attend one or more of these conferences in 2013:

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- COLLABORATE 13 in Denver, Colorado, April 7-11, 2013.
- OAUG Connection Point® Seminars 2013: Planning is already underway for educational events covering these exciting topics: Primavera, Oracle E-Business Suite R12/Fusion Coexistence, Enterprise Performance Management /Business Intelligence and more.

In addition to face-to-face educational events, OAUG eLearning offers convenient live and recorded Webinar training. In 2012, more than 100 expert presenters facilitated more than 150 hours of training. OAUG members can access recordings of these sessions via the Education & Events tab on *oaug.org*. Watch for even more OAUG eLearning in 2013, beginning with a special Oracle E-Business Suite (EBS) deep dive series presented by Oracle representatives early next year.

We launched the OAUG Ambassador Program early in 2012 to help member organizations maximize the return on their OAUG membership investment by ensuring that every employee who can benefit from OAUG programs is aware of and making full use of the OAUG offerings. As this issue of *OAUG Insight* magazine goes to print, there are more than 700 OAUG Ambassadors actively participating in the program.

The OAUG's engagement and dialogue with Oracle continues to flourish. Oracle representatives have become more and more involved in delivering educational content through OAUG eLearning and face-to-face events. In addition, during OAUG conferences, "Meet the Experts" sessions give attendees the opportunity to have one-on-one meetings with Oracle executives. Many candid and discerning conversations have taken place over the past year or so, and "Meet the Experts" sessions have become an event favorite for both Oracle employees and event attendees.

Oracle's interaction with the OAUG's Geographic (Geo) and Special Interest Groups (SIGs) provides unique opportunities for OAUG members to explore product roadmaps, voice concerns and devise solutions with the Oracle representatives who have specific knowledge of products.

One of the OAUG's most influential advocacy groups is the OAUG Customer Support Council. The council serves to help OAUG members understand Oracle Support services and to represent members' challenges and interests to Oracle. Over the past several months, the council has worked with Oracle Support to help members plan and execute their EBS upgrades to Release 12.1.3 while maintaining support levels for their existing production environments.

During Oracle OpenWorld 2012, Oracle Senior Vice President, Applications Development, Cliff Godwin announced Oracle Support exceptions for E-Business Suite Release 11.5.10 customers and the waiver of Extended Support fees through December 2018 for EBS Release 12.1 customers. As part of his announcement, Cliff acknowledged the OAUG for representing members' interests and partnering with Oracle to bring about meaningful change to the established Oracle Support policies.

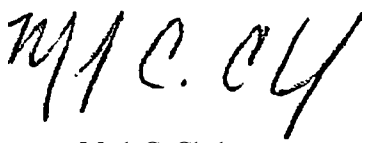
While the OAUG does recommend that EBS users should be moving to EBS R12.1, we understand that some customers have circumstances that prevent them from working on the upgrade as a top priority project. Advocating to Oracle on behalf of those customers is just one example of the OAUG embodying its mission to influence change. I'd like to thank the OAUG Customer Support Council, under the leadership of co-chairs John Schmitz and Andy Farber, for their genuine and tireless work on behalf of OAUG members and their influence in bringing about the recent exceptions from Oracle Support. Learn more about the OAUG Customer Support Council and get details on the exceptions to Oracle's Support policies via the Resources tab on *oaug.org*.

One of the OAUG's most influential advocacy groups is the OAUG Customer Support Council. The council serves to help OAUG members understand Oracle Support services and to represent members' challenges and interests to Oracle.

As the 2013 OAUG Board of Directors prepares to take office in January, this group of dedicated professionals will be volunteering their time and expertise to continue bringing OAUG members the programs, events, connections and dialogue that deliver exceptional Education. Networking. Influence.

If you have questions, suggestions or feedback about OAUG resources and programs, feel free to contact me at mclark@oaug.com.

Regards,



Mark C. Clark

Myths, Mysteries and Misconceptions

The world is full of unexplained phenomena, unanswered questions, and theories and speculations that may never be proven. The benefits of OAUG membership, however, do not fall into any of those categories.

There are some common questions and misconceptions about OAUG membership. The good news is that we can shed some light on some of the areas where there may be confusion. The even better news: your membership is probably more valuable than you even realize.

Steven R. Hughes
OAUG Executive Director
shughes@oaug.com

Here are a few misconceptions dispelled:

Is our organization's OAUG membership limited to a certain number of employees?

No, there is no limit to the number of employees who can access OAUG members-only benefits. Your OAUG corporate membership provides every employee in your organization access to exclusive educational and networking resources, such as the OAUG Conference Paper Database, live and recorded OAUG eLearning sessions, the OAUG Member Database and a variety of informative publications. The more employees you have taking advantage of member benefits, the higher the return on your membership investment.

How much will it cost our organization's employees to access OAUG members-only resources?

Every employee in an OAUG member organization has access to OAUG members-only resources – at no additional cost. Once your organization establishes or renews its OAUG corporate membership, every employee can create an individual OAUG member login. This individual member login allows every employee to take advantage of the programs that are most relevant to their needs. And there is no additional per-person cost. Visit *oaug.org*, and select "Member Login" at the top right of the website home page to create a member login or access an existing one.

Sometimes our employees are unable to attend scheduled programs. How can we benefit from these resources?

Archived programs and publications extend the value OAUG membership benefits. For example, the extensive OAUG Conference Paper Database and the library of recorded OAUG eLearning sessions provide just-in-time informational and learning opportunities that members can access any time. A member login is required.

How many of our organization's employees can read *OAUG Insight* magazine?

***OAUG Insight* magazine is available to every employee in an OAUG member organization.** *OAUG Insight* magazine contains practical how-to articles, tips and tricks, implementation techniques,

> *The good news is that we can shed some light on some of the areas where there may be confusion. The even better news: your membership is probably more valuable than you even realize.*

new product information, Oracle news, industry trends and more. This quarterly magazine is available in its electronic format to anyone with an OAUG member login. Member organizations also receive up to 10 hard-copy subscriptions to *OAUG Insight*. Contact membership@oaug.com to find out how to subscribe to the hard-copy version of *OAUG Insight* magazine. Select OAUG Publications under the Communications tab on *oaug.org* to read the electronic version of *OAUG Insight* magazine and to see a list of other OAUG publications.

Do OAUG members receive special pricing options on conferences?

Yes, OAUG members enjoy significant conference discounts. Membership in the OAUG provides valuable training and networking benefits for your entire organization all year as well as significant savings on COLLABORATE or OAUG Connection Point® conference registrations. Registration for COLLABORATE 13, April 7-11, 2013, in Denver, Colo., is now open. OAUG members can save up to $380 per person. When two or more people from your organization attend COLLABORATE, your OAUG membership practically pays for itself.

I encourage you to take a moment to review the list of common questions or misconceptions about OAUG membership benefits above to make sure you are gaining the most value from your OAUG membership. Contact membership@oaug.com if you require any additional information or assistance related to your organization's OAUG membership.

Questions, concerns and feedback are welcome any time. Contact me at shughes@oaug.com.

Regards,

Steven R. Hughes

EBS R12.1.3 Upgrade Success Story at Louisville Water Company

When Emily O'Mara, business systems analyst for Louisville Water Company (LWC), was told her organization would be upgrading its Oracle E-Business Suite from 11.5.10 to 12.1.3 in May 2011, it took her by surprise. R12 was something that had been talked about at LWC, but in the middle of a busy year with limited resources, it wasn't on the radar. Nevertheless, Emily and her team rose to the challenge to get the upgrade implemented, tested and live in six months. She sat down with *OAUG Insight m*agazine to talk about the project to share experiences and lessons learned.

What can you tell us about the Louisville Water Company and how you use Oracle Applications?

Louisville Water Company (LWC) was founded in 1854 – we predate the Stone Age! Today, our 430 employees provide safe, clean, award-winning drinking water to more than 850,000 residents in Jefferson County, Kentucky, and the surrounding six counties. We require a whole host of solutions to pull this off.

In September 2003, we converted from a homegrown financial system to Oracle E-Business Suite (EBS) 11.5.7 with an upgrade to 11.5.10 in November 2005. We use GL, Payables, Receivables, Procurement (including iProcurement), Assets, Project Billing, Cash Management, Inventory and Oracle Time and Labor. We have about 30 heavy users and 200 casual users.

Earlier this year, we augmented our Procurement applications with the implementation of the iSupplier Portal and iSourcing modules. We use PeopleSoft for HR, benefits and payroll processing. Our customer information/billing system is currently licensed from a company called Vertex, but this soon will be changing. We recently decided to implement Oracle's Customer Care and Billing system (CC&B) for billing, work and asset management, and mobile workforce management. So, we are inching toward becoming a true Oracle shop.

What drove LWC to make the decision to upgrade to Oracle E-Business Suite R12?

Like many EBS customers, we were concerned about 11i being de-supported. Oracle keeps sliding the Extended Support deadline out, but we didn't suspect they would do that at the time of the decision. Another concern for us was that we wanted to upgrade PeopleSoft, too. We have a very small IT shop with many of the same resources supporting EBS and PeopleSoft, so we needed to have EBS R12 in place and stabilized before moving on to the next upgrade.

Ultimately, we needed to free up all our resources for the CC&B implementation, which would be a major undertaking for several years, involving full-time commitment from resources across all areas of LWC.

Once that project was underway, we knew absolutely everything else would be on the backburner. If we didn't upgrade to R12 when we did, we wouldn't get the chance for an EBS upgrade again until 2015.

So once the decision was made, what plan was put in place to make the upgrade happen?

Our steering team of senior and executive managers initially drove the effort and provided support throughout the project. We began the upgrade from a functional applications perspective in May 2011. We went live roughly on target mid-month in October 2011. A timeline was created to mark the major milestones and deliverables, identifying the resources needed to achieve each one.

Then we put the resources in place. Three IT resources and five functional resources were committed 50 percent of the time to the upgrade. Unfortunately, we couldn't dedicate a team 100 percent, although I'm sure that's a recommended best practice for an upgrade. And when I say 50 percent of the time, I'm not talking about half a normal workday. As we all had to maintain our "day jobs" during the upgrade, most team members' workdays stretched to 12-14 hours, especially the closer we crept toward go-live. It was six months of a lot of hard work, but we did it. We hired two retired employees on a part-time basis to help with the backlog in Purchasing and General Accounting. We also used consultants: one full-time functional analyst for Procurement and one part-time functional for everything else. Technical consultants were used for very small, specific tasks like XML payment formats and some interface redevelopment.

The upgrade team essentially performed three rounds of rigorous, thorough functional testing leading up to go-live. One lesson learned from past upgrades and implementations that we applied this time around is that there is no such thing as too much testing!

On top of a lot of testing, we held regularly scheduled meetings almost weekly (and at one point daily) to discuss the progress of the testing and the project as a whole. I'm not a big fan of meetings, but during this project, I found that having the discipline to meet with the internal testing team, steering team, IT and the consultants regularly really helped keep things on track and dealt with potential roadblocks before they became actual roadblocks to success.

Why Upgrade to EBS R12?

- **Oracle Extended Support for 11i is ending soon.**
- **Other corporate initiatives could get in the way and delay your EBS upgrade for a prolonged period of time.**
- **R12 includes updates that reflect changes to the globalized business world since EBS 11i.**

You didn't mention training or change management. Aren't those necessary with R12?

In our case, they weren't. We'd been using EBS for eight years at that point, and we found that the functionality, look and feel of R12 weren't so different from 11i that we needed to retrain our experienced users.

Of course, communication to our end-user community about the upgrade was important. Notices in our company newsletter were published, and meetings with departments outside Finance were held to make sure everyone was aware of what was going on. We included a lot of our heavy users in the testing phase, which adequately prepared them for R12. I've found that as long as end users know what is happening and when, can get into the test instance before go-live to poke around and have someone to call for help, you don't need much of a training plan.

What lessons can you share about your project plan? What will you do differently next time?

The first lesson learned is that you need to define your scope relative to the resources you have, or like in our case, the resources you don't have. Our original project plan included not only upgrading the application, but implementing new applications in Procurement, cleaning up data, looking into archiving and changing our business processes. We thought "Hey, we're upgrading; let's take this opportunity to do all this other stuff." But with a team dedicated only 50 percent of the time to the upgrade, we were barely able to squeeze in the upgrade itself. The rest of the tasks were completely out of the question and had to be addressed after go-live.

Tips for Upgrade Project Planning

- **Keep your scope minimized to a technical upgrade if budget and time are limited.**
- **Establish good communication between IT and functional users at the beginning of the project and keep it up throughout the project.**
- **Use vetted consultants strategically, only for the tasks you need.**

Another lesson learned, and we've all heard this one before, is that the IT and functional team members really need to improve communication during the upgrade. My advice to make this happen if you're functional like me is to sit down with your IT director before the upgrade project starts. Ask him or her about all the internal technical employees who will be dedicated to the team (no matter how small the role). Share vacation and out-of-the-office schedules of all upgrade team members. In our case, some of our resources had previously made vacation or professional development plans that could not be changed after the upgrade effort was announced.

Also ask if any additional hardware, like databases, servers, etc., is needed for the upgrade. Finally, inquire about any other IT projects in progress or scheduled concurrently with the R12 upgrade that could potentially impact the project. Then once the upgrade project is underway, periodically ask for updates about the other IT projects, the procurement and installation of any additional hardware needed, and resource availability to make sure nothing is getting in the way of your go-live target.

The final lesson learned involves using consultants effectively. Like many customers, we didn't know a lot about R12 before the upgrade and didn't know how much outside help we would need to get there. About the only thing we did know is that we wanted the project to be successful! Now that our hindsight is 20/20, it turns out that we didn't need consultants as much as we initially thought.

As I mentioned before, R12 is not that overwhelming for veteran EBS users, so you most likely won't need training to get going on testing. I'll share tips for testing and troubleshooting later; you can definitely handle those tasks in-house.

You will need consultants for any resource or skills gaps. Let's say you don't have a hands-on project manager, or your Receivables manager just left the company. Consultants can provide project management services or functional analysts to do the busy work of testing that you may not be able to do yourself. We needed outsourced developers for XML templates and the changes with what Oracle refers to as "Trading Community Architecture," which I will definitely talk about in more detail later. It's best to work with a partner who is flexible: there when you need them, out of the way when you don't.

One other thing I would suggest about consultants is that if a consultant is to be assigned to your team, ask to see that individual's resume – not a generic job description – before that resource is officially part of your team. R12 has been available since 2007, so whoever is assigned to your project should have a minimum of two to three years of experience helping other customers upgrade to R12. You need to make the decision regarding who will be on your upgrade team. Don't let the project manager on the consultant's side make the call.

R12 includes new acronyms like SLA, MOAC, XML and TCA. Can you tell us a little about those, how they affected LWC and how they may affect other users?

SLA is Subledger Accounting, which I found acts as an invisible middleman between the general ledger and all other modules that generate accounting entries. Everything has to move through the Subledger before it posts to the general ledger. It's not a separate application but rather integrated functionality that you most likely won't even notice. Most of the setup is already there when you upgrade, and we didn't need any training or prior understanding to use it. You'll notice in your testing that the requests that create accounting and transfer to GL in some modules have changed and are either named something new or are different processes altogether.

Another thing to watch out for with SLA is any customizations that you may have regarding how transactions create accounting. SLA could interfere with these, so make sure all accounting transactions are being fully imported and posted to GL in your testing. One final thing I will say about SLA regards your

older accounting data from 11i that you may need to interact with in R12. If it's older than twelve months, look into running a process called "Upgrade Historical Subledger Transaction Accounting" for individual modules affected. In our case, we only needed this process to update Receivables and Payables transactions.

MOAC, or Multi Org Access Control, is really handy if you maintain more than one operating unit or company in your EBS. MOAC allows you to enter transactions for more than one operating unit at a time from the same responsibility, and also allows you to run reports for multiple operating units. If you only have one operating unit, like LWC, well, then it's not very helpful at all! Users will notice new operating unit fields in some transaction forms and perhaps additional parameters for some reports and processes. If you only have one operating unit, you can hard code it to a profile option through System Administrator (MO: Operating Unit). I'd recommend that you test all the reports and processes that you run often to make sure MOAC isn't going to cause you further issues in the setups of reports. There may be additional steps you need to take beyond setting that profile option for some reports.

R12 also introduces select reports and print documents that are in XML, or Extensible Markup Language. These reports have attached templates that can be altered very easily by functional end users. You can update the format of a report and add features like corporate logos. We found these to be extremely helpful and easy to use for Receivables documents such as statements and invoices. We've wanted to change these seeded layouts for a long time, and now we can! I have found that it is difficult to almost impossible to update XML templates to add and delete fields not currently on the seeded reports without a lot of expertise in the XML language. If that's what you want to do, you'll need to seek the help of an experienced XML developer.

Another element introduced in R12 is TCA, or Trading Community Architecture. We found this really changed the forms we use to create and maintain Suppliers, Customers and Banks. These forms are now Web-based and look very different from their 11i counterparts. All the information will carry over, but you might need a GPS device to find it in R12!

What I would tell other users to watch out for are your interfaces. If you have any interfaces that create Suppliers or Customers from another system, you'll most likely have to retool those interfaces to work with all the changes to these tables and fields. We had an offshore developer recreate an interface that created Suppliers from our billing system for us as we didn't have the time to figure out how to recreate it ourselves.

Another piece of advice about TCA deals with banks. In 11i, you enter all Banks, whether internal to your company or external to suppliers and customers, in the Banks setup tables. In R12, you create banks for suppliers and customer "on the fly" so to speak, within the Supplier and Customer setup forms. The Bank setup forms are for internal bank accounts only. So the Banks in 11i will be mapped to the Banks forms in R12 if they are internal, and will be mapped to Suppliers and Customers setup if they are external.

We're out of time, but are you able to come back for the next issue of *OAUG Insight* to talk about other R12 topics, including all those crazy changes to Payables, reporting, testing, and how your go-live went?

Sure, I'd be glad to. Stay tuned!

New EBS R12 Functionality at a Glance

- **SLA – Watch your nightly transfers to GL, accounting customizations and old 11i accounting data.**
- **MOAC – No benefit if your organization only has one Operating Unit; set profiles to default.**
- **XML – Easy to change the look of reports, difficult to change content of reports.**
- **TCA – Customers, Suppliers and Banks are very different; ask for help in reworking any interfaces to these forms from other systems.**

Emily O'Mara is a business systems analyst for Louisville Water Company in Louisville, KY. She has extensive experience supporting Oracle E-Business Suite and PeopleSoft HRMS applications. Emily and her hats were seen presenting "Secrets of My R12 Success" at COLLABORATE 12 in Las Vegas and OAUG Connection Point 2012 in Austin, TX. Contact Emily at eomara@lwcky.com.

NEENAH PAPER

Drives Customer Service and Operational Efficiency with Demantra and ASCP

By Brian Danz,
Neenah Paper, Inc.

At Neenah Paper, our vision is to create value by improving the image and performance of everything we touch, and it is our employees who drive this value.

Neenah Paper is a leader in premium image and performance-based products, including filtration, specialized substrates used for tapes, labels and other products, and high-end printing papers. Products are marketed under well-known brands such as CLASSIC®, ASTROBRIGHTS®, ENVIRONMENT®, Royal Sundance™, KIMDURA®, Gessner®, JET-PRO® SofStretch™ and varitess®. Neenah Paper is headquartered in Alpharetta, Georgia, and sells products in more than 70 countries worldwide from manufacturing operations in the United States and Germany. Additional information about Neenah Paper can be found at *www.neenah.com.*

INTRODUCTION

In February 2011, Neenah Paper kicked off a project to implement Demantra Demand Management and Oracle Advanced Supply Chain Planning (ASCP). Our goals were to improve product availability and service while at the same time reducing working capital and maximizing operational efficiencies. This was our first, system-driven, planning and forecasting process since implementing Oracle E-Business Suite (EBS) in 2005.

In this article I will explain the reasons that drove our decision to implement Oracle's Value Chain products, our project approach, selected configuration decisions, how we adapted our business processes to use these new tools and the benefits we have realized.

WHY DEMANTRA AND ASCP?

When we implemented Oracle EBS, our focus was on the successful implementation of the core EBS modules. We had recently been spun off of a global consumer products company and had to build our own ERP foundation. By 2010, we had several years of experience and data in our Oracle environment. Our EBS footprint was stable, and the time was right to take the next step.

While we had streamlined our planning teams and greatly improved both inventory management and scheduling, underlying processes remained very manual. Past practice, personal experience and average use/sales – rather than planned jobs or detailed forecasts – often guided inventory replenishment and raw material orders. Our long-term capacity and production plans were missing quality demand input. All quoting and scenario "what if" planning was done using Excel schedules, general run cycles, planner knowledge, limited system information and often consultation of manufacturing for machine capability and materials availability. Everything from identifying stocking needs to moving material involved a manual process, interfacing with Oracle, to achieve the desired result.

As a business, we wanted to reduce working capital, optimize capacity utilization and provide better input into the planning process. Improvements such as better visibility to orders at risk of being delayed, a process to help forecast and manage new product introductions, and better demand collaboration tools could help us maintain our leadership position for customer service.

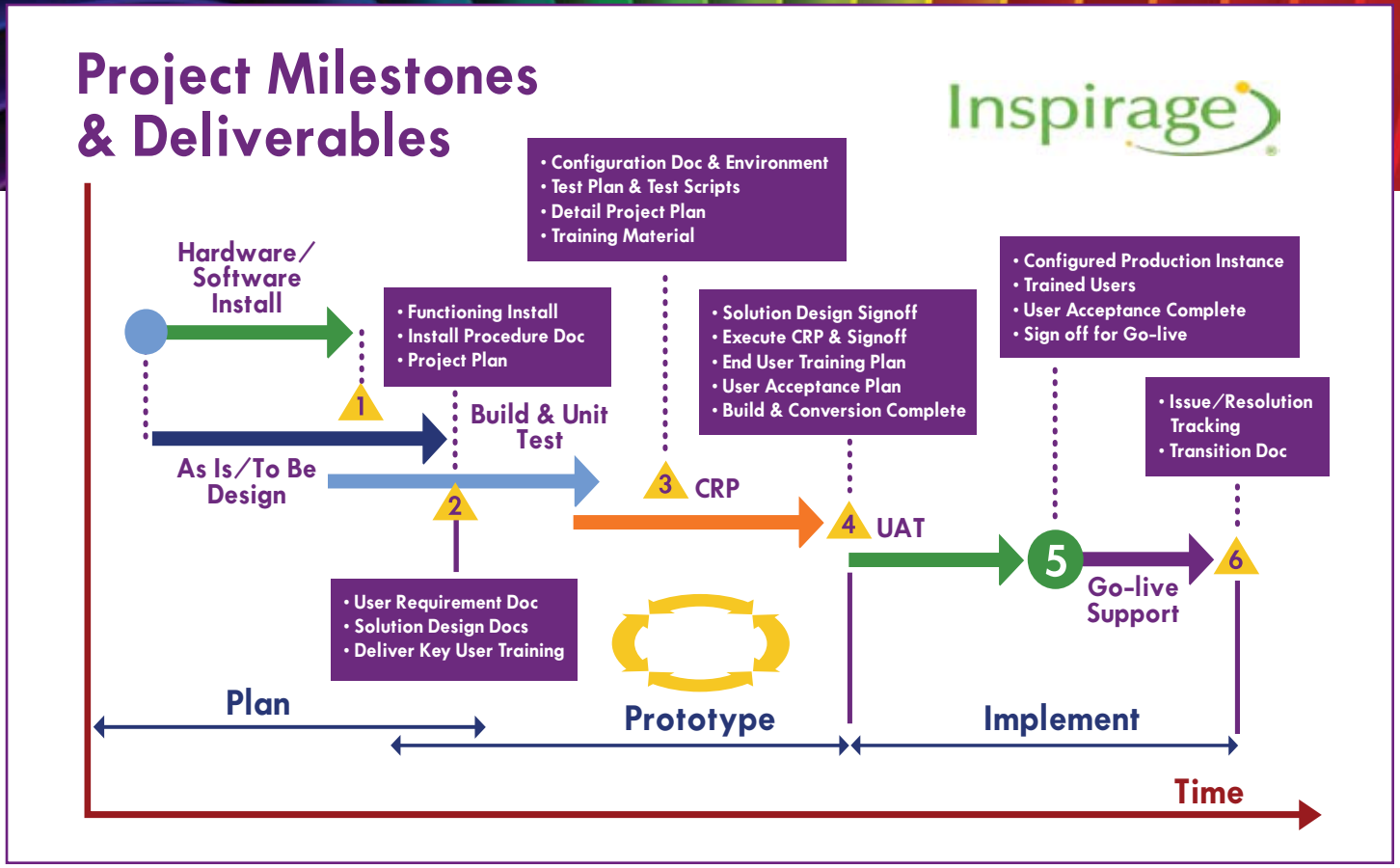
Oracle's value chain planning (VCP) products would help us reinforce consistent planning processes across multiple business units, improve distribution planning capabilities, provide better analysis capabilities and lay a foundation for future process improvements.

After nearly two years of investigation and discussion with several implementation partners, we made the decision to have global consulting firm Inspirage assist us in a pre-implementation study to evaluate product fit. During that process, we decided that the most important modules to focus on were Demantra and ASCP. We felt that these modules could have an immediate and positive impact without significant business disruption or excessive project costs. We also believed Demantra and ASCP helped us establish a framework for business process improvement and future system projects.

> **"As we kicked off the project, our mantra was "premium non nocere," or in English, "first, do no harm." Often, system projects can have unintended consequences, both good and bad. We had a successful planning and execution process that we wanted to improve, not disrupt."**

PROJECT MANAGEMENT APPROACH

The first step in our process was to select a quality implementation partner. Neenah Paper, Inc. has demonstrated a regular cadence of strategic execution, and we knew we were not going to hit the pause button on our business while we implemented new system tools and processes. We knew that if internal employees had to learn the modules and then redesign processes and implement the new modules, it would take our focus off of strategic objectives and day-to-day operations.



We needed a partner with the right experience to help us implement. In our search, we interviewed four very qualified implementation partners. We looked at their track records and areas of specialization. We also closely evaluated the guidance and knowledge transfer offered during preliminary discussions around the Oracle VCP products.

The second phase was chartering a project team to have our lead candidate come in and conduct a "Pre-Implementation Study." The purpose of the study was to further evaluate the implementation partner, establish an improved definition of scope, get a better estimate of resources and cost for a successful project, and begin the learning process for internal resources. The primary outcomes of the study were to finalize the decision to implement Demantra then ASCP and to select Inspirage as our implementation partner.

As we kicked off the project, our mantra was "premium non nocere," or in English, "first, do no harm." Often, system projects can have unintended consequences, both good and bad. We had a successful planning and execution process that we wanted to improve, not disrupt. This meant that we may take smaller, incremental steps toward full utilization of the new modules, but those steps would be more controlled and would carry us on a path of continuous improvement.

We adopted the Inspirage implementation strategy of plan, prototype and implement. We felt this gave us a chance to design a better product by defining the objectives, test our decisions and plan in a real system environment, and then implement a proven solution. In fact, for the ASCP portion of the project, we actually did two conference room pilots to ensure that we had a workable process to implement.

PROJECT EXECUTION

Our first project milestone was configuring and installing Demantra Demand Management to calculate a dynamic forecast that could not only be used to feed ASCP but also be incorporated to immediately improve our existing planning process by providing better information for replenishment decisions. After our initial plan and build, we made the decision to implement with monthly forecast buckets and forecast at the Item-Org-Site level. We also decided against a complex multi-level hierarchy and implemented a very flat structure that provides us with significant opportunities to slice and dice the forecast as well as aggregate and disaggregate it

to match the perspectives of different business functions or needs. Out of the gate, we did not pursue all of the bells and whistles that Demantra DM offers. We focused on the core functionality, basic worksheets and a limited user base.

When we came to ASCP, there were some significant hurdles to translate our business needs into something that we could model in Oracle. The first hurdle was that during our EBS implementation, we decided to utilize one organization to represent all of our Wisconsin Operations. This spanned four separate facilities.

Early in our planning phase, we identified the need to split the single organization. During the project, we successfully designed a solution to split each of our paper mills into separate organizations and then designed a process to perform seamless material movement into the original "Primary" organization for finishing and distribution. This allowed unconstrained ASCP to recommend raw material replenishment for each physical facility, rather than at an aggregate level. We were able to minimize the overhead required and yet allow the material planners to use the functionality of ASCP.

The second major hurdle was identifying a solution whereby we could have intermediate rolls of material be assigned to and logically planned against a specific job, based not only on the item but also on lot attributes. This was key because as we make full reels of paper and slit them into rolls we did not want to have to have different items for every conceivable width or watermark. Inspirage was able to work with us and recommended the use of Seiban functionality in the ASCP plan to allocate specific lots of product for planning purposes while allowing other lots to be generally available for the plan to allocate. Essentially, this meant the plan run is treating portions of the plan as a project without having to maintain the overhead of projects on the EBS execution side. This provided even greater benefit to our long-term planning process than we had built into the project justification.

MEASURING SUCCESS

To justify the cost associated with the hardware and implementation, we had to complete a capital appropriation and establish how we would measure the business benefit of the project. We looked carefully at the different areas of anticipated benefit and found three key areas where we could define a financial business benefit as well as the metrics to evaluate our performance:

1. We identified that ASCP would provide improved visibility to material demands that would enable the reduction of raw material inventories across our business. We committed to a five percent reduction in raw material inventories.

2. For Demantra, we said that better forecast visibility would enable us to maintain high levels of product availability while reducing both WIP and finished goods inventories across the business. We committed to a three to five percent reduction of work in progress (WIP) and finished goods (FG) inventory. We also recognized that the improved forecast would allow us to increase stock sales by capturing orders that customers would not have placed if the product had been unavailable. To measure this, we used backorders as our proxy and committed to a 20 percent reduction in backorders. This meant improving our fill rate from 97.6 to 98.3 percent.

3. Beyond our commitments, we were also able to realize incremental benefits including the utilization of basic available-to-promise (ATP) functionality to provide ready dates for our Customer Service group. Demantra provided us with a tool to engage in demand-planning collaboration activities with our customers to help build a better demand picture. This improved demand plan translates to better service and more effective inventory programs.

LESSONS LEARNED

I would like to reinforce the areas where we felt we were very successful in our project planning and execution:

- **Having Oracle EBS in place and established helped minimize the need for change management.**
- **Focusing on solid source data is key to quality system output.**
- **Selecting a solid implementation partner and conducting a pre-implementation assessment helped us get the best guidance to plan the project and execute on time and under budget.**
- **Implementing Demantra and ASCP together leveraged the synergies of both products and offered a phased approach that we could accomplish while continuing to run our business.**
- **Monthly forecast buckets and a flat hierarchy provided us with better and more flexible output from Demantra.**
- **Multiple conference room pilots for ASCP resulted in better project outcomes.**
- **Taking small steps in our implementation allowed us to achieve a high level of new functionality to build upon without causing significant business disruption.**
- **Value Chain Planning implementations do not have to be painful.**

Since the implementation of Demantra and ASCP, we have continued our cadence of action by acquiring premium brands from Wausau Paper Corp. With the acquisition, we became active players in consumer sales channels that complement our historical commercial business. Our forecasting and planning capabilities are paramount to success in these new channels. Implementation of Demantra and ASCP helped prepare us for the integration activities that followed and provided a foundation for continuous improvement into the future.

Brian Danz is the Manager of Production Planning for the Fine Paper business of Neenah Paper, Inc. He has a degree in Paper Science and Engineering from the University of Wisconsin – Stevens Point and over 13 years of experience in operations, ERP implementation and supply chain planning. Special thanks go out to the Neenah Paper implementation team and Inspirage for helping to make our project a sucess.

THE PROOF IS IN THE PRESS RELEASE

NEENAH PAPER REPORTS 2011 THIRD-QUARTER RESULTS

Cash flow provided from operations was $25.0 million in the third quarter of 2011 compared to $13.7 million in the third quarter of 2010. ***Cash flow was higher in 2011 as a result of increased earnings and reductions in working capital during the quarter.***

NEENAH PAPER FOURTH QUARTER & FULL YEAR RESULTS

Cash flow provided from operations in the fourth quarter of 2011 was $17.7 million compared to $12.1 million in the same period of 2010. ***Increased cash flow in 2011 resulted from higher earnings and improvements in working capital.***

Best Practices for Oracle User Productivity Kit (UPK)

By Lissa English, Alticor

Defining Standards • Securing Content • Using the Library • Publishing

The Oracle User Productivity Kit (UPK) provides a platform for collaboration and content development in a multi-user environment. Alticor Inc., a global company offering products, business opportunities and manufacturing and logistics services in more than 80 countries and territories worldwide, has identified some best practices for using UPK. They include defining standards, securing content, using the library and publishing.

Define Standards

Defining standards to outline what you do and don't want to see in your simulations is an important first step to take before creating a UPK development strategy. The UPK default settings, configured out of the box, are great. But users may want to customize settings.

Color. An organization may wish to customize the UPK color scheme based on the organization's standards. In that case, prepare authors to select the desired colors by providing them the RGB code so that everyone is using the right shades. There are other considerations as well. For instance, if printed in black and white, can outputs be viewed properly? Or can color-blind members of the team differentiate between color combinations?

Font Style. It is also important to define the use of font style and size, line thickness, acronyms and screen resolution. It may sound like over-engineering, but when each author uses his or her own preferences to build content, a lack of consistency can be distracting. You don't want people to be distracted by differently colored or sized fonts. You want your audience to focus on the key messages, and consistency will help.

Content. It is important to define how and what information will be put into bubble text. Do you want to include process information? If so, to what level of detail? If not, what information should be included? Do you only include the recorded text? Will you use concept frames or webpages? If so, what type of information should be contained in each of them? What common verbiage should or should not be used? Where and what requires bold or italics text? These are all questions with no right or wrong answer. It is up to each user to determine what is best for its audience and define the parameters so that authors are consistent.

Naming Conventions. Naming conventions are important for good organization and consistency. Naming conventions simply lay out how authors will create names for items to avoid confusion and make it easier to know how to search. The following are three criteria for naming files:

- Entering Timecards.
- Timecard Entry.
- Enter Timecards.

Which is correct? That depends on your naming convention. If you want to begin your file names with a noun, then Timecard Entry is correct. If you determine you want your files to begin with a verb, then Enter Timecards is correct. Think about how your audience may search for the information if they don't know the exact name or title they need. You know your audience, so take the path of least resistance.

Rules. Determine how authors will check in and check out topics (topic by topic or section by section, a single topic or blocks of topics)? Is it OK to reorganize the library or outline, or should the team be consulted first? How will you work together as a team? What is your review cycle? Once you have the rules and standards defined, assign an owner to put all of the decisions in writing. It is important to define standards before beginning development work.

I recommend holding a working session with your team to discuss and define standards and document results in a style guide. Your standards could be one element of your development strategy for your project. This can save a lot of rework, time and frustration by nailing down details up front. You will have a happier team in the end.

Securing Content

By default, all authors within UPK have the ability to modify documents in the library. Folders can be restricted by author or by user group. Take time to consider which authors will have access to which folders in the library. One approach is to start with fewer restrictions and then tighten them up as needed over time. Alternatively, start more restrictive and loosen the restrictions as needed over time. Again, know your audience and your organization and make the appropriate choice for your project.

The UPK administrator can set the following permissions for any folder in the library:

List Folder Contents. Authors cannot save to folders with this permission. An author can view the names of documents in a library folder but cannot open a document in any editor and perform actions that would change the document content or its location in the library. An author also cannot make a copy of the document in any way.

Read. An author can open a document in an editor, but cannot perform any actions that would change the document content or its location in the library. An author can make a copy (including Save As) of the document and store it in a folder location for which she has appropriate permissions.

Modify. An author has complete access to the folder and its documents and can perform any action (create, modify, copy, delete, publish, export and so on).

Checking In, Checking Out

Before beginning any work, make sure that all documents are checked in so that you are beginning with a clean slate. Use the Check In All command to get started.

When authors are ready to begin working on a document, they should then use the Check Out command, which blocks others from being able to make modifications at the same time. When checking out documents, the author can choose to check out an individual document, the selected document and all related documents or all documents. I have found it best to only check out one document at a time, unless there are known changes that need to be made to more than one document.

When the author is finished modifying the document(s), she should use the Check In command, which allows other authors to make their changes without interfering with the first author's work. Add a note on what changed when you check your document back in so people will know what has changed.

If you want to work offline, use the Get command to download read-only copies of documents before going offline. If you don't know the specific document you need in order to work offline, use the Get All command to download all documents in the library.

Finally, put a formal process in place for checking in and out to ensure your team does it consistently. This helps eliminate frustration among the team and will ensure efficient and effective teamwork.

Using the Library

Before beginning development, design the library structure and agree as a team on how to use the library. It is important that all team members know how to use the library efficiently in order to effectively store documents where they were intended to be stored. Again, it is important to document the library design and use. This might be a second section in your development strategy.

When designing your library structure, the simpler the better. Just like using the Internet, you don't want to have to click 10 levels down to get to what you want or need. The same holds true here. Keep the number of folder levels small. It is best to have three or fewer clicks to get to what is needed. Overcomplicating the structure will lead to confusion and frustration. Design a structure that works for you, but keep it simple.

You can organize your library any way you like, by project, author, module, role, document type or any combination. The important thing is to take the time to consider all options and design the best structure for your project before you begin developing.

Once your design is confirmed, assign someone to mind the library structure. That individual should be responsible for creating the structure in the library and maintaining it. Maintenance of the library is just as important as the design. If you don't maintain the library according to your design, documents get lost and rework takes over. In addition, it is important to watch for and correct broken links that can occur when someone deletes a document from the library. You can use the "unlink" feature to help with this.

If you import content from another library, the import feature adopts the structure of the content being imported. It does not adopt the library structure for which the files are being imported into. So align your library structures before importing to make it easier and cleaner.

Finally, use your naming conventions. Structure and standards provide comfort and security to your team, knowing that if they follow the defined structure, naming conventions and other standards, they will remain organized, can find what they are looking for and minimize rework.

Using the Outline Editor

Keep the end result in mind when creating the outline structure. Think about how you want to distribute your documents or how you want to package them for the audience. This should be the framework for building structure in the outline editor. There are many ways to do this, by module, role, function, et cetera. Again, there is no right or wrong answer. Just organize according to what you want to deliver to your audience in the end.

Many people want to know where it is best to do their work, in the outline editor or the library. It really is a matter of preference.

Using the outline editor, links to other documents are created automatically. In the library, you have to create the links from your document to other documents. My preference is to use the outline editor because I don't have to think about how to link my documents or what to do if I delete a document from the outline editor. My links are automatically created. I always go back and double check my links after I have deleted a document, just to ensure that no other links were broken by deleting that document. You can also use the unlink feature before deleting.

Remember, if you delete a document from the outline editor, it does not remove it from the library. The document will remain in the library, so if it was linked to more than one document, those other links remain in place. As above, check to be sure the other links did not break.

Publishing

Publishing is performed as needed. When documents are first created and you are ready to produce your outputs, you can publish your materials. During publishing, you have the opportunity to choose the outputs you want. You can select them all or only a few. Once you publish, there is no need to republish until you have updates to the topics. Some recommendations:

- Designate one or two "publishers" who are responsible for publishing all content.
- Create a formal change request (maintenance and support) process.
- Republish when needed for maintenance.

Laying Out a UPK Project

It is important to create rules and standards for your project and even more important to ensure accountability for following them. Make sure everyone on the team understands rules and standards, and monitor work to ensure all who are collaborating within the multi-user environments adhere to them. Otherwise, you have spent a lot of time planning for no reason.

Establish the security path that is right for your organization. Determine if you need to be restrictive to begin or if you can tighten the restrictions as you go. You can always adjust the security as needed. The key is to put some thought into it and design your security path so that individuals can perform their jobs effectively and efficiently.

Using the check in and check out features appropriately will also allow staff to work effectively and efficiently. It also helps to view who else might have input to certain documents as you see who has a document checked out. In addition, administrators can view check-in and check-out history.

When building the outline and library structure, keep it as simple as possible. Don't over complicate the layout by having too much structure in place. Sometimes, less is more.

It is best to plan in advance of the start of your development. The more you plan, the more organized you will be. The more organized you are, the more efficient and effective your team will be. There is a lot to think about to prepare for your development work. Just remember that if you have a team, whether all in the same office or disparate, you can effectively collaborate using best business practices in a multi-user environment.

Lissa English is the global instructional design manager at Alticor, parent company of Amway Corp. She is a member of the Oracle Applications Users Group (OAUG) board of directors and serves on a number of the organization's functional committees and special interest groups (SIGs).

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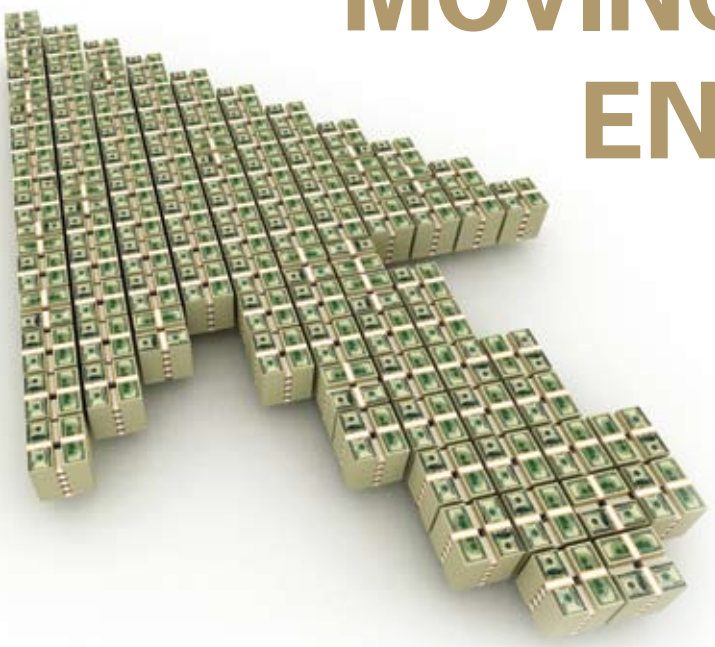


MOVING TO NEW ERP ENVIRONMENTS:

2012 OAUG Survey on ERP Upgrade Economics

By Joseph McKendrick, Analyst
Produced by Unisphere Research, a division of Information Today, Inc.

To paraphrase the famous Chrysler commercial, today's enterprise resource planning (ERP) systems are definitely not your father's ERP. Now, ERP systems are designed to be open and compatible with all the networks and clients that make up today's IT infrastructure. They deliver powerful analytics and are capable of ingesting and processing Big Data from any and all systems. Today's ERP either runs in or supports the cloud and supports the social enterprise.

However, it takes work, time and financial investments to keep up with the fast-evolving new ERP. Executives in charge of ERP applications are working hard to keep pace with new functionality and products coming from Oracle and other ERP vendors. As they seek to upgrade to new solutions, many are feeling intense budgetary pressure. Close to half of the executives in a new survey say they have held off on new upgrades for at least a few years. In the meantime, at least one out of four enterprises either are scaling back or have had to scale back their recent ERP projects due to budget constraints.

These conclusions are based on a new survey of 266 enterprise application and business managers involved with or knowledgeable about their organization's budgeting process, conducted among members of the Oracle Applications Users Group (OAUG). The survey, which explored ERP upgrade strategies, was fielded by Unisphere Research, a division of Information Today, Inc., in partnership with Fujitsu America, Inc. Corporation in August 2012.

This OAUG ResearchLine report was produced by Unisphere Research, a division of Information Today, Inc., in partnership with Fujitsu America, Inc. Corporation.

Sponsored by FUJITSU

Produced by UNISPHERE RESEARCH

Environments represented in the survey are primarily Oracle E-Business Suite implementations, including E-Business Suite 12.1, in place at 46 percent of respondents' sites, and EBS 11.5.10, in place at 51 percent. Overall, 95 percent of the survey respondents have a role in either directing or influencing ERP upgrade decisions. Respondents to the survey have a variety of job roles both within IT and business, and represent a wide range of organization types and sizes. About 54 percent of the respondents come from the information technology side of their organizations, while 25 percent are line-of-business executives, managers or professionals. Another 15 percent have bridging roles between IT and the business, such as that of architect or analyst.

Following is an abbreviated summary of the survey results. The full report is available to OAUG members at *oaug.org*.

The survey uncovered these key findings:

- A majority of respondents report that portions of their ERP upgrade budgets come from outside of the IT departments, particularly from finance. ERP upgrades are often big-budget projects, and thus likely to be subject to changing financial conditions occurring within organizations. Close to one-fourth of respondents report that their original ERP upgrade budgets have been scaled back over the past year due to economic circumstances. (See **Figure 1**.)
- While a portion of enterprises in the survey have been holding back on their ERP upgrades, a new round of upgrades is imminent. (See **Figure 2**.)

Figure 1: Is Original 2012 ERP Upgrade Budget Affected by Financial Considerations?

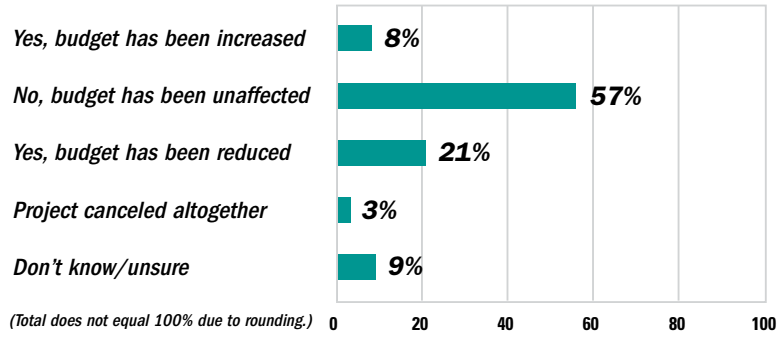
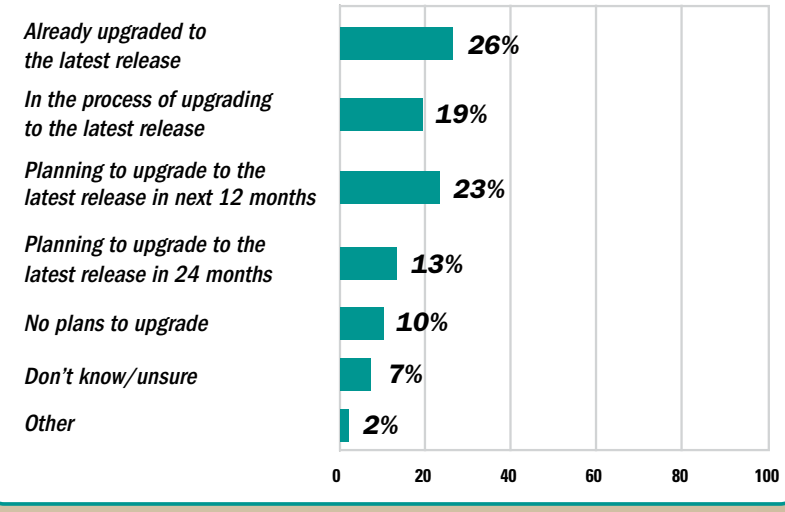


Figure 2: Current ERP Upgrade Plans



" Most ERP upgrade projects take up to a year to complete. Close to two-thirds of respondents report that their projects have been or are being delivered on time and on budget. About a third, however, tend to be more problematic, requiring reassessments of the current application environments, or running over budget. "

Figure 3: Additional IT Projects Conjoined With ERP Upgrade Projects

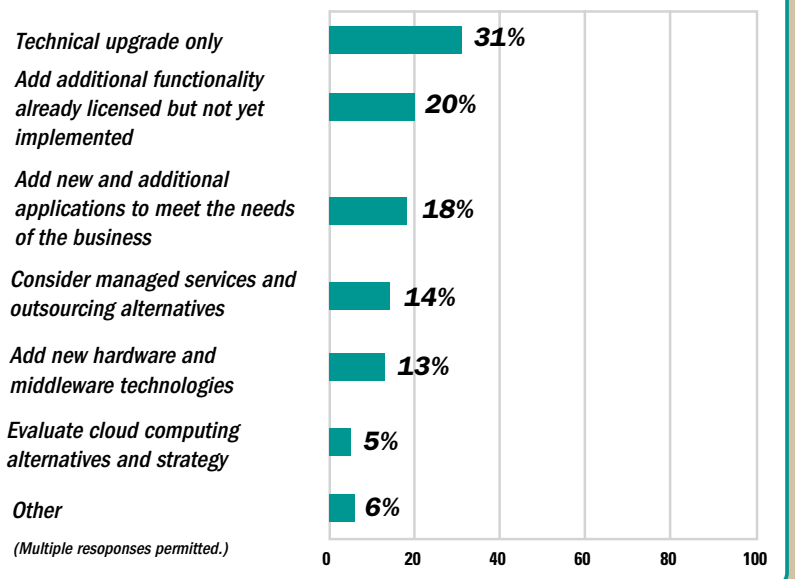
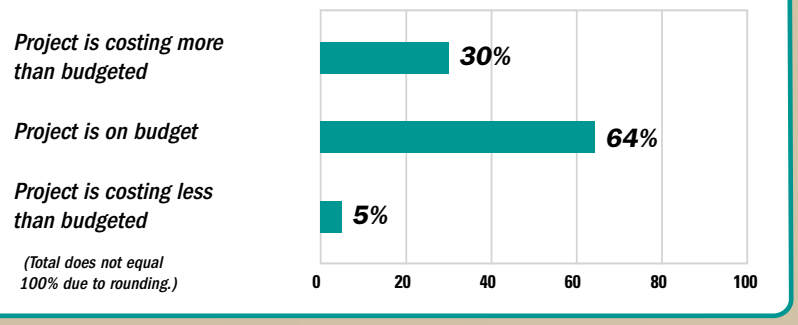


Figure 4: ERP Upgrade Meeting Original Budget Expectations?



- Due to their nature, most ERP upgrades are conducted as a single "big bang," versus more incremental approaches. Respondents are divided on whether they will be using the upgrade to expand functionality, or to simply make a technical upgrade. (See **Figure 3**.) Financial and procurement applications are the areas being targeted the most for upgrades.
- Most ERP upgrade projects take up to a year to complete. Close to two-thirds of respondents report that their projects have been or are being delivered on time and on budget. (See **Figure 4**.) About a third, however, tend to be more problematic, requiring reassessments of the current application environments, or running over budget. (The issues that caused projects to be delayed or over budget were out of the scope of this survey.) Eighty percent of respondents say there is some disruption to their business as a result of their upgrades, but in most cases, these disruptions don't last more than five days.

OAUG ResearchLine **is an exclusive information resource for OAUG members.** ***OAUG ResearchLine*** **reports are available on the OAUG website at** ***oaug.org.*** **Click on the "Communications" tab and navigate to the "Publications" section to access** ***OAUG ResearchLine.***

OAUG™ oracle applications users group ResearchLine

OAUG Ambassadors

As the first year of the OAUG Ambassador Program draws to a close, the OAUG is pleased to announce that nearly 700 individuals are actively participating in the program and maximizing the value of their OAUG memberships. As of press time, nearly 600 OAUG Ambassadors attended one or more of the monthly OAUG Informational Webinars, more than 300 encouraged their colleagues to set up individual OAUG Member Logins in order to access the OAUG's free online education, and more than 50 will be entered to win a full conference registration to the 2013 OAUG event of their choice as a result of their efforts throughout the year.

"Active OAUG Ambassadors provided exceptional direct and indirect insights into the needs of the Oracle Applications user community through their thoughtful questions and feedback this year."

Not only does the OAUG Ambassadors' participation assist their own colleagues through clear communication and understanding of member resources, the OAUG membership as a whole will benefit from the Ambassadors' responses to potential benefit additions or enhancements. "OAUG Ambassadors' participation and feedback will ultimately result in enhanced networking opportunities, education and ROI for OAUG members," said OAUG Executive Director Steven Hughes. "Active OAUG Ambassadors provided exceptional direct and indirect insights into the needs of the Oracle Applications user community through their thoughtful questions and feedback this year."

As a thank you, the OAUG plans to continue recognizing and rewarding its Ambassadors at all OAUG events as well as providing exclusive networking opportunities, including an OAUG Ambassador Appreciation event at COLLABORATE 13 and a new OAUG Ambassador LinkedIn Group.

Looking forward to 2013, the OAUG will continue building the Ambassador Program toward 100 percent participation of all member companies and organizations. The OAUG remains focused on connecting Oracle Applications users and solution providers to save individuals and organizations time and money through the Ambassador Program and others throughout the year.

To view the name and contact information for your organization's Ambassador, select Member Login at the top right of any page on the OAUG website, follow the prompts to log in and check the top left of your profile administration for your Ambassador information.

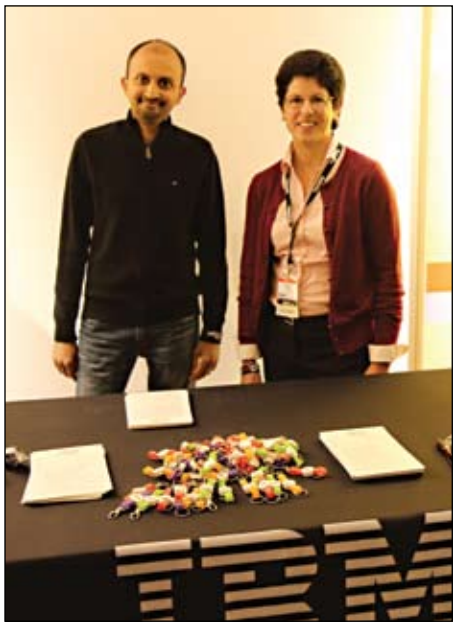
Please contact membership@oaug.com or +1 404.240.0897, extension 2, if you have any questions.

Thank you to our current OAUG Ambassadors for volunteering!

Scan the QR Code to go to the OAUG Ambassador section of the website!

ORACLE OPEN WORLD

OAUG Members Enjoy Educational and Networking Opportunities During Oracle OpenWorld 2012



IBM, sponsor of the OAUG Appreciation Reception.

Members and guests mingle at the OAUG Appreciation Reception, sponsored by IBM.

During the first week of October, the streets of downtown San Francisco were packed with attendees looking for opportunities to learn and network with fellow Oracle customers at Oracle OpenWorld 2012.

The Oracle Applications Users Group (OAUG) was well represented in the User Group Pavilion in Moscone Center West, offering a space for attendees to discover the educational and networking opportunities that a membership to the OAUG can offer. This year's membership campaign was a spin-off from COLLABORATE 12, with "Think OAUG, Ink the Deal to win an iPad." Non-members had a chance to win an iPad by joining during the conference and/or by the end of the year. Members who stopped by the booth were given fun screen and keyboard cleaners that also promoted the concept to Think OAUG when searching for education, networking opportunities and solutions for Oracle Applications.

The OAUG also launched its event mobile website, enabling conference attendees to scan a QR code with their smart

Stephen Hughes, OAUG Executive Director, and John Bushell, Vice President of AUSOUG.

phones to find important information about OAUG meetings and events during the week as well as important OAUG membership information – right in the palm of their hand.

On Sunday, September 30, 13 OAUG Geographic (Geos) and 47 Special Interest Groups (SIGs) held in-person meetings, hosting more than 3000 attendees. Members of all the OAUG affiliated user groups had the opportunity to connect with users to share common challenges and possible solutions.

Throughout the week, 27 OAUG members proudly represented the OAUG in their educational presentations at Oracle OpenWorld.

The OAUG hosted a special event exclusively for members and guests at its annual Appreciation Reception, which was sponsored by IBM. The celebratory event took place at the beautiful Weinstein Gallery across from Union Square. More than 200 attendees enjoyed the soulful sounds of jazz singer Lori Carsillo as they sipped cocktails and enjoyed the modern gallery. During the reception, the OAUG presented the 2012 Oracle Ambassador Awards to several Oracle employees (see page 28).

Oracle OpenWorld 2013 will take place September 22-26, 2013, in San Francisco, Calif.

Members and guests mingle at the OAUG Appreciation Reception, sponsored by IBM.

Doreen Fox-Dwyer and Kathleen Fauerbauch, OAUG Geo/SIG Co-Chairs, welcome attendees to the OAUG User Group Forum during Users Group Sunday at Oracle OpenWorld 2012.

2012 OAUG Oracle Ambassadors (left to right) Sherm Terry, Anne Carlson, John O'Rourke and Joshua Byford. Not pictured: Marcy Weliver.

OAUG President Mark Clark welcomes guests to the annual OAUG Appreciation Reception and presents the 2012 OAUG Oracle Ambassador Awards.

Oracle Employees Honored with the 2012 OAUG Oracle Ambassador Awards

Every year during Oracle OpenWorld the Oracle Applications Users Group (OAUG) recognizes Oracle employees who have significantly contributed to the OAUG's ongoing efforts to provide outstanding education, networking and advocacy opportunities for members. Recipients of the annual **OAUG Oracle Ambassador Award** are nominated by OAUG committee members and selected by the OAUG Board of Directors. This year, five fantastic Oracle employees were awarded with this honor at the 2012 OAUG Appreciation Reception.

Congratulations to all of the 2012 OAUG Oracle Ambassador Award Recipients!

Jazz singer Lori Carsillo entertains guests.

Joshua Byford, Principal Specialist, Proactive Support

For his significant role in the success of the OAUG Connection Point® Seminars with his help in organizing the Oracle "Meet the Experts" Program and arranging the Oracle Data Center Tour for attendees, the OAUG honored Joshua Byford.

Anne Carlson, Senior Director, Oracle E-Business Suite Product Strategy

For her availability, eagerness and wealth of knowledge of cross-product launch and adoption strategies as well as Oracle EBS Release 12.1 upgrade planning and best practices that she continues to share with OAUG members, the OAUG acknowledged Anne Carlson.

John O'Rourke, Vice President of Product Marketing, Oracle Enterprise Performance Management

For his dynamic and consistent support of the Hyperion SIG and the Hyperion user community, including networking events, training and OAUG conferences, the OAUG recognizes the time and commitment John O'Rourke has poured into helping the Oracle users community.

Sherm Terry, Vice President, Global Customer Support

For his active role in the OAUG Customer Support Council, his engagement and advocacy with OAUG members, and instrumental role in shaping Oracle Support practices and policies to improve the customer service experience, the OAUG acknowledged Sherm Terry.

Marcy Weliver, Alliance Director, Oracle West HCM Sales

For her longstanding service and advocacy to the OAUG since the early 1990s and for her help with organizing local meetings, the OAUG recognized Marcy Weliver for promoting membership and contributing to the growth of the OAUG community.

Congratulations to all of the 2012 OAUG Oracle Ambassador Award recipients!

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- Orlando, FL
- Austin, TX

13 Geos & **16** SIGs awarded the 2012 Certificate of Distinction.

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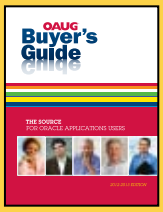
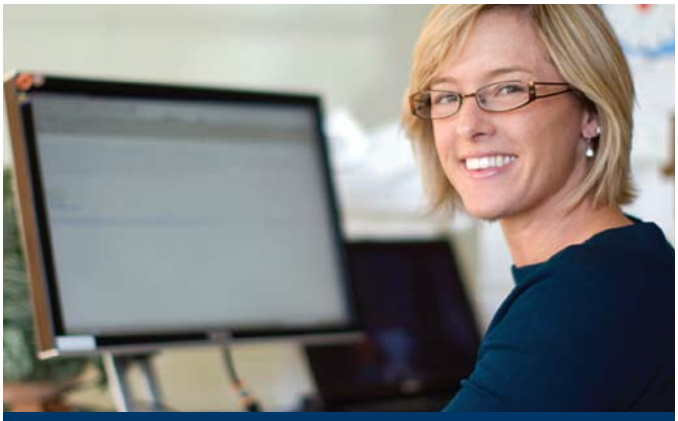


38 OAUG Star Partners or Associate Members featured in the 2012 OAUG Buyer's Guide

oaug.org



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Update on
Special Interest Groups (SIGs)

What is a Special Interest Group (SIG)?

Special Interest Groups (SIGs) are user groups that bring together members that share a common interest with specific Oracle Applications products. SIGs may also bring together members that 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*** under the **User Communities** tab.

2012 Special Interest Groups

ADI SIG
Aerospace & Defense SIG
AP SIG
AR, Credit & Collections SIG
Archive & Purge SIG
Assets SIG*
BI Publisher SIG (formerly XML Publisher SIG)
Change Management SIG
Channel Revenue SIG
Communications Billing and Revenue Management (BRM) SIG
Communications MetaSolv Solution SIG
Configurator SIG*
Consumer Goods SIG
Contracts SIG
Cost Management SIG*
Customer Data Management SIG
Customer Experience Community (CXC)
- CRM On Demand SIG
- Siebel SIG

Customization and Extension SIG
Database SIG*
Demantra SIG
Discrete Manufacturing SIG*
E-Business Applications Technology SIG
E-Business Suite SIG
E-Business Suite User Management SIG
EDI (e-Commerce Gateway) SIG
Energy & Utilities SIG*
Engineering & Construction SIG
Enterprise Asset Management (EAM) SIG*
Enterprise Visualization SIG
Federal SIG
Financial Services Industry SIG
Fusion Middleware SIG (formerly Service Oriented Architecture SIG)
General Ledger (GL) SIG*
Governance, Risk & Compliance SIG (formerly Internal Control and Security SIG)
Government Contractor SIG
Healthcare Industry User Group
Higher Education SIG
Hyperion SIG*
Incentive Compensation SIG
K-12 Education SIG*
Logistics SIG
Mergers & Acquisitions (M&A) SIG
Migration and Integration SIG
Multi-National/Multi-Org SIG
Oracle Agile/Enterprise PLM SIG
Oracle Business Intelligence (OBI) SIG
Oracle Primavera SIG (OPSIG)
Oracle Retail User Group (ORUG)
Order Management & Advanced Pricing (QP) SIG
Oracle Tax Management SIG
OTM SIG
Outsourcing & Shared Service Centers SIG
Process Manufacturing SIG*
Procurement SIG*
Projects SIG
Property Manager SIG*
Public Sector SIG*
Quality SIG
SysAdmin SIG
Treasury & Cash Management SIG
Tutor SIG
Upgrade SIG*
Value Chain Planning SIG (formerly Supply Chain Collaboration SIG)
Workflow SIG

* Special Acknowledgement *2012 OAUG Geo/SIG Certificate of Distinction Award recipient*

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Quest International Users Group

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 members 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 membership and participation in a user's local Geo. These benefits include:

- Communication with OAUG members 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*** under the **User Communities** tab.

Geos and SIGs serve the grassroots of the Oracle community and offer additional educational opportunities and new product enhancements through their links with Oracle Corporation.

2012 Geographic User Groups

Atlanta OAUG
AUSOUG (Australia)
British Columbia OAUG
Calgary OAUG
Central States OAUG
Colorado OAUG
DC-OAUG*
Eastern States OAUG
Florida OAUG*
German Oracle Users Group (DOAG)
Heartland OUG*
India OAUG*
Israel Oracle Users Group (ilOUG)
Japan-OAUG
Kansas City OAUG
Latin OAUG*
Michigan OAUG*
Mid-Atlantic OAUG
Middle East OUG
Netherlands OAUG
Nevada OAUG*
New England OAUG*
New Jersey OAUG
New South Wales OAUG
North Central OAUG*
Northern California OAUG*
Northern Ohio OAUG
Northwest OUG
NYC Metro OAUG (New York City)
Ohio Valley OAUG*
Oklahoma OAUG
ORAUG-Brazil
Pittsburgh OAUG
Queensland OAUG
San Diego OAUG
South Central OAUG
South Texas OAUG
Southern Australia OAUG
Southern Ontario OAUG
Southwest Regional OAUG*
Twin Cities Financials OAUG*
Twin Cities Manufacturing OAUG
Victorian OAUG
Western Australia OAUG

* Special Acknowledgement – *2012 OAUG Geo/SIG Certificate of Distinction Award Recipient*

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2012-2013 EDITION

OAUG Member Snapshot: **Maureen Bagley**

Many people would agree that being a wife and dedicated mother of three is a full-time job. Not for Maureen Bagley, who takes her maternal role very seriously as she also juggles other important roles such as her successful career as IT manager for Eaton Corporation and her stand-out active participation within the OAUG. For her commitment to the Northern Ohio Oracle Applications Users Group (NOOAUG), the OAUG Membership Committee and the OAUG at large, Maureen deservedly caught our attention when considering our member snapshot for this issue of *OAUG Insight*.

Eaton Corporation, a power management company, has been a member of the OAUG for more than six years when Maureen started working for the company. She became the OAUG Ambassador for Eaton and continued to educate and exploit the OAUG value proposition at her new employer. Maureen has been an active member of the OAUG for 12 years and has been a board member for the NOOAUG since its inception.

As a board member for the NOOAUG, Maureen helps engage members through quarterly meetings, golf outings and holiday events with presentations about Oracle Applications and networking opportunities throughout the year. Through her hard work and preparation around such meetings and events, she has been very successful at achieving strong attendance numbers with positive feedback. She is also a regular presenter at COLLABORATE and Oracle OpenWorld conferences on behalf of the NOOAUG.

> ***"The OAUG is all about knowledge and sharing. It is the greatest opportunity to meet and network with others that have used similar Oracle Applications and have faced and overcome similar challenges. Also, the valuable educational opportunities held for OAUG members throughout the year are unmatched."***

Her position as a devoted board member for the NOOAUG was not enough for Maureen. She soon set her sights at the OAUG Membership Committee to expand her impact on the Oracle community and became the main contact within the committee for Eaton.

"I believe in the OAUG and I liked the idea of helping to promote the organization to the world. The OAUG Membership Committee is a way to do just that," Maureen said.

When asked why she is so passionate about the OAUG, Maureen responded without hesitation, "The OAUG is all about knowledge and sharing. It is the greatest opportunity to meet and network with others that have used similar Oracle Applications and have faced and overcome similar challenges. Also, the valuable educational opportunities held for OAUG members throughout the year are unmatched. Through its webinars, lunch-and-learns, educational conferences and the OAUG whitepapers, there is something for everybody."

When Maureen is not chairing a meeting for the NOOAUG, volunteering with the OAUG Membership Committee, working as IT manager for Eaton or attending to the active lives of her three children, she likes to spend any down time watching sports: St. Louis Cardinal baseball and Purdue Boilermaker basketball, or going to see live music performances. That is, "Anything but country music."

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The OAUG welcomes the following new and returning members who joined July 1, 2012 through September 30, 2012.

Returning Associate Members:

Application Services LTD trading as Provanis
Business & Decision
Caci Enterprise Solutions
Capgemini
Cerebra Consulting Inc.
Global View Analytics, Inc.
i360technologies
KPMG LLP US
Linium
MarketSphere Consulting
Perficient
SoftArt Solutions Inc.
Zirtex Systems

Returning User Members:

A. M. Castle
Abt Associates Inc.
ACCO Brands, Inc.
Administrative Resource Ctr.
Advanced Drainage Systems
Advanced Electronics Co.
Agilent Technologies
Alkermes Inc.
Almac Group
Altec, Inc.
American Pacific Corporation
American Science and Engineering
Apt Management Services
Aramark
ASG Group Limited
Aspect Software
Atmos Energy Corporation
Atrium Medical Corporation
Australian Bureau of Statistics
Bankwest
Battelle Memorial Institute
Black & Veatch Corporation
Boardwalk Pipeline Partners
Brisbane City Council
Broadridge Financial Solutions
Bunnings Pty Ltd.
Bureau of Meteorology
Capital Power Corporation
Carnegie Mellon University
Charter Manufacturing Company, Inc.
Cherokee Nation Businesses
Citizens Bank
City of Chandler, Arizona
City of Las Vegas
Clinical Reference Laboratory
Commercial Metals Company
Coventry Group Limited
CSX Technology
Cummins, Inc.
Deakin University
DeKalb County Georgia
Demand Media
Department of Defence
Department of Planning
Dept. of Agriculture & Food
Dept. of Finance – Shared Services (OSS)
Dept. of Human Services
Diamond Offshore Company
E*TRADE Financial Corp.
Easter Seals UCP NC
Empirix
Equinix
Ergotron
Extendicare Health Services, Inc.
Ferring Pharmaceuticals SA
Financial Management Authority
Forsythe Technology
Garlock Sealing Technologies
Garmin International
Gaylord Bros., Inc.
General Dynamics Land Systems
Georg Fischer Central Plastics LLC
Golden Living
Government of Ontario
Government of Saskatchewan
GreatBatch, Ltd.
Hampton City Schools
Hazelden
HJ Baker and Bro.
Hologic, Inc.
Horton Holding Inc.
International Flow Services LP
iRobot Corporation
Iron Mountain
Johnson & Wales University
Johnson Controls - Building Efficiency
KABA Australia Pty Ltd.
Keste
Knape & Vogt
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NetApp Inc.
New York Blower
Newpark Resources, Inc.
NOW Health Group, Inc.
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Oregon Health & Science University
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PL Developments
Pregis Corporation
Premio Foods, Inc.
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Province of Prince Edward Island
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Rand Corporation
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Saab Sensis Corporation
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State Revenue Office Victoria
Stratus Technologies
Stuller, Inc.
Subaru of America Inc.
SunTrust Bank
Swinburne University of Technology
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Textron
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ThermoFisher Scientific
Towers Watson
Transport Canada
UniSource Energy Corp.
United States Distilled Products
University of Adelaide
University of Alabama at Birmingham (UAB)
University of Pennsylvania
Virginia Department of Motor Vehicles
Weber Packaging Solutions, Inc.
Welch's
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World Wide Technology
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Zebra Technologies Corp.

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Syntel Inc.

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Associated Materials Inc.
Avon Products Co., Ltd. Japan
Ball Corporation
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CDM Smith Inc.
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Loudoun County Government
LPL Financial
Manitowoc Company
Misumi Group Inc.
National Express
NEC IT Solutions Australia Pty Ltd.
NetSpend
Oxfam America
Pace Suburban Bus
Panaya Inc. Japan Office
Paramount Consulting Group
Q and A Corporation
QOL. Co., Ltd.
Quantum Corporation
Reliant Medical Group
Rentrak Corporation
Rexel Holdings USA
Riken Technos Corporation
Risingsun Planning Co., Ltd.
Safelite Group Inc.
Schenker AG
SNC-Lavalin, Inc.
Spyglass Corporate Services Group
Stemilt Growers LLC
SunGard Institutional Brokerage Inc.
Taiyo Yuden Co., Ltd.
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Yale University

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(Co-Presented by PittOAUG and the OAUG Upgrade SIG)

Enterprise Performance Management/Business Intelligence
Boston, Massachusetts
(Co-Presented by NEOAUG and the OAUG Hyperion and OBI SIGs)

Oracle Projects/ Oracle Primavera
Washington, D.C.
(Co-Presented by DC-OAUG and the Oracle Primavera SIG)

More details will be coming soon, and can be found at connectionpoint.oaug.org.
Questions?
Contact James Hobbs at jhobbs@oaug.com

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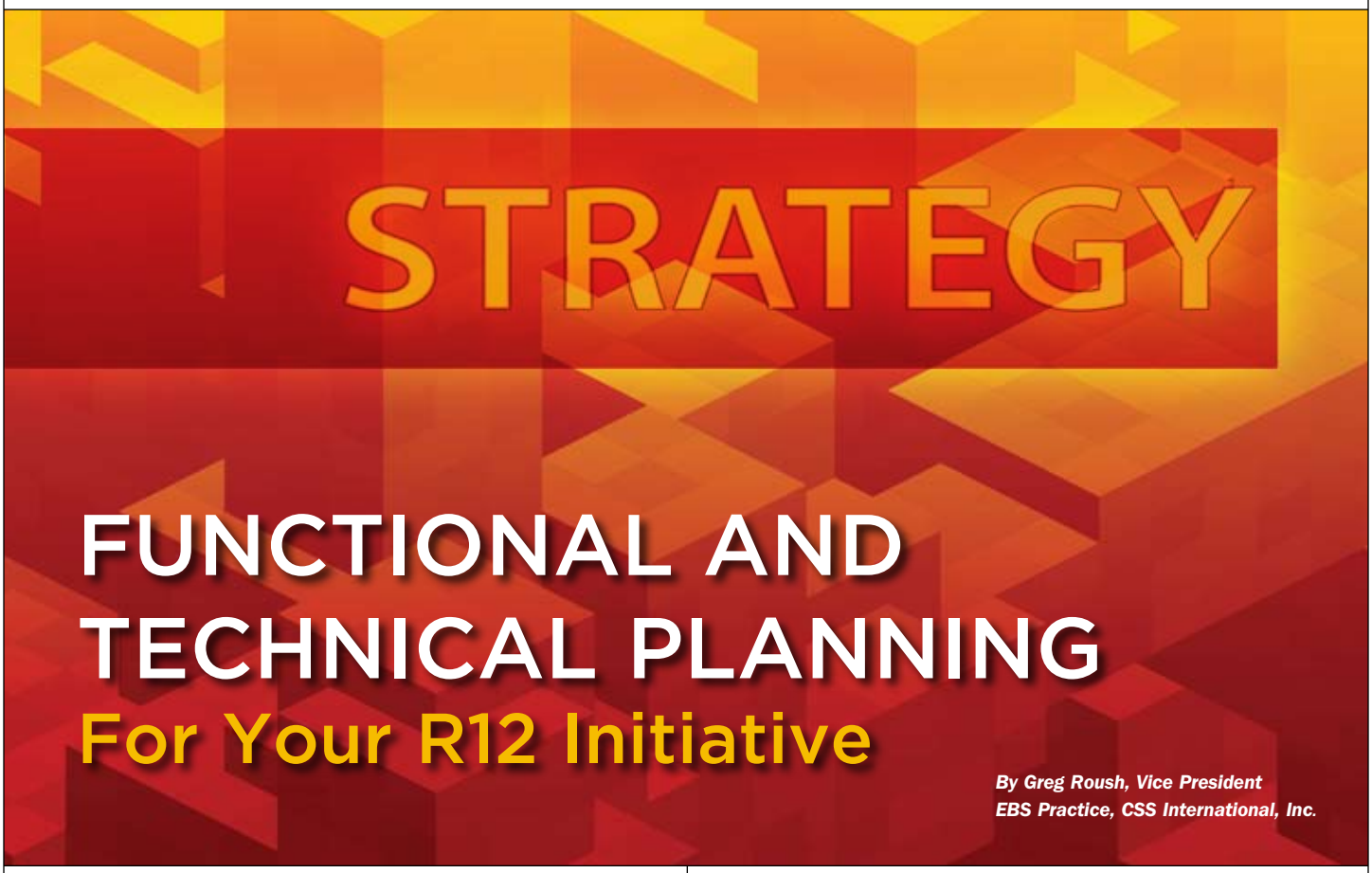

FUNCTIONAL AND TECHNICAL PLANNING

For Your R12 Initiative

By Greg Roush, Vice President
EBS Practice, CSS International, Inc.

CSS International, Inc. is a 2012 OAUG Star Partner

Oracle E-Business Suite (EBS) R12 initiatives have created quite a stir in the end-user community. Much is now understood regarding functional improvements associated with the release, including major design changes in Financials.

EDITOR'S NOTE: The Vendor Corner section of *OAUG Insight* provides information on products from OAUG vendor members. The OAUG does not specifically endorse any product or service from any of our vendor members.

As a Platinum Partner within the Oracle community, CSS has been helping Oracle EBS users plan and implement R12 upgrades and migrations for many years. We have helped our clients see benefits from the R12 functional solution; we've also helped them derive improvements in less talked-about areas, such as hardware and technical environment. It is highly recommended that an R12 project initiative consider functional alignment, technical stabilization and environment modernization as levers of opportunity in the project planning process.

Functional alignment begins with understanding the R12 solution footprint's relevance to you. With R12's greater than 2500 functional improvements and new modules, an upgrade plan should start with narrowing the entire portfolio of enhancements to a select group of opportunities that apply to your business requirements. Module additions, such as Advanced Collections, may warrant review for clients with a large customer base and complex collections requirements that need system-orchestrated steps. Advanced Collections functionality may not be as impactful for those clients whose collections activities are less complex and are successfully supported by dunning statements available in the Accounts Receivable module. For each project, CSS creates an inventory of opportunities in a value matrix that targets business benefit by business area and module; it articulates any quantifiable or qualitative opportunities that can be pursued. These opportunities become the foundation for project goals alignment that can drive the project leadership team.

Another key step in the R12 planning process focuses on stabilizing the technical objects delivered in a current state footprint. Built over time, these technical objects address important business requirements but may now be obsoleted through enhancements coming via the R12 standard footprint. New tools are available to extract code and complete code analysis within a 48 hour time period. Such tools allow clients to see where their custom objects are distributed. Impacts are understood by capturing usage data to address how often custom objects are in use and reviewing SQL level impacts of code such as table name changes. Oracle continues to improve integration opportunities for third-party applications by releasing improvements to the Services Gateway. Planning for the R12 upgrade should include evaluating integration strategy and assessing integration approaches that may be consolidated into a reusable service oriented model.

Many Oracle end users may experience instance proliferation over the years on Oracle EBS. The R12 project is a good time to revisit instance strategy and define an approach for R12 Gold, PROD, TEST, PATCH and DEV environments that can stabilize your solution. It is not unusual to see environments that are out of sync on patch levels or are shared for dual purpose, such as sharing DEV and TEST. These scenarios can create quality risks for PROD and can delay the delivery of needed functional releases. The R12 project creates an opportunity to start fresh on new hardware with instances that are in sync and serve specific purposes for the enterprise.

> ***Modernization of the technical architecture should be on every R12 upgrade plan.***

Modernization of the technical architecture should be on every R12 upgrade plan. Starting with an evaluation of their future state footprint, clients can seek out capacity planning support during the sizing process and position themselves for growth on their technical platform. Oracle runs well on Linux OS and also provides Virtual Server solutions, which can reduce hardware investments without reducing capacity to support user requirements. When planning for the upgrade, strategies for hardware should include VM evaluation that doesn't lean toward the minimum technical requirement. Under-sizing development machines could impede project delivery and reduce the value of performance comparisons before moving solutions to PROD.

For your R12 upgrade, contact CSS to be your trusted partner on your E-Business R12 Upgrade journey.

Greg Roush, Vice President EBS Practice, CSS International, Inc., Greg_roush@cssus.com

ORACLE

Three Keys to Project Management

By Susan Poser, Oracle

What can organizations with world-class project management teach the rest of us?

Executives go through various processes to determine which projects to fund internally and which opportunities to engage in externally. For instance, a high-technology company may develop a new product or build a new facility internally, and may provide installation services externally. Once these decisions are made, managing the execution by tracking the schedule, costs, resources and milestones is critical to ensure project success.

> ***"Customer satisfaction is a key differentiator, so the ability to execute with more precision can translate to a happy customer and repeat business."***

Many managers have the additional complexity of overseeing a supply chain to ensure that equipment, material and resources are available on time at the point of need and use. The question is, how can they integrate their portfolio and project management processes in order to manage projects profitably – and ensure business value?

Managing visibility in three important areas of your portfolio and project management processes will help ensure success:

1. Project/Portfolio Prioritization

Are you working on the most-profitable projects? Leaders of best-in-class companies can prioritize projects based on a set of predefined criteria – such as revenue, return on investment, importance to future strategic needs, alignment to core business and risks. For external projects, that may mean ranking each by priority to help determine the proper pricing schedule for the work. For internal projects, priority ranking can determine whether it makes sense to fund the project and the appropriate resources to commit to the work. Comprehensive portfolio management tools can help prioritize and align the project portfolio to ensure that limited resources are deployed for maximum impact.

2. Project Execution

How well can you track project progress, resource utilization and project milestone success? Executives at world-class companies have full visibility into the supply of parts, equipment and labor. If there is a disruption in the supply chain that affects the delivery of parts or equipment, they can simulate alternative plans, understand the impact and prioritize their options within

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hours. The improved visibility enables smart managers to make quick decisions on how to allocate limited parts to the right projects in the portfolio, minimizing cost and maximizing revenue.

3. Project Closeout

How quickly is your billing department notified when work is completed so revenue can be booked? With the proliferation of mobile and tablet technology, staff at cutting-edge companies can leverage mobile technology to capture accurate project-completion or parts-delivered data in real time. That data can then be automatically transmitted throughout the enterprise – keeping critical enterprise data off error-prone, paper-based processes that can take much longer to resolve. Real-time, mobile data transfer and automation will not only increase the accuracy of revenue recognition but will also support better coordination of resources, cost reduction and more-efficient access to working capital. Customer satisfaction is a key differentiator, so the ability to execute with more precision can translate to a happy customer and repeat business.

With portfolio and project management increasing in complexity and contributing more to revenue, business leaders should consider approaches to automate processes, integrate portfolio and project management, and employ best-practice processes. The impact will not only create a more comprehensive and integrated view of projects; it will also provide complete visibility and improved profitability.

Susan Poser is senior director of the Industry Strategy and Insight global program office at Oracle.

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