



THE FINIT MINUTE



Q4 2017

One of the core values at Finit is being ‘Advocate for the Best Interests of our Clients’. It is in this spirit of being an advocate for your interests we are reintroducing the Finit Minute newsletter, The goal is to provide key information to you around the EPM/CPM products that you use. (see our EPM Version & Support update below)

Looking back on 2017...

2017 has had its share of tragic events including Hurricanes Harvey, Irma and Maria. At Finit we believe in being advocates for our clients and our communities. We have had many friends, family, co-workers and clients affected by these events. As a group, we are proud to have donated close to 20k for hurricane relief through the American Red Cross.



Finit was fortunate to be on the Inc. 5000 list of fastest-growing companies for the 11th consecutive year. Most importantly, we continued to maintain 100% customer success rate; a goal that we have achieved through delivering unmatched experiences since our inception in 2002.

On behalf of our entire team at Finit – Happy Holidays! We look forward to delivering more unmatched experiences with you in the new year!

“We believe that creating value starts with aligning ourselves with your best interests and acting as your advocates”

ADVOCATES OF YOUR INTERESTS

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Oracle EPM Support and Version Update

The following is intended to outline Finit's understanding of Oracle's Support and Direction as of December, 2017. This information may change, and it is for information purposes only and in no way is a direct communication from Oracle. All discussion points should be confirmed directly with the Software providers before any decisions are made.

Over the last few years there has been a lot of confusion in regard to what is and is not supported. It is not easy to process all this information, so we have attempted to put it all in one place for you; To understand the various levels of Oracle support we suggest you [start here](#). For EPM specific applications here is a link to the [Oracle Lifetime Support document](#). Although the Lifetime Support document from Oracle states on page 16 that Hyperion products version 11.1.2.X are on premier support through 2020 there are important details to understand. If you go to page 20 and read the very small print at the bottom will you see a reference to a document on the Oracle EPM Software Error Correction Policy - the [link for that is here](#), this document has an attachment located here (You will need an Oracle ID to access these). The Error Correction Policy document outlines the support policy for the Patch Set Updates (PSUs) issued over the years. After reviewing the aforementioned policy, you would need to access the attached document which provides details on specific grace periods for clients to follow and upgrades in order to be on a PSU version that is receiving support for errors and bug fixes as well as recent 3rd party software compatibility (wasn't that an easy exercise?). Version 11.1.2.3 is currently on Premier Support and will receive updates, error corrections, bug fixes and 3rd party software compatibility through March 2018. Following Q1 of 2018, only version 11.1.2.4 will receive error corrections, bug fixes and 3rd party software compatibility through December 2020. Does this mean you have to upgrade? **NO...** you can stay on 11.1.2.3 (or any earlier version) until the 11.2 version is released in 2019, but you need to be aware of the situation. From Oracle's perspective, come April 2018, they are assuming that you will have installed the latest PSU(s). If you fail to do so you will no longer have access to Premier Support services. Paying for Premier Support means you implicitly agree to install all PSUs in a timely manner to get error/bug fixes in the code and in 3rd party software compatibility. If you run into some sort of software problem after the error correction grace period ends and call support the first thing they will likely tell you is to upgrade to 11.1.2.4.

On the infrastructure/technical side there is a whole separate conversation and set of issues revolving around operating system and database compatibility and support which boil down to these matrix's:

Microsoft Product	11.1.2.3 Compatibility	11.1.2.4 Compatability	11.2 Compatibility	Mainstream Support End Date (only security patches after this)	Extended Support End Date (no more security patches)
Windows Server 2008 R2	Yes	Yes	TBD	January 13, 2015	January 14, 2020
SQL Server 2008 R2	Yes	Yes	TBD	July 8, 2014	July 9, 2019
Windows Server 2012 R2	No	Yes	Expected	October 9, 2018	October 10, 2023
SQL Server 2012	No	Yes *(Except FCM)	Expected	July 11, 2017	July 12, 2022
Windows Server 2016	No	No	Expected	January 11, 2022	January 11, 2027
SQL Server 2016	No	No (TBD on PSU)	Expected	July 12, 2021	Juy 14, 2026

Oracle Product	11.1.2.3 Compatability	11.1.2.4 Compatability	11.2 Compatatibility	Premier Support End Date (pay extra after this)	Extended Support End Date
Database 11g R2	Yes	Yes	TBD	January 1, 2015	December 1, 2020
Database 12c (12.1)	Yes	Yes		July 1, 2018	July 1, 2021

As you can see above if the IT side of your company wants to move to Windows Server 2016 there will be an issue as that is not supported with any version of the Oracle Hyperion EPM stack today.

This leaves many clients with some very viable options:

- Stay on 11.1.2.3 (or earlier versions) until 11.2 comes out in the first half of 2019
 - Pro: Only one upgrade to worry about and it is in 2019
 - Support for 11.2 should last several years so this would take you out in the mid 2020's at least (Oracle is saying it will be until 2030 but that is not definite)
 - Con: If anything goes wrong after March of 2018 you will not get much help from Oracle support. They will just tell you to upgrade (and you are paying good \$\$ for that answer!)
 - You are missing out on any new features and functionality added since your version was released. Depending on your version this may be a serious consideration.
- Upgrade to 11.1.2.4 in the near future
 - Pro: You are on the latest supported version through December 2020
 - You are benefitting from any new features and functionality added since your version was released.
 - Con: To stay on the latest supported PSUs you will have to upgrade again to 11.2 in 2019 or 2020
 - You will have to migrate from FDM to FDMEE which adds \$\$ to you upgrade costs
 - 2 upgrades in 2-3 years will mean a larger spend of both time and \$\$
- Consider moving to a "Next Generation" tool
 - Many clients are now more mature with tools like HFM, Planning, and Essbase so redesigns are com mon to help extract more value from applications. This causes them to take a step back to review what is now available which includes:
 - Oracle Cloud Services tool (EPBCS, FCCS, OAC, and others) – Moving to these tools is an option which brings enhanced flexibility. This is Oracle's much preferred option for all their clients for a number of reasons (but that is another post all together)
 - OneStream – OneStream is an option and especially interesting for clients with more of a Windows (Azure) backend preference. Their pragmatic approach to CPM has a lot of people talking.
 - Others – Finit only supports the 2 software vendors mentioned above but there are others in this space.

Planning and Budgeting Cloud Service in 8 weeks



Finit helped this Financial Services company migrate their Oracle Hyperion Planning (Planning) application to Oracle's Planning and Budgeting Cloud Service (PBCS) in just under 8 weeks. Our Client found PBCS to be their best path forward for the following reasons:

- **No infrastructure cost** – Cloud-based tool hosted on Oracle environment, eliminating need for internal infrastructure cost and management of application
 - **Future product update “push”** – Product updates on a recurring schedule are pushed into your application; full product upgrades are not needed to obtain the latest, tested features
 - **Cloud platform advantages** – Oracle releases its latest updates and features on their Cloud platform first, resulting in bug fixes and enhancements being realized sooner.
- Technical enhancements:**
- **Application Redesign** –
 - Removing a dimension that was no longer used from one of three application plan types
 - Moving from detailed employee level planning to departmental level planning to achieve greater consistency across all groups
 - **Data Integration** –
 - **Inbound** - All mappings for our client were updated into the new data integration process using PBCS' Data Management
 - **Outbound** – Finit's team created a process to continue existing data exports and integrate these into our clients' external system
 - **Automation & Backups** – MaxL scripting was converted into the new EPM Automate for PBCS.
 - **Security** – All users of PBCS were setup as native users by using OIM (Oracle Identity Management)

HFM TO ONESTREAM WITH AZURE

Finit was fortunate to help our long-time client, one of the world's largest manufacturers and marketers of underwear and casual wear to replace their HFM environment with OneStream. This project was completed on time and under budget. With their solution in the cloud hosted by Microsoft Azure they will no longer face the frustrations that previously kept them up at night with their on-premises environment.

Some of the application highlights include:

- Custom built source system connectors to both Oracle EBS and Microsoft Dynamics AX – this allows for direct Drill-Back from OneStream to the Source System to see transactional level data.
- Custom built data sources for flat file loads as well as OneStream templates.
- Re-built current Cash Flow to provide 3-Dimensional detail and give them much more insight into their Cash Flow statement. (to learn more about the differences between traditional and 3-Dimensional cash flow [click here](#))
- Decreased the Entity hierarchy from 629 “Entities” (previously entities were a combination of Entity and location) to just 137 true Entities by moving location to another dimension.
- Elimination of redundant Custom dimensions used in HFM by rolling up the Department dimension differently in OneStream to support reporting needs.
- Re-built and optimized Brand allocations in OneStream using a Data Buffer rule
- Built custom Dashboards to support basic reporting and form input needs.
- Provided additional insight into Roll Forward Detail, which showed that HFM was incorrectly plugging certain amounts.
- Eliminated a major pain point by enabling OneStream Intercompany matching which was not previously used in HFM. Built validations, confirmation rules and certification questions to help ensure data quality – implementing a feature that was not previously used.

15 Years of Unmatched Experiences

Finit is proud to have reached our 15th anniversary as a company! We want to take this opportunity to thank our clients and partners for trusting us to deliver 'Unmatched Experiences' for their organizations. Our goal since 2002 has been to deliver value not only through excellent solutions, but also through integrity and advocacy on behalf of our clients.

Looking back on the past 15 years, it is amazing to think about the changes in technology, processes and business needs that have transpired. In 2002, the software solutions termed Enterprise Performance Management (EPM) / Corporate Performance Management (CPM) were in infancy – there was no cohesive solution for the office of the CFO, and the products and solutions were largely standalone. Over the last 15 years, Oracle Hyperion defined the EPM / CPM space by building up and growing their solutions. In addition, new vendors such as OneStream Software have emerged and brought exciting innovation and simplicity to the CFO organization. Finit has been proud to have partnered with Oracle Hyperion for the last 15 years and with OneStream software for the last 6 years. The evolution of solutions for the CFO organization in these 15 years has been exciting and challenging, and we are still thrilled to help guide our clients through it.

While a lot has changed, it is very interesting to think about what hasn't and what the future holds. The mentality of Finit has not changed in the past 15 years. We believe that tremendous value can be added to the CFO organization by designing and implementing the best possible CFO solutions. We also believe that we can improve the work-lives and decision making of those we work with by doing some very simple things: understand, design, create, lead, and beyond all that, serve.

In the future, the technology will certainly continue to change, and we look forward to helping our clients grow and adapt with it. We hope that all of our clients have enjoyed the experience of working with Finit's team as much as we have enjoyed working with you; we very much look forward to helping you continue to achieve your goals in the future.



- 300+ clients served
- 1000+ projects successfully delivered
- Tens of thousands of users trained
- 11 straight years on the Inc. 5000 list
- Growth to over 90 employees
- First consulting partner of OneStream and largest OneStream consulting practice of all partners
- 100% Client Success since our inception



FinIt Reaches Another Milestone - Client 300

We are excited and proud to announce Finit has entered into its 300th client partnership during 2017. We recognize and are humbled by the trust all our clients have placed in Finit since our inception 15 years ago.

We take our responsibility to all our clients very seriously, recognizing that the work we do together is both personal and purposeful. Our long-term client relationships are built on stewardship, integrity, and advocacy on your behalf, and we will continue to create value for every client by aligning ourselves first and foremost to your best interests. We also want to recognize the incredible group of consultants assembled at Finit. Their commitment to Finit values has helped us create a unique company providing us here at Finit with unmatched experiences, Finit would not have the stability or longevity in our industry without them.

Thank you to all 300+ our clients for giving us the opportunity to craft and deliver CFO solutions to your organizations and to support your vision and goals. We look forward to continuing these partnerships and creating unmatched experience together.