The Future of Oracle EPM: 11.2 or The Cloud?

Spotlighting the Options for Expiring On-Premises Premium Support

6/10/2020

Leading Today's Conversation

Nick Scott

DIRECTOR — EPM & DATA ANALYTICS

David Cuomo

SENIOR CONSULTANT

Who We Are

Founded in 1991, SC&H Group is a management consulting firm advising leading companies on accounting, tax, profitability and business process solutions that deliver exceptional business results. The professionals of SC&H Group assist and advise companies throughout every phase of their business lifecycle.

Expertise Beyond the Numbers

With over 280 employees, SC&H Group offers a broad range of services to clients of all sizes nationwide.

Our strong client relationships are evident through the multiple services and repeat engagements we perform for the majority of our clients.

SC&H is committed to being a leader through our techniques and tools and by recruiting/retaining the highest quality professionals. Our performance is evidenced by the following industry awards and acknowledgements.

Our Proudest Achievements

Oracle–Hyperion EPM & BI Consulting

ORACLE® Platinum Partner

SC&H's services span the life cycle of our clients' Enterprise Performance Management needs. They include:

Oracle-Hyperion EPM	Process Re-Engineering	Chart of Accounts Design	Strategic Planning and Roadmaps

Education and Training	Managed Services	Data Analytics and BI Reporting

Oracle Product Expertise

- **Oracle Cloud Services**
    - Planning & Budgeting Cloud Service (PBCS)
    - Enterprise Planning & Budgeting Cloud Service (EPBCS)
    - Financial Consolidation & Close Cloud Service (FCCS)
    - Account Reconciliation Cloud Service (ARCS)
    - Enterprise Data Management Cloud Service (EDMCS)
    - Narrative Reporting (EPRCS)

- **Hyperion Enterprise Planning Suite**
    - Hyperion Planning
    - Workforce Planning
    - Capital Asset Planning
    - Project Financial Planning

- **Hyperion Financial Close Suite**
    - Hyperion Financial Management (HFM)
    - Hyperion Tax Provision (HTP)
    - Hyperion Financial Close Management
    - Hyperion Account Reconciliation Management

- **Essbase**
- **FDMEE**
- **DRM**
- **EPMA**
- **Exalytics**
- **BI Foundation Suite**

Goal for Today – Help Make "The Decision"

The Decision

- In 2010, ESPN created a special, nationally televised interview for LeBron James to announce if he would stay with the Cleveland Cavaliers, or join a different organization in the NBA

- While ESPN may not create a special for all of you, you're likely facing the same sort of deliberation as LeBron about your Oracle-Hyperion migration path
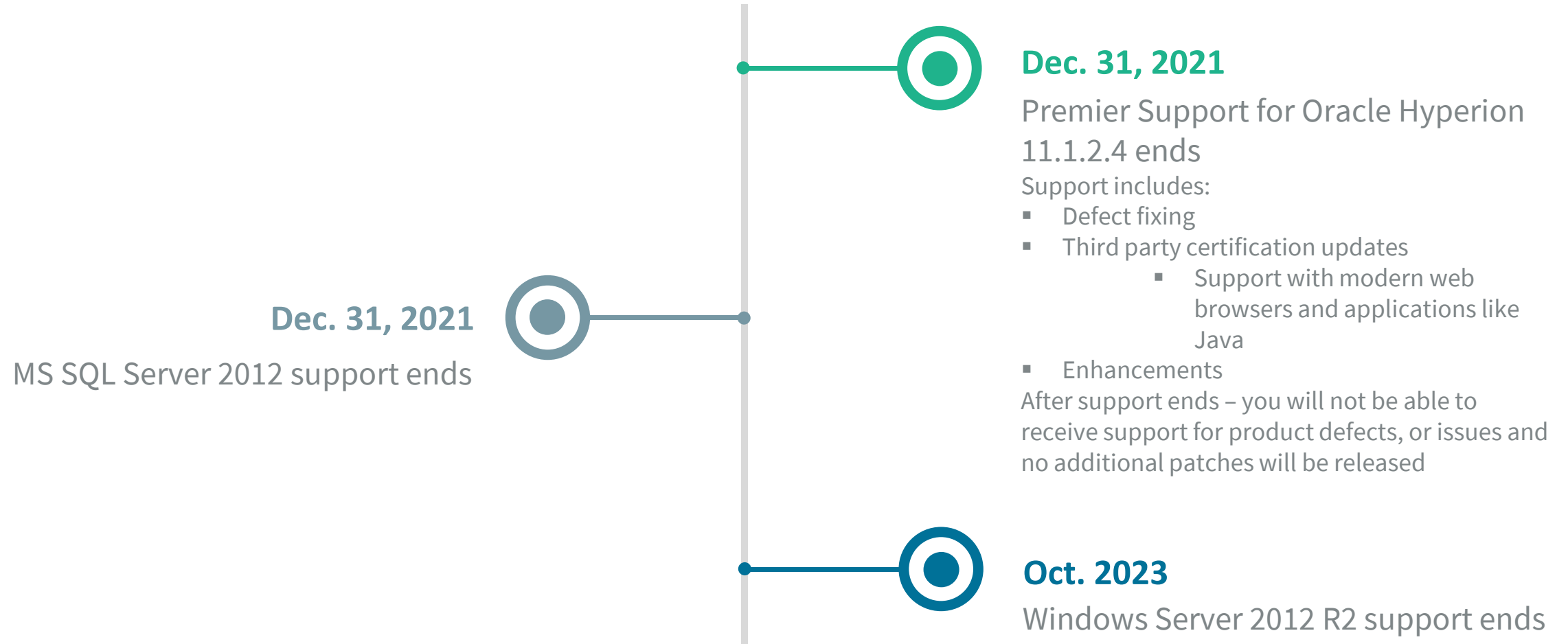
- Today we are here to help!

Oracle Hyperion 11.1.2.4 Support

When it is Ending and What Does it Mean?

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Oracle Hyperion 11.1.2.4 Support

Key Dates and Support Info

Dec. 31, 2021

Premier Support for Oracle Hyperion 11.1.2.4 ends

Support includes:
- Defect fixing
- Third party certification updates
    - Support with modern web browsers and applications like Java
- Enhancements

After support ends – you will not be able to receive support for product defects, or issues and no additional patches will be released

Dec. 31, 2021

MS SQL Server 2012 support ends

Oct. 2023

Windows Server 2012 R2 support ends

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With Support Ending, What Are the Options?

Key Release Information

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Now What?

Do Nothing / Support Expiration	Oracle Hyperion 11.2	Oracle Cloud EPM
	Remain On Premises	SAAS Solution
	Purchase New Hardware	Planning Migrations Mostly Lift and Shift
	Complete Typical Migration with Some Considerations	Consolidations Requires Some App/Process Design

11.2 Deep Dive

Key Release Information

11.2 Details and Specifications

Details

- 11.2 is replacing 11.1.2.4 as the newest version of Hyperion

- Designed to be a more lightweight version of Hyperion

- Added to Application Unlimited Support through (2030)

- Upgrades will be delivered through patches

  - No new versions required

- EPMA is no longer supported

  - A lightweight version of Data Relationship Manager (DRM) will be provided instead

Specifications

- Modeled on the 11.1.2.4 product series

- Uplift to FMW 12g release

- Essbase 11.1.2.4 will be used in 11.2

- Potential uplift to Essbase 19c

- RnA Framework replaced with simpler RDBMS repository

- Java uplift to 1.8

- Calc Manager no longer requires Flash

11.2 Details and Specifications

Supported Platforms

- Windows Server 2019 and Windows 10 is the only certified platform and operating system

- Linux is *not* currently supported, though there are plans to add support in later releases

Supported RDBMS

- Oracle 11.2.0.4+

- Oracle 12.1.0.1+

- Oracle 12.2.0.1+

- Microsoft SQL Server 2016 (SP2+)

11.2 Supported Migration Path

EPM

- EPM 11.1.2.4.xxx (including 11.1.2.4.700 and 11.1.2.4.900) is the only supported migration path

Additional

- Close Management
  - Patch Level - 11.1.2.4_253
- FDMEE
  - Patch Level - 11.1.2.4_220

11.2 New Features

Hyperion Financial Management

- Automated Consolidations
- Native Metadata Editor (replaces metadata management)
- Purging source tables after import
- Performance improvements
- SV, DB batch processing

Data Relationship Management

- Batch scripts to ease EPMA replacement
- Enhanced DRG Experience
- DRG Mass Approvals
- SFTP Connection

Hyperion Planning

- Smart Push
- Extended Attribute support
- Valid Intersections

EPM Infrastructure

- Additional 3rd party certifications
- Edge and Chrome support

DRM Replaces EPMA

RIP, EPMA.

- EPM Architect will NOT be available as a foundation component in EPM 11.2 and beyond

- Existing deployments of EPMA will be offered a restricted use license of DRM

- Alternatively customers can convert back to "Classic"

- A Migration Kit will be published to help facilitate the move from EPMA to DRM

DRM Restricted Use

- Restricted use means Hyperion on-prem apps only

- Max of 5 users to administer, secure and maintain hierarchies

- DRM "Full Use" is available for purchase

Removed Functionality

Hyperion Financial Management

- Financial Management Analytics

- Essbase Analytics Link for Hyperion Financial Management

- Quantitative Management Reporting for Solvency

Hyperion BI+

- Interactive Reporting (IR)

- Production Reporting (SQR)

- Web Analysis (WA)

Removed Functionality

Hyperion Planning

- Hyperion Strategic Finance

- Crystal Ball

- Simplified User Interface

- Workforce Planning

- Capital Expense Planning

- Project Financial Planning

- Offline Planning

Additional...

- EPM Architect (EPMA)

- Disclosure Management

- EPM Mobile

Infrastructure & Known Issues

Infrastructure

- Installation MUST be done on Windows Server 2019/Windows 10
  - Currently no other OS are supported
  - Planned future support for Linux, Solaris, Windows Server 2016

Migration

- Essbase FR Reports
  - Must be created from scratch in the new 11.2. environment, cannot be migrated

Oracle Cloud EPM

Key Details for Consideration

Why Oracle Cloud EPM?

Leader in Magic Quadrant for cloud financial planning and analysis solutions

Leader in Magic Quadrant for cloud financial close solutions

4400+ Customers, 80+ Countries, 20+ Industries

36,000+ active EPM members in the Oracle Cloud Customer Connect community which is used to share ideas, discuss topics of interest and gain insight into the Oracle EPM roadmap

Fully compliant with GSA's FedRAMP standards

Oracle Cloud EPM

Components

- Comprehensive platform that helps to align planning across the enterprise

- Enterprise version includes the following components:

    - Planning

    - Close/Consolidations

    - Account Reconciliations

    - Tax Reporting

    - Profitability and Cost Management

    - Narrative Reporting

    - Enterprise Data Management
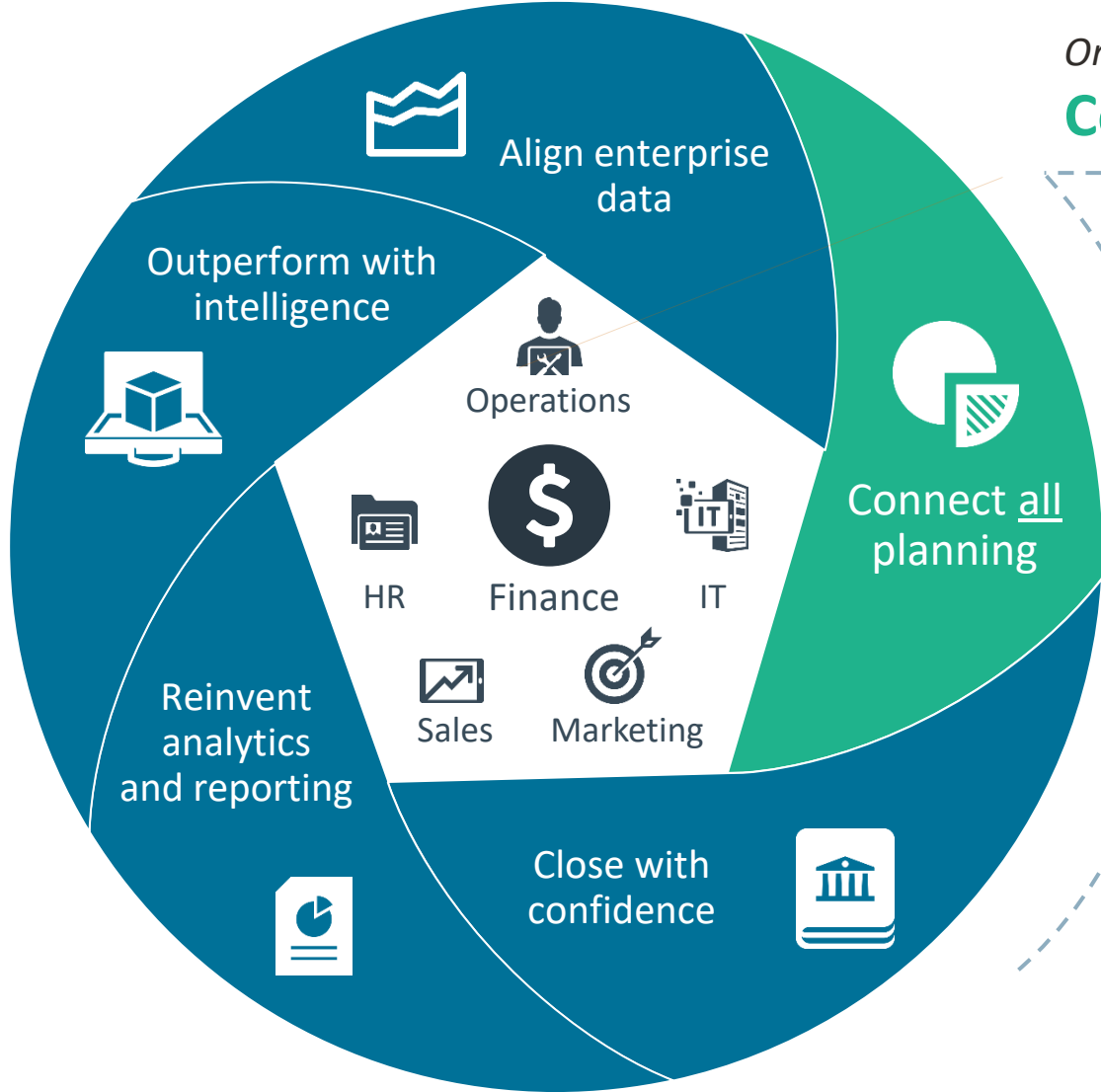
- Standard version is available for simpler deployments

Oracle Cloud EPM

Key Advantages of Cloud vs On Premises:

✓ True Software as a Service (SAAS) platform running entirely on Oracle's technology stack in a data center hosted by Oracle

- Data centers are located in various location across the globe

- 99.9% uptime guarantees from Oracle

✓ No VPN required

✓ Single-Sign On

✓ Secure solution - compliant with GSA's FedRAMP standards

✓ Applications receive patches and updates once per month automatically during and organization's define maintenance time

✓ No future upgrades or migrations

✓ All customers running on same platform/code release greatly enhances Oracle's ability to diagnose and troubleshoot application or bug fixes

✓ Automated application backups and simplified restore process
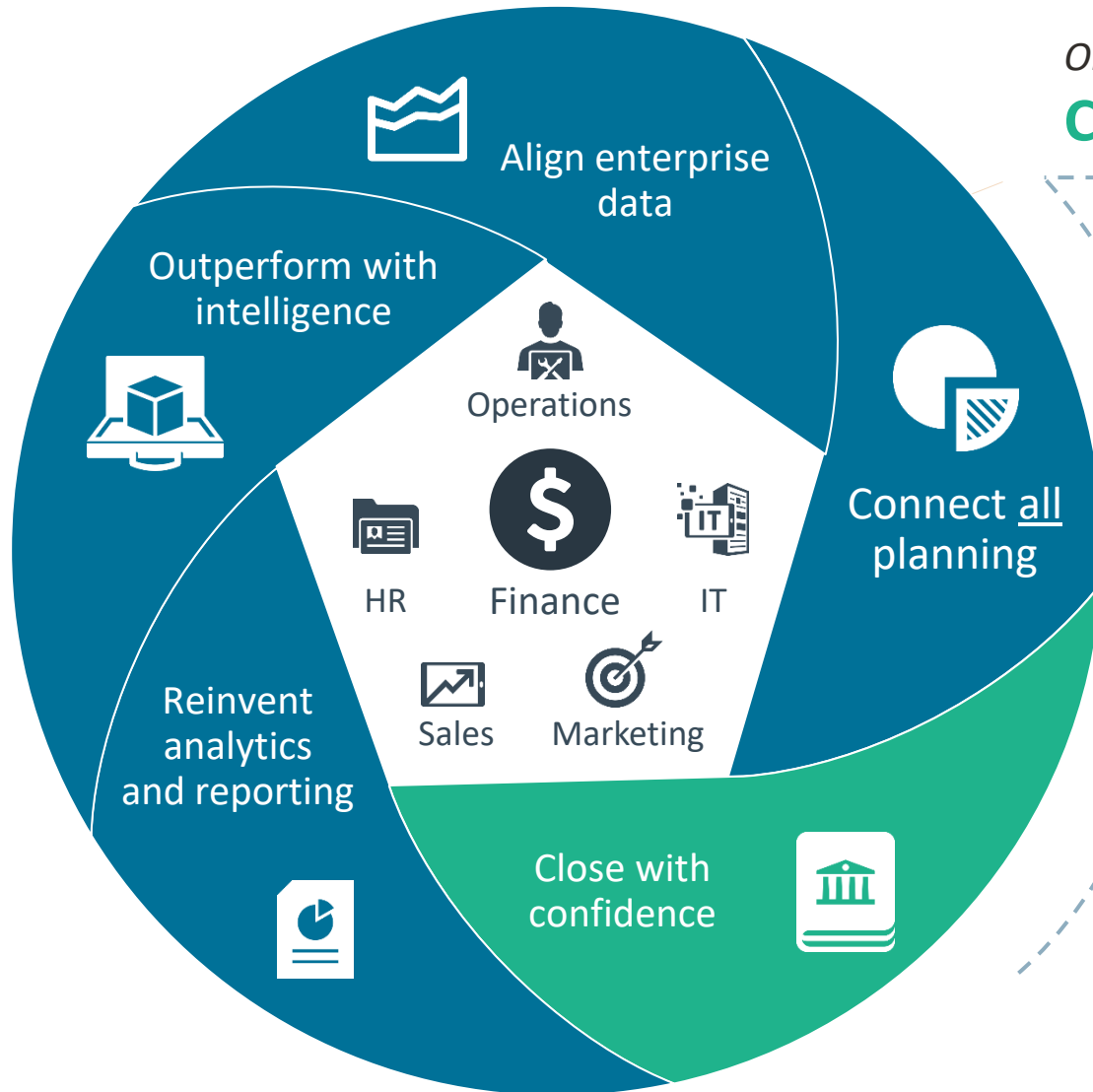
Oracle Cloud EPM: Completely Agile

Connected Planning

- Dynamic planning
- Strategic modeling and long-range planning
- Operational lob planning
- Zero based budgeting
- Driver based planning
- Management allocations
- Adaptive intelligent planning

Circle diagram segments:
- Align enterprise data
- Outperform with intelligence
- Reinvent analytics and reporting
- Close with confidence
- Connect all planning

Center pentagon: Operations, HR, Finance, IT, Sales, Marketing

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Oracle Cloud EPM: Completely Agile
Comprehensive Financial Close

Financial consolidation

Close process orchestration

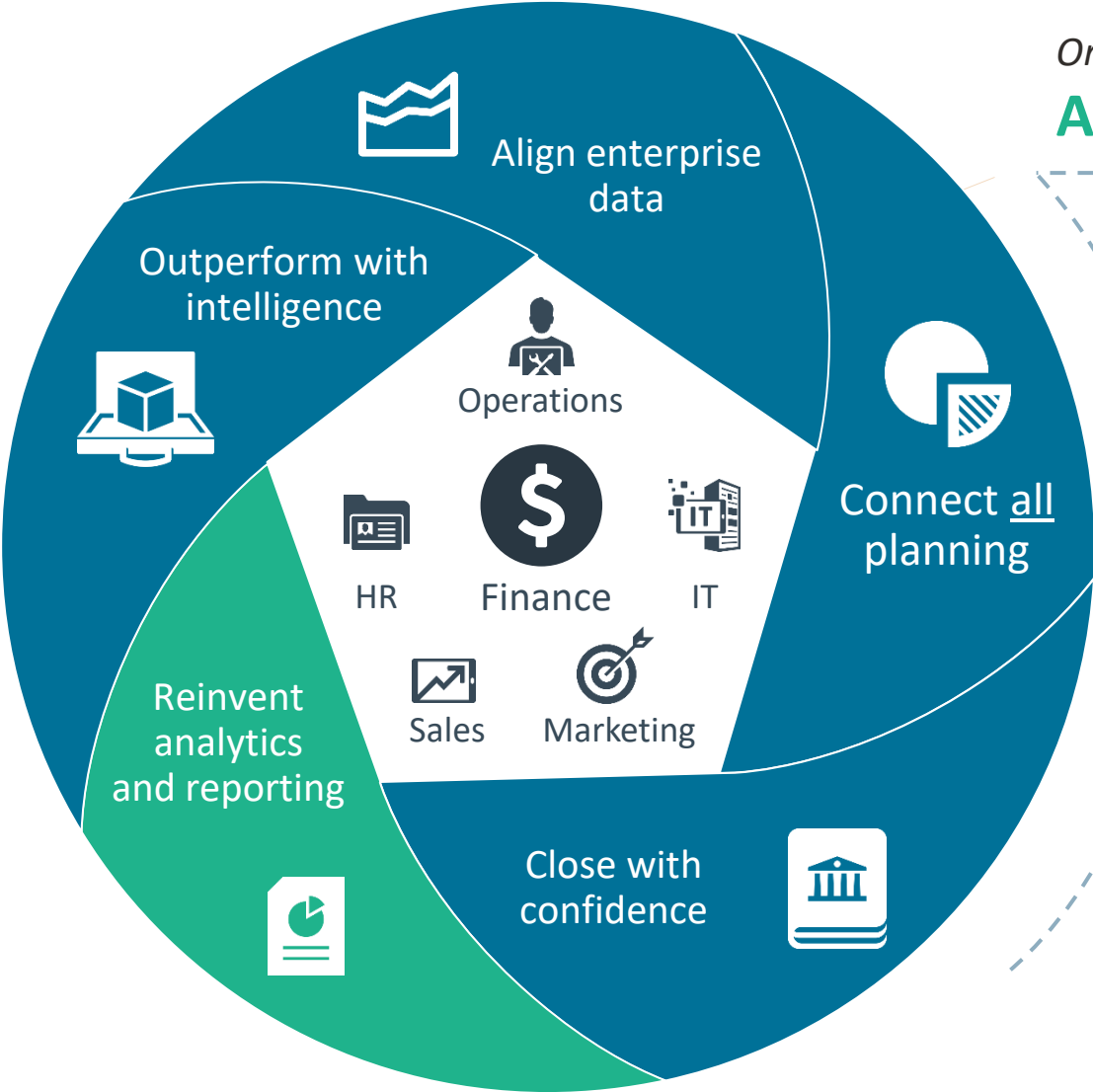Reconciliations and compliance

Tax provision and reporting

Transfer pricing

Intelligent process automation

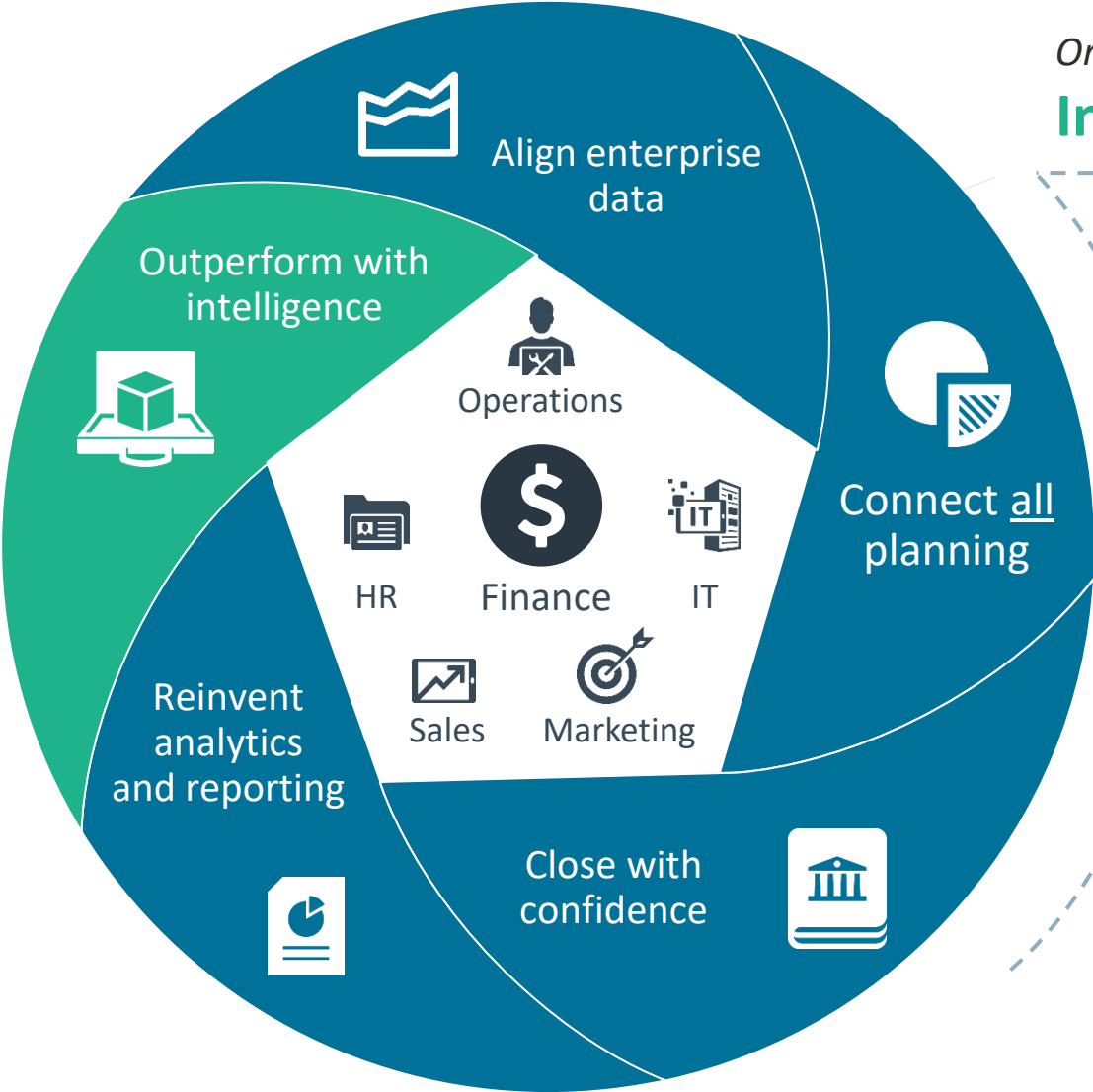Narrative reporting and disclosures

Oracle Cloud EPM: Completely Agile

Analytics and Reporting

High fidelity reporting

Collaborative narrative management

Interactive dashboards

Report books and management packages

Regulatory and XBRL filings

Report bursting and distribution

Oracle Cloud EPM: Completely Agile
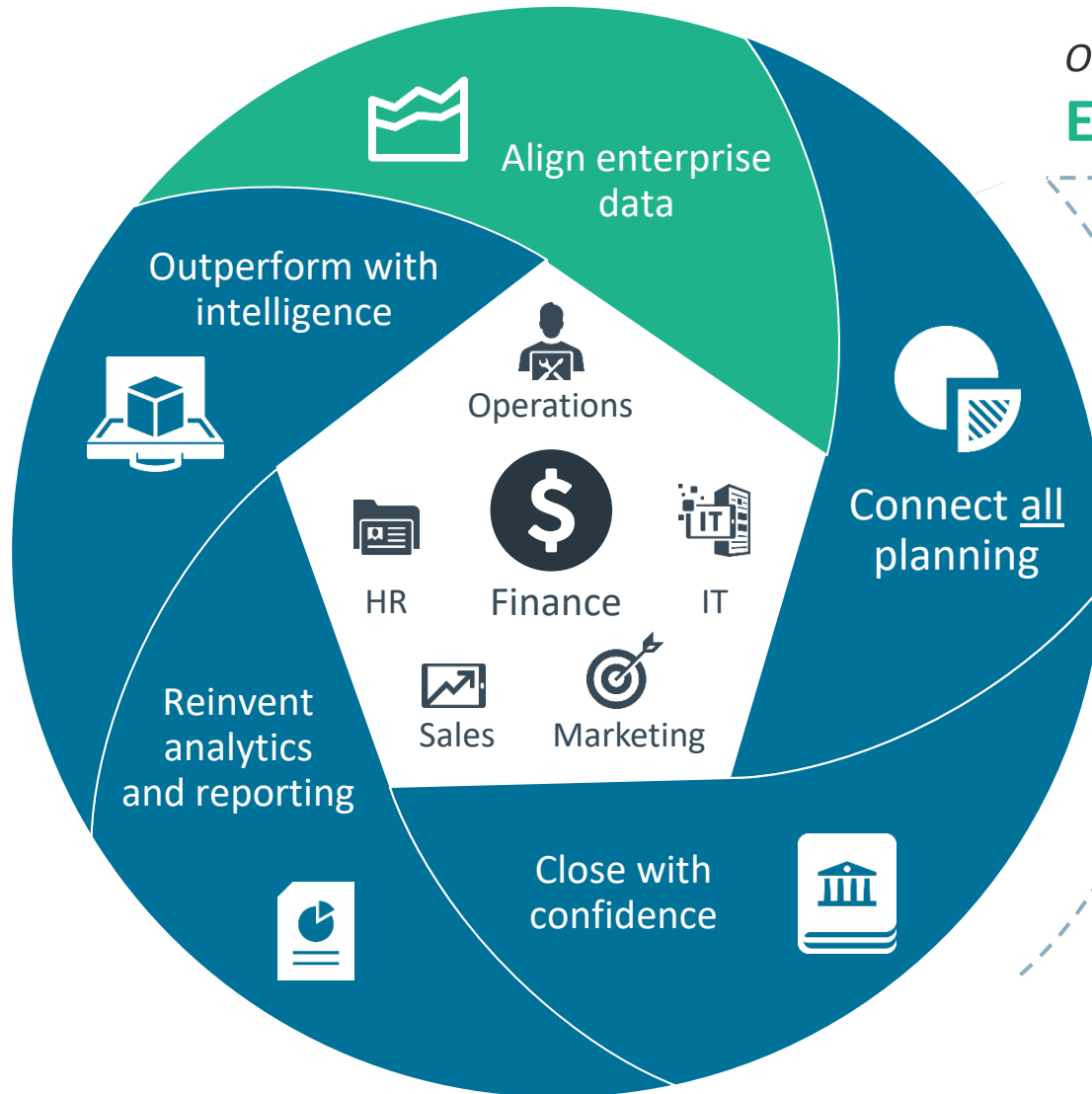# Intelligence and Automation

Machine learning

Pattern recognition

Predictive analytics

Natural language processing

Intelligent process automation

Automated operations

Oracle Cloud EPM: Completely Agile

Enterprise Data Management

Hierarchy management

Application-specific perspectives

Enterprise data governance

Application integration adapters

Change visualization

Support for migrations and hybrid deployments

Recommended Next Steps

SC&H Can Help Map Out the Journey

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SC&H Can Help Guide the Decision Process

Key Considerations

- Making the right decision for your organization can be difficult due to the number of factors that come into play:

    - Which option is more cost effective over the long term?

    - Does moving to 11.2 in the short-term buy time before moving to the cloud?

    - Is the consulting and ongoing support effort vastly different between the options?

    - Is your IT organization supportive of adding more server footprint to support 11.2?

        - Conversely, are they supportive of moving applications to cloud platforms?

    - Are there performance/functionality benefits that your specific organization will see by moving to the cloud?

- For our clients (and future clients), we can help answer all of the above on a case by case basis

SC&H Can Help Guide the Decision Process

Industry Trends

At a macro level, embracing cloud technologies and advanced analytics identified as the two critical pillars for organizational advancement -
Source: https://www.cgma.org/resources/reports/re-inventing-finance-for-a-digital-world.html

100% of our net new implementations have been Oracle Cloud EPM over last two years	Oracle Cloud EPM has been successful for our $16B clients as well our $400M clients	Rapid adoption to cloud for on-premises Hyperion Planning customers
Customers with longstanding, robust HFM applications do require more consulting effort to migrate to the cloud consolidation solution	SC&H has led several software selection projects as our clients often are interested Oracle Cloud EPM vs competing products	We have also seen an uptick in "strategic roadmap" projects to determine how to gain efficiencies when moving to the cloud vs a straight lift and shift approach

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SC&H Can Help Guide the Decision Process

Our Approach

- Conduct a migration assessment project for us to take a deep-dive on current Oracle Hyperion applications and related process/integrations

  - Typically requires two 90-minute meetings with Accounting, Finance, Finance Systems, IT, etc.

    - SC&H will conduct interview style meetings to understand the current landscape and usage of Oracle Hyperion applications

    - Identify if areas for improvement are needed/desired

  - Review current server architecture diagrams as well as available business process flows

  - Provide additional clarity around 11.2 vs Oracle Cloud EPM as it relates to client's specific case

  - We offer this assessment as a free service

- Provide recommended path based on client application configuration and application enhancements opportunities

- Provide migration level of effort estimates for recommended, or all possible options

- Provide assistance understanding licensing options and considerations presented from Oracle Representatives

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Summary

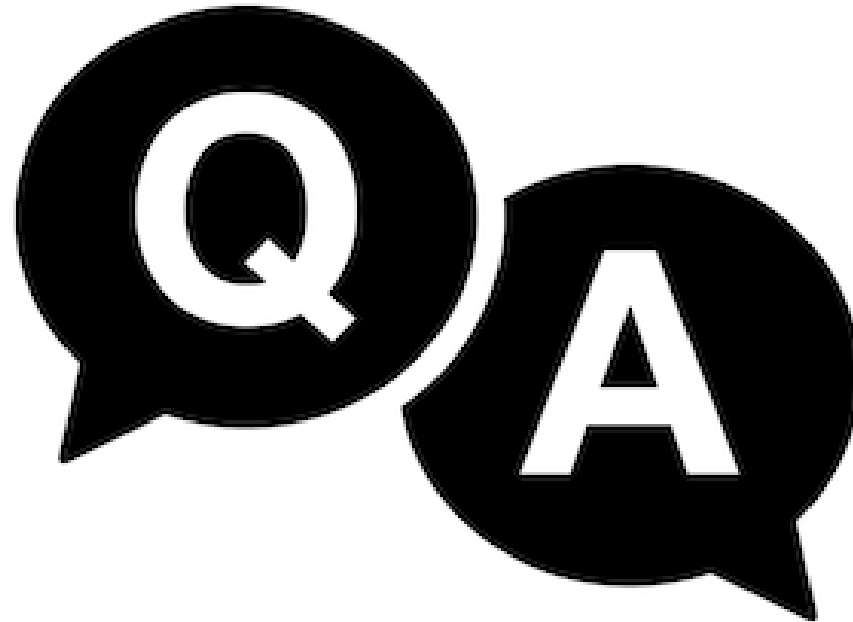Bringing It All Together

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The Decision

- Take the time now to plan out your migration path and get any unanswered questions answered

- Work with Oracle and Implementation Partners now to get ahead of the game

- Ensure Oracle-Hyperion EPM strategy is in alignment with overall organizational strategy

- Map out current business processes and Hyperion artifacts to create a clear transition plan to the EPM cloud or 11.2

- Consider close calendars, budgeting/forecasting events, etc. in your planning processes to minimize disruption to business users

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The Decision

- LeBron chose to take his talents to South Beach and won 2 NBA titles with the Miami Heat

- With the proper planning, hopefully you can feel as good as LeBron!

Answering Your Questions

Contact Information

Nick Scott

Director -- EPM and Data Analytics

SC&H Group

✉ nscott@schgroup.com

📱 410-371-8857

David Cuomo

Senior Consultant

✉ dcuomo@schgroup.com

📱 410-599-7515

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