

Upgrade and Enhancements

CLIENT STATS

General Company Info

- Global Top 25, Third
- Party Logistics Provider
- \$1.5 Billion in Revenue

Products

- Hyperion Planning
- Calculation Manager
- BI+ Financial Reporting
- ODI

Application Highlights

- Management Reporting
- Planning, Forecasting
- Workforce Planning

Project Overview

This project had several objectives. Upgrade environment from version 11.1.1.3 to 11.1.2.2, implement enhancements to support new Oracle R-12 Chart of accounts, implement proper backup routines and performance tune the Essbase databases.

Project Highlights

The Client was faced with a General Ledger Chart of Accounts enhancement to be able to handle more entities in the Entity portion of the COA string. Because of that they also took the opportunity to upgrade their environment and implement best practices around backup and migration procedures.

- Project was broken down into four manageable steps:
 - Step 1: Implement a two environment paradigm. Development / QA and Production. In this step we performed a reverse migration to QA and upgrade the application current state, as well as the ODI routines used to source and update data and metadata. We also implemented migration routines.
 - Step 2: In this step we implemented new accounts and entity dimension hierarchies. As a result of this changes a temporary Essbase application was developed to map the data between current state and future. All reports and ~100 calculations were also updated.
 - Step 3: Implemented enhancements in ODI queries against Oracle R-12, Hyperion Planning relational backend databases and staging tables to support the new Chart of Accounts String and allow for the process to continue updating data and metadata in the Planning Application.
 - Step 4; Implemented DOS backup scripts to run on a schedule to backup all relevant Essbase objects. This batch is able to maintain up to 30 days of object backups for a given application.

Benefit

- The Client wanted to perform the upgrade and enhancements to their environment, as well as, use the opportunity to train their administrator on new functionality. We worked hand in hand with this individual and by the time we had completed the project she was completely self sufficient.