Unwinding the Mysteries of DRM

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Agenda

- Introduction
- Audience Participation
- Today’s Goals
- DRM Intro
- Favorite Quotes
- Getting More Value
- DRM & EPMA
- Integration outside of Hyperion
- What’s Coming
- Questions
Introduction

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Audience Participation

• How many people are comfortable with the idea of Master Data Management?

• How many people currently have DRM today?

• What Hyperion application types are you using it with?
  - Are you using it with EPMA?

• How many use it for something other than Hyperion?
Today’s Goals

• Dispel some favorite misconceptions
  o Mistakes companies make with DRM
  o Rumors about Oracle’s master plans

• What are some things people are using DRM for?
  o Data Governance?
  o New Hyperion Implementations?

• What other values can be exploited from DRM
Oracle’s MDM Vision

- DRM helps manage master data to alleviate data fragmentation
- Oracle breaks Master Data Management into Operational MDM and Analytic MDM
DRM is Oracle’s Analytical MDM solution

Diagram showing Operational MDM Apps and Analytical MDM Apps with categories like Party, Vendor, Product, Service, Locations, Financial, and Analytical.
What is DRM?

• DRM Allows a company to manage Master Data in Hierarchical Form
• DRM allows importing, blending and exporting of hierarchies
• DRM has versioning capabilities for hierarchies and Rollback functionality for Governance
• Prebuilt integrations with:
  • EBS
  • Fusion Financials
  • Fusion Accounting HUB
  • Hyperion EPMA
Obligatory DRM Screenshot
“But DRM to EBS isn’t real time”

SOURCE: Customer looking to implement Hyperion suite coming from only Hyperion Enterprise
“But DRM to EBS isn’t real time”

- What are you managing that needs to be real time?
  - Customers? Applicants? Vendors?
  - Most Financial meta data can be thought through and doesn’t need to be real time
    - If lack of “Real Time” is the problem with DRM than maybe software isn’t the real problem?
  - DRM is part of what Oracle calls “Analytical MDM”

- Data Governance module coming!
  - 11.1.2.3 – Stay Tuned for end of Presentation!
“We have DRM and Hyperion but it’s made our reporting and analysis harder”

SOURCE: Customer implemented Essbase for Reporting and took existing PeopleSoft directly into DRM with no modifications
“We have DRM and Hyperion but it’s made our reporting and analysis harder”

• What was the problem before DRM & Hyperion?
  o If your hierarchies are not representative of your business needs simply putting them in DRM won’t fix that!

• A DRM implementation is about Process more than it is about technical aspects
  o DRM Implementations should include hierarchy reviews, it is a great way to model hierarchies and keep versions of them
  o Involve many groups to determine what the necessary structures should look like
    o Who cares what they look like now?
“DRM doesn’t have a lot of value because I can’t see all of my metadata in one place”

SOURCE: Customer has multiple Hyperion Planning & Essbase applications but has two dimensions in DRM that feed Hyperion & Oracle EBS and rest of dimensions in disparate applications
“DRM doesn’t have a lot of value because I can’t see all of my metadata in one place”

- DRM can be flagged to feed different dimensions to different systems
  - No reason not to have all dimensions in DRM, in fact it’s better Governance
    - Customer had problems with different Planning applications having different standard dimensions (Year vs Years)
- DRM Should be source, using it halfway is going to lead to governance issues
  - Who owns what?
    - Big problem for some companies is the sensitive issue of who will own DRM and it’s associated hierarchies
“Why do I need DRM and EPMA?”

SOURCE: Customer with multiple Planning applications considering purchasing DRM and migrating to EPMA
“Why do I need DRM and EPMA?”

• You might not need both!
  o Classic administration is not going away – at least not yet!
    o Planning 11.1.2.3 has loads of additional classic administration functionality added to it
    o EPMA to Classic Essbase – use at your own risk.

• DRM can manage a lot more than just Hyperion, EPMA is Hyperion only
  o EPMA Data Synchronization is moving to FDM in 11.1.2.3

• DRM has more flexibility for different needs within a hierarchy than EPMA
  o EPMA struggles with dimension overrides in many applications other than HFM, DRM was built for that
“If I have DRM manage EBS than upgrading EBS will become too big a task.”

SOURCE: Customer going through EBS upgrade and considering implementing DRM
“If I have DRM manage EBS than upgrading EBS will become too big a task.”

• DRM doesn’t necessarily need to be upgraded when EBS does
  o DRM relies heavily on scripting for precisely this reason
    o Scripts may need to be slightly modified but it’s not a whole new integration

• DRM will actually make EBS upgrades easier
  o Model out new Charts of Accounts with DRM!
DRM – Help it Help you!

• Use Data Governance abilities
  o Prior to 11.1.2.3 you need to utilize the API
  o 11.1.2.3 release has Data Governance Module

• Do you have a Governance Process?
  o Putting in the technology is the easy part, deciding what the submit and approval process is the difficult piece

• Manage all your analytic dimensions in DRM
  o If that is too much work, at least get the Process correct around all of them.
DRM – Get More Value

• Use DRM to implement new Hyperion Applications FASTER!
  o Use DRM to model out meta data of new Hyperion Applications will give a jump start to Hyperion implementations
  o DRM has the versioning capability for hierarchies that new implementations need!
  o If you are using DRM the process to update your applications needs to be built anyway

• Modeling Re-organizations is easier with DRM
  o The blender and the versioning should all companies to spin off new hierarchies that can model org changes very easily

• Chart of Accounts Projects
  o DRM should allow for Chart of Accounts redesign projects to be much faster than previously because changes are faster and versioning is easier
## DRM & EPMA

<table>
<thead>
<tr>
<th>DRM</th>
<th>EPMA</th>
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</thead>
<tbody>
<tr>
<td>• Manage Multiple Systems</td>
<td>• Manage Only Hyperion Applications</td>
</tr>
<tr>
<td>• Hierarchy Versioning</td>
<td>• No Hierarchy Versioning</td>
</tr>
<tr>
<td>• Hierarchy overrides more flexible than EPMA</td>
<td>• Data Synchronization between Hyperion Applications</td>
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<tr>
<td>• Integration is with Scripting</td>
<td>• Integration efficiency different with different Hyperion Apps</td>
</tr>
<tr>
<td>• No Data Capabilities</td>
<td>• Stability issues with Essbase</td>
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<tr>
<td>• Data Governance API</td>
<td>• Dimension overrides not very flexible</td>
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<tr>
<td>• Out of the Box integration with EPMA</td>
<td>• More built in Hyperion “knowledge” out of the box</td>
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Data Relationship Governance (What “might” be coming … ;)

- Key Concepts & Functionality
  - Workflow Models
  - Requests & Request Items
  - Governance Work List
  - Alerts & Notifications
  - Process Automation & Control
  - Business Rule and Policy Enforcement

- Define Governance Requirements
- Organize Stakeholders by Role
- Design Governance Process
- Policies & Rules Build Trust
- Deploy and Govern Master Data

Master Data Governance
The Bottom Line!

- Process – Process - Process
  - DRM Implementation is only as strong as the process around it
  - This is not an Administrator’s toy!
- DRM is Oracle’s Analytic Master Data Management tool
  - Use it to model analytic hierarchy needs
- Manage everything you need it to inside of DRM
  - Managing some dimensions in DRM and others outside is not a good answer
- DRM does not necessarily need EPMA
  - Classic Administration is not going away
  - Look at 11.1.2.3
Questions?

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• DRM should enable better governance around Meta Data!
  o Companies still need to put in place a governance process
  o Just because you have some hierarchies in DRM doesn’t mean you’ve solved the problem

• One or Two Hierarchies in DRM but not the rest
  o Why? – Often to politically challenging to put all hierarchies
    o Put all Hyperion hierarchies in
BI Publisher - Integration

- BI Publisher is all XML
- XML is now a standard
  - Even XBRL is founded on XML principles
- Oracle Foundation – development & future roadmap
- New software will use XML standard