

8TH ANNUAL Oracle HUGmn Techday 2017

Wednesday, March 15, 2017

DAY AT A GLANCE

SESSIONS				
7:30a	Registration / Continental Breakfast / Networking / Visit Vendor tables			
8:30–9:30a	ASO - The Fourth Plan Type <i>David Grande, eCapital Advisors</i>	Oracle Hyperion/EPM Cloud Roadmap: Aim For The Cloud <i>Steve Cynor, Oracle</i>	On-Premise Migration To The Cloud, Plus The Latest Oracle PBCS Enhancements <i>Scott Costello, Key Performance Ideas</i>	Reduce consolidation process time by 50% with Evosys' FCCS solution <i>Arpan Makwana, Evosys</i>
9:40–10:40a	Data Relationship Management (DRM): A Key Cloud Enablement Solution <i>Todd Van Hoozier, Oracle</i>	Enterprise Planning and Budgeting Cloud Service: A new approach to cloud planning implementations <i>Randy Schmitz and Vatsal Gaonkar, Edgewater Ranzal</i>	I Didn't Know That Existed in Hyperion Financial Management (HFM) and Financial Data Quality Management Enterprise Edition (FDMEE) <i>Edward Roske, interRel, Oracle Ace Director</i> ♠	Dashboarding for Application Performance Management <i>Jonathan Berry, Accelatis</i>
10:50–11:50a	MISSION POSSIBLE: Migrating to PBCS <i>Bob Usset, eCapital Advisors</i>	Do You Still Need To Build A Data Warehouse Using Traditional Technologies? <i>Brad Reinders, Hackett</i>	HFM rule tips for speed freaks <i>Chris Barbieri, Finit, Oracle Ace ♠</i>	Profitability & Cost Management – Have it Your Way <i>Mike Killeen, Edgewater Ranzal, Oracle Ace ♠</i>
11:50a–12:50p	Lunch			
1:00–2:00p	State of Business Analytics: The Great Debate <i>Edward Roske, interRel, Oracle Ace Director</i> ♠	Why Your Budgeting Practice is Killing Your Bottom Line <i>Scott Costello, Key Performance Ideas</i>	The Bill for IT: IT Service Costing, Showback & Chargebacks with Profitability & Cost Management Cloud Service (PCMCS) <i>Mike Killeen, Edgewater Ranzal, Oracle Ace ♠</i>	ARCS and FCCS – A Customer Success Story <i>Doga Pamir, Perficient</i>
2:10–3:10p	Getting Started with Maps in OBIEE, BICS and Data Visualization Desktop <i>Wayne Van Sluys, interRel, Oracle Ace ♠</i>	Oracle Hyperion/EPM Cloud Roadmap: Aim For The Cloud <i>Steve Cynor, Oracle</i>	Band-Aiding Bleeding-Edge Deployments and Maintaining Compliance with Oracle's Third Party Software Support <i>Mark Wirth, Hackett</i>	Consistent Application Performance Management for Cloud, On Premise, and Hybrid Environments <i>Jonathan Berry, Accelatis</i>
3:15–4:15p	Cloud Strategy – What you need to know to succeed <i>Daryl Fink, Hackett</i>	Hacking Hyperion: A White Hat Approach to Securing Your Instance <i>Jon Harvey and Casey Ratliff, eCapital Advisors</i>	Hyperion Planning Interface: Simplified! <i>Cindy Eichner, Finit</i>	HFM to FCCS – A Customer Success Story <i>Doga Pamir, Perficient</i>
4:15–6:00p	Reception and Vendor Raffles			

SESSION DETAILS ~ 8:30 a.m. Sessions

Presentation/Presenter/Summary

ASO: The Fourth Plan Type

David Grande, Manager, eCapital Advisors

Both PBCS and the newest On Premise versions of Hyperion Planning now offer ASO Plan Types within the application. How can I use this to improve performance in my planning applications? Should I still be using the BSO cube? We will explore the opportunities enabled through this technology and cite a few examples of how companies are currently using this today. This will focus on overall strategy, new tools within the application that enable this to work better and considerations for implementing this technology.

Oracle Hyperion/EPM Cloud Roadmap: Aim For The Cloud

Steve Cynor, EPM Principal Sales Consultant, Oracle

Come take a journey with us and find out how the Oracle EPM and EPM Cloud are evolving to provide solutions for your business. In this seminar find out where Oracle EPM Cloud applications started and what the future holds.

On-Premise Migration To The Cloud, Plus The Latest Oracle PBCS Enhancements

Scott Costello, Key Performance Ideas

Learn why organizations are moving their on-premise Oracle planning applications to the Cloud. Scott Costello will share how organizations have leveraged Oracle's® Planning and Budgeting Cloud Service™ (PBCS) to:

- Develop Workforce Planning & Operating Expenses with connectivity back to HFM
- Replace antiquated Financial Reporting solution
- Improve Financial Consolidations and Reporting

Plus, as North America's leading implementer of PBCS, Scott will provide an update on Oracle's recent enhancements to PBCS, including:

- Updates to Mobile/Simplified interface
- New EPM Automate & Smart View features
- Sandboxes for end users
- Instant synchronization
- Predictive Planning
- Scheduling capabilities
- Valid data combinations
- Single sign-on ability

Reduce consolidation process time by 50% with Evosys' FCCS solution

Arpan Makwana, Evosys

The financial consolidation and close process is a burden that detracts an organization's personnel from better use of their time on analysis and decision-making. A company of any size can have absolute confidence in their financial consolidation, close and reporting processes with Evosys' FCCS solution. With single-click reporting and automation of subsidiary data consolidation, an organization can dramatically reduce the expended time for these tasks:

- Automate their consolidation process
- Get the single-click reporting packs
- Remove the pain of intercompany elimination and currency translation.

SESSION DETAILS ~ 9:40 a.m. Sessions

Presentation/Presenter/Summary

Data Relationship Management (DRM): A Key Cloud Enablement Solution

Todd Van Hoozier, Oracle

We are all aware that adopting a Cloud strategy has huge benefits and drives value in our organization. We also know that we won't get there overnight and that we sure could use some help in this journey. Come learn the important role that Data Relationship Management (DRM) plays in your Cloud strategy both as a key enabler during migration as well as for supporting ongoing change management and alignment across all of your Cloud and on-premises systems.

Enterprise Planning and Budgeting Cloud Service: A new approach to cloud planning implementations

Randy Schmitz, Cloud Practice Director and Vatsal Gaonkar, Certified Planning and Budgeting Cloud Service Implementation specialist, Edgewater Ranza

During the session, we will provide insights on how Enterprise Planning and Budgeting Cloud Service (EPBCS) is changing the EPM landscape in terms of leveraging out-of-the-box (OOTB) content. The session will show how EPBCS provides wizard based configuration along with incremental enablement of features to leverage OOTB content to quickly implement a Planning solution.

Key Emphasis will be given to:

- Defining the OOTB content that EPBCS provides
- Capabilities available with the Financials, Capital, Workforce and Projects Business Processes?
- How implementations are becoming more collaborative with EPBCS
- Understanding how to extend EPBCS to meet your Planning needs
- Demo the setup, configuration, and extension of an EPBCS application

I Didn't Know That Existed in Hyperion Financial Management (HFM) and Financial Data Quality Management Enterprise Edition (FDMEE)

Edward Roske, interRel, Oracle Ace Director 

Join us for an informative session that expands on the seldom used, more interesting, and useful capabilities in Hyperion Financial Management and FDMEE. Hyperion Financial Management has been around for over 15 years. In that time, the great folks at Oracle (and Hyperion before them) have added so many features that some of the more impressive ones are also the least known. From building dashboards in HFM to launching external URLs to drill through to underlying data to automated reconciliations of your inter-companies to currency triangulation...the list of fascinating features goes on and on. We'll then move over to Financial Data Quality Management (FDMEE), Oracle's one tool to rule them all in the world of EPM ETL (Extracting metadata/data, Transforming & Loading). FDMEE is not the old FDM (or even ERPI) that people remember and we'll be hitting some of the more interesting aspects of the product like "where is the Quality in FDMEE?" Don't miss this session to go deep under the covers on both of these remarkable tools!

Dashboarding for Application Performance Management

Jonathan Berry - CEO, Accelatis

Dashboarding for application performance management can be a powerful way to measure and report on the state of various aspects of a system and organization. Different roles for both Finance and IT administrators require different data, and care needs to be taken to ensure the dashboards don't get cluttered with data that isn't meaningful. This session will look at how to identify meaningful metrics for various roles in an organization and aspects of the target systems. We'll also look at how best to visualize current state and trends as well as ways to correlate between activities and results.

SESSION DETAILS ~ 10:50 a.m. Sessions

Presentation/Presenter/Summary

MISSION POSSIBLE: Migrating to PBCS

Bob Usset, Manager, eCapital Advisors

Thinking of moving your on-premises Planning app into the Cloud? Don't worry – you don't have to start from scratch with PBCS. Understanding the proper order and strategy for an on-prem to PBCS migration is key, and no one wants to learn the hard way. Instead, join eCapital Advisors as they walk you through everything you need to know regarding a PBCS migration strategy. In this session we will cover proper migration order as well as a few gotchas around security. After aligning your migration strategy with our helpful tips and tricks, you'll be on the cloud in no time!

Do you still need to build a data warehouse using traditional technologies?

Brad Reinders - Associate Principal and Strategy Lead for Analytics & Data Management Practice, Hackett

A well designed data warehouse is still the proven way to provide analytics on valuable data from the systems that you use to run your business. But data warehouses are expensive and take a long time to build and often fail to meet expectations. Anything that would help reduce the cost and time to provide analytics to the business would be quickly embraced. We will take a look at some new technologies and assess their abilities to play a role in this.

- Let's review – what are the reasons that data warehouses are built?
- Let's look forward – will new technologies help solve the challenges of building a data warehouse?
 - Can Data Lakes on Hadoop replace a data warehouse on a relational database?
 - Will Data Virtualization tools mean that you don't have to build ETL and move data?
 - Do Self Service BI tools allow the business to access the source data themselves?
 - Let's get real – what are the real reasons data warehouses so often fail to gain user adoption and how does that relate to these new technologies?

HFM rule tips for speed freaks

Chris Barbieri, Finit, Oracle Ace 

Let's break the speed limit and cut your consolidation time by 50-70%! Oracle ACE Chris Barbieri will show you how to identify inefficiencies in your HFM rules, and how you can easily rewrite them to get significant gains. Topics include:

- using data driven rather than metadata driven rules for validations and allocations
- avoid "rules that read from total" and calculate only what you minimally need to
- use HFM's ImpactStatus function for roll-forwards and to synchronize data across scenarios
- when to use Hs.Exp vs. Hs.SetDataWithPOV.

Chris assures you this is all legal!

Profitability & Cost Management – Have it Your Way

Mike Killeen, Sr. Vice President of Technology and Strategy, Edgewater Ranzal, Oracle Ace 

With Oracle's overall strategic direction focused on cloud-based offerings, it's no surprise to see additional EPM applications become available as SaaS offerings. Profitability & Cost Management Cloud Service (PCMCS) is the next generation EPM cloud offering that provides many of the on-premise Hyperion Profitability and Cost Management (HPCM) Management Ledger modelling features. Additionally, PCMCS has cloud-only capabilities such as mobile ready profitability dashboards, out-of-the-box profitability reports, and direct links to the Oracle Cloud marketplace for download of implementation accelerators that will reduce implementation times and maximize time to value. Key Emphasis will be given to:

- A review of the key use cases, ranging from operational transfer pricing, to management reporting, through customer and product profitability, that can be supported by PCMCS
- An overview of key features in PCMCS related to functional administration, model development, and information delivery
- Comparison of on-premise HPCM and PCMCS feature differentials
- A preview of some of the available accelerators in the Cloud Marketplace
- A brief demo of the application

SESSION DETAILS ~ 1:00 p.m. Sessions

Presentation/Presenter/Summary

State of Business Analytics: The Great Debate

Edward Roske, interRel, Oracle Ace Director 

interRel surveyed over 250 companies about topics throughout the areas of BI and EPM in its State of Business Analytics Survey 2017. The survey explores subjects including financial consolidation, planning & forecasting, data governance, and reporting & analysis. The results revealed fascinating trends in cloud migration, close times, budget cycles, forecasting functionality, and more. Attendees will learn how companies are doing at an aggregate level but also by industry, size, and company age. interRel will maintain the survey for the next 5 years to track the evolution of the business analytics landscape. Take the survey to include your confidential results: <http://epm.bi/survey>

Why Your Budgeting Practice is Killing Your Bottom Line

Scott Costello, Key Performance Ideas

Do you have your budget wrong? You just spent hundreds (or more!) of hours running the annual budget process. It was painful. But, if you aren't using the right budgeting models, the rest of the year could be worse. If you don't utilize the right budgeting practices, you will not be able to understand why expense levels are where they are and you probably won't feel comfortable making decisions based on interim cost information in the middle of the plan year. We discuss the four budgeting models – Predictive Planning, Rolling Forecast-Based Budgeting, Driver-Based Budgeting, and Zero-Based Budgeting – and outline which technique is best based on your particular business unit cost structure, product complexity, and market growth and volatility. Scott Costello, our speaker, showcases which budgeting practices work best across different businesses and functions, as well as how to improve your organization's intelligence regarding 'costs' to:

- Provide continuous visibility at the corporate center into current cost information
- Improve spending decisions that affect the future
- Understand cost relationship and make impartial mid-year resource allocation decisions

The Bill for IT: IT Service Costing, Showback & Chargebacks with Profitability & Cost Management Cloud Service (PCMCS)

Mike Killeen, Sr. Vice President of Technology and Strategy, Edgewater Ranzal, Oracle Ace 

Within most "New Economy" organizations, Information Technology costs are one of the biggest areas of back-office spend. The goal of the Chief Information Office (CIO) is to make sure Information Technology spend and services are aligned with business strategy, with the appropriate focus on Run vs. Build activities. IT Financial Management is one of the disciplines that supports the mission of IT by providing critical planning & costing capabilities that provides for superior technology business management – allowing for IT to better deliver and demonstrate value to their internal business partners. The recent release of Oracle Profitability & Cost Management Cloud Service (PCMCS) has created a platform to deliver performance management solutions to all areas of the enterprise. With this in mind, Edgewater Ranzal and Oracle partnered to design and deliver downloadable content to the Oracle Cloud Marketplace to support IT Service Costing & Chargebacks. This session will provide an overview of this new domain starter kit, including the data model and pre-built analytics, as well as walk through various costing methodologies available allowing an IT organization to pivot between Financial, Project, Resource, Service & Consumer views of their data. Included in this presentation will be a demo of the new application.

ARCS and FCCS – A Customer Success Story

Dogma Pamir, Perficient

Orthofix International, a global medical device company and a legacy Hyperion Financial Management customer, needed to improve its overall close process, providing better tools to employees, and minimize its infrastructure footprint. They partnered with Perficient to implement Oracle Hyperion Account Reconciliation Cloud Service (ARCS) and Financial Close Cloud Service (FCCS) to perform account reconciliations and manage the close process. Perficient will discuss the implementation including lessons learned, benefits realized, and how these new applications could also benefit your organization. Discussion will include:

- Challenges with the existing legacy process
- Oracle vs. competition
- Benefits from the cloud solutions implemented
- Decisions made during the implementation process

SESSION DETAILS ~ 2:10 p.m. Sessions

Presentation/Presenter/Summary

Getting Started with Maps in OBIEE, BICS and Data Visualization Desktop

Wayne Van Sluys, interRel, Oracle Ace

All data has some form of location associated with it. By incorporating a map view of the data we gain a sense of relationship & can see patterns in space that are not easily observed in any form of visualization. Many BI Developers wish to incorporate Map Views is where to start, where to find map boundary data and how to pull it together with data sourced in the subject area. Go behind the curtain on map integration & get a jump start into incorporating Map Views in your BI Dashboards, BI Mobile Applications & Visual Analyzer. This is a cross-over presentation that incorporates topics from the Spatial Summit and BIWA Summit. This session will show via demos the steps necessary for developers to set up OBIEE and MapViewer to work together and present Map Views in OBIEE Analysis and Dashboards. I will also show how to extend map layers into Mobile App Designer and Data Visualization Desktop and Visual Analyzer with BICS.

Oracle Hyperion/EPM Cloud Roadmap: Aim For The Cloud

Steve Cynor, EPM Principal Sales Consultant, Oracle

Come take a journey with us and find out how the Oracle EPM and EPM Cloud are evolving to provide solutions for your business. In this seminar find out where Oracle EPM Cloud applications started and what the future holds.

Band-Aiding Bleeding Edge Deployments and Maintaining Compliance with Oracle's Third Party Software Support

Mark Wirth, Principal, Infrastructure Practice Leader, The Hackett Group

Your IT is planning a major upgrade project to Office 365 but you're not sure if your version of Smart View will function properly afterwards. Or you're planning an upgrade to the latest version of Oracle EPM but your HUG friends are telling you that it will not support the antiquated IE browser version that you are currently forced to use to remain compliant with another vendor's software. Let's face it...Remaining compliant with Oracle's ever changing support matrix is a challenge. Where do you go for the facts and what best practice options are available to you? In this session we'll demystify this challenge and help you decide what versions of third party software are available to you and make the best sense to align your corporate standards with Oracle's support matrices. We will discuss options that we have successfully implemented at other clients to mitigate risk and also answer any questions you may have about future road maps so that you can plan ahead and be prepared.

Consistent Application Performance Management for Cloud, On Premise, and Hybrid Environments

Jonathan Berry, CEO, Accelatis

Come see a unique and powerful approach to managing different deployments (cloud, on-prem, and hybrid) for your Oracle Hyperion environments. See how you can help both IT and Finance Administrators become more efficient by leveraging relevant, actionable performance information. We'll discuss how you can understand and analyze your performance and remediate certain issues in real time with a full set of functionality, including performance testing, auditing, monitoring, and other application performance management capabilities. Consistent Application Performance Management for Cloud, On Premise, and Hybrid Environments. Come see a unique and powerful approach to managing different deployments (cloud, on-prem, and hybrid) for your Oracle Hyperion environments. See how you can help both IT and Finance Administrators become more efficient by leveraging relevant, actionable performance information. We'll discuss how you can understand and analyze your performance and remediate certain issues in real time with a full set of functionality, including performance testing, auditing, monitoring, and other application performance management capabilities.

Improving your decision making with Evosys' EPBCS solutions

Arpan Makwana, Evosys

Oracle Planning and Budgeting Cloud Service is a planning, budgeting, and forecasting solution used by organizations worldwide to solve enterprise-wide business planning issues. Evosys has helped many organizations reduce their budgeting timelines from 5-6 months to 2 months. The solutions have enabled organizations to accurately plan their financial and operational budgets based on the various cost and revenue drivers. A few of the industry specific solutions to be discussed are listed below.

Retail: Decide feasibility of opening new stores/outlets; Event and seasonality based sales and operational planning; Revenue and expense driver from Sales, Marketing and Operational plan
Healthcare: Visibility over workforce requirements (Strategic Workforce Planning); Profitability by doctor and patient; Expense and revenue budget driven by operational data (patient number, ALOS, etc.)

Hospitality: Improvise your decision making with accurate occupancy details; Effective planning of contractual employees; Driver-based revenue calculations for restaurant and other auxiliaries income

SESSION DETAILS ~ 3:15 p.m. Sessions

Presentation/Presenter/Summary

Cloud Strategy – What you need to know to succeed

Daryl Fink, Associate Principal and Cloud Strategy Lead, Hackett

What is your organization's cloud strategy? How do you plan to get there? These are the most common questions. The Hackett Group advises our diverse mix of clients which includes Fortune 500 to Mid-Size businesses. What is becoming abundantly clear is that world class organizations are leading solution selection with a "cloud first" strategy. Join us as we cover the following topics:

- Factors driving cloud adoption's momentum
- Cloud deployment strategies
- Extracting the efficiencies of cloud solutions

We look forward to collaborating on your journey to cloud!

Hacking Hyperion: A White Hat Approach to Securing Your Instance

Jon Harvey, EPM Practice Lead, Casey Ratliff, Systems Architecture Lead

Because of its nature as a Financial Analysis system, Hyperion tends to house a company's most sensitive information (and a lot of it!). In spite of this, security is rarely a focus of many Hyperion implementations. In most areas of the suite, Hyperion is pretty good at securing itself. However, in a few glaring instances, there are default settings that leave you exposed. But don't panic – an ounce of prevention is worth a pound of cure! Join eCapital Advisors' Jon Harvey and Casey Ratliff as they decrypt, disassemble and walk through some of the back doors of the Hyperion infrastructure and how to secure them in your environment. Come learn about these exploits before your auditors do!

Hyperion Planning Interface: Simplified!

Cindy Eichner, Director, Finit

Learn how to implement Hyperion Planning's Simplified Interface. Enhance and simplify the user experience with demonstrations of customization techniques and tips for guiding the user through the planning process. See examples of existing applications which were converted from the classic interface to the simplified interface. Leave this session knowing how to implement the intuitive mobile friendly Simplified Interface.

The Hyperion Planning Simplified Interface was introduced with version 11.1.2.3.500. First available with PBCS it is now available for on premise implementations. Why use it? Lots of reasons including:

- Workspace is no longer required
- Access Hyperion Planning with a tablet
- Guide the user through the planning process
- Customize the look and feel of the application

More importantly, the simplified interface utilizes the latest client-side scripting techniques and users will experience faster response times. No more "fetching data" messages. During this session we will demonstrate how to set up the simplified interface so that the user is guided through the planning process by using dashboards and planbooks. We will show several applications as originally designed in an older version accessed through Workspace and then show the same applications as converted to the simplified interface. The demonstration will let the audience see the benefit of the new technology but they will also learn how to set up the interface for the best user experience. Attendees will learn and see demonstrated tips and techniques for building a user friendly and intuitive simplified interface.

HFM to FCCS – A Customer Success Story

Doga Pamir, Perficient

Finally it is out and ready to play... Financial Consolidation and Close Cloud Service (FCCS) is one of the latest cloud solutions offered by Oracle. It is offering several best practices with an out of the box approach to address some of the most required business needs. CPI Card Group adds FCCS to its Oracle cloud products family (PBCS, BICS, etc.) and completes the transformation from on-prem to cloud. In this session we will focus on the migration from HFM to FCCS and how CPI Card Group benefits from FCCS's best practice out of the box offerings such as pre-built cash flow, equity overrides, and more.

CPI Card Group decided to move its consolidations from Hyperion Financial Management (HFM) to Financial Consolidation and Close Cloud Service (FCCS). FCCS has a new approach with its built-in features, dimensionality, and back-end structure. There are similarities, differences, and great benefits that come with it. FCCS is sitting on Essbase and HFM's key "Value" dimension is split into other dimensions. In this session we will take a closer look at the highlights of FCCS, what we have learned while going from HFM to Cloud, and how to make the transition easier.