



ORACLE® HYPERION DATA RELATIONSHIP MANAGEMENT

Release 11.1.2.2

NEW FEATURES

ORACLE®
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

CONTENTS IN BRIEF

Data Relationship Management 11.1.2.2 New Features	2
Data Relationship Management 11.1.2.1 New Features	6
Data Relationship Management 11.1.2 New Features	8

Data Relationship Management 11.1.2.2 New Features

Performance Management Architect Integration

Oracle Hyperion EPM Architect can import hierarchies, nodes, and properties directly from Oracle Hyperion Data Relationship Management for use by EPM applications. The dimensions imported into Performance Management Architect can then be shared with and deployed to these EPM application types:

- Oracle Hyperion Financial Management
- Oracle Hyperion Planning
- Oracle Essbase

An application template is loaded into a source Data Relationship Management application to auto-configure it for managing and exporting dimensions for Oracle Hyperion EPM Architect. The application template may be optionally customized to support the specific business requirements of different organizations.

For more information, see the *Oracle Hyperion Data Relationship Management EPM Architect Integration Guide*.

Version Variables

Data Creator, Data Manager, and Application Administrator role users can utilize variables to refer to versions in a Data Relationship Management application. Version variables may be used to dynamically refer to different versions over time or provide an easy method of selecting a version from a large list of versions. Version variables can be saved with user metadata objects such as queries, compares, imports, blenders, and exports. In all areas of Data Relationship Management, a version variable may be used in the same manner as a version name. The previously available DefaultCurrentVersion and DefaultPreviousVersion system preferences are now accessible as version variables.

Version Backup and Restore

Data Manager role users can archive or migrate data from one Data Relationship Management application to another using version backup and restore. You can include one or more versions in a binary backup file that is written to an external connection defined by an administrator. The backup file may be later restored into the same or a different application. The Batch Client also supports version backup and restore for automation purposes.

Hierarchy Group Properties

Application Administrators can create hierarchy group properties to enable users to group hierarchies in multiple ways based on different contexts. A hierarchy can be assigned to different groups for different properties but can only be associated to a single group per property. The Hierarchy Tree toolbar has a new drop-down list called Group By for selecting a hierarchy group property. Only the hierarchy group properties that the user has access to are available in the Group By drop-down list.

Domain Membership for Nodes

Domains are available to preserve integrity and ensure consistency of node names and descriptive properties across multiple versions for nodes of a common type. Domains are created by administrators and associated with versions by Data Manager role users or version owners. Nodes may be assigned to a domain in a particular version at the time of creation or later using the Domain Membership feature. Nodes that are members of a domain cannot be renamed. Domains may be optionally configured to use a prefix or suffix to qualify node names as well as restricting the deletion of nodes or changing their limb/leaf designation. Import processes can handle the qualification of domain node names as nodes are being created in a version and blending processes allow the assignment of a node to a domain as nodes are copied to a target version.

Copying Nodes and Properties Across Versions

You can copy nodes from one version to another. The Put Node and Insert Node features let you select a node from a version other than the current version. On Compare result page you can drag and drop a node from one version to a different version. For each scenario where a node is being copied across versions, you have the option of copying properties and descendant nodes from the source to the target version. You can also copy node properties across versions from one node to another node.

Navigation to Hierarchy and Node via URL

You can directly access a hierarchy or local node in the Data Relationship Management Web Client from an external document or program using a context-sensitive URL. The URL is accessible as a system property for a hierarchy or local node for easy reference and copy-paste to another application. If Single Sign On (SSO) or anonymous access is enabled, the user will directly navigate to the version, hierarchy, and node with which the URL is associated. If not enabled, the user is directed to the login page and upon successful log in, is navigated to the hierarchy or node.

Hyperlink Enabled Properties

A new Hyperlink property data type is available to manage URLs which refer to Web resources. The URLs display as navigable hyperlinks in the Data Relationship Management Web Client.

The Memo and FormattedMemo data types can also support hyperlinks embedded in regular text. All of these property data types support the option of defining a label for each URL to improve on-screen display of complicated or lengthy URLs.

Batch Validations for Export

Assigned or selected batch validations can be run prior to executing a Data Relationship Management data export. This feature ensures that the data adheres to the appropriate business rules before further distribution. When the validation option is selected and the associated data fails to pass the specified validation, the export process is stopped. The following export types support this feature:

- Hierarchy Export
- Hierarchy XML Export
- Generation Export
- Version Export
- Compare Export
- EPM Architect Export (new in this release)

Record ID for Exports

When exporting to a database table, a record number is auto-generated for each record being output to preserve the order of the records as they are exported. The following export types support this feature:

- Hierarchy Export
- Version Export
- Compare Export

Formula Based Validations and New Formula Functions

A new Formula validation class may be used to enforce business rules that require complex logic which can be expressed in a Data Relationship Management formula. This validation class bypasses the need for a derived property definition to be created which may greatly reduce the complexity of an application configuration. New formula functions are also available to perform advanced calculations for derived properties and validations.

The new formula functions are listed below. See the *Oracle Hyperion Data Relationship Management Administrator's Guide* for more information on these functions.

- AvgList
- HasCharacters
- InRange
- IsAlphaNumeric

- IsBlank
- IsDataType
- ListDistinct
- ListNodePropValues
- ListNodesWith
- ListRelatedNodesWith
- MaxList
- MinList
- SortList
- SumList
- IsNodeAbove
- IsNodeBelow
- IsBottomNode
- IsDefinedPropVal
- InheritedPropOrigin

Property Type Modification for Saved Property Definitions

You can change the property type for an existing property definition to improve customization of properties loaded from application templates and to preserve any relationships to other metadata objects which depend on the property to function properly. The primary consideration when changing the property type is if the property is being changed from one that can store data to one that cannot (defined to derived or lookup). In this situation, the user is warned that data will be lost and must confirm the change.

User Interface Localization

Data Relationship Management user interface components are available in non-English languages to support globalization requirements for international organizations. The following languages are supported:

- French
- German
- Japanese
- Korean
- Simplified Chinese

Expanded Character Encodings

A limited set of non-Unicode multi-byte character sets are supported for text files used for action scripts, import sources, and export targets to accommodate legacy systems that are not Unicode compliant.

Data Relationship Management 11.1.2.1 New Features

Chart of Accounts Management for General Ledger

Data Relationship Management can be used to manage chart of accounts segment values, their properties, and hierarchies for independent value sets in Oracle E-Business Suite General Ledger or Oracle Fusion Accounting Hub. Segment values can be created, organized into hierarchies, and marked for distribution in Data Relationship Management. This chart of accounts information can be distributed to one or multiple Oracle General Ledger instances. Segment values and hierarchies are retrieved from Data Relationship Management and loaded using a concurrent request program. For more information, refer to the *Oracle Hyperion Data Relationship Management Oracle General Ledger Integration Guide*.

Namespaces for System Metadata

Namespaces are used in the names of property definitions, validations, and node access groups to distinguish metadata objects with similar names and to prevent naming conflicts when application templates are loaded into the same Data Relationship Management application. These metadata object types are organized by namespace for user selection and administration purposes within the web client. Labels can now be duplicated for convenience purposes, whereas previously they had to be unique. Tasks such as action scripts may require a fully qualified object name if the label of a referenced object cannot be resolved to a unique name. The following namespace considerations apply to property definitions, validations, and node access groups:

- The fully qualified name of an object includes its namespace and uses dot notation to delimit the namespace from the name of the object.
- System-defined objects always use the Core namespace.
- User-defined objects always use the Custom namespace.
- Properties that are generated by the system for assigning validations are created with the Val namespace.
- Properties that are generated by the system for assigning node access groups are created with the namespaces Nag.Limb and Nag.Leaf.
- Properties, validations, and node access groups are displayed by label in the property editor, with the ability to separately view the namespace.

- Objects are displayed by label and namespace in other areas of the web client where selection from a list is required.

Enhanced Change Tracking for Nodes

With the 11.1.2.1 release, change tracking functionality for nodes is now always enabled and is no longer controlled by system preferences. Several enhancements improve change tracking for nodes in Data Relationship Management:

- New property definitions labeled Added On, Added By, Last Changed On, Last Changed By, and Node Changed are now available in the Stats property category. These core properties replace the custom properties that were referred to by system preferences to enable change tracking functionality in previous releases.
- DateTime, a new data type for properties, is available and is used by the NodeAddedOn and NodeLastChangedOn change tracking properties. The DateTime data type combines the functionality of the Date data type and the Time data type, which remain and are not otherwise affected. The format in which DateTime data type property values are displayed is controlled by the regional settings of each user's session.
- The formula functions AddedOn, AddedBy, ChangedOn, and ChangedBy are mapped to the new properties. A new formula function labeled Changed is mapped to the new Node Changed property.

Metadata Impact Analysis During Deletion

Data Relationship Management can now identify forward dependencies with an object that was selected for deletion during metadata administration. This capability enables users to preview which other objects would be negatively affected as a result of the deletion and enables cancellation of the deletion operation.

Immediate Effect for System Preferences

Administrators can now modify a selected set of system preferences for a Data Relationship Management application that will take immediate effect once saved. This immediate effect capability is particularly beneficial for frequently changed system preferences such as Default Current Version and Default Previous Version, which you can now set using the **Make Default** menu option available while managing versions.

Single Sign-On

In this release, Data Relationship Management supports single sign-on using Oracle Access Manager. Single sign-on is available through the Data Relationship Management web client. For more information on enabling single sign-on, see the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

Web Client Load Balancing Using Oracle HTTP Server

You can use Oracle HTTP Server to load balance Data Relationship Management IIS Web applications. For more information, see the *Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide*.

Unless otherwise indicated, you can find more information on the new features outlined in this guide in the *Oracle Hyperion Data Relationship Management User's Guide* and the *Oracle Hyperion Data Relationship Management Administrator's Guide*.

Web Service API Standardization

The Data Relationship Management web service API was enhanced to conform to Oracle Fusion Middleware web service standards, including:

- URLs, namespaces, and types
- Method signatures
- Policy management and message protection are now available using Oracle Web Services Manager

Detailed information about the web service API is available in the *Oracle Hyperion Data Relationship Management Web Service API Reference*. For more information on the Data Relationship Management API, see the *Oracle Hyperion Data Relationship Management Application Programming Interface Guide*.

Data Relationship Management 11.1.2 New Features

EPM System

- With this release, many Oracle Enterprise Performance Management System products support hostnames that resolve to IPv6 addresses. See the *Oracle Hyperion Enterprise Performance Management System Certification Matrix*. IPv4 support (both hostname and IP address) remains unchanged from earlier releases.
- Oracle Enterprise Performance Management System supports the following types of SSL configurations:
 - Full SSL Deployment (including data access)
 - SSL Terminating at the Web Server
 - SSL Accelerators (Off-loading)
 - Two-way SSL

For more information on the SSL configurations, see the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

Full-featured Web Client

A new Web client provides access to the complete feature set of a Data Relationship Management application through a Web browser. It combines the functionality previously available in the Windows client and the Web Publishing client in a single user interface. Presentation of data and access to features is simplified, improving ease of use.

The Web client provides two types of access:

- Authenticated users have personalized service based on their roles and granular security
- Anonymous users can access public views of data via a URL for easy reference

Online help is now available from the Data Relationship Management user interface.

➤ To access online help:

- 1 Log onto Data Relationship Management.
- 2 From the Help menu, select Contents, then choose User's Help or Administrator's Help.

Role-based Security

User roles enable control of high-level access to data and Data Relationship Management features. Several system-defined roles are available, enabling permissions to be assigned at a granular level to allow users to perform higher-level functions without giving them complete higher-level access. Security administration is now segregated from metadata administration to align with corporate policies that require this level of separation of duties.

The following system-defined roles are available:

- Anonymous User
- Workflow User
- Interactive User
- Data Creator
- Data Manager
- Access Manager
- Application Administrator

External Connections

Administrators can set up common connections to file systems and databases that can be shared by all users. Imports and exports run on the application server and directly access external connections instead of requiring a manual upload/download by a user. Administrators are also able to restrict certain connections to only profiles used for system integration purposes. Centralized maintenance of external connections helps minimize maintenance of connectivity to network resources, particularly for migration scenarios across environments.

Improved User Experience

Many existing features have been enhanced to provide a more informative and streamlined user experience. The improvements for each product function are:

Browsing and Searching Data

- View multiple properties as columns in a tree
- Show or hide inactive nodes in a hierarchy
- Identify shared nodes using icons
- Configure the number of nodes to be displayed in a tree on each page
- Use the pager to navigate through node pages
- Search for specific descendant nodes under a hierarchy node
- Find a node in the Node Selector dialog box
- Download trees and grids to an external file format such as PDF, RTF, or XLS

Managing Data

- Create your own versions and hierarchies using the Data Creator role
- Define new hierarchy groups during hierarchy creation
- Assign controlled properties after hierarchy creation
- Add or insert a node as a sibling
- Add multiple nodes to the clipboard at the same time by using the Take option
- Insert or move nodes from different parents at the same time by using the Put option
- Copy and paste properties from the clipboard
- Order children by using drag-and-drop functionality
- View and edit properties directly from node lists such as find, query, compare, or validation results.

Validations

- Create validations to run in real time, batch, or both modes
- Define the validation mode at the time of assignment to data
- View validation reasons for multiple nodes at the same time
- Copy nodes from validation results to the clipboard

Queries and Compares

- Work with multiple queries and compares at the same time
- Define return properties during query or compare creation
- Run queries or compares for selected nodes by using shortcuts
- Copy nodes from results to the clipboard

- Restrict access to queries and compares used for system purposes

Scripts

- Select a character encoding for a source file
- Edit action parameters in loaded scripts
- Download loaded scripts to additional external file formats such as PDF, RTF, or XLS

Imports, Blenders, and Exports

- Work with multiple objects at the same time
- Import from or export to network resources by using external connections
- Select a character encoding for an import or export file
- Download import and blender results to an external file format such as PDF, RTF, or XLS
- Restrict access to imports, blenders, and exports used for system purposes

Audits

- View From and To details for administrator transactions side by side
- Download transactions or requests to external file formats such as PDF, RTF, or XLS

The following rules apply for querying transactions:

- Interactive Users can query only their own transactions
- Data Creator or Manager users can query all data transactions
- Access Manager or App Administrator users can query system transactions

The following rules apply for request queries:

- Users can query only requests that they own
- Data Manager users can query all requests

Administration

- Browse and select administrative tasks from a tree
- Work on multiple objects at the same time
- Define function parameters before you insert functions into formulas
- Provide glyphs in PNG format

Internationalization

Data Relationship Management provides Unicode support for user-defined metadata and data. Unicode support allows the use of multi-byte character sets to handle multiple languages at the same time. Internationalization of date and float data types based on a user's locale is also included.

Multiple Applications Per Server

Separate Data Relationship Management applications can be configured and run on the same server to enable customers to physically segregate and independently manage different instances without requiring additional hardware or virtualization software. Different business groups are able administer the metadata and data within their own applications without any impact to any other application. The Data Relationship Management Console is now used to create and manage all applications for a single installation.

Enhanced Service-Oriented Architecture Integration

A coarse-grained Java web service for Data Relationship Management provides easier interoperability with other Oracle Middleware and third-party Service-Oriented Architecture (SOA) applications. API methods are now stateless and include operations that perform a combined set of actions on the server. Asynchronous operations such as imports and exports that use saved profiles can be executed using a small set of runtime parameters instead of requiring the entire profile to be supplied. Security improvements have also been incorporated to comply with web service standards.

64-Bit Support

64-bit support is available for the web and application servers for Data Relationship Management. This includes certification for 64-bit Windows operating systems as well as increased memory addressability for Oracle Hyperion Data Relationship Management engines on the application server.

For more information on these new features, see the *Oracle Hyperion Data Relationship Management User's Guide* and the *Oracle Hyperion Data Relationship Management Administrator's Guide*.

COPYRIGHT NOTICE

Data Relationship Management New Features, 11.1.2.2

Copyright © 2000, 2012, Oracle and/or its affiliates. All rights reserved.

Authors: EPM Information Development Team

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS:

Programs, software, databases, and related documentation and technical data delivered to U.S. Government customers are "commercial computer software" or "commercial technical data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, duplication, disclosure, modification, and adaptation shall be subject to the restrictions and license terms set forth in the applicable Government contract, and, to the extent applicable by the terms of the Government contract, the additional rights set forth in FAR 52.227-19, Commercial Computer Software License (December 2007). Oracle America, Inc., 500 Oracle Parkway, Redwood City, CA 94065.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

This software or hardware and documentation may provide access to or information on content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.