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PLEASE FILL OUT YOUR EVALUATIONS

Back to Basics: EPMA's Return to Classic Planning

Shannon Burket – Director of Planning & Analysis

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ORACLE Gold Partner Cloud Standard

MindStream Analytics is a leading consulting and managed services provider with a proven track record for helping leading global companies address their enterprise challenges, focused on delivering sustainable profitability and competitive advantage.

Data is a new economic asset that is rapidly expanding and changing. You're challenged to figure out how to use it to your organization's advantage. We work collaboratively with our clients and bring innovative strategies that enable organizations to gain competitive edge and win with data.

MindStream has been recognized by *CIOReview* in November 2015 as a 100 "Most Promising Oracle Solutions Provider," ProformaTech for our innovation, and others for our innovative thinking and business analytic applications expertise. In 2015, MindStream was named by MSPmentor as a "Top 501 Managed Services Provider." We were recently named "Top 10 Fastest Growing Data Analytics Company 2016" by *The Silicon Review.*

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About the Presenter

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Agenda

- A Show of Hands
- The Future of Planning Debuted
- Back to Classic
- How to Replicate What We Love in Classic

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A Show of Hands

- How many of you are currently using EPMA?
- How many of you are considering migrating to Classic?
- If not, why?

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The Future of Planning Debuted

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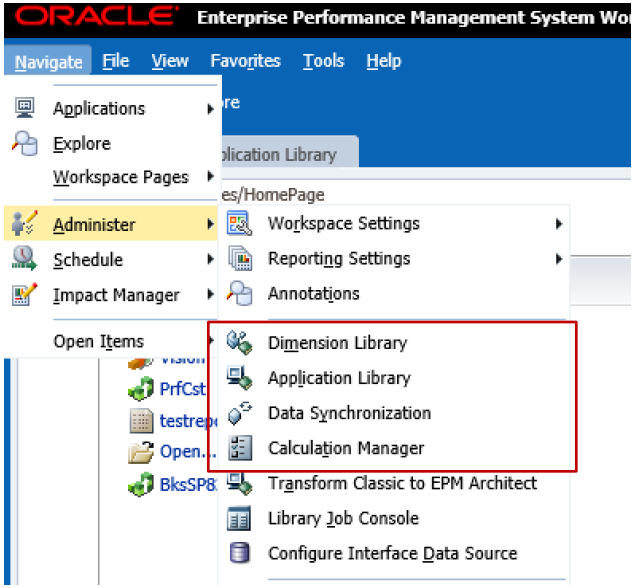
The Future of Planning Debuted

Enterprise Performance Management Architect (EPMA) is a component of Hyperion Foundations Services that unifies and aligns processes across the EPM system

Made its debut as part of the Release 9.3

EPMA integrates with HFM, Planning, Essbase, HPCM and DRM and includes several modules and utilities



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Modules and Utilities Simplify Application Management

DIMENSION LIBRARY

A centralized location to manage dimensions and dimension properties including: create dimension import profiles; add, delete and modify dimension members and associated properties

APPLICATION LIBRARY

A summary of applications created and/or deployed. It is the central location to create and manage EPMA applications including a view of data flows between applications, the migration of applications between servers and the deployment of applications

CALCULATION MANAGER

Create, validate and deploy business rules and business rule sets

DATA SYNCHRONIZATION

Enables data synchronization between and within Hyperion applications

BATCH CLIENT

Combine processes such as data export, metadata loads, data loads, and calculations and kickoff these operations using scheduling tools

FILE GENERATOR

Create import profiles

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Back to Classic

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Classic Planning is Back in Style

The writing is on the wall….EPMA is on its way out

- Non-revenue generating components
- Wasn't adopted as anticipated
- Oracle is investing in Classic (again)
- All cloud offerings utilize classic administration

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How to Replicate What We Love in Classic

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Most of What We Love About EPMA Can Be Replicated in Classic

- Metadata Management
  - Shared dimensions
  - Grid editor
  - User interface
  - Task flow
- Data Synchronization
- Duplicate Application

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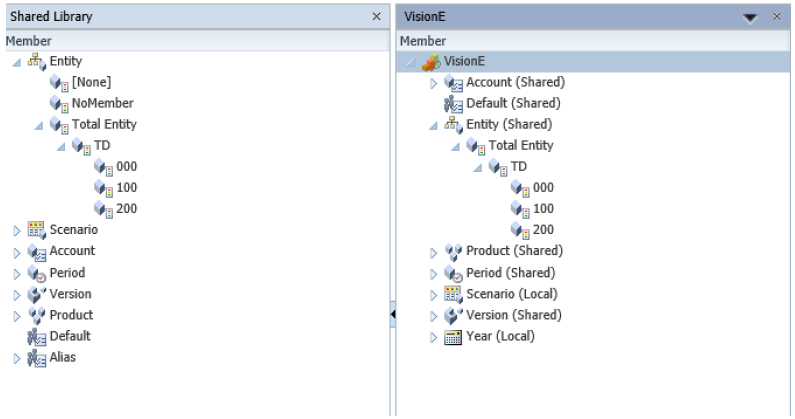
Manage Dimensions Across Applications in the Shared Library

- Shared Dimensions are available to all EPM applications
- Changes made to the dimension in the Shared Library are automatically inherited
- Application overrides can be made



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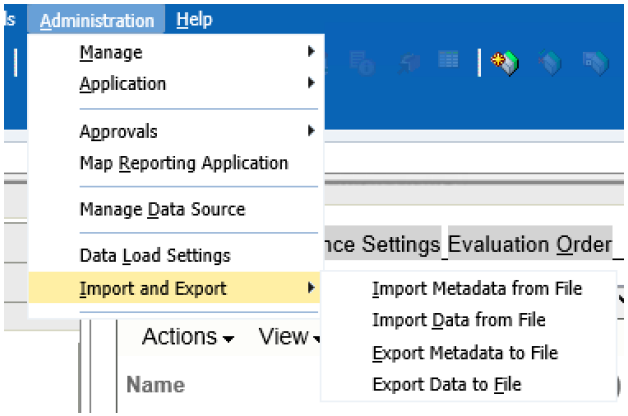
Shared Dimension Functionality Lacking in Classic

- Classic Planning administration is still lacking the ability to systematically manage metadata across applications

- However, with the addition of the Planning Admin extension and the Import / Export capabilities, it is possible (with some setup) to automate metadata updates across applications



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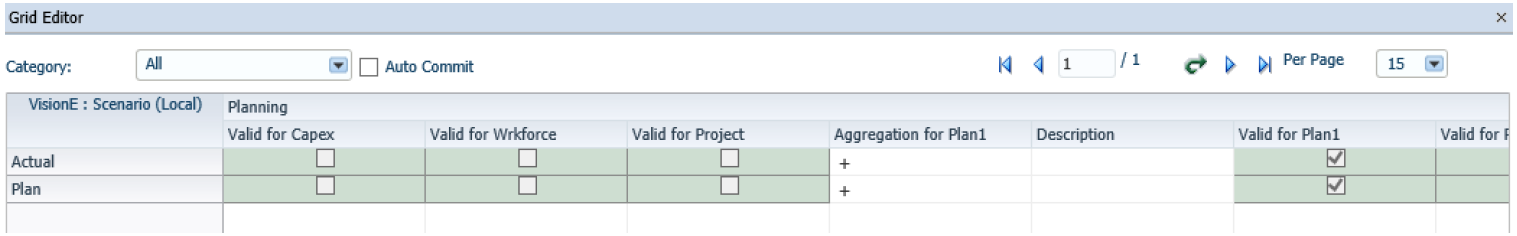
View & Update Multiple Members and Properties in Grid Editor

- View and maintain dimensions within a tabular, grid-based interface
  - View properties for multiple members simultaneously
  - Perform bulk updates to multiple members
  - Identify changed values and easily assign values



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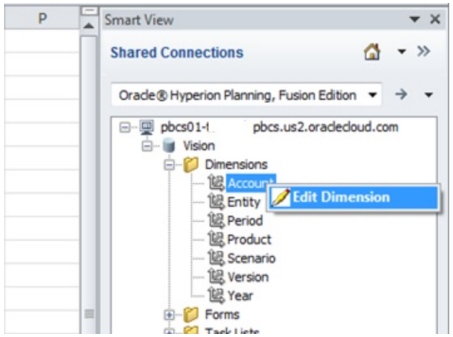
Smart View Planning Extension Mimics Grid Editor

- The Smart View Planning Extension (released in 11.1.2.3) enables you to update Planning metadata and deploy the application directly in Excel
- The extension must be installed before accessing the functionality



	Parent Member	Default Data Storage	Plan1 Data Storage	Plan2 Data Storage	Plan3 Data Storage	Data Type	Plan1 Consol op.
Account		Never Share	Never Share	Never Share	Never Share	Currency	Ignore
No Account	Account	Store	Store	Store	Store	Currency	not used for Plan Type
Statistics	Account	Never Share	Never Share	Never Share	Never Share	Non-Currency	Ignore
Revenue Driver Assumptions	Statistics	Never Share	Never Share	Never Share	Never Share	Non-Currency	Addition
Units	Revenue Driver Assumptions	Store	Store	Store	Store	Non-Currency	Ignore
ASP	Revenue Driver Assumptions	Store	Store	Store	Store	Currency	Ignore
COS Rate	Revenue Driver Assumptions	Store	Store	Store	Store	Currency	Ignore
Gross Margin %	Revenue Driver Assumptions	Store	Store	Store	Store	Percentage	Ignore
Expense Driver Assumptions	Statistics	Never Share	Never Share	Never Share	Never Share	Non-Currency	Addition
9000	Expense Driver Assumptions	Store	Store	Store	Store	Non-Currency	Ignore
9800	Expense Driver Assumptions	Store	Store	Store	Store	Currency	Ignore
Employee Benefits %	Expense Driver Assumptions	Store	Store	Store	Store	Percentage	Ignore
Square Feet	Expense Driver Assumptions	Store	Store	Store	Store	Non-Currency	Ignore
Trips	Expense Driver Assumptions	Store	Store	Store	Store	Non-Currency	Ignore
Sales Drivers	Expense Driver Assumptions	Label only	Label only	Label only	Label only	Non-Currency	Ignore

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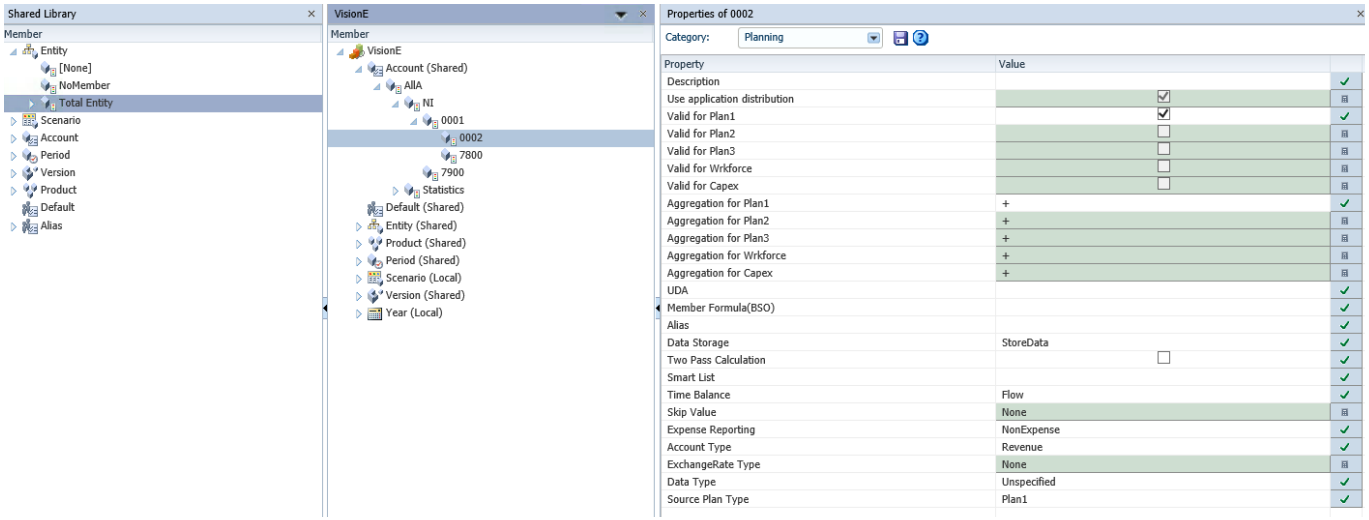
EPMA's Metadata Interface Rocks

- The metadata interface within EPMA is intuitive and easy to use



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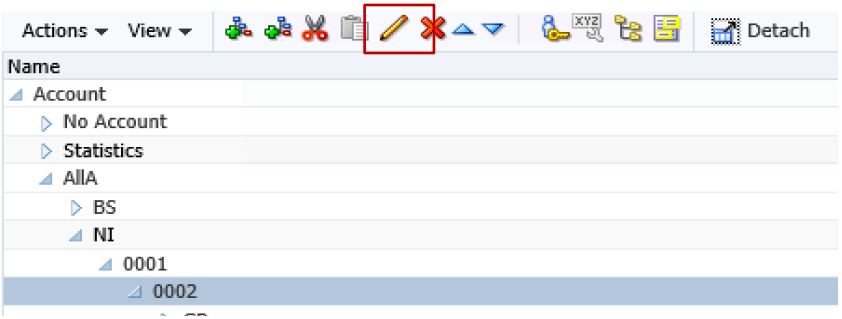
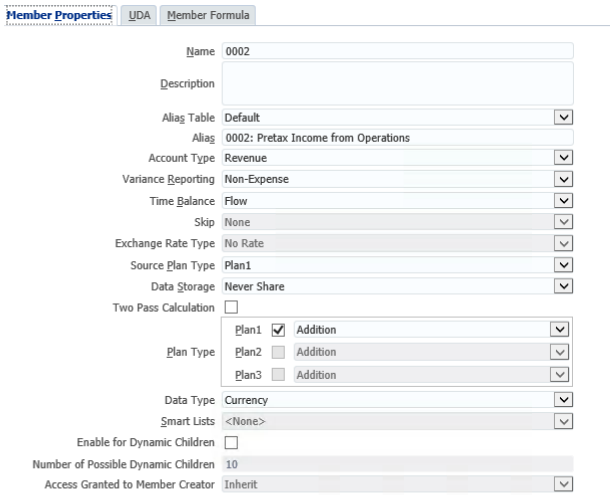
Classic Planning's Metadata Interface is STILL Behind

- Classic Planning's metadata interface continues to be awkward and all properties cannot be viewed on one screen
- There is no functionality missing but still…we want UI improvements!!!





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Task Flows Automate Application Processes

- Used to sequence EPMA operations such as dimension updates, application deployments and data synchronizations
- Can also be used to execute batch jobs and send emails
- Essential for automation of EPMA applications
- Task Flows can be scheduled by a built-in scheduler or executed interactively

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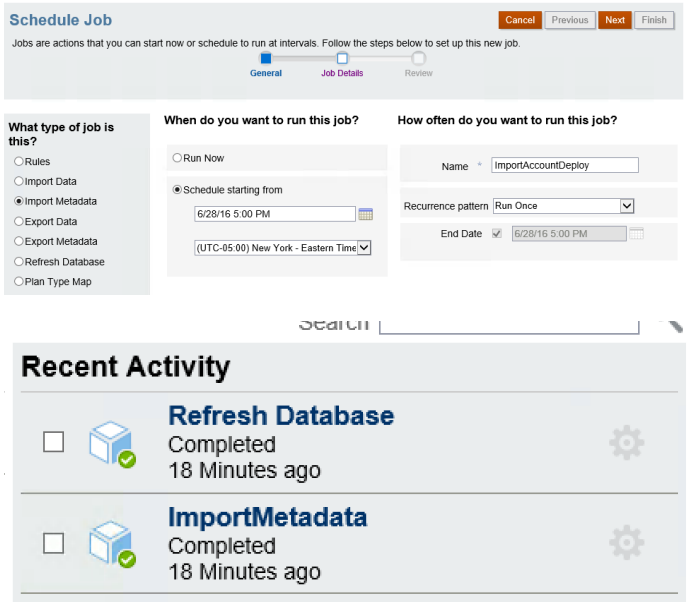
Planning Jobs Enables Task Automation

- Within the Simplified Interface in Planning, you can now create and schedule jobs for Planning administration tasks
- A single schedule job can import metadata and refresh the database
- Jobs include: Import / Export Data, Rules, Plan Type Map, Refresh Database and Import / Export Metadata
- Scheduled Jobs and be recurring, one-time or on demand
- Job Status is also available (with error files if applicable)



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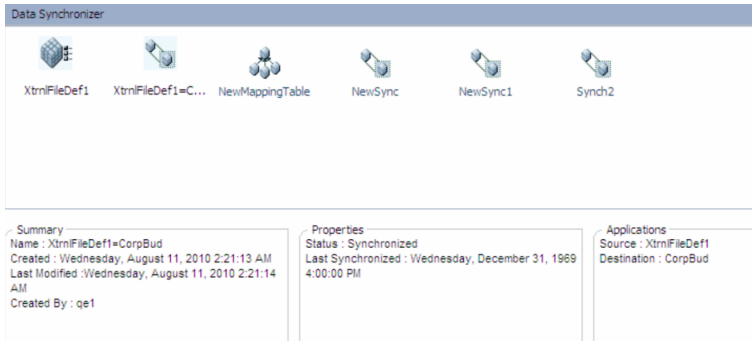
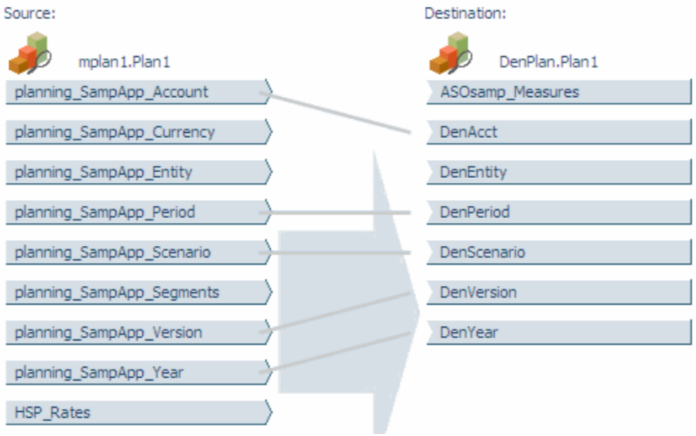
Data Synchronizer Moves Data Within EPM Applications

- Data synchronizer enables you to synchronize and map data between Hyperion applications, interface tables and external files
- Source to Target mappings are supported





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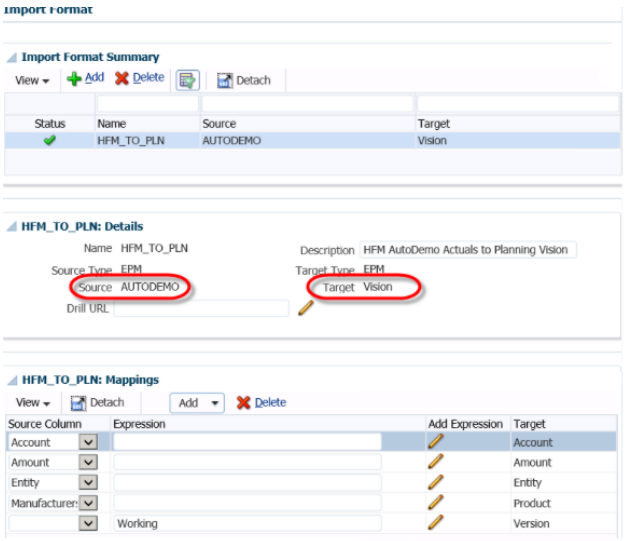
FDMEE Is the New and Improved Data Synchronization

- The EPMA Data Synchronization we know and love is available in FDMEE with Release 11.1.2.4
- Data movement between HFM, Planning, HPCM and Essbase (BSO/ASO) is supported
- This does require separate licensing 👎



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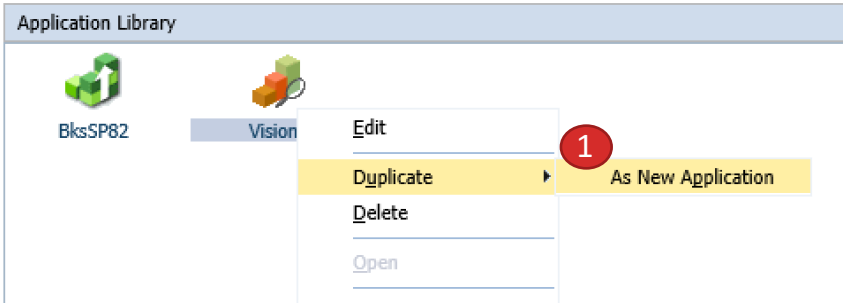
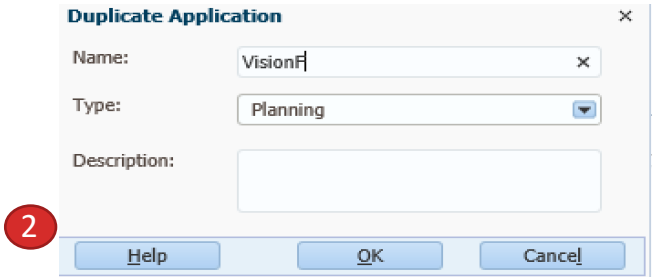
EPMA Duplicates Applications with Two Clicks

- EPMA applications can easily be duplicated for testing and/or what-if analysis
- Applications can be duplicated as new applications or as deployed applications





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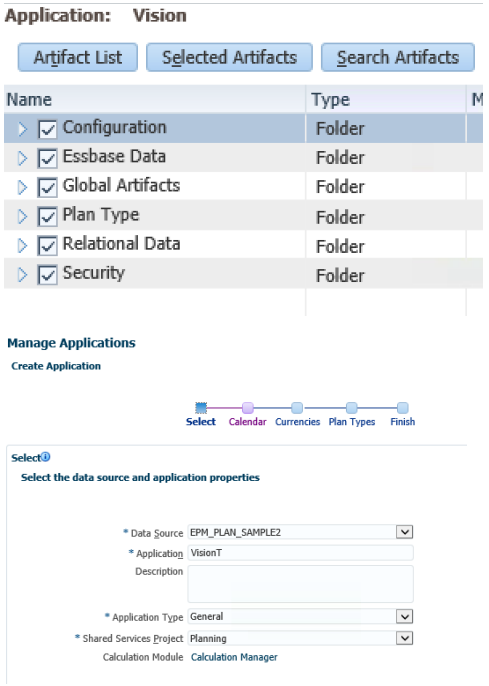
Classic Planning Application Duplication is NOT Two Clicks

- Duplicating a classic Planning application requires the manual creation of the application shell and the import of exported artifact from the source application via LCM
- LCM advances in recent releases leads to a smoother processes



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