

# HFM and FDM Implementation

## CLIENT STATS

### General Company Info

- Fortune 300
- 2012 Rev: \$10 billion

### Products

- HFM
- FDM
- Essbase
- EAL

### Application Highlights

- Enterprise to HFM
- FDM Upgrade
- Multi-currency
- Process Management
- Automated Fx Rate Analysis
- EPMA Metadata Management
- Data Synchronizations

## Project Overview

The client is a global leader focused on the design, manufacture, and distribution of agricultural machinery. The driving factor of this project was a move to HFM from Enterprise. The client also needed to upgrade old versions of UpStream and Essbase to version 11.1.2.2. The Client was an early adopter of version 11.1.2.2 and was one of Oracle's first customers to utilize the additional custom dimensions. – a new feature that first arrived with 11.1.2.2.

## Project Highlights

Finit's solution for the client includes the following features:

- Inclusion of six custom dimensions to report by Brand, Segment, Product, Source, Function, and DataType.
- EPMA in both HFM and Essbase applications to allow Data Synchronizations between the products. These synchronizations were scheduled via Consolidation Administration Task Flows.
- Essbase Analytics Link (EAL) was installed to provide a real time view of HFM data through an Essbase cube (using and Essbase license).
- Automated allocations were set up in the HFM rules to run when data was loaded with NoProduct and/or NoBrand attached.
- Logic was written in the HFM rules to automatically copy financial data and fx rates to custom scenarios for detailed rate analysis.

## Benefit

- Simplified processes for allocating data and analyzing currency effects.
- Enhanced reporting functionality and transparency using Financial Reporting and Smart View.
- Reduced costs by offloading HFM data into Essbase for Reporting Users; Essbase has cheaper licensing costs.
- EPMA metadata management made sharing hierarchies between HFM and Essbase very simple and provided a detailed audit trail.