Automating Master Data Management Workflows for Oracle

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Poll #1: Please introduce yourself to us…

IT – Management
IT – Programmer Analyst
Line of Business Management
Line of Business Analyst
Other
Today’s Agenda

• SharePoint and Oracle - Why Integrate for Master Data Management? (5)
• From *Dirty to Perfect* Master Data (10)
• Demos:
  – Mass Item Create from MS Excel
  – Master Data process for new product introduction
• Review (10)
• Summary - Q&A (5)

*Please use the GoTo Meeting Question & Answer Panel to ask your questions during the webinar*

*Please participate in our surveys during the webinar speaker transitions*

*We will be sending the presentation at the conclusion of the webinar.*
Oracle – System of Record

- **PRO**
  - ERP Leader
  - Proven, Stable Technology
  - Very Large Ecosystem
  - Multiple Industry Solutions

- **CON**
  - Complex Oracle UI
  - Time & Quality of Data
  - Business Processes costly to change
  - Oracle Workflow is complex
  - Deployed to minority % of employees
SharePoint – Enterprise Portal of Choice

**PRO**
- Simple, Web based UI
- Collaboration
- Easy to Configure
- IT Friendly
- Very large Ecosystem
- Deployed across the Organization
- Business Unit Application Development (BUAD)

**CON**
- No ERP Functionality
- Not a system of record
- Limited Workflow
Oracle & SharePoint Integration

- Provide users with a single web based entry-point
- Store Data within Oracle
- Expand the participants of an Oracle Process
- Leverage investments in Oracle and Microsoft technologies
- Improve Business Processes
DIRTY DATA...
WHAT DOES IT COST YOU?
Root Causes of ERP Pain – Dirty Master Data

Performance Impact
- High Overhead
- Compliance Risk
- Missed Opportunities
- Poor Return on Capital

Business Impact
- Misallocated Costs
- Maverick Spending
- Order Errors
- Production Delays

Process Impact
- Poor Data Quality
- Bottlenecks
- Non-standard Processes
- Poor Data Visibility

Usability Challenges
- Complex UI
- Inflexible Processes
- Mass Data
- Limited Deployment

Point Solutions
Custom Code
“2 Weeks in a Life” Dirty Data + Complex Workflow

Bob fills out an Excel request for part

Mary receives and reviews – 3 days later

Mary gets around to manually adding BOM & routing to Excel sheet

Tom finally walks over to SC management for approval

2 days later Tom completes by scanning an approval pdf and attaching to email

Tom in Supply Chain evaluates sourcing data – but has urgent shipments and has to put this off for a day…

Shared services team in Delhi receives email

Shared services team in Delhi rekeys material, BOM & Routings into Oracle

Most of the time they email Mary with information but usually forget to notify originator

Oracle MD entry team emails Mary

Mary emails Tom and Bob

One part created… elapsed time? At least one week
Business Value Impact – Master Data entry errors

COST DRIVER: Dirty Data

• Food Services Industry

• Wrong suffixes in delivery address street names were costing extra charges from delivery companies.
Business Value Impact – Master Data entry errors

Net Impact?

Company incurred $2M extra charges per annum for bad shipping addresses.
Business Value Impact -
Non-compliant governance associated w. master
data creation

COST DRIVER: Dirty Data

- Food & Beverages Industry

  Lack of data validation and process review results in incorrect units of measure for consumer products.
Business Value Impact - Non-compliant governance associated w. master data creation

Net Impact?

Company’s delivery trucks being “turned around” at state border crossings due to being overloaded…

Doubling delivery expenses with each turn around.
Business Value Impact – Master Data Process Auditability

COST DRIVER: Dirty Data

- Energy Industry

- Lack of process transparency related to data error entry rates on over 60,000 bill of lading transaction
Business Value Impact –
Master Data Process Auditability

Net Impact?

14% of 60,000 bill of lading transactions had data entry errors resulting in thousands of dollars of monthly productivity loss in correcting truck and railcar movements.
Poll #2: What are the key challenges your company faces related to Oracle master data governance processes? Select all that apply. 

…or better said – “what is your dirty data story?”

Select all that apply –

1. Data quality - leading to failing business processes
2. Updating mass numbers of master data records
3. Multiple master data contributors creating massive "churn"
4. Visibility into a master data creation process (KPIs, service level awareness, proactive process management)
5. Rekeying the final master data transaction into Oracle
Automating Master Data Management Workflows for Oracle

ENVISION PERFECT ORACLE MASTER DATA
Perfect Master Data – Simplified & Integrated Workflow

Request Product → MRP creates Bill of Material & Routing → Supply Chain adds packing info → Finance sets the pricing

DMO oversees SLA with complete process transparency

Data steward reviews and updates with one click!
Drag and drop – Adaptable workflow
**Simplifying Complex UIs**

### Item Creation

**Product Planning Process**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Item Name</td>
<td></td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>Organization</td>
<td></td>
</tr>
<tr>
<td>Item Status</td>
<td></td>
</tr>
<tr>
<td>Inventory Item</td>
<td></td>
</tr>
</tbody>
</table>

**Planning View**

Enter your comments and workflow participants below.

**Comments** - 4000 chars left

**Process** - OWItemMasterForm

<table>
<thead>
<tr>
<th>Department</th>
<th>Select...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finance</td>
<td></td>
</tr>
<tr>
<td>Engineering</td>
<td></td>
</tr>
<tr>
<td>Logistics</td>
<td></td>
</tr>
</tbody>
</table>

**WINSHUTTLE**
Flexible process flows
Single & mass creation and maintenance
Drag & Drop Workflow Updates

Adding a master data approval process (sales data segment approval)
Easy governance adaptability…

**New Item is requested**

**Sales updates**

**Purchasing updates**

**Uploads to Oracle eBS**
# Data validation – at point of entry

## Material Creation Request

<table>
<thead>
<tr>
<th>Material Description</th>
<th>HD Monitor 28 inch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Units of Measure</td>
<td></td>
</tr>
<tr>
<td>Base Unit of Measure</td>
<td>EA - Each</td>
</tr>
<tr>
<td>Weight Unit</td>
<td>KG - Kilograms</td>
</tr>
<tr>
<td>Volume Unit</td>
<td>M3 - Cubic Meter</td>
</tr>
<tr>
<td>Basic Measures</td>
<td></td>
</tr>
<tr>
<td>Gross Weight</td>
<td>3.2c</td>
</tr>
<tr>
<td>Net Weight</td>
<td>3.1</td>
</tr>
<tr>
<td>Volume</td>
<td>0.042</td>
</tr>
<tr>
<td>Size Dimensions</td>
<td></td>
</tr>
</tbody>
</table>

### Reason for this Request

- Validate
- SAP Status: Enter a numeric value

## Validate data against Oracle eBS

- Automatically populate picklists with values from Oracle eBS
Process Visibility

Provide management oversight of SLAs, KPIs associated with item (or...) master data creation and maintenance activity
e.g. Item, Customer, Vendor, Pricing, etc.

Dashboard and Reports
• Detailed process status
• Transaction history
• Notification status
• Statistics
Perfect Oracle Master Data …

• Data entry errors no longer exist
• Departments work seamlessly together
• Total process transparency
• Data is created quickly
• Business users can author new processes and make updates to existing ones
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DEMONSTRATION
Architecture
Poll #3: What is your primary use case of interest at this time?

Select one –

1. Material master data creation and maintenance
2. Customer master data creation and maintenance
3. Vendor master data creation and maintenance
4. Bill of Materials creation and maintenance
5. Pricing creation and maintenance
Authoring Oracle - SharePoint Forms & Workflow using Winshuttle Foundation

Create Oracle script with Transaction and Query

Model process with Designer

Build forms with Microsoft Office

Publish to SharePoint

Open form in web browser
The power of Winshuttle

- Empowers business users to automate business processes
- No-programming approach to workflow development
- Short development cycle
- Easy to adapt to changing business processes
About Winshuttle

• 10 years of Making ERP Lives Easier
  • Founded 2003
• 250+ Employees, HQ in Seattle, WA
  – Offices in the UK, France, Germany and India
• 99% Customer Satisfaction Score
• Winshuttle is an Oracle & Microsoft Software Partner
• Products are Oracle & Microsoft Certified

Microsoft® Partner

Gold Independent Software Vendor (ISV)
Next Steps…

Contact us today at…
oracle@winshuttle.com
Thank You / Q&A
Recording and Q&A to be mailed

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Chad Miller / Product Manager