Hyperion Data Relationship Management (DRM) 11.1.2
EPM Partner Training  
March 31, 2010

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Oracle Industries Business Unit
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Agenda

What’s new in DRM 11.1.2?

• DRM messaging:
  – Winning tactics
  – Enterprise Dimension Management
  – Dimension Management Maturity Model
• DRM 11.1.2 (Talleyrand) features
• Hands-on workshop (core UI)
• Roadmap highlights
• Hands-on workshop (administration)

“You can do anything with bayonets ... except sit on them”

Charles Maurice de Talleyrand-Périgord
DRM Messaging:

Winning Tactics
Enterprise Dimension Management
Dimension Management Maturity Model
Winning Tactics for DRM

• We **win large deals** when…
  – EPM products are in place or we are leading
  – Dedicated time for discovery, developing use cases and value
  – DRM is positioned relative to the **three use cases**
  – Customer exhibits one or more of the **five motivators** for DRM

• We **lose revenue** when…
  – We oversell the capabilities of EPMA
  – DRM is “thrown in” late in the deal cycle

• Tips and tricks…
  – **Don’t** position DRM as part of Oracle MDM – you’ll get directed to IT
# DRM Use Cases

"Functional use cases" for DRM

<table>
<thead>
<tr>
<th>USE CASE</th>
<th>LOOK FOR</th>
<th>INDICATORS</th>
<th>WHO CARES?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Alignment</td>
<td>EPM with GL (SAP, EBS, or PeopleSoft financials), multiple general ledgers</td>
<td>Challenges closing the books, researching and reconciling discrepancies</td>
<td>• Comptroller</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• VP Accounting</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>• VP Finance</td>
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<td></td>
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<td>• CFO</td>
</tr>
<tr>
<td>Enterprise Dimension Management</td>
<td>Multiple data warehouses and data marts, mix of data warehouse and Essbase</td>
<td>Measures don’t tie out across reporting sources (i.e. total sales for a product category is off)</td>
<td>• VP Business Intelligence</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• FP&amp;A</td>
</tr>
<tr>
<td>Reference Data Management</td>
<td>Mainframe or legacy systems, legacy mixed with EPM</td>
<td>Keeping EPM and BI applications aligned with &quot;logical codes&quot; in the mainframe</td>
<td>• VP Operations</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• VP Finance</td>
</tr>
<tr>
<td></td>
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<td></td>
<td>• FP&amp;A</td>
</tr>
<tr>
<td></td>
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<td>• CFO</td>
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</tbody>
</table>
# Dimension Management Motivators

## Leading discovery questions

<table>
<thead>
<tr>
<th>BUSINESS DRIVER</th>
<th>DISCOVERY</th>
<th>WOULD YOU LIKE TO…. (DRM VALUE)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Restructuring</td>
<td>How often do you financially reorganize your business?</td>
<td>• Collect, analyze and compare past, present and future financial models</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Create and distributing new financial models</td>
</tr>
<tr>
<td>Compliance &amp; Audit</td>
<td>How do you manage compliance regarding changes to reporting structures?</td>
<td>• Drive accuracy and governance into financial reporting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Prevent SEC Investigations, de-listings, restatements</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Streamline internal and 3rd party audit process</td>
</tr>
<tr>
<td>Common Chart of Accounts</td>
<td>Do you hope to standardize your CoA across systems or business units?</td>
<td>• Iteratively model corporate standard account structure</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Collaboratively map existing CoA's to standard CoA</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Federated security, adaptable validations</td>
</tr>
<tr>
<td>Ledger Implementation or Migration</td>
<td>Will you be migrating to a new GL or Financials system?</td>
<td>• Design new account, cost center, product codes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Collaboratively map existing codes to new codes</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Manage multiple environments in parallel</td>
</tr>
<tr>
<td>Mergers &amp; Acquisitions</td>
<td>Recent or impending merger activity?</td>
<td>• Model pre and post acquisition financial structures</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Deliver a controlled, auditable workspace</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Quickly and iteratively map and align chart of accounts to support consolidated reporting</td>
</tr>
</tbody>
</table>
## DRM Roles

**Value added by DRM during an implementation**

<table>
<thead>
<tr>
<th>ROLE</th>
<th>FUNCTION</th>
<th>CORE FEATURES</th>
</tr>
</thead>
</table>
| Dimension & hierarchy analysis | • Load multiple versions of critical hierarchies into DRM  
• Look for overlaps, gaps, naming collisions  
• Analyze attribution  
• Supports GL consolidation, M&A activity, what-if planning, … | • DRM Import, Blend, Compare  
• DRM versioning model  
• DRM property definitions                                                                 |
| Dimension ‘normalisation’   | • Use DRM to merge hierarchies into simpler set of core dimensions                                                                                                                                        | • DRM drag & drop’ hierarchy maintenance  
• DRM Node types  
• DRM Compares  
• DRM Action Scripts (Automator)                                                                                                               |
| Ongoing dimension maintenance | • Use DRM to maintain and align enterprise dimension hierarchies  
• Enforce business rules  
• Track & audit users’ changes  
• Alignment across systems  
• Enforce processes & workflow                                                                                                              | • DRM Versioning model  
• DRM transaction history  
• DRM Validations  
• DRM Exports and automation  
• DRM workflow integration                                                                                                                  |
What are Enterprise Dimensions?

Measures of value

- Classify transactional & analytical data
- Reflect how the enterprise measures value
- Shared across multiple business functions & systems
- Usually hierarchical, often inter-connected

<table>
<thead>
<tr>
<th>FINANCIAL</th>
<th>ORGANIZATIONAL</th>
<th>ANALYTICAL</th>
</tr>
</thead>
</table>
| - Charts of accounts:  
  - Support multiple accounting standards (IFRS, US GAAP)  
  - Cost centers | - Organization hierarchies  
  - Legal entity structures  
  - Suppliers / vendors / customers  
  - Location hierarchies:  
    - Store locations  
    - Regional management  
    - Business segmentation  
    - Sales channels | - Cross-dimensional mappings  
  - Intercompany mappings  
  - ‘Alternate’ roll-up structures  
  - Consolidated external reporting  
  - Support multiple jurisdictions |
Oracle EPM and Dimension Management
Connecting management processes

Common Reporting & Interaction

Strategic Planning

Planning & Forecasting

Financial Close

Profitability Management

Common Integration & Analysis
Data Quality and Enterprise Dimension Management
Enterprise Dimension Management
Alignment and consistency

Enterprise Dimension Management

Global & Local Alignment
System Migration

Re-org & Acquisitions
Governance & Compliance

Consistent Dimensions across EPM, BI, DW and ERPs
Hyperion Data Relationship Management
# Value of Enterprise Dimension Management

**Do you see any of these symptoms?**

<table>
<thead>
<tr>
<th>SYMPTOMS</th>
<th>SOLUTION</th>
<th>VALUE</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Unexplained <strong>reporting inconsistencies</strong> requiring complex reconciliation</td>
<td>• Complete audit trail &amp; governance of all changes to enterprise dimensions</td>
<td>• Opportunities for reporting inconsistencies significantly reduced</td>
</tr>
<tr>
<td>• Uncertainty over <strong>compliance</strong> (Sarbanes-Oxley, Basel-II, etc.)</td>
<td>• Integration with workflow request and approval processes</td>
<td>• Compliance with regulatory standards simplified</td>
</tr>
<tr>
<td>• No visible <strong>audit trails</strong> for changes to critical dimensions</td>
<td>• Single ‘system of entry’ and ‘system of record’ for all dimension maintenance</td>
<td>• Financial close times can be reduced</td>
</tr>
<tr>
<td>• Complex, parallel <strong>workflow</strong> processes required to ensure dimensions are synchronized</td>
<td>• Enterprise dimensions aligned across participating applications</td>
<td>• Tangible cost savings from the elimination of multiple, parallel, dimension maintenance processes</td>
</tr>
<tr>
<td>• Dimension maintenance requires the <strong>support of IT</strong> groups</td>
<td>• Dimension maintenance devolved to local data stewards</td>
<td>• Integration of new systems and applications will be quicker, more reliable and less costly</td>
</tr>
<tr>
<td>• Multiple point-to-point <strong>integration</strong> processes required to feed dimension changes across systems</td>
<td>• Business rules defined by the business &amp; enforced consistently</td>
<td>• Need for complex approval processes reduced</td>
</tr>
<tr>
<td>• Uncertainty over the location of a “<strong>system of record</strong>”</td>
<td>• Automation of the calculation of many hierarchy attributes, through a formula engine or by inheritance rules</td>
<td>• Streamlined M&amp;A processes</td>
</tr>
</tbody>
</table>
## Dimension Management Maturity Model

### From “scattered” to “governed”

<table>
<thead>
<tr>
<th>Characteristics</th>
<th>1 - Scattered</th>
<th>2 - Home-made</th>
<th>3 - Centralized</th>
<th>4 - Aligned</th>
<th>5 - Governed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maintenance process</td>
<td>Scattered, local processes for each instance of each application</td>
<td><em>Ad hoc</em> spread-sheets and MS Access DBs for specific domains</td>
<td>Central repositories force synchronization for groups of systems</td>
<td>Central repositories recognize varied needs of participating systems</td>
<td>Unified, controlled environment for all changes</td>
</tr>
<tr>
<td>Maintenance responsibility</td>
<td>IT, for each silo application</td>
<td>Business users, but IT needed to integrate changes.</td>
<td>Technical administrators (business or IT)</td>
<td>Central functions (eg. Corporate Finance)</td>
<td>Local business experts (‘data stewards’)</td>
</tr>
<tr>
<td>Dimension alignment</td>
<td>Mis-alignments surface as reporting inconsistencies</td>
<td>Some point-to-point integration using ‘black box’ ETL</td>
<td>Complex point-to-point integrations</td>
<td>Central integration ‘hub’ using ‘open’ ETL processes</td>
<td>Single ‘system of entry’ ensures alignment</td>
</tr>
<tr>
<td>Data governance</td>
<td>Not possible</td>
<td>Limited governance for some subject areas</td>
<td>Centralized control enforced by tools</td>
<td>Central functions apply governance</td>
<td>Governance delegated to business experts</td>
</tr>
<tr>
<td>Workflow processes</td>
<td>No consistent workflows</td>
<td>Inconsistent workflow for each solution</td>
<td>Multi-step approval processes</td>
<td>Complex workflows to ensure data quality</td>
<td>Simplified request &amp; approval mechanism</td>
</tr>
<tr>
<td>Indicators</td>
<td>• Fear of regulatory non-compliance</td>
<td>• Duplicated effort, but business experts involved</td>
<td>• Some duplicate maintenance (eg. between EPM &amp; ERP systems)</td>
<td>• Centralized &amp; complex workflows lengthen close cycles</td>
<td>• Enterprise-wide alignment</td>
</tr>
<tr>
<td></td>
<td>• Duplicated effort</td>
<td>• Reporting inconsistencies &amp; reconciliation issues</td>
<td>• Local business rules enforced</td>
<td>• Automated Integration with major enterprise systems</td>
<td>• Intrinsic compliance</td>
</tr>
<tr>
<td></td>
<td>• Frequent reporting reconciliation issues</td>
<td>• Simple audit trails possible</td>
<td>• Compliance enforced by complex processes</td>
<td>• Full audit trails</td>
<td>• Fully devolved governance</td>
</tr>
<tr>
<td></td>
<td>• Responsibility for changes unclear</td>
<td></td>
<td></td>
<td>• Business rules enforced</td>
<td>• Full audit trails</td>
</tr>
<tr>
<td></td>
<td>• <em>Ad hoc</em> processes to support mergers</td>
<td></td>
<td></td>
<td>automatically</td>
<td></td>
</tr>
</tbody>
</table>
Dimension Management with Hyperion DRM

Unified source of the “truth”

- **Simplify:**
  - Simplify process & responsibilities

- **Align:**
  - Align dimensions across systems

- **Governance:**
  - Audit, versioning & change control

- **Risk mitigation:**
  - Consistent workflows reduce risk of financial mis-statement
“Scattered” Dimension Maintenance
Low maturity

Enterprise Applications

<table>
<thead>
<tr>
<th>GL</th>
<th>Sales</th>
<th>Consol</th>
<th>Reporting</th>
<th>Essbase</th>
<th>DW</th>
</tr>
</thead>
<tbody>
<tr>
<td>GL 1</td>
<td>CC 1</td>
<td>Prod</td>
<td>Org</td>
<td>CC 1</td>
<td>Prod</td>
</tr>
</tbody>
</table>

Scattered Dimension Maintenance
( Multiple, loosely-coordinated parallel processes & workflows )
“Governed” Dimension Maintenance
High maturity with Hyperion DRM

Enterprise Applications

GL | Sales | Consol | Reporting | Essbase | DW

CC | GL | Org | Entity | Time | Prod

Hyperion DRM
(Enterprise dimensions aligned – unified source of ‘truth’ – delegated governance)
Hyperion DRM for Dimension Management
Align critical dimensions

• DRM is a “best of breed” solution:
  – Mature product
  – Strong user base
  – Technology agnostic
  – Great tool for SAP customers!

• Automation of dimension alignment:
  – Reduce manual efforts and errors
  – Increase data quality
  – Complete audit trail & “roll back”

• Business value:
  – Process alignment and simplification
  – Simplify system rollouts & maintenance
Hyperion DRM for the Enterprise
Enhance value of enterprise dimensions

Hyperion DRM will help you:

1. Reduce risk of reporting mis-statement
2. Increase ease of regulatory compliance
3. Reduce maintenance costs for ERP, DW, EPM & BI
4. Increase effective data sharing across EPM & BI
DRM 11.1.2

Why is this release important?
Why is this Release Important?

DRM 11.1.2 (Talleyrand)

Enhanced architecture:

• Full featured, browser-based client
• Unicode support & internationalization
• 64-bit support
• Multiple DRM apps on a single server
• Enhanced, role-based security model
• Integration with Oracle Customer Hub 8.2
• Reusable external connections
Browser-Based Client

Key benefits

• Simplified client deployment, zero configuration:
  – Support for IE & for Firefox

• Common UI for authenticated & anonymous users:
  – Former Web Publishing Module is deprecated

• Streamlined UI:
  – All prior functionality available in web interface
  – Refocused to support most common tasks
  – Core DRM concepts unchanged
  – Minimal cross-training required
Browser-Based Client
Task-based, zero footprint

- Task-driven user interaction
- Quick search for nodes
- Simplified presentation of data
- Pagination of hierarchy nodes in tree
- Shortcuts to analysis and reporting tools
- Multi-node clipboard
- Easy access to lists of relationships
- Details for selected property
Browser-Based Client
Complete, browser-based UI

- Core DRM concepts are unchanged:
  - UI is enhanced
  - Minimal cross-training
  - Demo flows will remain familiar
- Extensive use of right-click options
- New features added:
  - Shortcuts to common tasks
  - Tabbed interface for multiple hierarchies
  - Customizable browser paging size
  - Multi-node clipboard

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Browser-Based Client

Easier access to DRM configuration

- Task-based UI for configuration:
  - Easier to find & select metadata
- Incomplete tasks remain as open tabs:
  - Switch between parallel tasks
  - Simplifies admin processes that require multiple steps (such as configuring node types)
- UI has improved but underlying concepts unchanged:
  - Example: “Automator” renamed as “Action Script”
Browser-Based Client

Benefits for the User

• Easy to get started
  – All you need to access Data Relationship Management is a web browser and a URL.

• Convenient to use
  – All Data Relationship Management tasks are performed in the same user interface.

• Easy to learn
  – Web Client simplifies the presentation of data and access to features for less technical users.

• Easy to Deploy
  – Minimizes the cost of ownership
  – Easily deploy Web Client to users
Internationalization
Focus on users’ locales

• Internationalization of text, floats, non-text (date/time…)
• Users can manage content in any language:
  – Dates, numbers, character sets formatted for users’ locales
• Reduces Admin effort to support languages and locales
• Unicode support can be different for each application
• Benefit for global companies, even if based in US

• Localization – later date:
  – UI localization in key languages, etc.
Enhanced, Role-Based Security

“Roles” replace prior user “types”

<table>
<thead>
<tr>
<th>Role</th>
<th>Browse</th>
<th>Request</th>
<th>Modify</th>
<th>Analyze</th>
<th>Bulk Update</th>
<th>Audit</th>
<th>Administer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anonymous User</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow User</td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interactive User</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Data Creator</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓ Versions and hiers created by user</td>
</tr>
<tr>
<td>Data Manager</td>
<td>✓</td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Master data and standard metadata</td>
</tr>
<tr>
<td>Access Manager</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td></td>
<td>Users and Authorization</td>
</tr>
<tr>
<td>App Administrator</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>System metadata</td>
</tr>
</tbody>
</table>

- More granular
- Allows authenticated or anonymous access:
  - Permits prior Web Publishing Module to be deprecated
  - Just a single environment to be maintained for all users
- Each DRM application can have separate users & roles
- Data governance and security management is separated from application administration
Multi-Application Support

- Multiple apps by business function
- Separate engines and services for each app
- Separate metadata and DB for each app

Common web access to all applications

- Multiple apps by technical purpose

LOB1 App | LOB2 App | Dev App | QA App
Multi-Application Support

Key benefits

• Simplified deployment of:
  – DEV / TEST / PROD environments
  – Unconnected, isolated DRM applications for different LOBs

• DRM meta-data & security encapsulated in each App:
  – No overlaps/collisions of metadata or security

• Applications can be reset & restarted independently:
  – Aids development & testing process for new Apps
  – Isolates parallel production processes on differing timelines

• User selects desired application at logon:
External Connections
Common connections to file systems and DBs

- User benefits:
  - Connections are driven by application server, not web client
  - Avoid manual upload & download of files through Web Client
  - Avoid redefinition of import/export connection information

- Administrator benefits:
  - Admins create external connections for users to share
  - Admins can restrict access to connections
  - Simplifies maintenance of connections to external resources
Oracle Customer Hub 8.2 Integration
"Customer Hub B2B Hierarchy Management Option"

- Expands Oracle Customer Hub (UCM) capabilities:
  - Embeds new DRM web client for managing account hierarchies

- Allows easy navigation and manipulation:
  - Drag-and-drop hierarchy manipulation
  - Hierarchy/version comparison, blending and merging
  - Source data and history (SDH) in UCM after each session
DRM 11.1.2 - DRM SP1 (mid 2010)

- Upgrade tools for data/metadata from 9.2 - 11.1.1
  - DB upgrade scripts will upgrade data/metadata
- Workflow integration:
  - WDK for 11.1.2
    - (Simple version of WDK will be available shortly after GA)
- EPM application templates upgraded for 11.1.2
- Improved performance for search & validations
- Improved date/time handling for properties
- Provisioning/authentication – OIM, OAM & OSSO
- Hyperlink properties
- Drag & drop enhancements (list to tree)
Demos in DRM 11.1.2

Be aware …

- Underlying concepts have not changed:
  - So ‘canned’ or custom demo flows will work as before
  - But access to some features is different (eg. transaction history)

- But some functionality is different:
  - Displaying & synchronizing multiple hierarchies is harder:
    - Only 2 hierarchies can be shown side-by-side
    - Must use the new “Visual Compare” – more steps to set up

- New features to leverage in demo:
  - Browser-based UI is very complete
  - Shortcut tab to common functions is a quick entry point
  - Node clipboard
Target Market for DRM 11.1.2
Offering the best solution...

• Target now:
  – New customers:
    • But wait for need SP1 (11.1.2.1) before deploying to PRD
    – Existing customers willing manually to migrate existing configurations:
      • Automated upgrade will not be available until SP1

• Caution existing customers:
  – New customers with aggressive implementation timescales initially should leverage 11.1.1
Browser-Based Client

Workshop session

• Lesson 1:
  – Launching DRM
• Lesson 2:
  – Navigating the New User Interface
How to fix authentication message in Firefox?

How to fix authentication message in Firefox?

- In Firefox type `about:config` in the addressbar
- Find the preference named `network.automatic-ntlm-auth.trusted-uris`
- Doubleclick and type `localhost`
- Enter and you're done
DRM 11.1.2

Roadmap Highlights
## DRM Roadmap

<table>
<thead>
<tr>
<th>Delivered</th>
<th>In Progress</th>
<th>In Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>2008</strong></td>
<td></td>
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</tr>
<tr>
<td>• Release 9.3.1</td>
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<tr>
<td>• Release 9.3.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Workflow Development Kit (WDK) 9.3.2</td>
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<tr>
<td><strong>2009</strong></td>
<td></td>
<td></td>
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<tr>
<td>• Release 11.1.1</td>
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<td>• Release 11.1.1.1</td>
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<tr>
<td>• Release 11.1.1.2</td>
<td></td>
<td></td>
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<tr>
<td>• WDK 11.1.1</td>
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<tr>
<td><strong>2010</strong></td>
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</tr>
<tr>
<td>• <em>New Functionality</em></td>
<td></td>
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</tr>
<tr>
<td>• Release 11.1.2</td>
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<tr>
<td>• WDK 11.1.2</td>
<td></td>
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<tr>
<td><strong>2011</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• <em>New Functionality</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Next Major Release</td>
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</tr>
<tr>
<td><strong>Maintenance</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Release 9.3.3</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Release 11.1.2.1</td>
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<td>• Release 11.1.1.4</td>
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</table>
# Data Relationship Management

<table>
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<tr>
<th>Talleyrand</th>
<th>Talleyrand SP1</th>
<th>Future</th>
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<td><strong>Enterprise Readiness</strong></td>
<td><strong>EPM Innovation</strong></td>
<td><strong>EPM Innovation</strong></td>
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<tr>
<td>° Full featured, browser-based user interface</td>
<td>° EPM Architect import source</td>
<td>° Essbase Studio integration</td>
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<td>° Internationalization for Unicode and locale support</td>
<td>° EPM application templates for 11.1.2</td>
<td>° Mapping integration with FDM</td>
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<td><strong>Market Leading Usability</strong></td>
<td><strong>ERP Integration</strong></td>
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<td>° Role-based user access</td>
<td>° Fusion Applications integration</td>
<td>° XBRL support for Disclosure Mgmt</td>
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<td>° Multiple applications</td>
<td>° Add node across versions</td>
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<td>° External connections</td>
<td>° Copy node properties across versions</td>
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<td>° Navigating large, flat hierarchies</td>
<td>° Improved duplicate node support</td>
<td>° ERPI extract for EBS, PSFT, and Fusion Apps</td>
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<td>° Validations in real-time and batch</td>
<td>° Hyperlink Properties</td>
<td>° Write back to EBS and PSFT</td>
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<td>° Version and hierarchy ownership</td>
<td>° Drag and drop enhancements</td>
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<td>° Add/Insert/Move as sibling</td>
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<td>° User metadata object access</td>
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<td>° Aliases, Attributes, and Maps</td>
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<td><strong>MDM Integration</strong></td>
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<td><strong>SOA Integration</strong></td>
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<td>° Enhanced WDK for BPEL 11g</td>
<td>° Common Lifecycle Management</td>
<td>° Iterative formula functions</td>
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</table>
EPMA Integration

- Dimension Import from DRM
- Deploy dimensions to multiple applications
- Share DRM hierarchies and properties across apps

Data Relationship Management

EPM Architect

EPM Applications

Deploy dimensions to multiple applications
FDM/ERPI Integration

- Export mapping tables
- Load facts into target app
- EPM Applications
- ERP Data Sources
- Import of CoA values and hierarchies
- Extract CoA values, hierarchies, and facts
- ERP Integrator
- Map source facts to target dimensions
- Data Relationship Management
- Financial Data Quality Management
Node Models

Node model can be assigned multiple node types

Combined properties and validations are applied to the node
Cross-References

![Diagram showing cross-references between Accounts, Entities, and Product]

- **Accounts**
  - A1000
  - A1100

- **Entities**
  - BU138
  - BU205

- **Product**
  - P2070
  - P2160

- **Links between nodes and cross-references**
  - Many-to-many relationship

- **Properties for each unique combination**
  - Status
    - Active
  - Status
    - Inactive
Roadmap Highlights
Late CY2010 and CY2011

Talleyrand release is foundational - will enable:

• Late CY2010:
  – ERPI / FDM mapping integration
  – Common user provisioning
  – Localization into key languages

• CY2011:
  – Complex, many-to-many cross referencing, with attribution
  – Items & subject areas
  – Web request and approve
  – Model-driven requests
  – BI/EPM integration
DRM 11.1.2

Pricing Model Overview
DRM Pricing Overview
Three license models, three pricing elements

• Three license models:
  1. Component pricing
  2. ULA
  3. Enterprise pricing (ELA)

• Three pricing elements:
  1. DRM “record” count
  2. Plus: Number of DRM Stewards
  3. Optional: Add-on, read-only access via ‘anonymous’ users:
     • Unlimited anonymous users
     • Unlimited read-only views
DRM Pricing Terminology
Records and stewards

• What is a DRM “record”?  
  – Each unique “business object” managed in DRM:  
    • Example: account, cost center, product, legal entity …  
    – Include (or estimate) summary/roll-up nodes  
    – Do NOT double-count archived, duplicate or shared members

• What is a DRM Steward?  
  – Users who manage content within DRM  
  – Users who administer DRM’s features  
  – Excludes users with only ‘anonymous’ access
What’s new with DRM 11.1.2?

2010: New Competitive Threats
DRM: Competitive Threats

2010

• **Oracle DRM is positioned as:**
  – Enterprise Dimension Management – all subject areas
  – Technology-agnostic, but growing integration with Oracle products

• **SAP MDGF:**
  – MDGF = “Master Data Governance for Finance”, so limited scope
  – Targeted at financial master data in SAP apps

• **Kalido:**
  – MDM for BI; weak audit capabilities & weak business rules

• **IBM Cognos Business Viewpoint:**
  – Limited customization options
  – Poor integration - targeted at hierarchy management for Cognos apps

• **Orchestra Networks:**
  – Strong competitor in EMEA
“Hyperion Data Relationship Manager is selling well; although this is not a core CPM application (it is an analytical MDM capability), it is an important enabling technology for CPM implementations in a heterogeneous environment”

Gartner CPM Magic Quadrant Report, 25 January 2010
Key Takeaways
Hyperion DRM 11.1.2

Enhanced Foundation
1. Full featured, browser-based client
2. 64-bit support
3. Multiple DRM applications on a single server
4. Enhanced, role-based security model
5. Internationalization
6. Integration with Oracle Customer hub 8.2
Reminders

– 11.1.2 Documentation
  • HTML online help is now available via the Help link in the DRM web client
  • All DRM product documentation is available on OTN under the Oracle EPM System
  • References and links on the DRM KIX Page
    https://kix.oraclecorp.com/KIX/display.php?labelId=6611&articleId=188565

– 11.1.2 Workflow Development Kit (April/May 2010)
  • To be available on the DRM OTN web page
More Information

EPM & BI GBU

- Gilles Demarquet (Paris)
- Robin Peel (Seattle)
- [http://my.oracle.com/epm](http://my.oracle.com/epm)
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