



White Paper

Why Now's the Time to Convert from Oracle Hyperion

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Introduction

Many organizations have relied on Oracle's Hyperion EPM applications for years to support their financial consolidation, reporting, planning and analysis processes. While these applications have provided business value, their fragmented architecture has made them costly to deploy, maintain and upgrade. With these applications approaching their end of life, Oracle is pressuring customers to migrate to its cloud-based EPM applications. But these solutions have the same architecture and challenges as their on-premise ancestors, and in some cases, don't offer equivalent functionality.

Before bowing to Oracle's pressure, smart Finance and IT organizations are considering and evaluating alternatives to Oracle Cloud EPM solutions. This white paper highlights the challenges organizations face with the legacy Hyperion applications, shortfalls of Oracle Cloud EPM applications, and the advantages customers are gaining by converting to OneStream XF, the proven alternative for global enterprises with sophisticated requirements.

Living with Yesterday's EPM Applications

Oracle's Hyperion enterprise performance management (EPM) applications have been in the market for over 15 years, and have helped many organizations improve their budgeting, planning, forecasting, consolidation and reporting processes. However, the fragmented architecture of these applications has made them costly to deploy, maintain and upgrade, especially for large enterprises with extensive deployments. Examples of the challenges customers face with the Hyperion applications include:

- Hyperion Enterprise is no longer supported by Oracle, causing compliance issues
- Data must be moved between Hyperion Planning and Hyperion Financial Management (HFM) to support actual vs. budget variance analysis
- Multiple instances of Hyperion applications are required to address the needs of both corporate and subsidiary or business unit planning and reporting requirements
- An additional module must be licensed to support centralized management of meta data across the Hyperion suite
- Upgrades to new releases can be very costly and disruptive to business processes

In recent years, Oracle has been shifting its R&D investment from their on-premise Hyperion applications to Oracle Cloud EPM applications. While this shift to cloud-based applications alleviates the need to set up and maintain infrastructure to support the applications, not much else has changed. The architecture of Oracle's Cloud EPM applications is still fragmented, and some of these applications are immature and lacking the capabilities of their on-premise ancestors. This results in several challenges for customers:

- Multiple applications required to address all performance management processes
- Data integration between applications is still a manual process
- Data integration with on-premise ERP systems is manual
- Loss of functionality when migrating from Hyperion applications to Oracle Cloud EPM applications
- Higher cost of ownership compared to other cloud-based EPM/CPM solutions
- Many sources of risk and issues with data quality

CPM 1.0 – Application & Product Silos

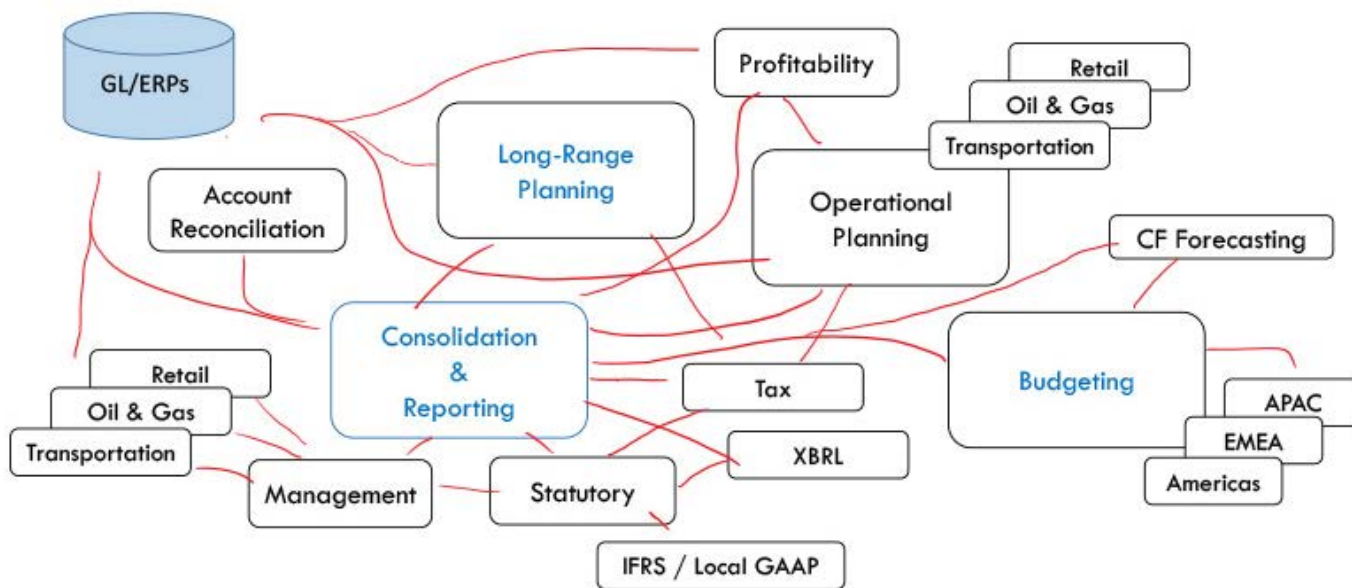


Figure 1 – Fragmented EPM Suites Create Risks

IT industry analysts and other experts in the industry are encouraging Oracle Hyperion customers to consider other alternatives before committing to migrate to Oracle's Cloud EPM applications. Viable and proven alternatives are available in the market that have more modern architectures, offer new capabilities, and support on-premise or cloud deployments. One of those proven alternatives is OneStream Software.

Introducing OneStream XF SmartCPM™

OneStream Software is the creation of Finance and Technology thought leaders in the CPM/EPM marketplace. Our founder's experience with the invention of two of the most successful CPM products in the world was an evolutionary step necessary to create OneStream XF.

OneStream CTO Bob Powers is the inventor and original architect of Hyperion Financial Management (HFM). Bob's last role with Oracle/Hyperion was as the Vice President of Development leading the development teams for HFM, Strategic Finance, DRM, and FDM (UpStream). OneStream CEO Tom Shea, along with CRO Craig Colby and COO Jeff DeGriek, founded UpStream Software.

UpStream Software was a three-time INC 500 Fastest Growing Private Company. Hyperion purchased UpStream in 2006 and renamed the product Hyperion FDM. Oracle subsequently purchased Hyperion in 2007.

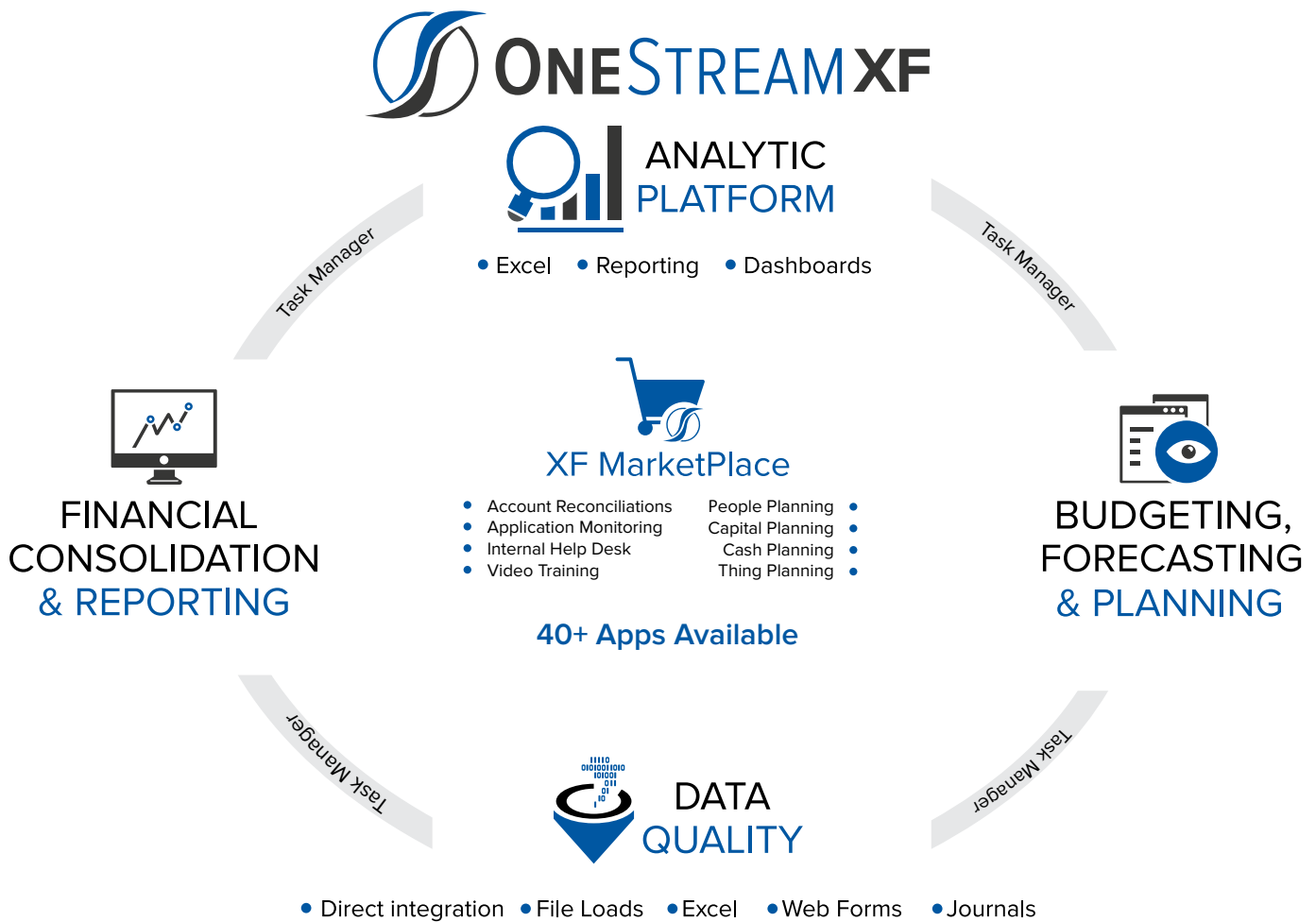


Figure 2 – OneStream SmartCPM™ Platform

OneStream provides a revolutionary corporate performance management (CPM) solution, the OneStream XF SmartCPM platform (XF stands for extensible finance). OneStream XF unifies and simplifies financial consolidation, planning, reporting, analytics and financial data quality for sophisticated organizations.

Deployed via the cloud or on-premise, OneStream is the first and only solution that delivers corporate standards and controls, with the flexibility for business units to report and plan at additional levels of detail without impacting corporate standards – all through a single application. We call this unique capability “Extensible Dimensionality™.” (figure 3)



Figure 3 – OneStream’s Extensible Dimensionality™

The hallmark of a SmartCPM solution is the capability of having multiple solutions for actuals, budgets, forecasts, plans, reconciliations, profitability and more all living together in a single application. Each solution benefits from leveraging all that the platform offers. OneStream XF eliminates risky integrations, validations, and reconciliations between multiple products, applications and modules.

Another unique capability of OneStream is the XF MarketPlace. The OneStream XF MarketPlace features downloadable solutions that allow customers to easily extend the value of their CPM platform to meet the changing needs of Finance and Operations. Examples of OneStream XF MarketPlace solutions that are already available and in use by customers include People Planning, CapEx Planning, Cash Planning, Account Reconciliations, Sales Planning, and many others.

Key Advantages and Benefits of OneStream XF

Hundreds of mid-sized to large enterprises around the world, across industries, have implemented OneStream XF and are seeing the advantages. In fact, 70% of our customers have switched from Oracle Hyperion on-premise applications, and others have migrated from legacy solutions offered by SAP, IBM and other vendors. Key advantages of OneStream XF include:

- One, unified application for financial consolidation, reporting, budgeting, planning, forecasting, analysis and data quality
- Deep functionality and scalability that meets the more complex needs of large, sophisticated, global enterprises
- Same solution can be deployed in the cloud or on-premise
- Extensible Dimensionality enables BUs to report and plan at a lower level of granularity without impacting corporate standards
- Integrated financial data quality ensures confidence in financial and operating results
- The XF MarketPlace allows customers to extend the OneStream XF SmartCPM Platform to deliver more solutions without adding complexity.

These advantages of OneStream XF translate into substantial business benefits that easily support the business case for replacing legacy applications and converting to OneStream XF. Examples of the business benefits include the following.

Reduces the time, effort and cost of maintaining legacy applications

- Replace multiple legacy systems with one unified application
- Reduce costs of ownership and upgrades
- Shifts Finance staff time from admin to value-added analysis

Simplifies financial close, consolidation and reporting

- Quickly collect, validate and integrate data from financial and operational systems, enable drill-through to transactional details
- Automate manual steps in the financial close/consolidation process
- Supports complex global consolidation and reporting requirements

Improves agility in budgeting, planning and forecasting

- Aligns BP&F with financial close and actual reporting
- Corporate plans and forecasts linked to more detailed operating plans
- Support more agile planning such as rolling forecasts and driver-based plans

Accelerates delivery of new applications, and business insights

- Unified platform enables standardization and reuse
- XF MarketPlace enables deployment of new applications quickly
- Extensible platform supports rapid creation of new solution
- Accelerates business insights and enhances decision making

Customer Examples

The following are a few specific examples from the hundreds of customers we have worked with and the benefits they have gained from migrating from Oracle/Hyperion applications to OneStream XF.



Melrose PLC – UK-Based Private Equity Investment Company

Melrose was using Hyperion Enterprise, Hyperion Financial Management (HFM) and Hyperion Financial Data Quality Management (FDM). They were looking for a more agile solution that offered true flexibility when acquiring and divesting businesses quickly while retaining historical data. They also wanted to reduce the burden of maintaining multiple products and integrations, and increase visibility into their data, meta data and process changes.

Melrose implemented OneStream XF for consolidation, management and statutory reporting, as well as weekly treasury cash flow forecasting. By implementing OneStream XF, Melrose had a single platform that complied with their statutory reporting requirements, improved analysis capabilities, increased audit controls and enhanced overall visibility. Additionally, by pushing the close process out to the businesses, OneStream XF made the close process faster and easier.



Johnson Outdoors - Outdoor Recreation Products Company

Johnson Outdoors was using Hyperion Enterprise and was looking to improve multiple Finance processes – consolidation, reporting, SOX compliance, budgeting, audit support and cash flow reporting. Consolidated operational and sales reporting was extremely time-consuming and painful. And multiple systems were needed to provide consolidated financial reporting, as well as detailed management reporting, to business unit controllers.

Johnson Outdoors implemented OneStream XF for financial consolidation and reporting, forecasting, budgeting and data quality management. Workflow approval levels give group controllers immediate access to their data, so there's no more waiting for corporate to run the consolidation process. Users can leverage OneStream XF to drill back to details in their JD Edwards warehouse, directly from their workflow process, when they need to investigate transactional details. Budgeting was delivered in under 2 months, and OneStream XF now delivers more detailed reporting and analytics in one unified product and application.



Federal-Mogul - Global Auto Parts Manufacturer and Supplier for OEM and Aftermarket

Federal-Mogul was using Hyperion Enterprise and was looking for a scalable solution that could be deployed globally over the web for financial consolidation and reporting, budgeting and analysis. The new system needed to be owned by the office of Finance. Federal-Mogul also wanted to give operationally relevant management reporting to the OEM and aftermarket businesses.

Federal-Mogul implemented OneStream XF for financial consolidation and reporting, budgeting, financial data quality management and HR data collection. With over 800 users, Federal-Mogul automated many steps and streamlined the financial close and consolidation process. The new system also delivers powerful management and ad hoc reporting for management and business users.



Guardian Industries - One of the World's Largest Manufacturers of Glass Products

Guardian Industries needed to replace their custom Hyperion consolidation solution and their home-grown financial reporting solution that relied on IT for improvements and maintenance. They needed a unified solution for all their financial consolidation and reporting, budgeting and analysis requirements. It had to be owned by the office of Accounting, and they also wanted to provide operationally relevant management reporting to the businesses. Finally, they needed to deliver an Accounting-controlled and maintained forecasting solution for their automotive trim division.

Guardian implemented OneStream XF to support financial consolidation, reporting, forecasting and tax data collection in one application all with unique and relevant account and dimension structures for each business unit. By automating tasks such as currency conversion and intercompany eliminations, Guardian has made the financial close process faster and easier.

Consider the Alternatives to Oracle Hyperion Applications

Oracle's Hyperion EPM applications were market-leading products in their day but they are costly to maintain and upgrade, and are falling behind as the market evolves. Oracle's Cloud EPM applications have the same fragmented architecture as their predecessors, have immature functionality, and are still costly to deploy and maintain. Organizations that are being pressured by Oracle to migrate to their cloud-based EPM applications should consider and evaluate their options.

OneStream XF is the proven alternative to Oracle Hyperion and other legacy applications, for medium to large enterprises with sophisticated requirements. It provides a unified, extensible CPM platform that allows organizations to modernize finance and reduce complexity in the cloud or on-premise. It simplifies and aligns financial consolidation, planning, reporting and data quality processes across the enterprise. The XF MarketPlace allows customers to extend their investment with pre-built solutions and customization capabilities.

OneStream Software enables Finance and IT professionals to **Get Back to Business**. To learn more, visit our web site at www.onestreamsoftware.com.

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