AGENDA

US-Analytics

About Brian Marshall

- VP of Delivery
- 20+ years IT and EPM/BI Experience
- 17+ years with US-Analytics
- 200+ projects with US-Analytics
- Frequent Kscope presenter
- Frequent blogger at EPMMarshall.com

About US-Analytics

Dallas-based, Hyperion-focused for over 18 years with continuous business growth

- We are nimble and respond quickly to customers' needs
- Over **500** clients and over **1,000** successful Hyperion engagements
- Seasoned business and technical acumen with EPM and BI initiatives
- Over **65** professionals with **12+** years each of Hyperion experience and certifications
- Active leaders in the Oracle community
  - Founder of Hyperion Professional Women's Forum, advisory board leadership, conference presentations, webinars, EPM Speaker of the Year at Kaleidoscope in 2015 and 2014
- Corporate culture of integrity with 100% customer commitment
- Managed services
  - Managed services team is Dallas based, each with 10+ years of experience
  - Proven processes for all aspects of managed services

US-Analytics
PICTURE RESULTS.

Services

- Process & Advisory
- Infrastructure
- Implementations
- Upgrades & Migrations
- Managed Services
- Training

Solutions

- Planning & Forecasting
- Financial Close & Consolidation
- Business Intelligence
- Data Governance
- Big Data
- Data Integration

Accolades

2015 BEST PLACES TO WORK
DALLAS BUSINESS JOURNAL

Inc. 5000
AMERICA'S FASTEST-GROWING PRIVATE COMPANIES

2013, 2014, 2015

2015 Oracle TOLA
EPM Partner of the Year

ORACLE® Platinum Partner

- Original Oracle Hyperion and Pillar Partner
- Oracle Hyperion Financial Management 11
- Oracle Hyperion Planning 11
- Oracle Essbase 11
- Oracle Data Relationship Management 11

The Flavors of Planning

- EPM Standard
  - Only one type of application
  - 1 Custom BSO Plan Type
  - Modules (Workforce, Capex, Etc...)
- EPM Enterpise
  - Custom
    - 6 BSO Plan Types
    - 6 ASO Plan Types
    - Normal Planning functionality with no modules
  - Modules
    - 3 Custom BSO Plan Types
    - 3 Custom ASO Plan Types
    - 1 Reporting ASO Plan Type
    - Modules (Workforce, Capex, Etc...)
  - Free Form

What is Free Form Planning?

- Think of this as Essbase in the cloud with a hint of Planning
- More along the lines of what we hoped the original release of OAC would be
- User-based licensing, included with EPM Cloud Enterprise
- 1 Custom Plan Type
  - Either ASO or BSO
- ~~Future releases will support more Plan Types~~

Planning Functionality in Free Form

What do we get?

- Forms
  - Action Menus
  - Data Adjustments
  - Comments
  - Supporting Detail
  - Change History (and audit)
  - Attachments
  - Validations
- Dashboards
- Infolets
- Navigation Flows
- Rules
- Smart Lists
- Task Lists
- Valid Intersections

Planning Functionality in Free Form

What don't we get?

- Dimensions that control behavior of the system
  - Scenario
  - Version
  - Years
  - Period
- Workflow / Process Management
- Smart Push
  - We only have one Plan Type

Why do I need Free Form Planning?

- To create applications that don't fit into the dimensional structure required by Planning
- No Required Dimensions
    - Account...no
    - Scenario...no
    - Period...no
    - Year...no
- Perfect for migrating existing Essbase-only applications

How do I migrate to Free Form Planning?

The Basics

- The migration of the Essbase application itself is super simple (demo in a few)
- Free Form feels tailor-made to replace on-premise standalone Essbase applications
- Beyond the Outline
    - Data
    - Integrations
    - Security
    - Reports

How do I migrate to Free Form Planning?

Data and Integrations

- Data
  - Perform a native export
  - Either create a job or use Calc Manager to do the import
- Integrations
  - Load rules must be re-written
    - Cloud Data Management
    - Native Essbase files
  - Report scripts no longer exist
    - Cloud Data Management
    - Planning Exports (the one with the POV in a column)
    - REST API
  - MDX queries are no longer a thing
    - Cloud Data Management
    - Planning Exports
    - REST API

How do I migrate to Free Form Planning?

Security and Reports

- Security
  - Planning style security, not Essbase
  - Essbase supports "Matrix" security
    - Matrix security
      - User Bob can have access to Account 1 for Cost Centers 1 and 2 while only having access to Account 2 for Cost Centers 3 and 4.
- Reports
  - Smart View
    - Many Smart View retrieves will "just work"
    - Many Smart View retrieves "just won't"
  - Financial Reports
    - FR does exist for now, but if you are coming from an existing Essbase report, you will likely need to rebuild, or at the very least do extensive XML manipulation before trying to import the report
    - Management Reporting has an import function, but a rebuild is likely the better option here

How do I create a Free Form App from scratch?

- In short…you don't

- You must create a Free Form application from and OTL or LCM export

- Why?
  - Planning does not support choosing a dimension type
  - If you want your application to have dimensions like account, entity, or time…we can't do that in Planning…yet

- Ok…what if I really want to?
  - The only workaround we have for this so far is to create an outline with the core skeletal structure and dimension types specified
  - Import the outline
  - Finish out your build

How do I create a Free Form App from scratch?

- The upcoming April 2020 release of the Planning business process includes a new front-end interface to create applications...from scratch!
- More on this as it becomes available in roughly one week.

Demo

Q&A

Shameless Plug

- Visit my blog:
  - EPMMarshall.com
  - Formerly HyperionEPM.com
- Connect to #orclepm on twitter:

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