

EPMware Customer Success Story:

TRANE
TECHNOLOGIES™

EPMWARE



Background

Trane Technologies (formerly Ingersoll Rand) used to rely on Oracle DRM for metadata management. As the business's change management environment became more complex, the company decided to simplify its metadata administration and replace manual data governance processes and application updates with a more automated solution.

After evaluating Oracle DRG for workflow and governance and Oracle EDMCS, Trane continued its search for a solution that better met its requirements and offered seamless integrations to keep HFM, Essbase, PBCS, OAC, and R12 in sync.

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The Problem

You Can't Manage Complex Metadata Efficiently with Manual Processes

Prior to implementing EPMware, Trane Technologies had a complexity problem.

The company was running five Hyperion applications, including Essbase, HFM, FDMee, and two different Planning applications. Workflow was handled via Excel and SharePoint, and change approvals were done manually, with a SQL staging environment to control mapping and DRM for metadata management. As of this article, Trane has successfully migrated to OneStream Smart CPM (an EPMware technology partner) to replace all Hyperion applications. More on this below.

One of the biggest challenges Trane faced was synchronizing metadata between application types with significant granularity differences. There was one full-time employee dedicated to the enterprise change control process who had to manually validate and scrub the metadata, verifying that the properties were scripted correctly before loading them into the DRM.

The second challenge was that Trane's governance process was mostly manual, which was both inefficient and risky.



Changes were placed in an Excel template attached to a SharePoint request. Because email notifications and automated reminders were not available, the governance team often had to remind reviewers multiple times to submit approvals so the request process could continue.

Another major governance concern was freeform SharePoint requests, which allowed users to escalate a request to any approver they chose. This lack of workflow enforcement created compliance risks when, for example, requests that needed legal approval skipped that step of the governance process.

The third challenge Trane needed to overcome was its cumbersome, Excel-based deployment process. The approved metadata was converted into DRM bulk import, then manually imported from DRM to the target applications. There were long wait times between metadata loads because of the effort required to update all of the dimensions. This effort was compounded over the number of dimensions and applications, which slowed data load time to the test application updates.

Finally, if QA found an issue that required rework in UAT, the request would have to be batched and the changes reloaded into each of the dimensions, further delaying deployment.



The Solution

A Unified Solution for Metadata Management and Governance

Today, after replacing DRM, the dimension update process has become much leaner.

EPMware's out-of-the-box adapters, standard request scripting, and automated dimension and property mapping allow users to make a change in one application and automatically sync that change across all applications. The built-in governance technology allows Trane to customize workflows at every step: requestor, approver, reviewer, deployment, and audit. From the web-based interface, the governance team can follow the progress of a request through each step and create an audit trail.

To maintain metadata integrity, real-time validations ensure all necessary information is entered at the point of request. If any information is missing, the request cannot be submitted until the error is fixed.

The Results

EPMware Transfers Ownership of Metadata to Trane's Business Users

At Trane Technologies, executing change request deployments used to take days. With EPMware, the process can now be completed in about two minutes per application.

In addition to transforming how the business manages metadata, one of the biggest advantages Trane Technologies gained by implementing EPMware is that users don't have to be trained as systems experts before receiving requests.



About EPMware

EPMware stands out in the marketplace by combining metadata management and data governance capabilities in a single, intuitive platform. EPMware has built-in application intelligence, so the process of managing hierarchies and data governance is seamless, creating dimensional consistency across all subscribing applications.

Designed by financial systems consultants with decades of implementation experience, EPMware brings effortless metadata management back to the business. Out-of-the-box, plug-and-play adapters allow for rapid implementation and configuration to supported applications, including all OneStream, Oracle On-Premise and Cloud EPM, EBS, Fusion, SAP applications, and many more.

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