

TEKSYSTEMS GLOBAL SERVICES CUSTOMER SUCCESS STORIES

Client Profile

Industry: Appliances manufacturing
Revenue: \$146 billion (parent company)
Employees: 305,000 (parent company)
Geographic Presence: More than 160 countries (parent company)

Implementing Oracle Business Intelligence Applications 11g for a Fortune 500 Corporation

QUICK FACTS

Objectives

- Implement OBIA 11g solution
- Migrate over 60 customizations from old platform to the new system
- Supply client with OBIA expertise and thought leadership, including roadmapping, best practices and processes to meet their business demands

Challenges

- Work with users to gather, understand and communicate requirements
- Rewrite customizations from the previous Informatica-based platform for the new ODI-based platform
- Mitigate risks such as team attrition and undiscovered issues in new technology

Implementation Highlights

- Supported one of the first-ever OBIA 7.9.6.3 to OBIA 11g migrations
- Provided effective knowledge transfer on new technologies via weekly meetings and informal lunch-and-learn sessions and product demonstrations
- Implemented approximately 25 additional customizations after the move to the new platform

Technologies Supported

- JIRA
- Oracle Business Intelligence Applications (OBIA) 11g (11.1.1.7.1)
- Oracle Data Integrator (ODI) 11g (11.1.1.7.0)
- Oracle E-Business Suite (R12.1.3) (Financials, Procurement and Spend, Supply Chain, Manufacturing, and Projects)
- Oracle Business Intelligence Enterprise Edition (OBIEE) 11g

Results

- Successfully migrated from OBIA 7.9.6.3 to OBIA 11g within budget and timeline
- Grew team from 10 resources to 24 resources to enable additional business operations on OBIA and Endeca solution
- Ensured that the client's investment is protected

EXECUTIVE SUMMARY

A Fortune 500 company engaged TEKsystems® to implement Oracle Business Applications 11g and migrate over 60 system customizations from its old platform, as well as implement new customizations.

“ERP Reporting has accomplished a great deal going live today with OBIA 11g. The team had come across a lot of hurdles and took them all head on and found a way to make it work.”

– OSB Data Conversion and Reporting Leader

Client Profile

The client is part of a U.S.-based multinational conglomerate ranked among the Fortune 500. Our client’s division is focused on the manufacturing, sale and service of commercial and home appliances. The client has partnered with TEKsystems since 2012.

Industry Landscape

Technology companies regularly release new versions of their products to ensure the systems are evolving with their customers’ needs and continuing to provide business value. These releases are created with the customers’ interests in mind—with technology that is faster, more intelligent or expandable to more parts of their business. However, the challenges of upgrading, and in some cases re-implementing, these systems can make it a daunting decision for organizations.

When considering the move to a newer system, businesses evaluate the new version’s benefits against the upfront financial investment, as well as the training and education learning curve and change management effects that may occur. Also, as experience using a new technology is usually limited, there may be a lack of vendors or third-

party partners who can assist in these upgrades or implementations.

However, the alternative to undertaking a technology upgrade can be just as costly. Continuing to invest time and money in a dated technology can incur significant long-term risks, such as impacting an organization’s productivity, continuity and systems reliability.

When making the decision to upgrade—or wait—businesses have to consider all of these aspects. Although choosing to be on the forefront of technology may seem expensive, challenging or even perhaps unnecessary, upgrading sooner may actually give organizations the competitive edge of using highly efficient and smart technology while making a cost-effective investment.

Situation

The client, a large Fortune 500 manufacturer, has a high demand and diverse need for business intelligence (BI) and analytics. Because of its vast size, the client favors implementing packaged software solutions rather than building custom solutions, which can be expensive and difficult to maintain, as well as take a long time to develop. As such, the client has aligned many of its systems with Oracle-based products.

The client was utilizing Oracle BI Applications (OBIA) 7.9.6.3 as their enterprise data warehouse and reporting tool because it integrated well with their Oracle E-Business Suite (EBS) system. Although the client was satisfied with Oracle's packaged solution, business demands had required some customizations. The client reached out to Oracle's largest BI partner, TEKsystems to provide two OBIA developers who could offer the skill sets needed to implement customizations.

The client had approximately 60 customizations to their out-of-the-box OBIA solution to meet their specific business requirements. The customizations involved various combinations of reporting, repository and table changes. For example, they wanted ad-hoc reporting involving purchase orders, invoices and invoice hold information. Out of the box, this information could not be viewed together since it involves multiple subject areas at different granularity.

The client had significant demand from internal business users for additional customizations. When Oracle released its new OBIA 11g platform, the client knew it had to consider upgrading now or waiting. Knowing they would eventually have to upgrade, and that it would be more prudent to migrate to the new platform before implementing any more customizations, the client decided to embark on the migration effort.

Although the client was familiar with Oracle technologies, OBIA 11g was a relatively new tool that had completely different underlying text than the previous version. The client needed a partner that was a thought leader with extensive OBIA expertise and resources highly skilled in Oracle products to help them with the migration and implementation, including roadmapping, best practices and processes to meet their business demands. Following implementation, the client would want this partner to help them implement new customizations and support the rollout to their business users.

Partnering with experts would provide the following benefits: improve time to productivity with the new tool, ensure their business users were using a

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single reporting solution and receiving high-quality data with analytical capabilities across functional areas, and offer peace of mind by allowing them to focus on the business solution instead of getting frustrated with the technology changes.

However, finding a partner who could ramp up a team easily, provide on-site resources and offer thought leadership and direction was a challenge in itself—OBIA 11g was still a new solution and there weren't many vendors supporting it outside of Oracle; in fact, this would be one of the first implementations and arguably the largest to date.

Solution

Since TEKsystems was already providing on-site OBIA developers for the client, we understood the client's current customizations and worked with them to understand the new OBIA platform and how the change in the tool's architecture between the two versions would impact implementation and migration. We presented an approach document that analyzed everything being migrated to the new platform and detailed how the customizations would have to be rewritten and remapped due to the underlying data model changes. Our managed services solution for an OBIA development team would not only provide the resources but ensure the final delivery of the solution for the client. We would also provide tracking, project management, and education and knowledge support for the client's team so they could gain competence and confidence in the tool.

Our mix of on-site and off-shore resources would

include a solution architect and project manager along with strong technical leads and developers. We would concentrate on the technical solution and work with the client's architects and business analysts as a single team. Our management team would review solutions on a regular basis to make recommendations while taking best practices into consideration.

We would implement OBIA 11g and rewrite and migrate their existing OBIA 7.9.6.3 customizations on schedule and without downtime for the business. We would develop and enhance the solution to functional areas not available in the packaged Oracle solution by implementing approximately 25 new changes to the ODI-based technology stack. Our on-site team would work closely with end users for the gathering, understanding and tracking of requirements, as well as present them with the implementation solution and discuss enhancements. We would track all customizations in JIRA, which would enable new customizations to be reviewed and analyzed by various technical and business teams. After implementation and migration, we would test.

We would roll out the 11g solution to small user groups to empower and create confidence with the new tool. We would collect issues or improvement recommendations from business users and based on that feedback, improve the quality. We would also identify new and critical functional areas and implement/build the solution. There would be

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informal lunch-and-learn sessions on business needs and technology integration and support.

We would meet with client leadership on a weekly basis to review the technical design solution and recommend best practices and corrective actions, if necessary. TEKsystems management would share experiences on OBIA with client management on a regular basis so the client could take advantage of the successes/failures and prepare accordingly. We would also utilize our proprietary BI accelerator, BI Assurer, to confirm that OBIA 11g would still support the client's upgraded EBS source environment (R12.2.2).

We recognized that there might be some risks with an engagement of this size. For example, attrition of our resources could impact timelines. To mitigate this risk, we would implement cross-training and have back-ups for each critical resource. Also, before the project began we would work closely with Oracle to identify known issues with the technology and start upgrading in demonstration instances well in advance, and then liaise with Oracle developers to resolve any technical issues we discover during the implementation.

The client chose TEKsystems because of our Oracle experience and thought leadership. Our position as an Oracle Platinum Partner and an Oracle Research and Development Partner, and the high-quality resources already on site at the client, demonstrated unparalleled expertise and understanding of Oracle products that could enable the client to do a seamless large-scale implementation of this new technology.

Results

We completed the OBIA 11g implementation on time, including the migration of over 60 customizations from the old version and the implementation of 25 new customizations on the new platform. The implementation was successful, with very few post go-live issues reported. Our solution helped educate the client on the technology, supported the client on the commitments they made to their business teams and helped the client through the technology

change management process. We have rolled out the solution to small user groups across the company, including the client's project and financial analytics team, who are actively using OBIA as their BI reporting tool.

Our team included one administrative resource, four BI analysts and five BI developers skilled in Endeca, ODI, OBIEE and/or Informatica. An analyst and a developer were located on site at the client and interacted with end users to gather and communicate requirements. The rest of the team was located at our Hyderabad Solution Center, where the majority of development occurred.

The conversion ensured that the client's investment is protected. Environments grow increasingly complex over time. For example, at the time of implementation there were already over 60 customizations on their old platform; currently there are 85—and that's in addition to out-of-the-box features. Also, before we implemented 11g, they were utilizing only five EBS modules; now they have more than 12. Because of its growing complexity, the client saved significant time and effort by choosing to implement the new platform when they did.

We were also supportive of the client's interest in learning more about different Oracle technologies. Based on requests from users, we conducted several demonstrations. For example, there was a newer set of users who wanted a demonstration of the Supply Chain Management module. We delivered a presentation of the software out of the box, as well as answered questions on pricing. We regularly shared Oracle products and answered specific questions for business users who were either new to or familiar with Oracle and BI.

After the technology went live, we added more analytics and reporting options, such as Oracle Order Management, shipping, billing and Oracle Trade Management Analytics. These functions were previously housed on legacy applications that were not EBS-based. This work, along with the OBIA implementation, is part of the client's overall initiative to move all legacy reports onto OBIEE, a reporting tool based in EBS, so that reporting is more streamlined and integrated across the business.

The client was very satisfied with our performance and has further engaged our team to migrate more legacy systems to EBS, as well as ongoing order, shipping and billing (OSB) development and Oracle Endeca Information Discovery work. Our team supporting the client has now grown to 24 resources.

Key Success Factors

- **Quality of resources.** Our team included a mix of technical and functional experts. On the technical side, our extraction/transform/load (ETL) and BI groups were experienced in both of the underlying data models, Informatica (10g) and ODI (11g), which helped in the analysis and planning for the migration of customizations to the new system. Functionally, our team had worked on the modules previously, which made it easier to validate that what we were doing was correct.
- **Team engagement.** We had two resources on site that interacted closely with end users to understand their requirements, gather feedback and resolve issues. What happened on site was passed to the off-shore team through an effective knowledge-transfer process. The integration of our resources with the client's team members was seamless. Our off-site resources, located at our Hyderabad Solution Center, were close to the client's off-shore location, also in Hyderabad. This improved processes for reviewing the work we were doing, such as designing documents, migration and coding, and also helped our team adapt to the client's culture and processes. Additionally, we had a weekly status review and report to remain on track, held lunch-and-learn sessions to improve user understanding and confidence on business needs and technology integration, and supported the client on strategy roadmapping for current and future Oracle technologies.

- **Client leadership.** The client's leadership team believes that they can and have to update and evolve with the times. Very few companies have implemented this software yet—our client is one of the first to do it because they had the confidence to believe they could. Since the technology was so new, the client asked a lot of questions and sought to truly understand it, and our Analytics Services team was able to support them in this educational component. We also set an aggressive timeline to meet the client's desired go-live date, and due to the complexity of the migration and it being one of the first migrations to Oracle 11g, this engagement was an achievement for all who were involved.

ABOUT TEKSYSTEMS®

People are at the heart of every successful business initiative. At TEKsystems, we understand people. Every year we deploy over 80,000 IT professionals at 6,000 client sites across North America, Europe and Asia. Our deep insights into IT human capital management enable us to help our clients achieve their business goals—while optimizing their IT workforce strategies. We provide IT staffing solutions, IT talent management expertise and IT services to help our clients plan, build and run their critical business initiatives. Through our range of quality-focused delivery models, we meet our clients where they are, and take them where they want to go, the way they want to get there.

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