



CASE STUDY

# Orange County Transportation Authority

Oracle Planning and Budgeting  
Cloud Service Solution



# At a Glance

## CHALLENGES

*Decades old, custom-built* planning, budgeting, and forecasting application

*Complexity* of Workforce Planning, Revenue and Expense budgeting, Fund balancing, Cashflow's, Position Control, Reporting, and Dashboard logic

*Ability to integrate* with current source systems (OneSolution, Lawson)

## SOLUTION

*Oracle Planning and Budgeting Cloud Service* (PBCS)

*Licensing* PBCS and Oracle Enterprise Performance Reporting Cloud (EPRCS)

*Functionality* that addresses core budgeting, long range planning, and reporting requirements

*Integration* with Oracle Data Management, OneSolution General Ledger, Lawson HR & Payroll, and Oracle Smart View

*End-user training* and post-implementation support

## RESULTS

*Integrated and secure* planning, budgeting, and long-range planning solution

*Cloud based modern platform* developed with similar look and feel to original system

*Flexible, scalable framework* for future expansion

*Process redesign* to provide streamlined process

# INTRODUCTION

The Orange County Transportation Authority (OCTA) is the public sector transportation planning body and mass transit service provider for Orange County, California in the Los Angeles metropolitan area. The agency is the second-largest public transportation provider in the metropolitan area after Los Angeles County Metropolitan Transportation Authority.

Its ancestor agencies include not only the prior Orange County Transit District but also such diverse entities as the Pacific Electric Railway and the South Coast Transit Corporation. In 2005, OCTA was judged America's Best Public Transportation System by the American Public Transportation Association for its record gains in bus and Metrolink commuter trains ridership that it operates or funds. OCTA also operates the 91 Express Lanes.

For more information on OCTA, [visit their website.](#)







## PROJECT BACKGROUND

Previously, OCTA employed a custom-built budgeting and planning application called BudBar that was overly complex, prone to error, and difficult to administer and support. The system presented several challenges, including:

- Being outdated and not user friendly
- Complexities due to mapping that relied on a 16-digit accounting control key
- No single source of truth system
- Irregularities in source system data
- Difficult processes for import/export transformation

## WANTS AND NEEDS

OCTA required a new and modern cloud-based budgeting, planning, forecasting, and reporting solution with a strong calculation engine that could integrate with their current source systems (OneSolution and Lawson).

## OUR SOLUTION

Wanting to move to a cloud-based enterprise-level solution, OCTA requested an **Oracle Planning and Budgeting Cloud Service** implementation. Oracle's **PBCS** provides stable, repeatable processes, security, strong calculation logic, and the flexibility to extend the system to additional users as needed. Additionally, it allows for application expansion in the future. Benefits of **PBCS** specifically suited to OCTA's needs include:

- Integration process with **OneSolution General Ledger and Lawson HR and Payroll**
- Logic to support 40-year cashflow projection
- **Oracle Smart View** reporting that allows for end user reporting vs. administrator developed reporting
- **Oracle Enterprise Performance Reporting Cloud Service** reporting that allows for creation of budget books and annual reports

## IMPLEMENTATION & DEPLOYMENT

The Clarity Partners Consulting team worked closely with OCTA to design, develop, test, and implement their new financial planning application within a five-month time frame. Using an iterative and agile implementation approach, Clarity designed and developed two environments – development and production – for **Oracle PBCS/EPRCS** and **Essbase**, the underlying database engine.

Clarity also developed the necessary integrations with:

- **Oracle Data Management**, which serves as the single point of data integration between **PBCS** and OCTA's source systems, **OneSolution and Lawson**.
- **Oracle Smart View**, which allows for integration with the Microsoft Office Suite for ad-hoc reporting purposes.

Clarity was responsible for end-user training services and materials, while also performing all testing, deployment, cut-over and go-live activities. Additionally, Clarity provided eight weeks of post-implementation support.

## BENEFITS FOR OCTA

- Reduced costs with a cloud-based system
- Scalable, automated platform that is easy to use with a similar look and feel to original system
- Cashflow, Forecasting and “What-If” modeling capabilities
- Budget book and annual report automation with **EPRCS** reporting
- Streamlined processes
- Secure access to data and application design
- Framework in place for future expansion
- Less reliance on private contractor for support



## WHAT'S NEXT

Clarity is the reseller of all current licenses, and we are currently negotiating an additional license expansion. The plan is for OCTA to be able to execute even more robust budgeting in the future. OCTA is also considering purchasing Oracle Profitability and Cost Management Cloud Service (PCMCS) to easily allocate the cost of shared services to the departments and groups that use them. Lastly, this should eliminate all cost transparency issues regarding allocation because that information is now displayed.

## CONTACT US TODAY TO LEARN MORE

### Clarity's EPM Team

[epm@claritypartners.com](mailto:epm@claritypartners.com)

### Clarity Partners

312.920.0550

20 N Clark St #3600

Chicago, IL 60602

