

Proven Practices in Migrating to System 11

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Agenda

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- eCapital Overview
- Why Upgrade?
- Business Case
- You've Decided to Upgrade...Now What?
- Sample Approach – Classic Planning
- Considerations and Exceptions
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eCapital Overview



- **Founded in 2001**
- **Enterprise performance management consulting firm**
- **Headquartered in Minneapolis, MN**
- **Regional offices in St. Louis and Milwaukee**
- **Over 150 performance management customers**
- **eCapital Advisors employees:**
 - Proven record and high customer satisfaction
 - Highly experienced project team
 - Deep Finance and Accounting backgrounds
 - Integrated EPM knowledge



Introductions

Casey J. Ratliff

- **System Architect & Principal**
 - **Over 15 years experience**
 - **Experienced with Hyperion installations, upgrades and architecture (4, 7, 9, 11)**
 - **Masters in Information Systems, BA in Information Systems**
 - **100's of installations & upgrades of EPM customers**
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Josh Stender

- **Sr. Hyperion Consultant**
- **Over 10 years experience**
- **Implementation experience with Planning, Financial Reporting and Essbase**
- **Previous experience managing Hyperion platform for large corporation**



eCapital Overview

- **Complete Range of Performance Management Services**
 - Strategic assessments and planning
 - Performance management consultants with extensive implementation experience with current platform and prior releases
 - Financial consultants with planning, financial reporting & consolidation delivery experience
 - Comprehensive classroom and custom training available
- **Regional project team for enhanced business partnership**
 - Local accountability
 - On-going strategic relationship
- **High value proposition – Strategic Implementation Methodology**
 - Value based approach to all engagements
 - Delivering top quality solutions to maximize return on investment



HNI Corporation



West Corporation



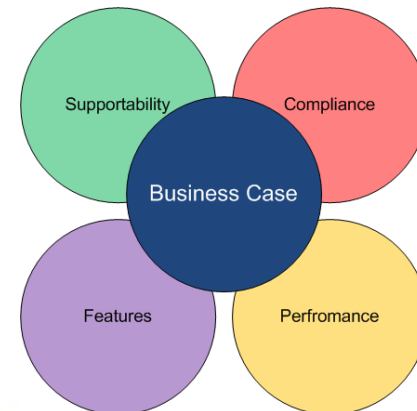
Why Upgrade?

- Integrated security leveraging your existing network authentication
- Shared metadata – share dimensions, members, data
- Supported environment
- Additional integration to other Oracle modules (OBIEE, ERP Integrator)
- Single Portal for all end user interaction
- Numerous enhancements to all modules



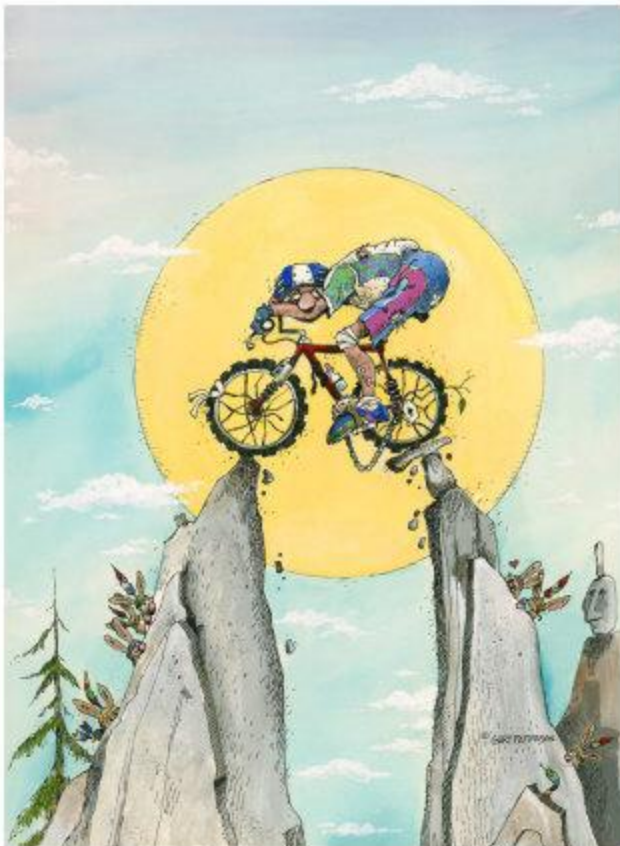
Common Business Case Elements

- Hardware platform at end-of-life
- New features will significantly aid business
- Integrated security and audit trail for governance/compliance (HIPPA, ITIL, SEC, SOX, PCI)
- Adding new modules to platform (EPMA, ODI, DRM, Essbase Studio)
- Outsourcing infrastructure or going to virtualization
- Need to be compliant for Support
- Need to increase performance





You've Decided to Upgrade...Now What?



- ✓ Define Upgrade Approach
- ✓ Measure/Baseline
- ✓ Take Inventory
- ✓ Improvements, Changes and Simplifying
- ✓ Identify Resources
- ✓ Infrastructure

Define Upgrade Approach

What are the drivers or constraints of the upgrade?

- Next budget or forecast cycle
- Year end
- Quarterly financial reports
- End of life of your hardware
- Aggressive new plans/changes to plans
- Availability of resources (GAP analysis)

Considerations

- Set the upgrade into Phases
- “Like” to “Like”
- Migrate, Rebuild or Both?
- ⚠ Make sure to get executive buy-in and a champion for the upgrade
- ⚠ Have a contingency plan

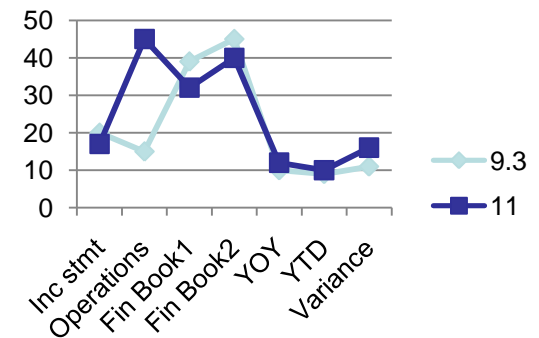


Measure - Baseline

Measure your environment's performance to baseline against the upgraded environment

- Calc Scripts run time
- Reports opening
- Plans refreshing data
- Multiple User login and navigation
- Consolidation performance – time to execute

By 'baselining', you will be able to quantify the benefits of your upgrade, diagnose performance issues, and manage expectations



Take Inventory

Take record of all objects in your environment

- Reports - Report Books
- Planning Forms
- HFM Grids
- Scripts, loads, variables and Business Rules
- Automation scripts and processes
- EIS models
- Roles, groups and Native users



Through the inventory process, you will be able to better calculate the time to upgrade, identify potential issues and re-create/migrate in the upgraded environment.

Improvements, Changes and Simplifying

Upgrading is a great time to “clean house” – that is, simplify what is being migrated or rebuilt.



Verify what you are using and only migrate/rebuild those items:

- Security
- Reports
- Forms
- Applications/Cubes

⚠ Also, during an upgrade, it is a good time to define known issues and/or changes you may want.

⚠ However, significant alterations should be held as a ‘Phase 2’ or later effort...

Staffing Resources

Identify the resources needed to upgrade and the resources internally you can bring to bear on the upgrade:

- Planning efforts
- HFM/FDM efforts
- Essbase efforts
- Reporting efforts
- Security efforts
- Automation

Perform GAP analysis and juxtapose with your plan to assure you have the right resources and the right amount



Infrastructure



Review your infrastructure:

- Will this be an in-place upgrade or a parallel upgrade?
 - What improvements can you take advantage of? 64-bit?
- Are you considering out-sourcing your infrastructure (example – Oracle On Demand)?
- Do you need to review and adjust your architecture?
- Do you anticipate increase in:
 - User volumes?
 - Data or reporting needs?
- Are you running separate environments, or considering running separate environments for Test, Dev and Prod?

Sample Approach – Classic Planning

Upgrade from 9.3.1 to 11.1.1.3 in a parallel environment

- ✓ Backup Essbase Application, perform 0 Level export
- ✓ Backup database for Planning Application
- ✓ Take inventory of security, dimensions, performance settings, forms and reports
- ✓ In 11, create new application with same Plan Types, same currency and set to Business Rules
- ✓ Stop Planning in 11, drop database object, re-create database object and import 9.3 database
- ✓ Apply SQL upgrade scripts
- ✓ Alter table to reflect version and Shared location/server
- ✓ Start Application and validate inventory
- ✓ Import 0 Level into Essbase
- ✓ Test

Considerations and Exceptions

- HAL not supported in 11, but it does work
- Shared Services is required for all except Essbase
- Life Cycle Management (LCM)
- Oracle recommends the upgrade path to follow:
 - 9.2.02 → 9.2.03 → 11.1.1.3
 - Note – this is not always the case however
- Security in Workspace will need to be re-created
- EPMA or Classic
- FDM may require re-write of validation rules (pre system 9)



