



# Unwinding the Mysteries of DRM

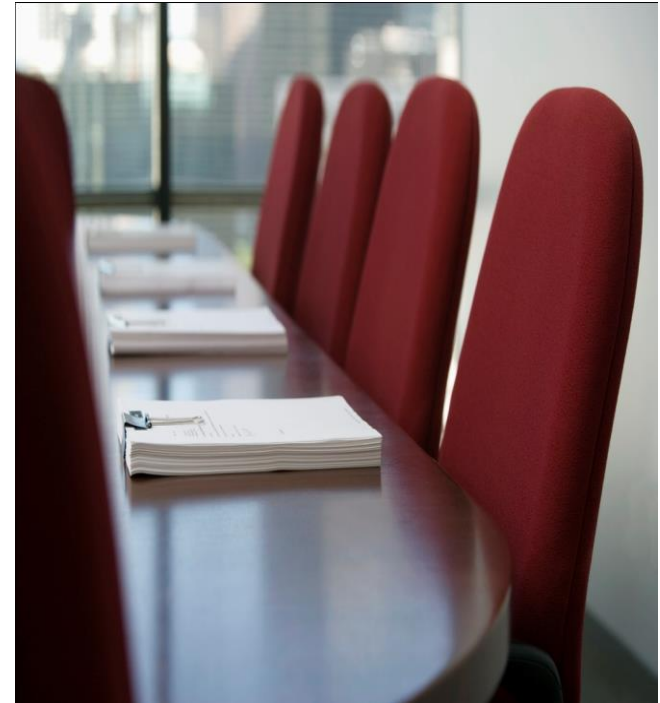


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ANALYTICS

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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



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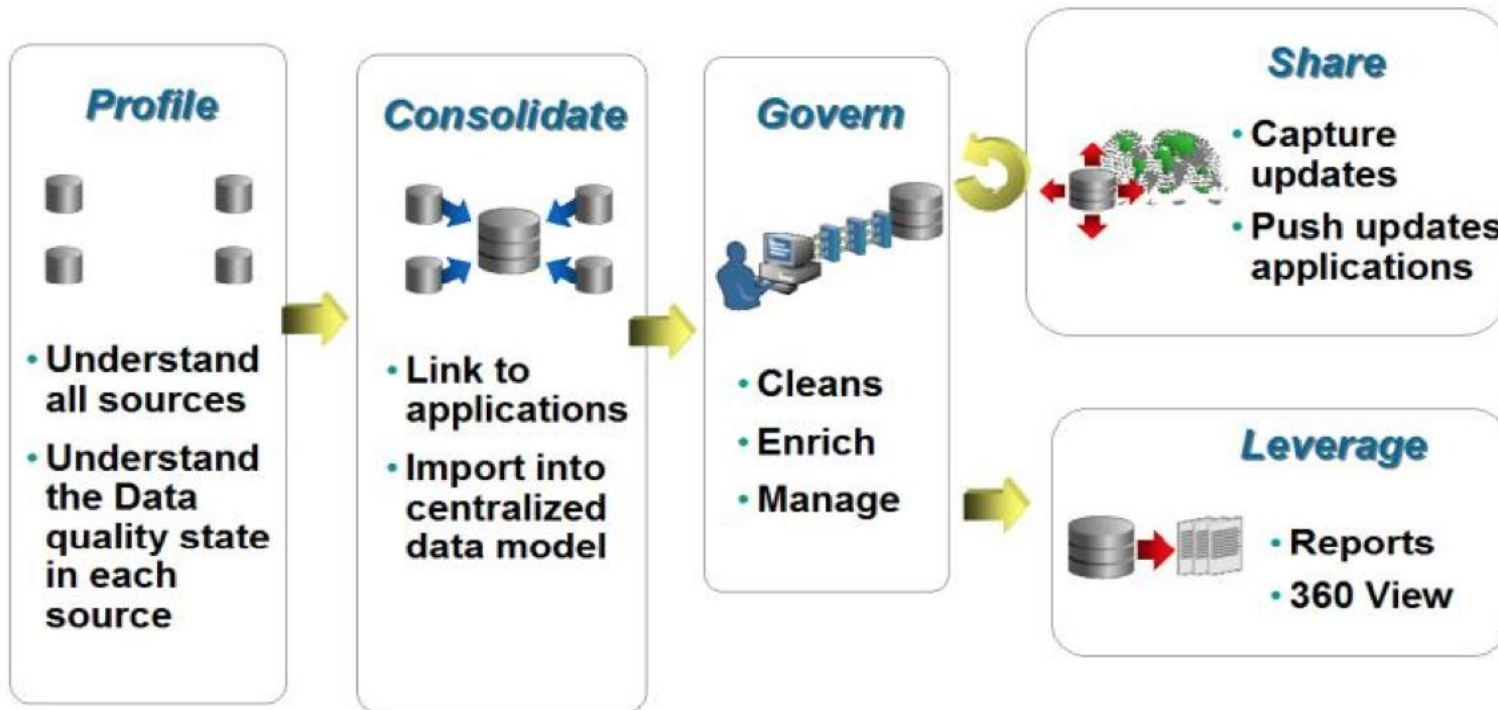
# Audience Participation

- 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

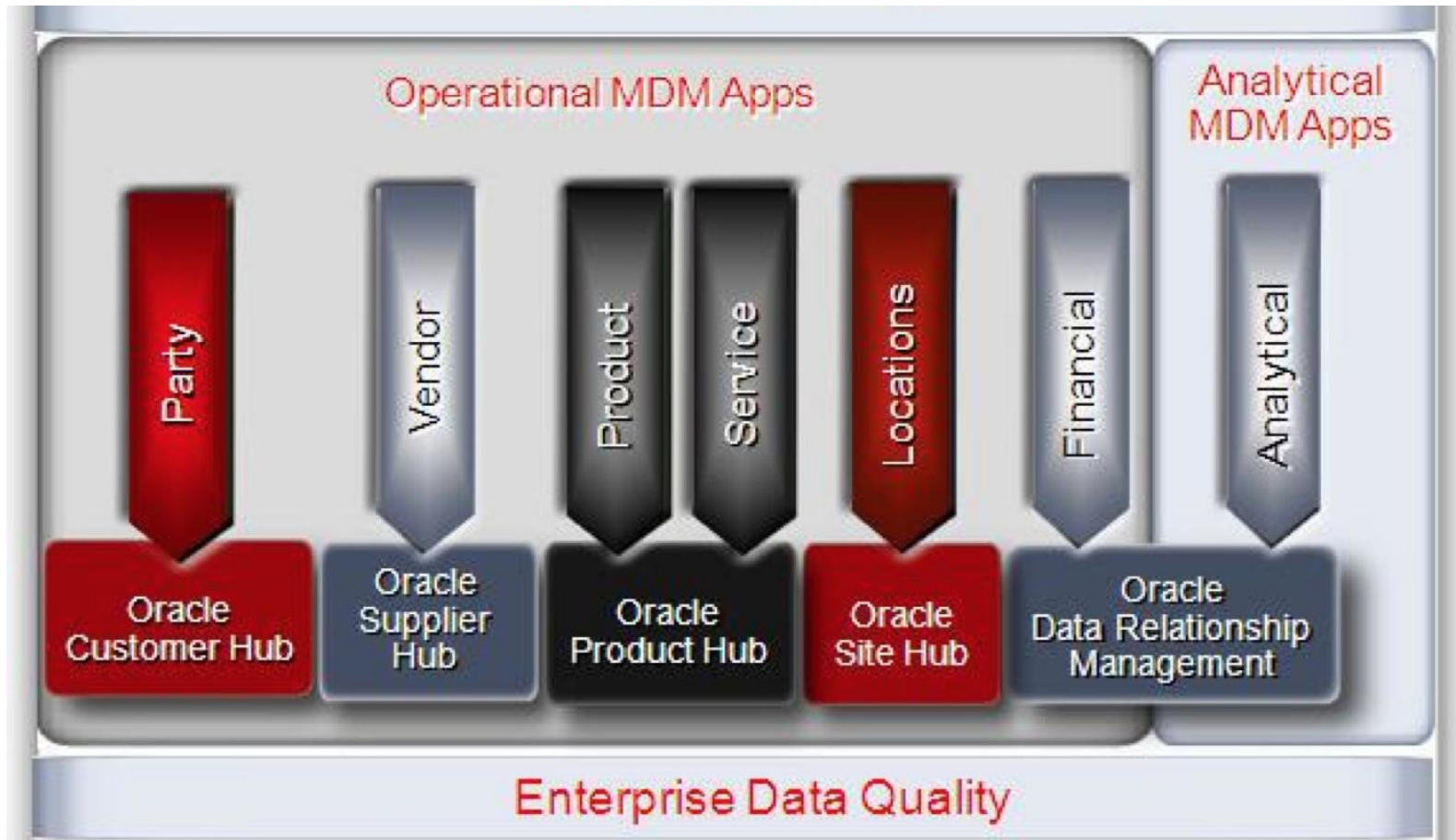
- Dispel some favorite misconceptions
  - Mistakes companies make with DRM
  - Rumors about Oracle's master plans
- What are some things people are using DRM for?
  - Data Governance?
  - New Hyperion Implementations?
- What other values can be exploited from DRM

# 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

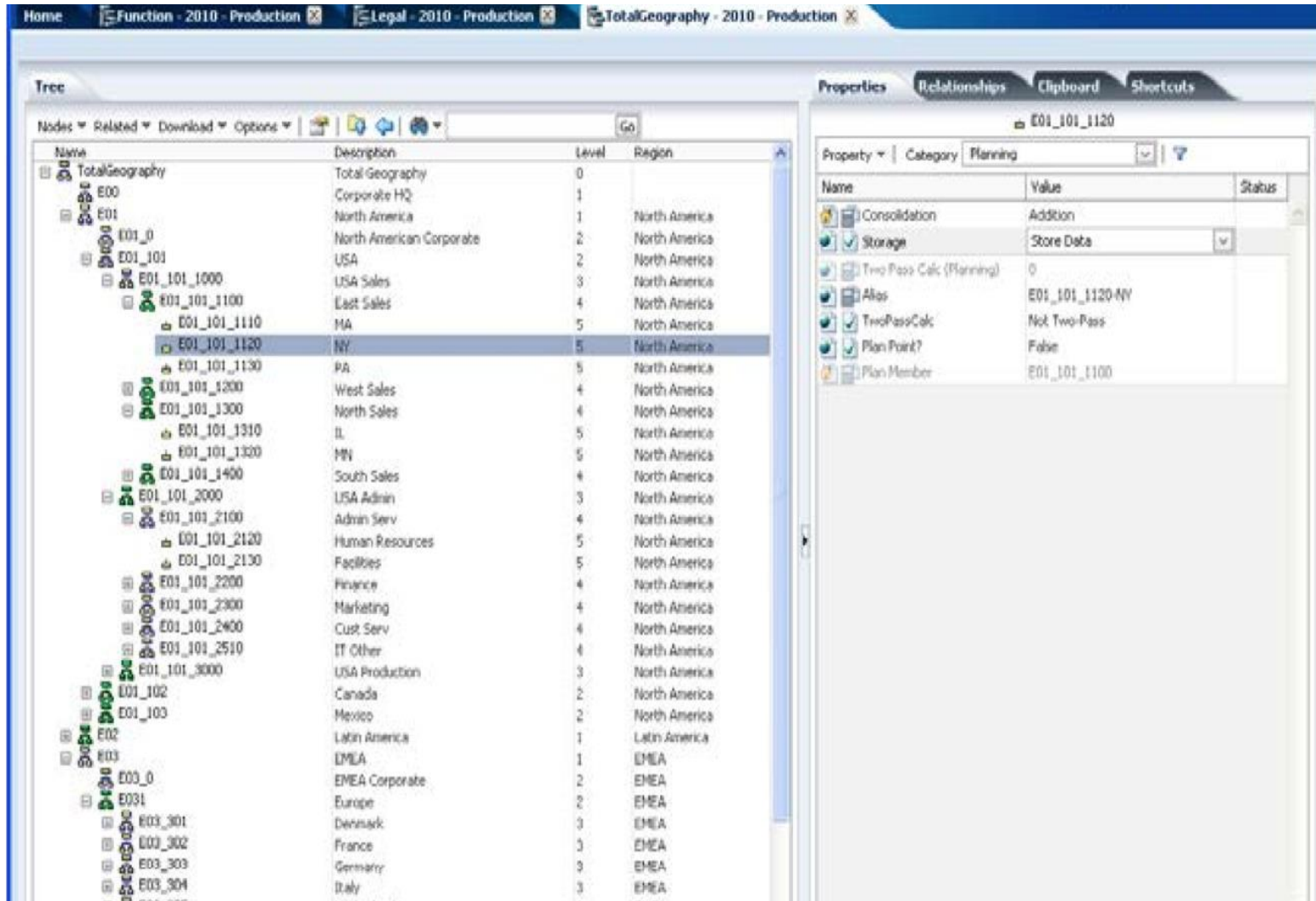


# What is DRM?

- 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



The screenshot displays a software interface with a hierarchical tree on the left and a properties panel on the right. The tree shows a hierarchy of organizational units, with the selected unit being E01\_101\_1120 (NY). The properties panel shows various settings for this unit, including Consolidation (Addition), Storage (Store Data), Two Pass Calc (Planning) (0), Alias (E01\_101\_1120-NY), TwoPassCalc (Not Two-Pass), Plan Point? (False), and Plan Member (E01\_101\_1100).

Name	Description	Level	Region
TotalGeography	Total Geography	0	
E00	Corporate HQ	1	
E01	North America	1	North America
E01_0	North American Corporate	2	North America
E01_101	USA	2	North America
E01_101_1000	USA Sales	3	North America
E01_101_1100	East Sales	4	North America
E01_101_1110	MA	5	North America
E01_101_1120	NY	5	North America
E01_101_1130	PA	5	North America
E01_101_1200	West Sales	4	North America
E01_101_1300	North Sales	4	North America
E01_101_1310	IL	5	North America
E01_101_1320	MI	5	North America
E01_101_1400	South Sales	4	North America
E01_101_2000	USA Admin	3	North America
E01_101_2100	Admin Serv	4	North America
E01_101_2120	Human Resources	5	North America
E01_101_2130	Facilities	5	North America
E01_101_2200	Finance	4	North America
E01_101_2300	Marketing	4	North America
E01_101_2400	Cust Serv	4	North America
E01_101_2510	IT Other	4	North America
E01_101_3000	USA Production	3	North America
E01_102	Canada	2	North America
E01_103	Mexico	2	North America
E02	Latin America	1	Latin America
E03	EMEA	1	EMEA
E03_0	EMEA Corporate	2	EMEA
E031	Europe	2	EMEA
E03_301	Denmark	3	EMEA
E03_302	France	3	EMEA
E03_303	Germany	3	EMEA
E03_304	Italy	3	EMEA

Property	Value	Status
Consolidation	Addition	
Storage	Store Data	
Two Pass Calc (Planning)	0	
Alias	E01_101_1120-NY	
TwoPassCalc	Not Two-Pass	
Plan Point?	False	
Plan Member	E01_101_1100	

“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?
  - 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
  - DRM Implementations should include hierarchy reviews, it is a great way to model hierarchies and keep versions of them
  - Involve many groups to determine what the necessary structures should look like
    - 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!
  - Classic administration is not going away – at least not yet!
    - Planning 11.1.2.3 has loads of additional classic administration functionality added to it
    - EPMA to Classic Essbase – use at your own risk.
- DRM can manage a lot more than just Hyperion, EPMA is Hyperion only
  - EPMA Data Synchronization is moving to FDM in 11.1.2.3
- DRM has more flexibility for different needs within a hierarchy than EPMA
  - 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
  - DRM relies heavily on scripting for precisely this reason
    - Scripts may need to be slightly modified but it's not a whole new integration
- DRM will actually make EBS upgrades easier
  - Model out new Charts of Accounts with DRM!

# DRM – Help it Help you!

- Use Data Governance abilities
  - Prior to 11.1.2.3 you need to utilize the API
  - 11.1.2.3 release has Data Governance Module
- Do you have a Governance Process?
  - 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
  - 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!
  - Use DRM to model out meta data of new Hyperion Applications will give a jump start to Hyperion implementations
    - DRM has the versioning capability for hierarchies that new implementations need!
    - If you are using DRM the process to update your applications needs to be built anyway
- Modeling Re-organizations is easier with DRM
  - The blender and the versioning should all companies to spin off new hierarchies that can model org changes very easily
- Chart of Accounts Projects
  - DRM should allow for Chart of Accounts redesign projects to be much faster than previously because changes are faster and versioning is easier

## DRM

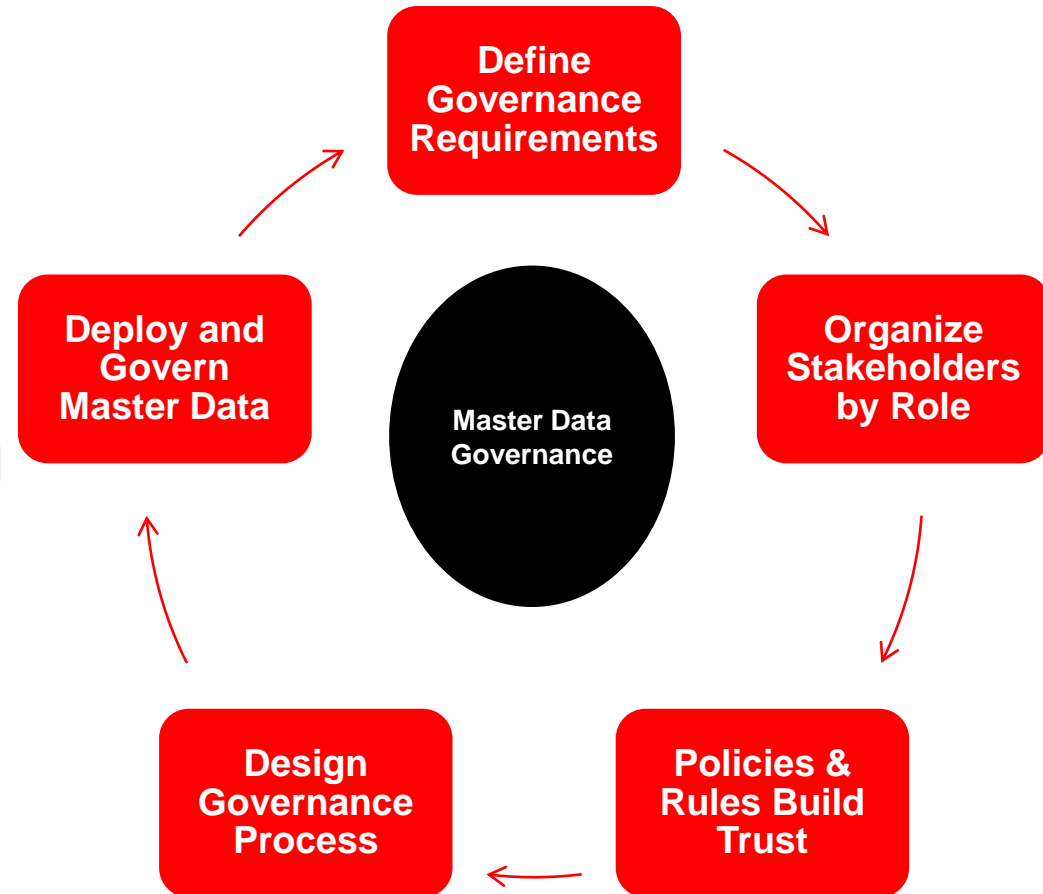
- Manage Multiple Systems
- Hierarchy Versioning
- Hierarchy overrides more flexible than EPMA
- Integration is with Scripting
- No Data Capabilities
- Data Governance API
- Out of the Box integration with EPMA

## EPMA

- Manage Only Hyperion Applications
- No Hierarchy Versioning
- Data Synchronization between Hyperion Applications
- Integration efficiency different with different Hyperion Apps
- Stability issues with Essbase
- Dimension overrides not very flexible
- More built in Hyperion “knowledge” out of the box

# 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

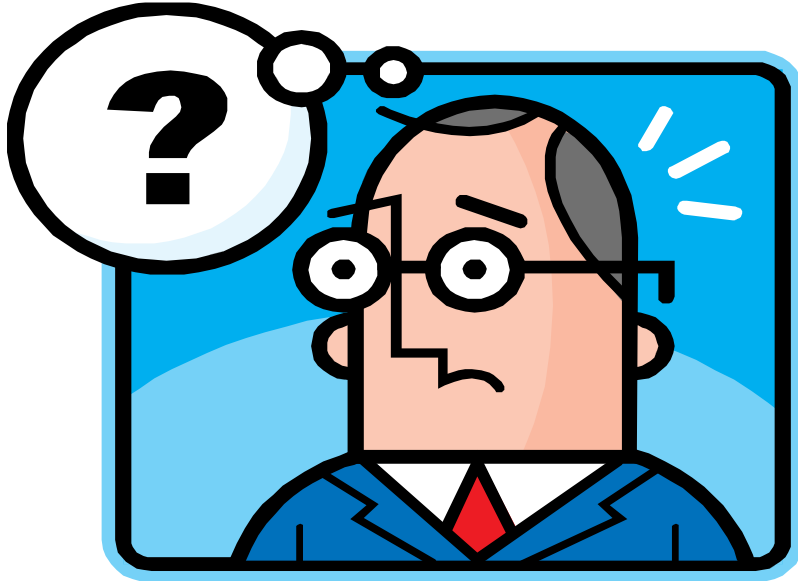


# The Bottom Line!

- **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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# Process – Process – Process!!!

- DRM should enable better governance around Meta Data!
  - Companies still need to put in place a governance process
  - 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
  - Why? – Often to politically challenging to put all hierarchies
    - 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



## Delivery

- Delivery Configuration
- Printer
- Fax
- Email
- WebDAV
- HTTP
- FTP
- CUPS Server