

41370: I already have Hyperion Planning. Why should I upgrade to System 9 and what should I expect?

Presenter Information

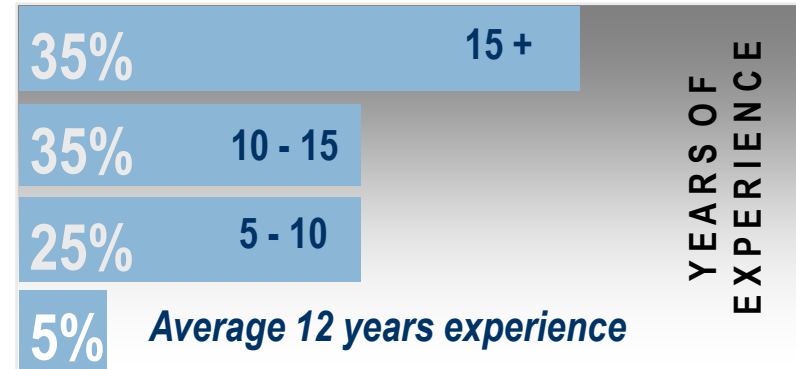


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Hackett Technology Solutions

World-Class Defined and Enabled

- Certified Oracle Implementation Partner since 1995
- Completed over 350 Oracle and PeopleSoft implementations, upgrades and optimization projects
- Implementing Oracle Solutions based on Hackett-Certified™ Practices



- Highly skilled consultants
- Large-scale Oracle implementation experience
- Average 7 years Oracle experience, 12 years business experience



Planning Clients



Agenda

- Why should I upgrade?
- Introduction to Hyperion System 9 Planning
- Migration to Hyperion System 9 Planning
 - Benefits
 - Process Overview
- Q&A

Why Upgrade?

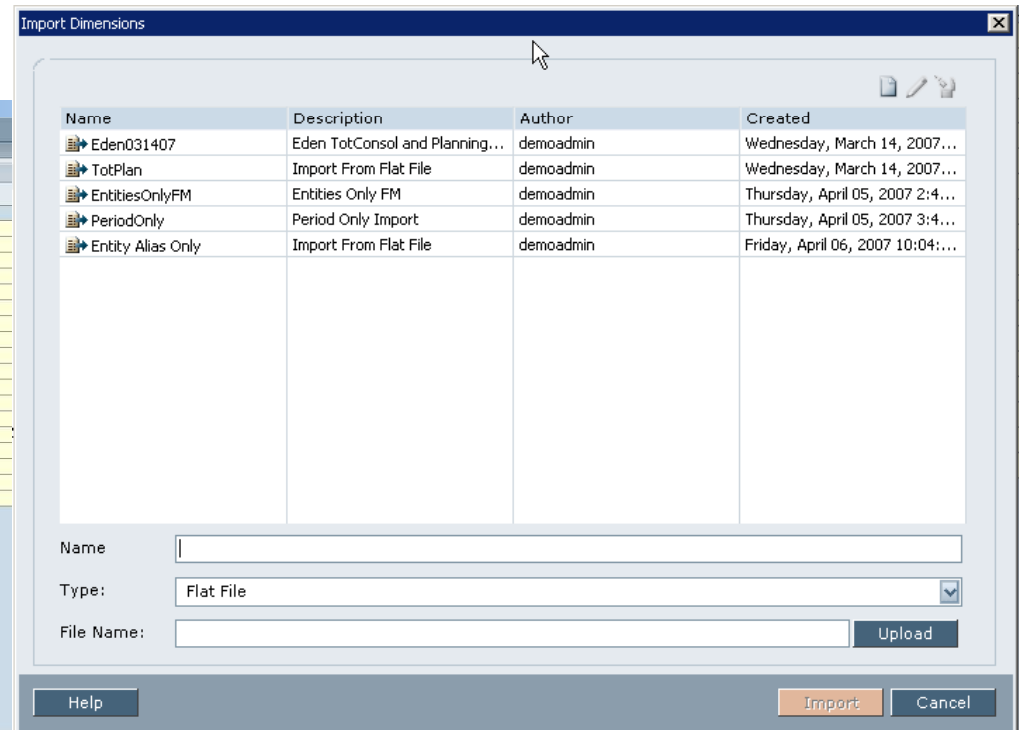
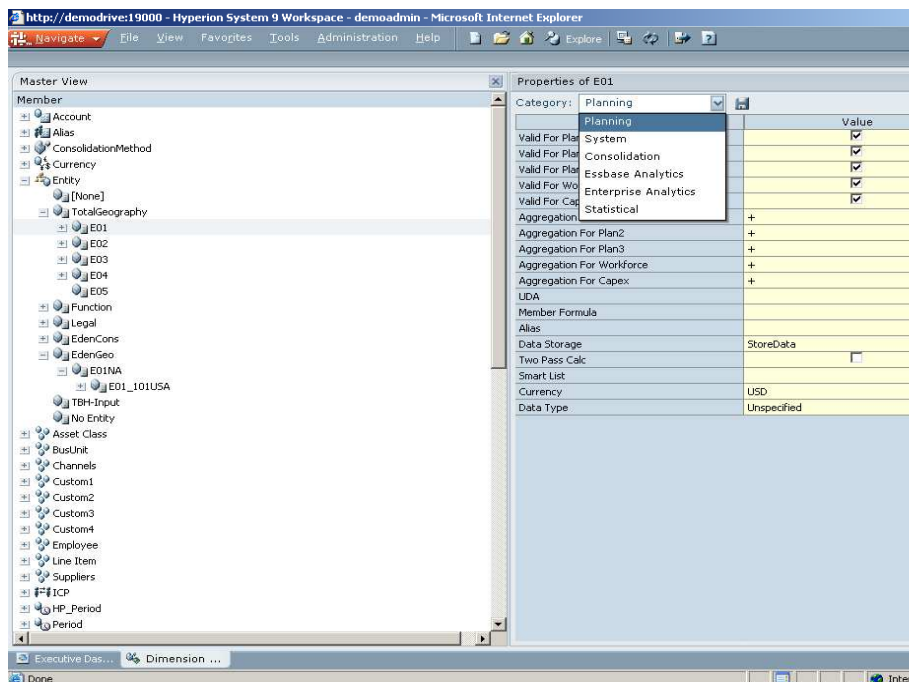
- Infrastructure Enhancements
- Centralized Dimension Maintenance: EPMA
- Centralized Security: Shared Services
- Centralized Reporting: Workspace
- Planning Enhancements
- Office Enhancements

Infrastructure Enhancements

- Hardware advancements
- IT Standards Compliance
- Common Installer

EPM Architect Overview

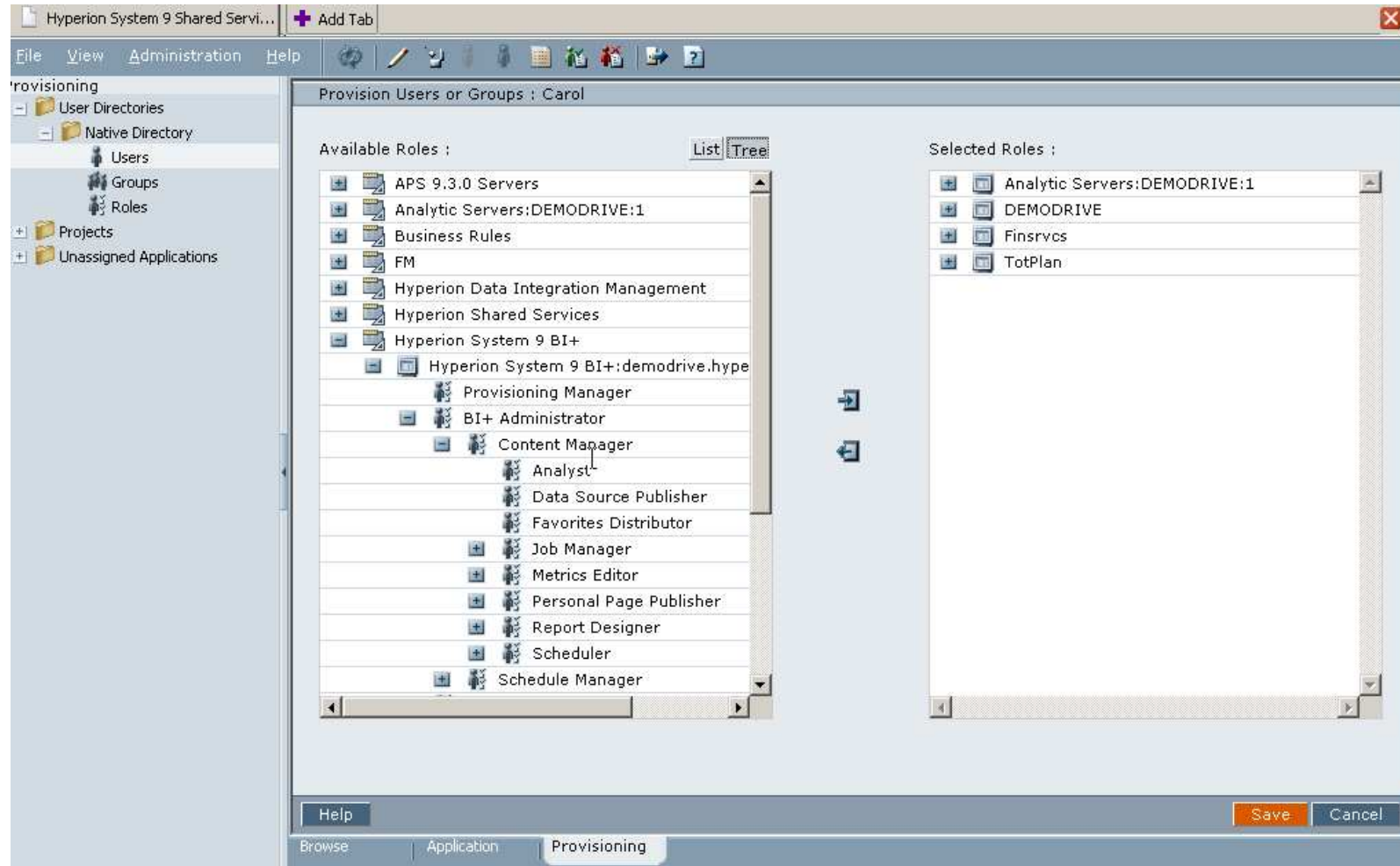
- ❑ Part of Hyperion System 9 Foundation Services
- ❑ An integrated environment for building, deploying, and managing Hyperion System 9 Applications
- ❑ Dimension Library enables ability to create and manage dimensions and dimension properties for applications across products
- ❑ Centralized Dimensions, Data Sync



Centralized Security

- Shared Services
- Segregation of Security Roles
 - Right to add Users
 - Right to provision capabilities to Users
- Native Users
- MSAD Groups
- Calculation Security

Security Provisioning



Reporting

- Workspace serves as Financial Reporting Portal
- Single Sign On and Single End-User Experience
- Users see only their application and their content
- Subscription to Reports as Data is Updated
- Home Page with Favorites

The screenshot displays a Hyperion System 9 Workspace reporting dashboard. The main content area is divided into several sections:

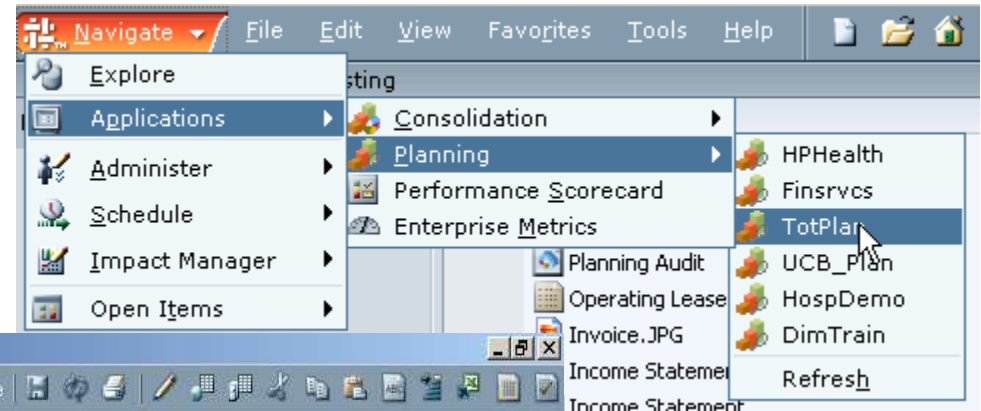
- Forecast vs Plan (Current Qtr):** A bar chart comparing Plan Sales (blue bars) and Forecast Sales (yellow diamonds) across six regions: North America, Europe, APAC, Latin America, Africa, and Middle East.
- Pipeline by Product by Geography:** A 3D bar chart showing sales for Audio Systems, DVDs, Televisions, and VCRs across five geographies: North America, Europe, APAC, Latin America, and Africa.
- Top 10 Customers (Current Qtr):** A bar chart showing sales for ten different customer categories.
- Balance Sheet:** A table showing financial data for 'Actual' performance.

	Actual
Current Assets	\$942,309,183.80
Fixed Assets	\$681,270,958.50
Other Assets	\$178,251,793.20
Total Assets	\$1,801,831,935.50
Current Liabilities	\$555,147,937.30
Long-Term Liabilities	\$694,862,009.40
Total Liabilities	\$1,250,009,946.70
Total Shareholder's Equity	\$551,821,988.80
Total Liabilities and Equity	\$1,801,831,935.50
- Quick Links:** A list of navigation options including Financial Management, Budgeting & Forecasting, Sales Dashboard, Finance Dashboard, Operations Dashboard, and Human Resources App.
- Alerts:** A list of notifications such as Customer Sat & Mkt Share, Net Income Below Plan, Revenue Below Plan, and Code of Conduct Training.

Below the dashboard is a screenshot of a file explorer window showing a folder structure for '/Eden/Planning and Forecasting'. The files listed include various reports like 'Travel Detail', 'Strategic Analysis', 'Revenue by Segment', 'Planning Audit', 'Operating Leases', 'Invoice.Ppt', 'Income Statement', 'Income Statement - Trend', 'Income Statement - Pct of Net Sales', 'Income Statement - Pct of Net Sales', 'Income Statement - Act vs Plan', 'Income Statement', 'Income Statement', 'Header', 'Forecast - Compare Versions', 'Forecast - Compare Versions', 'Employee Status Report', 'Eden Month End Financial Statements', 'Eden Logo', 'Department Variance Report', 'Consolidated', 'Consolidated IS', 'Compensation Report', 'Cash Flows', 'Capital Expense Summary', 'Capital Expenditure Detail', 'CapEx Example.ppt', 'Balance Sheet', 'Account Detail Report', '8. Capital Analysis', '7. Property Tax Detail', and '6. Facilities & Equipment'.

Workspace Integration

- ❑ Tabbed view of content
- ❑ One interface. Seamless navigation for applications, reporting and administrative content



http://demodrive:19000 - Hyperion System 9 Workspace - demoadmin - Microsoft Internet Explorer

TotPlan

Page Costa Mesa - S

Page Working

	Mar	Apr	May	Jun	Jul	Aug
Beginning Enrollment	1,060	5,410	5,660	5,810	5,890	5,9
New Enrollments	5,000	500	400	330	330	3
Graduates	600	200	200	200	200	2
Drops	50	50	50	50	50	
Ending Enrollment	980	1,060	5,410	5,660	5,810	5,970
RevPSTD	30	30	30	30	30	30
Teaching Days	21	18	21	20	21	21
Total Revenue	617,400	572,400	3,408,300	3,396,000	3,660,300	3,534,000
	3,761,100	3,811,5				

	Working	Target	Target Var
Operating Revenue	36,994,200	125,851,348	(88,857,148)

Financial Reporting

General | Financial Reporting Studio

Default Preview Mode

HTML Preview

PDF Preview

Export to Office Application:

Office 2002 or higher

User Point of View

Preview

Off

On

Location of Point of View

In View Pane

Above Report/Book

Setup Members...

Merge Equivalent Prompts

Thousands Separator

Comma

Period

Underscore

Space

Decimal Separator

Comma

Period

Underscore

Space

Help OK Cancel

Planning Usability Enhancements

- Managing Member Formulas & UDA's has been moved to the web
- Interactive Menus
- Administration of Exchange Rates & Refresh moved to Web
- Improvements to Business Rules

Functionality Enhancements

- Copying data across Scenario/Version Combinations
- Smart Lists
- User Variables
- Tasks Lists/Workflow
- Offline Planning
- Pre-Built Modules
 - Workforce Planning
 - Capital Expense Planning

Data Form Enhancements

- Split Grid (Composite Grid)
- Date and Text in Cells
- Hide forms
- Run Calculation on Form Load
- Task List Reporting

Composite Data Forms

- ❑ Combine multiple data forms on one screen
- ❑ Enter data on one data form and view results in another
- ❑ Choose the order data forms are displayed on the screen

	FY07	FY08	FY09	FY10	FY11	FY12
	±YearTotal	±YearTotal	±YearTotal	±YearTotal	±YearTotal	±YearTotal
Total Existing	17,917	20,000	20,000	20,000	20,000	20,000
Total New	83	1,000	1,000	1,000	1,000	1,000
Total All	18,000	21,000	21,000	21,000	21,000	21,000

	Asset Descr	Asset Units	Asset Rate	Basic Cost	Purchase D.	In Service I	Salvage	P
Buildings	Line Item 1 Building A	1	100,000	100,000	12/28/07	12/29/07	1,000	High
Furniture and Fixtures	Line Item 1 Office Furnit	1	5,000	5,000	3/1/07	3/1/07	500	High
Furniture and Fixtures	Line Item 2 Chairs	1	5,000	5,000	7/24/07	8/1/07	500	High
	Line Item 4 bigger chair	1	10,000	10,000	8/24/07	8/24/07	0	Mec
Office Equipment	Line Item 1 New Aeron c	1	1,000	1,000	12/12/07	12/31/07	300	High
Vehicles	Line Item 1 Sales Manag	1	30,000	30,000	3/1/07	3/1/07	5,000	High
Vehicles	Line Item 2 Cars for Exe	5	50,000	250,000	7/2/07	7/2/07	25,000	Mec
Computers	Line Item 1 Lenova Lapt	20	4,000	4,000	3/1/07	3/1/07	500	High
	Line Item 2 HP	1	40,000	40,000	10/2/07	10/22/07	2,000	High
	Line Item 3 Oracle EPM	1	2,000,000	100,000	1/18/08	2/1/08	0	High

Text in Cells

http://demodrive:19000 - Hyperion System 9 Workspace - demoadmin - Microsoft Internet Explorer

Page: Costa Mesa - South Coast Learning Center Plan Working Go

Page: Insurance Go

	FY07	FY08	FY09	FY10	FY11	FY12
	+YearTotal	+YearTotal	+YearTotal	+YearTotal	+YearTotal	+YearTotal
Total Existing	17,917	20,000	20,000	20,000	20,000	20,000
Total New	83	1,000	1,000	1,000	1,000	1,000
Total All	18,000	21,000	21,000	21,000	21,000	21,000

		Asset Description	Asset Units	Asset Rate	Basic Cost	Purchase D.	In Service I	Salvage	Priority
Buildings	Line Item 1	Building A	1	100,000	100,000	12/28/07	12/29/07	1,000	High
Furniture and Fixtures	Line Item 1	Office Furniture	1	5,000	5,000	3/1/07	3/1/07	500	High
Furniture and Fixtures	Line Item 2	Chairs	1	5,000	5,000	7/24/07	8/1/07	500	High
	Line Item 4	bigger chair	1	10,000	10,000	8/24/07	8/24/07	0	Medium
Office Equipment	Line Item 1	New Aeron Chair	1	1,000	1,000	12/12/07	12/31/07	300	High
Vehicles	Line Item 1	Sales Manager - New Auto	1	30,000	30,000	3/1/07	3/1/07	5,000	High
Vehicles	Line Item 2	Cars for Execs	5	50,000	250,000	7/2/07	7/2/07	25,000	Medium
Computers	Line Item 1	Lenova Laptop	20	4,000	4,000	3/1/07	3/1/07	500	High
	Line Item 2	HP	1	40,000	40,000	10/2/07	10/22/07	2,000	High
	Line Item 3	ERP	1	2,000,000	100,000	1/18/08	2/1/08	0	High

Dates in Cells

http://demodrive:19000 - Hyperion System 9 Workspace - demoadmin - Microsoft Internet Explorer

TotPlan

Currency: Local

Page: Costa Mesa - South Coast Learning Center Plan Working Go

Page: Insurance Go

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Computers	Line Item 1 Lenova Laptop	20	4,000	4,000	3/1/07	3/1/07	500	High
	Line Item 2 HP	1	40,000	40,000	10/2/07	10/22/07	2,000	High
	Line Item 3 ERP	1	2,000,000	100,000	1/18/08	2/1/08	0	High

This cell is read-only

Mass Allocation

- After the rule executes, refresh the grid to see the result of the mass allocation
- Role based security is enforced similar to Business Rule
- Allocate data values across multiple dimensions
- Allocation based on Data values: proportional and relational spread
- Allocation based on patterns: Fill, and evenly split.

Grid Spreader

- Spread data values across multiple dimensions on the grid
- Allocation based on Data values: Proportional spread.
- Allocation based on patterns: evenly split.
- Spreads the data in the active grid, giving users immediate feedback and opportunity to review outcome.
- Data Forms must be enabled to use Grid Spreader.

Offline Planning Overview

- ❑ Offline Planning - work with data while not connected to the Planning application
- ❑ Work with Offline MyAnalytics cube

The screenshot displays the 'Connection Manager' dialog box. It contains a table with the following data:

Name	Provider	Application/Cube	URL
ASO Time	Analytic Provider Services	RetTime/RetTime	http://demodriv
AVGOPLAN-FIN	Analytic Services Smart View Provider	AVGOPLAN/Finstmt	http://10.12.68.
EdenGL	Analytic Provider Services	EdenGL/GL	http://demodriv
EdenHVE	Analytic Provider Services	EdenSale/HVE	http://demodriv
EdenSale	Analytic Provider Services	EdenSale/NewSale	http://demodriv
HPHealth	Planning	HPHealth/Pandl	http://demod
Hyperion S9 BI+	Hyperion Smart View Provider for Hyperion System 9 BI+		http://demodriv
Level3_Demo	Offline Planning	TotPlan	localhost

The context menu for 'Level3_Demo' includes the following options: Select Form..., Instructions, **Take Offline**, Sync Back To Server, and Refresh Offline Definition.

- ❑ Robust support for web-based Planning functionality including offline calculations and business rules

Capital Expense Planning

What can you do with it ?

- Plan for new asset purchases
- Plan for Depreciation/Amortization calculations
- Plan for actions on existing assets
- Plan for driver based/user defined asset related expenses
- Capital purchases process management (future release)
- Report on Assets

What it is not meant to be?

- Capital Asset Inventory and Tracking system
- Fixed Asset System

Workforce Planning

- Ability to have 4 Plan Types/Databases/Cubes in your Planning Application
- Purpose built Salary Planning Application that can be customized
- Ability for end user to add specific criteria for New Hires
- Take advantage of Pre-Built Calculations

SmartView for Office

- Persistent links to other Excel documents
- Direct updates in Powerpoint, Word, Excel
 - Automate Powerpoint Decks!
- Offline Planning improvements

Common Upgrade Approaches

1. Basic upgrade
2. Additional work to modify design to take advantage of System 9 enhancements
3. Full application redesign around System 9

Upgrade Process Overview

- Server Sizing & Selection
- Hardware Setup
- Software Installation
- Planning Migration
 - Relational Components
 - OLAP Components

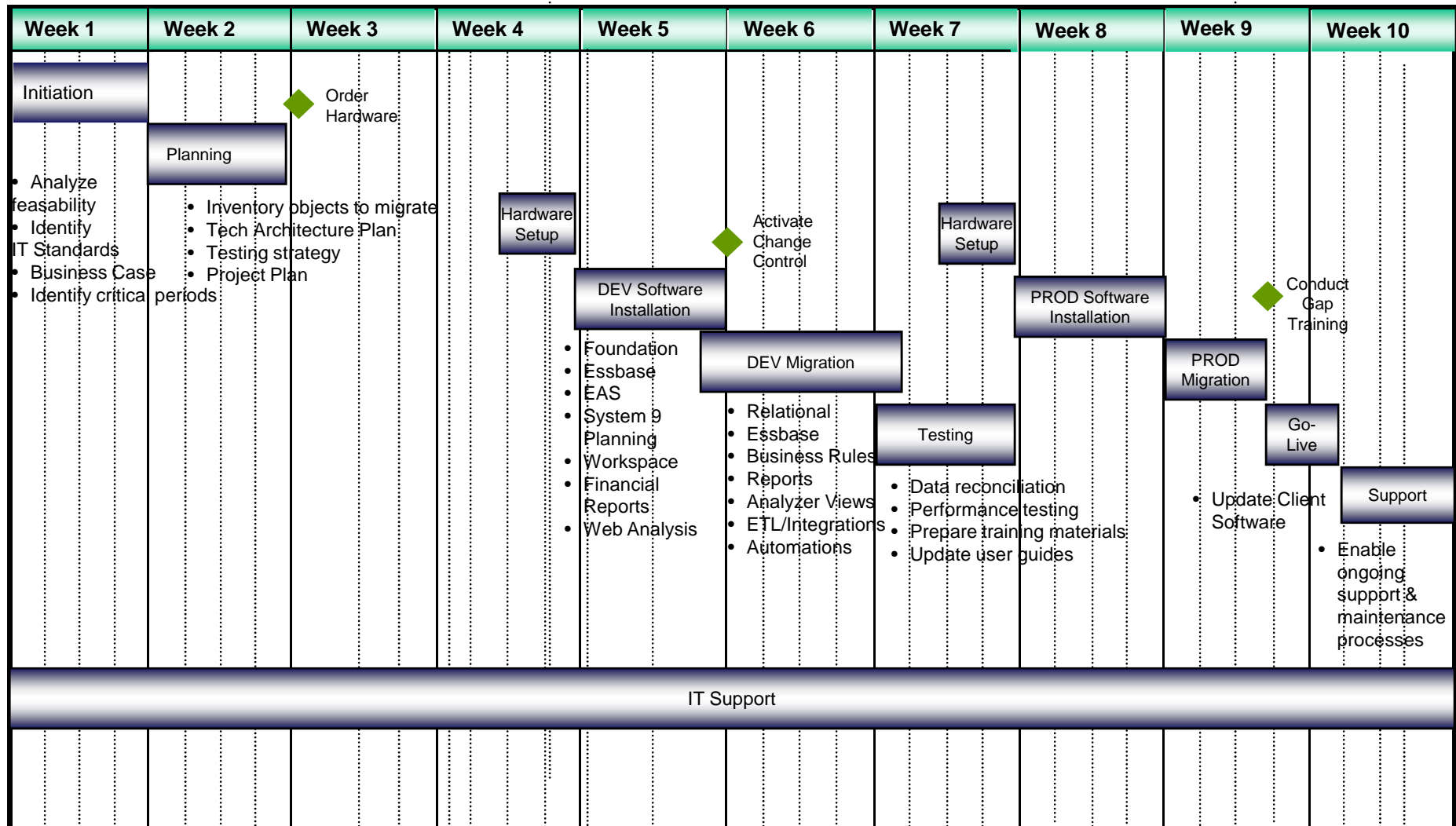
Process Overview (Continued)

- Report Objects
 - Hyperion Reports
 - Analyzer Views
 - Interactive/Brio Reports
- Other Objects
 - HAL Integrations
 - Esscmd/MaxL Scripts & Related Automation Files
 - Scheduled Processes

Things to think about

- Users & Groups will migrate from 4.x Application to Shared Services
- Reports security and view security will need to be configured
- Make sure old users have been deleted from Planning 4.0 repository
- Lock-and-send for planning users
- Instances in Shared Services
- HspJSHome.Properties File goes away

Project Timeline & Key Activities



After Software Upgrade

- Review Security Groups & Configuration
- HAL/ETL considerations
- Workforce Planning
- Capital Planning
- Interactive Reporting
- Web Analysis
- Automate Powerpoint Decks

Final Words

- Success Stories
- Q&A