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The OAUG Star Partner program gives Associate members a bundled approach to active, integrated participation in the OAUG community. The program combines membership, advertising and conference benefits into a value-priced package that delivers recognition, premium advertising opportunities and outstanding conference visibility.

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

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A Trusted Partnership Through Dialogue

Oracle President Mark Hurd visited the COLLABORATE 13 conference in April. During his keynote presentation, Hurd stated that Oracle wants to invest more time and energy into connecting with users groups.

Through increased involvement with its users groups, Oracle aims to inform and educate customers, secure customer feedback and, ultimately, advance customer success and satisfaction.

I believe Hurd’s very presence at COLLABORATE demonstrates Oracle’s commitment to these goals and its interest in advancing a strong partnership with users groups.

The OAUG has long been a channel through which members can have candid and productive communication with Oracle. This kind of open, two-way interaction can help everyone involved. Users have the opportunity to become more knowledgeable about using Oracle Applications while sharing their suggestions for product and service improvements. Oracle gains a better understanding of customers’ real-world use of its products along with insight into meeting customers’ future expectations.

As the two-way dialogue continues, there are a number of opportunities to connect with Oracle and join the ongoing discussion:

- Participate on an Oracle Customer Advisory Panel for a direct line into Oracle Development to help enhance products and set product direction.
- Schedule one-on-one meetings with Oracle executives and product experts during conferences throughout the year.
- Log in to live or recorded OAUG eLearning and Q&A sessions facilitated by Oracle executives and product managers.
- Attend product road map and strategy updates during conferences and regional events.
- Submit your ideas and concerns through advocacy groups like the OAUG Customer Support Council (support@oaug.com).
- Attend Geographic User Group (Geos) and Special Interest Group (SIG) meetings and webinars to hear Oracle speakers.
As the unified voice and advocate for users of Oracle Applications, the OAUG welcomes the opportunity to grow and evolve our partnership with Oracle. Over the coming months, we will keep you informed of opportunities for even more communication and influence with Oracle.

If you have an idea about other ways to foster the OAUG’s trusted partnership with Oracle, contact me at mwright@oaug.com to share your thoughts.

Regards,

Margaret Wright
Checking In for the Summer

It’s summer. It’s hot. It’s vacation time. It’s also a good time to catch up on some of the OAUG activities and resources you may not have had time for during the busy first part of the year.

**Attend an OAUG eLearning Session**

OAUG eLearning webinar presentations are convenient and free for OAUG members. New, live presentations are presented throughout the year. And recorded sessions make it easy to access great educational content any time.

**Peruse the OAUG Conference Paper Database**

This searchable archive of whitepapers and slide presentations was recently updated with content from more than 500 education sessions delivered during the COLLABORATE 13 conference. Plus, the database contains thousands of papers from past OAUG conferences. Visit the OAUG Conference Paper Database to search for specific topics or just to see what’s new.

**Attend OAUG Connection Point® – AppsTech**

This regional conference event is exclusively focused on Oracle E-Business Suite technical topics and hones in on the key technical aspects required to maintain the complex EBS software. Developed for DBA, SysAdmin and Developer professionals, OAUG Connection Point® – AppsTech brings together experts from the tech side of the house for targeted learning.

**Attend a Geo or SIG Meeting**

The OAUG’s Geographic (Geo) and Special Interest Groups (SIGs) are worldwide communities of Oracle users and consultants who volunteer their time, energy and knowledge to achieve common goals and objectives connected with specific geographic regions, industries or products/product lines. Face-to-face meetings and webinar presentations offer exceptional education and networking.

**Share Your Knowledge and Experience**

The OAUG Connection Point® – EPM/BI/ EBS 12.X call for presentations will open in summer 2013. Proposals related to implementing, supporting and maintaining Oracle E-Business Suite, Enterprise Performance Management and Business Intelligence systems are requested. Watch for the announcement of the opening of the call for papers, and submit your presentation proposal.

Visit oaug.org to locate details about the above items. Or contact membership@oaug.com or +1 404.240.0897, extension 2, for assistance.

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

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**Regard**,  

Steven R. Hughes  
OAUG Executive Director  
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Enjoying the carefree life as an Oracle Hyperion Planning administrator? It’s probably not as carefree as you would like with the many issues you face every day, such as those pesky end users or slow running calculations. Is there a way to make life better? Reduce maintenance? Improve performance? Have happy end users? Yes, and in this article you can gain insight into the daily life of a Hyperion Planning administrator and learn how to take advantage of tools and techniques to make your job a walk in the park.
Check the Automated Nightly Jobs

For a planning administrator, automating more tasks means less work, more consistent repeatable processes and happy end users. Many Hyperion Planning tasks can be automated, especially the critical ones that run at night, such as updates to dimensions, Planning application refreshes, data loads, calculations, backup and recovery, and more. These tasks can be automated by using batch scripts to run processes via tools like the Planning utilities and Essbase MaxL scripts. While Planning doesn’t have a built-in scheduler, you can create scripts that can be run by third-party schedulers.

Planning utilities are delivered with your installation of Hyperion Planning and provide a way to automate a number of daily tasks. You can find the Planning utilities in the products/Planning/bin folder of the HYPERION_HOME directory (specific file path may vary depending on the version installed). The utility file names generally describe the basic function of the utility. Some examples are CubeRefresh.cmd, ExportSecurity.cmd, HspUnlockApp.cmd, ImportSecurity.cmd, OutlineLoad.cmd, PasswordEncryption.cmd, ProvisionUsers.cmd and UpdateUsers.cmd.

To automate Planning utility jobs, use the password encryption utility (PasswordEncryption.cmd), which gives you the ability to suppress passwords when running other utilities in scripts. The password encryption utility creates a file that stores a password in encrypted form. Each password file contains only one password, so each password requires its own file. You choose the directory where the password file will be saved when you run the utility. Once you have created a password file, you can use -f as the first parameter when running other Planning utilities to specify the path and name of the appropriate password file. The utility will use the password from the file instead of prompting for a password (important so you don’t have to be there at 2 a.m. when the job runs).

One of the most used utilities is the Outline Load utility, introduced to Planning in version 11.1.1. You can use it to load metadata and data. Load .CSV metadata files in parent-child format directly into Planning. The Outline Load utility can update and build dimensions and outline components like Account, Period, Year, Scenario, Version, Currency, Entity, user-defined dimensions, attributes, UDAs, exchange rates, Smart Lists, Dates and Text measures. In 11.1.2.2, you can export metadata from a Hyperion Planning application and relational database imports and exports targeted for version 11.1.2.3.

The syntax and parameters for the Outline Load utility (Figure 1) are as follows:

```

Now that you’ve ensured successful nightly jobs, it is time for security maintenance.

Security Maintenance

Performing security maintenance for any system or application can be a daunting task. Thankfully for Hyperion Planning, the Shared Services interface is fairly simple to use for managing users and groups. Shared Services is part of the Foundation Services layer of the Oracle EPM System.
Components of Shared Services include:

- Core Services.
- User Provisioning.
- Enterprise Performance Management Architect.
- Life Cycle Management.

Core Services is known as the underlying “plumbing” for the Oracle EPM System: session management, authentication and authorization, repository services, and logging and usage.

User Provisioning allows you to maintain Oracle EPM System security for all Hyperion products. You create a user once in Shared Services (or reference a user from an externally authenticated system), assign the user to groups, assign the user to roles and assign application access. The interface for user provisioning is called the Shared Services Console. User provisioning provides single sign-on access across the Oracle EPM System/Hyperion products. Users can externally authenticate to LDAP, MSAD, NTLM or other third-party tools. User provisioning is bundled with a relational repository for native Shared Services users and groups.

The Shared Services CSS Import/Export utility is a command-line utility that enables you to export, import and validate user provisioning data in the native directory. This utility is part of Shared Services (not Planning). You can use the utility to create, modify and delete users, groups and roles that originate from the native user directory bundled with Shared Services, and you can modify relationship data for users/groups stored externally. You can export data from ALL directories, but you can only import data to the NATIVE directory.

You’ll most likely use the Planning Web user interface to maintain Planning application-specific security, though it is possible in Shared Services. Another option is to use Planning utilities to import and export Planning application-specific security. The Export Security utility (ExportSecurity.cmd) allows you to export user and group access permission settings in Planning for members, data forms and form folders, task lists, and Calculation Manager business rules and business rule folders. The access permission settings are exported to a text file (SecFile.txt), which can be used along with the import security utility to import the user and group access permissions.

The Import Security utility loads access permissions for users and groups from a text file. The utility imports security for members, data forms and form folders, task lists, and Calculation Manager business rules and business rule folders. Permissions are overwritten for existing security assignments, while all other existing permissions remain. You can clear existing access permissions with SL_CLEARALL parameter. All users, groups and objects must be defined in the application before running the Import utility.

The text file for security imports must be named “SecFile.txt” and must be placed in the HYPERION_HOME\Planning\Bin folder. You can use the SecFile.txt created with the Export Security utility as a starting point to update security across applications, or you can manually create the SecFile.txt file. Available delimiters for the SecFile.txt include comma, tab, semi-colon, pipe, colon and space. Comma is a default delimiter (Figure 2).

**Application Design**

Most Hyperion Planning administrators find they are never finished with application design. Once users realize the power of Hyperion Planning and Essbase, they either want to extend the current applications or create new...
ones. There are many things to consider when designing a Planning application.

**Number of Applications and Plan Types**

When determining how many applications are needed and how many plan types an application should have, some things to consider are the users and/or audience, security, dimensionality, down time and memory limitations. If the overall application requirements call for common dimensions, common security and a maintenance window (i.e., no 24/7 requirement), then a single application is the way to go. Maintaining a single application is generally much easier than maintaining multiple applications. However, security, dimensionality and downtime requirements can dictate the use of multiple applications.

Using multiple plan types within a single application is a design best practice, creating multiple plan types or Essbase databases for different subject areas (e.g., revenue planning, work force expense planning or cap ex planning). Benefits related to the use of multiple plan types include smaller databases, faster calculations, and simpler and faster forms. However, it is also possible for the use of multiple databases to slow performance since, by default, Planning creates member formulas with the @XREF function to retrieve data from the source database for members in other databases. You may consider using partitions or calc exports scripts in Essbase as an alternative to using @XREF if you find performance issues with data integration across plan types.

**Dimensions**

When designing Planning applications, you need to understand each of the standard types of Planning dimensions so that you tag them correctly in your application.

The dimension tagged **Scenario** allows administrators and users to apply different planning methods to scenarios, create new forecasts, associate different scenarios with different time periods, associate different scenarios with different exchange rates, and compare and analyze different scenarios. Typical Scenario members are Actual and Budget.

The dimension tagged **Version** is independent of the Scenario dimension. Versions are available to all scenarios and are tagged either Target or Bottom Up. The version dimension can be used to allow multiple iterations of a plan like Preliminary and Final, model possible outcomes such as Best Case and Worst Case, manage dissemination of plan data like Internal and External, and facilitate target setting.

The **Account** dimension has built-in financial intelligence for calculating variances. This dimension also gives you the ability to treat accounts differently with regard to time balances.

The **Entity** dimension is used for Approvals and for assigning currencies (if using Planning’s multi-currency functionality).

**Consistent Dimension and Member Names**

If you have reporting cubes or other EPM applications that are related to your Planning application, it is a good idea to keep member names and dimensions as consistent as possible. Ideally, the Scenario dimension should have the same name in all cubes, and the same goes for its members. Since the year and period members are in separate dimensions in Planning, it makes sense to have them in separate dimensions in reporting cubes as well. Following these guidelines will benefit the administrator as well as your end users.

**Minimize the Number of Dimensions**

Analyze your requirements very carefully and try to design applications with only the dimensions that are required for Planning. Fewer dimensions generate smaller databases, resulting in better performance and less complexity, making it easier for end users to find their data. Build only those dimensions that you need for the budgeting and planning process. Build a separate aggregate storage options (ASO) reporting database for detailed actuals reporting, and keep your Planning applications focused on just the data set needed for budgeting and forecasting. Coming in Hyperion Planning 11.1.2.3, you’ll be able to create ASO cubes from the Planning interface.

The general rule for the number of dimensions in a Planning block storage plan type is five to nine. Make
every one of them count! Avoid dimensions that do not offer descriptive data points to help reduce the complexity and size of the database. Remember that adding a dimension increases the size and complexity of a database exponentially, not arithmetically.

Are you planning by more than three very sparse dimensions for a single plan type? If you answered yes, consider the potential pitfalls of your design.

A colleague recently reviewed a Planning application requirement that included dimensions for cost center, profit center, company coding structure and legal entity. While there were many issues with this, the two biggest concerns were:

- The structure was too complicated and too detailed for end users to comprehend and navigate at this granular level.
- The slow performance in the application was an absolute show stopper.

Just say no when your design committee says they have to have all of these dimensions. As an alternative, consider Smart Lists to capture these types of details in place of dimensions. Or wait for the ASO plan type/cube support in 11.1.2.3. (ASO databases can handle 20+ dimensions and millions of members.)

Brown Bag Training for End Users

Good Planning administrators meet regularly with users to train them on the features and functions that can make their jobs easier. The Planning user interface has changed significantly over the last versions, giving end users powerful capabilities out of the box.

Documents in Forms

One of the newer features available to users in Planning is the ability to attach and edit documents to data form cells by right clicking on a cell and selecting Add/Edit Document (Figure 3). I’m sure you can think of a variety of uses for this feature, but you might also have concerns about security. Don’t worry. The ability to add and edit documents in a cell is inherited from the data security applied to the cell.

Show Member Formulas

The Show Member Formula option gives planners the ability to see the outline member formulas for calculated members in a form. If this feature is enabled, an icon is displayed next to calculated members indicating that their formulas can be displayed, which helps planners have a better understanding of how certain members are calculated.

Sort and Filter

Beginning in version 11.1.2.1, Hyperion Planning supports several new form options available to planners via right-click. Planners can sort and filter rows and columns in a data form. Sorting and/or filtering applied to a form by a planner are only applied while the planner has the form open, and it won’t interfere with other planners using the same form.

Analyze and Ad Hoc Grids

Also starting in version 11.1.2.1, users can “analyze” in a data form over the Web or in Smart View, changing the page, row and column layout; drilling into dimensions; and applying ad hoc options (if granted the Analyze role). Users may also create new ad hoc grids, freeing them from the standard data form structure. Ad hoc mode gives planners the ability to pivot, zoom in and out, keep only, and remove only. Ad hoc mode also gives planners the ability to save a form as their own, and since security is applied to the “personal” grids, a planner will only be able to open and reuse the ad hoc forms that they have saved.
Comments

Multiple planners can add, view, edit and delete comments within a data form (Figure 4). A small red square in the cell’s upper-right corner indicates that it contains cell-level documents. You can see the cell’s intersecting members by hovering over the red square. Rich text formatting is now supported.

View Data History

Have you or your users ever wanted to view a cell’s history or changes? If the Auditing for Data feature is turned on, planners can view the data history of any numeric, date or text cell to which they have at least read access in version 11.1.2.2.

To view a cell’s data history, right-click in the cell and then select Show Change History (Figure 5).

Full Planning Functionality in Smart View

Beginning in version 11.1.2.1, there is full Planning functionality in Smart View. This means that you can now use composite data forms, task lists, approvals and more in Excel. It also means that Task Lists are integrated into Excel and Outlook. You can use Outlook functionality to help your users plan.

Check the Caches

Each plan type in a Planning application has a corresponding database in the related Essbase application, and each of these databases has at least one index file (e.g., ess00001.ind) and at least one data (i.e., page) file (e.g., ess00001.pag). The index and data cache settings determine how much of the “data” from these files Essbase can keep in memory.

The index cache should be set to approximately the combined size of all of the index files if possible. If the server doesn’t have enough memory to accomplish this, set the index cache size as high as you can. Keep in mind that no performance improvement results from setting the index cache size higher than the combined size of all index files, so doing so will just waste system memory.

The data cache should be set to approximately one-eighth of the combined size of all of the data/page files (maybe even more if you have the hardware to support it). Consider increasing the data cache setting if you have many users accessing different data blocks concurrently or if you have calculation scripts that contain functions on sparse ranges and those functions (e.g., @RANK and @RANGE) require all members of a range to be in memory. Also, increase the caches if you have hefty new servers that can handle more data in memory (e.g., the new Exalytics option).

Defragment the Database

Fragmentation can be a potentially crippling side effect of frequently updated databases. Let’s assume that we have a very simple block with only eight cells:
Any of Essbase’s compression methods would work well for this example, but let’s assume Run-Length Encoding is used and is able to compress the data storage component to 32 bytes (eight bytes for the 100 and 24 bytes to compress all the #Missing values together). Then, a user writes some budget data to this block:

<table>
<thead>
<tr>
<th>100</th>
<th>#Missing</th>
<th>#Missing</th>
<th>#Missing</th>
</tr>
</thead>
<tbody>
<tr>
<td>#Missing</td>
<td>#Missing</td>
<td>#Missing</td>
<td>#Missing</td>
</tr>
</tbody>
</table>

This block will now require 48 bytes to store (eight bytes for each number, and 24 bytes for the #Missing values). Fragmentation happens because Essbase can’t fit 48 bytes back into the original 32-byte location, and it is written to the end of the file. The original block remains in the file, but there is no corresponding pointer in the index file; it is lost forever but still taking up space. Actually, it’s not quite forever. Essbase tracks empty space in the database directory in a .esm file.

Now that you understand fragmentation, an alarm should be going off for all Planning administrators — Ding, Ding! Budgeting not only involves frequent updates but also calc scripts that expand block size. Fragmentation also runs rampant when data load rules aren’t sorted properly and blocks are written to the .pag file then updated later in the load and re-written to a new block location. In short, if you have Planning, you probably have fragmentation issues.

To eliminate fragmentation, you can export the data from the database to a file, clear all data from the database and reload from the export file. Even better, run the Essbase MaxL command, `alter database [database name] force restructure`, which removes all fragmentation from the database.

**Grid Diagnostic Tool**

In 11.1.2.2, a new Grid Diagnostic tool will help you diagnose your data forms and understand how they are performing (Figure 6). To access the Grid Diagnostic tool, select Tools>>Diagnostics>>Grids. Select the desired data forms and click Run Diagnostics. Information related to the page load times, number of rows retrieved and number of rows suppressed is displayed, helping you to understand data form performance from the end user’s perspective with a technical slant of what is going on “behind the scenes.”

**Conclusion**

I hope that these highlights of Planning tips and tricks will improve the quality of life that you have as a Hyperion Planning administrator. Key lessons include:

- You’ll continue to have maintenance-related activities; use the utilities and other features to make this as efficient as possible.
- Your users will ask for new applications and ways to use Planning.
- You need to tune Planning apps regularly, especially defragging.
- You will need to keep up with the new versions of Planning and its exciting features and enhancements.

The day in the life of the Hyperion Planning administrator is never dull, never truly finished and probably will never be described as carefree. But the more you know about this powerful solution, the more carefree days you’ll have as a Planning administrator.

Tracy McMullen, coauthor of the bestselling book series Look Smarter Than You Are, is the director of product strategy for interRel Consulting. She is certified in Oracle Hyperion Planning, Hyperion Financial Management, Oracle Essbase and Data Relationship Management and is also a Project Management Professional (PMP). She serves as an Oracle ACE Director and is the Hyperion SIG Planning Domain Lead. Tracy has been leading implementations of EPM/BI and Data Warehousing systems for more than 15 years.
Taking EPM to New Levels with Oracle Hyperion Data Relationship Management

By R. Michael Smith, TopDown Consulting

Organizations all over the world are realizing the advantages of analytical solutions. They are also integrating their operational data into their analytical systems to further its benefits. Master data is critical in every one of these operational, analytical and reporting solutions and must be coordinated across all of the systems. Many organizations have no strategy to address this issue.

This article discusses the need for processes identifying common definitions as well as Oracle’s Hyperion solution for managing master data – specifically Oracle’s Hyperion Data Relationship Management (DRM) application – and how to leverage it in an enterprise system. To help illustrate this further, we’ll also look at real-world examples of different ways in which DRM is integrated into the enterprise solution.

Key Components

There are several key components to the successful implementation of any master data management (MDM) solution, the most important of which are a comprehensive information governance process and an MDM toolset.

The goal of the information governance process is to create a consensus on master data and its meanings. The MDM toolset must be capable of implementing the results of the governance process in order to both capture and distribute them to the enterprise systems. The tool should provide a repeatable process around the master data solution including validations and verifications for conformity with business rules.

Information Governance Process

Every organization should create and maintain an alignment between the operational and the analytical business data in order to ensure a consistent set of information. Without this, many definitions of the same term can occur and cause considerable misunderstandings with management. In order to properly communicate across all systems, an information governance process should be set up to develop common hierarchies, relationships, business rules, terminology and formulas across the entire enterprise. This is critical in accomplishing a unified view of the organization.

An executive group or data governance council should also be formed. This group consists of representatives who have the authority to make
final decisions about the master data and are responsible for signing off on decisions. Data stewards must be assigned from all systems and organizations involved in the enterprise solution and are responsible for identifying, discussing, agreeing upon and proposing to the data governance council all common objects and definitions. Initially, data stewards must meet to develop the standards and address existing issues. The proposed standards and resolutions are then presented to the council for final decisions.

The information governance process requires initial investments of time and resources, but they will pay dividends by eliminating or minimizing miscommunication, conflicting reports, data validation problems, integration issues and unnecessary meetings to resolve these concerns. Once the initial standards are established, existing issues are resolved and the new process is in place, data stewards meet regularly to discuss new items and submit recommendations to the council as needed. This ongoing effort is part of a continual cycle and is not as time-consuming as establishing the initial consensus.

The outlined process is often trimmed down when DRM is implemented in a smaller, more focused environment, particularly when DRM will be a recipient of data from another system (e.g., when an ERP is the initiator of the metadata). In this case, it is often necessary to handle differences, conflicts and issues in the metadata that affect downstream systems; for example, when addressing duplicates. In some systems, such as Essbase, it may be necessary to prefix different dimensions and add the unique members’ names as a suffix to descriptions in order to make them unique. This is one method often used to differentiate. Had this been addressed in a bigger picture governance process, the members and aliases would already be unique and void of any special characters that can cause problems for downstream systems. These additional rules are often built into the initiating process as business rules. Without this up-front enforcement, the downstream systems or tools, such as DRM, must address any issues this may cause.

Technical Solution

A toolset that can implement the results of the information governance process is critical and must be able to:

- Provide a centralized, consistent, single source of truth for metadata.
- Manage a wide range of hierarchies.
- Enable business users to maintain the metadata.
- Allow creating alternate hierarchies not available elsewhere in the organization.
- Include an approval process and change management all in a user-friendly interface.

DRM provides all of these capabilities and should be an integral part of any MDM strategy. Many of the metadata projects are sponsored by the finance organization where there is a mix of business users and superusers. Many of the superusers are able to function in a development capacity by building properties as well as validation and verification rules to ensure that the metadata meets business rules. These may range from account numbers all having 10 numerical digits to more complex parent-child dependencies. They may also be involved in building out custom measures used in downstream systems that include formulas. The business users are relied upon to create or validate the new members and their proper locations in the hierarchies as well as to set properties for the members. Security can limit what members and properties the business users can view and which ones they can change.

Change management/control and audit/compliance are all included in the DRM toolset, which is very powerful when integrated with a complete solution. Following are a few examples of the many possibilities available. All changes to any hierarchy, member or property are individually captured and are available in
a searchable log. Different versions can be created from an existing version of the hierarchies from any point in time, and new copies of the version may be created once a version is finalized in production and work on the next month begins. A status on the versions can be set to provision who can make changes to it.

**Financial Data Repository (FDR)**

As a part of many MDM solutions, relational databases often play a very useful role. They can serve as a core tool in the metadata management process and can provide a central point of access, maintenance, preparation, historical backups, comparisons and ease in retrieval for all metadata. This central database is commonly referred to as a Financial Data Repository (FDR). Many companies already have a relational database in their enterprise solution, so the FDR leverages both an existing core tool and an existing skill set.

One of the ways to leverage a relational database during the MDM process is to prepare the master data for use in DRM. Although DRM can also do a lot of the tasks described, it is often better to help reduce its workload by completing some of these tasks prior to loading them into DRM. If a company is using DRM, a relational database can reduce the amount of metadata that needs to be loaded by identifying only the changes that need to be made instead of importing everything and then using DRM to identify the changes. It can also serve as the target from DRM, providing access to any applications capable of pulling their metadata from tables.

One method for identifying new master data members is to bring them into the database from the initiating system (e.g., an ERP), in which comparisons may be made with the previous version, and differences can often easily be identified by using simple SQL commands. This is extremely useful when large metadata sets are involved. Stored procedures and views may be leveraged to build out files for loading into the downstream systems. These stored procedures can easily provide DRM with just the changes to properties in a simple file that can be loaded. If DRM is not the MDM solution used by the company, the data can still be prepared to support whatever system will receive these changes/updates.

Another advantage in using an FDR is the ability to retrieve hierarchies. A query can build the hierarchy in the correct order for loading into a target system, and if there was a sequence when it was loaded, this can be maintained throughout the process. If there wasn’t an order before, the hierarchy can be built recursively from the top down so it loads correctly into the target systems. This also helps in maintaining and validating the hierarchy. Changes can be verified for the correct depth of the nodes, shared members and connections from parent to child, ensuring inclusion of all of the members. These are just some of the advantages to leveraging an existing asset and skill set as a component of the MDM solution. An FDR is versatile and can help reduce the overall effort of the solution by preprocessing changes. It can also format the master data in a variety of ways for subsequent use by downstream systems.

**Real World Examples:**

In the following examples, two different methods of utilizing DRM are shown. The first takes a feed from the enterprise system; imports it into DRM; moves the new members and changes into the proper location in the hierarchy; leverages DRM properties in the export; and pushes them downstream. The second initiates the master data members inside DRM, assigns properties and pushes them downstream. This is how the tool is really designed and leverages its strengths the best, though many organizations cannot go straight to this and must take the hybrid approach of the two. Often there are established processes around an ERP system, for example, and to use DRM as the initiator and build all interfaces required to retrofit these systems is unlikely, especially in the short term.
Large International Energy Services Company

In this example, most of the master data is created within SAP and then pushed into an Operation Data Store (ODS) within an Oracle database. Batch scripts were written to extract the metadata in a parent-child format with aliases from the database into formatted input files for DRM. These files were then imported into DRM, and a blend was performed to add new members and move any existing members and update the aliases. The legal entity structure had to be pulled from a separate SQL server system, which was done in a similar fashion.

The account dimension was handled in two different ways; one for an Essbase reporting cube and another for Oracle’s Hyperion Financial Management (HFM) software. Since the accounts from the ODS were all located within SAP account sets, the Essbase account hierarchy was built so that the account sets were included in the correct places within the hierarchy, though they were not included in the hierarchy export. This allowed the blend within DRM to properly place the accounts under the account sets. If a new account set came in, it was identified within a different comparison. This batch process was built so that it compared the new members with the blended hierarchy and exported differences into a DRM import file. This file was then re-imported and the new accounts were then located under a special member used to store new members. From this location, a user can drag and drop the member into the correct location with all of its correct properties. In addition, there were many custom measures included in the reporting cube’s account hierarchy that did not apply to HFM. DRM can be used to store not only the members but also the formulas.

The HFM account hierarchy had a few different requirements. The cash accounts were consolidated by combining an export from DRM that mapped all of these cash accounts to new summary parents within FDM. FDM allows for these explicit mapping files to be loaded. These are CSV files containing the “from account” and “to account” with possibly another property depending on the dimension. The base cash accounts were not pushed from DRM into HFM as only the summary parents were needed. As the hierarchy itself was very different, a similar process to the one described above was used to prepare accounts for placement in the HFM hierarchy. Since the siblings of these accounts were known in the initial load of the new account hierarchy from SAP, the DRM administrator could propose the locations in HFM, which were often correct unless it was identified as something that needed to be tracked separately.
Large Oilfield Services Company

In this example, JD Edwards is the system of record for many of the hierarchies. Instead of an automated pull, the same team that manages the JD Edwards hierarchies also manages DRM and inputs the new members in both places at the same time. This can be done manually, but typically uses the automator feature. This feature allows you to “import” a CSV file with the members, their parents and properties defined. The “import” actually makes the calls required to the API interface to execute the actions you define for it in the automator file. This may include adding a node, updating properties, deleting or moving a node, among other options. This powerful feature can be easily combined with a relational database to create a simple solution used to update master data from external sources. If the master data is loaded into the database, it can be compared to the previous load and an automator file can be built containing the differences. The file is then run into the new month’s version of the hierarchies. This can be written into a batch job so that all of the changes are made without manual intervention required.

Summary

An MDM strategy that includes an information governance process in conjunction with Oracle’s Hyperion DRM eliminates the siloed approach to preparing master data and measures for reporting/analysis and transactional systems. It forces a consistent set of business processes that will guarantee master data integrity and uniformity. DRM provides the capability to build in business rules that both help you create the master data within the tool in addition to loading and checking it afterwards. By implementing this strategy, organizations can reduce the time spent preparing master data for use by business intelligence reporting environments. More importantly, it allows the business analyst to step away from master data integration and get back to analyzing the enterprise data.

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10 WAYS TO SPEED UP YOUR UPGRADE

As more customers tackle the Oracle E-Business Suite (EBS) Release 12.1.3 upgrade, finding ways to minimize downtime has become a key tactic. Reducing the time to upgrade has several benefits:

- Less time to do the actual upgrade means more time to test it during the production rollout.
- A faster upgrade reduces the exhaustion factor for key players, making them less likely to make mistakes.
- The faster the upgrade hardware, the more iterations can be run in a shorter period of time, resulting in a lower cost and shorter project duration.

Following are 10 things you can do to speed up your EBS R12.1.3 upgrade:

1. **Use Fast I/O – Solid State Drives (SSDs) for the database files.**
   Solid State Drives (SSDs) are storage devices that store persistent data on solid state flash memory. This makes them much faster than standard disk drives, though at a higher price.

   Before we put the database files and the APPL_ TOP on solid state disks, the R12.1.1 upgrade patch 6678700 took 28 hours on spinning disks. After implementing SSD, the 12.1.1 patch takes nine hours.

2. **Avoid in-place upgrades; benefit by using a new server for the upgrade machine.**
   An in-place upgrade is performed on the existing production server and is risky. The biggest risk is if the upgrade fails and you need to recover the original instance. Recovery can be complex because when installing the R12.1.1 software, the installer updates AutoConfig parameters in the database and entries in the oraInventory.

   If you plan to do an in-place upgrade, your test servers for the upgrade certainly aren’t configured the same as production and you can never get accurate timing information for your production in-place upgrade.

   It’s best to purchase a new, faster server and clone the production system to the upgrade server so you’ll know exactly how long it will take to upgrade. This allows you to measure the upgrade time on the actual machine you’ll use for the production upgrade. If the upgrade fails, you won’t have to restore the production server because it will have been left unchanged and ready to be put back into production if necessary.

3. **Incorporate plenty of disk space to stage files.**
   You can stage the R11i files so you don’t have to clone them before the upgrade. You can also stage the R12.1.1 files so you don’t have to reinstall them just before the upgrade.
and then stage the post R12.1.3 files with all the customizations. Anything you can do to streamline the upgrade process and eliminate manual tasks is a valuable time saver.

Try increasing `PARALLEL_MAX_SERVERS` to allow greater parallelization.

The `PARALLEL_MAX_SERVERS` parameter is a database initialization parameter that specifies the maximum number of parallel-execution server processes allowed on an instance. Once the number of parallel-execution servers reaches this limit, no new ones are started.

When you issue a parallel SQL statement with a degree of parallelism of four, the query coordinator recruits four parallel-execution servers to perform the task. It takes time to start a parallel-execution server process. Consider setting `PARALLEL_MIN_SERVERS`, the minimum number of parallel-execution processes for the instance, to a higher value than the default, which is zero.

If you start a query with a requested degree of parallelism of eight, but only four parallel-execution servers are available, then the number of parallel-execution servers will reach `PARALLEL_MAX_SERVERS`. In this case, the query will execute with a degree of parallelism of four – the four available parallel-execution servers will perform the task.

If you then execute another query, there are no available parallel-execution servers, and new ones cannot be started because the limit specified by the `PARALLEL_MAX_SERVERS` has been reached. In this case, your query will execute in serial.

The default value for `PARALLEL_MIN_PERCENT` is zero. This means that when there are not enough available parallel-execution servers, and their count has reached the `PARALLEL_MAX_SERVERS` limit, your task will execute with either a reduced degree of parallelism or in serial. Query the V$SYSSTAT view to identify how many parallel operations were executed with a reduced degree of parallelism or in serial (Figure 1).

If you set the `PARALLEL_MIN_PERCENT` parameter to anything higher than zero, your SQL statement will be executed only when the minimum percentage of parallel-execution servers is available.

In our testing, when we increased the `PARALLEL_MAX_SERVERS`, we saw CPU utilization increase from three percent to 30 percent. With `PARALLEL_MAX_SERVERS`=8, we saw a degree of parallelism of about eight, and only a few processes would run at a time. When we increased the `PARALLEL_MAX_SERVERS`, this allowed the default degree of parallelism to be fully utilized but it was still limited by a relatively low DOP of 64. The default degree of parallelism is `parallel_threads_per_cpu`, or `CPU_COUNT=32`, and `parallel_threads_per_cpu=2`, or a default DOP of 64.

When we tested increasing `PARALLEL_MAX_SERVERS` to 512, we saw the following error:

```
ORA-12801: error signaled in parallel query server P089
ORA-12853: insufficient memory for PX buffers: current 2634784K, max needed 3170304K
ORA-04031: unable to allocate 65560 bytes of shared memory ("large pool", "unknown object", "large pool", "PXmsg pool")
```

To eliminate this error, we tried increasing the `LARGE_POOL_SIZE` but eventually saw the same error again. We lowered the `PARALLEL_MAX_SERVERS` to the highest possible value (for our servers, 300) that worked without causing the shared memory error.

Ultimately, the parameters that worked best for our hardware were:

```
PARALLEL_MIN_PERCENT=0 (the default)
PARALLEL_MAX_SERVERS=300 (the default was 8)
LARGE_POOL_SIZE= varies (dependent on machine and memory)
```

The performance improvement due to adjusting the `PARALLEL_MAX_SERVERS` for our hardware environment was 30 percent. We concluded that adjusting this parameter is well worth the time it takes to evaluate the best setting for your hardware platform.

Avoid using a threaded CPU architecture for the database server.

The term thread is an operating system concept that has the potential to execute independently of other threads.

<table>
<thead>
<tr>
<th>NAME</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parallel operations not downgraded</td>
<td>9</td>
</tr>
<tr>
<td>Parallel operations downgraded to serial</td>
<td>3</td>
</tr>
<tr>
<td>Parallel operations downgraded 75 to 99 pct</td>
<td>0</td>
</tr>
<tr>
<td>Parallel operations downgraded 50 to 75 pct</td>
<td>0</td>
</tr>
<tr>
<td>Parallel operations downgraded 25 to 50 pct</td>
<td>2</td>
</tr>
<tr>
<td>Parallel operations downgraded 1 to 25 pct</td>
<td>1</td>
</tr>
</tbody>
</table>

Figure 1

```sql
SELECT NAME, VALUE FROM V$SYSSTAT WHERE NAME LIKE 'Parallel%';
```
A logical core can execute one sequence of commands. The operating system distributes all the threads to all the logical cores available. If there are more threads than cores, threads are processed in a fast queue, and the core switches from one to another very quickly.

Now, let’s assume that CPUs that have threads can do as much work as CPUs without threads. A socket that has two cores, each with eight threads, can provide the processing power of one “normal” CPU. Each of these threads can work about one-sixteenth of a “normal” CPU. The CPUs with threads get counted during the install as having 16 CPUs even though there are only two cores with eight threads each. It will look like all the threads run simultaneously, when actually the OS distributes CPU time among them.

Having multiple cores gives the advantage that less concurrent threads will be placed on one single core, and less switching between threads equals greater speed.

Examples of single-threaded tasks include data manipulation language (DML) operations, such as creating new large indexes, one at a time. Threads aren’t very good with heavy loads, whereas non-threaded CPUs are very good with single-threaded processes with heavy loads.

In the following screen shot, all the processing is being done by “worker 1.” The worker in phase A35 in this example is running CREATE INDEX statements for large indexes.

If you do use a threaded CPU server, use Automatic Degree of Parallelism (ADOP) to increase the parallelism.

Our testing shows that if you must use a threaded CPU server, you should use Automatic Degree of Parallelism (ADOP) to increase the parallelism. By doing so, you can increase performance using parallel processing, which will improve performance of the smaller tasks, but there is no way to compensate for the larger, single-threaded tasks.

Prior to Oracle Database 11gR2, if there were insufficient parallel servers to satisfy the requested DOP, one of three things might occur:

- The SQL would be run at a reduced DOP (it would be downgraded).
- The SQL would run in serial mode (it would be serialized).
- If PARALLEL_MIN_PERCENT was specified and less than the nominated percentage of the DOP was achievable, then the SQL statement might terminate with “ORA-12827: insufficient parallel query slaves available.”

There are three levels to ADOP:

- **Manual:** When we set PARALLEL_MAX_SERVERS to 300, Manual would use 200 servers on one query, 100 servers on another query and then, no other queries would be run in parallel, because all the servers were used.
- **Limited:** When accessing tables and indexes that have been defined with the parallel clause, Oracle will decide on the degree of parallelism based on the query and system resources. This option does not use parallelism on queries that don’t use a parallel hint.
- **Auto:** Oracle will decide on the degree of parallelism for every query. In addition, two exciting new features are enabled: parallel statement queuing and in-memory parallel execution.

Parallel statement queuing is in itself a reason to use ADOP. When Oracle determines that a statement should run with eight parallel processes, but only six are available, Oracle will not degrade the statement. It will queue it and execute when the processes become available.

**In-memory parallel execution** means that Oracle will not automatically use direct path for parallel processing IO. Instead, depending on the size of the object, its volatility and the size of the buffer cache, Oracle may decide to load the blocks that are needed by the query to the buffer cache.

In Oracle Database 11gR2, if PARALLEL_DEGREE_POLICY is set to AUTO, the default behavior is instead to block the SQL from executing until enough parallel slaves become available.

Now we have plenty of parallel servers, and parallel_degree_policy is set to AUTO. However, the system was still only using one or two threads at a time, and the average CPU utilization was about six percent. Since we are using a multi-threaded architecture, we increased parallel_threads_per_cpu from two to eight.

**alter system set parallel_threads_per_cpu = 8;**

In our testing, when we increased the parallel_threads_per_cpu from two to eight, performance really took off. Now we are seeing large numbers of jobs running very quickly with a more even load on the server (See Figure 2 on next page).

Monitor performance for each upgrade patch, and search for performance improvements on MOS.

We found the solution to very slow XDOLOADER performance in MOS Doc. ID: 1065393.1, 12.1.1 UPGRADE
FROM 11.5.10.2 VERY SLOW XDOLOADER TASK HANGS.
Messages in the database alert log were: WARNING: inbound connection timed out (ORA-3136). According to the MOS note, The XDOLoader uses JDBC, which uses the /dev/random directory. When the entropy pool is empty, reads from /dev/random will block until the data is refreshed. A read from the /dev/urandom device, on the other hand, will not block while waiting for more entropy. The solution, which was certainly not initially obvious, was to create a link to point to /dev/urandom instead of /dev/random.

8 Disable ARCHIVELOG Mode and Auditing.
To disable ARCHIVELOG mode, run the following commands:

```sql
SQL> alter system set log_archive_start=False scope=spfile;
SQL> create pfile from spfile;
SQL> shutdown immediate;
SQL> startup mount exclusive;
SQL> alter database noarchivelog;
SQL> alter database open;
```

Auditing
Set AUDIT_TRAIL=NONE, which disables auditing altogether, but requires a bounce of the instance.

9 Use trace to diagnose performance issues.
In the example below, we had a significant performance problem that was system-wide.

When we ran tkprof on the tracefile and examined the tkprof output, we discovered that a procedure called mcafee_sensor_mon_pkg.post was taking .36 seconds per call.

The mcafee_sensor_mon_pkg.post procedure is called when a SQL statement is executed by the patch. Over the 33K calls of this procedure, we measured a total time of 11880 seconds waiting for McAfee to complete. This equated to 3.3 hours just during phase A35, waiting for McAfee. As soon as we turned off the trigger for this event, the time to complete phase A35 was decreased to about one hour.

10 Look for functional scripts and datafixes from Oracle.

- fapupg.sql, fumamcr.sql and glrsup2.sql are three examples of Oracle-supplied code that allow you to run depreciation, pending mass addition lines, and prepare posted journals in advance before starting the upgrade. Doing work in advance of the upgrade will shorten your downtime.
- Oracle has made significant advances to R12.1.1 using MOS Document 1448102.1, Oracle E-Business Suite Pre-install Patches Report. Use the patches from the Pre-install Patches Report with the R12.1 EBS Consolidated Upgrade Patch 1 (CUP1) Patch 7303029. The patches from Pre-install Patches Report replaces code that streamlines the upgrade process considerably.
- Upgrade by Request, the SLA Pre-Upgrade Concurrent Program, included in Patch 5233248, allows you to process a smaller subset of data for Payables, Receivables, Purchasing, Project Accounting, Inventory/Costing and Fixed Assets.
- Oracle provides a large number of Generic Data Fixes (GDFs) to address issues with data but significantly notes that if customers had correctly applied a collection of Recommended Patch Collections (RPCs) for financials after upgrading to R12.1.3, many of the issues found after the upgrade simply would not occur. See MOS Doc. ID: 954704.1, EBS: R12.1 Oracle Financials Recommended Patch Collection (RPC) and MOS Doc. ID: 1360390.1.

Mike Swing is an Oracle Certified Professional DBA and Oracle ACE with 22 years’ experience in database administration, design and development. He has authored several books, including the OAUG-sponsored book, “the little r12.1.3 upgrade guide.” He has 17 years’ experience implementing, administering and upgrading the Oracle Applications E-Business Suite. Mike is also an instructor for Oracle training classes, including Release 12 DBA Concepts and Administration and the R12.1.3 Technical Upgrade.
Managing Optimizer Statistics Collection within an E-Business Suite Database

Managing cost-based optimizer (CBO) statistics is one of the most important and challenging tasks an Oracle database administrator performs. When doing this in an Oracle E-Business Suite (EBS) environment, there is a superset of tools that you should use to correctly manage statistics. This article highlights two components available in EBS Release 12.X and EBS Release 11i CU2 (11.5.10.2).

The primary consideration is to avoid the temptation of directly running the various procedures in the DBMS_STATS package. This is not supported in an EBS database and results in sub-optimal execution plans. Instead, use Oracle-supplied concurrent programs or make calls to the FND_STATS package of procedures outside of the concurrent manager.

Statistics may be stored in the default table called FND_STATTAB located in the APPLSYS schema, or one may create others in particular schemas using the FND_STATS.CREATE_STAT_TABLE. Our example will deploy the standard APPLSYS FND_STATTAB table. The syntax: fnd_stats.load_xclud_tab(‘INSERT’, ‘APPLICATION ID associated with the table’, ‘TABLE_NAME’).

So, for example, where we are satisfied that we have representative statistics on volatile tables in an HR system, we might do the following:

```
BEGIN
  fnd_stats.load_xclud_tab(‘INSERT’,800,’HR_LOCATIONS_ALL’);
  fnd_stats.load_xclud_tab(‘INSERT’,800,’HR_NAME_FORMATS’);
  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_COST_ALLOCATIONS_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_COST_ALLOCATION_KEYFLEX’);
  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_ELEMENT_ENTRIES_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_ELEMENT_ENTRY_VALUES_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_ELEMENT_LINKS_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_ELEMENT_TYPES_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,800,’PER_ALL_ASSIGNMENTS_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,800,’PER_ALL_PEOPLE_F’);
END;
```

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  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_ELEMENT_ENTRY_VALUES_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_ELEMENT_LINKS_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,801,’PAY_ELEMENT_TYPES_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,800,’PER_ALL_ASSIGNMENTS_F’);
  fnd_stats.load_xclud_tab(‘INSERT’,800,’PER_ALL_PEOPLE_F’);
END;
```
If there is degradation in functionality supported by any of the tables, you can unlock the statistics using the same package with new statistics generated during the next collection period. An example:

BEGIN
  fnd_stats.load_xclud_tab('DELETE',800,'HR_LOCATIONS_ALL');
  fnd_stats.load_xclud_tab('DELETE',800,'HR_NAME_FORMATS');
  fnd_stats.load_xclud_tab('DELETE',801,'PAY_COST_ALLOCATIONS_F');
END;

The above code will remove the tables from the “exclude list.”

**Backing Up Statistics**

The FND_STATS.BACKUP_TABLE_STATS procedure can accommodate the need to backup statistics, or the DBA may deploy the concurrent program, "Backup/Restore CBO Statistics." The parameters of the registered program include an action (BACKUP or RESTORE), schema name (such as HR, PA or GL), a table_name, the name of the stat table, and the stat id. If one used the default stat table, no argument is required for that parameter. There is another concurrent program called “Backup Table Statistics” that permits a larger and more descriptive stat id but does not provide a list of values for the available schemas and tables as this particular program does.

A stat id is also optional, but providing a descriptive name is beneficial during the restore operation should statistics need to be rolled back and if different sets of statistics exist for the same object or collection of objects. My preference is to use concurrent manager programs where they exist in a database so that the operations may be documented via the running of the programs. Concurrent manager log files may be extracted and saved to a file system that is not purged by cleanup and purge operations. In a hypothetical run of the concurrent program, we may specify the arguments: BACKUP, HR, PAY_ELEMENT_ENTRIES_F, NULL (to use the default stat table in the APPLSYS schema) and ‘feb2013’ (the stat_id).

After the concurrent manager program completes, a query of the FND_STATTAB table indicates that:

```sql
SQL> SELECT COUNT(1) FROM FND_STATTAB
2 WHERE STATID = 'feb2013';
COUNT(1)
---------
  288
```

I recommend backing up statistics prior to the creation of new statistics. Most of the FND_STATS procedures, whether run via the concurrent manager or PL/SQL programs, enable complete database (affects performance if this is done outside of an upgrade) and schema (such as HR, PA or GL) operations as well as specific table objects. Another concurrent program, “Backup Schema Statistics,” contains a parameter for a BACKUP option during the gathering of fresh statistics on ALL schemas or specific schemas.

**Concluding Remarks**

The items covered are only two of the tools provided by Oracle Corporation that enable DBAs to properly manage CBO statistics in an EBS environment. The reader is encouraged to explore the other concurrent manager programs related to CBO management, as well as the array of FND_STATS procedures provided by Oracle. The chapter called, “Managing Optimizer Statistics” in the Oracle Database Performance Tuning Guide provides the DBA with background necessary to deploy the tools described in the Oracle E-Business Suite System Administrator’s Guide – Configuration (E18727_01). No two EBS environments are the same because no two companies run the exact same EBS products in the same configurations. For this reason there is no single way to handle CBO statistic management.

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Under the steadfast watch of the giant blue bear at the Colorado Convention Center in Denver, more than 5,500 COLLABORATE 13 attendees braved 60-degree temperature changes, bracing winds and a couple inches of snow during another very successful, annual conference.

Unparalleled Education
COLLABORATE 13 featured more than 1300 sessions in 23 focused educational tracks for Oracle Applications and Technology professionals. The COLLABORATE 13 – OAUG Forum presented more than 600 educational sessions covering topics relevant to Oracle Applications users.

COLLABORATE 13 was hosted by conference partners IOUG, the OAUG and Quest.

Networking
COLLABORATE 13 offered numerous events and venues to help attendees engage with peers to gain insight into what other users are doing and to establish contacts for ongoing communication and information exchange.

The OAUG kicked off the week with an exclusive, after-hours networking evening at the Denver Art Museum. Amid the awe-inspiring exhibitions of northwest coast Indian art, American Indian art, historic western American art and performances by live native-American dancers, guests were able to forge new connections and see old friends.

During COLLABORATE 13, the OAUG held its first-ever Ambassador Appreciation Networking Breakfast, where Ambassadors were recognized for their efforts and heard about the newest resources available to them through their OAUG membership. OAUG Board members also shared details of upcoming initiatives, and Ambassadors provided feedback and suggestions for the benefit of the program and the OAUG community.

Ambassadors act as the OAUG’s main point of contact within member organizations and ensure that their colleagues are kept up to date on all of the free, online education and other resources made available exclusively to them as OAUG members. The OAUG appreciates each Ambassador’s effort to educate their colleagues and maximize the value of their OAUG membership. For more information about the OAUG Ambassador Program, visit oaug.org/ambassadors or contact ambassador@oaug.com.

COLLABORATE 13 attendees also sampled great street fare, browsed unique merchandise and enjoyed local entertainment at the closing Urban Revival Party on Wednesday evening.
Additional events throughout the week brought people together over drinks, food, fun and entertainment.

Back by Popular Demand
- The New Attendee Orientation on Sunday afternoon welcomed first-time COLLABORATE attendees as well as returning veterans. With a standing-room-only crowd, OAUG volunteers and staff highlighted key activities and offered tips for making the most of the COLLABORATE experience.

Awards & Special Recognition

The OAUG salutes the 2013 Member of the Year and Innovator of the Year for significant contributions to the Oracle Applications community. The 2013 OAUG Member of the Year is Michael Brown of member company Colibri Limited. In addition to his long service to the OAUG Database Special Interest Group (SIG), Michael has paved the way for multiple, related SIGs to work together and has contributed beyond the call of duty in assisting with OAUG educational programming.

The 2013 OAUG Innovator of the Year is the Closure Systems International (CSI) Division of Reynolds Packaging Group. As part of the Oracle E-Business Suite R12 rollout to its 25+ locations across the globe, the company successfully implemented a bolt-on process that runs as part of the standard Oracle E-Business Suite to effectively address regional localizations for the Chinese tax reporting system. CSI was nominated by Zanett Commercial Solutions. The award was accepted by Cate Lambert and Ram Kottayil from CSI.

Katherine T. Ridenour, Retired Battalion Chief, Aurora Fire Dept., Colo., speaks to attendees during the Women in Technology luncheon.

Women in Technology panelists: Carolyn Dolezal, SmithBucklin Corporation; Amrita Mehrok, Oracle; Kristin Russell, State of Colorado; Anne Plese, Cisco; Maureen Clifford, Ndevr Pty Ltd.; and Amy Doherty, AARP.

The Women in Technology program luncheon and panel discussion drew more than 500 participants. Presenters, panelists and attendees had the opportunity to hear from accomplished women in various fields as they shared personal experiences and strategies for success.

More than 9000 members in the OAUG’s active LinkedIn Group.
Collaborate – OAUG Forum on Facebook.
@COLLAB_OAUG or @OAUG1 on Twitter.

OAUG President Margaret Wright congratulates 2013 OAUG Member of the Year Michael Brown.

The 2013 OAUG Innovator of the Year Award goes to Closure Systems International (CSI) Division of Reynolds Packaging Group. Left to right: OAUG President Margaret Wright; Josh Scheumann, Zanett Commercial Solutions; Ram Kottayil and Cate Lambert, CSI.
Katherine T. Ridenour, Retired Battalion Chief, Aurora Fire Department, Colo., presented the luncheon keynote address. The panel participants were Carolyn Dolezal, EVP and Chief Executive Technology Industry Practice, SmithBucklin Corporation; Amrita Mehrok, Senior Director, Financial Applications Strategy, Oracle; Kristin Russell, CIO and Secretary of Technology, State of Colorado; Anne Plese, Director, Data Center and Cloud Solutions, Cisco; Maureen Clifford, Chief Executive Officer, Ndevr Pty Ltd.; and Amy Doherty, Vice President, ERP, AARP.

The Oracle Primavera Special Interest Group (OPSIG) returned to COLLABORATE for a third year to host an educational track focused on helping attendees use Oracle Primavera PPM products to manage projects throughout their lifecycles.

Keynoters Inspired and Informed

Monday’s moving opening keynote by Aron Ralston, adventurer and subject of the film 127 Hours, reminded participants of everyone’s capacity for the extraordinary, proving anyone can survive the most grueling circumstances.

Oracle President Mark Hurd participated in a Q&A style presentation moderated by Constellation Research Principal Analyst R. Ray Wang on Tuesday, April 9. Hurd highlighted Oracle’s interest in engaging user groups to inform and educate customers, to secure customer feedback and, ultimately, to advance customer success and satisfaction.

Sean D. Tucker, daredevil aviator for Team Oracle, shared exhilarating videos along with his philosophy for striving for excellence in all of life’s pursuits.

Phil Francisco, IBM’s Vice President, Product Management and Product Marketing, discussed how organizations can ensure their information infrastructure is ready for the new era of computing and big data.

The Oracle Primavera Special Interest Group (OPSIG) returned to COLLABORATE for a third year to host an educational track focused on helping attendees use Oracle Primavera PPM products to manage projects throughout their lifecycles.

The OAUG Membership Booth provided a unique opportunity to be heard. RadiOAUG, hosted by Business RadioX, featured live interviews with presenters, exhibitors, members and Oracle employees during COLLABORATE 13. Sample the wisdom, opinions and insights from more than 30 recorded interviews at oaugradio.com.

The OAUG Customer Support Council

One of the OAUG’s strongest advocacy groups, the OAUG Customer Support Council represents members’ interests to Oracle Support and works cooperatively with Oracle to develop and implement tools, resources and policies. During COLLABORATE 13, the council staffed a booth in the Exhibitor Showcase to explore visitors’ support-related suggestions and concerns and to gauge high-priority areas for future exploration. Council co-chairs John Schmitz and Andy Farber and Oracle Support employees also discussed the group’s cooperative relationship in two RadiOAUG interviews, available at oaug.org/resources/csc.

OAUG Geographic and Special Interest Groups

More than 50 OAUG Geographic (Geo) and Special Interest Groups (SIG) held meetings throughout the week at COLLABORATE 13. The OAUG honored recipients of the 2013 OAUG Geo-SIG Certificate of Distinction. See the article on page 34 for a list of the winners.
Exhibitor Showcase

The Exhibitor Showcase welcomed 270 companies from the vendor community who shared inspiration, ideas and expertise to help attendees discover products and services that can help them enhance the return on their organization’s Oracle investments.

The OAUG congratulates the winners of the OAUG Best of Show Awards!

- Best Exhibitor Marketing: ePrentise
- Best of Show: Velocity
- User’s Choice: Klik IT Ltd.
- Best Visionary: excel4apps*, Velocity**
- Best Traffic Stopper: HP*, IBM**
  * 200 sq. ft. and smaller
  ** 400 sq. ft. and larger

Thank you for your creative and informative exhibits!

COLLABORATE 13
Educational Materials

Hundreds of white papers and PowerPoint presentations from the COLLABORATE 13 – OAUG Forum are available to all OAUG members via the OAUG Conference Paper Database under the Education and Events tab on oaug.org. Member login required.

Oracle Participation

Oracle took advantage of the unique opportunity at COLLABORATE 13 to strengthen its relationships and investments in the users community by engaging face to face with customers.

- More than 20 Oracle experts met one-on-one with conference attendees to discuss topics related to the Oracle E-Business Suite, Oracle Hyperion and Oracle Support Services.
- Oracle executives presented product strategy roadmap sessions and conducted exclusive usability feedback meetings to provide insights into Oracle’s user-centered design process.
- Oracle employees presented more than 70 educational sessions as part of the OAUG Forum.

Save the Date!
COLLABORATE 14
will be held April 7 - 11, 2014 in Las Vegas at the Venetian & the Sands Expo Convention Center.
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](http://oaug.org) under the User Communities tab.

2013 Special Interest Groups

<table>
<thead>
<tr>
<th>SIG Name</th>
<th>Description</th>
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<tbody>
<tr>
<td>ADI SIG</td>
<td>Enterprise Visualization SIG</td>
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<tr>
<td>AP SIG*</td>
<td>Federal SIG</td>
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<tr>
<td>AR, Credit &amp; Collections SIG</td>
<td>Financial Services Industry SIG</td>
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<tr>
<td>Archive &amp; Purge SIG</td>
<td>Fusion Middleware SIG</td>
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<tr>
<td>Assets SIG*</td>
<td>General Ledger (GL) SIG*</td>
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<td>BI Publisher SIG</td>
<td>Governance, Risk &amp; Compliance SIG</td>
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<td>Change Management SIG</td>
<td>Government Contractor SIG</td>
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<tr>
<td>Channel Revenue SIG</td>
<td>Healthcare Industry User Group</td>
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<tr>
<td>Communications Billing and Revenue Management (BRM) SIG</td>
<td>Higher Education SIG</td>
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<td>Communications MetaSolv Solution SIG</td>
<td>Hyperion SIG*</td>
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<td>Configurator SIG*</td>
<td>Incentive Compensation SIG</td>
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<td>Consumer Goods SIG</td>
<td>K-12 Education SIG</td>
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<td>Contracts SIG</td>
<td>Logistics SIG</td>
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<td>Cost Management SIG*</td>
<td>Migration and Integration SIG</td>
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<tr>
<td>Customer Data Management SIG</td>
<td>Multi-National/Multi-Org SIG</td>
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<td>Customer Experience Community (CXC)</td>
<td>Oracle Agile/Enterprise PLM SIG</td>
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<td>– CRM On Demand SIG</td>
<td>Oracle Business Intelligence (OBI) SIG*</td>
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<td>– Siebel SIG</td>
<td>Oracle Primavera SIG (OPSIG)</td>
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<td>Customization and Extension SIG</td>
<td>Order Management &amp; Advanced Pricing (QP) SIG</td>
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<td>Database SIG*</td>
<td>Oracle Tax Management SIG</td>
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<td>Demantra SIG</td>
<td>OTM SIG</td>
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<tr>
<td>Discrete Manufacturing SIG*</td>
<td>Process Manufacturing SIG*</td>
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<tr>
<td>E-Business Applications Technology SIG*</td>
<td>Procurement SIG</td>
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<td>E-Business Suite SIG</td>
<td>Projects SIG*</td>
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<td>E-Business Suite User Management SIG*</td>
<td>Property Manager SIG</td>
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<tr>
<td>E-Business Suite User</td>
<td>Public Sector SIG*</td>
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<td>Energy &amp; Utilities SIG</td>
<td>Quality SIG</td>
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<td>Engineering &amp; Construction SIG</td>
<td>SysAdmin SIG</td>
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<tr>
<td>Enterprise Asset Management (EAM) SIG*</td>
<td>Treasury &amp; Cash Management SIG</td>
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<td>Enterprise Asset Management (EAM) SIG*</td>
<td>Tutor SIG</td>
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<td>Government Contractor SIG</td>
<td>Upgrade SIG*</td>
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<tr>
<td>Healthcare Industry User Group</td>
<td>Value Chain Planning SIG</td>
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<tr>
<td>Higher Education SIG</td>
<td>Workflow SIG</td>
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</table>

* Special Acknowledgement 2013 OAUG Geo/SIG Certificate of Distinction Award recipient
The Atlanta OAUG was founded in 1997 by Brenda Carlton, a local Oracle user. Although originally formed as a group of core Oracle E-Business Suite (EBS) Financials users, the Atlanta OAUG has expanded its focus to explore additional products and offerings as Oracle has acquired companies such as Siebel, PeopleSoft and Hyperion. Andrew Snyder, founder and CEO of NOODLEit, an Oracle Applications implementation consulting firm, assumed the role of group coordinator in 2007.

As an OAUG affiliated Geographic (Geo) group, the Atlanta OAUG strives to present the same caliber of speakers that are found at the annual COLLABORATE and Oracle OpenWorld conferences to bring exceptional content to the local area with minimal time and zero-cost investment for attendees. By providing quality meetings at the local level, the group encourages membership and participation in the international OAUG parent organization.

The Atlanta OAUG meets four times a year to provide educational content relevant to today’s Oracle users and IT management. In addition, the group participates in special events; the Atlanta OAUG served as the lead promoter and host for the OAUG Connection Point® – EPM/BI/Release R12.1 Upgrade conference in Atlanta in November 2011.

The Atlanta OAUG operates with the support of industry vendors that enable the delivery of free education and networking opportunities for Oracle professionals throughout the southeast. The Atlanta OAUG recognizes these sponsoring organizations:

- Matrix Resources provides the conference center space used for meetings.
- Cornerstone Data Systems, Inc. hosts the website.
- Solution Beacon maintains the website content.

The Atlanta OAUG was awarded the OAUG Geo/SIG Certificate of Distinction Outstanding Achievement Award in 2013 for excellence in providing educational and networking opportunities to Oracle users in Atlanta and the southeast.

Visit atloaug.org to review the meeting calendar for the remainder of 2013 and to find out how to become a member of this dynamic group. Oracle users, IT management, consultants and sales/marketing professionals connected to the Oracle marketplace are invited to join.

Contact Andrew Snyder, asnyder@NOODLEit.com, for information about volunteer leadership opportunities.

**Mission Statement:** To provide educational content relevant to today’s Oracle users and IT management in greater Atlanta and the southeast.
Marking 10 Years of Excellence: Geo/SIG Certificate of Distinction Award
Winners Honored at COLLABORATE 13

The Geo/SIG community was outstanding this year in its participation in supporting the OAUG goals of networking, educating and influencing.

OAUG Geo/SIG Certificate of Distinction Award acknowledges the dedication and commitment of the many industry leaders who volunteer their time and effort to bring the excellence of the OAUG experience to the grass-roots level throughout the year.

Through an application process, recipients of the 2013 OAUG Geo/SIG Certificate of Distinction Awards demonstrated their support of the OAUG’s mission throughout the previous year in areas such as:

- Planning and hosting meetings, conferences and training and/or networking events in partnership with the OAUG, Oracle and other groups to provide information sharing and education programs for members.
- Communicating with members through an up-to-date website, newsletter, list server, discussion forum and other media to provide access to relevant educational content, news and other members in the community.
- Assisting other Geo/SIG groups in establishing their affiliated group, implementing effective start-up practices, establishing bylaws and developing other Geo/SIG operational information.
- Maintaining operational standards that promote membership in the OAUG, generating funding from membership growth and corporate sponsorship, ensuring budget responsibility, and ensuring the group’s compliance with the OAUG’s mission, objectives and quality standards.

“The Geo/SIG community was outstanding this year in its participation in supporting the OAUG goals of networking, educating and influencing,” said 2013 Geo/SIG Committee Chair Doreen Fox-Dwyer. “The groups that qualified for the 2013 Certificate of Distinction are excellent examples of what can be accomplished with great volunteers. These volunteers took their regional, industry and product-focused groups to the user community and provided numerous events, webcasts and in-person meetings to enable the users to gain knowledge and have networking opportunities.”


For additional information regarding the awards or the application process, please send an email to geo-sig@oaug.com. Visit the Geos and SIGs web page under the User Communities tab on oaug.org for information about the OAUG’s Geo and SIG communities.
Geographic User Groups

- Atlanta OAUG
- Central States OAUG*
- Florida OAUG*
- India OAUG*
- Latin OAUG*
- Michigan OAUG*
- Nevada OAUG*
- New England OAUG*
- North Central OAUG*
- Northern California OAUG*
- Northern Ohio OAUG*
- Ohio Valley OAUG*
- Southwest Regional OAUG*

Special Interest Groups

- AP SIG
- Assets SIG*
- Configurator SIG*
- Cost Management SIG*
- Database SIG*
- Discrete Manufacturing SIG*
- E-Business Applications Technology SIG*
- E-Business User Management SIG
- Enterprise Asset Management SIG*
- General Ledger (GL) SIG*
- Hyperion SIG*
- Oracle Business Intelligence (OBI) SIG*
- Process Manufacturing SIG*
- Projects SIG
- Public Sector SIG*
- Upgrade SIG*

*Multi-Year Award Recipient

Congratulations to the following 2013 OAUG Geo/SIG Certificate of Distinction Award Recipients:

Your ongoing commitment to excellence in serving the Oracle users community is appreciated.

Need to pull off something amazing with your technology?

Upgrade to Release 12

CSS customers accomplish things they never thought they could by using analysis tools and services from CSS. Understand your upgrade requirements.

Call 800-814-7705 or visit www.cssus.com
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.

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2013 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 (iIOUG)
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*
ORAUG-Brazil
Pittsburgh OAUG
Queensland OAUG
San Diego 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 – 2013 OAUG Geo/SIG Certificate of Distinction Award Recipient

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.
It is rare and refreshing to see a natural leader shy away from the limelight in terms of seeking recognition, but Chuck Armbruster is one such humble leader. While the purpose of the OAUG Member Snapshot is to pay due attention to our deserving candidates that stand out within the OAUG, Chuck mentioned he would be more than okay if we tone down his personal contributions and talk more about why he feels the OAUG is so important for members for this issue of OAUG Insight. Without embarrassing him too much, we’ll do a little bit of both.

As corporate reliability engineering manager for The J.M. Smucker Company, Chuck became actively involved in the OAUG when the company rolled out its enterprise asset management offering five years ago. It was his passion for enterprise asset management that led him to become first involved in the OAUG’s Enterprise Asset Management Special Interest Group (eAM SIG) as customer liaison in 2009 and eventually increased his responsibility as its current president since 2011. Oracle eAM is an Oracle E-Business Suite module that helps manage physical asset management.

“I wanted to promote eAM in the maintenance and reliability community, so this was a natural fit for me to help like-minded peers share tips and tricks and gain knowledge from other experienced users,” said Chuck. “The eAM SIG is an invaluable resource as far as meeting other users and sharing information and best practices on the most effective use of Oracle eAM.” The SIG is transitioning from a consultant-based group to a user-based SIG. While the SIG was founded in 2002 by a consultant group of system implementers, who are still involved with the group today, the SIG is evolving into a pure user group rather than continuing to rely on other commercial entities. The SIG has also evolved in other impressive ways, tripling its size from 2008 to present with approximately 450 active members. Under the current leadership, the eAM SIG was awarded the OAUG Geo/SIG Certificate of Distinction Award in 2012 and again in 2013.

This year, Chuck is an active member of the OAUG Geo/SIG Committee. Additionally, he serves on the eAM Customer Advisory Board, where he enjoys the direct channel for enhancement recommendations and influencing Oracle’s development path for both Maintenance and Supply Chain. He also has been a frequent speaker at several Oracle-based events, such as COLLABORATE, Oracle OpenWorld, Maintenance Summits, Value Chain Summit and Manufacturing Summit.

Chuck has volunteered in a long list of organizations, including the Society for Maintenance and Reliability Professionals, Datastream User Group, Goodwill Industries, United Way Steering Committee, Church Trustee Board, Chamber of Commerce, Habitat for Humanity and Parks and Recreation, among others.

"The eAM SIG is an invaluable resource as far as meeting other users and sharing information and best practices on the most effective use of Oracle eAM."

“Being part of the OAUG has been a meaningful and rewarding experience,” said Chuck. “The networking and educational opportunities are exceedingly valuable to help grow your connections and knowledge base.”

He strongly encourages members to actively take advantage of the many benefits that make up the OAUG membership. Chuck believes it is one of the most economical ways to gain relevant and timely information that will help propel your business forward and make you more marketable in the industry. For someone who makes it a point to become ingrained in the many organizations he helps to grow, he would know.
New and Returning Members

Returning Associate Members:


Returning User Members:

The OAUG welcomes the following new and returning members who joined February 1, 2013, through April 30, 2013.

**New Associate Members:**
- Alpha Corporation
- Clearline Group
- Hyland Software, Inc.
- Image Integration Systems Infrastructure Advisors and Services, Inc.
- PMSOFT JSC
- Rhapsody Technologies, Inc.
- UC4 Software Inc.
- Vivid Edge Corp.
- Wipro Technologies

**New User Members:**
- Accelyrs
- Advantest America, Inc.
- Ag Processing Inc.
- Alere Inc.
- Amalgamated Life Insurance Company
- Asian Development Bank
- Biesse
- BorgWarner Inc.
- Botswana Housing Corporation
- Brasfield and Gorrie
- Breg, Inc.
- Brocade Communications
- Bureau of Engraving & Printing
- California ISO
- CareFusion
- Central Florida YMCA
- City of Atlanta
- City of Omaha/Douglas County
- Colorado Dept. of Labor and Employment
- Creation Technologies Inc.
- Cree Inc.
- Darling International, Inc.
- DataDirect Networks
- David C. Cook
- Discover Financial Services
- Dish Network
- DPR Construction
- Energy Transfer
- Fafinski Mark & Johnson
- Faithful Gould
- FedEx TechConnect
- Fidelity National Information Services
- Genzyme
- Google Inc.
- Hach Company
- Hollingsworth and Vose Company
- IMMI (aka Indiana Mills and Manufacturing, Inc.)
- Integra LifeSciences Corporation
- Jacobs Engineering
- JDS Uniphase
- JELD-WEN, Inc.
- JSC Bank of Georgia
- Landspitali University Hospital
- Lend Lease
- Lidestri Foods, Inc.
- Lozier Corporation
- Lynden Inc.
- Mattel
- Mediacom Communications Corporation
- Metropolitan Washington Airports Authority
- Mitsui E&P USA LLC
- Mol (America) Inc.
- Neiman Marcus
- Newport News Shipbuilding
- Nucor
- ORTHOFIX, Inc.
- Peloton
- PepsiCo, Inc.
- PHT Corporation
- Pomeroy IT Solutions
- ProQuest LLC
- Rackspace Hosting
- Reynolds Packaging Group
- Rheem Manufacturing
- Rockwell Collins
- Rosendin Electric, Inc.
- Savola Foods Arabia
- Select Medical Corporation
- Selective Systems, Inc.
- Senior Aerospace
- Metal Bellows
- Sensata Technologies, Inc.
- Softchoice Corporation
- Southwestern Energy
- Stream
- Sturm, Ruger
- Sunovion Pharmaceuticals Inc.
- TD Ameritrade
- Technip USA
- Tecumseh Products Company
- Terracon
- Texas Biomed
- The Royal College of Physicians and Surgeons of Ca.
- TNT Fireworks
- Topps
- Tyco Integrated Security
- UBS
- UniTek Global Services Inc.
- University of California, Berkeley
- University of Tasmania
- USANA Health Sciences
- UTI
- Wells Fargo
- Western Union
- YMCA of Greater New York

For more information, visit www.oaug.org.
A successful enterprise application delivery hinges on numerous factors, but aligning the project with business objectives from the outset is one of the most critical.
Before any major enterprise initiative launches, it should be “pegged” to executive vision for the future of the organization. Executive vision captures the strategic goals of the company and justifies the assets that will be required to achieve them. These days, information technology (IT) is usually a fundamental component of every business transformation. Alignment of the systems strategy with executive vision is critical for the organization and paramount for success.

Oracle enterprise projects should be treated as transformational business events that drive competitive advantage. They require significant asset, resource and capital outlays – and they demand vision and leadership. At the heart of every successful initiative is an executive sponsor who champions the project and takes ownership of the results. However, even with a strong leader, projects may struggle. While routine technical challenges occur on every project, they are far easier to resolve than critical issues like scope creep and organizational resistance. Experience shows that these pitfalls can be avoided with strong executive alignment.

Enterprise systems should enable strategy. Oracle offers functionally rich solutions that should be evaluated against business needs to determine when, where and what features should be deployed. For example, a company running multiple ERP systems could start with a technical upgrade (from Oracle E-Business Suite [EBS] 11i to R12) as the first step in unifying the ERP platform into a common model. With business strategy focused on growing sales, better utilizing assets and decreasing cost of ownership, the upgrade and post-upgrade roadmap can be defined. EBS R12 makes multi-divisional consolidation possible and serves to standardize supply and demand data for a global view. Consolidating onto a single ERP system translates to a lower cost of ownership. Scheduling the implementation of Oracle EBS R12 Advanced Supply Chain Planning (ASCP) and Demantra in a phased approach after the upgrade would then enhance the organization’s ability to plan supply for global customer demand, thus lowering inventory investments and improving customer service levels. Because the initial upgrade project was attached to corporate direction, a plan for achieving improvements through the upgrade becomes relevant to corporate strategic objectives.

Executive teams need to understand their role in a project so that tactics are driven by strategy. Projects often have multiple goals – reduced days sales outstanding (DSO), lower support costs and better employee retention. By understanding how these goals support the enterprise business strategy, executives from multiple disciplines will see the benefit of collaboration. For instance, corporate HR’s strategic imperative may be employee retention. The IT department may be tasked with lowering annual total cost of ownership (TCO). Oracle Fusion HCM is a cloud-based solution that accomplishes both by providing performance management, succession planning and compensation at a lower annual operating cost. The VP of HR may be thrilled about Fusion HCM functionality, but the CIO is skeptical of a hosted offering because of security concerns. To break through this impasse, the executive project sponsor must educate the leadership team on how Fusion HCM functionality meets staff retention needs while simultaneously delivering lower support costs, high availability and data security through a hosted SaaS model. With an effective project champion, the executive team will align to achieve the business goals that justified the project. By understanding and accepting the goals of a project holistically on behalf of the entire enterprise, the executive team is far more likely to collaborate for the good of the organization.

A successful enterprise application delivery hinges on numerous factors, but aligning the project with business objectives from the outset is one of the most critical. With strategic project alignment, executive teams can more readily understand the dollar investments, timelines, goals and objectives of the project and support its success.
Predictive Analytics: Four Strategies

With the right steps, managers can reap new benefits with forward-looking metrics.

Analysis of historical data has been the staple of traditional business analytics, in which reporting solutions are used to generate dashboards and standard and ad hoc reports to gain visibility into past and present business performance. Despite the success of these solutions, executives are always looking to gain better insight into the future.

Recent growth in available data and statistical analysis tools has improved the role of predictive analytics. While traditional analytics looks for significant patterns in data, predictive analytics takes it a step further, analyzing historical and current data to make predictions about future events. For example, professional sports franchises use past data to maximize future ticket revenue. Online marketers have improved customer targeting by extrapolating from past data to predict how customers will react in the future. Sales managers can use historical data to determine the most optimal future products or territories to assign to each salesperson, and human resources executives can analyze past employee actions to predict which employees are more likely to leave the organization.

Despite the availability of new predictive analytics tools and methods, a Gartner survey indicated that only 13 percent of organizations make extensive use of predictive analytics. Most companies still focus on traditional analytics to support the business.

Furthermore, according to the 2010 IBM Global CFO Study, organizations that run predictive analytics on top of big data will financially outperform their peers by 20 percent or more. With four steps, managers can position themselves to reap the benefits of predictive analytics.
OAUG Vendor Awareness Sessions

RESERVE YOUR SESSION TODAY!

A LEARNING OPPORTUNITY

OAUG associate members have the opportunity to host educational sessions, which are held several times each month. These interactive webcasts provide information about a variety of products and services that complement Oracle Applications. Visit oaug.org and click on the “Partners” tab for details.

If you are an Associate member of the OAUG and would like to host a Vendor Awareness session, visit oaug.org and click on the “Partners” tab, or send an e-mail to keckstein@oaug.com, or call +1 404.467.6936.

OAUG Vendor Awareness Sessions

From MPL5 to Release 12.1
O2Works Consultants have been there every step of the way.

With experience dating back to one of Oracle’s first releases of the Applications, MPL5, O2Works has the knowledge and expertise to be your trusted consulting partner. From installs and upgrades, conversions and rollouts, to end-user training on Release 12.1, our consultants have the technical proficiency and hands-on industry experience needed to make the E-Business Suite work for your business.

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Validated Integration

Oracle Applications

Be sure to ask your software vendors with integration to Oracle Applications if they have Oracle Validated Integration.

With Oracle Validated Integration, Oracle Applications customers can be confident that a partner’s integration has been tested and validated by Oracle as functionally and technically sound, that the partner solution is integrated with Oracle Applications in a reliable, standards-based way, and that the integration operates and performs as documented.

For the most current list of Oracle Validated Integrations, please visit http://www.oracle.com/us/partnerships/solutions/index.html.

1. **Cleanse the data.**
   While big data has offered an immense opportunity to expand analytics, the sheer volume of information and number of datatypes can pose challenges. Data analysis techniques will depend on the type of data – structured (from internal applications), semistructured (from email or social media) or unstructured (from audio or video). Poor data quality is a common challenge plaguing the corporate world. Data cleansing and preparation activities are paramount to the successful execution of predictive analysis.

2. **Acquire and develop talent.**
   The analysis and modeling of predictive analytics require analysts and statisticians with deep expertise in the corporate and operational environment. A McKinsey study found that the demand for analytical talent in the United States could be 50 to 60 percent greater than its projected supply in 2018. Companies can mitigate the risks associated with this talent shortage by identifying potential candidates and providing them with the necessary training.

3. **Update technology tools.**
   In fast-paced markets, companies have to be quick and nimble to capitalize on changing trends or risk losing opportunities. If data analysts and statisticians have to spend weeks or months analyzing data and building the right model to determine the path of action, they are likely to miss the opportunity. Powerful new big data technologies and analytical tools are essential for analysts to rationalize and analyze data more effectively.

4. **Align with business goals.**
   No amount of analytics helps unless data analysts work in tandem with the business and its objectives. The analysts must coordinate with product and sales teams on a regular basis to obtain guidance on prioritizing the critical decisions. An analytics team can be designed as a cross-functional team composed of data analysts and analysts/managers representing business, finance and IT. Strong alignment with the business will increase the odds for success and help secure funding for additional analytics efforts.

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A Lot Can Happen in Two Days

OAUG’s Connection Point® Seminars are unique, two-day regional events designed to help Oracle users gain up-to-date insight through low cost, high impact education and networking.

OAUG Connection Point® – AppsTech
July 30-31, 2013 • Pittsburgh, PA

Presented by: OAUG, Pittsburgh OAUG, and the OAUG Database, Upgrade and ATG SIGs

Focused exclusively on Oracle E-Business Suite technical topics and the key technical aspects required to maintain this complex software, educational sessions at this event will focus on:

- Applications Strategy and Service
- Applications Development
- Business Intelligence/BI Analytics
- Database
- Middleware
- Upgrading

NEW THIS YEAR: Join Mike Swing of TruTek as he presents a half-day pre-conference workshop:
The Oracle E-Business Suite R12.1.3 Technical Upgrade: The Whole Nine Yards. Learn more or register now:

OAUG Connection Point® – EPM/BI/EBS 12.X
October 22-23, 2013 • Washington, DC

Presented by: OAUG, DC-OAUG, and the OAUG Hyperion, OBI and Upgrade SIGs

You are invited to submit a paper for this seminar, focused on implementing, supporting and maintaining Oracle E-Business Suite, Enterprise Performance Management and Business Intelligence Systems between June 20 and July 18, 2013.

View the educational tracks or submit a paper now:

Learn more at cp.oaug.org