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## TRANSFORMING OUR PERFORMANCE ON THE JOB



**Kathleen Fauerbach**  
OATUG President  
kfauerbach@oatug.org

*“It is a big year for EBS users, and one in which we simply cannot sit back and relax. We must move forward, and when it comes to being on the job, we need to be prepared with insight, answers and vetted results.”*

Many of us entered this year with an extra measure of excitement. There was just something special in the air as we entered the new decade, wasn't there? For me, some of that excitement came from two opportunities: stepping into the role of OATUG President and welcoming COLLABORATE 20 attendees back to Las Vegas.

After so much transformation within our OATUG organization last year – new name, new look, new website, new ways to connect – I would like to think we can slow down for a minute. But as most of us know from working with technology, that is never the case. We need to anticipate and be ready for the next “adventure.”

It is a big year for EBS users, and one in which we simply cannot sit back and relax. We must move forward, and when it comes to being on the job, we need to be prepared with insight, answers and vetted results. Our leaders on the job are looking to us to be the leaders in our field to take our organizations further.

As Oracle sunsets its premier support for 12.1.3, is your roadmap laid out for an upgrade to 12.2.x? Will you be going further to a fusion or cloud migration? If you are already on 12.2, what lessons did you learn along the way that can help others move smoothly through this process? What did you wish you knew then that you know now? Are you willing to share your story?

If you are at COLLABORATE 20, you are going to see a lot of information prepping you for this on the job transformation. Not going to be there? OATUG has plenty of ways we can help you connect. You will read about some of them in this issue.

And don't forget, we developed The Hub just for you, our online community where we can “collaborate” year-round.

It is this larger community connecting one another, both online and at events, no matter where we are on our journey, that inspired me to become a volunteer with OATUG, and, eventually, what brought me to this role as our president.

We have so much in store for you at the conference! Of course, we'll bring the high quality education and stellar networking opportunities OATUG is known for, and we also have several new things this year: our new Ignite sessions were designed to pack a lot of punch in packaged, consolidated presentations; new attendee “journeys” can help you navigate the best sessions and networking events based on your goals; and Oracle Customer Advisory Board (CAB) sessions come to COLLABORATE for the first time and are open to all our attendees – a truly unique opportunity.

As we progress through the year, we will have more in store for you in our education department – all with the end goal of growing you professionally and transforming your path to grow on the job.

I hope to see you at COLLABORATE 20 in April to experience all the new opportunities for you and your team!

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Contact me at [kfauerbach@oatug.org](mailto:kfauerbach@oatug.org)

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# IMPLEMENTING LEAN MANUFACTURING

IN A HIGH-MIX PRODUCTION ENVIRONMENT USING ORACLE ERP

BY DHANESH THATIKONDA  
SPRINT TELECOMMUNICATIONS

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THE IMPLEMENTATION OF LEAN MANUFACTURING PRINCIPLES FOR HIGH-MIX PRODUCTION CONDITIONS REQUIRES CERTAIN MODIFICATIONS. THIS ARTICLE FOCUSES ON AN ASSEMBLY DEPARTMENT REORGANIZATION BASED ON THE LEAN APPROACH.

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# IMPLEMENTING LEAN MANUFACTURING

IN A HIGH-MIX PRODUCTION  
ENVIRONMENT USING ORACLE ERP

BY DHANESH THATIKONDA,  
SPRINT TELECOMMUNICATIONS

The lean manufacturing concept is well suited in the context of the traditional low-mix / high-volume production environment. Nowadays, however, enterprises face the challenge of a high variety of products along with dynamically changing demand.

Lean tools and methods known from repetitive production do not always fit today's high-mix environment, which presents challenges in designing one-piece-flow production cells and material flow based on the pull system.

There are numerous case studies proving outstanding benefits from the implementation of lean principles in low-mix / high-volume production environments. Lean tool application for high-mix production conditions requires certain modifications. This article presents a case study of implementing lean concepts in an enterprise producing a high mix of products.

## Introduction

The chosen enterprise for this case study is a leader in the gaming industry that is producing the most innovative and engaging cabinets. The production is configure-to-order, and demand is irregular. Finished goods have more than 30 percent uncommon parts. This article focuses on the assembly department reorganization based on the lean approach.

The value stream mapping tool was used to elaborate the current and future state value stream map, which estimated the potential influence of the planned assembly system reorganization on the rest of the production operations and identified the improvement areas. Based on the future state map, the goal for the assembly system reorganization was defined to increase productivity by 20 percent with the same resources.

Assembly operators' work content contained a significant amount of non-value-adding activities, such as waiting for parts, reaching for parts and tools, and moving within the workplace. Eliminating non-value-adding steps from work content was needed to achieve the goal of the project. To fulfill that, the following lean tools were applied:

- One-piece-flow to reduce the work in progress (WIP) level and shorten lead time (see Figure 1).

- Standardized work to reduce the variability of assembly cycle time for a given product type.
- Proper material presentation at the workplace to reduce reaching for parts and unnecessary movement of operators.
- Milk run material delivery system to reduce the level of inventories at the workplaces and prevent operators from leaving workplaces to bring the parts.
- Hybrid replenishment system and manufacturing supermarkets to reduce shortages of parts for assembly.

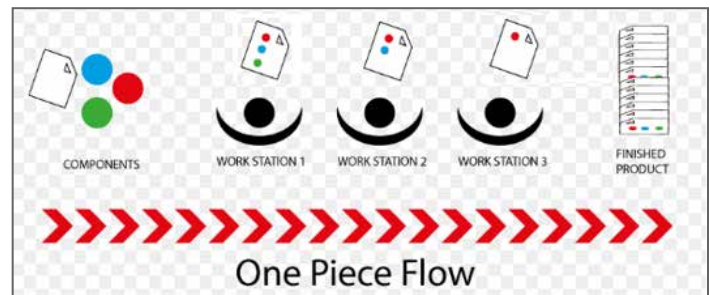


Figure 1. One-piece-flow reduces the work in progress (WIP) level and shortens lead time.

## Implementing One-Piece-Flow and Flexible Material Presentation

A workplace in high-mix production has different component types stored around a workstation. Operators spend a significant amount of their time bringing parts from the storeroom to the workplaces, searching for materials and reaching for parts and tools.

Organizing the assembly system in assembly cells reduced transport activity as well as any interruption of material continuous flow. Assembly equipment and personnel are arranged in a process sequence and include all the operations and components necessary to complete a product or a major assembly sequence. Operators perform operations and transfer all parts associated with one-piece-flow to the next cell with improved safety and reduced effort.

All components and materials are properly presented to assembly operators and delivered on time and directly to operators' fingertips. To do that, the containers with parts and assemblies are placed on flow racks in point of use within the assembly cell. All parts and assemblies are available for operators without any unnecessary movement and reaching. However, to reach this goal in a high-mix production performed on one versatile assembly cell was a real challenge. In our case study, special analyses were performed and a suitable flow rack was designed where all parts are in the best ergonomic location for operators. Because of many different

product types produced on the workstation, it was necessary for parts to be delivered to the flow rack in kits prepared for one or two hours of production and placed in dedicated slides on the rack. The rack can hold the material for three hours of production. Color coded bins for parts facilitates the delivery process managed by material handlers.

## Standardized Work

The standardized work instruction defines in detail all work elements performed by an operator on the assembly station and has usually a graphical, very visual form (see Figure 2.) A challenge here was to prepare such an instruction for the high-mix production workstation despite all of the different product types and assembly processes.

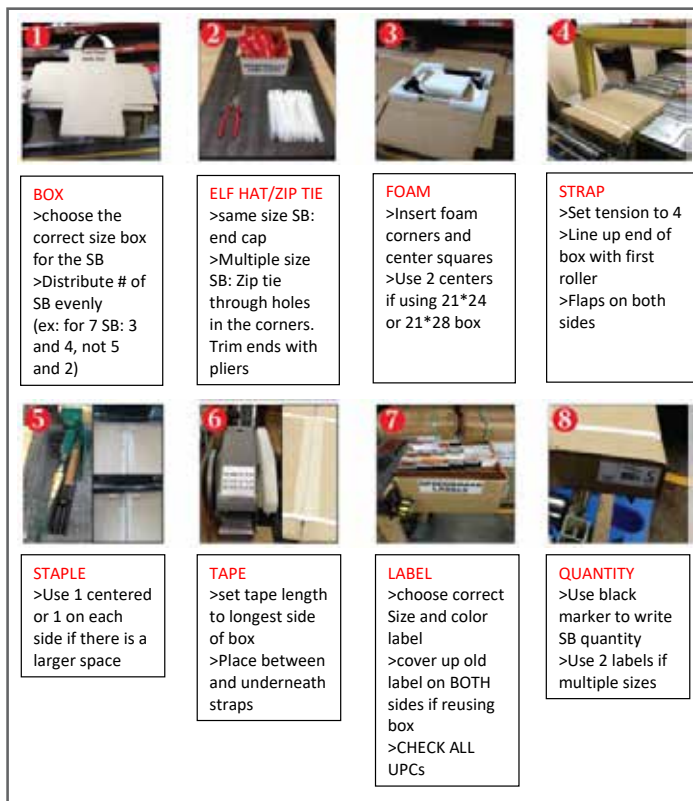


Figure 2. The standardized work instruction defines in detail all work elements performed by operator on assembly station.

To create such a standardized work instruction, all types of assembly processes performed on assembly stations were caught on video tape and analyzed. The analysis showed that only 40 percent of all operations performed by assembly operators were value-adding operations. The goal here was to define a detailed assembly procedure including only the necessary steps to produce one selected product. The effect of those analyses were 25 standardized work instruction cards for 30 different product types assembled on the designed workcell. Their implementation produced a 10 percent

improvement on product quality.

## Milk-Run Deliveries

A material handler regularly moves along the standardized route (a milk-run route) and picks components from the supermarket required for one-piece production (see Figure 3). The material handler then delivers components from the supermarket to the rack at the first assembly cell on the production line. Operators perform the necessary operations and move in process assembly along with the rack to the next assembly cell. Component picks from supermarkets are streamlined with proper pick sequencing and single-direction movement. Milk-run deliveries are an efficient method to keep inventories on the shop floor at a very low level and to increase material handler productivity.

This scheme works perfectly for repetitive production, where the same types of components are used for longer periods. For the high-mix production environment, kanban cards cannot be used to provide material handlers with the information about what components need to be delivered to the workcells during the next milk-run. To resolve this problem, the final product kanban cards were implemented instead of components kanban cards.

During each milk-run, the material handler delivers components to the workcells for two hours of production and takes the final product kanban cards for the next two hours from the scheduling board. The material handler provides these cards to the component supermarket. The product kanban card holds information about the whole set of components required to assemble the final product. After implementing the milk-run delivery system, the level of inventories on the shop floor was reduced to two hours and the space required for production was reduced by approximately 50 percent.

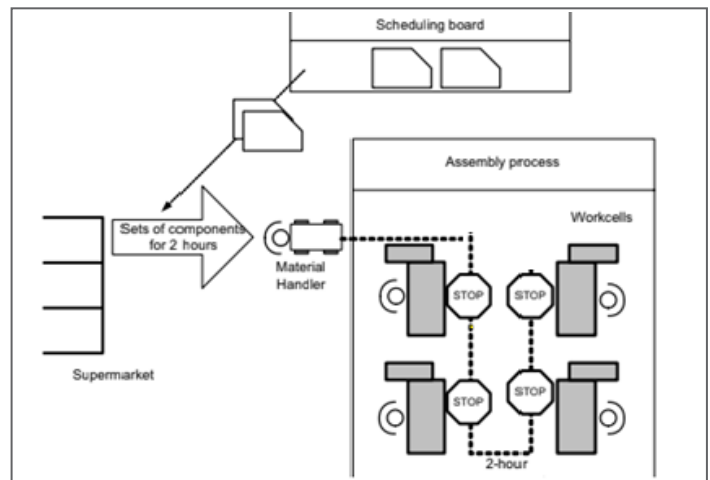


Figure 3. Milk-run deliveries keep inventories on the shop floor and increase material handler productivity.

## Replenishment System

The pull system was identified as a crucial tool to decrease the level of inventories and improve the availability of the components for assembly (see Figure 4). This is true for repeatable production with limited product variants. The pull system was inefficient for the high-mix environment as demand was not stable and a high variety of components was demanded by the assembly process. To find a proper solution, the components were divided into three categories:

**High runners:** Components for products ordered by most of the customers in large volumes. The consumption by assembly department is repeatable.

**Medium runners:** Components for products often ordered by the customers. The average daily consumption is lower than for high runners.

**Low runners:** Components ordered rarely or in very low volumes as part of bigger orders for high and medium runners.

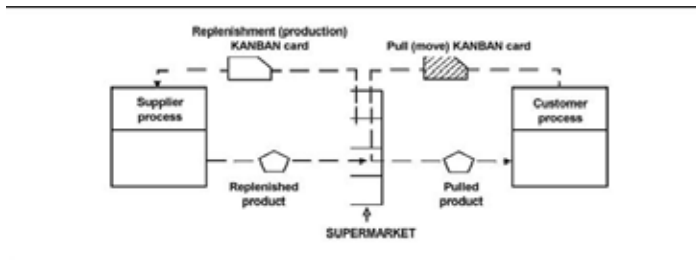


Figure 4. The pull system is a crucial tool to decrease the level of inventories and improve the availability of components for assembly.

The pull system is used for high runners. The supermarket holds these components in predefined quantities.

A hybrid supermarket replenishment model using the push system is ideal for holding components only for the current day's production for medium and low runners. A nightly replenishment job creates tasks to replenish the supermarket from bulk inventory for medium and low runners. The push replenishment program replenishes supermarket based on the next day's production schedule. The hybrid replenishment program is like the Oracle Push replenishment program for sales orders where you have tasks to pull material from bulk inventory (see Figure 5).

### Push replenishment process:

1. Planners run the push replenishment program for next day production.
2. Push replenishment program creates consolidated demand for all the medium and low runners. It then creates supply from Bulk inventory to fulfill the demand. Consolidated Move Orders are created and an attempt is made to allocate all the move order lines.
3. Planner then logs into Custom production schedule page built on the results of move Order detailing. This page lists the shortages and associated Work order for each demand line. Planners reschedule few work orders to reduce shortages for next day production.
4. Planners re-run the push replenishment job to account for work order reschedules. Old Move orders are deleted and new move orders for replenishment are created. Planners look at the shortages and release tasks for replenishing the Supermarkets.

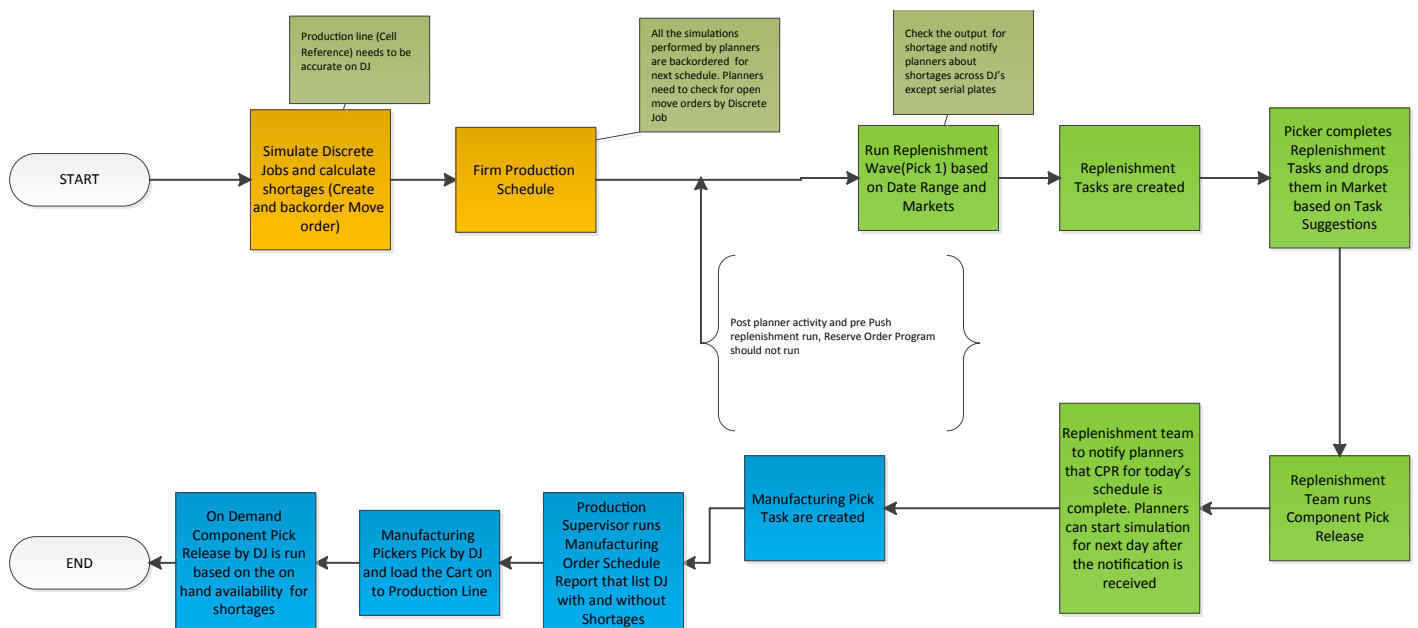


Figure 5. Push replenishment

5. Material handlers perform the tasks and move the material from bulk to Supermarket.
6. Replenishment team on day of production runs Component Pick release. This job creates tasks to pick material from supermarket and load on to flow racks.
7. All Work orders with any existing shortages are displayed on dashboards for Water Spider (specialized material handler) to pick and load the flow rack.
8. Water Spider logs into MSCA which is customized to allow scan of work order for component picks. Only tasks for a single work order to allow single piece flow are shown to the Water Spider. On the last pick associated to the work order, a custom message saying, "All tasks associated to the work order are picked" is displayed. On seeing the message, the picker loads the flow rack on to the conveyor belt and performs drop all LPN in MSCA application.
9. Cross docking allows any supply for shortages is directly sent to supermarkets to fulfill current production demand.
10. Operators at each assembly line pick material from flow rack and manually issue material to the work order. Items that are serial tagged require scanning of serial number at the time of WIP consumption.
11. Progress of Work order picks and production is frequently reported back to the dashboards.



## Key Oracle EBS R12 Functionalities Employed

- **Serial Tagging:** Serial tagging enabled us to assign and track serial numbers when issuing and receiving material at the organization level. This feature provided us the flexibility to treat serialized items like non-serialized items and saved a lot of scanning time during replenishing supermarkets.
- **WMS Rules Engine:** Rules engine provided a repository for restrictions and business policies related to the warehouse. We could define and implement rules, directly from standard Oracle Applications forms, without having to write custom code. Rules engine was extensively used for directed picking and put away for all the warehouse activities.
- **Material Status:** A material status is a combination of transactions and planning actions that you choose to disallow in a circumstance. Material status is used to restrict sales order transaction type from considering supermarket inventory. Supermarket inventory is dedicated for manufacturing work orders.
- **INV\_REPLENISH\_DETAIL\_PUB API:** This API is extensively used in the project to create and allocate move orders for replenishing supermarkets

## Conclusion

The lean concept can be applied successfully in high-mix production environments. However, the lean management tools must be modified on the level of technical solution for high-mix constraints. The proposed lean tools such as flexible parts presentation, milk-run deliveries and the hybrid replenishment system allow for improving the productivity of the assembly department. This approach can be extended for multiple production lines with multiple supermarkets, all sourced from single or multiple bulk inventories. In our case study, the overall total savings were about \$400K per quarter by resource / inventory stock. ♦



*Dhanesh Thatikonda is a senior solution architect at Sprint Telecommunications. He designs solutions for complex business requirements using industry standard practices. He has presented his solutions at several education and training events.*



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# *MIGRATING* **SINGLE FORM PERSONALIZATION**

BY SANTHOSH KUMAR KHAMMAMPATI  
SHERWIN-WILLIAMS

FNDLOAD (UNIX command) Form Personalization has a provision ONLY to migrate a complete set of personalizations associated with a Form/Function. This limits developers to migrate one of the personalizations associated with a Form/Function.

As of today, we are using manual migration, which involves huge manual efforts for implementation projects multiplied with the number of instances to be migrated. This article provides detailed steps to overcome this limitation and migrate one of the personalizations of a Form/Function.

### Main Features of the Solution:

- Multiple developers can work on the same Oracle form for personalization without dependencies.
- Form Personalization migration to the next instance will be independent and can be migrated in any sequence.
- OVERWRITE\_FLAG - will eliminate the risk of overwriting an existing personalization in the target instance.

### Migration Steps:

Extended “affrmcus.lct” to Download and Upload specific (one) personalization of a Form.

“xxcust\_affrmcus.lct” is the new custom (XXCUST) LCT file. The commands explain the detailed steps for Download and Upload.

#### Upload, Download Commands:

```
FNDLOAD apps/<apps> 0 Y DOWNLOAD
  $XXCUST_TOP/patch/xxcust_affrmcus.lct <xxcust_ldtfile.ldt>
FND_FORM_CUSTOM_RULES
form_name="<form_name>" SEQUENCE=<seq>
```

```
FNDLOAD apps/<apps> 0 Y UPLOAD $XXCUST_TOP/patch/xxcust_
affrmcus.lct
<xxcust_ldtfile.ldt> F_OVERWRITE_FLAG="Y"
```

### 1) Download

Parameter F\_OVERWRITE\_FLAG have options Y/N. Y indicates that the personalization exists in the destination instance and needs to update (overwrite). N indicates a NEW personalization.

```
FNDLOAD apps/<apps> 0 Y DOWNLOAD
$XXCUST_TOP/patch/xxcust_affrmcus.lct
XXCUST_GMEBDTED_seq10_05.ldt FND_FORM_CUSTOM_RULES
form_name="GMEBDTED" SEQUENCE=10.05
```

### 2) Upload

Use the downloaded LDT file and upload in target (destination) instance using below command.

```
FNDLOAD apps/<apps> 0 Y UPLOAD
$XXCUST_TOP/patch/xxcust_affrmcus.lct
XXCUST_GMEBDTED_seq10_05.ldt F_OVERWRITE_FLAG="Y"
```

### Technical Components:

Seeded code affrmcus.lct is extended to attain this functionality. xxcust\_affrmcus.lct is the updated code version.

### Conclusion:

If there is no XXCUST\_TOP, you can use any TOP/patch. For example: GL\_TOP/patch.ss.

### References:

affrmcus.lct – seeded file is available in this path:

\$FND\_TOP/patch/115/import/affrmcus.lct ♦



*Santhosh Kumar Khammampati is a lead IT architect at the Sherwin-Williams Company with more than 13 years of experience in Oracle on-prem and cloud applications. He is a technical expert with a proven track record of thinking strategically and analytically while also fostering strong relationships with clients and stakeholders. Santhosh is a hands-on collaborator with excellent problem-solving skills and a talent for developing and mentoring teams to deliver optimal results in highly ambiguous, rapidly changing environments.*



# PROTECT YOUR INVESTMENT

BY MODERNIZING YOUR  
ORACLE FORMS WITH APEX

BY MONTY LATIOLAIS, INSUM

Over the last thirty years, Oracle Forms has proven to be a stable, reliable platform, and in that time, companies have built large applications consisting of hundreds if not thousands of individual forms. Now, with customers demanding a modern, updated web experience, the sheer size of these legacy Forms applications makes that extremely challenging.

Enter Oracle Application Express (APEX). Now, you can eliminate pain points and seamlessly extend your existing Forms by adding key business processes or task flows written in Oracle APEX.

## Strengths and Weaknesses of Oracle Forms

One of the main strengths of Oracle Forms is that it is fully supported and continually developed by Oracle (version 12.1.4 released in September 2019). In the hands of a trained and experienced user, productivity is unmatched. Forms applications are robust and reliable.

Conversely, Oracle Forms are intricate environments where integration with other systems can be complex. Forms applications are unable to take full advantage of differing screen sizes. Moreover, these days, many experienced developers in charge of Forms and Reports applications are approaching retirement. Finding and training their replacements is literally a race against time with most young developers much more interested in delivering modern, web-based solutions. It can also be time-consuming and expensive to train end users on these legacy systems.

## Reasons to Modernize

As your business changes over time, business applications must keep pace. Several factors can contribute to these new business requirements:

- Merger or acquisition.
- Applications requiring access by external customers or partners.
- Applications needing to work on tablets and smartphones.
- Desire to match a corporate-wide style standard.

You have choices when it comes to Forms Modernization. These can differ greatly in terms of technology, functionality and ease of development. Your IT team may or may not be comfortable with them. So why not consider a technology that enables you to reuse a large percentage of your existing investment, leveraging skills you already likely have in-house? Oracle's own Rapid Application Development platform, APEX, is such a technology.

*“Why not consider a technology that enables you to reuse a large percentage of your existing investment, leveraging skills you already likely have in-house?”*

## Oracle APEX: What is it? Why use it?

APEX is a web application development platform you already own. It can be used to generate functioning applications with very little coding, resulting in unequalled ROI for your business. It will allow your developers to build robust, complex and highly scalable applications, fast.

Oracle APEX isn't a third-party solution. It is a web application development framework built right into your Oracle Database. It is already covered under your Oracle Database license, and you get to use it, free. Your developers access and work with it through their web browser. There's no expensive client software to install.

This astonishing 100 percent Oracle product “pre-packages” many of the tasks in the development process that would come at the cost of weeks or months of manual coding. Application requirements such as security, authentication, access control and user management are taken care of behind the scenes. This means your developers can focus on your business requirements and the business problem at hand, without getting hung up on implementation details. Consequently, software application proofs-of-concept are dramatically accelerated, and production times are reduced.

## Benefits

- APEX applications look great on a desktop browser, tablet or smartphone, out of the box.
- APEX includes dozens of productivity and sample applications, fully supported by Oracle, and ready to use.
- APEX is the most productive way to extend Oracle Forms in a certified and supported fashion.
- APEX is included in the Oracle Database you already own. There are no additional licensing costs based on the number of developers, applications or end users.

Your Oracle developers will most likely feel perfectly at home with it. Its main programming language is Oracle PL/SQL. This eliminates the need for new software and greatly reduces the need for additional developer training. APEX also exposes the world of web services in a declarative way, harnessing the power of thousands of existing service-based processes and data. It can quickly and easily replace Excel spreadsheets, providing truly secure and centralized data with powerful reporting capabilities.

Oracle APEX scales effortlessly and can meet your business needs on all levels. From simple, single workstation-based applications, to enterprise-wide, server-based, multi-site solutions, APEX provides your users with a stable, ergonomic and extendable workspace. Furthermore, all APEX-built applications are cloud-ready.

Lately, Oracle APEX has been in the news, having been singled out in Gartner’s peer insights customers’ choice award. Gartner Peer Insights is Gartner’s enterprise IT product and service review platform. It hosts over 285,000 verified customer reviews across 430 defined markets. It recognizes the vendors that are the most highly rated by their customers.

Among Gartner Peer Insights’ Best Enterprise Low-Code Application Platforms of 2019 as reviewed by customers, Oracle APEX obtained an overall rating of 4.7 out of 5, accompanied by glowing reviews. This recognition demonstrates that Oracle APEX is **aligned with enterprises’ needs, and suitable in just about any industry.**



## Key Considerations When Looking to Modernize

One shouldn’t take a “one size fits all” approach to Forms Modernization. Your unique business realities will determine where you end up on the following spectrum



### Do Nothing

Remain 100 percent on Oracle Forms and rely on Oracle continuing to enhance and support the platform. Oracle Forms might still be perfectly suited to your business needs, or you may not have the budget at this time to even consider a modernization project.

### Forms Conversion

This approach has the advantage of allowing you great freedom to improve your business processes while keeping your data and desired functionalities intact.

You can take the opportunity to modernize business processes and not just screens. New APEX applications can look and behave in a much more user-friendly way, with the same business logic behind them. You want to design a modern Web app and not bend to the old app style.

New apps should be modern and intuitive, not mimic Forms. A correlation between screens is not always convenient for the end user. During a Forms conversion, one Forms screen might be split into many APEX pages, or the opposite, when many Forms screens might be merged into a single APEX page.

The result should provide the task-based flow and features that everyone expects from a browser-based experience. Don’t systematically try to replicate the look-and-feel or the navigation from the legacy Forms application.

This approach can often be the most expensive in terms of both time and money.

### Forms/APEX Blended Solution

There is a third approach. A blended solution combining Forms and APEX allows you to effortlessly switch between APEX and those modules that have not yet been converted. This may be the most desirable due to time or budget constraints.

Also, not every form is a candidate for migration. For example, some forms may only be used sparingly and do not warrant the investment.

A Blended Modernization effort can start off small, with a modest budget and timetable, and then be expanded from there. Proceed by segments or modules, identifying a functional area to complete. Starting with a proof of concept is a great idea.

## Conclusion

So, why start from scratch with new technology when you can use a large percentage of your existing investment? The answer is...you shouldn’t. APEX allows you to run in the same database, leveraging your existing business logic, developer skill set and, best of all, with no additional licensing costs.



Monty Latiolais has over 30 years’ experience in information technology with more than 20 years’ experience in Oracle Database development. Monty remains a strong and active supporter of the Oracle user group community He is currently serving as director of business development with Insum, the largest APEX consultancy in North America.

Prior to joining Insum, Monty spent time solving IT challenges in the oil and gas, legal and health care industries.

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**5**

**DAYS FOR YOU TO COME TOGETHER WITH YOUR PEERS TO SHARE IDEAS AND LESSONS LEARNED**

**13**

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Reception

**TUESDAY, APRIL 21**

10:30 a.m. - 4 p.m.

5 p.m. - 7 p.m. - Happy Hour

**WEDNESDAY, APRIL 22**

11 a.m. - 3 p.m.

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- Oracle Support Sessions

And new this year OATUG and Oracle are teaming up to host Oracle EBS Open CAB Day! You'll hear from members of the Oracle EBS development team throughout the week; then as COLLABORATE draws to a close, they want to hear from you in this open-to-all Customer Advisory Board event. Session options include:

- EBS Order Management and Logistics
- EBS Manufacturing, In-Memory and Adaptive Intelligence Applications
- EBS Procurement, Projects and Lease Accounting
- EBS Enterprise Command Centers (ECC)
- EBS Technology On-Premises and on Oracle Cloud

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ORACLE

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After a tour of the venue, we'll give you the inside scoop on everything from the mobile app to exclusive OATUG programs. Orientation is also a great way to make friends early!

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# BUILDING A NARRATIVE REPORT

WITHOUT ERROR-  
PRONE PROCESSES

BY JAY CHAPMAN, SIERRA-CEDAR, INC.

Remember the old phrase from the Schoolhouse Rock intro, “Knowledge is Power?” Today, for both shareholders and stakeholders, having the proper knowledge of an organization’s activities goes beyond static financial reports and statements.

Non-financial information that provides analysis and connects financial data with other relevant information, such as strategic objectives or sustainability information, is just as important in helping shareholders and stakeholders make key decisions regarding an organization. As such, narrative reports, such as annual reports, budget books and even comprehensive financial annual reports, are an important business endeavor because they provide a holistic perspective that includes intangibles that can lead to some great competitive advantages.

Furthermore, over the past 15 years, results of mandates from governments and regulators have led to an increase in more specific and detailed narrative disclosures. In fact, by 2006, Deloitte found that narrative content made up over 52 percent of an annual report.

## Narrative Reporting Challenges

While it is clear that narrative content is an important component of narrative reports, creating an integrated report with narrative and data within a collaborative process remains an error-prone and ad-hoc process. For example, let’s say that you are using Microsoft Word to build your organization’s narrative report, and all of your data is in a Microsoft Excel document. The only way to bring that data into Word is to copy and paste. But what if the data that you just pasted changes and you pasted that data in several places throughout the Word document? Now you must either re-copy and re-paste the new data or change each instance within the Word document!

*“While it is clear that narrative content is an important component of narrative reports, creating an integrated report with narrative and data within a collaborative process remains an error-prone and ad-hoc process.”*

Another challenge is integrating subject matter experts (SME) into the process. How do they provide their information? Who keeps track of which SME is responsible for a particular area of content? And once the owner of the

master document receives the content, how do they integrate it into the report? Is the formatting the same? What if a formula gets changed and the data changes?

If you have experienced these challenges, then chances are you are spending more time than is needed on building a narrative report. Thankfully, Oracle has a tool that can meet these challenges, and then some!

## The Solution: Oracle’s Narrative Reporting

Narrative Reporting is a part of Oracle’s EPM Cloud offering and allows users to work collaboratively in a centralized and secure environment. Users can manage the full life cycle of a report or report package, which includes adding authors, creating detailed formatting and style guides, managing a review cycle, and publishing.

With Narrative Reporting, the days of having to copy and paste data from disparate documents are over because users can source data from the Cloud or from an Excel document that is linked to the report package. Furthermore, users can create management reports to use in the report package, and Narrative Reporting has Disclosure Management where users can create regulatory reports.

*“With Narrative Reporting, the days of having to copy and paste data from disparate documents are over because users can source data from the Cloud or from an Excel document that is linked to the report package.”*

## Features

Here are a few of the features in Narrative Reporting:

### Accessing Data

Narrative Reporting allows users to quickly integrate with Oracle and non-Oracle sources, meaning you can combine data from any source into your reporting. For example, users can create financial and managerial reports by sourcing charts and grids from the EPM Cloud (for example, Planning or Financial Consolidation Close Cloud), Essbase sources (on-prem or in the Cloud) and ERP sources like Fusion Cloud.

You can also keep your data in an Excel file and upload the document into the Cloud to use as a reference doclet. By accessing data directly from your source of record means that if your data was to change, every instance of the data in your management report or report package would change automatically!

### Report Package Development

Narrative Reporting utilizes Microsoft Office to create content such as narrative pieces, charts, grids and reports. Within the solution, users can use content management where they can check-in and check-out their work. There is also version control and history, so users always know which doclet is the latest and greatest.

Users can also utilize embedded content, which leverages Excel's named ranges to provide centrally controlled and reusable content as well as variables that can control common dates, text and data.

### Collaboration and Workflow

Report package development in Narrative Reporting can occur during three development phases:

1. Authoring.
2. Review.
3. Sign Off.

#### Authoring

Content is created during the Author phase, and approvers review and edit the content. SMEs can provide content during this phase with ease by accessing the report center to download their doclet, or they can use Smart View.

#### Review

In the Review phase, reviewers provide feedback, ask questions and recommend changes through threaded commentary.

#### Sign Off

Finally, the Sign Off phase enables users to finalize their report content and get sign off from key stakeholders from a computer, tablet or smartphone!

During any of these phases, Narrative Reporting notifies users when tasks are due and when important reporting deadlines need to be met.

### Publishing and Delivery

When the report package is complete, it is easy to download the finished report in Word or PowerPoint (depending on the type of report package) or PDF. Users can also distribute the report package to stakeholders at any point in the report development. You can send the entire report or a limited subset of the report content based on the definitions you

set. The recipients of the distribution can view the report content sent to them, even if they are not participating in the report development process.

### Regulatory Reporting

As mentioned before, Narrative Reporting allows users to manage and design XBRL taxonomies. Utilizing Microsoft Office, users can perform XBRL tagging and easily produce XBRL audit reports. Taxonomy schema rules and calculations validate XBRL tagging by checking data accuracy and compliance. EPRCS also uses regulatory-specific validation for SEC EDGAR Filer Manual rules IFRS Global Filing Manual.

You can publish reports in multiple regulatory formats, including:

- XBRL
- SEC EDGAR HTML
- PDF

### Conclusion

Whether your organization generates reports with narrative, or you are finding the best ways to include more narrative components, don't settle for error-prone and ad-hoc processes. Narrative Reporting provides the tools necessary to integrate narrative with data that you can trust. ♦

*“Narrative Reporting provides the tools necessary to integrate narrative with data that you can trust.”*



Jay Chapman is a consultant with Sierra-Cedar and has more than 15 years of experience working with tools that include Hyperion, PeopleSoft and Oracle's Enterprise Performance Management Cloud, which includes Planning, Narrative Reporting and Oracle Analytics Cloud.

# ORACLE'S IDEA LABS



## SOCIAL NETWORKING MEETS CUSTOMER ENHANCEMENT REQUESTS

BY DAVID WRIGHT, MORE4APPS



At More4Apps, we've been busy designing and developing a new suite of spreadsheet-based integration tools for ERP Cloud customers. It's certainly a different world from Oracle E-Business Suite (EBS). One welcome change is Oracle's Idea Labs. If you're already on Cloud ERP or moving to Cloud ERP, you'll really appreciate this great new service.

The Oracle Idea Labs were created to provide more of a social media slant for getting ideas reviewed and evaluated by both customers and Oracle Development. In the Idea Labs, you can post ideas for features you'd like to see and collaborate with other customers on features they're interested in.

All ideas posted are reviewed by the Oracle Product and Development teams. In some cases, they are able to confirm that the feature already exists within the product. In others, they will suggest workarounds if there are alternative ways to solve the problem.

From a customer's point of view, the Idea Labs are a great place to contribute ideas and receive feedback from other customers as well as from Oracle.

Ideas, feedback and conclusions are visible to all users of the Idea Labs, providing real benefits of collaborative communication between supplier, customer and business partners like us at More4Apps.

### The Ins and Outs of Posting Ideas

If you are on Oracle ERP Cloud or a member of the Oracle Partner Network, then you automatically have the necessary credentials to access and search for ideas or post your own ideas.

To use the Idea Labs, you must first identify the correct functional area. Most of the time, you'll know exactly where to post your request, but there are some crossover areas of functionality. Don't stress if you get it wrong; the folks at Oracle are really good at re-assigning posts to the correct area in order to give your ideas the best visibility.

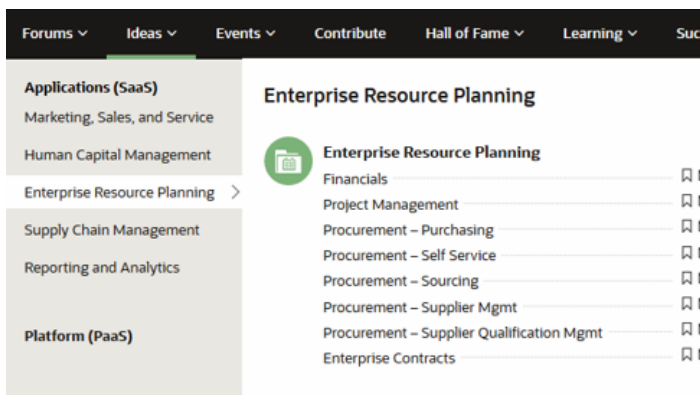


Figure 1

Select your functional area to get started (see Figure 1).

Once you have identified the functional area, perform a search to see if your idea already exists (see Figure 2). I really like this feature, as it saves a lot of unnecessary noise and helps to reduce the chances of duplicate idea postings. I highly recommend avoiding posting an idea for a duplicate issue, as this has the potential to reduce the level of engagement for a particular idea.

If you do find an existing idea that lines up with what you require, support it by commenting on and voting for the idea. Providing more details, like a brief business use case and the benefit from the idea, etc., improves the chances of an idea getting through. An enhancement is less likely to eventuate if just one or two people have voted for it.



Figure 2

In case you find duplicate ideas, just add a comment to one of them and reference the other – that way the team at Oracle can work through removing the duplicate.

If you log an idea, this is where the fun begins! Usually you'll get a comment from someone at Oracle, and usually in a timely manner. From personal experience, they will let you know if there's a solution, if it's already on their development path, if it's a bug or if it's a genuine new idea.

I find this is a nice way to short-cut the support process and get answers to issues sooner rather than later.

### Where's the Line Between an Idea and a Bug?

This is where things get a little tricky. I'm actually not too sure on the ins and outs of how moderators decide what is a support issue vs. an idea. And if anything, this is really the only area where I have criticism of how the Idea Labs work. From my point of view, an idea is just that: an idea for new functionality or an enhancement to a piece of current functionality. However, I've found that I've created SRs where Oracle is agreeing that it is a bug, but they still push for it to go on the Idea Lab. It seems as if the support analyst's key aim is to resolve the SR by converting it to an Idea.

I have an example where a moderator suggested the issue was a bug and recommended an SR, only to find Support had recommended an idea for the issue.

Even if it ends up as an enhancement SR, there is a link back to the Idea Lab. I do believe this is an area that needs some

work – really tightening down what is an idea is vs. a bug. But don't let this concern diminish what I believe is in general a great service from Oracle.

### Idea Review and Consideration

Oracle takes notice of the top-ranking ideas, so if you see something that you would really love to have, then make sure you “like” that idea. The higher the number of votes, the higher the chances of Oracle doing something about it. Of course, they can't run development based entirely on the popularity of an idea, but they certainly take it into account. This is something I'm really impressed with. Oracle didn't pay me to say this, but it works; you actually feel listened to!

Oracle provides a diagram to detail the lifecycle of the ideas process (see Figure 3):

If your idea is declined, there is a very good reason for this. If you disagree, you can debate your point with an Oracle analyst. I recommend connecting directly with the analyst to gain more insight on where they are coming from. Yes, you can send direct messages to people outside of the forum. Doing this stops talk-back, radio-like banter and is a cleaner way to work through the issue.

Oracle has the following statuses for the Idea Rankings:

STATUS	DEFINITIONS
Under Oracle Review	The idea is under consideration by Oracle.
More Information Requested	This idea requires more information.
Planned	The idea is approved to be included in a future release.
Delivered	The idea has been added to the product.
Current Capability	The idea is already in the product.
Duplicate	This idea has already been submitted.
Declined	The idea will not be considered at this time.
Archived	The idea has been moved into an archive forum for historical reference.

Keep an eye on where things are, and ask for feedback if your idea is “Planned” or “Under Oracle Review.”

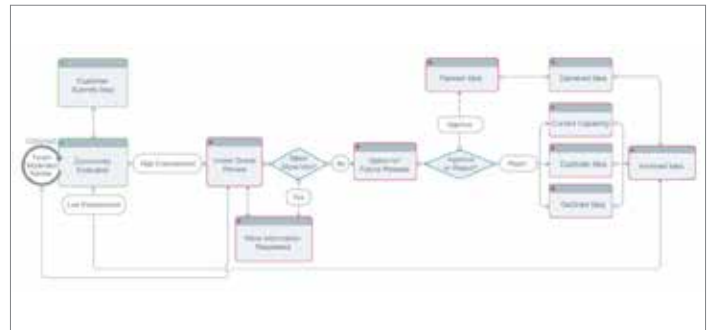


Figure 3

### In Conclusion

Oracle has come a long way. I still remember the “old days” when dealing with Oracle Support. Back in the 90's, there were modems, VT Terminals and fax machines at the ready to help customers out. It was very much a hands-on process where everything went to Support and customers hoped and prayed there was a solution or a way of getting what they needed into their beloved character mode v9 or v10 of what was then Oracle Applications.

I like the fact they question ideas and really home in on the business case for the idea to better understand the required functionality. The timeliness of answers and engagement is great too.

Now this may sound like a bit of marketing speak; however, I can attest to Oracle really working hard to meet this vision through the Idea Labs. I've found they are working hard to achieve this vision.

#### WHAT ORACLE SAYS ABOUT THE IDEA LABS:

“Your feedback and participation guide us in finding, evolving, and prioritizing the ideas that provide you with the greatest benefits. We're here, listening to your ideas for making our cloud-based service better!”

The Ideas Lab has really helped us at More4Apps as we develop new products for ERP Cloud.

I find the Idea Labs the best way to engage with the Oracle ERP Cloud team. Take a look yourself. You'll see what I mean.



David Wright is the product champion lead and shareholder at More4Apps. More4Apps develops automation and integration solutions that enable Oracle EBS users to easily upload and download their Oracle data via APIs and interfaces. <https://more4apps.com>

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# ORACLE iSUPPLIER PORTAL

BY TIFFANY PALLME, AMEREN

## Oracle defines iSupplier Portal as the enterprise application that structures all supplier communication through a secure Internet-based portal.

Phone calls, faxes and emails with suppliers waste time, introduce errors and create latency in a supply chain. Oracle iSupplier Portal enables suppliers to become more efficient. Suppliers access the latest customer information, including purchase orders and payment status. The rich, two-way collaboration enables suppliers to submit change requests, payments and profile data, thus helping their customers gain better service, reduce processing costs and get relief from costly supplier inquiries. The bottom line is that your buying organization has time to focus on what really matters – getting more savings.

Ameren is based in St Louis, Missouri. We are among the nation's largest investor-owned electric and gas utilities. We provide electric and gas services in a two-state area and are the largest electric utility in Missouri and the second largest electric utility in Illinois.

Ameren was created in 1997 with the merger of Union Electric Company and Central Illinois Public Service Company. In 2003, we acquired Central Illinois Light Company. In 2004, we acquired Illinois Power Company. In 2010, Ameren realigned its two-state territories into two companies: Ameren Missouri and Ameren Illinois. Ameren is on Oracle E-Business Suite (EBS) version 12.1.3 and planning an upgrade to the cloud in 2022.

### Efficiencies for Suppliers and Customers

There are many benefits to using iSupplier Portal for both your suppliers and your company. The biggest benefit is that iSupplier Portal provides a central location for all purchase order information and it provides suppliers 24x7 access to purchase orders and invoices, including historical information. It can also improve efficiency by decreasing the number of calls between suppliers and your internal supply chain personnel. It reduces paperwork, eliminates fax and email communication methods, eliminates mail float (because when invoices are entered online, Ameren receives them immediately), reduces invoice administrative costs (paper invoice and mail costs) and enhances the visibility of transactions between Ameren and its suppliers.

The iSupplier Portal increases on-time payment by using web invoicing, which reduces the time suppliers spend tracking down delayed or held payments. Suppliers receive an email notification of pending orders, giving them inbox



functionality to help them manage their orders from Ameren and the ability to submit change requests for price, quantity and need-by date.

### Implementation Challenges

Through Ameren's course of implementing iSupplier Portal, several challenges were encountered. Most have been solved. Several of them have been shared with Oracle's Customer Advisory Board (CAB). Several are ongoing.

One of the challenges we faced was that suppliers' access to the portal timed out when updating non-global blanket purchase agreement (BPA) line pricing. The solution we implemented was to extend the time limit from 30 minutes to 60 minutes, which gave the user enough time to input new prices without getting kicked out.

Another challenge we faced was that in the Oracle EBS 12.0.6 version, suppliers had trouble understanding the remit-to section in R12 due to it not being auto populated like it was in 11i. The supplier needs to search for their remit-to and select it instead. The solution we used for this issue was a customization to auto populate the remit-to address as it was in 11i.

Another challenge we faced is inactive contacts referenced on open purchase orders causing issues with change requests. To resolve this, we run an inactive contact report every Monday, and then our clerks remove them from our open purchase orders.

The last challenge we faced was that you can only have one company per email address; duplicates are not allowed. This is not friendly for manufacturers' reps or companies with multiple subsidiaries, and it causes a lot of extra email addresses to maintain. Our solution was to create parent/child relationships between the companies so that the parent company can see all the child companies' POs and then enter invoices for the child corporations.

Ameren had two issues that we presented at the Oracle Customer Advisory Board:

- The first issue cannot be resolved because we customized the section to have validations. Our customization made it impossible to change an invoice once it has been submitted. Accounts payable must delete the invoice, then the supplier re-invoices.
- The second issue is still being reviewed by Oracle. This is related to email notifications going to everyone registered under the suppliers' name; you can't just direct an email to a specific person.

The last challenges that we face are ongoing:

- Suppliers with non-global BPAs containing more than 1,000 lines cannot view all lines within the portal. Suppliers also are unable to import non-global BPA price changes.
- Supplier acquisitions, mergers and technical incompetence.
- Maintaining the Contact Directory and keeping it up to date.

## Ameren's Story

Ameren's objectives for implementing iSupplier Portal were to eliminate the purchase order challenges we were experiencing, such as:

- Purchase orders not being communicated properly and PO attachments not being sent with the purchase order.
- Buyer confusion on when to communicate purchase orders via fax or email, i.e., text or file attachments.
- Postal mail delays.
- Manual buyer updates on expired stock BPA pricing.

Ameren's efforts to implement iSupplier Portal started in 2007. Initially, we registered 400 suppliers on the portal. The suppliers were mainly EDI and XML suppliers that we did business with on another hub. As part of the approach, we allowed a subset of eleven stock non-global BPA suppliers to update their BPA line pricing through iSupplier Portal.

During 2008 and 2009, we were working through the learning curve in using the system. In 2010, another 436 suppliers were registered. Suppliers were selected by volume of invoices and acknowledgements. As part of this process, we sought input from accounts payable, strategic sourcing and the nuclear business lines.

In 2011, another 730 suppliers were registered. This included the remaining suppliers with whom we had Global Contract Purchase Agreements and new suppliers set up by our accounts payable department.

Our last purposeful phase was in 2012 when we initiated a fax-to-email conversion. In this phase, we converted over 6,300 suppliers from a fax communication to an email communication method. We also identified over 900 suppliers to inactivate due to inactivity. Since 2012, we've implemented an initiative to register all new suppliers on iSupplier Portal.

## Where We Are Today

Thanks to the hard work and great effort by all involved, today we have over 5,000 active suppliers with over 9,300 registered users on the iSupplier Portal. We plan to ensure future success by continually communicating and training our suppliers to acknowledge and invoice our purchase orders; update pricing on our stock non-global BPA lines (potentially 30,000 lines); submit change requests to our PO for pricing, quantity and need-by-date changes; and update their own supplier information.

At Ameren, we strive to have continuous improvement. By doing so we have applied features within iSupplier Portal for new uses. In 2016, Ameren decided to utilize the security within the login process to bring in a Quality Management System section that enables suppliers to respond to quality issues that have been reported by our business lines. Initially, we set up 104 companies to receive notifications of incidents and respond via their i-Supplier Portal access. This has been expanded within the last year to 250 companies in total.

Many of our companies represent several suppliers. So, we are using the parent/child relationship within Oracle to allow one supplier user account access to view multiple other suppliers' information using one login.

In conclusion, Ameren is very proud to have empowered our suppliers to track and manage their purchase orders, invoices and more through Ameren's Oracle iSupplier Portal and encourage you to work with your suppliers to empower them to do the same.



*Tiffany Pallme is a supply chain analyst and Oracle trainer at Ameren. In 2008, she started at Ameren and led the iSupplier Portal initiative to set up all suppliers on the portal. In August 2016, she took on the role of Oracle Trainer. Tiffany also provides tactical and strategic directional support for the day-to-day operations, maintenance and utilization of supply services systems and processes within Ameren Supply Services.*



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## 5 TOP CHALLENGES FOR IT DEPARTMENTS USING ORACLE E-BUSINESS SUITE

JOHN O'KEEFFE, CEO, MORE4APPS



After over 20 years spent working alongside Oracle E-Business Suite (EBS) users, More4Apps' CEO John O'Keeffe reveals the five most pressing challenges facing IT leaders using the on-premises Oracle ERP system:

### 1) Scarcity of skilled resources

As Oracle EBS matures, many of the people skilled in operating it are approaching retirement or retraining in newer technologies. These skills have been developed over multiple implementations over the last 25 years (and longer). The newer entrants to the workforce bring skills in newer technologies, and those that ARE still available command premium prices. All these contribute to pushing IT costs high and presenting a real risk to the business.

### 2) Increasing downward pressure on IT operating budgets

Businesses are increasingly asked to show savings in operational areas, and IT is no exception. This, coupled with the first point above, leaves IT leaders in Oracle EBS businesses being squeezed.

### 3) Data residing in spreadsheets vs. central systems

This is one of the most significant concerns expected from the implementation of a large ERP system. It will also have been in multiple presentations to C-level managers – the necessity for a single source of the truth. Once the implementation is completed, the user community often turns to spreadsheets when they find a task they want to resolve.

### 4) Data processing tasks being allocated to IT personnel

When speaking with More4Apps customers, the most pressing concern from IT managers is that their teams are inundated with data processing requests from other business units. When custom code or scripts are used to load data, responsibility for the data often flows onto the IT department. As well, the data owners may resent the length of time required to deliver what they may consider to be simple uploads or updates.

### 5) Data bottlenecks affecting overall production

In large organizations with significant amounts of transactional data, bottlenecks in data processing can severely impact the productivity of the organization and limit the benefits from the powerful Oracle E-Business Suite.

One of our customers issued stock to a process, which worked well, using a bill of materials. Once the process was complete, the unused items would be returned to stores. The return to stock became a risky bottleneck, with stock left on tables to be returned when the staff had time. This process was time consuming, and not having items in the stock inventory was a cost to the business. This left two options, hire more staff or build a custom solution. Refer back to 1 and 2: availability of trained staff.

Faced with these situations, an IT leader is faced with three options:

- Prioritize tasks and decide which ones simply don't get done.
- Move tasks out of the IT department's remit.
  - This will involve hiring staff or outsourcing to a lower cost economy. Both of the options carry an overhead.
- Seek out cost-effective technology solutions, which must neither compromise the integrity of the ERP nor incur excessive time or cost to implement.



# VENDOR CORNER

The third option should therefore suggest a third-party software solution, such as those developed by More4Apps. Such a solution will allow users to integrate their familiar Excel spreadsheet with the Oracle ERP. This is a two-direction interface and thus data remains stored in Oracle ERP. Existing users have the knowledge and skills to use Excel to configure these loaders. Implementation is quick and easy – simply install the tools and start testing.

In point 5, I gave an example of stock returns. Using More4Apps' Materials Wizard a user can download the stock issue, and remove the items used. After counting the items on the table, they would then run the return-to-stock load and process it from a single spreadsheet. This is only a small example of how one organization used the More4Apps set of tools. As they reflected on what they achieved, they reported that these tools had paid for themselves in three months, and in just 1 year they had used them for so much more. (And as an aside, I'm proud to say, after 10 years this organization is still a customer.)

*More4Apps is a longstanding Gold Partner with Oracle and a 5-Star Partner with OATUG. They'll be exhibiting and presenting at [COLLABORATE 20](#) in Las Vegas. More4Apps' range of Wizards for EBS is proven among over 35,000 users in 38 countries and is about to be complemented by a new set of tools for Oracle's cloud ERP.*



## Better together

For over 20 years, **More4apps** has delivered significant savings for organizations using **Oracle E-Business Suite**.

By enabling the use of Excel as the interface with Oracle, data entry can be streamlined across myriad business processes.

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We Will See You Through

**O2Works** has nearly 20 years of history in putting Oracle to work for your Organizations around the globe - on time and within budget. We have the knowledge to be your trusted consulting partner. Our team includes some of the first consultants to work with the Oracle E-Business Suite from some of the first versions of the product release in the late 1980s.

Our teams include project managers, developer analysts, functional subject matter experts, and DBA/Sysadmins. We deliver the full spectrum of talent required to implement, upgrade and maintain the applications. Our extremely low turnover of U.S. based consultants further enables our focus on long term consultative relationships.

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# GEO-SIG NEWS



## GEO AND SIG MEMBERS CONVERGE AT COLLABORATE

OATUG special interest groups (SIGs) and local/regional groups (Geos) offer great ways to connect with other Oracle users and experts year-round through in-person and online events. Those opportunities are magnified, though, when thousands of Geo and SIG members converge at [COLLABORATE](#). Whether you're already involved or have just been considering it, these events at COLLABORATE would be a terrific way to see what these groups have to offer!

\*Dates subject to change. Check the [conference app](#) for the latest dates and times!

### SUNDAY, APRIL 19

- Build-a-Bike: An OATUG Geo Networking & Community Service Event
- Process Manufacturing SIG – Learn and Share Best Practices – On Premise and to the Cloud
- OATUG Cloud ERP Finance SIG Session
- Welcome to the OATUG Cost Management SIG
- Learn and Discuss Best Practices to Manage EBS 12.2 Tech Stack at the EBS Apps Tech Stack SIG
- APEX In EBS SIG: Panel on how Clients use APEX for Their EBS Environments
- Mentoring with OATUG Emerging Leaders
- Emerging Leaders Reception

### MONDAY, APRIL 20

- Learn to Innovate Using Oracle Cloud Platform at the OATUG Fusion Middleware SIG
- Optimizing the E-Business Suite Database 19c Upgrade at the Database SIG
- Learn and Discuss Best Practices for EBS Upgrades at the EBS Upgrade SIG
- Gather Useful Tips and Best Practices at the Accounts Receivable, Credit and Collections SIG

Review a complete list of Geographic and Special Interest Groups at [oatug.org/geosigs/geosigs](http://oatug.org/geosigs/geosigs)



**JOHN RILEY**

*Geo Committee Chair*



**JAMES LIU**

*SIG Committee Co-Chair*



**KABERI NAYAK**

*SIG Committee Co-Chair*

### GEOGRAPHIC USER GROUPS

Geographic User Group (Geos) participants reside within a defined region and meet to facilitate discussion among local Oracle Applications and Technology users.

### SPECIAL INTEREST GROUPS

Special Interest Group (SIG) members share a common interest or shared industry concerning specific Oracle products. Participants may meet virtually or in person during OATUG conferences.

- Tax SIG: How Will Global Tax Changes from the Last Year Affect You?
- Your Shortcut to Support: On-Premise and Cloud Oracle E-Business Suite Functional Analyzers - SIG
- Multi-National SIG Group
- The Truth About Oracle Analytics: The Analytics SIG Board & Customer Panel Tells It Like It Is
- Learn Existing Updates and Roadmap at Configurator SIG

## TUESDAY, APRIL 21

- Atlanta Geo – Cloud Conversations – Strategy, Progress, Readiness & Reality
- EBS on Oracle Cloud Infrastructure SIG - Panel Discussion on the Multiple Options for E-Business Suite Customers to Use EBS on OCI
- OATUG Oracle Projects SIG Update
- Analytics, BI & Big Data SIG Meeting: Customer Case Studies & Oracle Updates!
- OEM vs OMC Oracle Enterprise Manager and Management Cloud: Where Do We Go From Here? (EM4APPS SIG)
- GL SIG - Hierarchy and MDM Challenges in a Multi-Environment Scenario
- Learn and Discuss Best Practices at the Desktop Integrator (ADI) SIG
- OATUG: E-Business Suite Security SIG - Your Attack-Surface Footprint (On-Premise & Cloud Security)
- Learn how to Start Your Journey to a Mobile Enterprise at the Mobile Apps for Enterprises SIG
- Find Your Answers at the OATUG EBS SysAdmin SIG
- Sales Performance Management SIG: Business/Functional and Technical OIC/FIC Module Overview Plus Lessons Learned
- Lessons Learned and Best Practices for EBS 12.1.x to 12.2.x Upgrade (Government Contractors SIG)
- A Public Sector Perspective of Migration to Cloud for Public Sector SIG
- Peeking into the Clouds to Understand the Future of Supply Chain at the Value Chain Planning SIG
- Oracle CPQ Cloud SIG Meeting: Product Update and Roadmap of Oracle's Sales Transformation Product
- Emerging Technologies SIG Group - How Our Jobs Will Change
- Analytics, BI, Big Data and EPM/Hyperion Reception

## WEDNESDAY, APRIL 22

- Learn and Discuss New Opportunities at the Advanced Pricing and Order Management SIG
- Migrating CEMLI from On-Premise to Cloud Services? If so, Don't Miss the C&A SIG!
- Asset SIG
- User Mgmt/RBAC SIG: User Mgmt Part III - Automate User Creation and Role Assignments
- Database Options for Running the E-Business Suite: OATUG Database SIG
- Scaling E-Business Suite 12.2: OATUG Advanced Architecture and High Availability SIG
- The Governance, Risk and Compliance SIG – Data Protection and Application Migration in 2020

OATUG Geos and SIGs are a great way to expand your network, deepen your learning and get more actively engaged with the Oracle users and partners you align with best. We encourage you to get involved today! ♦



Need more information about your OATUG membership or how to find answers here? Contact [membership@oatug.org](mailto:membership@oatug.org) or call +1.404.240-0897.

## MEMBERS GET MORE CONNECTIONS, SAVINGS AND LEARNING!

Through the Oracle Applications & Technology Users Group (OATUG), thousands of Oracle users and expert consultants share best practices and learn from each other. OATUG members gain insights to help avoid costly mistakes, ideas to increase efficiency and knowledge to extend the life of your software investment.



### MEMBERS CONNECT MORE

[The Hub](#) online discussion forum connects OATUG members with real solutions in real time. When you have a question about a process or product and need a quick answer, why not post in The Hub? Plus, you can read hundreds of questions that have already been answered.

[The Partner Marketplace](#) connects you with vendors that can help you implement, solve problems and gain efficiencies with your Oracle Applications and Technology. And, OATUG [Geographic and Special Interest Groups](#) help you connect locally or with others who share your interests.

### MEMBERS SAVE MORE

Corporate membership in OATUG delivers year-round savings for everyone in the organization with free [educational resources](#) and unlimited access to knowledge and solutions that save time and money.

OATUG members save \$400 per person on [COLLABORATE](#) registration and earn free certification testing this year! And save even more when you bring a team of four or more to COLLABORATE.

### MEMBERS LEARN MORE

OATUG members rely on [The Knowledge Base](#) to learn what's new, what's next and what's worked for others. Live and recorded [eLearning webinars](#) bring the experts directly to members' computers or phones.

And, you can stay up to date with in-depth articles in [OATUG Insight](#) magazine and the weekly [OATUG Insider](#) news brief. ♦



*“If you want to be an Oracle professional, you have to join OATUG, because it’s the one place you can get unbiased information.”*

–Chao Yee Watson , Program Manager, Xilinx

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## NEW BOARD MEMBER SNAPSHOT

**BILL DUNHAM****OATC****Principal**

An Oracle Application and Technology ACE, Bill's professional role revolves around Oracle and its applications and technology offerings. Over the past several years,

he has had the opportunity to get more engaged with cloud products from Oracle and other vendors.

Starting as an Oracle developer in the mid-80s, Bill's Oracle career grew over the next 25+ years to include roles such as Oracle DBA, functional/technical lead, program/project manager, program director and strategic trusted advisor. He actively led many Oracle EBS implementation and upgrade projects (12.2, amongst many releases), both on-premises and cloud projects. In addition, he has actively been involved with the integration of SaaS and Oracle EBS products. He is a member of the Oracle Applications and Applications Technology Customer Advisory Board (CAB); co-author of several Oracle EBS Application books and StreetSmarts series; and an avid OATUG promoter, supporter, presenter and attendee of COLLABORATE and Oracle OpenWorld events.

**Fun Facts**

- I have run several half-marathons and am training for my next this spring!
- I have six siblings. There are 2 girls and 5 boys in my family, and I am number 5 out of 7.
- I still play ice hockey at least once per week and hold my own for being one of the "old guys."
- As a young baseball player, I almost hit two cycles in one game. A cycle is hitting a single, double, triple and a home run in one game. I almost did it twice!

**As technologies change, Oracle users must evolve their knowledge and skill sets. How does OATUG help?**

There really is no better place to learn than from OATUG members' experiences. As businesses transform their enterprise applications, they must retool their IT team members' skills. Members can attend an OATUG event, whether it be a local Geo meeting, online e-learning SIG session or the annual COLLABORATE event, and they are pretty much guaranteed to learn something new or find a solution to their most critical business or technology issues.

**Why do you invest your personal time and energy in supporting the mission of OATUG?**

Being an Oracle applications and technology professional, there is no other organization to which I would rather devote my time and energy. I like to give back to the OATUG community what the community has given me, our team members and company. OATUG is the one and only professional association for Oracle applications, tools and technology. I enjoy giving back to OATUG in gratitude for everything I've learned and the connections I have made that have helped me to build a business and to advance my professional career.

**JAMES LUI****Metropolitan Water District of Southern California****Principal DBA Team Lead**

James has more than 25 years of experience with Oracle's E-Business Suite (EBS) and related technologies

in both technical and functional capacities and 10 years as a federal contracts administrator. He has supported several user groups in many capacities from board member, conference chair and speaker to his numerous roles with various Oracle conferences, Customer Advisory Boards and COLLABORATE.

James' many different roles, ranging from functional through deep-technical implementations and systems administration, allow the many points of view inclusive of different positions and roles to generate equilibrium in what are often challenging and dynamic times of technical change.

**Fun Fact**

If you Google me, most of the non-Oracle related hits are also directly relevant to me (acting, beekeeping, chickens, priesthood, etc.)

**What led you to your profession/field?**

I started as a technical documentation specialist, documenting the implementation of one of the first Oracle EBS Government (GEMMS) implementations. That required learning everything about everything in order to make sense of the policies, procedures and desktop work instructions. I shadowed a lot of different roles to collect data for the documentation, which led to learning best practices from many others.

### *Why do you invest your personal time and energy in supporting the mission of OATUG?*

Complex products, whether software or automobiles, mean ownership teaches ways to make the product work better, adapt to changes or do things in ways the manufacturer may not have envisioned, or need to work in ways the manufacturer isn't good at explaining. Getting customers together to share these kinds of insights and ideas has been around as long as we've known the first cliques and clubs. At our level of financial and resource investment, OATUG is the place where these exchanges happen about both the good and the not so good experiences we have.



#### **PAROMITA RAY**

#### **Georgetown University Director Student Information Systems**

Paromita joins the board with more than 20 years working with Oracle development tools/technologies with a consistent track record of

translating business needs into innovative and highly reliable solutions that scale technically and operationally.

Paromita is currently an active member of DC OATUG and serves in the role of secretary/website coordinator. She works at Georgetown University in DC as the director of student information systems. Her specialization includes strategic alignment and planning of IT projects, technology roadmaps, governance, architecture, systems analysis and design, information management, quality assurance, solution delivery and service management of an ERP system (Ellucian Banner for Higher Education).

#### **Fun Fact**

I have MAJOR motion sickness but love roller coasters and thrill rides!

#### **What advice would you offer to someone just getting involved with OATUG?**

Try to participate in as many of the events organized by OATUG and its various Geo and special interest groups (SIGs). These events provide a great platform for all to learn from the collective experiences of our members and also share your own. Volunteer your time toward the greater cause of OATUG – we can only become better through active involvement from members like you!

#### **What keeps our members up at night? How can OATUG help?**

If there is one certainty in technology, that's change. The pace at which technology is transforming businesses is scary great. "Great" because we are no longer just IT professionals; we have become business leaders who are transforming the way

humans are interacting with the world around them. "Scary" because with that comes huge responsibility. While we drive change, we have to ensure that business doesn't get negatively impacted by those changes. Through the immense collective knowledge base of OATUG, we can help manage risk along that transformation journey.

#### **OATUG BOARD OF DIRECTORS**

The Oracle Applications & Technology Users Group (OATUG) Board of Directors provides leadership, influence and guidance to drive and enhance the focus of OATUG. In following the mission of OATUG, the board works with the executive director to create a strategic plan for the year that supports the views of the members and works to enhance the capabilities of the organization.

#### **2020 OATUG BOARD OF DIRECTORS**

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#### **VISION AND MISSION**

##### **VISION**

To be the trusted, go-to source for education on Oracle applications and technology both on premise and in the cloud, for connecting and sharing members' experiences, and for influencing Oracle and partner solutions worldwide.

##### **MISSION**

The Oracle Applications & Technology Users Group (OATUG) is an independent, global, member-led organization that maximizes customers' investments in Oracle and Partner solutions.



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