Hyperion Planning Management Reporting Redesign

CLIENT STATS

General Company Info
- US Subsidiary of Ricoh Americas
- One of the leading document outsourcing companies
- 2011 Rev: $23 billion

Products
- Hyperion Planning
- HFM
- FDM
- Financial Reports
- SmartView

Application Highlights
- Shared FDM maps
- Database redesign
- Web forms, task lists, work flow implementation

Project Overview

The Client was acquired by Ricoh, requiring Ricoh data to be integrated into the Client systems. The Client had implemented Planning several years before but was using the environment as if they only had Essbase. Utilization of Planning forms, task lists, work flows or other features didn't exist. There was inconsistency of data, restatements were common, and Planning did not tie to HFM or between Planning databases, which required analysts to validate the data before they could analyze it. The goal of the project was to provide consistent data in both HFM and Planning while implementing performance improvements and best practices.

Project Highlights

Finit's solution for the Client includes the following features:
- Redesigned the Planning databases, combining two into one, and sharing common dimensions between the remaining two applications.
- Realigned and reduced the number of dimensions, providing a user-intuitive design incorporating partitioned ASO databases for historical data no longer being calculated.
- Redesigned the FDM process, using child locations with shared maps to feed both HFM and Planning, ensuring data integrity for all data going forward.
- Historical data was analyzed, cleaned, validated and reconciled prior to combining and loading in the new databases. All supplemental data is now loaded through FDM, providing an audit trail for changes to actual data.
- Redesigned security, preventing lock and send capability to Planning databases, even for the administrator.
- Provided full project management, risk management, status reporting and oversight of Client and Finit staff.

Benefit

- Database designs were simplified, providing a better user experience and performance improvements, allowing for multiple data loads and calculations per day.
- Data sourced from the same files and loaded to both HFM and Planning, sharing FDM maps.
- Best practices were implemented to provide a structure around all data movement and ownership.
- Planning features included: forms, task lists, workflow, and standard reports that were included in the redesign.

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Hyperion Planning Budgeting and Forecasting Implementation

CLIENT STATS

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- Worldwide leader in the office imaging equipment industry

Products
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- Financial Reports
- SmartView

Application Highlights
- Client staff were primary resources
- Simplified dimensionality
- Full Planning features implementation
- Custom FDM integration

Project Overview
The Client made a strategic decision to replace COGNOS with Hyperion Planning. The management reporting databases being utilized in Hyperion Planning were too complex for budgeting and forecasting due to the number of dimensions, causing users to have great difficulty in finding their data at the lowest level. The Client wished to replicate driver-based planning currently in COGNOS and have their staff build as much of the application as possible. However, the COGNOS team required education and guidance with the new development of this application.

Project Highlights
Finit's solution for the Client includes the following features:
- Led each step of the implementation, laying out options with pros and cons regarding maintenance, usability, performance and data integration.
- Prototypes were developed to visualize the metadata and user experience. After teaching the Client staff how to perform each task and sharing best practices, the Client assumed responsibility for its completion.
- Complex calculations and business rules were developed by Finit with knowledge transfer to the the Client team for their maintenance.
- Developed a data integration process utilizing FDM with custom import scripts that allowed the mapping and movement of 12 periods at once between the new budgeting application and the existing management reporting application.
- Security was designed to utilize existing groups created for management reporting.
- Throughout the project, Finit provided support, knowledge transfer, guidance and examples.

Benefit
- A simplified database design provided an easier user experience.
- Full Planning features , including forms, task lists, workflow and standard reports were included in the design.
- Custom FDM import scripts and mapping were utilized to move data between an 8 dimension application and a 12 dimension application.

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