

Hyperion and Essbase Sales Planning

Business Problems:

Prior to the Hyperion solution, the Sales Planning and Reporting process utilized EBS, DW and Excel Spreadsheets. It was manually intensive because there was no centralized repository for all business units sales data. Analysts needed to download data from various databases and manually manipulate/calculate data each month. Sales Operations and Financial Planning Analysts worked with different sets of data leading to confusion about the right numbers resulting in intensive manual efforts to reconcile and report.

Project Solution

An Essbase Cube called SalePlan was built with key dimensions for Sales Billings such as Customer, Product, Business Unit, Product Family, Region, Territory, SalesRep and Measures such as billings, contra with Scenarios for Planning called Actuals, Budget, Goals. The data was brought in from multiple sources including EBS, Custom, SFDC, Mainframe, Quick Books into an ODS in SQL and then uploaded to Essbase Cubes and to Oracle's Incentive compensation module to enable goals to be managed from a single source. Reporting was performed using Hyperion Web Analysis and Smartview. In addition a Oracle ADF application was created to provide the daily sales information by SalesRep/Territory/Region/Business Unit with features such as filters, advanced filters etc. to allow for easy readability and accessibility.

Performance of various territories was managed by billing walkthroughs going through actuals vs goals. The WebApp was distributed to Sales, CS, Product Management and Finance. Daily processes are run automatically for EBS and for some Non EBS sources via Spreadsheet load to the Cube and WebApp Datastore