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HYPERION

ORACLE HYPERION PLANNING

Oracle Hyperion Planning is a flexible Web and Microsoft Office based planning application that supports enterprise wide planning, budgeting, and forecasting. Oracle Hyperion Planning provides a rich planning and modeling framework that supports driver based planning to help connect operational assumptions to financial outcomes. It supports a hierarchical planning process that encompassing both corporate finance and the lines of business within an enterprise. With Oracle Hyperion Planning, you can meet your immediate financial planning, budgeting and forecasting needs while enabling a platform for future cross-functional expansion and automated process integration.

Streamline the Enterprise-wide Planning and Budgeting Process

Planning and budgeting is a resource and time intensive process in most organizations. It tends to be dominated by manual tasks involving a multitude of spreadsheets being exchanged between cost center managers, line of business finance managers and corporate finance personnel.

Oracle Hyperion Planning streamlines the planning process in an enterprise by aligning plans created across the organization along common dimensions such as cost centers, business entities and chart of accounts. Cost center plans can be linked to line of business plans which in turn can be linked to the corporate level plan. The impact of changes to key plan assumptions can be evaluated instantaneously and the revised plan can be made immediately available to all stakeholders without a time lag or risk of manual error. Oracle Hyperion Planning has a powerful calculation and business rules engine that can be used to express a range of business logic from simple arithmetic formulae to complex procedural multidimensional allocation rules. Oracle Hyperion Planning has guided task flow and supports both bottom-up and top-down planning processes. It has tools for budget administrators to monitor participants' progress submitting their plans and also has workflow and plan management capabilities that support the plan review and approval process.

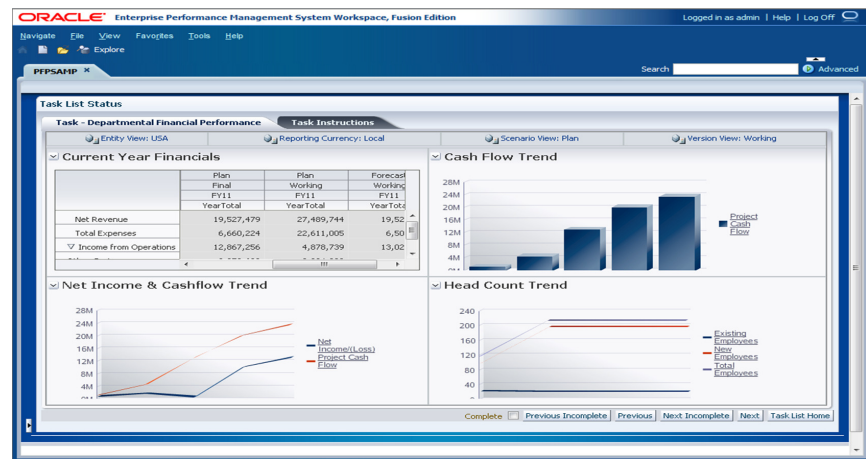## Improve Forecast Accuracy with Predictive Planning and Rolling Forecasts

Companies today are faced with a rapidly changing business environment. Demand is very volatile, costs fluctuate and the supplier landscape is constantly changing. These external factors require that organizations have the right capacity and skill sets within their workforce and the appropriate investments in capital and technology to stay competitive. A key requirement to stay ahead of the competition is to understand this volatility and forecast financial and operational performance accurately.

Oracle Hyperion Planning provides a sophisticated predictive forecasting capability that projects future performance based on historic information. This feature enables the validation of management forecasts and the creation of alternative scenarios. Oracle Hyperion Planning provides unlimited scenario analysis for planners to assess the impact of various combinations of business assumptions on key financial outcomes. Oracle Hyperion Planning also has a

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ENTERPRISE WIDE PLANNING, BUDGETING, AND FORECASTING

KEY FEATURES

- Multi-dimensional / multi user planning with a powerful business rules engine
- Flexible workflow and plan management capabilities
- Comprehensive Microsoft Office integration
- Easy to use Web interface
- Seamless creation of reports and dashboards
- Proven and scalable architecture
- Robust integration with ERP systems and other sources
- Full set of administrative tools for application management

KEY BENEFITS

- Reduce budgeting and planning cycles by weeks or months
- Improve forecast accuracy
- Appeal to a wider user community through an intuitive Web user interface
- Shrink the learning curve for users by leveraging Microsoft Office products as an interface into Oracle Hyperion Planning
- Eliminate time lag between when plans are updated and reports are refreshed
- Reduce cost of ownership thought superior application deployment, management tools and packaged data integration
- Lay the foundation for making the transition to Enterprise Business Planning

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rolling forecast wizard which makes it simple to implement a rolling forecast process in which the forecasting time horizon rolls forwards with the passage of time.

Connect a Wide User Community with an Intuitive Web Interface

Oracle Hyperion Planning enables business users to easily view plans and reports on the web and does not require them to have specialized computer skills. It provides a useful menu of tools to manipulate and adjust the plan through changing related data such as drivers or driver types or through performing allocations and spreads across multiple cells within a data grid. It also guides less-frequent users step by step through the planning process using a wizard-based Task List. This reduces cycle times while ensuring that plans are complete and reliable. For more sophisticated users Oracle Hyperion Planning supports ad hoc analysis of the data in the web form through supporting alternate configurations of page, row and column dimensions.
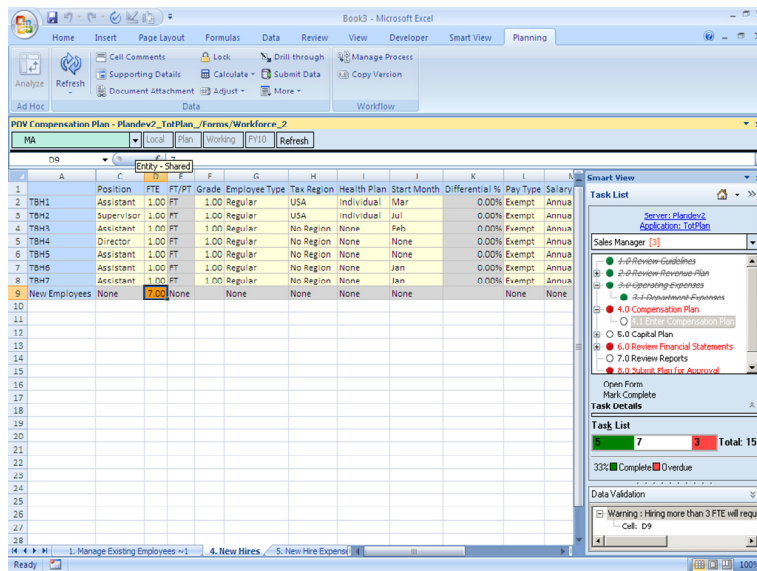

The intuitive Web interface of Oracle Hyperion Planning combines task lists, instructions, data grids and graphical reports

Leverage Existing User Competencies with Microsoft Office Integration

Oracle Hyperion Planning offers comprehensive integration with Microsoft Office tools such as Microsoft Outlook, Excel, Word and PowerPoint. Users can access planning tasks and due dates within Microsoft Outlook Task List and Calendar as well as within Microsoft Excel. Users can also view planning data forms from within Microsoft Excel with the same functionality as the web based interface. For example they have access to the same set of menu items and toolbars on the Web and in Microsoft Excel. They can also perform drill-ups and drill-downs on rows and columns in an identical manner in both interfaces. Both interfaces also support ad hoc analysis of data where rows, column and page dimensions can be pivoted differently to create different views of the same data. Common planning actions, such as spreading and allocation, are available as context sensitive right click menus on planning data forms rendered within Microsoft Excel. Oracle Hyperion Planning lets users take plans offline, and at their own convenience, change assumptions, perform calculations, analyze results, and then connect back to the central database to synchronize updates.

Additionally, users can directly integrate data from Oracle Hyperion Planning into Microsoft PowerPoint and Microsoft Word. This allows the creation of highly customized reports with accurate information and users can automatically refresh the report when the underlying data changes. The end result: reduced manual intervention, improved data integrity, and increased reporting accuracy.
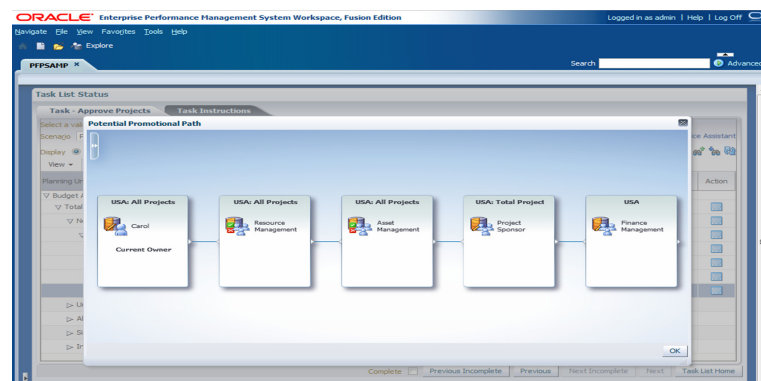
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The built-in Microsoft Office integration in Oracle Hyperion Planning allows users to update and report plans in Microsoft Excel, PowerPoint, and Word

Integrate Planning and Management Reporting seamlessly

Reports and dashboards that display plan and actual data can be created in minutes and any change 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.

Ease Collaboration and Maintain Control with Powerful Plan Management and Workflow

Oracle Hyperion Planning's powerful plan management and workflow functionality, including e-mail notifications, alerts, and task lists, 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 specified for each slice of the plan. When a planner "promotes" a plan for approval the system can automatically identify the next approver. Plan promotion paths can me made conditional on meeting certain criteria. 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.

Flexible and powerful planning process management and workflow capability allows the implementation of sophisticated review and approval processes

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Support Large Deployment with Scalable Architecture at low cost of ownership

Oracle Hyperion Planning is built on a scalable architecture, which allows organizations to, if appropriate, start with an initially small deployment before rolling it out to hundreds or thousands of 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 application security and data management, significantly reducing maintenance and distribution costs. Oracle Hyperion Planning interoperates with existing security mechanisms to help ensure maintenance and security consistency.

Ensure Data Quality with Robust Data Integration

Oracle Hyperion Planning facilitates bidirectional data integration with ERP systems, legacy applications, data warehouses, and other enterprise data sources. It is an open and extensible system that leverages data that was previously "locked" in silos and other systems.

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 and financial modeling, financial planning, budgeting and forecasting, workforce planning, capital asset planning, revenue and margin 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 along key dimensions such as product and customer segments and uses those insights to constantly drive change in business plans. In addition, it 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.

Contact Us

For more information about Oracle Hyperion Planning, visit oracle.com/epm or call +1.800.ORACLE1 to speak to an Oracle representative.

Hardware and Software, Engineered to Work Together

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