

EPM Suite Upgrade – 11.1.2.3

CLIENT STATS

General Company Info

- 2013 Rev: \$3.7 Billion

Products

- FDM
- HFM
- Essbase
- Planning
- ODI
- EAL
- HPCM

Application Highlights

- Upgrade from 11.1.2.0 to 11.1.2.3
- Assisted with set up and testing of all new systems
- Implemented EPMA
- Applied FDM Smart Merge script
- Implemented Calc-Manager for Planning
- Utilized Org by Period functionality within HFM

Project Overview

The Client underwent an initiative to migrate their existing Hyperion 11.1.2.0 products to Oracle Hyperion version 11.1.2.3. The following products were upgraded as a part of this project: FDM, HFM, Essbase, Planning, ODI, EAL (v.11.1.2.2), HPCM, and Financial Reporting.

Project Highlights

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

- Implemented EPMA, which allowed the Client to take advantage of the latest metadata management functionalities. It also allowed the Client to manage metadata for all products in one place (HFM, Planning, etc.)
- Applied the 'Smart Merge' custom script in FDM. This resolved some major issues related to 'data disappearing' during month end. The Smart Merge allows users to load a data set that erases only the previous data loaded from FDM; thus it ensures you load a full trial balance with every data load while not impacting supplemental data that was loaded through other mechanisms such as data forms.
- Performed a comprehensive review of the Client's HFM rules to ensure consolidations were efficient.
- Created a customized Excel solution to ensure HFM's Intercompany Matching reports would function with the Client's in-house email program.

Benefit

- The Client is a Fortune 100 company that has very large user base for the Oracle EPM Product Suite. For a company of this size that uses several of the EPM Products an upgrade of all of them at the same time is not a simple task. Finit worked with all the various groups at Leggett (IT, Finance, Accounting, FP&A) to the upgrade was complete.
- 11.1.2.3 is the first version that is compatible with IE 10, thus the Client is now able to use IE 10 with all EPM Products.