

Making the Switch from Hyperion Enterprise to Hyperion Financial Management

WHITEPAPER

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Executive Summary

Hyperion HFM was first released more than 15 years ago, yet, for a variety of reasons—primarily required functionality and cost—many companies have still not migrated from Hyperion Enterprise. Many companies may feel that Hyperion Enterprise meets all of their consolidation requirements, or that Hyperion Financial Management (HFM) is too complex, will be too expensive to implement, or will require additional training for users. But while change is never easy, there are compelling reasons why companies should consider migrating to a more current platform now.

1. Support for Hyperion Enterprise ended in 2013.
2. Starting with the release of Oracle Hyperion v11, a number of new features are available that can mitigate the cost of upgrading through increased productivity, streamlined operations, and increased compliance capability.
3. For publically traded companies, the additional capabilities of HFM may now be required to meet changing reporting and audit requirements as well as new accounting standards – e.g., IFRS, Sarbanes-Oxley, regulatory reporting and local reporting needs.
4. HFM's smaller footprint better meets the needs of remote offices and users while reducing the overall effort and cost of supporting these users.
5. Increased need for transparency in data handling, control and acceptance.

These external developments serve to mitigate previous concerns or complacency about moving to a more current Hyperion platform. The growing cost of not being on a fully supported platform now outweighs the cost of migration. Moreover, the additional capabilities in the latest version of HFM can help mitigate the cost of migration by offering new more efficient approaches to financial consolidation, data migration and handling, and reporting and analysis that ultimately save companies time and money. And finally, HFM may now be required to meet changing reporting and both internal and external audit requirements.

This whitepaper will explain how these developments provide compelling reasons to migrate, detail key migrations issues and considerations for IT and financial departments, the similarities and differences in dimensions and calculations across both platforms, and will provide practical steps for implementation.

Hyperion Enterprise—Is it Still a Viable Option?

There are five primary factors that could negatively impact Enterprise financial solutions:

1. Hyperion Enterprise Is No Longer Supported.
2. Changes in regulatory requirements that require an increased complexity of results analysis that is outside the bounds of Enterprise capabilities and must be handled outside of the consolidation system.
3. Limited capability to control, manage and reconcile consolidation processes from data population to reporting continues to be at issue. Processes such as inter-company reporting, data reconciliation and sign-off continue to be handled outside of the consolidation system requiring greater scrutiny and cost of compliance.
4. Hyperion Enterprise's underlying technology is becoming more costly and difficult to support and less capable of living within the IT environment represented today.
5. Enterprise lacks the capability to interface with other, more complex, solutions such as general ledger or budgeting solutions making it increasingly difficult to support the data needs of other applications.

Hyperion Enterprise Is No Longer Supported

In 2012, Oracle announced that they will no longer release updates for Hyperion Enterprise. In 2013, Hyperion Enterprise moved to a “sustaining support” status, which means customers will continue to “receive technical support, including access to [Oracle] online support tools, knowledgebases, and technical support experts,” as long as their Oracle support maintenance is current. The key items absent at this level of support are certification with new third-party products/versions such as Microsoft Office and operating systems, which means that updates and fixes would not be forthcoming. For those companies that require the consolidation application be running on a supported version of software, Oracle’s current plan for the Sustaining Support level will not meet this requirement. More importantly, as a key system for financial close, the risk of running a non-compliant system may require special procedures and mitigation steps to maintain compliance capability.

Changes in the Regulatory Environment

Changes in the regulatory environment, including reporting and auditing requirements, will also drive financial management software migrations. One such change is the possible adoption of International Financial Reporting Standards (IFRS) in the United States. IFRS is supposed to synchronize accounting standards around the globe so that particular types of transactions and events are reported in a similar fashion. The goal is to make international comparisons as easy and accurate as possible. In the United States, the Securities and Exchange Commission (SEC) has been researching whether IFRS is actually consistently applied globally and how effective it is for comparing reporting. The SEC will then decide if, and how, IFRS will be applied in the U.S. Options include continued use of U.S. Generally Accepted Accounting Principles (GAAP), a slow convergence of GAAP and IFRS, or a total conversion to IFRS. As this clarity has been slow to occur, Hyperion Enterprise may not be able to handle multiple formats and require significant development to adopt changes when presented.

Regardless of whether the final decision regarding IFRS is a slow convergence or total adoption, consolidation applications will require modifications to report under the new standards. In the interim, companies must also be prepared to report in different formats as required by local reporting entities. Companies must consider whether that work should be done within Hyperion Enterprise, or whether it would be more cost-effective to combine this effort with a migration to HFM.

Increased Transparency and Control of Processes

Apart from the potential adoption of IFRS, control and audit requirements have steadily increased since the passage of the Sarbanes-Oxley Act in 2002. Hyperion Enterprise was designed and developed long before these additional requirements. Organizations have created many external controls to compensate for the lack of capability. These manual controls can be time consuming, and costly. An application that is designed with these requirements in mind will reduce the effort required to meet compliance. From data and metadata control, process transparency, and reporting capability, HFM eases the burden of exercising the financial controls required in today’s environment and lowers the cost of compliance. HFM also allows organizations to attest to reporting with confidence and ease.

Technology Platform Issues

Built on a 32-bit platform, Hyperion Enterprise’s older technology makes compatibility with both server and workstation operating systems difficult to maintain and improve and may cause the organization to labor to make it work with newer technology. This may cause delays and issues when approaching supporting technologies like Microsoft Office or remote access to environments. Built on the latest technology, HFM

integrates seamlessly with the latest operating system versions and allows a much smoother support schema. It's smaller workstation footprint makes it easier to use remotely and much easier to support across a wide topology of users and environments.

Interfaces with Other Systems

As systems have advanced, it is increasingly difficult for Enterprise to interface with other key financial systems. From accepting, processing and controlling source data to providing data to downstream applications such as budgeting or tax reporting, Enterprise is limited to basic ASCII file extract and transfer. As data sharing between applications is increasingly required to ensure data quality and accuracy, Enterprise has struggled to meet these needs. HFM has the ability to interact directly with source systems and downstream systems, and is built on a standard compliant database architecture, reducing the effort and complexity of processes that share data between applications and reporting platforms.

Why Migrating to Hyperion Financial Management Makes Sense

Hyperion Financial Management includes additional options and flexibility in application design, providing increased visibility into data that Enterprise cannot readily match. Fortunately, there are enough similarities between Enterprise and HFM to give a sense of familiarity to those involved in the migration and implementation process, and make the transition less daunting. Concepts in HFM that remain the same are:

- Entity hierarchies that need to be consolidated and accounts that need to be calculated.
- Statues of OK and Impacted.
- Intercompany is eliminated at the first common parent and currency is translated.
- A grid with a POV bar to view data.
- Accessibility via both standardized reporting and Microsoft Office tools.

This sense of familiarity can make the transition easier and less daunting.

There are also some major differences between the two products. Fortunately, though, these differences result in a more flexible, powerful and usable consolidation tool.

Dimensions

One of the key differences between Hyperion Enterprise and HFM is the dimensions. HFM has 8 system-defined dimensions and allows you to have virtually an unlimited number of custom dimensions that can be applied to the account dimension, compared to Enterprise's four. This increases the organization's ability to slice and dice results to achieve the reporting and analysis required. This means fewer external analysis processes and spreadsheets with greater productivity. While the basic dimensions are the same in both products, some are handled differently and combined with new dimensionality to provide greater capability with less clutter. The dimensions in HFM also have additional attributes that can be harnessed to create memberlists or dynamic rules that are updated by changes to the metadata instead of changes to the rules themselves.

Let's take a closer look at each of these dimensions, and how additional attributes are harnessed to make HFM a more flexible and powerful consolidation tool.

HFM Dimensions to Enterprise

HFM	Enterprise
Entity	Entity
Account	Account
Scenario	Category
Year	Category
Period	Period
View	View
ICP	IC SubAccounts
Custom 1 - x	SubAccounts
Value	

Entity Dimension – Both products have an entity dimension that will allow multiple hierarchies. In both products, the entity dimension drives where intercompany is eliminated and currency translation occurs. An Enterprise application typically uses a substructure for the currency translation and also to define sub entities to segregate data load from journal entry or manual input points. This increased the number of entities in the structure, required significant effort in creating and maintaining organizations to achieve reporting needs. HFM does not have substructures but utilizes dimensions to achieve the same goals more seamlessly. The currency translation and the journal entries are handled in the value dimension reducing the number of entities in the structure. In some applications alternate reporting hierarchies are defined further using a custom dimension for areas such as cost center or line of business reporting.

Account Dimension – Both products have an account dimension that allows for accounts with financial intelligence. Assets and Liabilities will be treated as balance sheet accounts with Liability accounts having an implied credit balance. The same is true for Income and Expense accounts with the Income accounts having an implied credit balance. There are also specific account types for statistical accounts. In Enterprise, the account dimension is not built as a hierarchy. There can be portions of it that are hierarchical using up to two levels of subaccounts. The accounts that represent totals and subtotals must be calculated using logic. HFM uses an account hierarchy to organize the accounts. The parent accounts are naturally aggregated as a result, without the need to develop any rules to define the calculation. Alternate account hierarchies can also be developed further reducing the need for additional accounts and complex logic formulas. In HFM, this gives the user transparency into the data more efficiently.

Scenario Dimension – The Category in Enterprise typically represents a type of data such as Actual, Budget, or Forecast. In HFM, the Scenario dimension represents the type of data.

Year Dimension – The Category in Enterprise also typically represents a year. In an Enterprise application, there is typically a category for current year actual, last year actual, etc. Each year, a rollover is performed to move the data from one category to the next. This can be a complicated and time-consuming process. In HFM, since there is a separate dimension for year, the need to perform the annual rollover of data is eliminated.

Period Dimension – The Category in Enterprise also contains the period dimension. HFM also contains this as a separate dimension that in most applications represents a month and also shows the quarter, half year reporting conventions.

View Dimension – The Category in Enterprise also contains the view dimension although Enterprise does not really refer to this as a dimension. In HFM the View dimension enables data to be viewed as a Monthly, QTD or YTD amount.

ICP Dimension – Both products have the ability to track the partner for intercompany accounts. In Enterprise, this is handled in the account dimension with the intercompany subaccount table. In HFM, this is handled in the ICP Dimension.

Custom Dimensions – Enterprise does not really have an equivalent to the custom dimensions that are available in HFM. The closest that Enterprise has to this functionality are the subaccounts and is limited to a two tier subaccount. With virtually unlimited custom dimensions, HFM provides greater segmentation and analysis of data. Custom dimensions are also organized into a hierarchy so again the totals are automatically calculated. These dimensions are directly related to the account dimension and are used to capture additional details. Some examples of the uses of the custom dimensions are product detail, customer detail, transaction type, and rollforward detail.

Since it's initial release, HFM has had four custom dimensions. Beginning with the 11.1.2.2 release, the number of custom dimensions available is practically unlimited based upon the database that is used.

Value Dimension – The Value Dimension is probably the least understood of the HFM dimensions and causes the most unease when migrating from Enterprise. It is directly related to the Entity dimension and contains two types of members:

1. Members that represent every currency in the application. This allows any entity to be translated into any currency, regardless of the currency of its parent without requiring additional Organizations or Entities. This is functionality that is not available in Enterprise.
2. Members that are used in the consolidation. These members exist between every entity and its direct parent and they contain the results of journals, intercompany eliminations, currency translations, and proportional ownership. This allows greater transparency into the data as it consolidates through the organization.

While the additional dimensions in HFM may seem overwhelming at first, they dramatically increase the flexibility and the power of the consolidation tool. The combination of accounts with the custom dimensions allow a much greater level of detail to be captured in a much more usable format than Enterprise is capable of with the combination of accounts and subaccounts.

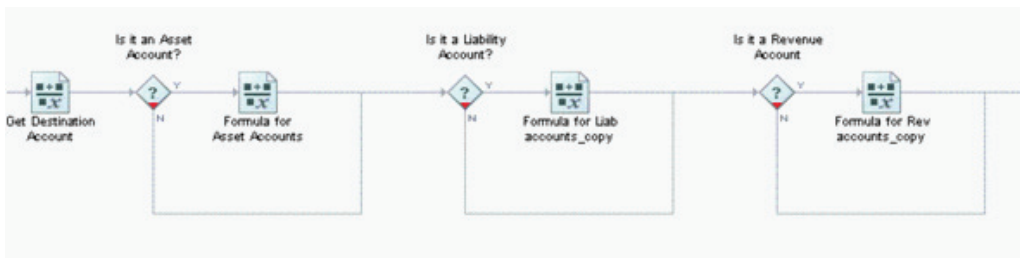
Calculations

The second major area of difference between Enterprise and HFM is how calculations are written. Competitors will often try to use the rules in HFM as a scare tactic and they are another source of uneasiness when migrating from Enterprise. The rules do look different than Enterprise Logic. And yes, in some ways they look more like computer code. The HFM rules can be complex, but then so can Enterprise logic. They both can be written in a text file or through a user interface. And remember that with the dimensions using hierarchies, the Total and Subtotals do not need to be built into the rules as was the case in Enterprise. In less complex applications, this dramatically reduces maintenance and change considerations.

If you take a rule in HFM and a Logic statement in Enterprise down to the basic level, they are the same. The left hand side of the equal sign is the destination account that will hold the result of the formula, the right hand side of the equal sign is the formula or source account(s).

Enterprise Logic	HFM Rules
#YTDProfit=#TotTBNetIncome	HS.EXP "A#YTDProfit.W#YTD = A#TotTBNetIncome.W#YTD"
#Balance=BALANCE(#TotAsset,#TotLiabEquity)	HS.EXP "A#Balance = A#TotAsset- A#TotLiabEquity"
#RetEarnBOY=OPE(#RetEarnEOY)	HS.EXP "A#RetEarnBOY = A#RetEarnEOY.S#Actual.P#12.Y#Prior"

As you can see, there is very little difference in the formula for an individual account. The application rules can be this simple. In addition to writing the rules in a script format, HFM also offers Calculation Manager, which is a visual tool to create the rules.



From this basic beginning, the rules can be enhanced to provide more control over how, when and where the calculations run. It is this ability to enhance the rules that makes the rules in HFM so much more powerful when compared to Enterprise Logic. It also makes it possible to design the rules so that they are driven by the metadata, which makes them easier to maintain. This allows you to write one formula that could potentially apply to 10, 20, or hundreds of accounts where in Enterprise you would have to write an individual logic statement for each of those accounts.

What does it mean to have the rules driven by the metadata? This concept is based upon using different elements of the metadata such as the label, account type or user defined field in the formula. For example, a rule could be written that would look at the value in each account's user-defined field and run only for those accounts that had a specific value. A rule could be written that would use the first 5 characters in the account label to define the destination account used in the rule. A rule could be written that would change the calculation based upon the account type. The possibilities are really endless.

Using an intelligent design when defining the metadata and their attributes will yield powerful efficiencies when writing the rules for the application. With an intelligent design, the rules will automatically handle additions to the metadata. A user can change the attributes of metadata members and the rules will then handle that member differently. An intelligent design cannot completely eliminate the need to make modifications to the rules, but it can significantly reduce the amount of modification required. This results in an application that is more flexible and easier and less expensive to maintain. So in reality, the HFM rules are not a weakness unless you let them become one. They are really a strength that can be leveraged to create a much better consolidation tool.

Audit Capabilities

Another substantial difference when comparing HFM to Enterprise is the audit capabilities. With the enactment of Sarbanes-Oxley and the increased audit scrutiny that has come with it, audit capability in consolidation applications are more important than ever. The audit functionality with Enterprise does not have any functionality that can really compare to the features that are in HFM.

There are really three components to the HFM audit functionality. The first is task audit. This gives visibility into a variety of activities that are performed in the application. Task Audit allows the audit data to be filtered by date range, server, user, or task. The tasks that are captured include consolidations, data loads, data entry, journal posting and unposting, loads of rules, metadata, and security.

Task Audit						
User	Activity	Time Started	Time Ended	Server	Description	Current Module
ksshand@Cooper_MSAD_GlobalNew	Logoff	9/30/2011 10:13:25 AM	9/30/2011 10:13:25 AM	FA0054		Manage Periods:
ksshand@Cooper_MSAD_GlobalNew	Consolidation	9/30/2011 10:12:11 AM	9/30/2011 10:12:16 AM	FA0054	The Scenario is Actual, the Year is 2011, the Start Period is 07, the End Period is 07, the Entity is CTR_Top,	Explore Data
ksshand@Cooper_MSAD_GlobalNew	Consolidation	9/30/2011 10:09:56 AM	9/30/2011 10:11:53 AM	FA0054	The Scenario is Actual, the Year is 2011, the Start Period is 06, the End Period is 06, the Entity is CTR_Top,	Explore Data
ksshand@Cooper_MSAD_GlobalNew	Journal Posting	9/30/2011 10:09:44 AM	9/30/2011 10:09:44 AM	FA0054		Journals
ksshand@Cooper_MSAD_GlobalNew	Journal Posting	9/30/2011 10:09:34 AM	9/30/2011 10:09:34 AM	FA0054		Journals
ksshand@Cooper_MSAD_GlobalNew	Logoff	9/30/2011 10:08:19 AM	9/30/2011 10:08:19 AM	FA0054		HyperionReports
ksshand@Cooper_MSAD_GlobalNew	Logoff	9/30/2011 10:08:13 AM	9/30/2011 10:08:13 AM	FA0054		HyperionReports
ksshand@Cooper_MSAD_GlobalNew	Logon	9/30/2011 9:59:00 AM	9/30/2011 9:59:00 AM	FA0054		Unknown Module
ksshand@Cooper_MSAD_GlobalNew	Data Retrieval	9/30/2011 9:59:00 AM	9/30/2011 9:59:00 AM	FA0054		HyperionReports
ksshand@Cooper_MSAD_GlobalNew	Logoff	9/30/2011 9:58:19 AM	9/30/2011 9:58:19 AM	FA0054		HyperionReports
ksshand@Cooper_MSAD_GlobalNew	Logoff	9/30/2011 9:58:13 AM	9/30/2011 9:58:13 AM	FA0054		HyperionReports
ksshand@Cooper_MSAD_GlobalNew	Consolidation	9/30/2011 9:55:19 AM	9/30/2011 9:58:11 AM	FA0054	The Scenario is Actual, the Year is 2011, the Start Period is 06, the End Period is 06, the Entity is CTR_Top,	Explore Data
ksshand@Cooper_MSAD_GlobalNew	Journal Unposting	9/30/2011 9:55:03 AM	9/30/2011 9:55:03 AM	FA0054		Journals
ksshand@Cooper_MSAD_GlobalNew	Journal Unposting	9/30/2011 9:54:45 AM	9/30/2011 9:54:46 AM	FA0054		Journals
ksshand@Cooper_MSAD_GlobalNew	Journal Unposting	9/30/2011 9:54:20 AM	9/30/2011 9:54:20 AM	FA0054		Journals

The second component is data audit. This functionality will show every change that is made to a data intersection, when the change was made, who made it and by what means (Data Entry, Journal Entry, etc.), date, and user. The audit data can be filtered on any intersection of the dimensions.

Data Audit						
User	Activity	Time Modified	Server	Point of View		Value
ksshand@Cooper_MSAD_GlobalNew	Journal Entry	9/30/2011 10:09:44 AM	FA0054	Actual, 2011, 06, Consol_Corp_Ext_Adj, USD Adj, CFPdExp, [ICP None], External_Adj, CF_Adjust, [None], [None]		4,489,000.00
ksshand@Cooper_MSAD_GlobalNew	Journal Entry	9/30/2011 10:09:34 AM	FA0054	Actual, 2011, 06, Consol_Corp_Ext_Adj, USD Adj, CFPdExp, [ICP None], External_Adj, CF_Adjust, [None], [None]		2,059,000.00
ksshand@Cooper_MSAD_GlobalNew	Journal Entry	9/30/2011 9:55:03 AM	FA0054	Actual, 2011, 06, Consol_Corp_Ext_Adj, USD Adj, CFPdExp, [ICP None], External_Adj, CF_Adjust, [None], [None]		0.00
ksshand@Cooper_MSAD_GlobalNew	Journal Entry	9/30/2011 9:54:46 AM	FA0054	Actual, 2011, 06, Consol_Corp_Ext_Adj, USD Adj, CFPdExp, [ICP None], External_Adj, CF_Adjust, [None], [None]		2,430,000.00

The third component is the design of the application. Often, one of the custom dimensions is used to track the source of data. There may be a member for data loads, one for eliminations, and one for journals. This allows visibility into the sources of a number at any level of the account or entity hierarchy. These transparencies reduce the effort and therefore cost of complying with internal and external audit requirements.

Deployment

Another area of difference between the two products is how it is deployed to users. As a client-server platform Enterprise can present challenges for users outside of the office where Enterprise resides, typically requiring additional capabilities such as Citrix to access the application. While Citrix does this very effectively, there is the cost of the Citrix servers and licenses to consider. More recent releases of Enterprise have been accessible via the web and some companies have used this in their deployments, but challenges exist even in these deployments.

HFM was designed to be delivered via the web. In fact, nearly all tasks a user or administrator performs are available from the web interface known as Workspace. From Workspace, users have access to both HFM and standard reports developed in Financial Reporting studio without locally installed elements to deploy and maintain.

Users of HFM can also perform many tasks from within Microsoft Excel seamlessly using Smart View (and what accountant does not love Excel?). This includes viewing data, using data forms to input data, accessing standard reports and executing calculations, consolidations and translations.

Migrating to Hyperion Financial Management

The decision to migrate from Enterprise to HFM is typically led by the finance organization, with input from IT, although either group could initiate the process. Finance and IT each have an interest in the consolidation application, although their focus is typically different:

The Finance organization is generally more concerned with the functionality of the application:

- Does it provide information needed to meet the reporting requirements?
- Does it allow for the completion of the close activities in the amount of time available?
- Will it adapt to changes in requirements?
- Is it easy to use?

The IT organization is typically more concerned with the product itself:

- Is it reliable and stable?
- What sort of vendor support is available?
- Does it meet our standards for network, operating systems, and third party products?
- What additional products, if any, are required, and do those products meet our standards?
- How is the product deployed to users?

There is some overlap between the two group's concerns. The shared goal is to create a set of rules that meet the reporting requirements, result in efficient consolidation times and require the minimum amount of maintenance going forward. In addition, both groups have an interest in security and controls. When one or both groups begin to have reservations regarding how well an application addresses these needs, it is time to begin exploring the options.

When it comes to actually implementing the migration, there are two approaches that can be taken, each with its own set of benefits and drawbacks. A company may decide to migrate the application as-is, with no modifications to the design, or they may design a new application within the new software. With either of these approaches, the migration will also include developing reports and redevelopment of the data migration process.

Determining which approach is best depends largely on the software being transitioned, and on the objectives of the upgrade. In the case of the Enterprise to HFM migration, if the objective is only to upgrade to a current product with ongoing Oracle support, then straight migration may be best as it can be done in less time for a lower cost. If the object is to upgrade and address improvement needs, issues and deficiencies with the current consolidation solution, then a redesign option is best. While a redesign requires more time and additional costs, the costs are significantly less than a straight migration now and a rebuild at a later date.

Migrating the Enterprise application as it stands is the quickest way to transition to HFM. With this first approach, the Enterprise dimensions, logic, and data are migrated to the corresponding HFM dimensions, rules, and data. The Enterprise Logic is converted to HFM rules, and the Enterprise data and journals are loaded into HFM. Any differences in the attributes and file formats between the two products are addressed during this type of migration. There are some benefits to this approach, such as the reduction in calculations required, but it does not take full advantage of the custom dimensions that are available or the opportunity to create a streamlined set of rules.

The second approach – designing a new application – takes full advantage of the features available in the new HFM software. The design process should include a review of the current application, how the company has changed since the original application was implemented, and an assessment of current internal and external reporting requirements. This is also an opportunity to “clean house” and eliminate any elements of the application or reporting that remain from legacy requirements and are no longer required. These building blocks will provide the foundation for a new HFM application.

Following the initial review, most often the new application design will include some components of the original application. For example, the entity structure may be similar to the Enterprise application since the legal ownership structure has not changed but the management reporting structure may be very different. The account and custom dimensions generally contain the greatest changes so that the application can take full advantage of HFM's functionality. The attributes for these dimensions, particularly the user-defined fields, would also be defined to allow for developing an optimal set of rules. Once the metadata is defined, the outline of the application's rules can be built.

The HFM rules can use the Enterprise Logic as a starting point. Some of the calculations will no longer be required since the HFM hierarchies will perform the subtotaling. Many of the calculations are already defined and can be updated to reference the new metadata and be written in the correct format for HFM. Other rules may be redesigned to take advantage of HFM functionality.

How Much Data to Migrate?

Many companies have preconceived notions of how much history they need to load into the new application, but this should be reevaluated. Considering the reporting that is produced each month, companies should look at both quarter-end and year-end figures as well as the 10Q, 10K and the annual report. Typically, the vast majority of the reporting is current year and prior year, which is the minimum required. An examination of the reporting will find some items outside of the current and prior year, but this is usually a small subset of the overall reporting. In these cases, companies should look into whether the reporting can be accomplished in another manner, and whether it is really worth the resources that will be required to load and validate this data.

Using Outside Resources

The migration from Enterprise to HFM is not a project that should be done without expert resources. With the numerous options, approaches, and decisions that come with a migration, it is essential to select the right partner to guide the company through the project to ensure its success. Companies that have plenty of expertise with Enterprise may not have the same depth of expertise with HFM. They may not have the experience of migrating applications between the products and the knowledge to avoid potential pitfalls, or have access to tools that can reduce the manual process of converting metadata and rules from Enterprise to HFM.

To ensure a seamless transition and reduce risk, look for a consultant who is familiar with both Enterprise and HFM—one who will partner with you to conduct detailed planning prior to the migration, ensuring all the technologies, processes, procedures, compatibility, and interfaces are accounted for. They should understand how both products work, as this knowledge is essential for a successful migration regardless of whether the project is a straight migration, a complete rebuild, or a combination.

How TopDown Consulting Can Help

With TopDown Consulting, you get consultants averaging 20 years combined Hyperion and industry experience. This unique viewpoint gives our consultants the dual perspective of colleague and trusted advisor—we understand your business because we have lived it ourselves. We build applications as if they will be our own.

Since the founding of the company, TopDown has uniquely focused on the efficient migration of Hyperion Enterprise applications. And to ensure a seamless transition and reduce risk, TopDown Consulting's experts partner with you to conduct a detailed planning session prior to the migration, ensuring all the technologies, processes, procedures, compatibility, interfaces, etc. are accounted for. Our team has experience with both Enterprise and HFM that dates back to the first releases of the products. We also have done hundreds of seamless and successful Enterprise to HFM migrations. We understand how both products work and this knowledge is essential for a successful migration regardless of whether the project is a straight migration, a complete rebuild, or a combination.

TopDown Consulting Migration Manager

To facilitate the migration from Enterprise to HFM, TopDown has developed our proprietary TopDown Migration Manager, which has helped scores of TopDown's Hyperion Enterprise clients to quickly and easily transition to HFM. TopDown Migration Manager makes converting to HFM faster, easier, and more cost-effective. Migration Manager enables you to convert your Hyperion Enterprise application(s) to HFM, Hyperion Planning, or Essbase and returning a baseline application in a day. This offers a huge development shortcut by cutting months from the project. And with the ability to see the data in new structures almost immediately, the TopDown team of expert consultants can design and build more value into your application based on the expanded capabilities and features available in HFM.

With TopDown Migration Manager, the Enterprise application can be migrated directly to HFM so that companies quickly see what the HFM application would look like using the straight migration approach. From this baseline, the TopDown team of experts can design and build more value into your application based on the expanded capabilities and features available in HFM. Prototype applications can quickly be developed to "what if" different design possibilities. This capability to rapidly see possible versions will give companies additional information to decide what approach to the migration will best meet their objectives and requirements.

About TopDown Consulting, Inc.

Founded in 2000, TopDown Consulting is the preferred Hyperion/EPM solution partner for many of the largest and best performing Global 2000 companies. TopDown's repeatable, scalable engagement methodology specifically considers an organization's unique business requirements and accommodates them through technology, process, and best practices gathered from years of working with leading companies across all industries. As an Oracle Platinum Partner, TopDown Consulting is a recognized leader in strategy, assessment, implementation, and optimization of Hyperion solutions. TopDown's exclusive focus on client self-sufficiency and commitment to client success is why hundreds of industry leaders consider TopDown Consulting to be a trusted advisor and indispensable partner for addressing all EPM challenges.

For more information, visit www.topdownconsulting.com.



TopDown Consulting, Inc. serves clients nationally and internationally from our San Francisco headquarters. For more information or to inquire about our services, please contact us.

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