

# 24 X 7 Operations For A Global Company

## Running Oracle® E-Business Suite

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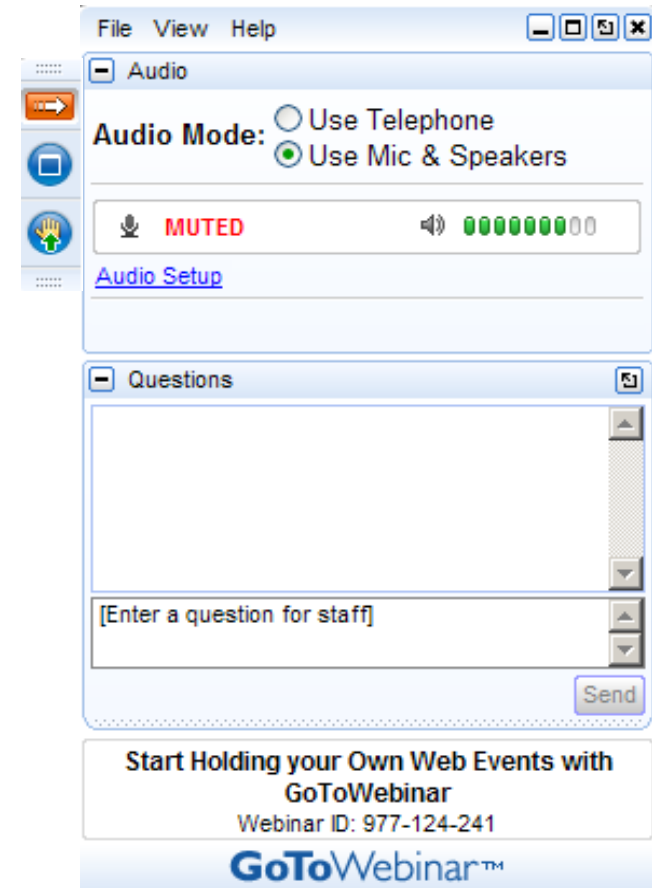


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# Webinar Mechanics

- Open and close your panel.
- View, select, and test your audio.
- Submit text questions.
- Raise your hand.
- Q&A addressed at the end of the session. Answers will be posted within two weeks on our new LinkedIn Group, EBS Answers:  
<http://www.linkedin.com/groups/EBS-Answers-4683349/about>
- Everyone will receive an email within 24 hours with a link to view a recorded version of today's session.
- Polling questions will be presented during the session. If you want CPE credit for this webinar, you must answer all of the polling questions.



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# Learning Objectives

After this session you will be able to:

- **Objective 1:** Explain the mechanics of running a single global instance of Oracle E-Business Suite.
- **Objective 2:** Detail the common business processes and how they are implemented.
- **Objective 3:** Explain how a global company can apply patches and perform maintenance in a very short cutover window.



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# Agenda



## Introduction



## Globalization Processing

- Incentives and Drivers for Corporate Globalization
- Challenges Around People, Process, and Technology in a Globalized Environment
- Advantages of Single-Instance-Single-COA



## Globalization Best of Breed – A Case Study on Experian

- Global Finance Transformation
- Supporting Change with a Global Instance of EBS
- Experian's People, Process, and Technology
- Pain Points, Mitigation, and Lessons Learned



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# Introduction: Finished but not Done

## *e*prentise<sup>®</sup>: Transformation Software for E-Business Suite

*Company Overview: Established 2006 • Helene Abrams, CEO*

### *e*prentise Can...

-  Consolidate Multiple EBS Instances
-  Change Underlying Structures and Configurations
  - Chart of Accounts, Other Flexfields
  - Inventory Organizations
  - Operating Groups, Legal Entities, Ledgers
  - Calendars
  - Costing Methods
-  Resolve Duplicates, Change Sequences, IDs
-  Separate Data

### ...So Our Customers Can:

-  Reduce Operating Costs and Increase Efficiencies
  - Shared Services
  - Data Centers
-  Adapt to Change
  - Align with New Business Initiatives
  - Mergers, Acquisitions, Divestitures
  - Pattern-Based Strategies
    - Make ERP an Adaptive Technology
-  Avoid a Reimplementation
-  Reduce Complexity and Control Risk
-  Improve Business Continuity, Service Quality and Compliance
-  Establish Data Quality Standards and a Single Source of Truth



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# Introduction

Bob Von Der Ahe, *Global Corporate Systems*



Global information services group with operations in 41 countries



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# Experian – A Snapshot



 **Sales:** \$4.5 billion

 **Profits:** \$1.2 billion

 **Employees:** c. 17,000

 **Offices** in 44 countries

 **Largest markets:** US, UK, Brazil

 **Corporate headquarters:** Dublin

 **Main offices:** London, California (US), Nottingham (UK), Sao Paulo (Brazil)

 **Listing:** London Stock Exchange

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# Experian<sup>SM</sup> Company Overview

## Global Business Lines

- **Credit Services** – enables organizations to manage the risks associated with lending money
  - 16 consumer credit bureaus & 12 business credit bureaus.
- **Decision Analytics** – helps organizations with large customer bases to manage and automate huge volumes of day-to-day decisions
- **Marketing Services** – helps organizations to target and engage customers effectively, improving returns on marketing investment
- **Interactive** – enables consumers to manage and protect their personal credit files, and to make more informed online purchasing decisions



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# Information Systems in a Growing Company



Information (data) follows the fundamental law of entropy

- An organization's complex IT systems like E-Business Suite (EBS) become more complex as a company grows



Companies evolve

- The larger the organization, the more likely it is for operational or reporting errors to cause major problems due to a lack of alignment between ERP systems and business process changes that have occurred.



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# The Problems



Common business functions develop different processes due to heavy corporate growth

- Generally due to lack of governance policies and procedures or poor administration of them
- Redundant processes and data have high costs in terms of both time and additional people resources
- When a company strategically eliminates redundant processes and data, their use of redundant hardware diminishes, the quality and timeliness of business information improves, and its people are able to collaborate in a more streamlined manner



IT has a significant impact on the bottom line because operating, maintaining, and synchronizing an array of E-Business Suite instances, charts of accounts, calendars, and other configuration items is time-consuming, expensive, error-prone



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Incentives and drivers for getting to a single, global instance

# Global Scaling And Evolution



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# Incentives & Drivers of Global Operations



- 🐘 Consolidate repetitive data-centric processes to support migration to a shared services center or a centralized data center
- 🐘 Generate financial reports directly from the system of record
- 🐘 Reduce operating and maintenance costs to improve the bottom line
- 🐘 Create a single source of truth to improve business processes and business intelligence
- 🐘 Enable revenue optimization whenever and wherever possible to improve the top line
- 🐘 Capitalize on enterprise-wide synergies to leverage purchasing and to better understand customers
- 🐘 Obtain access to new markets and the opportunity to scale the business

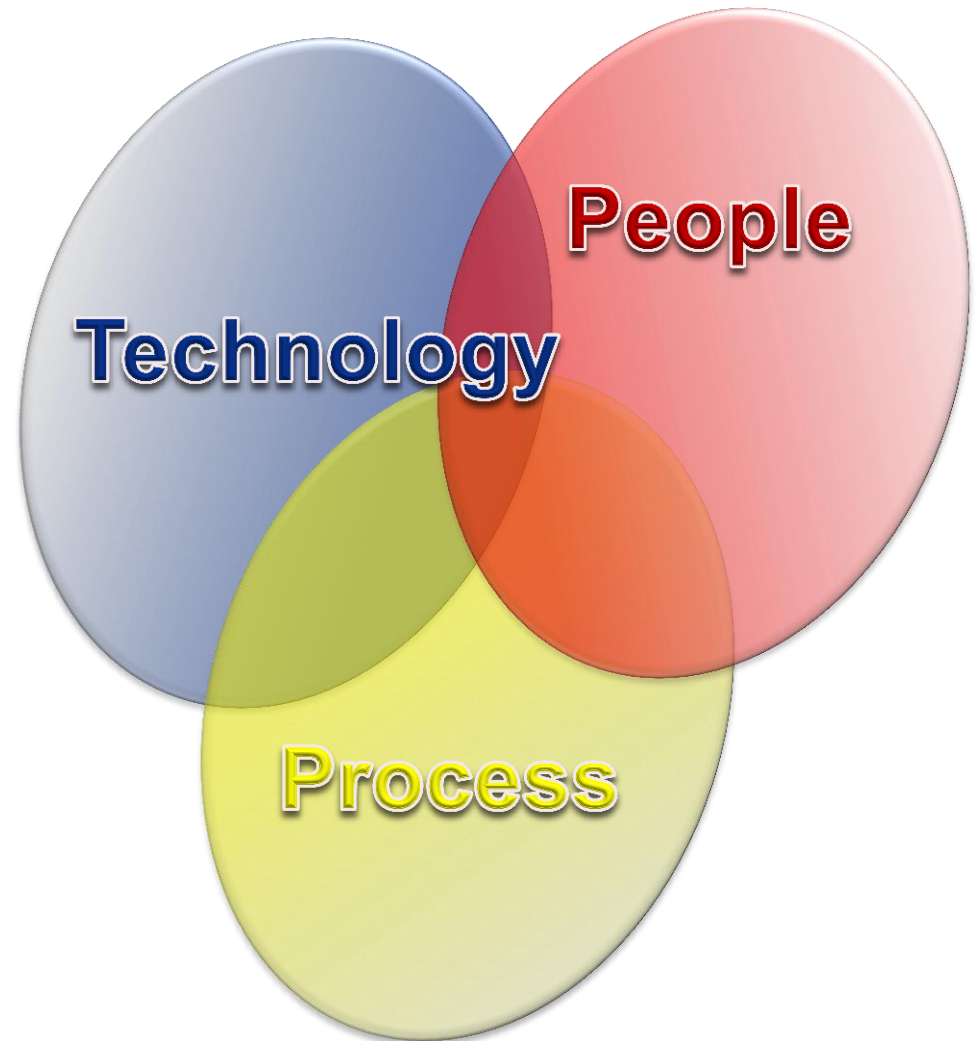


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# Business Process Standardization

*Key components to  
successfully managing  
change on a global scale*



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# Governance



Effective management of shared enterprise assets is necessary for an effective global strategy

- Collaboration
- Implementation of effective controls



Idea of the “benevolent dictatorship”

1. *There can be no wavering about where the finish line is placed (a single global instance)*
2. *Anything less than success or short of completion is not acceptable (no special exceptions)*
3. *Obstructionism is not tolerated*




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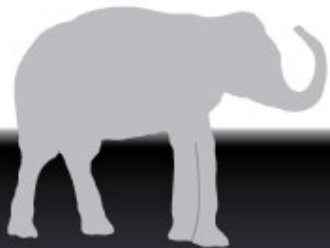


# Training and Communication

 Effective globalization training has to take a more personalized approach that seeks buy-in along with providing information

- New skills
- New processes
- New functionality
- New regulations

 A training manual alone is not enough to be effective




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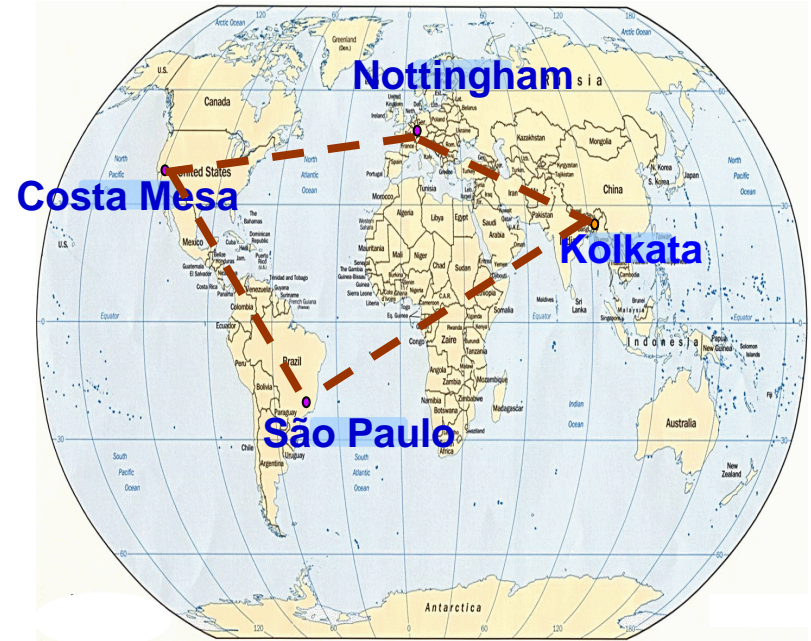
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# Process Standardization

***The backbone of a globalization effort is the understanding that business processes are intrinsically linked and not confined to departmental, geographic, or organizational boundaries.***

 **Shared services center** as a way to standardize on common “global” processes such as:

- Corporate treasury
- Invoice processing
- Receivables processing
- Sarbanes-Oxley Compliance
- Account maintenance
- Corporate reporting
- Expense processing
- HR maintenance




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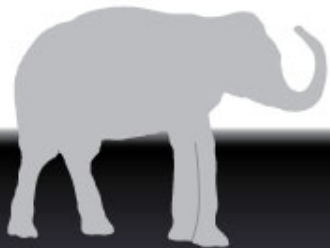
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# Building a Globalization Strategy

 Achieving a global EBS platform relies on:

- An ability to access quality information
- Recognizing the role of technology in the successful integration of the enterprise
- Laying the groundwork for different parts of the business to become integrated with core business processes and decision-making.

 Though IT is core to enabling a global ERP, it is the human component – leadership, communication, and governance – that drives its success and delivers results.



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# Experian Globalization Process

## Operating Principles of Experian's Global Financial Shared Services Center (GSSC)

- **Standard processes and controls** will be implemented across the globe
- **Processes will be consolidated** where possible
- **Local legal requirements** will be incorporated to all processes
- **SSC** should undertake as much processing work as possible
- **Financial models should include the cost of Oracle software** and the cost of migrating to the SSC



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# Experian's Shared Services Strategy

## Reduce costs and improve efficiency

- Leveraged low cost locations and standardized on global business processes
- Eliminated redundant efforts that were common when many corporate procedures such as month-end close and expense reimbursement were regionalized

## Create additional capacity for growth

- Reduced operational complexity
- Opportunity to capitalize on Experian's connection to a diminished number of entities (financial institutions, bank accounts, vendors, etc.)
- Made the roll out of global process automation a realistic opportunity



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# Experian – Global Finance Shared Services

Finance Process	Kuala Lumpur	Nottingham	Santiago
Accounts payable and travel expenses	✓	✓	✓
Accounts receivable and credit collections	✓	✓ excl. Norway	Costa Mesa
General ledger	In-country	✓ UK only	✓
Payroll	outsourced	✓ UK only	Costa Mesa
Billing	✓	✓ some UK/I	Business units
Fixed assets and depreciation	✓	✓	✓
Intercompany processing and reconciliation	✓	✓	✓
Cash management / bank reconciliations	✓	✓	Costa Mesa

## Current Transaction Processing Scope

- Global coverage of some processes only (AP, Travel expenses etc)
  - Opportunities to take on similar activities in other countries / regions
- Regional delivery of all processes
  - Opportunities to centralise key processes globally
- Scope currently limited to “traditional” routine transaction processing activities
  - Opportunity to take on additional more complex activities

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# Experian – Global HCM Services

HCM Process	Costa Mesa (Americas)	Nottingham (UK / EMEA)	Other
Core Human Resources	✓	✓	✓
Employee Self Service	✓	✓	✓
OTL	✓	✓ UK only	✓
Payroll	NA Only✓	✓ UK only	Outsourced
Compensation Work Bench	✓	✓	NA
Adv Benefits	✓	✓	Outsourced
Talent Acquisition	✓	✓	NA

**Current  
Transaction  
Processing  
Scope**

- Global coverage of some processes only (Core HR and Self Service)
  - ↳ Opportunities to take on similar activities in other countries / regions
- Regional delivery of all processes
  - ↳ Resources aligned to regional headquarter offices


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# Technology

 Four main technology issues surrounding globalization:

- Availability
- Access/Security
- Performance
- Functionality

 E-Business Suite Release 12 is designed to support a global enterprise **within a single instance**, and it has several features that enable sharing of data and facilitate the globalization effort.



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# A Single, Global Instance



A single global instance means:

- Higher volumes
- Longer batch processing time windows
- More network traffic
- Longer backup cycles
- Longer test cycles



Substantial  
infrastructure  
expenditures






**BUT**, having several instances and systems multiplies the cost (licenses, hardware, staff) and introduces a different complexity in reconciling and synthesizing corporate information.



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# A Single, Global Chart of Accounts

-  R12 includes major advances in its accounting engine
  - Single engine manages all posting activities into GL
  - Subledger accounting
-  Other new features provide extended functionality, making it simpler to perform financial consolidation as well as to remain in compliance with statutory and regulatory requirements
  - Primary and Secondary ledgers
  - Ledger sets
-  A single chart of accounts enables companies to take full advantage of these new R12 features.

- Accounting policies are standardized across the entire enterprise
- Data remains consistent and has full drill-down and roll-up capability, auditability, and visibility into all of the activity for the entire ledger set
- Conversions not required for data warehouse queries
- Facilitates the movement to a shared service center
- Increases the level of enterprise governance and control of new code combinations

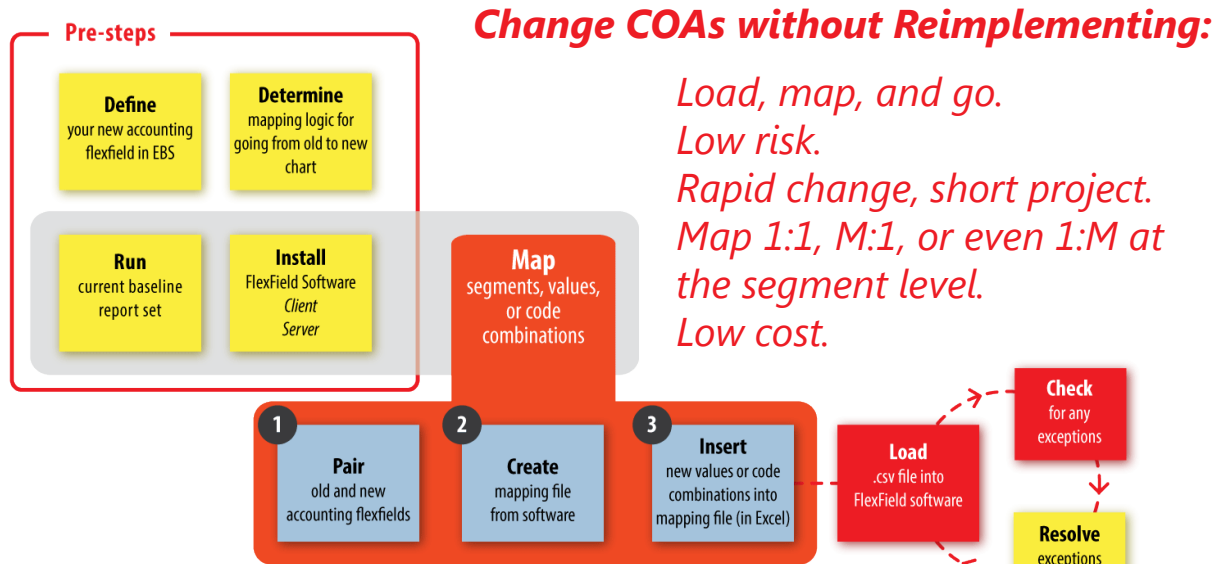


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# eprintise FlexField® Software

Why is FlexField® the industry-leading solution for changing the accounting flexfield?



*Change your Oracle chart of accounts as often as your business changes.  
Model multiple iterations of your chart of accounts to facilitate design.  
Map many charts of accounts to one new one.  
Retain all history.*



- Designed for the business user.
- Built-in features automatically update related information to maintain the relational integrity among data.
- Error-checking that identifies exceptions and alerts the user, even across multiple COAs.
- Simple graphical user interface that takes you through the FlexField process.
- Out-of-the-box software to meet any requirements, whether it is adding or reducing the number or size of segments, mapping 1 segment to many or many segments or values to one, or re-ranging values.
- Retains all history, allowing for streamlined reporting and complete, consistent, and correct information.

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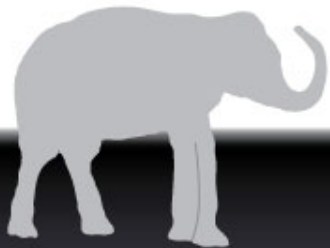
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# Technology - Availability



Prearranged level of operational performance during a period of time

- Service level agreement or "three nines"/"five nines"
- To a user, it means the ability of the user community to access the system
- Scheduled vs. **Unscheduled** downtime
  - Maintenance
  - Patches, configuration changes, etc. (reboot required)
  - **Hardware/software failure**
  - **Environment anomaly**



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# Experian – Three Types of Availability



## Support

- Break-fix and statutory/critical patches to EBS
- 3-tier service level agreement (SLA)
  - Each tier corresponds to the estimated amount of resources and time required to resolve issue
  - Pre-determined acceptable amount of scheduled downtime



## Change request

- Simple change
  - Requires less than ten support days to implement (e.g. minor functionality modifications)
  - Included as part of existing SLA, regression testing not required
- Planned change
  - Requires more than ten days (e.g. major development, acquisitions, projects, upgrades, etc.)



## Release management

- Regular updates to system
- Large portion of planned downtime
  - Better control of User Acceptance Testing (UAT) and Regression Test Bed (RTB) cycles to enhance quality and reliability of releases
  - Optimal use of environment and DBA resources – close coordination with DBA and infrastructure teams
  - Central coordination of release and environment management activities to improve process efficiency



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# Technology, Continued

- 🐘 Access/security
  - Governance and processes
- 🐘 Performance
  - Higher volumes and processing time windows
- 🐘 Functionality
  - EBS
    - Ledgers, ledger sets, MOAC, accounting engine



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# Experian Technology Issues / Pain Points

Issues Faced	Mitigations
Availability / Support	
<b>Maintaining 24x7 uptime</b>	<ul style="list-style-type: none"> <li>• Global Agreement made to “Planned” hours of operations and set hours for outages</li> <li>• Substantive PRODUCTION and DR infrastructure housed / maintained in data centers</li> </ul>
<b>Global Support / Help Desk Presence</b> (24x7 support)	<ul style="list-style-type: none"> <li>• Co-Located regional support teams in major regional centers</li> <li>• Follow the sun; Multi-Shore support locations (Americas / Europe / India)</li> <li>• Single Global Incident tracking system (USD)</li> </ul>
Performance:	
<b>Concurrent Request Monitoring</b>	<ul style="list-style-type: none"> <li>• Centralized recurring jobs (interfaces/reports etc...) to a standardized CONCJOB user –monitored by Global Support <ul style="list-style-type: none"> <li>• Support is best qualified to manage ConcMgr usage, capacity, and job conflicts</li> </ul> </li> <li>• Distribute business critical assignments to key business user</li> <li>• Made the business accountable for</li> <li>• Goal is to move all to defined Monitoring group, use automated monitoring tool</li> </ul>

# Experian Technology Issues / Pain Points

Issues Faced	Mitigations
Access / Security	
<b>Configuration Access:</b> Conflicts occur on what is an “allowable” system change vs. what types may be intrusive, and who can implement	<ul style="list-style-type: none"><li>• Changed evaluated between GPO / SME’s, prioritized and characterized. Potential intrusive change requires UAT and Regression Testing activity (include SM signoff)</li><li>• Created defined EBS “SuperUser” responsibilities for targeted deployment</li></ul>
<b>EBS Applications Responsibility Growth (A runaway train):</b> Combination of 30+ countries, 4 languages, and 5 major business threads	<ul style="list-style-type: none"><li>• This is still a Work in Progress</li><li>• Assigned GPO and SME resources to subject areas</li><li>• Leveraging Oracle GRC functionality to identify potential responsibility candidates<ul style="list-style-type: none"><li>• Retrofitting / consolidating responsibilities based on SCC use or general user designation</li></ul></li></ul>



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**A Case Study on Global Finance Transformation and Operations  
at Experian**

# Globalization Best-of-breed

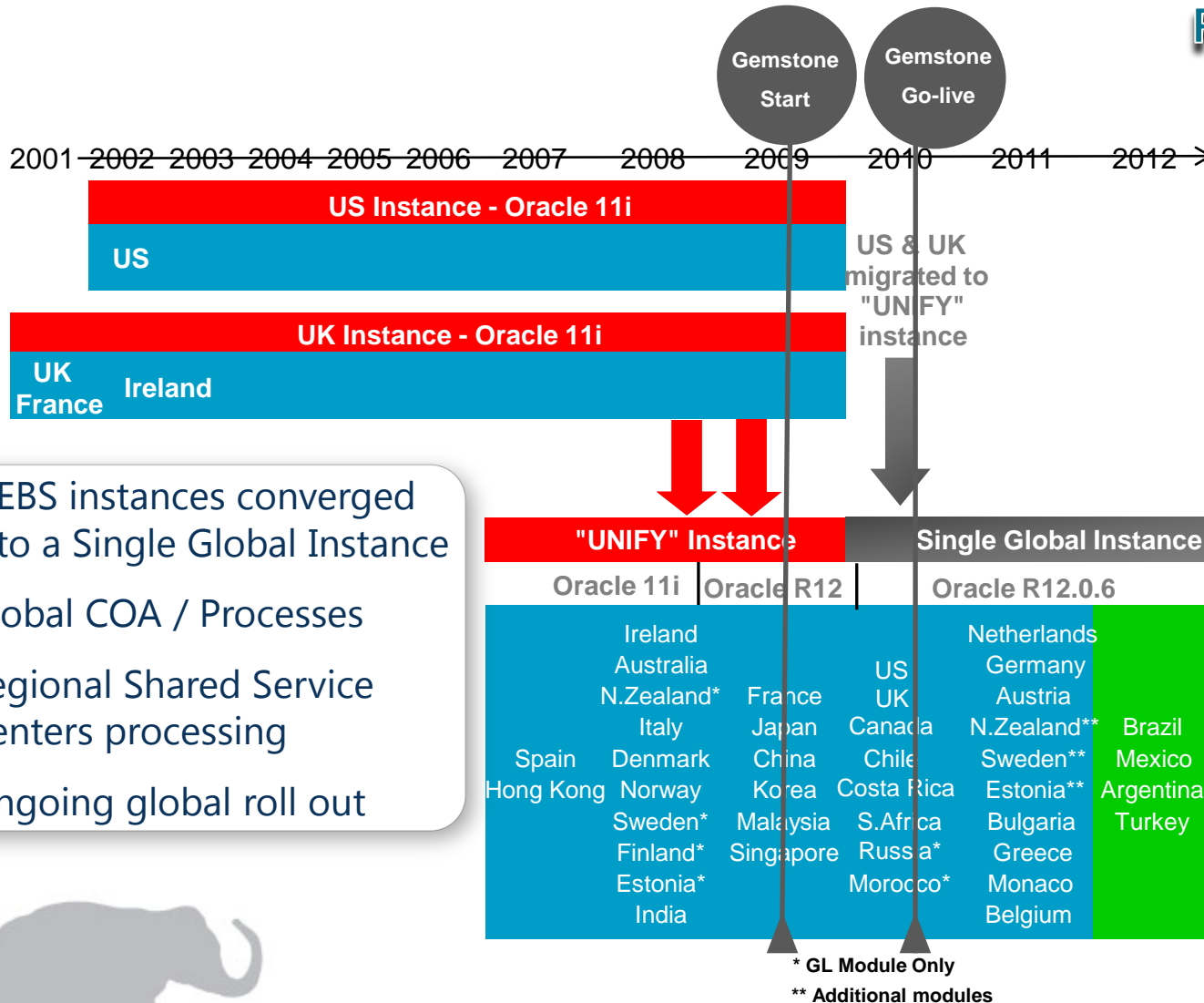


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# Experian – Global Finance Transformation

## Project Gemstone Goals



- Single Global Instance of Oracle EBS R12
- Global Chart of Accounts
- Standard Finance Processes
- Global Finance Shared Services Organisation
- Three regional Finance Shared Service Centres
- Global Hyperion EPM & OBIEE fully integrated with EBS
- Global Finance Center of Excellence (COE)

- 3 EBS instances converged into a Single Global Instance
- Global COA / Processes
- Regional Shared Service Centers processing
- Ongoing global roll out



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# Experian – Global Finance Transformation

Oracle EBS – Modules implemented and planned \*

Core Financials	Other	HR & Payroll
Purchasing	Order Management	HRMS
I-Procurement	Advanced Pricing	Self Service HR
Payables	Service Contracts	Passive Payroll
Receivables	Project Billing	Payroll
Advanced Collections	Time & Labour	Advanced Benefits
General Ledger	AME	Absence Management
Fixed Assets	BRM Billing *	I-Recruitment
Cash Management	Oracle GRC	
AGIS		
I-Expenses		



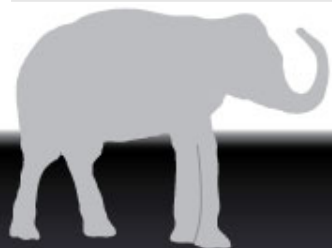
*Note: Not all modules used by all countries*  
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# Experian – Global Finance Transformation

## EPM/OBIEE – Modules implemented and planned

EPM	OBIEE	Planned
Hyperion Financial Management (HFM)	General Ledger Analytics	Workforce Planning
Hyperion Essbase	Payables Analytics	CapEx Planning
Hyperion Planning	Receivables Analytics	OBIEE Dashboards
Data Relationship Management (DRM)	Procurement and Spend Analytics (Purchasing, Requisitions, Internet Expenses)	Noetix
Financial Data Quality Management (FDQM)	Supplier Performance Analytics(Purchasing, AP)	
Hyperion Shared Services		
Financial Reporting Studio		
Smartview		
Workspace		



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# GCS Support – Then and Now

(an Iterative Process)

## EBS Support (Prior to Gemstone)

- **3 Regional EBS instances.**  
Two located in UK, one located in USA.
- **2 Regional support areas**
  - Functional / Development teams in each location
  - Break fix team in each location
  - Different support models in place
  - Knowledge base decentralized
- **3 different EBS infrastructure footprints**
- **Duplicated DBA teams**
- **Strategy and Support leadership silo'd and duplicated**



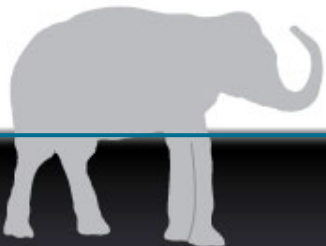
## EBS Support (Gemstone Go Live)

- **Consolidation project to move from 3 EBS to single global instance, infrastructure located in UK**
- **Outsourced Break/Fix support to support partner (TCS)**
  - Experian Development FTE's reduced
  - Support presence included 3rd shore (offshore center in Kolkata, India).of support to a 24x7 model
  - Support management centralized, global incident system implemented
- **Built out EBS Regression Test Bed platform**
- **Began formal Release Mgmt process to include instance and DBA resource utilization management**



## EBS Support / Strategy (Gemstone 2yrs old)

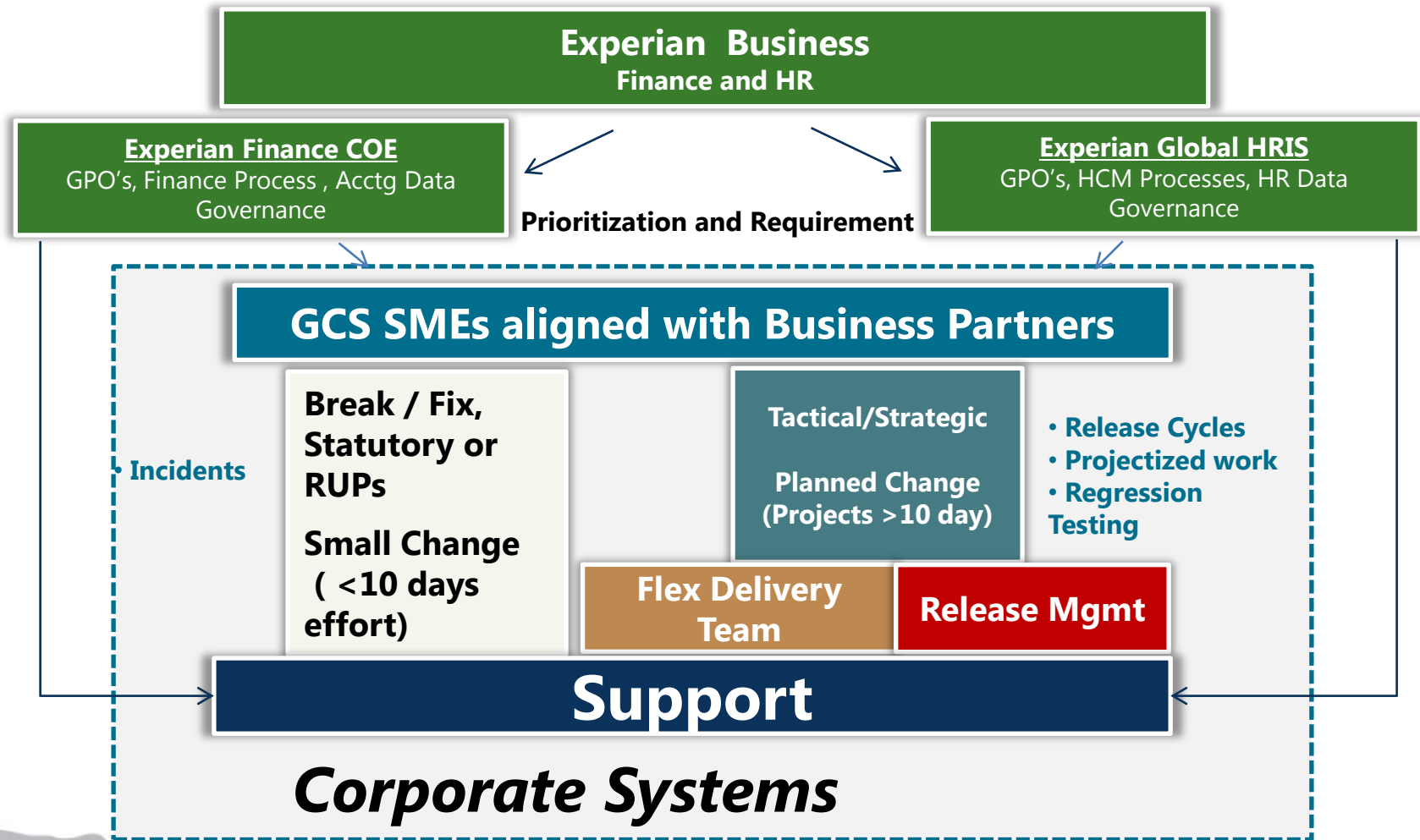
- **Outsourced Support Model transitions to Service Level Agreement (SLA) basis**
- **Formal Change Process put into effect – simple change < 10 days, Planned change > 10 days**
- **Release Management process furthered**
  - Instance refresh policy established
  - Configuration Mgmt process furthered, began use of automation tool (i-setup)



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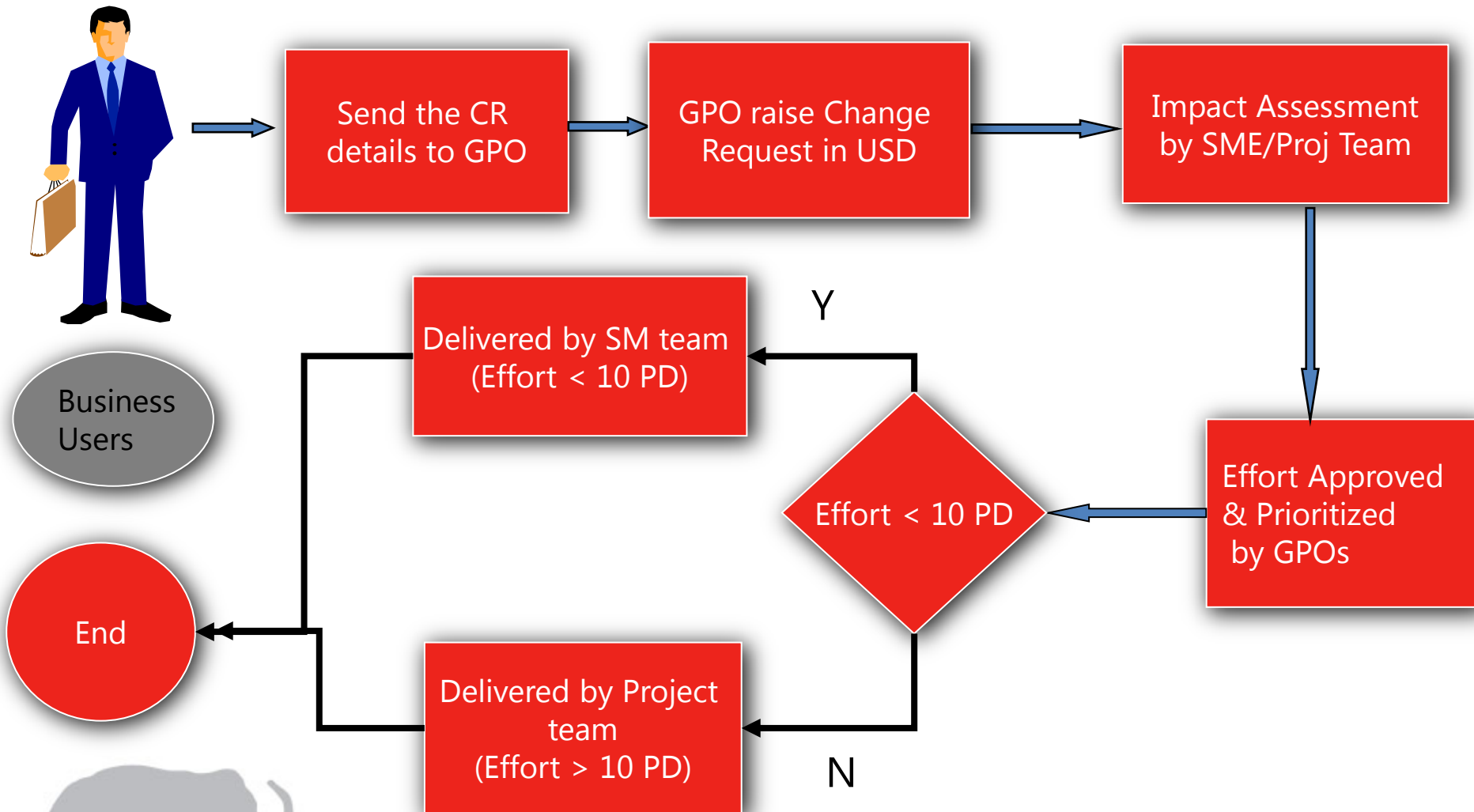
# Global Instance: Business / GCS Interaction



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# CR Management Process



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# Process Collaboration – How Do We Work Together?

## Process Collaboration Matrix

Business Partners			Global Corporate Systems		
Business Process	Process Owner	Process Sponsor	GCS Process Partner / SME	GCS Technology Partner	
				Business Intelligence:  Data Integration / Master Data Management / Middleware:	Data Warehouse / Data Design Authority:
Order to Invoice	NA: TBD	NA: TBD	GCS SME		
	LATAM: TBD	LATAM: TBD	GCS SME		
	UK&I / EMEA: TBD	UK&I / EMEA: TBD	GCS SME		
	APAC: TBD	APAC: TBD	GCS SME		
Invoice to Cash	TBD	TBD	GCS SME		
Recruit to Retire	NA: TBD	TBD	GCS SME		
	LATAM: TBD	TBD	GCS SME		
	UK&I / EMEA: TBD	TBD	GCS SME		
	APAC: TBD	TBD	GCS SME		
Purchase to Pay	TBD	TBD	GCS SME		
Record to Report	TBD	TBD	GCS SME		
GRC	TBD	TBD	GCS SME		
Enterprise Performance Management	TBD	TBD	TBD		



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# Lessons Learned?



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# Questions



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# 24 X 7 Operations For A Global Company

## Running Oracle® E-Business Suite

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Answers from this session will be posted within two weeks on our new LinkedIn Group, EBS Answers: <http://www.linkedin.com/groups/EBS-Answers-4683349/about>



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