

# INFORMATION FOR SUCCESS

Oracle Consulting  
2008





**ORACLE IS THE INFORMATION COMPANY**

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Oracle customers achieve real business results using Oracle applications and technology.

These results serve as the foundation for our continued success as a company and drive the development of Oracle's industry-leading products and solutions. It is through these products and solutions that Oracle customers transform their businesses – and realize massive business value.

Oracle Consulting delivers on our promise to transform your business. We do this across the complete project lifecycle from business strategy planning, stakeholder change management, process optimization, leveraging Oracle products, and lowering your total cost of ownership based on the 11,000+ experts globally who know Oracle best: Oracle Consulting. Together, we can drive sustained business results for you while lowering your risk and total cost of ownership.

On the following pages, you will find compelling examples of our customers' successes from across North America – successes that have leveraged both the power of our applications and technology, and the capabilities of our end-to-end services – across multiple industries. These success stories highlight how Oracle products and services have helped companies of all sizes transform their Oracle software into even more powerful business solutions.

Please read on, and discover how you can leverage these solutions to realize your business results with Oracle Consulting. To learn more, contact your local Oracle representative or visit [oracle.com/consulting](http://oracle.com/consulting).

Thank you for your consideration.



Mark Salser  
Senior Vice President  
Oracle Corporation



Stephan Scholl  
Senior Vice President  
Oracle Corporation

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**AAA of Northern California**

San Francisco, CA

www.csaa.com

**Industry:**

Professional Services

**Annual Revenue:**

\$2.5 billion

**Employees:**

7,000

**Oracle Products & Services:**

- PeopleSoft Enterprise
  - Human Capital Management
  - Helpdesk for Human Resources
- PeopleSoft Portal

“Oracle’s PeopleSoft gives us measures for integrity, excellence, collaboration, and accountability. This is very important to the company because we have very high standards for our employees.”

— **Scott McVittle**, Senior Manager, People Information and Strategy, AAA of Northern California

## AAA of Northern California Improves Human Resources Processes and Reduces Costs

AAA of Northern California (CSAA) was established in 1907, seven years after the founding of the national AAA organization. CSAA offers a wide array of automotive, travel, insurance, and financial services. CSAA serves four million members in northern California, as well as Nevada and Utah. It is the second-largest member organization of the national AAA organization. CSAA is committed to cost-effectively managing its internal processes so it can pass the savings along to its customers.

### Challenges

- Improve tracking and processing of human resources (HR) information
- Provide self-service capabilities to employees
- Ensure compliance for all time-keeping laws

### Solutions

- Upgraded to Oracle’s PeopleSoft Enterprise Human Capital Management 8.9 to improve information processes for human resources in order to attract and retain the best workforce talent
- Implemented PeopleSoft Enterprise Helpdesk for Human Resources to track and process vital HR information and retain valuable employees
- Leveraged PeopleSoft Enterprise Employee Self-Service to provide self-service functionality to 7,000 employees and empower managers to spend more time on strategic initiatives
- Ensured zero negative liability by remaining 100% compliant with time-keeping laws for exempt and non-exempt employees

**Acuity Brands Lighting**

Atlanta, GA

www.acuitybrands.com

**Industry:**

Industrial Manufacturing

**Annual Revenue:**

\$1.8 billion

**Employees:**

7,500

**Oracle Products & Services:**

- Oracle Real Application Clusters
- Oracle Database
- Oracle E-Business Suite
- Oracle Advanced Supply Chain Planning
- Oracle Human Resources
- Oracle Financials
- Oracle Human Resources
- Oracle Incentive Compensation
- Oracle Consulting Services

“Low operational costs and rapid, high-quality production capabilities are our blueprints for success. Oracle provides the added flexibility and scalability that is central to our growth strategy.” — **Phil Kilgore**, Vice President of Information Technology, Acuity Brands Lighting

## Acuity Brands Lighting Retools Operations for Added Performance, Reliability, and Scalability

Acuity Brands Lighting, a business unit of Acuity Brands, Inc., is North America’s largest provider of indoor and outdoor lighting fixtures for new construction and renovation markets. The company’s 16 international production facilities manufacture approximately 100,000 fixtures daily for homes, offices, schools, manufacturing facilities, warehouses, hospitals, roadways, and parking lots.

**Challenges**

- Enhance scalability for business and manufacturing applications
- Improve reliability and performance for mission-critical applications
- Gain new levels of flexibility to capitalize on opportunities rapidly
- Increase return on investment for enterprisewide application infrastructures

**Solutions**

- Implemented Oracle Real Application Clusters on Linux to create a reliable, highly-flexible IT platform
- Gained the ability to add capacity quickly and cost effectively as needed with Oracle Real Application Clusters
- Fulfilled the requirement for high performance—even during maintenance and upgrades—using Oracle Real Application Clusters’ dynamic failover capabilities
- Worked with Oracle Consulting Services to upgrade IT infrastructures quickly and efficiently
- Reduced total cost of ownership significantly using Oracle and Linux
- Easy transition from Windows to Linux with existing personnel
- Streamlined operations across multiple brands using Oracle ERP and Manufacturing, and other Oracle applications
- Reduced IT complexity while maintaining flexibility

**Avago Technologies, Inc.**

San Jose, CA

www.avagotech.com

**Industry:**

High Technology

**Annual Revenue:**

\$1.8 billion

**Employees:**

6,500

**Oracle Products & Services:**

- Oracle Product Life Cycle Management
- Oracle Advanced Supply Chain Planning
- Oracle Discrete Manufacturing
- Oracle Shopfloor Management
- Oracle Consulting Services
- Oracle Trade Management

**Oracle Partner:****Satyam Computer Services Ltd.**

www.satyam.com

“Oracle Product Life Cycle Management enabled Avago Technologies to lower our total cost of ownership while streamlining product life cycle and change management processes.”

— **Jim Martin**, Vice President,  
Worldwide Order Management &  
Logistics, Avago Technologies, Inc.

## Avago Technologies, Inc. Enhances Change Management, Reduces Total Cost of Ownership

Avago Technologies, Inc., which began as Hewlett-Packard Company's (HP) components division in the 1960s, provides an extensive range of analog, mixed-signal, and optoelectronic components and subsystems to tens of thousands of manufacturers around the world. Today, it is the largest privately held, independent semiconductor company in the world. Avago's products serve four end markets: industrial and automotive, wired networking, wireless communications, and computer peripherals.

**Challenges**

- Reduce material procurement and manufacturing costs
- Increase flexibility to address dynamic market requirements
- Reduce IT complexity and improve the reliability and performance of critical applications

**Solutions**

- Implemented Oracle Product Life Cycle Management to establish a reliable IT infrastructure that significantly improved parts data accuracy and accelerated production setup time
- Deployed Oracle Product Life Cycle Management on a single infrastructure platform across the company's enterprise resource planning (ERP) and supply chain management (SCM) applications
- Reduced the number of change orders, change order cycle times, and implementation costs by 40% to 50%
- Reduced the complexity of managing and sharing documents with suppliers and contract manufacturers
- Increased collaboration across the extended enterprise (encompassing internal and external functions) throughout the product lifecycle
- Worked with Oracle Consulting and Satyam Computer Services Ltd. to deploy the new applications quickly and train employees to optimize the new system

**BMO Financial Group**

Toronto, Canada  
www.bmo.com

**Industry:**

Financial Services

**Annual Revenue:**

\$320 billion

**Employees:**

35,000

**Oracle Products & Services:**

- Oracle On Demand
- Oracle Financials
- Oracle Internet Expenses
- Oracle iProcurement
- Oracle Purchasing
- Oracle Discoverer
- Oracle Consulting Services
- Oracle Database
- Oracle Application Server

## BMO Financial Group Reduces Costs and Gains Flexibility with Single Application Platform

“Oracle is providing a holistic view that enables us to add services seamlessly while we lower costs across our multiple business units. We’re now fully automating the entire procure-to-pay lifecycle through our Oracle solution.”

— **David Montgomery**, Director, Procurement Operations and Corporate Services, BMO Financial Group

BMO Financial Group is a highly diversified financial services organization that manages total assets of \$320 billion and primarily serves Canada and the United States. BMO’s portfolio includes personal, commercial, corporate, and institutional financial services. Established in 1817 as the Bank of Montreal, BMO brands include BMO Bank of Montreal, BMO Nesbitt Burns, Harris Nesbitt, and Chicago-based subsidiary Harris Bank.

As the financial services industry grows increasingly competitive, BMO continues to strive to differentiate itself by introducing new products and services to its broad customer base.

Acquisition is also central to BMO’s growth strategy, requiring the agility to incorporate multiple business applications into a single IT environment quickly. At the same time, BMO is focused on identifying cost savings while increasing operational efficiencies. These drivers spurred BMO to consider streamlining its IT environment.

“There had been a lot of challenges with many different procurement systems across our multiple businesses,” said David Montgomery, director, procurement operations and corporate services, BMO Financial Group. “Our procurement systems were not integrated with the payables and fixed assets systems. We required a holistic, enterprise-wide view of how much we spent with each supplier and specifically what had been purchased. We also needed to create a single center of competency to manage operations throughout our organization and sidestep the business integration hurdles traditionally associated with corporate acquisitions and deploying new applications.”

To support its business objectives, BMO selected Oracle On Demand for the flexibility to deploy new applications quickly across multiple business units via a single IT platform. The company deployed Oracle E-Business Suite applications to gain a single, enterprise-wide view of critical procurement information, reduce invoice-processing costs by \$3.6 million annually, while also accelerating operations, including expense report payments.

### Increasing Business Flexibility and Responsiveness

To reduce the cost and staff requirements to maintain multiple procurement, accounts payable, and fixed asset systems, BMO sought a single vendor to manage an end-to-end, enterprise-wide procurement system. This would mean converting its multi-organization architecture, representing 41 Legal Entities, to a single instance.

“We wanted low upfront costs and faster application implementations across our North American organization,” Montgomery said. “Oracle On Demand reduces our financial and technology risks so that we implement changes faster. By consolidating our IT environment onto a single platform, we eliminated a significant amount of maintenance costs.”

**Key Benefits:**

- Gained an integrated view of critical business information
- Implemented flexible, reliable infrastructure to support business growth
- Cut invoice processing costs by 50%
- Reduced expense report processing from 14 days to less than two days
- Leveraged company-wide procurement visibility to negotiate supplier discounts
- Minimized costly and time-consuming maintenance
- Accelerated deployment of new applications and services

The single IT infrastructure is especially integral to BMO's continued acquisition plans in the United States and Canada. The hosted infrastructure simplifies and accelerates BMO's ability to extend its applications to newly acquired companies. Employees access the managed applications via a standard Web browser, which eliminates application integration challenges. Oracle On Demand enables BMO to scale applications quickly to support additional users without adding IT staff.

**Reducing Invoice Processing Costs 50%**

BMO had more than 40 accounts payable processing centers across its multiple businesses, as well as nearly 1,000 bank branches in Canada that processed their own invoices.

BMO implemented Oracle E-Business Suite to cut processing costs in half, saving nearly \$3.6 million annually by centralizing invoice processing and automating nearly one-fifth of its annual invoices.

**Gaining Single View Across Multiple Businesses**

BMO has established BMO Buying Online, a Web-based infrastructure that supports the company's diverse procurement requirements. BMO uses Oracle iProcurement, to track and analyze its use of vendors across all businesses and all procurement categories.

"We look at how much we are spending with each vendor," Montgomery said. "The strategic sourcing team uses this information to negotiate larger pricing discounts based on total organizational purchasing with each vendor and control leakage."

BMO uses the consolidated information to send compliance reports to groups that are not following with the Bank's Expense Management Directives. Oracle Discoverer is used to generate customized reports for things like fixed assets among others.

BMO uses Oracle iProcurement to automate employee requisitions using the Bank's BMO Buying Online Application, accessible to employees through a BMO employee Web site and a standard browser. Employees can access approximately 82,500 pre-approved catalog items online. BMO also creates supply catalogs for each business unit to streamline and simplify the process.

"The BMO-approved supply catalogs enable us to track employee and group purchases quickly and easily," Montgomery said. "We can direct employees to the lowest-priced item or provide additional options."

**Adding Legal "Store" Services**

BMO is expanding its procurement services—providing employees with added functionality to address evolving customer requirements efficiently and quickly. In January 2006, BMO

launched its first new procurement service, a legal services store with the implementation of 11.5.10.

“We are providing employees with the ability to order legal services through the online store,” Montgomery said. “The legal store enables us to select law firms based on price and industry expertise criteria.”

The legal store features a workflow requisition process. If a group submits a request that exceeds the stipulated cost threshold, the BMO Law Department automatically receives and reviews the request to ensure that the requestor receives appropriate services.

### **Accelerating Expense Payment Processing**

BMO has also added online expense claim processing capabilities to automate and accelerate employee reimbursements. In 2003 BMO completely discontinued its acceptance of paper-based expense reports. All employees now use Oracle Internet Expenses to file their claims. Using the application, BMO can automatically post employee corporate credit card charges to an online expense claim form. Employees only need to review, classify, and submit the online forms for immediate processing. The payment is then sent directly to MasterCard for immediate credit to the account.

“We’ve reduced expense claim form processing from approximately 14 days to within two days after approval, now that we are processing all employee expenses electronically,” Montgomery said.

BMO used Oracle Internet Expenses to process 139,000 expense claims electronically in 2005. Approximately 12,500 employees use BMO’s online expense processing capabilities, receiving reimbursements electronically to pre-selected accounts.

### **Why Oracle?**

Prior to selecting Oracle, BMO managed its disparate systems internally, which was costly, time-consuming, and required significant in-house IT expertise. Further, BMO executives were concerned that the in-house software packages did not have the flexibility or scalability to address planned growth. BMO evaluated vendors including SAP before selecting Oracle.

“Oracle provides us with the ability to roll out one application across the entire organization and gain full application visibility across all business operations,” Montgomery said.

“Additionally, the Oracle E-Business Suite provides the end to end procurement requirements to manage the entire business process. We also wanted an existing, out-of-the-box solution that would speed deployment times while providing standard browser-based ease of use. We are realizing substantial savings with our Oracle E-Business Suite applications on Oracle On Demand.”

### Implementation Process

After an RFP process in 2000, a twelve-member BMO team worked with a six-member Oracle Consulting Services team to deploy the Oracle applications. BMO was impressed with Oracle's technical expertise.

"After the initial implementation two Oracle consultants remained and were integral to the project team," Montgomery said. "They were extremely good at listening to users' requests and fulfilling each business's special requirements that varied significantly across our services, spanning private banking and brokerage firms."

BMO initially deployed its Oracle E-Business Suite applications at BMO Financial Group's Head Office groups at the Oracle on Demand site in the Exodus Data Centre in 2001. After a pilot phase, BMO then converted Harris Bank in 2002. In 2004, BMO expanded the deployments to include BMO Nesbitt Burns, Harris Nesbitt, and all remaining BMO Canadian and U.S. subsidiaries.

BMO upgraded its Oracle E-Business Suite to include store functionality in 2005—BMO launched its first boutique store in January 2006 for legal applications.

BMO runs one production instance of Oracle E-Business Suite. However, BMO uses three additional instances for application testing and changes prior to full production. "Now that we have completed our implementation phase, we are working with Oracle as part of an additional customization consulting project," Montgomery said BMO's Oracle On Demand platform migrated to Oracle's Austin, Texas Data Center in 2004.

BMO continues to lower the cost of invoice processing by implementing the Integrated Documents Management System, Markview, provided by 170 Systems, an Oracle Certified Partner. Implementation is schedule for March 2007.

*Established in 1817, as Bank of Montreal, BMO Financial Group is a highly diversified North American financial services organization. With total assets of more than \$320 billion as at October 31, 2006, and 35,000 employees, BMO provides a broad range of retail banking, wealth management and investment banking products and solutions. BMO Financial Group serves clients across Canada through its Canadian retail arm, BMO Bank of Montreal and through its wealth management firms BMO Nesbitt Burns, BMO InvestorLine and BMO Harris Private Banking. BMO Capital Markets, our North American investment and corporate banking division, provides a full suite of financial products and services to our North American and international clients. In the United States, BMO serves clients through Chicago-based Harris, an integrated financial services organization that provides more than one million personal and business clients with banking, lending, investing, financial planning, trust administration, portfolio management, family office and wealth transfer services.*

**Oracle Customer:****Campbell County Government**

Gillette, WY  
www.ccgov.net

**Industry:**

Public Sector

**Employees:**

638

**Oracle Products & Services:**

- Oracle Consulting Services
- JD Edwards World
  - Human Resources Management
  - Resources Benefits
  - General Accounting
  - Accounts Payable
  - Accounts Receivable
  - US Payroll

“Although we have used Oracle’s JD Edwards financial software for the past 15 years, it seems that we have just started to realize all of its abilities since the upgrade. With the help of Oracle trainers - who not only introduced the enhancements, but also spent two weeks training the staff - users felt comfortable and confident with the new software.”  
— **Beth Kirsch**, Senior System Support Analyst, Campbell County Government

## Campbell County Government Upgrades Existing Applications, Improves Government Operations

Campbell County, located in northeast Wyoming, is the energy capital of the nation, with 30% of the nation’s coal produced in area surface mines. Ranching is the predominant land use; herds of cattle and sheep graze among herds of deer and antelope. Campbell County Wyoming was recently listed in a popular agricultural magazine as one of the top 100 places to live in rural America, and serves as home to nearly 39,000 citizens.

**Challenges**

- Seamlessly upgrade to a new version of Oracle’s JD Edwards World applications to take advantage of new functionality
- Consolidate five separate payroll environments into one
- Ensure minimal downtime during system upgrade
- Provide staff with comprehensive training on the new system

**Solutions**

- Worked with Oracle Consulting to upgrade the county’s JD Edwards World financial and human resources applications, consolidating county data and improving government operations
- Worked with Oracle Consulting to reduce application customizations, allowing for cleaner, faster upgrades in the future
- Combined five payroll environments to form one integrated environment
- Worked with Oracle Consulting and Oracle trainers to ensure that users were comfortable on the new system
- Created awareness among staff and users of the benefits of an annual JD Edwards training program
- Experienced minimal downtime and business disruption during the system upgrade
- Created relationships with Oracle Consulting personnel, who have helped out with issues and opportunities since the upgrade

**Datacard Group Minnetonka**

Minnesota  
www.datacard.com

**Industry:**

High Technology

**Annual Revenue:**

US\$400 million

**Employees:**

1,700

**Oracle Products & Services:**

- Oracle Database
- Oracle Order Management
- Oracle Configurator
- Oracle Service
- Oracle Marketing and Sales
- Oracle Supply Chain Planning
- Oracle Mobile Supply Chain
- Oracle Financials
- Oracle Projects
- Oracle Procurement
- Oracle Consulting Services
- PeopleSoft Enterprise Human Capital Management

**Oracle Partner:**

**Apex IT**

www.apexit.com.com

“With Oracle, we were able to streamline operations across our global enterprise, enabling a significant savings of US\$10 million within only the first year.”

— **Alla Johnson**, Director of Systems and Services, Datacard Group

# Datacard Group Minnetonka Realizes US\$10 Million in Savings One Year after Implementing Integrated Applications

In business for more than 30 years, Datacard Group provides the technology for issuing financial cards and identification documents. Datacard manufactures a wide range of advanced technology card printers, point-of-service and credit card authorization terminals, embossing machines, personalization systems, and other technologies. Datacard also develops card issuance and photo identification software.

**Challenges**

- Replace multiple home-grown enterprise resource planning (ERP) systems with a consolidated solution to streamline processes and provide enterprisewide visibility
- Ensure that system standards comply with audits and meet segregation of duties requirements
- Reduce time needed to process orders and minimize the need for customer follow-ups after orders are placed
- Accelerate new user training

**Solutions**

- Worked with Oracle Consulting and Apex IT to implement integrated Oracle applications, which were selected over SAP to provide a single, global instance of IT applications and hardware
- Enabled enterprisewide visibility of information, streamlined business processes, and improved decision making abilities
- Used Oracle Order Management for the ability to accurately track customers across the system from sales lead, to the delivery of a finished product, through post-sales service
- Streamlined post-order processes with Oracle Configurator, eliminating the need to follow up with customers for additional order details and decreasing overall lead times to the delivery of final products
- Accelerated new-user training, reducing training times for new employees from six months to a few weeks
- Realized US\$10 million in savings across the enterprise just one year after implementation

**Discovery Benefits, Inc.**  
 Fargo, ND  
[www.discoverybenefits.com](http://www.discoverybenefits.com)

**Industry:**

Financial Services

**Annual Revenue:**

\$120 million

**Employees:**

More than 500

**Oracle Products & Services:**

- Siebel CRM On Demand

“With Oracle’s Siebel CRM On Demand, we have the tools and flexibility we need to achieve our company’s commitment to providing responsive and flexible administrative services.”  
 — **Jeff Brunsberg**, Executive Vice President, Discovery Benefits, Inc.

## Discovery Benefits Inc. Improves Client Service with Integrated Data and Automated Business Processes

Discovery Benefits, Inc. is a national leader in employee benefits administration. With a presence in all 50 states, Discovery Benefits offers flexible benefits administration, including COBRA, Transportation Fringe Benefit Plans, Health Reimbursement Arrangements, and Health Savings Accounts. Simplifying employee benefits administration, the company seeks to reduce paperwork, create efficiencies, and minimize costs. Discovery Benefits is owned by State Bankshares, Inc., which also owns State Bank & Trust. Together Discovery Benefits and State Bank & Trust have more than 500 employees.

### Challenges

- Support current and anticipated growth
- Reduce reliance on in-person conversations, e-mail communications, and manual processes to provide visibility into client implementation status
- Enable centralized reporting
- Implement consistent data management and business process practices

### Solutions

- Implemented Oracle’s Siebel CRM On Demand applications to automate and standardize processes and replace legacy Lotus Notes database
- Established a single source for all contact information, customer activities, and service requests—consolidating information from multiple back-end systems for improved visibility, service, and reporting
- Deployed hosted model to provide added flexibility and accessibility—allowing users to access the system via the internet, yet enjoy offline functionality that allows sales teams to target sales channels and download customer details before a site visit
- Enabled desired visibility into the full customer lifecycle
- Enabled automated notification to the implementation team when sales are closed or key milestones are achieved, driving improved service
- Provided tool for management oversight with new visibility into the sales pipeline

**Idaho Technology, Inc.**

Salt Lake City, UT  
www.idahotech.com

**Industry:**

Life Sciences & Pharmaceuticals

**Employees:**

200

**Oracle Products & Services:**

- Siebel CRM On Demand

“With Siebel CRM On Demand, we’re identifying opportunities more quickly, closing more business, and spending our sales and marketing dollars more wisely.”  
— **Todd Ritter**, Director of Sales and Marketing, Idaho Technology, Inc.

## Idaho Technology, Inc. Drives Growth and Improves Operational Efficiency with Hosted CRM System

Idaho Technology, Inc. develops the fastest, highest-quality machines in the world for pathogen identification and DNA analysis. The privately owned company develops instruments, software, and chemistries for life science researchers and medical technicians. In addition, the U.S. Department of Defense and U.S. Department of Homeland Security use the company’s devices to detect and study disease-causing organisms.

**Challenges**

- Improve efficiency and effectiveness of the sales process
- Improve ability to capture, track, and utilize marketing information
- Utilize sales and marketing resources more effectively
- Increase return on technology investment (ROI)

**Solutions**

- Rapidly deployed a flexible, easy-to-use, and feature-rich customer relationship management (CRM) system with Siebel CRM On Demand
- Gained the ability to extend ROI across a range of sales and marketing functions by leveraging the system’s extensive functionality
- Significantly improved marketing campaign effectiveness with integrated lead-management capabilities
- Enabled sales associates to identify opportunities more rapidly and manage leads more effectively, driving bottom-line growth of 74% across all business units within a one-year period
- Gained the ability to track opportunities from the lead source through transaction close for each sales person
- Gained the ability to evaluate the effectiveness of sales and marketing campaigns, enabling Idaho Technologies to optimize its investment in these areas
- Enhanced employee productivity and satisfaction

**McKesson Specialty**

Scottsdale, AZ

www.mckesson.com

**Industry:**

Life Sciences &amp; Pharmaceuticals

**Annual Revenue:**

US\$88.050 billion (McKesson)

**Employees:**

26,400 (McKesson)

652 (McKesson Specialty)

**Oracle Products & Services:**

- Siebel CRM On Demand

“We wanted to create a global view of customer account information across our organization. With Oracle’s Siebel CRM On Demand, we quickly implemented a new system that standardized our processes and provided us with visibility into sales and customer activity, as well as any issues and pending resolutions.”

— **Minde Fawcett**, Director of Sales Operations, McKesson Specialty

## McKesson Specialty Standardizes Sales and Marketing Processes and Increases Customer Visibility

A division of the McKesson Corporation, McKesson Specialty delivers the new approaches and solutions needed to ensure success in the evolving specialty pharmaceutical market. The division’s services include reimbursement support services for patients and physicians, reimbursement strategy for pharmaceutical manufacturers, specialty distribution and pharmacy services; oncology services, state-of-the-art call center; transaction processing systems, comprehensive database management capabilities, and patient support services including clinical support and patient assistance programs.

### Challenges

- Increase company-wide visibility into sales activities and customer accounts
- Standardize and automate sales and customer relationship management (CRM) processes
- Enable the company to track reported issues, inconsistent processes, and resolution time
- Simplify system functionality to increase user adoption

### Solutions

- Implemented Oracle’s Siebel CRM On Demand to standardize sales and marketing systems across product lines in the McKesson Specialty business unit
- Offered the flexibility required to accommodate multiple sales processes and roles
- Enabled consistent pipeline reporting, sales stage management, and reporting across product lines
- Created a global view of the customer across the organization
- Allowed the organization to track and report on issues in the resolution process
- Supported sales team roles, enabling internal and external sales representatives to collaborate on account, opportunity and service request management
- Minimized the need for customizations
- Ensured a rapid implementation, deploying the system in less than 90 days

**Oracle Customer:****Metropolitan Government of Nashville and Davidson County**

Nashville, TN  
www.nashville.gov

**Industry:**

Real Estate Management

**Annual Income:**

US\$1.4 billion

**Employees:**

21,000

**Oracle Products & Services:**

- Oracle On Demand
- JD Edwards EnterpriseOne
  - Financial Management
  - Payroll
  - Human Capital Management
  - Capital Asset Management
  - Condition-Based Maintenance
- Oracle Consulting Services

**Oracle Partner:****WTS, Inc.**

Seattle, WA  
www.wts.com

## Metropolitan Government of Nashville and Davidson County Accelerates Operations, Expands Service to Its 600,000 Citizens

“Oracle On Demand will work with you and help you to become successful. If we hadn’t partnered with Oracle On Demand, we would not have been able to sustain our system or add new functionality by extending the application suite.”

— **Mark Arend, Assistant Director**, Finance, Metropolitan Government of Nashville and Davidson County

The Grand Ole Opry, Music Row, and downtown honky-tonks have been integral in establishing Nashville’s iconic status as “Music City, USA.” The Nashville metropolitan area, which includes Davidson County, Tenn., has also been recognized as one of America’s best cities by Forbes, Fortune, and other influential organizations. The Metropolitan Government of Nashville and Davidson County (Metro Nashville) maintains high marks for fostering business development and livability by controlling costs while expanding services to its nearly 600,000 residents.

Metro Nashville has a \$1.6 billion annual budget, employs more than 20,000 people, and administers an additional 7,000 pensions. To streamline services, Nashville and Davidson consolidated their separate governments into one entity in 1963. Technology is the centerpiece of Metro Nashville’s continued strategy to increase operational efficiencies.

When a comprehensive IT project stalled 16 months into the project, with no solution in sight, city officials turned to Oracle On Demand to solve their technical challenges. This put them into a position to complete the project, deploy new applications, control costs, and add flexibility to their operations.

“We wanted to decrease the bottom line for our IT costs while adding new services,” said Arend, “However, we did not have the extensive technical expertise required to deploy our new applications. Rather than hiring more specialized staff and investing in additional hardware, we turned to Oracle On Demand to realize new application benefits while freeing the IT team to concentrate on other priorities.”

**New Model Needed**

Metro Nashville is focused on standardizing applications across its 54 departments, which include police, fire, hospitals, public schools, finance, emergency management, and public works. In 1998, City officials initially deployed Oracle’s JD Edwards World Financial Management for enterprisewide financial applications.

Over time, officials required new capabilities to accelerate accounts payable processing and provide new e-procurement capabilities. Metro Nashville began a major migration in July 2003 to Oracle’s JD Edwards EnterpriseOne applications.

Sixteen months into the implementation, Metro Nashville officials determined the migration project was too vast and complex for internal IT resources to manage. Metro Nashville reevaluated its technical infrastructure, including hardware, and the personnel responsible for maintaining the infrastructure and decided that the January 2005 go live deadline could not be met.

**Key Benefits:**

- Reduced bill payment processing costs by nearly 25%
- Gained an integrated view of critical business information
- Adopted a flexible infrastructure to add new applications quickly
- Realized new application benefits without incurring integration and management overhead

“Unless you have a highly skilled IT department, you’re better off writing a check every month to Oracle On Demand and not saddle your organization with infrastructure, migration, and management headaches.”

— **Mark Arend**, Assistant Director of Finance, Metropolitan Government of Nashville and Davidson County

Sixteen months into the implementation, Metro Nashville officials determined the migration project was too vast and complex for internal IT resources to manage. Metro Nashville reevaluated its technical infrastructure, including hardware, and the personnel responsible for maintaining the infrastructure and decided that the January 2005 go live deadline could not be met.

“When we conducted a cost justification for outsourcing, we looked at the costs for infrastructure, software licenses, maintenance contracts, and expenses required to maintain all IT services internally,” Arend said. “Our cost justification validated that it is more economical for us to outsource our IT systems than to continue to struggle and maintain the systems in house.”

Rather than continuing to add consultants to the delayed migration project, Metro Nashville selected Oracle and WTS, Inc., Oracle’s strategic hosting partner for JD Edwards applications, to deliver the on demand services.

The hosting model offers low upfront costs and long-term flexibility to add new applications quickly without dedicating staff resources on complex migration projects.

By using Oracle On Demand, Metro Nashville quickly got the migration back on track. Already Metro Nashville has completed major migration milestones and is providing new applications to increase employee productivity without assuming additional staff or costly infrastructure.

“Unless you have a highly skilled IT department, you’re better off writing a check every month to Oracle On Demand and not saddle your organization with infrastructure, migration, and system management headaches,” Arend said. “Oracle On Demand will work with you and help you to become successful. If we hadn’t partnered with Oracle On Demand, we would not have been able to sustain our system or add new functionality by extending the application suite.

**Reduce Bill Payment Processing Costs By 25%**

Metro Nashville processes approximately 300 to 400 invoices daily, which requires significant staffing to identify, route, approve, and process its accounts payable function.

To accelerate and streamline accounts payable capabilities, Metro Nashville adopted JD Edwards EnterpriseOne Financial Management and deployed custom workflow capabilities. Metro Nashville scans all invoices and automatically routes the documents electronically for approval.

The new automated invoice processing application is already paying dividends. Metro Nashville estimates it has reduced bill payment processing costs by nearly 25%. Metro Nashville’s accelerated invoice processing supports the city’s commitment to enhance services for individual and corporate residents.

### Single Payroll System for All Types of Workers

Metro Nashville is combining its managed hosting capabilities and new applications to centralize key functions, such as payroll. Prior to deploying JD Edwards EnterpriseOne Financial Management, Metro Nashville supported two payroll systems--one for general government and a second for Nashville Metropolitan Public Schools (MNPS). The MNPS payroll system, a legacy system that resided on a mainframe, was highly customized and difficult to maintain. Metro Nashville gained operational efficiencies and drove costs down by combining the payroll departments to get all employees on the same payroll software. Today, Metro Nashville supports payroll for more than 10,000 general government employees and 11,000 MNPS employees, in addition to the systems' combined pensioners, bringing the total payroll to an excess of 26,000 employees.

### Add Powerful E-procurement Applications

Metro Nashville is using its IT capabilities to add new e-procurement applications. Oracle's JD Edwards EnterpriseOne architecture is flexible, enabling integration with third-party products.

The new e-procurement application will simplify contract management and improve staff ability to comply with Metro Nashville procurement processes and legal requirements. Metro Nashville projects the new e-procurement application, which will be live in the fall of 2006, will save \$6 million in the first year of operation.

### Preventive Maintenance to Drive Down Costs

Maintenance is traditionally viewed as an expense. Metro Nashville, however, is closely tracking maintenance activities to reduce costs while improving responsiveness for key projects. By using the new Enterprise Asset Management applications to centrally manage fleets, buildings, ground maintenance, and transportation, Metro Nashville management is better able to align appropriate resources with maintenance priorities.

### Why Oracle?

Prior to selecting Oracle, Metro Nashville faced challenges upgrading to a new system. System deployment was costly, time-consuming, and required focused expertise in architecture, hardware, and software integration not available in house.

In addition to supporting new applications, Metro Nashville required a powerful solution that would fulfill the city's requirement for 19 gigabytes of memory to store its vast records and provide 350 concurrent user licenses to support the thousands of employees who access the city's network daily.

"We needed to move quickly to get the project back on track," Arend said. "Once we determined that an on demand solution was the path to success, we contacted Oracle and WTS, conducted reference checks, and determined this was the best way to save our project."

### Implementation Process

In February 2004, Metro Nashville contracted with Oracle for on demand services. In November of 2005 Metro Nashville launched the first new applications; since then it has regularly rolled out additional applications.

“We had the implementation back in full swing within a month of beginning the hosted engagement,” Arend said.

The Web-based applications support 350 concurrent users. Eight Java application servers provide load balancing to support high performance levels. Approximately 20 business analysts, developers, or consultants access the system using fat clients. An additional group of 35-40 super users access the system using Citrix applications.

Metro Nashville’s Oracle On Demand platform is located in WTS’ data center in Seattle. Today, Metro Nashville has a deep operational relationship with Oracle and relies on Oracle On Demand to keep its applications and technology available, secure, and up-to-date.

“Seamless delivery of support, maintenance, and development expertise, proactively maintaining and updating our software, helps us to achieve an superior return on our investment.”

*The Metropolitan Government of Nashville and Davidson County serves nearly 600,000 citizens in the Nashville, Tennessee area.*

**Michael Baker Corporation**

Moon Township, PA  
www.mbakercorp.com

**Industry:**

Engineering & Construction

**Annual Revenue:**

\$579 million

**Employees:**

5,000

**Oracle Products & Services:**

- Oracle On Demand
- Oracle Database
- Oracle Real Application Clusters
- Oracle Financials
- Oracle Project Costing
- Oracle Project Billing
- Oracle Project Resource Management
- Oracle Project Management
- Oracle Project Contracts
- Oracle Time & Labor
- Oracle Internet Expenses
- Oracle iProcurement
- Oracle Marketing and Sales
- Oracle Field Sales
- Oracle Human Resources
- Oracle Advanced Benefits
- Oracle iRecruitment
- Oracle Enterprise Asset Management
- Oracle Property Manager
- Oracle Balanced Scorecard
- Oracle Consulting Services
- Oracle University

## Michael Baker Corporation Enhances Project Management with Single View of Business Data

“Oracle E-Business Suite applications have allowed us to manage very complex programs across our enterprise, and as an Oracle On Demand Customer, I feel that I have access to the best and brightest Oracle resources.” — **Andy Verone**, Chief Information Officer and Executive Vice President, Michael Baker Corporation

Michael Baker Corporation provides engineering, operations, and maintenance services for its clients' complex challenges. The company's goal is to be a complete lifecycle management company—to help its clients manage everything from capital planning to project conception, through design, engineering, operation, and maintenance, and eventually, renewal of the asset. With more than 40 domestic offices and 14 international locations, Michael Baker has an aggressive growth strategy to expand its global footprint, while still maintaining the controls and procedures necessary for a public company.

“Our challenge is accessing accurate information,” said Andy Verone, chief information officer and executive vice president, Michael Baker Corporation. “A question we continually struggle with is—how can we get timely information out to a very diverse widespread workforce?”

Baker deployed various modules of Oracle E-Business Suite with Oracle On Demand for 3,500 users worldwide. The implementation allowed the company to gain a single, enterprise-wide view of its critical business information, improve its project management capabilities, and ease regulatory compliance. Oracle On Demand enabled Michael Baker to reduce technology costs, provide a robust reporting environment, and scale for continued growth.

### Providing a Single Unified View of Critical Information

Baker is segmented into two business units—engineering and energy. Its engineering business encompasses transportation, aviation, facilities, water, wastewater, and asset management. Over 40% of the company's engineering business is with the Federal government, including work with the Federal Emergency Management Agency (FEMA), the Department of Homeland Security (DHS), and the Army Corps of Engineers. In its energy business, Baker is the top provider of manpower in the Gulf of Mexico for offshore production facilities. The company provides operations and maintenance management services to corporations including ExxonMobil, BP, and Shell, as well as several large independent producers.

As Baker has continued to grow and expand its footprint, it found it challenging to provide its employees with access to up-to-date business information and to ensure they follow standard business processes.

“For example, our FEMA contract 500 resources working on it full time, including employees and contractors. We need to make sure they each have the same view of the business,” Verone said.

In 2002, Baker took the first step toward this goal by aligning its IT and business strategies. At the time, the company had many legacy systems supporting the business worldwide. Baker wanted to move to a single platform and a single business process, while at the same time making sure it followed local regulations in its many geographies.

**Key Benefits:**

- Gained a single, enterprise-wide view of critical business information
- Improved project management capabilities
- Eased regulatory compliance
- Allowed Michael Baker to streamline its ERP support staff while scaling for future growth
- Saved over a half million dollars a year through hardware and application management costs
- Provided business continuity and vast recovery options
- Streamlined procurement processes
- Enabled more efficient tracking of employee time

“Oracle On Demand does all the heavy lifting for database administration, instance management, application upgrading, infrastructure management and patching. We have a very small staff for a system that transacts upwards of \$600 million in revenue a year with more than 3,500 active users”

-- **Andy Verone**, Chief Information Officer and Executive Vice President Michael Baker Corporation

Baker implemented one global instance of Oracle E-Business Suite applications for financial management, project management, human resources, expenses, procurement, sales, and enterprise asset management in early 2003. The company decided to have Oracle manage the applications through Oracle On Demand.

“We moved to Oracle On Demand for a couple reasons,” Verone said. “Mainly, we didn’t have the skill set to operate and maintain a complex environment like the one we invested in with Oracle. We decided it was in the best interest of the company to invest in subject matter expertise around using the modules. In addition, Oracle On Demand helps us with change control processes and documentation, which are important from a regulatory compliance standpoint.”

Oracle On Demand has enabled Baker to streamline its enterprise resource planning (ERP) support staff while continuing to scale for continued growth.

“My enterprise resource planning support shop today is comprised of two project managers, one application manager and one report writer,” Verone said. “Oracle On Demand does all the heavy lifting for database administration, instance refreshing, application upgrading, and patching. We have a very small staff for a system that transacts upwards of \$600 million in revenue a year with more than 3,500 active users.”

At the same time, the Oracle On Demand implementation has allowed Baker to save well over one million dollars a year through hardware costs and by allowing Oracle to manage the applications.

“There’s a very nice return, and it provides a way for me to reinvest the savings in new application modules,” said Verone, who is responsible for information technology, knowledge management, and logistics management worldwide.

Baker’s Oracle E-Business Suite implementation—which is currently at 150 gigabytes and expected to grow by 30% per year—has allowed it to pursue its growth strategy more effectively.

“We are acquiring small but very niche partners that operate in different business areas or different parts of the world,” said Verone. “Our track record on folding these companies into our environment has impressed not only our senior management. That was part of the decision process when we selected Oracle.”

The Oracle On Demand implementation also allowed Michael Baker to lower its total cost of ownership and provide a robust reporting environment. In addition, it provided the business continuity and disaster recovery options needed for the growing, global company.

“Oracle E-Business Suite applications have allowed us to manage very complex programs across our enterprise, and as an Oracle On Demand customer, I feel that I have access to the best and brightest Oracle resources,” Verone said.

### Enhancing Project Management Capabilities

Baker implemented Oracle's applications for project management to manage everything from project reporting, to budgets, to work breakdown structures for a wide variety of projects.

"We're in the project management business," Verone said. "Oracle Projects gives us the ability to manage everything from the small municipality projects through large federal programs, like the FEMA map modernization initiative. "It's flexible enough that it doesn't put an enormous amount of burden for a project manager of a very small project, and it's robust enough to accommodate large federal programs."

### Easing Regulatory Compliance

Baker is now in its third year of compliance with the Sarbanes-Oxley Act, the 2002 law that established stringent financial reporting requirements for public corporations.

Baker's chief financial officer, Bill Mooney, noted that the company had a very aggressive timeline to make the move to the Oracle E-Business Suite applications and the on demand model, and this helped in its Sarbanes-Oxley compliance.

"We could not have complied with Sarbanes-Oxley in time had we not made the change," Mooney said. "The documentation requirement and the testing we would have had to complete on our legacy system would have cost us at least twice what we spent. In addition, some of the capabilities Oracle brings to the table, like workflows and using e-mail to create outside-the-system documentation are incredibly helpful."

The integrated Oracle system provided the documentation capabilities, data integrity controls, and user controls Baker needed to comply with the wide-reaching regulation.

Verone added, "Having one set of business processes throughout the organization and one single global instance of Oracle helped during our Sarbanes-Oxley implementation. It would have been very hard to get there using our legacy systems."

### Improving Efficiency in Other Business Areas

Oracle E-Business Suite has helped Baker to improve its business processes in other areas as well. The company implemented Oracle iProcurement to streamline its procurement processes. Employees purchase various office supplies through the system and also use it to create purchase orders for subcontractors.

In addition, Baker deployed Oracle Internet Expenses to allow its employees to fill out their time cards online, no matter where they are in the world. The application helps the company keep accurate tabs on resource allocation and time management, particularly for customers like the Department of Defense, which has very stringent time tracking requirements for contractors.

“This is one module that interfaces with every employee in the company. We have never had an audit issue,” Verone said. “We have a very sound implementation of time recording, and more importantly, general transaction recording.

“We’re very proud of our diverse footprint,” Verone continued. “It’s not just a financial system. It’s not just a project management system. We’re using Oracle for everything from human resources through enterprise asset management.”

### **Why Oracle?**

Prior to implementing Oracle, Baker used financial management software. Baker continued to run the legacy, unsupported software for a while but realized it needed to move to a platform that would support its continued growth. It evaluated systems from Oracle, Deltek, and SAP before deciding on the Oracle E-Business Suite and Oracle On Demand.

“There were a number of systems out there that could meet our financial requirements,” Verone said. “But, we wanted to find an application that could meet our specific project and program management requirements, as well as provide an enterprise view of Bakers world. We were also looking for a system that required very little integration or interfacing. We looked across our requirements, and Oracle met them all.”

Baker was also impressed with Oracle’s breadth of expertise.

“Oracle is very deep in talent when it comes to this infrastructure and architecture, which includes Oracle Real Application Clusters running on Linux. In the short time we have been online with Oracle On Demand, all of our service level agreements have been met. Our experience has been outstanding.”

### **Implementation Process**

Baker implemented Oracle E-Business Suite through the Oracle On Demand “At Partner” model in January 2003, with the applications hosted at an Oracle partner site. In 2006, the company moved its platform to Oracle’s Austin, Texas data center.

“Oracle’s direction is obviously going toward Intel/Linux, which supports Oracle Real Application Clusters (RAC) environment,” Verone said. “This was a primary driver for moving to Oracle’s data center. In addition, we wanted to eliminate any complication with coordination.”

Oracle set up an instance of the Oracle E-Business Suite at the Austin data center to allow Baker to test the system. It took a year to plan, coordinate, and test the new system before going live.

“When it came down to executing the production cutover, it was seamless,” Verone said. “The Baker team and the Oracle On Demand team worked as one. Everyone had the same goal for a smooth migration with no production impact. The implementation was seamless to the end users—they saw no difference Monday morning when they came in and logged on.”

Oracle Consulting Services played a significant role in the implementation, working with Baker on necessary application customizations. In addition, Baker used Oracle University to bring “power users” up to speed on each module.

*Michael Baker Corporation provides targeted solutions focused on the complete lifecycle of its customers’ most complex engineering and operations challenges worldwide.*

**Myriad Genetics, Inc.**

Salt Lake City, UT  
www.myriad.com

**Industry:**

Life Sciences & Pharmaceuticals

**Annual Revenue:**

\$501 million to \$1 billion

**Employees:**

501 to 1,999

**Oracle Products & Services:**

- Oracle Database
- Oracle Enterprise Manager Grid Control
- Oracle Real Application Clusters
- Oracle Application Server
- Oracle Service
- Oracle Marketing
- Oracle Sales
- Oracle Financials
- Oracle Human Resources
- Oracle Order Management
- Oracle Purchasing
- Oracle Time and Labor
- Oracle Consulting Services

“In our performance testing, I was amazed with the speed at which we can capture, propagate, and apply transactions to the target. Before implementing Oracle Streams, we used another replication product. Oracle Streams can apply the same amount of transactions in minutes compared to hours with other replication products.”

— **Michael Margetts**, Database Administrator, Myriad Genetics

## Myriad Genetics Inc. Integrates Laboratory System with Scalable Solution

Myriad Genetics, Inc. is a leading biopharmaceutical company involved in the development of novel healthcare products in the areas of critical need that address some of the most pervasive diseases of our time. Myriad offers a range of cancer predictive medicine products and develops therapeutics including drug candidates in the areas of Alzheimer’s disease and cancer.

**Challenges**

- Integrate laboratory system with customer relationship management (CRM) system
- Implement solution to replicate data between two heterogeneous systems

**Solutions**

- Implemented Oracle Database 10g to improve database performance and reliability
- Implemented the Streams feature of Oracle Database to provide a simple yet robust architecture that allows real-time data replication between the laboratory and CRM systems
- Deployed Oracle Enterprise Manager Grid Control to simplify management of the database configuration, automating many functions
- Simplified system architecture and improved stability
- Provided scalable solution able to process a high volume of transactions in minutes instead of hours
- Reduced the potential points of failure in the system
- Gained ability to allocate memory dynamically
- Gained robust custom error handling capability and a flexible rules engine
- Oracle Consulting delivered the migration on time and within budget

**Port of Corpus Christi Authority**  
Corpus Christi, TX  
www.portofcorpuschristi.com

**Industry:**

Public Sector

**Annual Revenue:**

US\$45 million

**Employees:**

180

**Oracle Products & Services:**

- Oracle Consulting Services
- JD Edwards World
  - Financial Management
  - Project Management
  - Human Capital Management
  - Procurement Management

“We completed our upgrade of Oracle’s JD Edwards World in one weekend. We have gained new financial capabilities without experiencing costly retraining or risking stability to essential business operations.”

— **Marvin Mooney**, Application Systems Analyst, Port of Corpus Christi Authority

## Port of Corpus Christi Authority Accelerates and Simplifies Financial Operations with Rapid Upgrade

The Port of Corpus Christi Authority owns and operates docks and freight handling facilities at the Port of Corpus Christi, which is on the Gulf of Mexico—approximately 150 miles north of the US-Mexico border. The nation’s sixth largest port has terminals designed to handle general, refrigerated, and liquid and dry bulk cargo. Port facilities are served by rail carriers and highways, as well as by the Gulf Intracoastal Waterway.

### Challenges

- Improve operational efficiencies and gain added flexibility in financial and human resources applications
- Enhance accounting visibility and streamline reporting
- Capitalize new application benefits without a costly and protracted implementation process—and without disrupting operations

### Solutions

- Worked with Oracle Consulting to implement Oracle’s JD Edwards World applications for financial and human capital management to establish a highly reliable and scalable application suite that delivers enhanced performance
- Migrated to the new application version—A9.1—in just 10 hours
- Gained flexibility with Oracle’s Applications Unlimited to upgrade application infrastructure at the appropriate time for the business without risking business operations stability or requiring significant employee training
- Maintained highly-responsive support and service for the new application using Oracle’s Lifetime Support Policy
- Minimized system customizations
- Increased productivity with simplified financial changes and intuitive Web-based interface
- Reduced IT complexity while maintaining reliability and scalability

**San Diego State University**

San Diego, CA

www.sdsu.edu

**Industry:**

Education &amp; Research

**Annual Revenue:**

\$699 million

**Employees:**

7,000

**Oracle Products & Services:**

- Oracle Consulting Services
- PeopleSoft Enterprise Human Capital Management
  - Human Resources
  - Workforce Administration
  - Workforce Development
  - Candidate Gateway
  - Talent Acquisition Manager
  - Benefits Administration
  - Time and Labor

“In less than one year, we were able to create a consolidated system of record for all employee data to align SDSU with standardization across the California State University system. We also implemented limited self-service functionality (such as viewing benefit and payroll information, and applying for staff positions online), which has been well received on campus.”

-- **Cyndie Winrow**, Project Director, San Diego State University

## San Diego State University Standardizes Human Resources System

San Diego State University (SDSU), with nearly 34,000 students, is the oldest and largest university in San Diego, the third largest in California, and one of the largest universities in the western United States. SDSU is classified by the Carnegie Foundation as a “Doctoral/ Research University – Intensive.” The university is proactive in forming partnerships with business and industry, as well as with the state and federal governments.

**Challenges**

- Implement a pre-release version of a customized human resources (HR) system by the California State University system in preparation for a standardization of HCM systems across the California State University (CSU) system
- Consolidate multiple internal systems and automate processes
- Provide self-service functionality to enhance efficiency and access to information, and provide added convenience to employees

**Solutions**

- Worked with Oracle Consulting Services to implement a pre-release version of the CSU Common Management Systems’ customized software for Oracle’s PeopleSoft Enterprise Human Capital Management
- Achieved rapid implementation to prepare for a system-wide standardization across CSU
- Implemented SDSU’s first enterprise level campus-owned system of record for all consolidated employee data.
- Introduced new functionality including employee self-service component for viewing benefit and payroll information as well as applying for staff positions on campus.
- Completed the implementation in less than one year
- Worked with Oracle Consulting Services to perform several project quality reviews during the lifecycle of the project, enabling effective issue tracking and communication

**Sensis Corporation**

East Syracuse, NY  
www.sensis.com

**Industry:**

Aerospace & Defense

**Employees:**

More than 550

**Oracle Products & Services:**

- Oracle Financials
- Oracle Projects
- Oracle Manufacturing
- Oracle Procurement
- Oracle Human Resources
- Oracle Consulting Services

“We are pleased with how the relationship with Oracle evolved. They have not only stated their desire to build an even deeper partnership with us, but have demonstrated their commitment by taking the time to know our company and our operations, and by bringing in senior level resources to help us optimize our investments.”

— **Tom Uva**, Chief Information Officer, Sensis Corporation

## Sensis Corporation Deploys Seven New Features to Business with Critical Upgrade

Founded in 1985, Sensis Corporation is a global provider of air defense, air traffic control, airline and airport operations management, and data integration and distribution. The company’s core purpose is to provide distinctively elegant, innovative technical solutions in the service of humanity.

**Challenges**

- Stay current on technology to help support continued growth
- Prove business value beyond maintenance
- Integrate new solutions into initial technology investment

**Solutions**

- Worked with Oracle Consulting to upgrade Oracle E-Business Suite applications in 70 days—on time and under budget
- Completed the implementation in three phases, deploying seven new features to the business with the upgrade
- Minimized production downtime
- Created additional assets, such as reusable test plans, to ease future migrations
- Improved efficiency of financial management and human resources processes
- Positioned company for strategic enhancements
- Worked with Oracle Consulting to transition knowledge on the new system, increasing user uptake

**SNAP Guides, Inc.**  
 Montreal, Canada  
 www.snap-guides.com

**Industry:**

Communications

**Employees:**

50

**Oracle Products & Services:**

- Siebel CRM On Demand

“As a new and growing business, we needed to quickly deploy a solution that would enable us to automate and standardize our sales process. Oracle’s Siebel CRM On Demand solution provides the functionality we need today and in the future while reducing our IT management burden.”

— **Matthieu Houle**, Senior Manager Business Development, Yellow Pages Group

## SNAP Guides, Inc. Improves Sales Force Effectiveness

A division of Yellow Pages Group Company, SNAP Guides Inc. markets the Home Improvement Issue and Caregiver Solutions specialty books, two new products that Yellow Pages Group and Transcontinental Media introduced in 2006. With sales offices in Toronto and Montreal, SNAP Guides sells advertising to businesses and organizations targeting the home improvement and homecare consumer markets.

### Challenges

- Automate and standardize the sales process
- Enable sales tracking capabilities
- Achieve rapid implementation of a sales force automation (SFA) solution that enables scalability moving forward

### Solutions

- Selected Oracle’s Siebel CRM On Demand hosted solution to standardize and automate the new company’s sales process, while providing a scalable and flexible foundation to support future growth
- Ensured a rapid implementation, predictable IT costs, system reliability, and a reduced IT management burden with a hosted solution
- Enabled the sales team to more effectively manage and cultivate their territories through expanded business intelligence on current and prospective accounts
- Increased opportunity management and pipeline visibility with CRM On Demand’s analytics functionality
- Gained activity tracking capabilities that help Snap Guides to carefully manage employee effectiveness and efficiency
- Deployed the solution in multiple languages to support French-speaking Canadian users
- Provided the ability to conduct batch account loads through integration with Yellow Pages Group’s Siebel on premise implementation

**Spectrum Chemicals & Laboratory Products Inc.**

Gardena, CA  
www.spectrumchemical.com

**Industry:**

Chemicals

**Employees:**

400

**Oracle Products & Services:**

- Oracle Process Manufacturing
- Oracle Financials
- Oracle Order Management
- Oracle Warehouse Management
- Oracle iStore
- Oracle Consulting Services

“With Oracle, we will be able to continue to grow and expand our business, implementing new processes and improvements over time.”

— **Nasser Dastmalchi**, CIO,  
Spectrum Chemicals &  
Laboratory Products

## Spectrum Chemicals & Laboratory Products Inc. Revamps System for Worldwide Uniformity and Growth

Founded in 1971 as a fine chemical manufacturer, Spectrum Chemicals & Laboratory Products, a division of Spectrum Chemical Mfg. Corp., has grown into a customer-focused global supplier of high quality chemicals, laboratory supplies, and equipment. The company supplies more than 15,000 organic and inorganic chemicals and distributes nearly 17,000 lab supply and equipment items from 400 manufacturers each year.

**Challenges**

- Replace antiquated, homegrown system that no longer offered the flexibility and scalability needed to support growth
- Acquire a full-scale enterprise resource planning (ERP) solution that covers manufacturing, financial, procurement, and online sales, while simultaneously reducing operating costs
- Ensure equal, worldwide access to and use of the new solution

**Solutions**

- Implemented a comprehensive ERP solution using Oracle E-Business Suite applications—automating and consolidating the company’s financial, manufacturing, and remote and online sales processes
- Integrated systems worldwide
- Converted data from 220,000 items and more than 80,000 customers from the legacy system
- Selected Oracle to take advantage of Oracle Consulting, which Spectrum wanted as a long-term partner in developing, maintaining, and adapting the company’s IT infrastructure over time
- Enabled the company to continue its aggressive growth strategy—which calls for doubling its size over the next three years—by assuring heightened levels of flexibility and scalability

**TETRA Technologies, Inc.**

The Woodlands, TX  
www.tetratec.com

**Industry:**

Oil & Gas

**Annual Revenue:**

US\$784.9 million

**Employees:**

2,536

**Oracle Products & Services:**

- JD Edwards EnterpriseOne
- Oracle User Productivity Kit
- Demantra Advanced Forecasting and Demand Modeling

**Implementor:**

**Oracle Consulting**

**Oracle Partner:**

**Deloitte Consulting LLP**

www.deloitte.com

“Oracle Applications Unlimited means that Tetra has an upgrade path that will take us from where we currently are to the latest and newest functionality that Oracle offers—when we are ready.”

— **Daryl Ambres**, Project Manager, TETRA Technologies, Inc.

## TETRA Technologies, Inc. Improves Performance with Successful, Enterprise-Wide System Upgrade

TETRA Technologies, Inc. is a geographically diversified oil and gas services company that provides niche products and services for well completion and late-life production enhancement and decommissioning. In addition, TETRA is the world's largest vertically integrated producer, marketer, and distributor of calcium chloride, which it supplies as feedstocks for its completion fluids business and for applications in a variety of other markets.

**Challenges**

- Upgrade enterprise resource planning software to improve performance and ensure scalability for the expanding enterprise
- Streamline business processes to unify mixed cultures across the enterprise resulting from recent acquisitions
- Improve the order-to-cash process and accelerate the sales order cycle

**Solutions**

- Upgraded to Oracle's JD Edwards EnterpriseOne 8.12 to meet the growing company's increasingly complex supply chain and logistics processes
- Improved TETRA's ability to manage its sales forecasting capabilities through the integration of JD Edwards EnterpriseOne and Oracle's Demantra applications
- Allowed the company to expand visibility of sales information to serve its global team and quickly incorporate variances into forecasts for more accurate projections
- Gained the ability to make system upgrades on the company's own schedule with Oracle's Applications Unlimited initiative
- Improved the company's ability to streamline, understand, and cost its entire supply chain—including its transportation costs, which account for 30% of the cost of its products
- Leveraged Oracle User Productivity Kit to design business processes, such as procure-to-pay and order-to-cash, and build out training documentation, facilitating rollout of the system
- Isolated bottlenecks and adjusted transactions using Oracle Performance Monitor
- Worked with Deloitte Consulting LLP and Oracle Consulting to expedite implementation and support initial system tuning

**University of Central Florida**

Orlando, Florida

www.ucf.edu

**Industry:**

Education &amp; Research

**Annual Revenue:**

\$817.5 million

**Employees:**

9,286

**Oracle Products & Services:**

- PeopleSoft Enterprise
  - Financial Management
  - Supply Chain Management
  - Human Capital Management
  - Campus Solutions
- Oracle Database
- Oracle Consulting Services
- Oracle University

**Key Benefits:**

- Reduced time needed to authorize purchases orders from overnight to instantly
- Gained the ability to manage student aid disbursements and human resources with the financials system
- Met state timeline for creating its own financial system
- Enabled fast, individually tailored reporting to the university's many departments

## University of Central Florida Upgrades Financials to Manage \$817 Million—and Growing—Budget

“Oracle’s PeopleSoft applications help us address the challenges of running our university and business operations effectively.”

— **Rebecca Vilsack**, Associate Controller, University of Central Florida

Like the city in which it is based, the University of Central Florida (UCF) in Orlando has been shaped—and reshaped—by two major social and demographic forces: stunning growth and rapid change. Originally founded as Florida Technological University in 1963 at the direction of the state, the university changed its name and expanded its curriculum in 1978. Today UCF matriculates more than 46,000 students on 21 campuses and employs more than 9,000 faculty and staff. Among its missions is to “offer the best undergraduate education available in Florida.”

UCF has made technology and technological innovation the cornerstone of its educational and administrative strategy. As evidence, it is the only state institution to rank as one of Yahoo’s “most wired” U.S. colleges for four consecutive years. It also was one of the first state colleges in Florida to move off a statewide legacy accounting system and adopt a more flexible, innovative platform that met the university’s specific needs.

“Managing growth is one of our university’s ongoing challenges,” said Rebecca Vilsack, an associate controller at the University of Central Florida. “In a relatively short time, we have become the seventh-largest university in the country. It is critical that we provide a financial structure that allows flexibility in managing information.”

To achieve this flexibility—and with an eye toward becoming a model for other state universities throughout Florida—UCF built a financial technology infrastructure on Oracle Database and stacked it with a comprehensive financial and supply chain solution from Oracle’s PeopleSoft Enterprise line of products.

### Huge and Growing Budget

As UCF’s student population and campuses have grown, so has its operating budget. During the 2005-2006 academic calendar year, UCF’s operating budget was \$817.5 million. Administering and overseeing the budget is a complex undertaking: some 1,500 employees use the accounting system, and more than 800 employees are authorized to create requisitions.

“For our financials alone, the university uses total disk space of 111 gigabytes,” Vilsack said. “We have 61,257 indexes using 23.7 gigabytes; we have 53,555 tables using 87.3 gigabytes; and we have 25,975 views.”

The system the university inherited—a state-run software package called the Florida Accounting Information Resource, or FLAIR—had limited reporting capabilities and no Web resources. It also required long sequences of manual tracking procedures. “With our legacy system, static reports were distributed to departments either via a hard copy or through e-mail,” she said.

To complicate matters, the FLAIR system was being phased out for the state's 11 universities. The universities were authorized to implement independent accounting systems beginning in fiscal year 2004, and UCF elected to move as early as possible. "It was a major transition for the 11 state universities to move away from the legacy FLAIR system and implement new accounting systems," Vilsack said.

### **Twenty-one Campuses, One Solution**

UCF used the opportunity created by the migration from FLAIR to improve its system for the long haul with Oracle's PeopleSoft Enterprise Financials application, which integrates seamlessly with UCF's PeopleSoft Enterprise Supply Chain, Human Capital Management, and Student Financials applications. In planning for its new solution, UCF knew it wanted to avoid one management headache: having different financial and purchasing solutions at each of its 21 campuses.

PeopleSoft Enterprise's Web capabilities eliminated that concern. For the first time, UCF could centralize management while localizing access. "The great thing about our solution is that it is managed from a central location, and all sites use and access the PeopleSoft financial system via the Web," Vilsack said.

In addition, all the slow manual processes associated with the FLAIR legacy system have been eliminated or streamlined through automation. As a result, UCF's accounting operations have become more up-to-date, autonomous, and useful to the university's various departments.

"By implementing PeopleSoft Enterprise applications, the university has moved away from centralized reporting to decentralized self-reporting at the campus and departmental level," Vilsack said. "Now employees can create reports when needed via the Web—without programming intervention. It allows them to get information faster and frees up IT staff members to focus on other activities. The analysis individual users can do with the data is also phenomenal."

"At its most fundamental level, Oracle has met our needs because we were able to successfully devolve from the state's FLAIR system," she continued. "We also gained integrated data, better reporting capabilities, and improved access for authorized users from any Web browser."

UCF ultimately received an award for the project. "We met our devolution go live date of July 1, 2003, on time and under budget. UCF's excellence in converting more than 1,000 users from the legacy FLAIR system earned the financials implementation team a 2004 Davis Productivity Team Award," Vilsack said, explaining that the award recognizes and rewards state government employees whose work significantly increases productivity and reduces costs or promotes innovation within the delivery of state services.

“Oracle’s PeopleSoft financials solution has been invaluable. We’re now a 24/7 operation for information retrieval.”  
 — **Rebecca Vilsack**, Associate Controller, University of Central Florida

### The Next Step: Upgrade

In time, UCF wanted even more from its solution, and again it looked to the PeopleSoft Enterprise product line. “Our original PeopleSoft Enterprise Financial Management implementation was really about the mandated devolution from the FLAIR system,” Vilsack said.

To take the system to the next level, UCF sought to participate in Oracle’s Early Success Program (ESP), which provides dedicated resources and support to accelerate the upgrade to PeopleSoft Enterprise Financial Management and PeopleSoft Enterprise Supply Chain Management version 8.9.

### Approvals in Minutes

Each year, the university processes more than 32,000 requisitions and nearly as many purchase orders. Moving its entire purchasing operations online has trimmed costs, reduced errors, eliminated needless paper trails, and freed purchasing staff members from sluggish routing procedures.

“With the previous system, getting a purchase order approved was an overnight process,” Vilsack said. “Now, once an order is approved and the budget validated, it’s a matter of minutes before we’re able to authorize the purchasing department to execute a purchase order.”

Together, the financial and purchasing solutions yield a wealth of useful financial data. For the first time, UCF financial staff can parse and collate the data to meet the wide-ranging needs of the administration. “The great thing is that the data can be presented in various ways,” Vilsack said. “For example, just one piece of information—such as a category within the purchasing module—can be analyzed numerous ways.”

### Why Oracle?

In its first round selection—when the school was first given the opportunity to move off of the state accounting system—UCF went straight to Oracle’s PeopleSoft Enterprise Financials. “For financials we did not evaluate other products,” Vilsack said. “Our university wanted integration with our PeopleSoft-based student and HR systems, so the commitment was made early on to fully utilize PeopleSoft Enterprise applications.”

For its 2006 financials upgrade, UCF returned to the PeopleSoft solution for two reasons: long-term satisfaction with the solution and the opportunity to partner with Oracle for the upgrade through the Early Success Program. “The ESP provided project management support, escalated priority support, and direct input for enhancements,” Vilsack said.

### Implementation Process

Both implementations—the original and the upgrade—went exactly as planned, Vilsack said. “The PeopleSoft Financial Management 8.4 implementation project began on June 3, 2002 and successfully went live, on time and under budget, on July 1, 2003,” Vilsack said. “The PeopleSoft Enterprise 8.9 upgrade successfully rolled out as planned on May 1, 2006.”

In addition, the solution needed only slight modifications. “We basically use the product ‘out of the box,’ choosing to make few customizations. Instead, we look to retool our business processes, when necessary, to align with the system’s best practices. This approach has been a winning combination for UCF.”

*The University of Central Florida (UCF), a member of the state university system, serves more than 46,000 students on 21 campuses. Its service area encompasses 11 counties in the Orlando area.*

**Verizon Business (Cybertrust)**

Basking Ridge, NJ

www.verizonbusiness.com

**Industry:**

Communications

**Employees:**

32,000

**Oracle Products & Services:**

- Oracle Fusion Middleware
- Oracle BPEL Process Manager

**Key Benefits:**

- Merged three diverse IT infrastructures
- Provided a flexible, adaptable, and scalable solution
- Enabled independence through the use of open standards

## Verizon Business (Cybertrust) Creates Merged Portfolio to Speed Order-to-Cash Cycle

“Cybertrust [now part of Verizon Business] brought its security solutions offerings together on a centralized platform. In this regard, we use Oracle Fusion Middleware, which makes it possible for us to handle things in a phased manner. Our first project was focused on shortening our order-to-cash cycle, and the Oracle BPEL Process Manager played a key role.”

— **Laurence Heyndrickx**, Director Security Product Development, Verizon Business

In July 2007, Verizon Business acquired Cybertrust, a global information security specialist and market leader in managed security services. But before Cybertrust became a key part of Verizon Business’ security solutions team, it grew to prominence through its own mergers and acquisitions.

Cybertrust was established at the end of 2004 through the merger of TruSecure, Ubizen, and Betrusted. The merger brought together three complementary product offerings that contribute to a broad range of services used to help secure critical data, protect identities, and maintain ongoing information security compliance.

Each of the three companies brought along its own IT infrastructure, including diverse tools and applications. Furthermore, each company had its own technology platform for the delivery of security services. The first important challenge Cybertrust faced was creating a merged portfolio. Because each of the three companies had a different specialization, Cybertrust acted quickly to develop and deliver a comprehensive set of offerings.

### Creating a Merged Portfolio

In order to be able to create and deliver the merged portfolio, Cybertrust developed a Unified Security Platform to unite its offerings, opting for a Service Oriented Architecture (SOA) powered by Oracle.

By implementing Oracle Fusion Middleware, Cybertrust was able to easily integrate applications and information, with the lowest possible amount of duplication of development effort and functionalities.

The Oracle solution also allowed Cybertrust to easily make changes and upgrades to various SOA components, as needed.

“SOA allows for a phased approach,” said Laurence Heyndrickx, director Security Product Development, Verizon Business. “We can map the existing requirements and assign priorities to these, so that we can handle them step-by-step. In this way, we gradually switched over to the SOA philosophy.”

### Accelerating Order-to-Cash Cycle

The company demonstrated the SOA approach through the development of an order-to-cash project. The objective of the project was to connect customers more quickly to a common platform, so that the interval between order and invoicing would be reduced substantially.

“In order to realize this goal, we had to optimize and standardize a series of processes, reaching all the way from sales to accounting,” Heyndrickx explained.

It was not feasible to introduce the same new tool at every department. Therefore, Cybertrust opted for a solution that allows these departments to continue working with their trusted tools and applications, but to also have these processes controlled by the Oracle (Business Process Execution Language) BPEL Process Manager in order to achieve standardization.

“This engine lets us process orders in a consistent and controlled manner, to maintain a better overview, and to increase the efficiency of the actual implementation process,” Heyndrickx said.

The power of the solution lies in the fact that very little has changed for operational employees. While they continue working with the usual tools, they can control, monitor, and measure the entire process on the back-end --thanks to the Oracle BPEL Process Manager. The organization can input measurement results for reporting procedures, and can then use the reports to provide insight and thus further optimize the process.

“This phased approach assures that we can work cross-departmentally and that we can provide our customers with a quick return on investment. Using Oracle, we can quickly introduce new technologies, while at the same time keep development costs under control. The use of open standards gives us the freedom we need; we are not bound to a specific supplier, or to a set of tools that are in use in the various departments,” Heyndrickx said.

### **Why Oracle?**

Oracle technology provides a flexible solution. “The Unified Security Platform enables us to meet the specific needs of customers. It speaks for itself that this platform must be accessible at all times. Beyond that, it must also be flexible and quickly adaptable. Oracle’s solutions allow us to meet these demands,” said Heyndrickx.

In order to choose the best fitting solution, the security services provider defined its processes and subjected two different solutions to an extensive proof of concept. “We preferred the Oracle solution, since it is based on open standards”, explained Heyndrickx. “Also the fact that we could easily find support from Oracle solution partners, was definitely a plus.”

### Implementation Process

The implementation was carried out by a mixed team of employees and consultants from Oracle partners. The project was completed within four months. “Prior to the actual implementation, Oracle Consulting had assisted us with the analysis and design of the processes.” Although the use of the Oracle BPEL Process Manager was new, the organization could count on the appropriate support. “The challenging part was teaching our employees to work with the new processes,” concluded Heyndrickx. “However, we managed to address this by closely involving the business users throughout the whole project.”

*Verizon Business, a unit of Verizon Communications, is a leading provider of advanced communications and information technology solutions to large business and government customers worldwide. Combining unsurpassed global network reach with advanced communications, security and other professional service capabilities, Verizon Business delivers innovative and seamless business solutions to customers around the world.*









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