

EPMware Customer Success Story:

Excellus 



Background

Excellus BlueCross BlueShield finances and delivers healthcare services across upstate New York and long-term care insurance across the nation. Excellus is committed to being a community and business resource for healthcare security by providing financial strength, effective cost control, ease of use, and commitment to health improvement.

The Excellus finance team supports this mission with a variety of business and finance applications, including Hyperion Essbase and Hyperion Planning for data modeling, analytics, and planning. However, after upgrading from Hyperion 11.1.2.4 to Hyperion 11.2.x, they decided to replace the deprecated EPMA with a new metadata management solution instead of using DRM Lite or staying in “classic” mode.

“

EPMWare allows us to simultaneously update our five different applications at a pre scheduled time, ensuring that everything stays in sync and reducing the risk of human error.”

Patti Fingar

Finance Hyperion Administrator at
Excellus BlueCross BlueShield

The Problem

Human error and process inefficiencies create unreliable metadata.

Historically, the finance team handled change requests via a manual ticketing system. Users had to go through several steps within each application and make changes in multiple places. Manually validating these changes added an extra layer of inefficiency to the process and increased the potential for missed validations, such as duplicated members or skipped approvals.

This process was time-consuming and—like most manual processes—error-prone, which delayed issue resolution for end users and introduced inaccurate metadata into Excellus BlueCross BlueShield's critical planning applications.

Knowing that EPMA would no longer be available after upgrading to Hyperion 11.2.x, and that Hyperion's classic mode isn't built for efficiency or maintaining metadata integrity, the finance group began looking for a metadata management solution that met three core requirements:

- ✓ Audit trails to track who made changes, when they were made, and whether they deployed successfully.
- ✓ Automation to speed up key processes within its change request workflow.
- ✓ Validations and derivations to help protect its metadata's accuracy, consistency, and fitness for use.



The Solution

EPMware's direct deployment and dimension mapping simplifies metadata management.

When Excellus BlueCross BlueShield was evaluating metadata management solutions at ODTUG Kscope, EPMware's direct deployment to Hyperion's planning application and Essbase cubes made the platform stand out—along with its dimension mapping capabilities.

These features paired with EPMware's easy-to-deploy automated workflow, real-time validation, and full visibility into the metadata request process convinced the team that EPMware the right choice for Excellus BlueCross BlueShield's metadata management solution.

EPMware's centralized metadata management and data governance hub allows the finance team to manage, execute, and monitor all metadata operations from one interface. This creates end-to-end visibility into who changed what, where, when, and how—thus eliminating audit concerns for the change management process.

Using EPMware, Excellus BlueCross BlueShield can automatically route and track hierarchy changes through the review and approval process. Once the requests are approved and validated, EPMware seamlessly publishes the changes to all subscribing applications at once, eliminating the need to make manual changes in multiple places.

Prior to implementing EPMware, Excellus BlueCross BlueShield struggled to maintain accurate, consistent metadata due to cumbersome manual change processes and the inevitable human error that accompanied them.

EPMware's real-time scripting engine validates the accuracy and completeness of metadata before it is deployed. Errors, omissions, inconsistencies, and skipped approvals trigger visual prompts, ensuring Excellus BlueCross BlueShield's compliance and data governance standards are enforced throughout the process.



The Results

Immediate improvements in efficiency, metadata quality, and productivity.

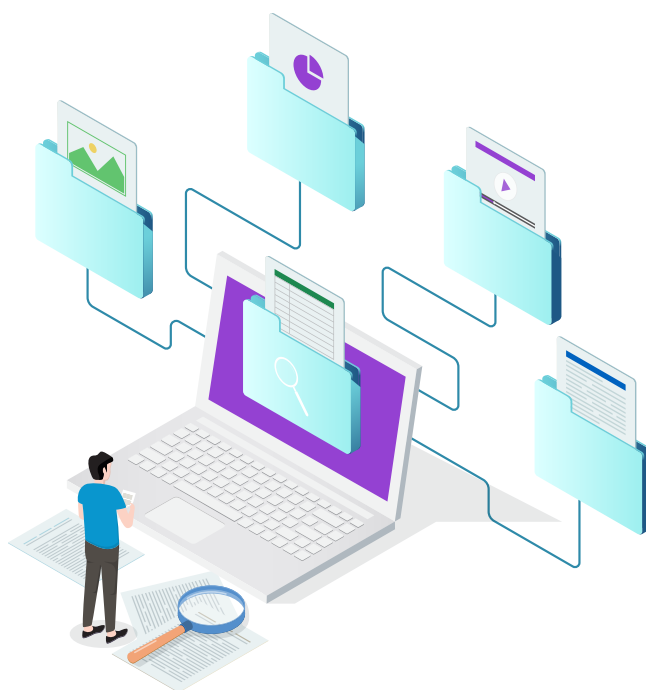
Excellus BlueCross BlueShield was able to integrate, test, and rollout EPMware in about six weeks, and the finance team saw an immediate improvement in its metadata management processes.

According to Patti Fingar, Finance Hyperion Administrator at Excellus BlueCross BlueShield, the most elemental benefit of implementing EPMware is that the team no longer has to rely on manual ticketing and email tracking to manage metadata requests.

“The logging and reporting allow us to quickly provide internal audit with a listing of all of our requests and shows every step from submission to completion including approvals.”

EPMware’s notification module alerts users when there is a validation issue and provides details about the cause. The automated approval system takes the guesswork out of who has or hasn’t approved a change, significantly reducing the amount of time spent tracking down request approvals and speeding up deployment time.

Additionally, EPMware has eliminated the downtime the organization experienced whenever IT updated Hyperion applications manually, and seamless integration of the metadata process between Excellus’s Lawson ERP and Hyperion EPM means its business applications are always on the same page.



About EPMware

EPMware stands out in the marketplace by combining metadata management and data governance capabilities in a single, intuitive platform. Built-in application intelligence makes managing hierarchies and data governance seamless and creates dimensional consistency across all subscribing applications.

Contact us today to schedule a live customized demo, get answers to your specific questions, and find out why EPMware is the right choice for your organization.

[Request a Demo](#)

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