

## Finit Solutions Implements Oracle Hyperion Financial Data Quality Management (FDM) at a Fortune 100 Industrial and Commercial Machinery Conglomerate

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### **Oracle Products Implemented**

Hyperion Financial Data Quality Management (FDM)

### **Highlighted Solutions**

New FDM Implementation

FDM Triangulation

Custom FDM Reports

End-user Training

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### **The Client's Goals**

As a result of its size and growth through acquisition, the client had more than 500 general ledger systems in place. The company undertook an initiative for more than 2,000 end-users to map and submit both trial balance and supplemental data into Oracle Hyperion Financial Management (HFM) using Oracle Hyperion Financial Data Quality Management (FDM). Goals for the FDM implementation included:

- To implement FDM for 6 business units, each of which had different HFM applications, processes, and data requirements.
- To accommodate the disparate requirements of the 6 business units while establishing as much commonality and standardization as possible among them.
- To build in the ability to load both trial balance and supplemental data for all locations.
- To help end-users quickly and efficiently develop accurate general ledger to HFM mapping tables.
- To train end-users to map, load and validate their own data each month.

*"We have chosen to partner with Finit Solutions because of their product knowledge, process understanding, financial consolidation domain expertise, strong relationship with Oracle Hyperion and strong commitment to the success of the project.*

*Finit's commitment to the success of the project was evidenced by proactively identifying issues, recommending alternatives and executing solutions in the areas of environment migration, stress testing, data validation and user training."*



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### Our Solution

Finit Solutions created the following solutions to help the client achieve their goals:


**FDM Application Design:** Finit created a unique FDM application for each of the 6 business units' corresponding HFM applications. Separate FDM applications gave the client flexibility to accommodate the different processes and data requirements for each individual business unit. Security design, reports, scripts and FDM naming conventions were shared among all FDM applications. This standardization allowed for ease of maintenance in the future and more efficient project execution.

In addition to setting up trial balance import formats and mapping tables for all 500 locations, Finit created Excel templates to allow users to enter in supplemental data such as roll-forward information, US GAAP adjustments and intercompany detail. The Excel templates and the general ledger trial balance extract provided the complete data submission to HFM.

**FDM Triangulation:** Finit developed a process for working with the divisional users to create general ledger-to-HFM mapping tables before the users had received any training on HFM. Users were required to submit a general ledger extract-to-Hyperion Enterprise (legacy system) mapping table, and then Finit used a triangulation process inside FDM to generate a general ledger-to-HFM mapping table. This greatly reduced the amount of time necessary to develop those maps; without Finit's triangulation process, every end-user would have been required to create the tables manually, with no prior exposure to FDM, the mapping process, or the HFM accounts and dimensions.

**Custom FDM Reports:** Custom reports were created in FDM to provide end users with a bridge showing their general ledger accounts to Hyperion Enterprise to HFM. These reports allowed the data integration effort to progress on schedule and allowed divisions to more quickly learn HFM while working with their existing Hyperion Enterprise accounts. Finit also created custom FDM reports to satisfy internal audit's Sarbanes-Oxley control requirements.

**End-user Training:** Finit Solutions trained business unit administrators early in the process to get them involved and to help facilitate the best design. Finit consultants and client team members also spent time with the end users to develop, reconcile and hand off their mapping tables. This time included initial kick-off sessions, formal training, post-training follow-up calls and one-on-one support during the parallel testing process.



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### **The Client's Benefits**

Without Finit's experience and assistance, the client's business units would have had a much more difficult time integrating with HFM, as many of the sites had no existing mapping tables to the legacy system (Hyperion Enterprise). Finit's custom reports, along with FDM's built-in audit trail, allowed users to see where their data was mapped and to understand why differences occurred. Reconciliation was much simpler by understanding all of the inputs into HFM and correcting items that were mapped incorrectly. The triangulation process was also instrumental, as users had to begin their data integration effort before they had been trained on HFM and understood HFM's custom dimensions.

By relying on Finit's FDM expertise, the company was able to implement disparate FDM applications with the right balance of uniqueness, flexibility, and standardization across the organization. Finit's FDM triangulation methodology of working with the divisions first in Hyperion Enterprise (legacy system) terms and then triangulating the data into HFM maps allowed the company to meet its deadlines with as little effort and confusion among end-users as possible. Over 2,000 end-users now submit their monthly and quarterly trial balance and supplemental data via their respective FDM applications and fully control their own data submission processes.

### **Efficient Delivery of Effective Solutions**

Finit Solutions specializes in the design and implementation of Oracle Hyperion Enterprise Performance Management Solutions. From upgrades to designs to full implementations, Finit consultants apply their expertise in Hyperion Financial Management (HFM), Hyperion Financial Data Quality Management (FDM), Hyperion Enterprise, Hyperion Essbase, and Hyperion Planning to deliver concrete, effective solutions to meet your Finance IT needs.

Finit's approach on every project is to ensure that we exceed our clients' expectations, and we are proud to say that 100% of our clients serve as references. We pride ourselves on recognizing that each of our clients has unique goals, issues, and constraints, and each client deserves a solution that is developed, designed, and executed with that uniqueness in mind. Finit does not apply boilerplate solutions. We work as a team to look out for our clients' best interests and to find the *best* solution for every issue on every project, every time.