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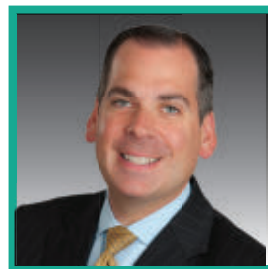


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VP - IT  
Windsor Foods



www.systime.net  
info@systime.net

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# PROFIT

THE EXECUTIVE'S GUIDE TO ORACLE APPLICATIONS

## JD EDWARDS SPECIAL EDITION 2011

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# BACK IN THE USA

Oracle's JD Edwards solutions help United Streetcar get domestic manufacturing back on track

## PARTNER SPOTLIGHT

WTS AND CSS: PUTTING IT ALL TOGETHER

## BEYOND COST

NUCLEUS RESEARCH ANALYST  
REBECCA WETTEMANN ON ORACLE'S  
JD EDWARDS APPLICATIONS

Chandra Brown, President,  
United Streetcar

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—By Alison Weiss



Cover: Bob Morris

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Changing times and technologies offer new opportunities for Oracle's JD Edwards customers.

—By Aaron Lazenby

## EDITORIAL

EDITOR IN CHIEF **Aaron Lazenby**  
[aaron.lazenby@oracle.com](mailto:aaron.lazenby@oracle.com)

MANAGING EDITOR **Jan Rogers**

CONTRIBUTING EDITOR **Blair Campbell**

MANAGING EDITOR, PROFIT ONLINE **Marta Bright**

CONTRIBUTING WRITERS **Carol Hildebrand, Alison Weiss**

SENIOR CREATIVE DIRECTOR **Francisco G Delgadillo**

DESIGN DIRECTOR **Richard Merchán**

PRODUCTION DESIGNER **Sheila Brennan**

CONTRIBUTING DESIGNER **Jaime Ferrand**

## PUBLISHING

PUBLISHER **Jeff Spicer**  
[jeff.spicer@oracle.com](mailto:jeff.spicer@oracle.com)

PRODUCTION DIRECTOR AND  
ASSOCIATE PUBLISHER **Jennifer Hamilton**  
[jennifer.hamilton@oracle.com](mailto:jennifer.hamilton@oracle.com)  
+1.650.506.3794

SENIOR MANAGER, AUDIENCE  
DEVELOPMENT AND OPERATIONS **Karin Kinnear**  
[karin.kinnear@oracle.com](mailto:karin.kinnear@oracle.com)  
+1.650.506.1985

## ADVERTISING SALES

ASSOCIATE PUBLISHER **Kyle Walkenhorst**  
[kyle@sprocketmedia.com](mailto:kyle@sprocketmedia.com)  
+1.323.340.8585

NORTHWEST AND CENTRAL U.S. **Tom Cometa**  
[thomas.cometa@sbcglobal.net](mailto:thomas.cometa@sbcglobal.net)  
+1.510.339.2403

SOUTHWEST U.S. AND LAD **Shaun Mehr**  
[shaun@sprocketmedia.com](mailto:shaun@sprocketmedia.com)  
+1.949.923.1660

NORTHEAST U.S. AND EMEA/APAC **Mark Makinney**  
[mark.makinney@oracle.com](mailto:mark.makinney@oracle.com)  
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MAILING-LIST RENTALS **Contact your sales representative.**

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[profit@halldata.com](mailto:profit@halldata.com), +1.847.763.9635, fax +1.847.763.9638

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# Growing Enterprise



This time last year, we decided to create semiregular special issues of *Profit* focused specifically on individual Oracle application product lines. The premise was that with the increasing breadth of Oracle's product offerings, it's hard to devote enough pages in the regular issue of *Profit* to address the interests of all our readers.

We selected Oracle's JD Edwards as the first special subject because I believed (and this was confirmed by JD Edwards executives at Oracle) that the application's loyal community of users would appreciate the attention—and that the product they used occupied a special, almost niche area in the Oracle portfolio reserved

mostly for certain market segments or industries.

If that was ever true (and I'm not above admitting that it was a figment of my own ignorance), it doesn't sync with what I've learned in the process of editing this special issue. The companies that use Oracle's JD Edwards products come in all shapes and sizes, serving customers across town and all over the world. The solutions they use are deeply integrated with Oracle's overall enterprise systems strategy, and must evolve in parallel with new technologies and new ways of doing business.

Compare, for example, the cover story about JD Edwards customer United Streetcar and the partner spotlight on QubicaAMF. The former is using JD Edwards EnterpriseOne software to focus on domestic manufacturing—the system must be able to source materials from and report information about U.S.-based suppliers to meet “Buy America” requirements. The latter is using JD Edwards World to synchronize parts built in factories all over the globe to deliver a seamless experience for the customer.

And in my interview with Lyle Ekdahl, group vice president and general manager of Oracle's JD Edwards product family, Ekdahl mentions how his team is working on mobile apps to extend JD Edwards functionality beyond the datacenter out to the point of interaction. He also talks about how JD Edwards software and Oracle Fusion Applications are growing closer together, and how Oracle's hardware business will bring new performance benefits to users.

With all this activity, it's easy to see why the JD Edwards user community is excited about the software they use and support. And with all the amazing growth within the JD Edwards team at Oracle, I'm looking forward to the stories we'll tell next year.

**Aaron Lazenby**  
**Editor in Chief, *Profit***  
aaron.lazenby@oracle.com

BOB ADLER



## Extended JD Edwards Services across EMEA

### EMEA wide JD Edwards Projects

When you decide to extend your JD Edwards ERP system to and across Europe, Middle East and Africa you still have to face local business and cultural differences from one country to the other in terms of accounting methods, fiscal reporting, taxation, logistical requirements, language support, legal requirements.

To overcome these obstacles you often end up with a complex and time consuming business relationship with several companies and you are confronted with new problems such as different contacts and different contracts, different skill-levels of consultants, complex project management.

### The Solution

However, meeting your expectations for an efficient roll out and a profitable solution is largely dependent on the consultants' ability to understand the diversity of local markets and cultures, align processes across borders and turn them into a profitable global solution - an expertise difficult to identify in any single company.

With the largest number of experienced local consultants across EMEA, InOne Europe offers you an efficient EMEA wide roll out **with just one cont(r)act**. And for the whole lifecycle of your JD Edwards application, InOne offers you **complete end to end services** – EMEA wide, in each country you need.

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### InOne Europe AG

Rheinstr. 4 E  
D-55116 Mainz, Germany  
Phone: +49 6131 5848-510  
Mail: [info@inone-europe.com](mailto:info@inone-europe.com)  
[www.inone-europe.com](http://www.inone-europe.com)

# Riding to Global Growth

Partnering with SYSTIME, Trek Bicycle Corporation uses JD Edwards solutions from Oracle® to support rapid expansion into new regions.

**E**stablished in 1976 as a small business operating out of a red barn in Waterloo, Wisconsin, Trek grew into a multimillion dollar global enterprise, with sales, purchasing, warranty, warehousing, and finance operations expanding into Europe and Asia Pacific. As the company grew, Trek needed help



Bryan Turner, Trek IT Global ERP Manager

in updating its operational and financial systems to keep pace with the expansion.

Building on their close and trusted relationship, Trek partnered with SYSTIME to implement Oracle's JD Edwards EnterpriseOne 9.0 and their in-house business-to-business system, as well as business intelligence and demand planning. As a result, Trek was able to cut unnecessary costs and build a strong technology foundation for future expansion.

## Obstacles to Growth

Trek Bicycle Corporation is a major bicycle and cycling product manufacturer and distributor under brand names Trek, Gary Fisher, Bontrager, Klein and until recently, LeMond Racing Cycles. Trek bicycles are marketed through 1,700 dealers across North America, subsidiaries in Europe and Asia, and distributors in 90 countries worldwide.

Although Trek was growing successfully, executives had limited abilities to view and analyze the entire global business. The business was spending too much time managing operations on multiple systems, and both time and cost were devoted to updating, maintaining, and synchronizing data. Disparate legacy enterprise resource planning (ERP) applications and a fragmented chart of accounts led to operational inefficiencies, which increased unnecessary costs. In line with its recent expansion into Asia, Trek required an ERP solution for Asia that could be closely integrated with the instance of Oracle's JD Edwards EnterpriseOne Xe that was already implemented in North America and Europe. Flawless master data management and the transfer of financial information from the JD Edwards EnterpriseOne 9.0 system were vital.

## The Selection Process

To aid in the JD Edwards implementation, Trek sought a world-class team with the global expertise to deliver a solution rapidly at a competitive cost. Trek chose to partner with SYSTIME, whose end-to-end approach incorporated Oracle's JD Edwards EnterpriseOne 9.0 in Asia and used Oracle SOA Suite 11g as the integration platform between the JD Edwards EnterpriseOne system and other subsystems used by Trek. Driving superior financial data and supply-chain visibility with accelerated sales along with warranty

support, the JD Edwards EnterpriseOne-based solution from SYSTIME enabled the perfect integration between Trek's business-to-business and point-of-sale systems, business intelligence, and demand planning. It also enabled the solution to be rolled out easily in any new geography.

"One of the key reasons that we determined JD Edwards EnterpriseOne 9.0 was necessary for Trek Bicycle Corporation was the need to get to a current base that was usable globally," says Bryan Turner, IT Global ERP Manager at Trek. "We needed to work with different language sets, as well as localizations, and we wanted to take advantage of JD Edwards EnterpriseOne 9.0's user-friendly interface. It also helps with the integration to other applications that work with the ERP system, because we all know the ERP system is the backbone of any corporation, and needs to work with current technology."

The Trek-SYSTIME team was able to roll out the system to Japan, as the first in a series of Asia Pacific countries, within a very aggressive timeframe, due to its understanding of Japanese localizations and capabilities in the latest technologies leveraging Oracle SOA Suite 11g. Using SYSTIME's Global Delivery Model, the project was controlled end-to-end while incorporating analysis, design, development, conversion, and support. The full suite of Oracle's JD Edwards EnterpriseOne 9.0 modules was implemented successfully through a collaborative, focused change management approach. The leadership of the Trek-SYSTIME team minimized scope creep, with transparency remaining a priority throughout the project lifecycle.

## Reaping the Business Benefits

The Trek-SYSTIME team implemented and integrated JD Edwards EnterpriseOne 9.0 on time and within budget while accommodating Trek's

unique requirements. Trek was able to achieve a number of business benefits as a result of the implementation, which standardized and simplified international business processes.

Trek reduced system maintenance costs by decommissioning its legacy ERP and supporting systems. With a common server and consolidated hardware, the business also saved on application support costs. The business improved sales using JD Edwards EnterpriseOne 9.0's on-hand, committed inventory display features. Trek could accurately monitor manufacturing, sales orders, and inventory while configuring valuable customer information such as preferences and customized discount structures through the advanced pricing module. Strengthening the sales team's capabilities in this way brought higher returns and more satisfied bike dealers.

The Japan sales team was finally able to focus on value-add sales, while JD Edwards EnterpriseOne 9.0, linked to Trek's internal best-in-class business-to-business site, enabled bicycle dealers to place orders on their own. This was absolutely vital to the project's return on investment. This new system enabled Trek to achieve record-breaking sales with no manual intervention required during Japan's Golden Week in May 2011.

In terms of data, when Trek used Oracle SOA Suite 11g, it was able to synchronize master data between the existing JD Edwards EnterpriseOne Xe system in North America/Europe and the new JD Edwards EnterpriseOne 9.0 technology in Asia, driving consistent financial account and product information. In addition, one of team's most significant accomplishments involved eliminating duplicate data entry. The JD Edwards EnterpriseOne solution secured a single point of truth, and Trek expects annual productivity to rise by 10 to 20 percent as a result.

"We have been able to create a global chart of accounts, which allows us to better report on data and also has enabled us to roll out the software to new regions more easily," says Turner. "For example, we just rolled out Sweden within four months, which is unheard of, and it was something that we would not have been able to do without the JD Edwards EnterpriseOne software."

The solution also delivered superior reporting capabilities: Company stakeholders no longer needed to wait for detailed financial information. Following the go live, this data was made available in real time, making accurate sales trend analysis and forecasting possible.

**"Trek had the operations knowledge, and SYSTIME knew how to leverage the best practices for rapid deployment of JD Edwards in eight countries. Together, we created a winning partnership."**

— SYSTIME CEO Vishal Grover

Finally, the solution provided a foundation for future roll outs. Trek eliminated more than 50 percent of its customizations in the service and warranty modules. By leveraging existing functionality within JD Edwards EnterpriseOne 9.0, the business has the ability to upgrade systems in North America and Europe by implementing the model designed for Asia.

### **The Benefits of a World-Class Implementation Team**

Although the IT project was completed on time and within Trek's budget, it did not compromise on quality. SYSTIME was able to leverage in-depth technical expertise, superior knowledge of Asian markets, and its experienced, tested Global Delivery Model. And with Oracle's JD Edwards EnterpriseOne 9.0, the business gained a full suite of modules and a robust ERP system.

"SYSTIME was able to bring several different facets to our projects," says Turner. "Setting expectations and working within budget constraints, their leadership helped us produce solid project plans that we could rely on. We would not be able to achieve the timelines or the project results that we expect without the relationship."

SYSTIME Chief Executive Officer Vishal Grover says Trek and SYSTIME's collaborative approach to the project was the key to its success. "SYSTIME's Global Delivery Model was instrumental in Trek quickly deploying JD Edwards in eight countries in Europe and Asia Pacific. Trek had the opera-

tions knowledge, and SYSTIME knew how to leverage the best practices for rapid deployment specific to each country. Together, we created a winning partnership—one that will mark the beginning of an exciting new future for Trek."

### **Future Plans**

After rolling out Oracle's JD Edwards EnterpriseOne 9.0 in Asia, Trek plans to roll it out globally over the next few years. "JD Edwards EnterpriseOne has been around for so long that it is stable, and it adds value in many ways," says Turner. "Used with Oracle's service-oriented architecture solutions, it plays nicely with all the applications that need to be integrated with the ERP. We feel that JD Edwards EnterpriseOne 9.0 is on a stable curve, and we feel prepared to implement Oracle Fusion Applications down the line."

Turner plans to use SYSTIME as Trek's key service provider within the ERP space, and he believes in SYSTIME's ability to work hand-in-hand with Trek to deliver superior project results. "SYSTIME brought subject matter expertise that we did not have internally, and we added the business knowledge. This made for a solid partnership that delivered a very good solution for the business," says Turner. "If you are looking for a partnership within the JD Edwards space to meet global needs in a cost-effective and timely manner, you will not find a better partner than SYSTIME." ■

## **Contact SYSTIME™**

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# Beyond Cost

## FIVE REASONS CUSTOMERS CHOOSE JD EDWARDS ENTERPRISEONE



At Nucleus Research, we've seen a lot of interesting changes in the midsize enterprise resource planning (ERP) environment over the past few years. As Microsoft has extended the capabilities of its acquisitions, vendors such as Oracle have increased their focus on applications that suit the budget and resource appetites of midsize IT departments. Cost is often a big factor in midsize ERP decisions, and companies have a lot of choices, from vertically focused point solutions to midtier applications to full ERP suites.

As part of Nucleus' ongoing investigation into the ERP strategies of growing midsize organizations, Nucleus analysts looked into the decision process of companies that had moved from a point or midtier application to Oracle's JD Edwards EnterpriseOne. We wanted to learn about their experiences, the factors impacting their decisions, and their perceptions about JD Edwards EnterpriseOne versus other applications. Our findings were published in Report L33, *Anatomy of a Decision: Oracle JD Edwards EnterpriseOne*, which is publicly available on the Nucleus Research Website at [nucleusresearch.com](http://nucleusresearch.com). In short, we found that there were five factors driving decisions to buy JD Edwards EnterpriseOne: functionality, reporting, staff availability, partner and vendor support, and references.

**Functionality.** We found that many customers that chose JD Edwards EnterpriseOne had previous experience with another ERP application and, based on that experience, believed they needed to move to a solution with deeper functionality to support their business processes. More-applicable modules; support for more-complex SKUs and inventory controls; and, more generally, the ability to support future growth were all motivations for choosing JD Edwards EnterpriseOne. In fact, more than one customer considered the investment in JD Edwards EnterpriseOne a way to position for growth—either through acquisition or by being acquired—and felt that having a top-tier system was a big differentiator. Of course, those companies that could take advantage of Oracle Business Accelerators found their capabilities an attractive way to accelerate time to value.

**Reporting.** Old ERP was about recording transactional data. Today's ERP is about being able to analyze that data quickly in a meaningful way to make better decisions for the business. Buyers approach ERP with this in mind, and evaluate how they can extract and report on data as much as on the application

itself. Nucleus found that many JD Edwards EnterpriseOne customers were attracted by JD Edwards EnterpriseOne's reporting capabilities and the ability to rapidly build and deliver reports on current transactional data. Having all operational data in one system, being able to access it via the Web, and being able to use Oracle's business intelligence solutions on top of JD Edwards EnterpriseOne to do even-more-sophisticated analysis were additional reporting advantages perceived by customers.

**Staff availability.** Midsize firms are often challenged to attract and retain qualified IT staff. Companies that have struggled through ERP deployments that need to be implemented, supported, and changed by consultants know the value of having onsite staff with the requisite skills. JD Edwards EnterpriseOne customers felt that it was easier to source and hire effective IT professionals with experience in JD Edwards EnterpriseOne than it was sourcing professionals with experience in other midtier products.

**Partner and vendor support.** ERP does not run on software alone, and companies carefully evaluated vendor investment and vendor and partner support as part of their application decision. Many felt that JD Edwards representatives and their partners had a more professional and complete operation; were more available for ongoing queries if problems developed; and, frankly, did less finger-pointing when a customer had a problem—all leading to better deployments and faster support case resolution. An additional differentiator in the eyes of many customers was the availability of Oracle subject matter experts who would be accessible if they had questions or challenges with JD Edwards EnterpriseOne or other Oracle applications.

**References.** Not surprisingly, we found that references played a strong role in JD Edwards EnterpriseOne customers' decision-making process. Of course, positive references are important, but for JD Edwards EnterpriseOne customers they were often helpful in validating whether functionality in products existed for their specific industry or process, or what was available out of the box versus what might have to be customized (and thus be more costly to maintain).

As midsize companies grow, their enterprise application needs and demands change. We found that companies that chose JD Edwards EnterpriseOne gained greater visibility and control over key business processes and that their investment made them better positioned for the future. <>

REBECCA WETTEMANN is vice president, research, at Nucleus Research.

# The Benefits of a Single Instance

## Yamana Gold achieves efficiency with Oracle® Platinum Partner iSP3's mining industry solution

**Y**amana Gold is a Canadian-based gold producer with several mining properties throughout Latin America. The company has six active production mines, four sites under construction, and a number of other exploration sites in Brazil, Argentina, and Chile. The company expects to expand rapidly as the construction of the new mines is completed.

To manage operations at its mines in Mexico, Argentina, and Chile, Yamana Gold was using Oracle's JD Edwards EnterpriseOne Xe solution. However, each country ran its own instance of the enterprise resource planning (ERP) application, with no integration between instances. Pulling information to create reports or run analytics was a manual, laborious process.

With the help of Oracle partner iSP3, Yamana Gold consolidated its JD Edwards EnterpriseOne ERP application into one instance and upgraded to the latest release, gaining significant cost savings and building a solid foundation for future company growth.

### A Golden Opportunity

Founded in 2003, Yamana has been growing rapidly through development of its own mines and acquisitions of other gold companies. Five years ago, the company's yearly revenue was US\$169 million; today it is US\$1.8 billion.

Yamana was using JD Edwards EnterpriseOne Xe to manage operations at its mines in Chile, Argentina and Mexico, including financials, supply chain planning, maintenance, and human resources. However, with three separate ERP instances running its mines in Brazil, Argentina, and Mexico, operational insight was next to impossible. None of the three offices had visibility into each other's information. Running as if they were separate companies, each location had a separate chart of accounts, and there was no standardization of business processes and key master data between instances.

After working successfully with iSP3 on a prior IT engagement, Yamana Gold executives asked iSP3 to help them consolidate their ERP instances and upgrade to JD Edwards EnterpriseOne 9.0. They wanted access to a centralized, one-source database to facilitate financial information consolidations and drill down to detail. They also sought to lower the cost of managing an infrastructure with three instances by going down to one instance.

### Gaining Business Visibility

Over four months in late 2010, iSP3 implemented iSP3's Accelerated Solution for the Mining Industry

company has access to one single data source, which simplifies financial consolidations, reporting, and analyzing key performance indicators. Users are able to drill down to details online, and data duplication and redundancies have been reduced.

"Users can now focus on valued-added tasks, such as performance analysis, rather than being bogged down by recording and reconciling transactions," says Mannie Baltodano, director of corporate IT applications at Yamana Gold.

### Future Plans

The consolidation provided Yamana Gold a platform for standardizing business processes,

**"Users can now focus on valued-added tasks, such as performance analysis, rather than being bogged down by recording and reconciling transactions."**

*— Mannie Baltodano, Yamana Gold director of corporate IT applications*

for Yamana Gold's single instance. "With many successful mining implementations that we have done utilizing iSP3's latest Accelerated and custom solutions, the combination of industry-leading software, best practices, and rapid implementation methodologies has enabled many of our mining clients to achieve faster return on investment," says William Liu, senior partner at iSP3.

With the new JD Edwards EnterpriseOne release, iSP3 was able to eliminate a large number of country localization customizations in Argentina, Chile and Mexico, as release 9.0 enables them to manage localization requirements, reducing manual reconciliation and month-end tasks. As a result of the consolidation, Yamana was able to centralize IT resources, resulting in better system management and security and significant cost savings. The

which iSP3 is currently implementing. This will increase interoperability among the company locations and further decrease costs associated with manual data consolidation.

"We are very happy with what iSP3 has helped Yamana achieve to date, but we are even more excited about the benefits we will gain as we extend the single JD Edwards EnterpriseOne instance to include all of our sites," says Baltodano. ■

### Contact **iSP<sup>3</sup> solution providers inc.**

For more information visit [www.isp3.ca](http://www.isp3.ca), or contact iSP3 Director of Sales and Marketing Don Hamelin at [dhamelin@isp3.ca](mailto:dhamelin@isp3.ca) or 778.772.4757.

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# Life in the Fast Lane

QUBICAAMF UNIFIES MANUFACTURING PROCESSES TO ADDRESS GLOBAL INTEREST IN BOWLING.

**A** 2010 report from Global Industry Analysts found the international bowling market will grow to US\$10.8 billion by 2015, driven mostly by new technologies. Features such as automatic scoring and special effects are adding new flair to the pins, lanes, and ball returns common in traditional bowling.

As new bowling centers open around the world, demand for the varied components behind an exceptional bowling experience is increasing. QubicaAMF, a leading supplier of bowling equipment, brings these pieces together for customers. Formed through the merger of Italian scoring company Qubica and the AMF bowling products group, the company is well positioned to execute high-quality and coordinated delivery of the components required for a new installation or a center upgrade.

With 30,000 stock-keeping units (SKUs), order fulfillment is complex. But QubicaAMF also builds and ships products from multiple locations around the globe. “If you’re building a bowling center in France, all of the components related to the scoring will ship from our Bologna, Italy, location,” says Rohana Meade, vice president of information services and CIO at QubicaAMF. “The capital equipment—the pinspotters, lanes, and ball returns—will ship from Richmond, Virginia. Pins may ship from our Lowville, New York, location and shoes from the Rotterdam, Netherlands, location.”

However, postmerger operations were complicated by the fact that various manufacturing facilities were operating with different enterprise resource planning (ERP) systems. These systems maintain inventory and handle shipping

and billing that support the complicated logistics behind delivering a new bowling facility. In the first five months of 2011, QubicaAMF processed approximately 200,000 sales order lines, averaging between 1,500 and 2,000 lines a day.

QubicaAMF recognized significant ROI

chose to upgrade the corporate headquarters to JD Edwards World A9.2 and gradually roll out to the other main locations. This worked well, says Meade, even though the software was new to European staff. Early experience gained at headquarters provided a solid infrastructure and support for later adopters.

QubicaAMF management chose to work with CSS International—a three-time Titan Award winner—to manage the rollout. AMF IT staff has worked with CSS consultants in the past, and the choice of partners was made based on capabilities and cultural fit. “We just really, really liked them a lot and they hit the ground running,” says Meade.

CSS Project Manager Scott Dittmar handled QubicaAMF’s mechanics enrichment area. “They were very open-minded,” says Dittmar, whose

primary responsibility was to assist in analysis of business processes. “None of their systems really talked to each other. This was the first opportunity to bring everything under one umbrella system.”

Meade says QubicaAMF is seeing gains from unified IT—notably, improvements to volume purchases. In the past, five employees might buy the same part from the same vendor, but because that information was not being tracked there was no way to negotiate a discount. With new visibility from JD Edwards World system, Meade anticipates real savings for her company.

“There are probably 200 other examples I could give of things that were pain points for us,” she says. “Now we have the infrastructure in place to move in the right direction.” <>



potential in simply being able to key an order once and let the system automate the entries, Meade says. Consequently, about three years into the merger, a decision was made to deploy a unified, world-wide ERP. This meant choosing between one of the three ERP systems the company already owned, or switching to an entirely new one. Management selected Oracle’s JD Edwards World solution to do the job. “We decided the [JD Edwards] World platform was working very well for us and was running absolutely the most complicated part of our business: the manufacturing piece,” says Meade.

Meade adds that the existing JD Edwards implementation was more than a decade old and heavily customized—and would not support the growing company and industry. So QubicaAMF management



# From Legacy to Cloud

R.L. POLK SHIFTS IT INTO OVERDRIVE WITH A PRIVATE CLOUD JD EDWARDS SOLUTION.

**R**L. Polk & Co. (Polk) is an industry leader in automotive intelligence and marketing solutions. Automotive manufacturers worldwide rely on Polk's global data and business expertise to help them understand their market position, identify trends, build brand loyalty, conquer new business, and gain a competitive advantage. The company's CARFAX reports are used confidently by millions of consumers every year to verify the ownership and accident history before a vehicle purchase.

Based near Detroit in Southfield, Michigan, the company is a process-driven and highly technical enterprise—winning awards for the data its systems collect and present to customers from more than 34,000 datasources.

Despite the technical mastery underlying Polk, the system that ran Polk's back office, based on Oracle's JD Edwards EnterpriseOne applications, was built on an aging hardware platform. "We needed to replace the enterprise server for an application used by Polk offices around the world—23 hours a day, 5 days a week. We had one full-time IT staff member who supported the platform. He's highly skilled and very dedicated, but he was on call to respond if there was any service disruption. From a business perspective, I knew that this created a single-point-of-failure risk," says Deborah Jackson Lum, senior director of business information systems at Polk.

The situation raised a fundamental question for IT staff at Polk: should the hardware platform be hosted internally or externally?

To answer that question, Polk engaged WTS, an experienced provider of hosted solutions for Oracle's JD Edwards EnterpriseOne and JD Edwards World

product families. Seattle, Washington-based Oracle partner WTS focuses on application hosting, managed disaster recovery, and infrastructure as a service for Oracle's enterprise software and complementary products. WTS suggested that Polk outsource management of the JD Edwards platform.



"We stepped back and said, 'Maybe it makes sense to look at a hosted service model,'" says Lum of the guidance she received from WTS. "We were able to leverage the breadth of their expertise in providing operational support whenever we need it. And we avoided the heavy capital investment of a replacement server."

Ward Quarles, director of marketing and communications at WTS, says Polk's situation is not unusual. "Many JD Edwards customers deliver Oracle applications in an operational model that does not provide scalable infrastructure, lacks critical component redundancy, and does not leverage the advantages of virtualization," he says. "If they reach end of life on a key operational component, we will build into their project plan a refresh of that technology. As part of Polk's in-the-cloud model, they're getting the latest

and greatest in terms of technology and operating systems by manufacturers of their choice."

Indeed, the experience that WTS staff has with moving customers to a private cloud platform proved invaluable to Polk. For example, WTS knew that the only way to guarantee secure delivery of sensitive financial data during production cutover would be to hand-deliver it to Seattle from Detroit. And if the first set of tapes failed, a second set of tapes needed to be delivered.

"Never in our wildest dreams would we have thought about this," says Lum. "But WTS knew this because of their expertise in doing implementations. And sure enough—that's exactly what happened. WTS built a contingency into the plan, executed against it, and allowed us to complete the conversion on schedule."

Since the system went live in July 2010, Polk has upgraded the tools layer to the latest release and conducted a successful disaster recovery test. Both events went flawlessly. Lum was especially impressed with the partner's ability to identify and plan for the unexpected. "Things we never thought would happen, they'd thought of already," she says. "We went through an implementation timeline that was very reasonable and very aggressive—three months from start to finish."

Now, Lum says that moving to the cloud has liberated Polk's technical team to focus on product delivery to Polk customers—a function that is at the very core of the company's business. And that translates into a bottom-line benefit. "You sleep better at night," she says of the hosted model. That's a benefit that R.L. Polk & Co. can now share with its customers. <>



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# Making Plans for Your Value-Added JD Edwards Upgrade

## How your company can take advantage of the latest trends in Oracle's JD Edwards solutions

**J**ohn Welfare is the leader of Deloitte's JD Edwards practice. Having founded the practice 20 years ago, he has witnessed the evolution of Oracle's JD Edwards family of solutions, amassing deep insight into how they can be used to generate business value. John has 27 years



John Welfare, Principal, National J.D. Edwards Practice Leader, Deloitte Consulting, LLP

of experience in IT-focused management consulting, having spent 25 years with Deloitte. He has worked in a variety of industries, with a strong focus on manufacturing, especially in the consumer business and life sciences sectors. Here he discusses emerging trends and common themes related to JD Edwards solutions and what companies can potentially do to leverage these solutions to create business value.

### 1) What trends have you seen within the JD Edwards ecosystem during the last year?

It has been extraordinarily active both within the existing JD Edwards install base and with new JD Edwards software licensees. Many large global companies that have JD Edwards World or earlier versions of JD Edwards EnterpriseOne are pursuing transformational, value-oriented re-implementations, or “upgrades for value,” as we call them. We are also helping a number of new licensees with their implementations of the 9.x versions of JD Edwards applications. It is exciting to see these clients put the new solution capabilities to use in order to deliver business value in their respective organizations.

From a technical perspective, one dominant theme that we have observed is increasing interest in the “red stack,” or the full Oracle Fusion Middleware solution underlying the core JD Edwards applications. Most of our clients are evaluating it as an option for the technological underpinning of the new instances they are deploying and many are moving in that direction. With the advantages of real-time integration and reusable adapters, many companies are adopting the Oracle SOA Suite as their next-generation integration framework. It's a solution that our clients want to better understand and assess as a cleaner and less costly integration strategy to support their environments of JD Edwards and other applications. Finally, there has been much interest in the Oracle Exadata and Exalogic offerings.

### 2) What sorts of new projects are your clients undertaking these days?

As I alluded to previously, there is a powerful trend toward “upgrading for value.” Many clients are expanding upon the native capabilities of JD Edwards by adding modules from Oracle's “edge” products such as advanced

planning and scheduling, transportation management, product life cycle management and other Oracle products such as customer relationship management as part of their “upgrade for value” initiatives.

Notably, over half of our JD Edwards upgrade clients are also seeking to enhance their business intelligence and data warehousing solutions as part of their overall projects so they can better capitalize on the improved datasets that they will realize from their upgrades. As such, there is a related trend toward global master data management (MDM). Many clients want to implement particularized MDM solutions around product, customer and vendor management — ultimately building new global data marts to support vastly improved management information, that is then accessible via their Oracle BI solutions.

### 3) What should companies consider when upgrading?

There are two very distinct kinds of upgrades. One type is purely technical, and focuses on updating the software instance primarily to stay compliant with maintenance or to replace aging infrastructure. The other type, “upgrade for value,” focuses on much more than just running a lot of technology-oriented routines in the background and bringing a new system up with the same old functionality. This type provides much greater business benefits, and it has the potential to produce significant ROI, which is why we recommend it in the vast majority of JD Edwards upgrade instances. Within many of our clients, the business community is demanding this approach as IT leadership requests funding and executive approval for the proposed JD Edwards upgrade projects.

### 5) How are clients extending the value of the benefits they receive from their JD Edwards investments?

When clients move from older releases to the

latest JD Edwards versions, they stand to gain significantly enhanced functional capabilities from the core JD Edwards software itself. However, they need to know what is there and how to take advantage of it in order to realize true business benefits and value. That is why we try to expose our clients to the various feature/functions that are available in the new release and to help them identify where the most value resides for their specific situations. This typically involves thoroughly examining the business processes and the associated JD Edwards configurations, and then performing a fit/gap analysis that compares the client's needs against the new JD Edwards software's capabilities during the planning phase of the implementation. Through this process, some clients on older JD Edwards versions have been able to rule out hundreds of modifications, which can now be handled by the standard functionality, thus reducing cost and overall IT complexity. Additionally, many are able to work much more efficiently both within their enterprises and with their business partners to yield real-world business benefits, which surpass the costs of their projects many times over.

## 6) What are some common mistakes that you have seen JD Edwards customers make when attempting to refresh and update their JD Edwards footprints?

There are several common manifestations of an overarching theme I would characterize as "underestimation of effort." We have encountered many companies that have started projects with the belief that upgrading their existing instances of JD Edwards applications will be a relatively simple and purely "technical" exercise. As many have discovered, this perception is usually incorrect. Companies that look at the upgrade through a purely technical lens often give inadequate attention to building a business case. As such, they tend to underestimate costs and overlook benefits, which leads to difficulties down the road in getting management and executive support for the full project. Often, they fail to garner funding or business community support

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- The largest JD Edwards implementer in the world, with capabilities in Asia, North America, South America and EMEA.
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  - Business process design for SOX, FDA, IFRS and other regulatory compliance
  - JD Edwards Infrastructure Design and Implementation
  - JD Edwards Tax Configuration, Reporting Design and Tax Benefit Identification
  - JD Edwards Application Maintenance Outsourcing
- Broad collection of tools and accelerators tailored specifically to JD Edwards functions and features.

either before or during their projects, leading to challenges downstream.

Another manifestation of this "underestimation of effort" syndrome is related to change management. By taking a purely technical view, companies often fail to see the need to prepare their user bases and the leadership teams for the change. Even routine upgrades from JD Edwards World or JD Edwards EnterpriseOne will typically involve significant change adoption issues and training needs for the end-user base. There is also a tendency to misjudge the enormous amount of effort required to cleanse, synergize, and rationalize the existing legacy data.

## 7) How can companies steer clear of these common pitfalls?

It is vitally important that the various costs, efforts, and benefits are well understood before beginning the project, in order to diminish misunderstandings and misaligned expectations. This is where tools such as our ValuePrint and Enterprise Value Map can be very helpful. ValuePrint assists companies in their efforts to build a detailed business case, and the Enterprise Value Map matches the JD Edwards ca-

pabilities to specific process improvements that can generate shareholder value, thus providing a means to communicate to leadership regarding the anticipated benefits of the proposed project. This makes funding the project much more palatable to senior management and gets the business community on board with the JD Edwards initiative. ■

## Contact Deloitte.

For more information, visit us online at [www.deloitte.com/us/oracle](http://www.deloitte.com/us/oracle) or contact us:

**John Welfare**  
National J.D. Edwards Practice Leader,  
Deloitte Consulting, LLP  
[jwelfare@deloitte.com](mailto:jwelfare@deloitte.com)

**Mark Twomey**  
National Oracle Service Line Leader,  
Deloitte Consulting, LLP  
[mtwomey@deloitte.com](mailto:mtwomey@deloitte.com)

**Nidal Haddad**  
Global Oracle Alliance Leader,  
Deloitte Consulting, LLP  
[nhaddad@deloitte.com](mailto:nhaddad@deloitte.com)





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# The New Era of ERP

CHANGING TIMES AND TECHNOLOGIES FAVOR ORACLE'S JD EDWARDS CUSTOMERS.

**L**yle Ekdahl, group vice president and general manager of Oracle's JD Edwards product family, has observed two decades of change in the enterprise resource planning (ERP) world. Ekdahl has been in the thick of some of the biggest shifts in enterprise software—from terminal workstations and client/server architectures to internet-based systems and mobile ERP. That perspective, and his close relationship with Oracle's JD Edwards customers, has led him to name our current paradigm “the New ERP Era,” reflecting the pace at which market volatility and technological advances are transforming business. Profit spoke to Ekdahl about that new era, how Oracle is addressing these changes, and the investments his team is making to support JD Edwards customers.

**PROFIT:** Businesses have been dealing with a lot of volatility and budget pressure. How has the JD Edwards community responded to these realities?

**EKDAHL:** There is no doubt that the volatility in the global economy over the last few years has created challenges and put pressure on IT budgets. Still, I think on the whole, the overall marketplace and the community of JD Edwards users have come through this period quite well. I continue to be amazed at the level of creativity and resilience in the customer base.

It helps that JD Edwards is a good solution for companies on a budget. If you look at our cost of ownership, it speaks well to value-based buyers and owners of enterprise systems. With economic shifts people still need ERP, and certainly ERP can help keep costs under control and give managers visibility into the right places to spend their capital.

That said, many customers have seen this period as an opportunity to retool, and we are in a position to make further investments. So we've seen good continued uptake of Oracle-based solutions, both native JD Edwards and those that augment JD Edwards—things like Oracle



Lyle Ekdahl, Oracle Group Vice President and General Manager, JD Edwards

WebCenter, Oracle Business Intelligence Publisher, Oracle Business Intelligence Applications, and Oracle Business Intelligence Enterprise Edition. During this period, customers are looking for ways to get a little more for their money—given that they're under budget pressure, that's to be understood. But we haven't seen any kind of wholesale retrenching.

**PROFIT:** How has the economy signaled, in your words, “the New ERP Era”?

**EKDAHL:** One example is that the new era of ERP proposes a user model that operates independent of necessary ties to the back office. There now must be a set of good deployment options.

The volatility in the marketplace drives the need to deliver functionality at the point of process. Take the explosion in the world of mobility. A lot of that is because you don't have people in office buildings sitting there all day long, putting in transactions for you. That's not something that most businesses can really afford anymore.

In place of the old administrative model is functionality that allows the people actually performing the process to capture and use the data at that point of process. Cloud is certainly a part of

this as well—customers see this deployment option as a way of getting better alignment between their spend and the overall solution.

**PROFIT:** What do you tell people these days, when they ask if it's time to upgrade?

**EKDAHL:** In a word? Yes! Unfortunately, the old era of enterprise systems required people to get far too fixated on specific release numbers and release levels. We're trying to help customers understand that, not just JD Edwards applications, but Oracle products in general are built on a strategy of evolution. The days of big-bang implementations have to end, given the volatility in the marketplace. Customers today more than ever are looking to get value from solutions that are flexible and responsive to the market. The notion that we pour millions of dollars into ERP and then turn our backs on it for 10 years—this has to change.

We're working programmatically to drive cost of ownership, including the cost of movement, down. For example, we're working on solutions that allow our customers to upgrade part by part, system by system, using technical products from Oracle such as Oracle GoldenGate—which helps with synchronization and data replication across release levels. In addition, I've assigned some very bright people on my team to work on an upgrade program and technology office. They are focused on technologies, development, and customer-based programs that help drive down the individual elements of upgrade cost.

I think it's important for our customers to understand that we're making big investments toward simplifying movement from release to release—and improving our customers' ongoing return on investment in our software. In addition, we're making sure we have good, complete solutions that are still flexible and can be modified or configured at

the margin. This is an approach that is consistent with lower upgrade costs. We want to help our customers eliminate the need to do deep customization that locks them into specific release levels.

**PROFIT:** How does this approach dovetail with the work being done on Oracle Fusion Applications?

**EKDAHL:** Oracle Fusion Applications fit directly into this approach. Oracle Fusion Applications–JD Edwards coexistence and Oracle Fusion technology adoption is part and parcel to this strategy of evolving applications, where we will incrementally add capabilities and layer in differentiating value over time.

I have a lot of customers asking me, “OK, so is this the last JD Edwards release, and then I have to go to Oracle Fusion?” No. That’s not the way we see it. We see this as two lines of business that are gradually approaching each other. Initially Oracle Fusion Applications are looked at as additive functionality for JD Edwards, and then over time they can be looked at as a successor. But the key is to minimize technical discontinuity.

I hope, however, that it is clear to customers that the JD Edwards EnterpriseOne 9 strategy is the milestone where customers can truly start working toward and benefiting from Oracle’s evolutionary applications approach.

**PROFIT:** Will the momentum behind Oracle Fusion Applications change the way JD Edwards applications look?

**EKDAHL:** We’ve seen a lot of changes in user interface over the last several years. Today, people coming to the workforce have a different view of enterprise systems; many don’t know what to do with an old forms-based application. They’re used to working in an internet-based age. So enterprise systems have to take on some of that more “consumerized,” if you will, look and feel.

This is where JD Edwards drafts so well off of the investments Oracle is making in Oracle Fusion Applications. We are doing a lot of work on our user

interface based on the Oracle Fusion standards. Our users will see many of these interface enhancements over the next couple years that will make the system very modern.

**PROFIT:** In the past year, is there integration with another Oracle product line that you’re particularly proud of?

**“The notion that we pour millions of dollars into ERP and then turn our backs on it for 10 years—this has to change.”**

—Lyle Ekdaahl, Oracle Group Vice President and General Manager, JD Edwards

**EKDAHL:** Certainly for the JD Edwards community, the value chain planning integration has been very well received. It really addresses the volatility in the marketplace—the ability to get your arms around spare parts, inventories, and manufacturing supplies and production. This is a best-of-breed set of solutions that helps keep costs and delivery to customers aligned with the market. That ability is just critical today.

Another critical part of the JD Edwards community is our project-based customers—particularly in engineering and construction. Our integrations to Oracle’s Primavera products have served that sector very well. This is what we mean by layered-in differentiating value.

**PROFIT:** What is the impact of Oracle’s hardware business on JD Edwards?

**EKDAHL:** It’s actually pleasantly surprising. While we have supported [Oracle] Solaris for some time, having Sun as part of Oracle is opening up all kinds of opportunity. For example, a lot of people think JD Edwards applications are limited to the midmarket, and we do have a strong midmarket business. And of

course we’re hearing a lot of interest from our midsize customers for a prepackaged JD Edwards–Oracle hardware systems solution optimized for a smaller database environment—whether that’s Intel or Linux based. And so that’s something that we’re looking at and working on.

But we also have some very large customers that run JD Edwards applications, and I can say now that we have had great uptake in this space with Oracle Exadata. We posted some very impressive benchmarks last year on the Oracle Exadata box, and we just finished up our benchmarking of Oracle Exalogic and we’re blown away. My performance and scalability engineers recently ran some of our latest code on Exalogic and reported our most-impressive numbers ever. The thing just screams. And then, of course, the two of them together ultimately is Nirvana.

**PROFIT:** What technology do you see on the horizon that you’re really excited about bringing to JD Edwards customers?


**EKDAHL:** I think that over the next five-plus years, it really comes down to this notion of deployment options. Already we are getting steady interest in JD Edwards solutions that are cloud based, where Oracle runs and manages services for our customers.

In addition, we are working with technologies such as Oracle Application Development Framework [Oracle ADF] for mobile. It doesn’t make sense to throw a whole ERP system on an iPad. But there are parts and pieces, thin JD Edwards–based applets built with Oracle ADF Mobile Client, that it makes sense to tie back into your overall JD Edwards system.

So we’re focused on working with those two aspects of deployment technology. I think JD Edwards customers will be pleased to see these deployment options and technologies really come to full fruition over the next several years. It’s all part of the new ERP era. <>

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AARON LAZENBY is the editor in chief of *Profit*.



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# Empowering the Mobile Enterprise

Data Systems International® enables Oracle's JD Edwards customers to achieve accelerated returns on their investment.

**R**aghav Sharma is vice president of International Operations for Data Systems International (DSI®), a global leader in delivering innovative enterprise mobility solutions. Here, Sharma discusses what enterprises should look for in implementing a best-in-class mobility platform.



Raghav Sharma, Vice President of International Operations and Business Development for Data Systems International (DSI)

## What is the importance of a mobile enterprise in today's global economy?

The global economy has forced companies to be competitive and to look for ways to maximize resources—essentially, to do more with less. Companies realize that through mobile technologies, they have the potential to improve business processes and realize incremental productivity. According to a recent survey in *CIO Magazine*, the need to implement an enterprise mobility program checked in at #2 on the list of CIO priorities. It's clear that workers in today's

global market need to access accurate, reliable information anywhere, anytime to successfully do their jobs. A mobile enterprise enables them to do so, resulting in increased productivity and profitability.

## What are the most essential characteristics of a mobile platform?

A mobile platform must have three main characteristics. First, it needs to work everywhere that business takes place—operating both online and offline. Because mobile applications are mission critical, the platform should have the robustness to function in any circumstance. Second, a mobile platform must seamlessly integrate with back-end systems to maintain a single source of truth. Best-in-class mobile application platforms have validated integrations to leading ERP systems such as Oracle's JD Edwards applications. Finally, the mobile platform must be flexible. It needs to run natively on multiple device types, operating systems, and clients (full, thin, or Web); conform easily to ever-changing business processes; and support various types of communication to the back-end system.

## How do Oracle's JD Edwards customers benefit by using DSI's dcLINK solutions?

Companies that have invested in JD Edwards applications can increase profitability and productivity through mobility. In a recent study, Gartner found that the rate of an ERP's ROI is accelerated by 50 percent when mobile systems are used. DSI's dcLINK® has one of the fastest rates of ROI in the industry. With dcLINK, a JD Edwards-related activity can take place anywhere, anytime without the constraints of a desktop. Workers have access to accurate, real-time information at the point of activity, which results in greater efficiency. This has a direct,

positive effect on the bottom line. With DSI's mobile applications such as electronic proof of delivery with signature capture, companies can reduce the time from order delivery to invoicing by half, resulting in a positive effect on finances. Companies can realize additional efficiencies within their manufacturing, sales, and distribution operations with DSI's prepackaged mobile applications for field service, PO management, time management, route sales, and direct store delivery.

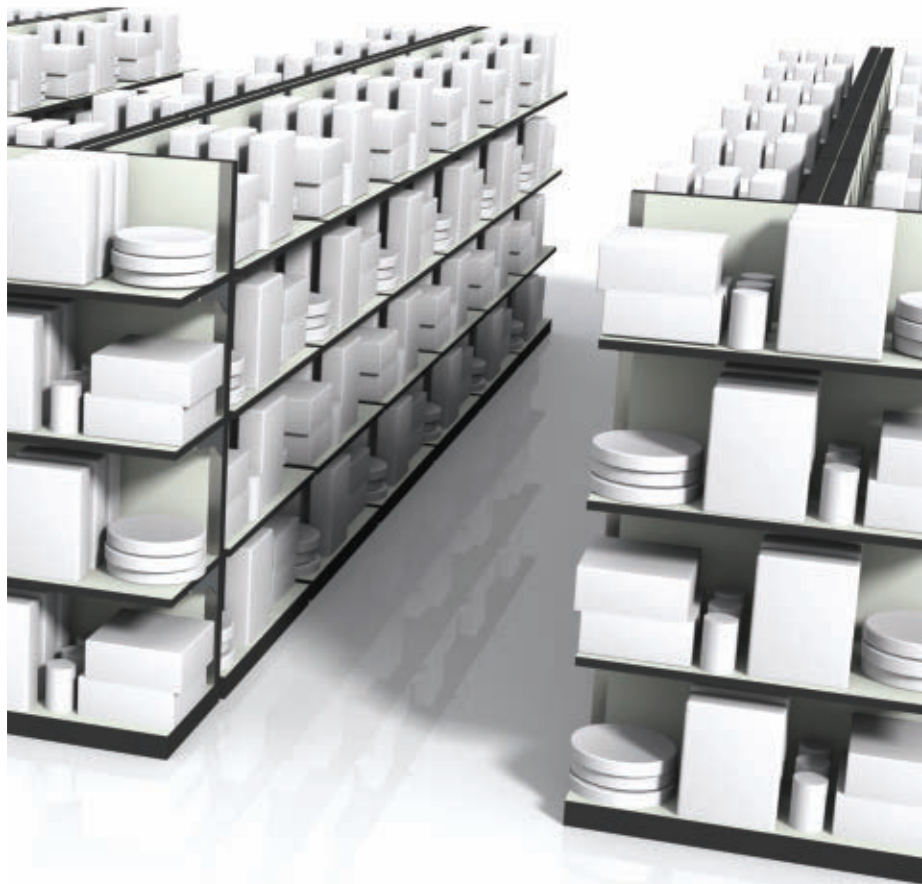
## What is DSI's approach to extending Oracle's JD Edwards implementations to the mobile environment?

We work with clients to optimize processes, server utilization, CNC design, and data volume within their JD Edwards installation. When a mobile worker sends data to the JD Edwards system, the look and feel of that data is exactly as if that worker entered it on a JD Edwards screen. We also make sure that we can support JD Edwards' ability to work with various companies and locations, and that our platform can securely handle the volumes of data and their different access levels. We provide flexibility—in types of hardware, types of functionality on those devices, and types of communication to the back-end system. While we are an end-to-end system, we also give companies the tools required to change the system as their business requirements change. One size does not fit all and such flexibility is the cornerstone of our platform. ■

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# Back in the USA

UNITED STREETCAR GETS DOMESTIC MANUFACTURING BACK ON TRACK WITH ORACLE ERP SOLUTIONS.

Everything old is new again—at least when it comes to streetcars. This nostalgic mode of transportation is currently experiencing a renaissance, because the modern streetcar offers an environmentally friendly public transit option that is helping to reduce traffic and revitalize urban city centers across America. One company that is taking this track, with a decidedly cutting-edge twist, is United Streetcar (USC). The company is bringing back a once-dormant industry as the only manufacturer of modern streetcars in the United States.

Based in the Portland, Oregon, suburb of Clackamas, USC was founded in 2005 as a subsidiary of Oregon Iron Works (OIW), a large metal fabrication shop that builds boats and bridges and other large projects. Chandra Brown, president at USC, says it was proximity to Portland—and the city's beloved mass transit system, TriMet (also an Oracle customer)—that inspired the development of OIW's new rail business.

"I realized in 2005 that Portland was importing its cars from the Czech Republic because there was no builder of streetcars in America," says Brown. "Streetcars were basically founded in the United States, and in past history, almost every city in America was a streetcar city."

PHOTOGRAPHY BY BOB MORRIS





Chandra Brown,  
President, United Streetcar



## **“We needed both the abilities of JD Edwards and the strong support of a local consulting firm to partner with us to succeed.”**

—Chandra Brown, President, United Streetcar

Brown, who is also vice president at OIW, believed streetcars would be a growth industry. In addition, she believed it was important that the streetcars be built in the

U.S., using parts and equipment made in America, from U.S. suppliers. “I went back to my company and said, ‘I think this is something we should do,’” she recalls.

However, building streetcars was a different kind of business than what OIW was used to. Instead of its usual focus on single projects to build hydroelectric bridges or military patrol craft, for streetcar manufacturing the company would need a system that made it possible to build projects on an ongoing basis and that also could be tailored to meet specific customer demands. If Brown and her team wanted to get USC on track, they would need an IT system to support the new business—and Oracle’s JD Edwards EnterpriseOne family of applications offered the perfect solution. “Building streetcars is much more of a mass production environment, which is different for us,” says Brown. “And we needed both the abilities of JD Edwards and the strong support of a local consulting firm to partner with us to succeed.”

### **ALL ABOARD**

Although many people may picture old-fashioned trolleys when they think of streetcars, modern streetcars are very different.

The sleek cars are low-floor vehicles, completely climate controlled and accessible to people with disabilities. According to Brown, unlike light rail, which typically takes

riders from the city center to the airport or the suburbs, a streetcar is more of a neighborhood or urban circulator. Rails generally are in the street, running in traffic with cars. “Streetcars, like light rail, are 100 percent electric, so it’s zero emissions. They are incredibly green,” adds Brown.

The first modern streetcar system was built in 2001 in Portland, and interest in the technology has since spread to cities ranging from Dallas, Texas, to Washington DC. Communities have found that streetcar lines not only link urban destinations; they also spark redevelopment in urban neighborhoods, with businesses, housing, and services all cropping up near routes—leading to safer, healthier, more-vibrant living areas that attract young professionals and empty nesters from the suburbs. “There are more than 50 cities that we’ve tracked in the U.S. looking at modern streetcars,” says Brown.

Elizabeth Deakin, professor of city and regional planning and urban design at the University of California, Berkeley, and the former director of the University of California Transportation Research Center, reports that economic development oriented around public transportation is vital. For example, she has found

## **Improving the Sustainability of Public Transit**

**T**he U.S. is an automobile-loving nation: driving a car is right up there with apple pie and baseball as symbols of American life. But recently, rising gas prices and concerns about dependence on foreign oil are causing many to rethink the role of public transit in their lives. The government is also encouraging this change; in 2010, as part of President Obama’s Livability Initiative, the Department of Transportation and the Federal Transit Administration announced US\$290 million in funding for 53 new transit projects for streetcars, buses, and transit facilities to improve quality of life in communities across the country.

According to Ralph Menzano, industry director of transportation at Oracle and the former CIO of the Southeastern Pennsylvania Transportation Authority, for transit agencies obtaining additional government funding and on the receiving end of growing public interest, a

key challenge in the coming years is to find a way to more effectively manage their organizations in sustainable ways without creating a lot of public debt.

One important component of fiscal sustainability is managing assets for a long and useful life. Menzano suggests that if the average gas-powered bus costs around US\$350,000 and is useful for 13 years, with proper asset management this could be stretched one additional year. And with many transit agencies investing in hybrid buses to achieve fuel efficiency, the potential cost savings of extending the life of hybrid buses are significant because hybrid buses are almost double the cost of regular gas-powered buses. “Better asset management directly helps the bottom line,” he says.

Helping transportation organizations achieve sustainability is an important focus at Oracle. Oracle’s new sustainable sensor data management solution, introduced in summer 2011

and part of Oracle E-Business Suite’s Oracle Manufacturing Operations Center, helps customers use sustainability analytics to reduce waste, monitor energy usage, and achieve greenhouse gas emission reduction objectives.

In addition, Ndevr, whose sustainability software was recently acquired by Oracle, offers a plug-in for JD Edwards solutions to measure sustainability metrics. Typically a transit agency is broken down by facility and by rail or bus routes. The agency receives a line-item bill that shows kilowatt (kW) usage. The plug-in effectively converts the kW into CO<sub>2</sub> emissions. It matches the CO<sub>2</sub> emissions with standards set by the federal government, so companies can see if they need to reduce emissions. Users can also calculate how much money reducing emissions will save the organization.

“Sustainability is not just being ecologically green,” says Menzano, “It’s being financially green too.”

that development around light rail has created an economic development boom for housing because people really want to live near an effective public transportation system.

Deakin believes that growing support for public transportation is due to changing attitudes, especially from young people who are interested in sustainability. “It’s a lifestyle thing,” says Deakin. “People are particularly interested in trying to live in a way that doesn’t require them to use a car for everything. Recent research suggests that the creative class is much more interested in public transit, which is a good thing, because it brings people to a region who are inventors and who come up with new ideas.”

Another huge contributing factor to growing interest in public transportation is government investment. In 2010, the Department of Transportation and the Federal Transit Administration announced US\$290 million in funding for 53 new transit projects for streetcars, buses, and transit facilities to improve quality of life in communities across the U.S. as part of President Obama’s Livability Initiative. States are also getting involved—which in some ways is even more important, Deakin says. “Here in California, we have bills encouraging metropolitan regions and local governments to go toward more mixed-use development to create the kinds of places where transit will actually work well,” she explains.

And while federal and state governments are certainly spending on projects for buses, research by the American Public Transportation Association (APTA) reveals that streetcars and light rail are gaining attention for the important reason that when conditions are equal, rail transit attracts from 34 percent to 43 percent more riders than the equivalent bus service.

Light rail also provides an alternative to existing forms of mass transit, according to Ralph Menzano, industry director of transportation at Oracle and the former CIO of the Southeastern Pennsylvania Transportation Authority. “There are probably few people who are happy to have to take the bus every day,” says Menzano, who believes that streetcars have a different allure than more-utilitarian forms of mass transit. Streetcar manufacturers must take this into account. “For riders, streetcars and trains are certainly a cut above buses in terms of enjoyment,” he says.

Indeed, industry studies cited by APTA point to the fact that light rail and streetcars have routes that are clearly identifiable and more stable than bus routes. They also use vehicles that are often more comfortable and don’t expose riders



**Chandra Brown, president of United Streetcar, is committed to establishing a U.S.-based supply chain that sources at least 60 percent of manufacturing materials from domestic suppliers.**

to fumes and noise.

“It’s obvious to me that people would rather take a streetcar than a bus, but streetcars right now largely have fanatical advocates,” Menzano says. “The question is, how do you make streetcars more mainstream?”

#### **PERFECT TIMETABLE**

This is the question USC’s management team is focusing on as it builds the business from the ground up—no easy task as a brand-new company in an industry with no other U.S. company to use as a model. To make matters more complicated, USC is building the first streetcars in the U.S. in more than 50 years.

“One of the bigger challenges we have had is setting up a new supply chain in the United States,” says Brown. “We want to meet the [U.S. government’s] Buy America requirements that stipulate that at least 60 percent of your vehicle needs to be built and sourced from the United States. We’ve had to find companies that have maybe never built a part or a piece for a streetcar because most streetcars are built in Europe.”

According to Don Hutchison, director of finance at USC, this was complicated by the fact that USC’s manufacturing processes would differ from those well known to workers at its parent company, OIW. “OIW has been and is extremely successful, but it is really a job shop,” says Hutchison. “If a bridge or dam has trouble, we go and fix it pretty easily. We don’t have 100 of them, and don’t have to worry about which one it is and how to get parts. The streetcar is more of a production environment.”

USC executives realized they needed to implement an enterprise resource planning (ERP) system to manage the manufacturing and supply chain processes as an engineer-to-order shop, where base items would be similar but builds would be unique. It needed help to evolve into a manufacturing company.

To help with the project, Hutchison and his staff connected with Jibe Consulting, a management and technology consulting company and Oracle partner based in Portland. Jibe specializes in helping small startup companies implement systems to effectively manage future growth. This made the Oracle partner a perfect fit for USC’s requirements. “Jibe was local and invested in being a long-term partner with us. Most other ERP experts we spoke to were used to converting customers from an existing system to a bigger system. We needed a partner who could sit with us and understand what we were doing, and then recommend best practices as we move forward,” says Hutchison.

Jibe also helped USC ask critical questions, honing in on

## >>SNAPSHOT

**United Streetcar**  
**unitedstreetcar.com**

**Location:** Clackamas, Oregon

**Revenue:** More than US\$50 million in orders

**Employees:** 24 full time, 12 subcontractors

**Oracle products:** JD Edwards EnterpriseOne solutions, Primavera solutions

how the company's leadership should manage procurement and manufacturing lead times. "We focused on helping them determine how they should be reviewing quality and how they should receive parts and decide if the parts are good," says Shane Moncrieff, president at Jibe.

With Jibe's guidance in the areas of process leadership and application expertise, USC selected Oracle's JD Edwards EnterpriseOne solutions as its ERP backbone because those solutions could meet the company's anticipated manufacturing needs as a startup operation and easily scale over time.

USC decided to do a phased approach with its ERP system. Phase 1, which was completed in August 2010, focused on implementing procurement and financial systems functionality. Phase 2, slated for completion in summer 2011, will implement materials management and manufacturing features as well as full job-costing functionality, while Phase 3, planned for 2012, will include order management and service.

"We did an accelerated implementation that took around four months for Phase 1. Businesses change so fast and priorities change so quickly that we feel it's really important to sculpt the project to a size that allows us to do it quickly," says Moncrieff.

### BUILDING SUCCESS

Moncrieff says Jibe has seen many smaller companies that in the beginning don't tend to have processes in place to handle things such as purchase agreements, engineering change orders, and inventory control. He says that a well-managed ERP project can help a maturing organization develop stronger processes, management reporting, and leadership, because the system provides measurable results—and it can also set the tone and direction for an organization as it grows.

In USC's case, the ERP implementation project has helped establish a financial foundation in Phase 1 to track costs, since the company has already received more than US\$50 million in orders for 13 cars. Some of the cars will be used in a streetcar extension project in Portland, while other cars are for a brand-new streetcar project in Tucson, Arizona.

The JD Edwards system is helping USC management address this demand. Hutchison says that the system allows him to easily set up a new project and charge all the costs to that job. Because USC is competing against larger companies, he needs to be able to count on such tools to be successful. "As we build cars, the ERP system will allow us to pull in the engineering portion as opposed to just the cost portion, so at the end when we deliver a car, we will know exactly what is on it and track it over time," says Hutchison.

The company is just beginning the production process and is already reaping benefits with the software. It has been a big challenge to establish a completely new supply chain with U.S.-based suppliers, but USC is depending on JD Edwards EnterpriseOne Procurement and Subcontract Management to help manage its subcontractors and more than 200 vendors.

The software enables USC to set up classification codes to track certain attributes to make sure the company is in compliance with government regulations for Buy America or disadvantaged business reporting requirements. "With these filters, I can run a report and pull, just using

those criteria, the information we need. We can compile and review a large amount of data, such as delivery history, which is valuable in building and evaluating vendor relationships," says Hutchison.

### FORWARD MOTION

After Phase 3 is implemented, USC will have the ability to offer aftermarket sales and service for customers who may need service contracts, or accessories such as components, lamps, and chairs. The ERP system is also helping USC management plan for the future. "We're building 13 cars now, but we have the capacity to do more than 20 cars a year. We've already planned for that ability to expand. The ERP system definitely helps us, especially as we look at the procurement of things and help with the planning and scheduling," says Brown.

Using a phased approach was really important to USC because it allowed the company to determine what it needed initially and to look ahead to plan for future requirements. Equally important, the company could accurately determine what could be delayed to make things more manageable in terms of resources, staff, and budget. "For any company, ERP is a big implementation," Hutchison says. "For a new company, it can be daunting."

One lesson learned for USC has been that ERP implementation is an ongoing process even after the go-live date, making it imperative to have local IT support and expertise. Fortunately, Jibe is committed to providing the support services needed to maintain USC's JD Edwards ERP application over the long term.

"It takes a village to build a streetcar and to create a new industry. So, while USC is very proud of what we're accomplishing, it's important to note that it hasn't come easily," Brown concludes. "There have been a lot of people helping us, as well as us investing our own money to make this project successful. One of the things we've done better than everyone else is build relationships and build partnerships with vendors and political leadership. I think that's a big competitive advantage." <>

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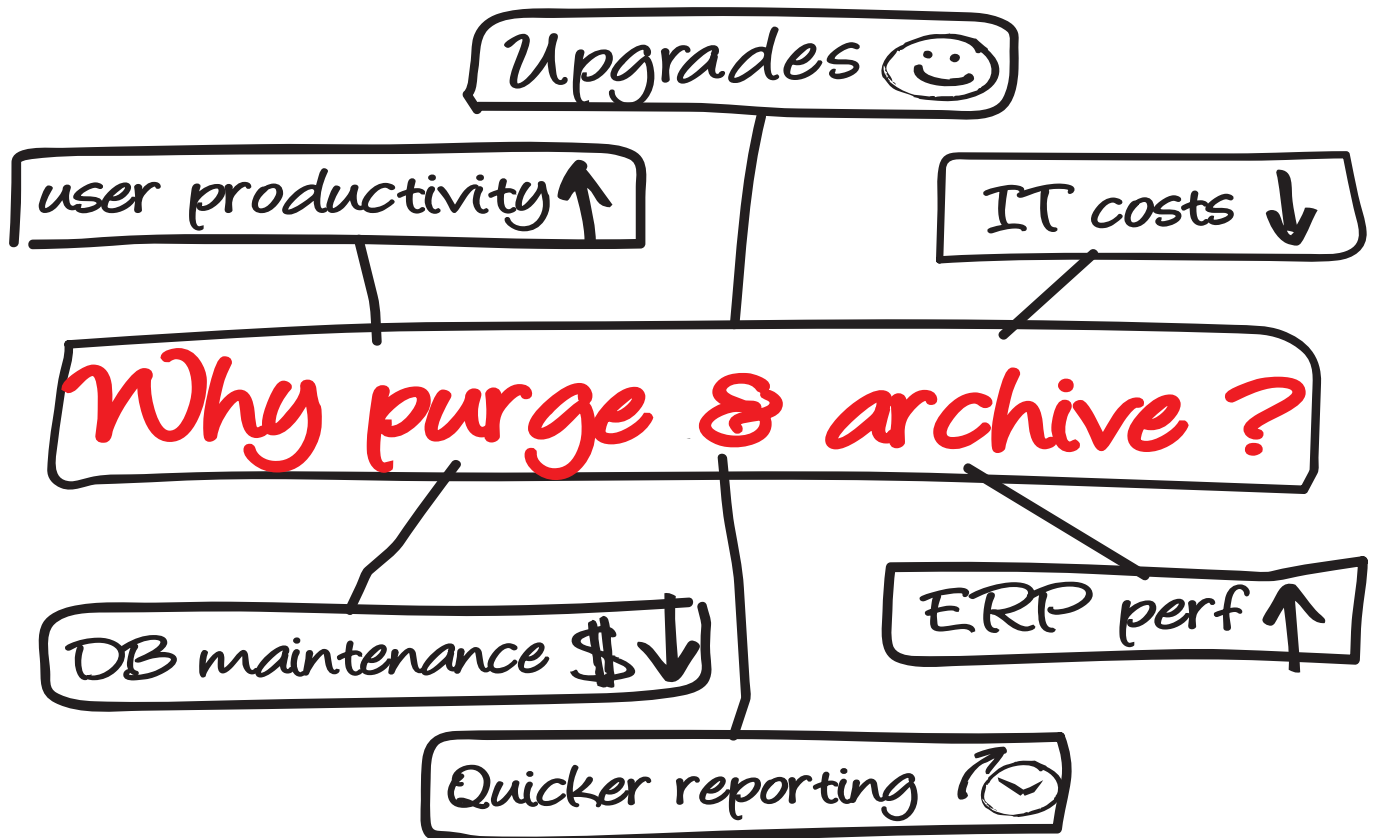
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# The Power of Flexible Data Collection

**Menu Foods achieves 24/7 operations and real-time traceability with RFgen's data collection solution.**

In the food industry, the threat of recall is constant. Food companies need to be able to track all the way down to the individual unit of product so they can quickly remove it from shelves, and then do a full backward trace to find out the origin of the problem.

In 2008, Menu Foods sought to improve its ability to track and trace products in the supply chain. Menu Foods is a leading North American private-label manufacturer of pet food products sold by supermarket retailers, mass merchandisers, pet specialty retailers, and other outlets. With yearly revenues of US\$260 million, it provides pet-food manufacturing to 17 of the top 20 North American retailers as well as leading pet specialty retailers in North America.

Management wanted to be able to find out where and when every product was manufactured, and the origin of the ingredients in the product. Their legacy custom data collection system did not have the lot traceability and shipment tracking they required. They needed a proven, successful data collection solution that would provide real-time integration with everything from manufacturing to license plating.

## A Better Way of Tracking

After careful vendor research, Menu Foods chose RFgen's Integration Suite for Oracle's JD Edwards Applications for its proven success in giving customers total lot traceability, efficiency, and real-time integration with their JD Edwards EnterpriseOne Release 8.10 solution from Oracle. RFgen helped Menu Foods implement its data collection solution over eight weeks in four facilities in Canada and the United States.

RFgen's Integration Suite for Oracle's JD Edwards Applications provided a number of benefits for Menu Foods in its manufacturing

and distribution operations. Most importantly, it increased traceability and shipment tracking efficiencies, reducing the risks associated with recalls. RFgen implemented its standard License Plating Suite between warehouses, which assigns units with serial numbers that uniquely identify them. "We now have improved ability to track inventory, including lot traceability," says Bryan Bennett, vice president of IT at Simmons Pet Food, which acquired Menu Foods. "This has increased the confidence in the accuracy of the inventory."

RFgen's high-availability solution also enabled 24/7 operations at Menu Foods,

## Flexible, Adaptable Data Collection

RFgen software is a complete, automated data collection solution that reduces costs in the supply chain by integrating seamlessly and easily with core business processes. RFgen's flexible architecture and proven ability to reduce complexity help increase control and streamline operations for customers to sharpen their competitive edge. More than 2,000 individual customers worldwide choose RFgen solutions for their data collection needs. "A lot of our customers' manufacturing operations need to run 24/7 for continuous production," says Robert Brice, executive vice president at RFgen. "If the connection to the host is lost or the server is

**"RFgen extends JD Edwards solutions so companies can continue to operate the manufacturing facility autonomous from the central server with real-time visibility."**

*— Robert Brice, Executive Vice President, RFgen*

regardless of the availability of the JD Edwards EnterpriseOne host system. It also provided real-time integration for supply chain operations. "Being a more modern technology, RFgen has enabled Menu Foods with the tools they need to expand the use of data collection in their operations," says Bennett.

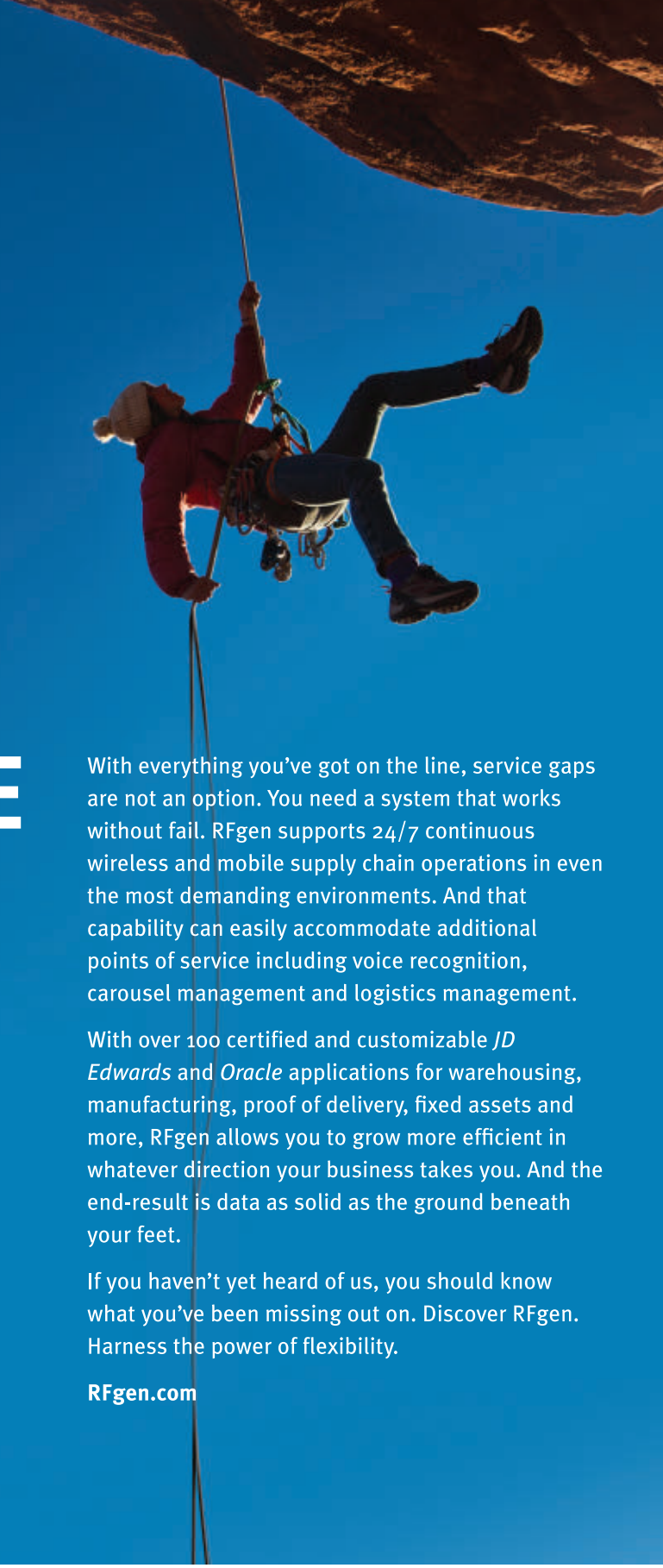
RFgen's ease-of-use has reduced end-user training time and resulted in an improved overall user experience. "The users like the ease-of-use," says Bennett. "New employees are able to learn the system quickly." In fact, the solution was so successful in improving manufacturing and distribution operations that Simmons Pet Food expanded implementation of the RFgen software in another facility due to its success at Menu Foods.

down for backup, RFgen extends JD Edwards solutions so companies can continue to operate the manufacturing facility autonomous from the central server with real-time visibility."

RFgen's applications are easy to customize and adapt to each organization's specific supply chain requirements, with one of the shortest implementation times in the industry. "We deliver the power of flexibility to the customer," says Brice. ■

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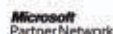
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