

Finit Solutions Implements Oracle Hyperion Financial Management (HFM) and Oracle Hyperion Financial Data Quality Management (FDM) at a Top HVAC Company

Oracle Products Implemented

Hyperion Financial Management (HFM)

Hyperion Financial Data Quality Management (FDM)

Hyperion Financial Reporting

Hyperion Smart View

Highlighted Solutions

Hyperion Enterprise to HFM Conversion

FDM Upgrade

Cell Text

FDM Supplemental Templates


FDM Triangulation

The Client's Goals

As the number of users requiring access to Hyperion Enterprise continued to grow, the company realized that their current model of deploying Hyperion Enterprise via Citrix was not scalable enough to handle the volume of users that needed access to the application. In addition, the company needed a tool that offered more flexible options for data collection and analysis. Goals for the project included:

- To deploy a scalable, web-based tool that would not require any software to be loaded locally on users' machines or any use of Citrix.
- To develop a more flexible tool for storing and retrieving textual data. Hyperion Enterprise and Hyperion Data Extend only allowed users to view textual data for the current period; textual data was not rolled over each year.
- To avoid manual re-entry of construction contract and bond information each month for information that has not changed since the prior month.
- To convert users' source-to-Hyperion Enterprise mapping tables into source-to-HFM mapping tables with as little end-user effort and confusion as possible.

"The consultant's attitude, professionalism, work ethic, and overall customer service were superior. The end-user training and knowledge transfer that he provided were very useful and effective. I would request this consultant again in the future and would absolutely serve as a reference for him to his other potential clients."



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Our Solution

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

Cell Text: Much of the company's monthly supplemental data submission involves textual data to explain various balances. Hyperion Enterprise's Data Extend did not allow the textual data to be rolled over from Actual to Prior; therefore, users could not retrieve historical textual data from Data Extend. Finit built numerous HFM web forms and reports to facilitate the entry and presentation of supplemental textual data, and the extended dimensionalities in HFM allow users to retrieve that data for any year and period.

FDM Supplemental Templates: The company requires users to submit textual supplemental data regarding contracts and associated bonds that may not change significantly from one month to the next. Users spent a significant amount of time re-entering this data each month into Hyperion Enterprise Schedules. Finit designed FDM templates to enable users to copy and paste data from the prior month to the current month, make changes for the current month, and then load the templates into FDM, with the textual data exported to HFM as cell text. Validation rules were set up in FDM to verify that the templates submitted contained valid and complete data in the required format.

FDM Triangulation: The company had already been using FDM to integrate with Hyperion Enterprise; therefore, the users already had existing maps from their source systems to the Hyperion Enterprise accounts. Instead of having every user individually perform the mapping exercise to map their source systems to HFM dimensions, Finit developed an FDM triangulation process to ease the burden and confusion for the users. In order to load historical data from Hyperion Enterprise to HFM, FDM maps were created to map Hyperion Enterprise accounts to HFM dimensions. The FDM triangulation process involved combining the existing source system to Hyperion Enterprise maps for all FDM locations with the Hyperion Enterprise to HFM maps. This triangulation automatically converted all the users' original Hyperion Enterprise maps into source system to HFM dimension maps. The process proved to be very efficient and effective and required only a few hours for one person to triangulate all maps for all entities, instead of having users from each entity spend numerous hours mapping all their accounts to HFM. Furthermore, the potential for mapping errors was significantly lowered from that of the manual process.



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The Client's Benefits

Finit helped the client deploy a stable, scalable, web-based tool for data collection, consolidation, and reporting. Users no longer encounter issues with getting locked up or logged off, as had been experienced with the deployment of Hyperion Enterprise via Citrix.

Users can now enter and report on the large amounts of supplemental textual data that they provide every month, and this data is available to them for all previous years and months. Users no longer have to re-enter data that has not changed from the prior month, because the FDM templates that Finit developed allow them to copy and paste prior months' data forward before loading each month.

One of the client's main concerns about converting from Hyperion Enterprise to HFM was the amount of time it would take for end-users to learn the new system and to develop new mapping tables from their source systems into the new HFM dimensions. Finit's FDM triangulation process made this process seamless for the end-users; their existing Hyperion Enterprise mapping tables were automatically converted into source system to HFM mapping tables within FDM. This saved the end-users a tremendous amount of time and made the conversion much simpler and less intimidating for everyone.

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.