

ERP

BI & EPM

Middleware

CRM / CX

Managed Services

Infrastructure



Case Study

# Lake County Streamlines Planning and Budgeting with Oracle Hyperion and Business Intelligence

## Lake County, Waukegan, IL

Lake County is located in the northeast corner of Illinois, midway between Chicago, IL and Milwaukee, WI.

- Population of 703,462
- 457 square miles of land
- Third largest county in Illinois
- Includes urban and rural communities
- Contains 219 taxing districts
- More than 33,000 housing units

## Oracle Applications

- Oracle Hyperion Public Sector Planning and Budgeting
- Oracle Hyperion Planning Plus
- Oracle Hyperion Financial Data Quality Management Adapters
- Oracle Business Intelligence (Financials, Procure & Spend, Human Resources Analytics)

## Services Provided

- Implemented a centralized planning and budgeting tool with Human Capital & Line Item planning capabilities.
- Enabled auto projections and forecasting capabilities while fulfilling personnel budgeting needs.
- Provided a BI tool with analytical and dashboard capabilities for GL, HR, and Procurement data.
- Reduced user latency by providing workflow-based approval features.

*"...came in with vast knowledge of the system and was willing and able to implement even more functionality here. ...was dedicated to ensuring that Lake County was getting all of the functionality that we wanted/needed out of the system. ... patience and commitment were crucial to this project's success."*

Lake County, Deputy Finance Director

## Business Needs

Lake County recognized a significant number of bottlenecks in their budget and planning process. They sought an analytical tool to meet their needs for budgeting at multiple levels (e.g., Line Item, Project and Human Capital), with a flexible and easy-to-use interface that would enable them to auto-generate budget projections and future forecasting. Ideally, a new solution would provide a single central repository for all personnel budgeting while tracking new position entry, position transfers or terminations across departments. Additional desired features included: automatic cost splitting, allocation across multiple chart segments, automatic calculation and transfer of salary and benefit numbers to line items, and capture of sub-item details and notes.

Lake County also desired increased visibility into their operations, finances, and other business areas at multiple levels. Quick and efficient access to business data would enable everyone in the organization, from senior management to end users, with capabilities to analyze past and present business situations and performance. Lake County wanted to provide a transparent view of their organization to support their decision-makers with more current and robust information.

## Services & Benefits

AST enabled Lake County to achieve their planning and budgeting goals. Jointly, we implemented Oracle's Hyperion Public Sector Planning and Budgeting solution, which provides Lake County with the required budget entry and analytical capabilities, such as auto projection, baseline creation, forecasting, auto funds transfer, smart reporting and more. Real-time integration with their source GL system keeps all data and chart-of-accounts segments synchronized, while supporting a scalable and robust personnel budgeting and planning model. Lake County's central budget team and individual departments track positions along with salary and non-salary components of compensation.

As part of this effort, a Business Intelligence Data Warehouse was deployed to provide a central location for Financial Analytics. This enables the CFO and Finance Department to aggregate data and quickly report on key performance measures by organization and account group. Budget analysts are able to create complex analyses, previously done by running multiple reports. Procurement and Spend Analytics tools provide purchasing officers with quick insight into how the organization is spending by geographic region and purchase type, both of which were previously difficult-to-compile monthly reports. HR Analytics gives managers the ability to review absence trends and monitor department overtime usage. Bringing these analytics together created a department-based dashboard where managers can effectively review the critical components on performance of their subordinates.

APPLICATIONS SOFTWARE TECHNOLOGY CORPORATION

[www.astcorporation.com](http://www.astcorporation.com) | 888.278.0002 | [info@astcorporation.com](mailto:info@astcorporation.com)



AST Corporation services encompass all aspects of Oracle E-Business Suite Applications and Technologies, Business Intelligence/Enterprise Performance Management, Oracle Fusion Middleware, CRM and Managed Services. Our unblemished track record, combined with our Oracle Platinum partnership and our exclusive focus on Oracle software will enable you to undertake the most challenging projects with confidence.

