Reduction in Planning Calculation Process from 24 Hours to Less than 90 Minutes!

This company is a global manufacturer of physical infrastructure solutions that support power, communications, computing, control, and security systems. The company has a global coverage of more than 4,000 employees with support in over 120 countries.

Situation

As a global manufacturing leader, this company invests in technology to improve the visibility of operational and financial performance. They utilize Oracle® E-Business™ (EBS) for daily operations, Oracle Human Resources™ (HR) for all management and Oracle Fixed Assets™ for asset management. They also turned to Oracle for their financial planning and reporting needs and implemented Oracle Hyperion Planning™ to sunset their previous Business Objects® reporting and manual Microsoft Excel™ budgeting. However, the initial implementation failed to meet user's expectations. Additionally, the company wanted to leverage both Workforce Planning and Capital Asset Planning (CapEx) modules within the Hyperion Planning product suite. Overall, the company had several issues to resolve from a poorly designed and poorly implemented solution, as well as additional concerns, including:

- Non-functional ERPi drill-down integration
- 24 calculation process
- Inability to provide decision-makers with accurate reports
- Poor knowledge of the initial solution design led to an inability for the administration team to support the system

Solution

The company turned to Key Performance Ideas, a leader in implementation of Hyperion Planning technology and financial forecasting and reporting solutions. To overcome the initial concerns of the overall solution, Key Performance Ideas completed a design review and delivered re-design approach and implementation methodology. Taking into account that the company needed to continue their financial planning procedures while mending the Hyperion Planning system, Key Performance Ideas produced a two phased implementation plan.

Phase 1: Key Performance Ideas helped the company utilize the initial system for basic calculations and data loading, while moving the total number of dimensions from 15 to eight. Key Performance Ideas also applied Oracle's ASO technology to help the company manage the reporting of the initial 15 dimensions. Additionally, Key Performance Ideas designed both Workforce Planning and CapEx module solutions for 441 global departments and over 4,000 employees. These solutions included actual expenses from the company's GL, including 400 GL account numbers that are used for budget purposes as well as headcount and employee salaries from HR. The design also leveraged built-in currency conversion for each entity.

Phase 2: Phase two of the project was the final implementation of the solution based on Key Performance Ideas' re-design. This phase provided three key deliverables across solution development, integration and testing, and training and included the following as outlined in the table below:

Solution	• Data validation plan
Development	• Unit testing • Quality assurance reviews • Security matrix • End user software inventory • Product installations • Test plan • Test scripts • Training plan
Integration and Testing	• Validation of the re-designed solution • Performance testing and tuning • End-to-end integration testing • User acceptance testing (UAT)
Training	• User training • Documentation to support administration and maintenance of the new solution • Knowledge transfer session with the identified administrators

Benefits Achieved

After suffering from a poorly designed implementation of Hyperion Planning, this company turned to Key Performance Ideas to help their finance organization meet their overall objectives of a new world-class financial planning solution. Today, the company is leveraging Hyperion Planning, as well as its Workforce Planning and CapEx modules , to manage their entire planning process, globally. Not only do they have a scalable solution to allow for future growth, the company was able to remove seven dimensions from their old application. And, most critically, users and the administration team within finance are knowledgeable and comfortable with the new application to support the solution. Key Performance Ideas met the go-live timeline and also helped the company **reduce the overall planning and budgeting calculation process from 24 hours to less than 90 minutes!**

Key Performance Ideas