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TECHNOLOGY AND APPLICATIONS FORUM
FOR THE ORACLE COMMUNITY

#C14LV

Integrating Hyperion Planning 11.1.2.2 Applications With Oracle Data Relationship Management (DRM)

Session ID#: 14059

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REMINDER

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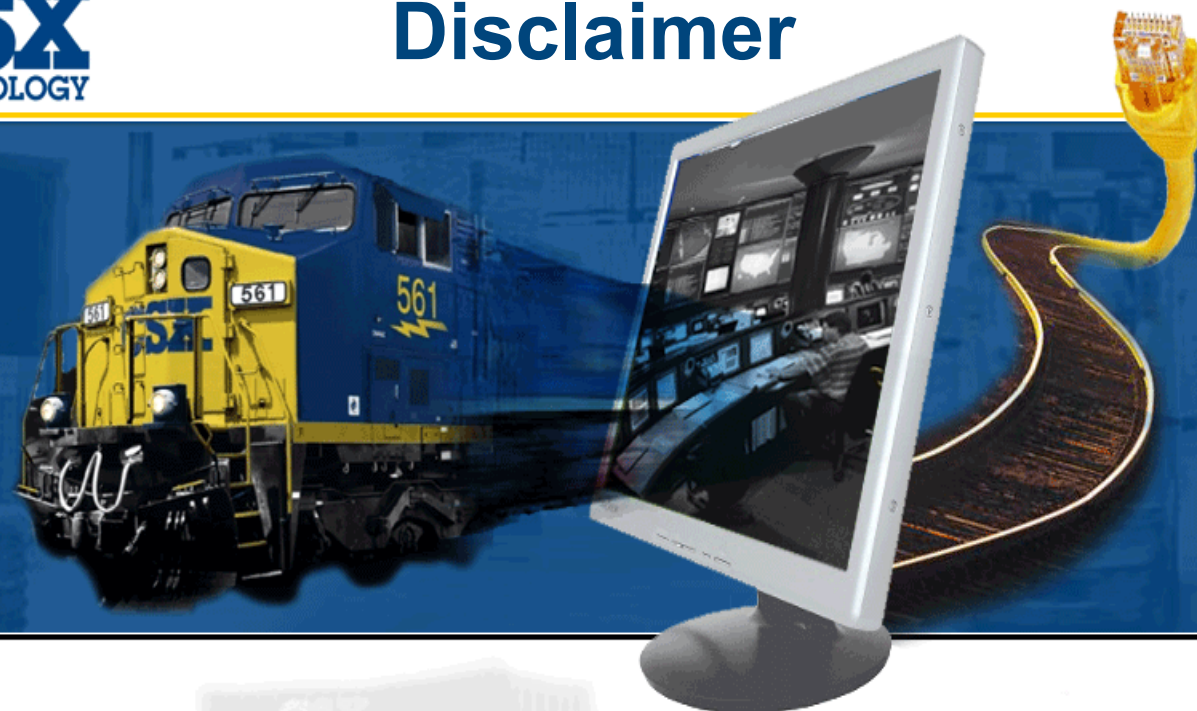
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2014 so far?**



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innovation.

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About the Presenter

- James Minks, CSX Technology
 - 28 Years in Technologies
 - Development
 - Technical Support
 - Project Management
 - 17 years at Oracle - Technical Support, Global IT, Development
 - Joined CSX Technology in February 2011
 - Project Manager for Project Controls at CSX
 - Project Manager for Hyperion HFM and Planning at CSX



About the Presenter

Mike Bonsignore
Sr. Manager, Technology Solutions
Atlanta, GA



Executive summary

Mike Bonsignore is the Southeast Leader of Grant Thornton's EPM practice. He has over 19 years of business and technical management experience. Over the last seventeen years Mike has focused exclusively on the implementation of Enterprise Performance Management and complete Business Intelligence architectures. Key activities have focused on working with executive management to drive business requirements definition, complete architectural design strategies (data source, ETL, relational modeling, multidimensional modeling and UI deployment) and program management. Mike is primarily engaged in directing and facilitating enterprise strategies aimed at establishing strategic architectures that promote long-term value and a true enterprise vision. Mike has worked in a variety of industries including Manufacturing, Software, Financial Services, Media, Hospitality, Telecommunications and Insurance.

Industries

- Distribution
- Financial services
- Hospitality
- Health care
- Insurance
- Life sciences
- Manufacturing
- Media
- Retail
- Technology
- Telecommunications
- Transportation

Technology

- Hyperion Financial Management
- Hyperion Planning
- Hyperion Essbase
- Essbase Studio
- Data Relationship Management (DRM)
- Oracle Business Intelligence (OBI)
- Oracle/Hyperion Reporting
- Oracle Relational Modeling
- Microsoft SQL Server

Education

Master Business Administration
BBA, Business Information Systems



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Agenda

- Introduction to CSX
- Introduction to Grant Thornton
- Where we Began (2005 - 2012)
- Discuss current usage of Oracle Data Relationship Management (DRM) within CSX Finance and Corporate Accounting
- Discuss CSX's DRM technology footprint
- What We Plan to Do Next (2014+)
- Q&A
- Websites and Email



CSX Overview



Our Vision

To be the safest, most progressive, North American railroad, relentless in the pursuit of customer and employee excellence

Operate in every major population and industrial center east of the Mississippi and two Canadian provinces

- \$11.9B in Revenue
- 21,000+ route miles / Over 32,000 employees
- 4,000 locomotives / 70,000 freight cars
- Operates an average of 1,350 trains per day
- Transports an average of 20,000 carloads per day
- Transports 6 million carloads of products and raw materials a year



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About Grant Thornton



Grant Thornton International

- Revenues of \$4.2B
- 600 offices worldwide
- Nearly 35,000 employees
- More than 2,800 partners



Grant Thornton LLP

- Revenues of \$1.2B
- 54 offices nationwide
- More than 6,000 employees
- More than 500 partners

VISION

To be the **leading** audit, tax and advisory firm, serving **dynamic organizations** in our **chosen markets**.



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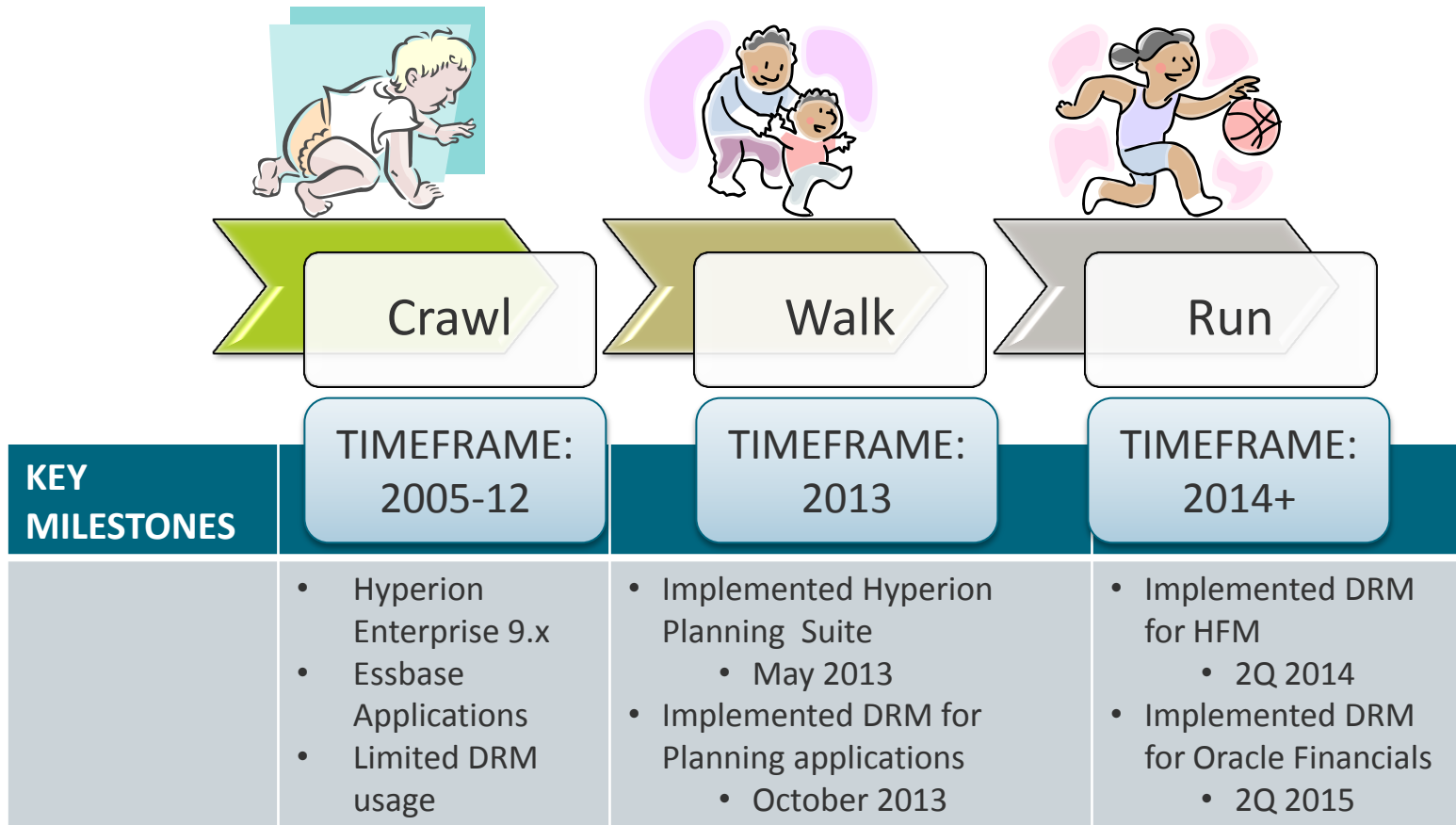
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Abstract

- CSX Transportation selected Oracle Data Relationship Management (DRM) to improve overall solution architecture in support of CSX's data governance strategy and Oracle platform investment.
- CSX integrated Data Relationship Management with
 - Hyperion Planning applications
 - Hyperion Financial Management
 - Hyperon Essbase.

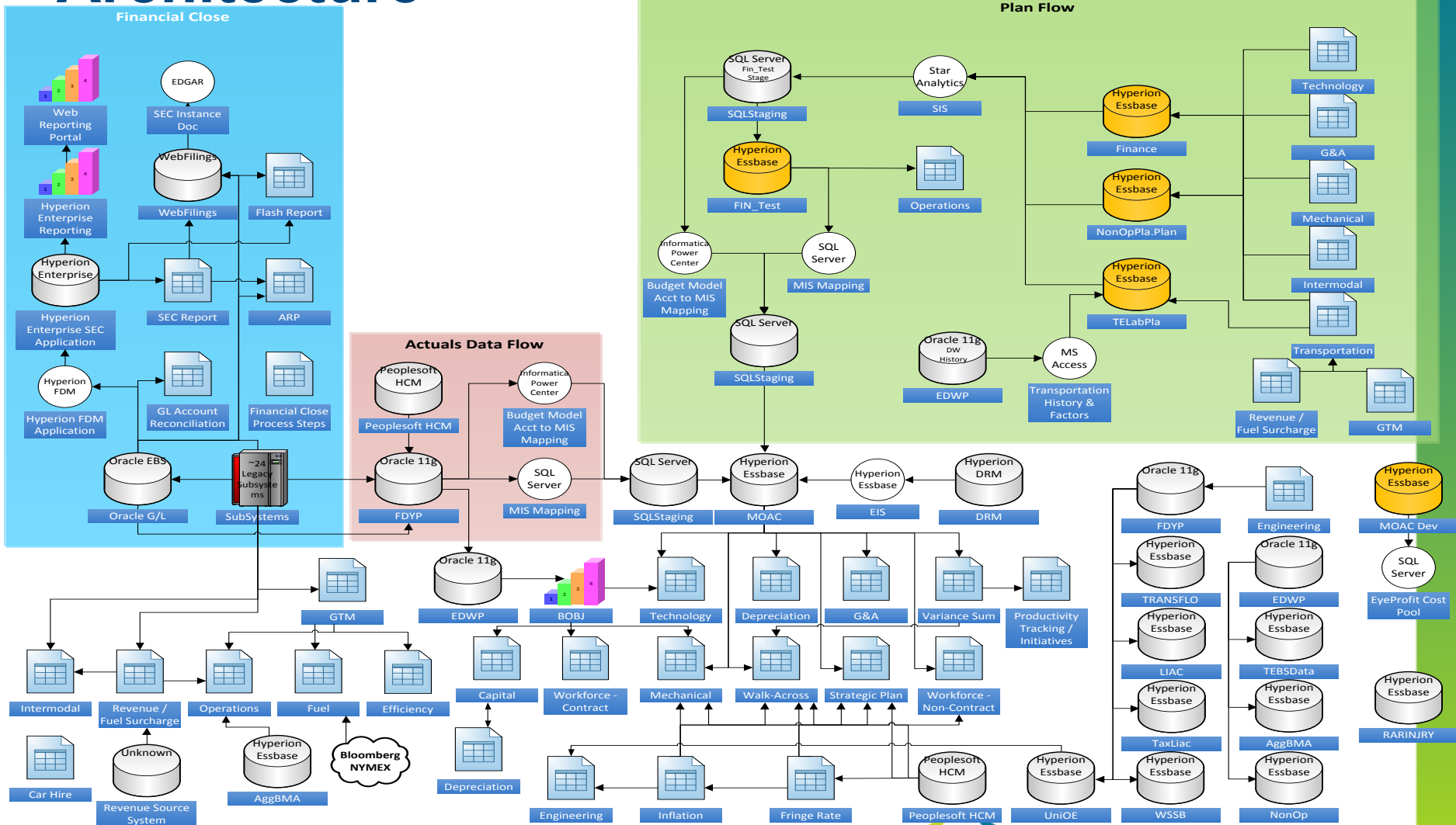


Where we Began (2005)



Prior CSX Financial Close and Planning Architecture

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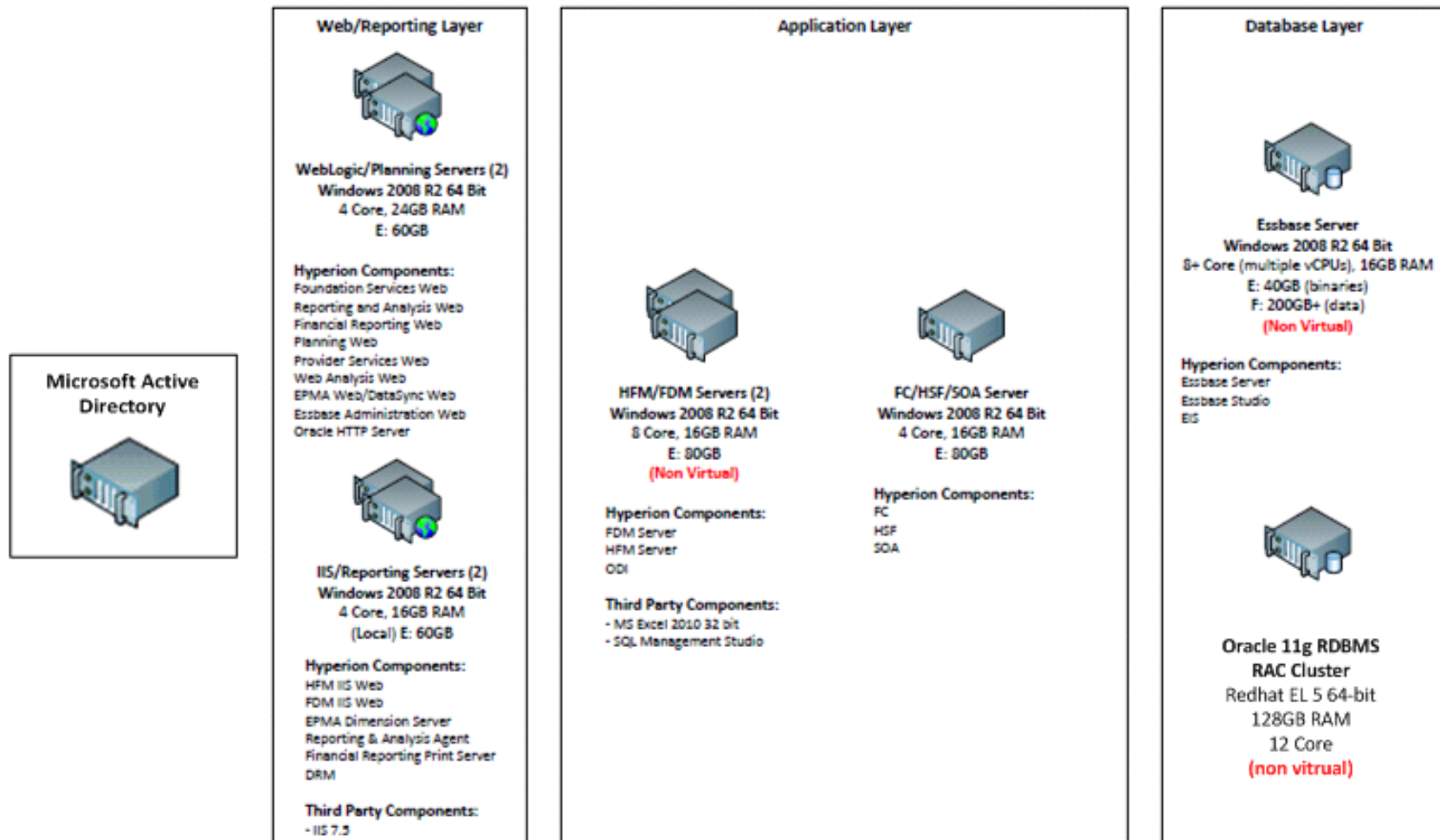


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Production Environment - Oracle EPM

11.1.2.2



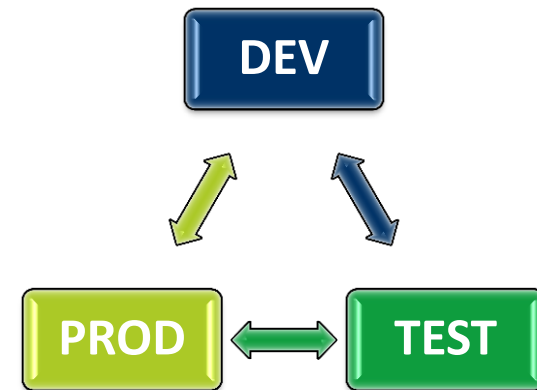
Drivers for Updating the Oracle EPM Platform

- Oracle Support is no longer supporting Hyperion Enterprise
- Limited Technical Footprint
 - Single Windows 2003 server running Hyperion Enterprise 9
- World-class enterprise solution
 - 99% virtual machines (Redhat LINUX EL5)
 - Exception: Oracle RAC cluster
- Dedicated infrastructure support team (Infosys)
- Improved change management processes



Implemented Quality Control Practices

- Implemented patching strategy
 - Patch Set Updates (PSUs)
 - One off patches
- Created multiple environments to support PROD (i.e. DEV and TEST)
- Create a proper path-to-production
 - develop in DEV
 - quality assurance in TEST
 - migrate changes to PROD after proper functional and performance assurances
- Implemented strict change control and quality assurance processes



Oracle Hyperion Enterprise Performance Management at CSX

Oracle Hyperion Financial Close Suite	Oracle Hyperion Planning
Hyperion Financial Management (HFM) Hyperion Financial Close Management (FCM) Hyperion Disclosure Management (HDM) Oracle Account Reconciliation Module (ARM) Hyperion Essbase Analytics Link (EAL)	Hyperion Planning (HPL) Hyperion Workforce Planning (Future) Hyperion Capital Planning (Future)
Oracle Integration Tools	Oracle Reporting Tools
Hyperion Data Relationship Management (DRM) Hyperion Financial Data Quality Management (FDM) Oracle ERP Integrator (ERPi) Oracle Data Integrator (ODI)	Hyperion Financial Reporting (FR) Hyperion Smart View for Office (Smart View)

Oracle Hyperion applications are the engine through which CSX performs its monthly, quarterly, and yearly close and plan submissions, makes consolidation adjustments, consolidates budget and forecast information and ultimately performs its external and management reporting.



Evolution of Data Relationship Management at CSX

Mike Bonsignore, Grant Thornton



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Evolution of DRM

- CSX was early adopter of Razza (original developer of DRM)
 - Tool in place for approximately a decade
- Tool was used for hierarchy management as opposed to data governance
 - Hierarchies were app specific primarily for Hyperion Essbase
 - Led to multiple iterations of common dimensions
 - Hierarchy management done through brute force
 - Maintained via Excel; limited communications among groups
- Was a **department** tool as opposed to an **Enterprise** tool
- No clear data governance vision
 - DRM not viewed as a driver; more of an afterthought
 - Led to ineffective governance model and reduced capability of the tool

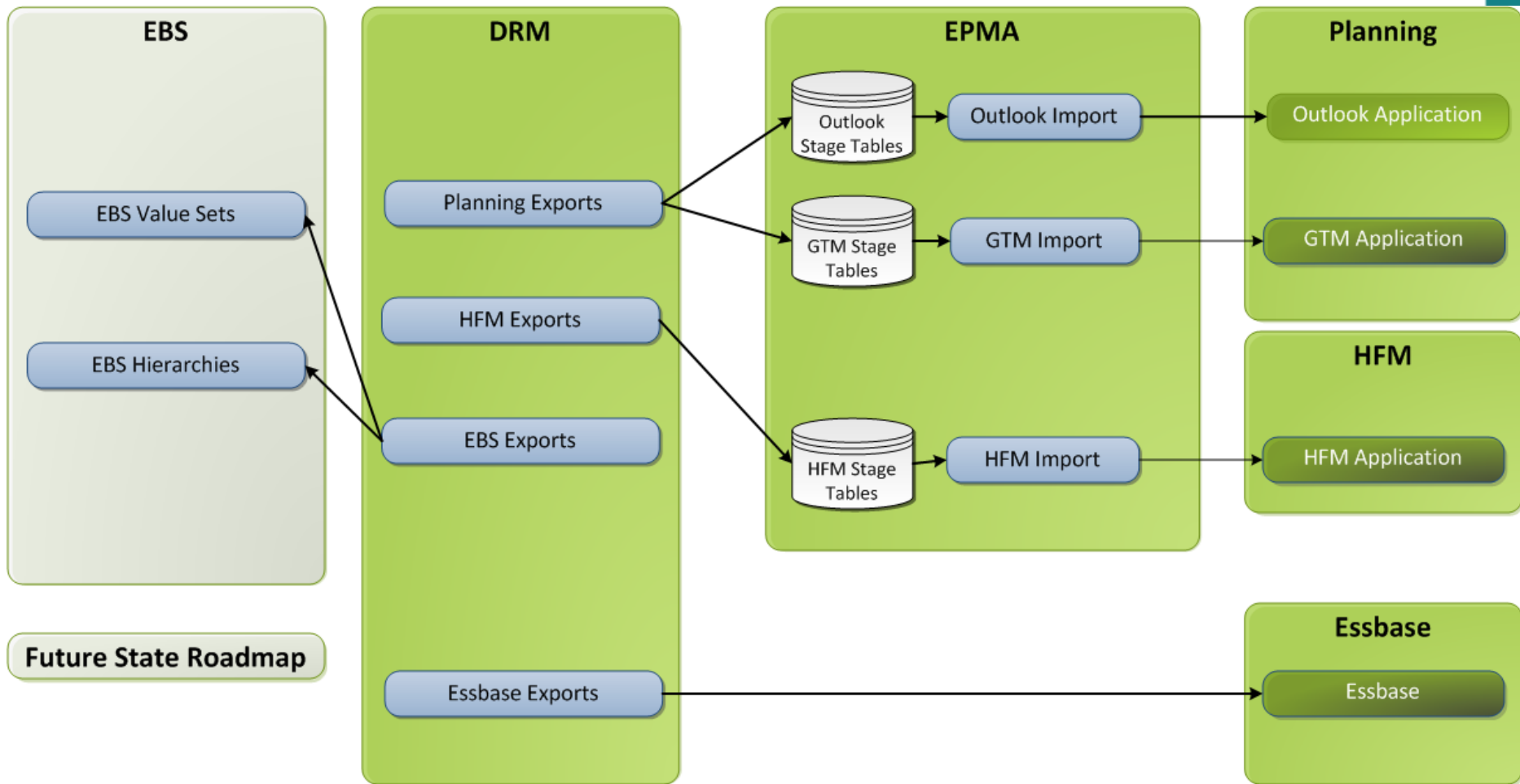


CSX Investment in Oracle

- CSX was already committed to the Oracle platform with use of Oracle eBusiness Suite and PeopleSoft HR
- CSX made decision to extend the Oracle platform with the adoption of Oracle Enterprise Performance Management (EPM) in 2012
 - Legacy Hyperion Enterprise and Essbase
 - Primarily focused on implementing Hyperion Planning and Hyperion Financial Management
- CSX's need to increase data governance became increasingly apparent with rollout of planning apps (Apr. 2013) and HFM (Oct. 2013)
 - Leading to better alignment of FP&A and Accounting solutions

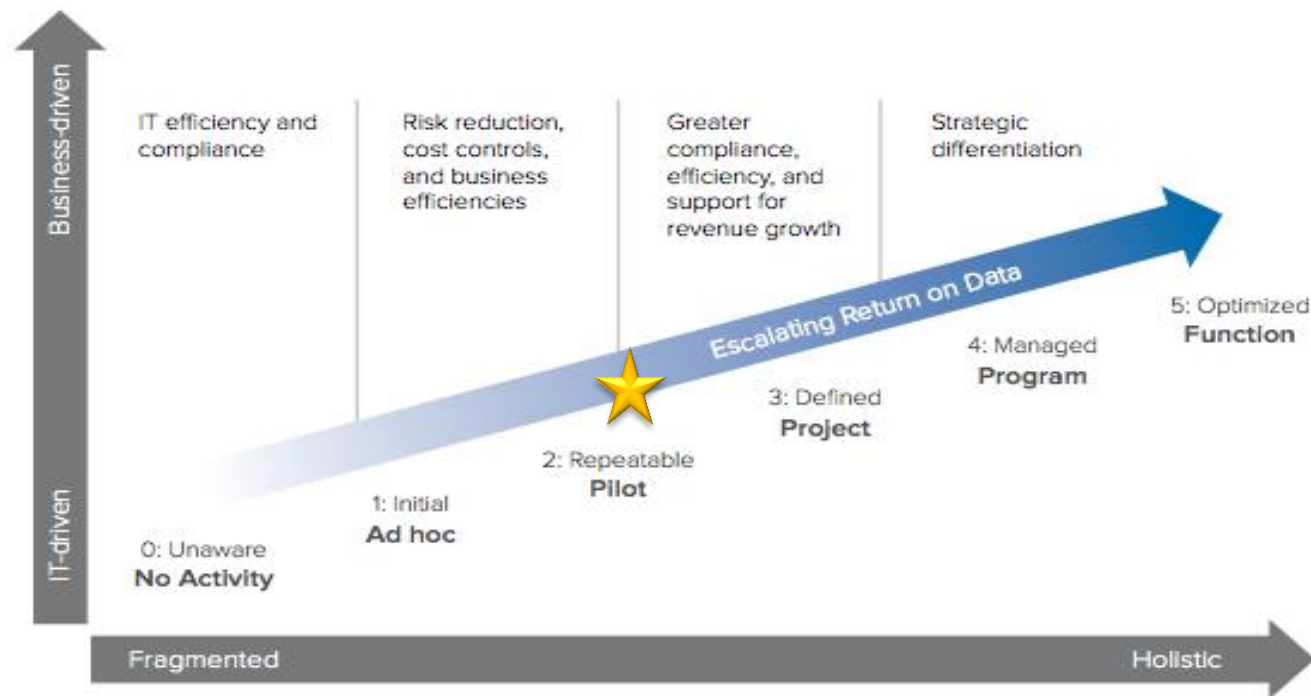


CSX DRM Architecture



CSX Data Governance Strategy

- Effective data governance does not come together all at once.
 - Below is a diagram that depicts the Data Governance Maturity models with 6 major milestones



Key Considerations for Implementing DRM

- Start with analytical reporting solutions first
 - Focusing on gain governance over outputs (i.e. reporting results)
- Align with data sources
 - Layer in integration back to transactional systems (Oracle GL and others) to align dimensionality at the source.
- Develop naming and usage standards
 - As governance is gained over dimensions and app hierarchies, avoid just building integrations. Standards will reduce ETL for data between systems.
- Maintain mappings in DRM
 - Ensure integrations do not require updating as hierarchies and dimensional values change.



Key Considerations for Implementing DRM

- Establish Process
 - Create a governance board to establish and enforce standards.
- Functional Enablement
 - Allow business to control branches and hierarchies with business rules and validations.



Lessons Learned

Start with DRM as a foundation to solution deployment. It should not be an afterthought or retrofitted.



Take a holistic enterprise view. Look across the organization to ensure common solutions are incorporated into data governance strategy.



Acceptance of data governance to applications should not be a choice. CSX Technology should mandate the usage. The business owners should manage the process.



Develop a data governance committee to manage, review and approve changes.



Next Steps for DRM at CSX

- Deploy DRM for usage with other CSX systems

Application	Target Date
Hyperion Planning	Complete (Oct 2013)
Hyperion Financial Mgt (HFM)	April 2014
E-Business Suite (EBS GL)	2014 (date TBD)
PeopleSoft	2014/2015 (date TBD)

- Establish and formalize governance committee and process



DRM Roadmap

Recommended Phasing

1. Establish upgraded DRM production environment as the **enterprise solution** for all analytical and financial hierarchy management.
2. **Don't let DRM-HFM integration momentum stop** – establish a plan and timeline for cutover, maintain DRM with ongoing HFM metadata updates until go-live.
3. Build upon the EPMA integration (Planning, HFM) already in place.
4. Link Planning and HFM to the Oracle eBusiness Suite.



CSX DRM Roadmap

Recommended Phasing (con't.)

4. Utilize DRM to enable updates to Planning models while still supporting current applications.
5. **Focus on an enterprise vision** and not individual point solutions. Determine other opportunities where data governance is needed, such as data warehouse, MOAC, BOAC, and solutions that leverage similar financial dimensionality and metadata.



Questions



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