

HFM/FDM Upgrades

CLIENT STATS

General Company Info

- 2013 Rev: \$2.95 billion

Products

- HFM – 100+ Users
- FDM
- BI+ Reporting

Application Highlights

- HFM Redesign
- Chart of Accounts Redesign
- HFM Rules Updates
- EPMA
- Phased Submissions
- USD Overrides
- Additional Custom Dimensions (took advantage of Custom 5 – new in HFM 11.1.2)

Project Overview

Finit has led two upgrade projects for The Client since our original implementation work in 2006. In 2010 Finit upgraded The Client from 9.2 to 11.1.1.3. In 2013 Finit upgraded The Client to 11.1.2.3

Project Highlights

Finit's solution for The Client includes the following features:

- Implemented Phased Submissions
- Implemented a new Admin Feature to Override Validations to allow promotion where needed
- Adjusted USD Overrides to allow for an account with just a specific partner (not the entire account). This was accomplished with a new subroutine in the HFM Rules
- Completed a full EPMA transformation and library build
- Changed the translation method on the P&L to be PVA (periodic value for account)

Benefit

- The project included a redesign of several artifacts inside HFM including the newly available 5th Custom Dimension. This was the first client Finit had helped with this and it was important simply because it is not a simple change to an HFM Application. It means that changes need to be made to the following:
 - HFM Metadata
 - HFM Rules
 - HFM Reports
 - HFM Smart View Formulas
 - FDM Integration