

# Oracle Hyperion Planning

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**ENTERPRISE PERFORMANCE  
MANAGEMENT SYSTEM**

## KEY BUSINESS BENEFITS

- Reduce budgeting and planning cycles by weeks or months
- Improve forecast reliability
- Appeal to a wider user community through an intuitive Web user interface
- Provide familiar user interface for users with full Microsoft Office integration
- Reduce planning cycles with anywhere, anytime mobile
- Eliminate time lag between when plans are updated and reports are refreshed
- Reduce cost of ownership through superior application deployment, management tools and packaged data integration
- Lay the foundation for making the transition to Enterprise Business Planning

Oracle Hyperion Planning is an agile planning solution that supports enterprise wide planning, budgeting, and forecasting using desktop, mobile and Microsoft Office interfaces. It provides a robust modeling framework that helps develop reliable financial forecasts based on sales and operational assumptions to produce cost effective enterprise alignment. With Oracle Hyperion Planning, you have a solution that is best in class and proven in the market place to provide timely, actionable plans to help make informed business decisions. Oracle Hyperion Planning can be deployed on-site or in the Cloud.

## Streamline Enterprise-wide Planning and Budgeting Process

Enterprise alignment is challenging to achieve in financial plans due to disconnect between the office of finance and sales and operational business units. Financial planning and forecasting often ends up being a resource and time consuming process of gathering information spread across a multitude of disconnected spreadsheets or point solutions used by the office of finance and various sales and operational business units.

Oracle Hyperion Planning provides the required agility to the enterprise planning process by quickly aligning financial plans, models and forecasts across cost centers and lines of business thus enabling decisions to be made at a speed which business demands. The impact of changes to key plan drivers and assumptions can be evaluated instantaneously, and revisions made available immediately to all stakeholders without the reliability risks from manual interventions. Oracle Hyperion Planning has built in time intelligence and allocation logic and comes with a powerful calculation engine that can be used to express a range of business requirements, from simple arithmetic formulae to complex allocations. Oracle Hyperion Planning offers guided task flows and supports both bottom-up and top-down agile planning processes. Its robust workflow capabilities support efficient review and approval processes.

## Ensure Reliability with Predictive Planning and Rolling Forecasts

Companies today are faced with a rapidly changing business environment. Constantly changing market dynamics can bring in demand, supply and price fluctuations that require decisions based on alternate outcomes. A key need to make informed decisions in such a market is to be able to understand the financial impact of key business drivers and revise forecasts reliably and quickly.

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## KEY FEATURES

- Hybrid data model facilitates planning, analysis and commentary
- Flexible workflow capabilities
- Reliability with predictive planning capabilities
- Seamless Microsoft Office integration
- Collaboration and alignment with easy to use mobile friendly web interface
- Built in reporting and dashboards
- Proven and scalable architecture
- Robust integration with ERP sources with drill back
- Enterprise grade deployment and backups
- Agility with full mobile planning and workflow capabilities
- Instant calculations and fast aggregations

Oracle Hyperion Planning provides sophisticated predictive planning capabilities that can generate reliable statistical predictions based on time series data over long periods of history while capturing seasonality impacts along the way thus enabling forecasts to be more reliable. Oracle Hyperion Planning also provides on the fly what if modeling capabilities for planners to assess the impact of various combinations of business assumptions on key financial outcomes. To facilitate planners' ability to revise business and market impacts on forecasts quickly, Oracle Hyperion Planning comes out of the box with rolling forecast capabilities that makes the whole planning process even more agile from the get go.

## Collaborative Planning within an Intuitive Scalable Web Interface

Oracle Hyperion Planning enables business users to concurrently collaborate on their plans and report in an easy to use mobile friendly web interface with instant calculation and dynamic fast aggregation for large volumes of data making it perfectly suited for enterprise grade deployments. It is built with device form factor in mind with intuitive navigation enabling users manipulate and adjust plans drivers, or perform allocation and spread actions across multiple data intersections. For sophisticated users, Oracle Hyperion Planning supports advanced yet intuitive ad-hoc modeling capabilities to quickly zoom in to relevant data intersections using pivot and drill capabilities. It provides guided task flows for less-frequent users' intuitive guidance. This ensures that everyone can participate in the planning process.



Figure 1: The intuitive mobile friendly web interface of Oracle Hyperion Planning combines task flows, templates and ad-hoc models, dashboards and reports

## Enhance Productivity with Full Microsoft Office Suite Integration

Oracle Hyperion Planning leverages Oracle Hyperion Smart View for Office as the Microsoft Office interface allowing for planning actions within Outlook, Excel, Word and PowerPoint with built in prediction capabilities. Users can take all actions and engage in a collaborative planning process while working within the comfort of Microsoft Excel.

Modeling in Excel during the planning phase is facilitated with sophisticated ad hoc

capabilities where rows, columns and other axis can be pivoted on the fly to view the information from different points of view for quick analysis and forecasting. Common planning actions, such as spreading and allocation, are provided as context sensitive menus within input templates rendered within Microsoft Excel.

Creating customized input templates in Oracle Hyperion Planning is very simple. Users can create input grids and format them using familiar Excel font and number formats and on the click of a button generate input templates targeted at specific business units. Additionally, users can seamlessly move planning data across Excel, PowerPoint and Microsoft Word. This allows the creation of customized dynamic reports and presentations with accurate information and users can refresh the document to automatically consume the collaborative changes in the underlying database. The end result is intuitive usability, reduced manual intervention, improved reliability, and increased agility.

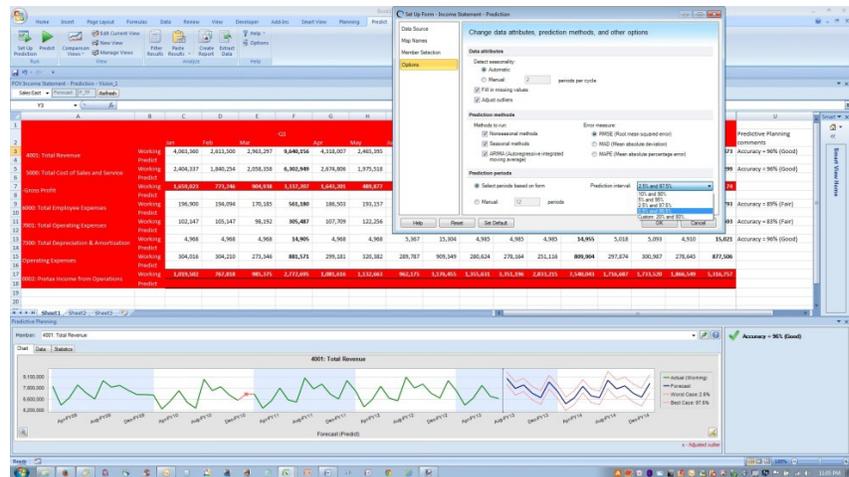


Figure 2: The built-in Microsoft Office integration in Oracle Hyperion Planning allows users to update, format and perform on the fly predictive modeling in Microsoft Office.

## Enable Agility with Mobile Access

Business users can perform common planning, budgeting and forecasting tasks with a fully functional browser based experience from their iOS, Android or Windows tablets. The commonly used features available via a tablet-optimized user experience include accessing task lists, viewing dashboards and reports, entering data and performing ad-hoc modeling. In addition workflow review and approvals processes can be executed on-the-go via the Oracle EPM Mobile App on iOS and Android phones. These mobile capabilities help improve user productivity and reduce planning cycle times.

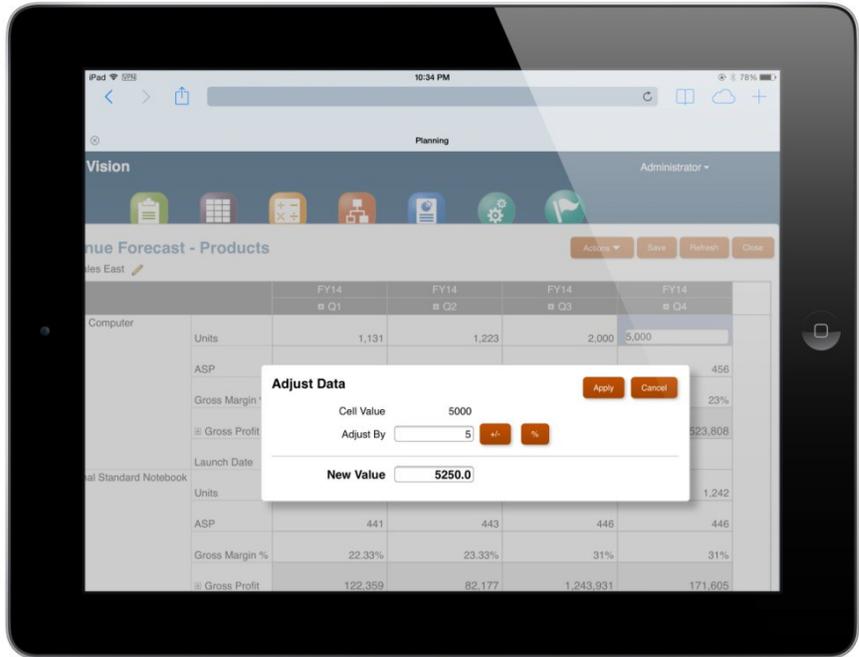


Figure 3: A fully mobile optimized browser experience for tablets and desktops facilitates planning when you need and where you want.

### Integrate Planning and Management Reporting Seamlessly

Reports and dashboards that display planning information can be created in minutes, and any changes made to the plans in Oracle Hyperion Planning are instantaneously reflected in the content of the reports and dashboards. Using the web interface, users can access user-friendly dashboards, interactive analytics, and richly formatted financial reports while interacting with the planning system. Users can create book reports for management reporting and these can be accessed on demand on a desktop or on mobile.



Figure 4: Fully formatted reporting capabilities facilitate enterprise wide distributed reporting and quick generation of management book reports.

Oracle Hyperion Planning's powerful workflow functionality, including e-mail notifications, alerts, and dashboards, empowers users to track and communicate the progress of plans and budgets. Ownership of plans can be designated based on a specified intersection of key plan dimensions. Approval paths can be altered based on data changes to provide true matrix approval. When a planner "promotes" a plan for approval, the system can automatically identify the next approver. All of the above processes can also be performed in conjunction with what-if analysis and scenario testing that allows users to compare and contrast multiple scenarios prior to promoting the selected scenario for approval up the management chain.



Figure 5: Flexible and powerful planning workflow capability allows sophisticated yet snappy review and approval processes with a new mobile application.

## Large Deployments with Scalable Architecture at Low Cost of Ownership

Oracle Hyperion Planning is built to scale with the organization's growth. It is based on hybrid architecture, which makes optimal use of relational and MOLAP technologies to facilitate a variety of planning needs including annotations and commentary which are essential for variance analysis. The scalable architecture enables organizations to start with an initially small deployment before extending it out to hundreds or thousands of concurrent users. The architecture allows for flexible data entry, analysis, and frequent real-time updates from anywhere, in a safe and secure environment.

Moreover, Oracle Hyperion Planning provides collaborative planning processes and dependable, centralized user and data management, significantly reducing maintenance and distribution costs. Oracle Hyperion Planning interoperates with accepted user management systems to help ensure maintenance and security consistency.

## Robust Data Integration and Deployments

Oracle Hyperion Planning facilitates bidirectional data integration with ERP systems, legacy applications, data warehouses, and other enterprise data sources. The solution

## ORACLE ENTERPRISE PERFORMANCE MANAGEMENT APPLICATIONS

Oracle enterprise performance management applications are an integrated, modular suite that supports a broad range of strategic and financial performance management processes and helps unlock business potential.

### RELATED PRODUCTS

Oracle enterprise performance management applications provide the following capabilities:

- Strategy Management
- Financial Close and Reporting
- Planning, Budgeting and Forecasting
- Profitability and Cost Management
- Enterprise Data Governance

is built to be flexible to the organization's needs. All system artifacts and data can be imported and exported or for backups using flat files or using out of box mapping features. Users can drill back from their planning data into the details in their source systems. Deployments can be easily categorized as development, test and production environments with easy movement of data models across these environments for quick and fast deployments.

## Lay the Foundation for Enterprise Business Planning

Oracle Hyperion Planning is the center piece of Oracle's broader solution for Enterprise Business Planning. The Enterprise Business Planning process spans strategic planning, budgeting and forecasting, workforce planning, capital asset planning, project financial planning and other elements of operational planning that have a significant impact on financial performance. It also involves an ongoing evaluation of business costs and profitability analysis and uses those insights to drive change in business plans. In addition, Enterprise Business Planning can leverage predictive analysis and simulation techniques to constantly evaluate and quantify risk and uncertainty, inherent to all of these plans, and takes actions to mitigate those risks as appropriate.



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#### Hardware and Software, Engineered to Work Together

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