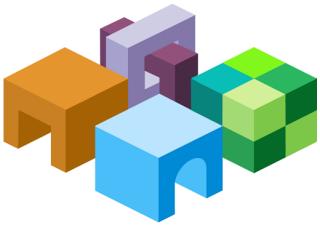

ORACLE® DATA RELATIONSHIP MANAGEMENT SUITE

Release 11.1.2.4

New Features

ORACLE

Contents In Brief

Release 11.1.2.4.340 New Features

Subtopics

Common User Provisioning

Oracle Data Relationship Management supports the provisioning of users and groups in external user directories such as LDAP and Microsoft Active Directory using Oracle Hyperion Shared Services. Users and groups defined in these directories can be provisioned with user roles to Data Relationship Management applications registered with Shared Services. Provisioned user groups in Shared Services can be mapped to node access groups and property categories to automatically manage user membership. Common user provisioning is optionally available for Data Relationship Management applications using Oracle Hyperion Shared Services for external user authentication.

Integration with Financial Data Quality Management

A packaged integration with Oracle Hyperion Financial Data Quality Management, Enterprise Edition is available to use Data Relationship Management to manage dimension member mappings between ERP source systems and EPM target applications supported by Oracle Hyperion Financial Data Quality Management, Enterprise Edition. Refer to the *Oracle Data Relationship Management Enterprise Performance Management Integration Guide* for more information on setup and usage of this integration.

Hyperlinks in Workflow Instructions

Workflow model descriptions and workflow task instructions permit the use of custom hyperlinks to related web resources to guide users participating in a Data Relationship Governance request. Governance users can view these links on the Request page of the Web Client and navigate to the target Web resources as directed.

Enhanced Find for Implicit Shared Nodes

The Find feature available on the Browse Hierarchy page of the Web Client provides an option to include Implicit Shared Nodes as part of the find results. This option may be used to find all instances of a node in a hierarchy using shared nodes.

Exclude Shared Nodes for Unique Property Validations

Shared nodes may be excluded from validations using the unique property validation classes UniqueProp, VersionUniqueProp, and VersionUnique2Prop. A configurable option is available for validations using those classes.

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Subtopics

Data Relationship Management Analytics

The Oracle Data Relationship Management Analytics module provides dashboards and reports to track changes in master data, analyze request metrics, monitor user assignments and activity, and analyze metadata object usage. Analytics users and managers can drill through multiple layers of detail, including the ability to drill from Oracle Data Relationship Management Analytics into governance requests in Data Relationship Management.

Change Management Dashboard

Provides aggregated views of changes that have occurred in the Data Relationship Management system over time. Metrics in this dashboard are based on committed requests and all interactive changes. This dashboard includes change actions such as adds, updates, moves, and deletes across node and property changes to lend change perspectives by hierarchy, node type, property category, and so on. Users can understand change trends by change method, interactive, or workflow to ratify governance uptake. Users can drill into each change contextually to inspect transaction details and export these details to a flat file for further analysis offline.

Growth Analysis Dashboard

Provides analysis of how versions and hierarchies have changed over time by displaying the number of orphan and shared nodes, the total number of nodes, and the total increase or decrease in nodes from a previous version (for lineaged versions) and the total increase or decrease in the last 30 days for non-lineaged versions.

Request Monitoring Dashboard

Displays key performance indicators as they relate to open Oracle Data Relationship Governance requests allowing you to identify bottlenecks and requests that are overdue or near due, and

provides the ability drill-back into Data Relationship Governance requests to make changes to a request.

Model Analysis Dashboard

Provides analysis of Data Relationship Governance workflow model design by displaying historical performance of requests that are completed, including participant behavior trends, resource workload, and the ability to drill-back into Data Relationship Governance requests. Workflow model analysis reports on performance of completed requests processed by each workflow model to understand model performance based on service level agreements, level of automation achieved, cycle time, resources committed, request workload, throughput, and participant engagement.

User Role Assignment Report

Provides a list of users by role or roles by user with counts by licensed user types.

Access Group Membership Report

Provides a list of users by interactive and workflow user groups.

Object Access Group Authorization Report

Provides mapping of users and user groups to specific Data Relationship Management objects.

Hierarchy Access Group Assignment Report

Provides data grants of users and groups to nodes in a hierarchy.

Workflow Access Group Assignment Report

Provides data grants of users and groups to workflow model stages.

User Login Activity Report

Provides trend reports for user login activity over time.

Metadata Object Usage Report

Provides frequency distribution and aging information for Data Relationship Management objects: queries, compares, imports, exports, blenders, and books.

Web Service Connections

A new type of external connection - Web Service - is available to support the creation of external operations pointing to Web service endpoints. Use a Web Service connection to lookup external data accessible via a Web service or to commit data changes to an external system via a Web service. SOAP and RESTful Web services are supported.

External Operations

External operations can be defined and edited for Web service connections and database connections for Oracle and SQL Server. Database operations allow for custom SQL definition, stored procedure execution, and parameterized statements. Web service operations perform HTTP requests and receive responses using XML or JSON. External operations are configured as either lookup or commit. Lookup operations read data from an external system. Commit operations write data to an external system. Database and Web service connections can support multiple operations.

External Lookups

External lookup properties allow for enrichment of node property values using real-time data retrieved from an external database or Web service. Use the results of the external lookup to select an item from an external list of values for use as a property value or to calculate request item property values using data from an external source. External lookup properties are available in Data Relationship Management and Data Relationship Governance.

External Commits

External commit operations can be configured for governance workflow tasks to immediately synchronize approved changes to a target system. External commit operations are triggered after a governance request is committed. Execute SQL or stored procedures on a database to insert, update, or delete data. Invoke a SOAP or REST Web service to create, update, or delete data.

Dependent Workflow Tasks

Add Leaf and Add Limb tasks can be optionally configured with dependent workflow tasks. An additional request item is added to the request for each dependent task. Dependent items are only created for dependent tasks configured for the workflow stage. Dependent request items can be created when manually adding an item or when loading items from a file.

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Subtopics

Data Relationship Governance Enhancements

Calculate Name and Parent in Requests

Using dynamic scripts, workflow tasks can be configured to calculate Name and Parent property values for an item. Name property values can be calculated for Add Limb and Add Leaf tasks. Parent property values can be calculated for Add Limb, Add Leaf, Insert, and Move tasks.

Domains for Add Limb/Leaf Workflow Tasks

Domains can be configured with Add Limb/Leaf workflow tasks to create request items to add nodes to a specified domain. The target version for the request must be configured with the same domain for the node to be added to the version.

Override Parent in Enrich/Commit Workflow Stage

Governance users in Enrich and Commit workflow stages may override the parent of a request item added to a request in a previous stage. Add Limb, Add Leaf, Move, Insert, and Update workflow tasks can be configured to allow editing of the Parent property value.

Property Synchronization for Related Items

Property changes to non-key values for the same node are synchronized among related items. When related items exist, an update to one property value may change the item details display related items in the same request for another item if the two share common properties.

Enhanced Object Model for Dynamic Scripting

The dynamic scripting object model provides new objects for workflow requests, request items, and item details to access data stored in those objects for calculating request item properties such as Name or Parent. The GetNextID method for the System object provides access to the NextID feature to calculate the Name of new nodes using dynamic scripts.

Additional Language Support for User Interface

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

- Chinese—Simplified*
- Chinese—Traditional
- Danish
- Dutch
- Finish
- French—Canada
- French—France*
- German*
- Italian
- Japanese*
- Korean*
- Norwegian
- Polish
- Portuguese—Brazil
- Russian
- Spanish—Worldwide
- Swedish
- Turkish

Languages with an asterisk (*) were previously supported.

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Auto Size All Columns

On the hierarchy window, there is a new toolbar button labeled "Auto Size All Columns". When a hierarchy window is first opened, the specified View By columns are displayed using an equivalent percentage of total width available. Clicking the "Auto Size All Columns" button updates the width of all displayed columns based on the maximum length property value in each column. The resize is based on visible nodes on the current page. Any changes to column width, whether done manually or via the "Auto Size All Columns" button, are persisted as long as the given window is open.

Request Item Naming for Add Tasks

Governance request items using an originating workflow task configured with an Add Leaf or Add Limb action type must have a name defined at the time of adding the request item to a request. In order to preserve referential integrity with other related items in the request, the name of the request item cannot be directly edited after it has been added to the request. To rename an Add Leaf or Add Limb request item, use the Rename link provided with the Name property in the request item details. The Rename feature changes the name of the request item and synchronizes the new name to other request items which may refer to it as a parent or using a node data type property. Renaming a request item is available for any workflow stage where the Name property is editable.

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Subtopics

Data Relationship Governance Enhancements

Conditional Workflow Stages

A workflow model can be configured to conditionally alter the workflow path for individual requests. You can include or exclude particular workflow stages depending on whether request items have certain property values or if they fail certain validations. You can also separate request items that require different approvers and split enrichment tasks into different requests to follow separate workflow paths.

Separation of Duties

You can configure workflow stages to require a separate approving user who has not submitted or approved for any other stage in the request.

Request Items from File

Request items can be loaded into a workflow request from an external flat file created by a user or source system. You can load request items during a Submit or Enrich stage. Source files may be loaded using the Web Client or Batch Client.

Request Attachments

Attachments can be added to a workflow request to justify changes or explain an action that was taken. Attachments can be viewed and downloaded by request participants. File attachments are uploaded to a request using the Web Client.

Request Details for Transactions

The final approver for a committed request is recorded in the transaction history. Transaction detail provides audit information for each transaction including the user responsible for making the change in the request and when they made the change.

Improved Handling of Request Exceptions

- Submitters may withdraw their own in-flight requests.
- Commit users may access escalated requests along with Data Managers.
- Escalation users can advance the request for any stage.
- Data Manager role may unclaim any in-flight request and delete any request that has not been committed.

Workflow Request Page Improvements

- Tabbed layout for easy access to request content
- Show/hide control for task label and instructions
- Task property instructions
- Custom property labels by task
- Filter hierarchies used for request items by task
- Splitter to view more items or details

Oracle Planning and Budgeting Application Template

A new application template is available to auto-configure a Data Relationship Management application to import, manage, and export dimensions for the Oracle Planning and Budgeting Cloud. After the template is loaded, nodes can be created, organized into hierarchies, and assigned membership to Oracle Hyperion Planning dimensions in Data Relationship Management. The application template includes properties, categories, validations, node types, imports and exports. The application template can also be used to manage dimensions for classic Planning applications

Import Enhancements

Substitution Parameters

Substitution parameters can be used to pass in custom run-time parameters to imports. The values of these parameters can be used with import options for creating orphan hierarchies.

Single Section Import

You can load an import file that consists of a single import section and which does not contain a section header.

Skipping Header Records in File

Header records at the beginning of an import file can be skipped during the import process. The number of records to skip is configured in the import profile.

Orphan Hierarchies

Hierarchies can be automatically created from nodes that are imported as orphans into a version. A separate hierarchy is created for each top orphan node that has children but no parent in the version. Orphan nodes that have no children can be imported into a single stranded orphan hierarchy.

Ignoring Nodes

In the import profile, you can specify a list of nodes included in the source file that will be ignored during the import process.

Set Node Types and Assign Validations

You can configure an import profile to automatically assign a node type property and validations to all hierarchies being imported using the profile. This eliminates the need to handle these configurations for each hierarchy manually after import.

Formatted Memo Properties

You can import multi-line, formatted memo property values by enclosing the values in quotes.

Optional Section Header Suffix

You can leave the import file section header suffix blank.

Reverse Lookup

Lookup type properties can be selected for import section columns to perform a reverse lookup on column values being imported. The resulting value is stored in the defined property that uses the lookup property.

Export Enhancements

Substitution Parameters

You can use substitution parameters to pass in custom run-time parameters to exports. The values of these parameters can be used for selecting hierarchy groups, in query filters and in dynamic export columns.

Hierarchy Groups

Hierarchy groups can be used to auto-select hierarchies for exports instead of having to manually select the hierarchies for each export. Each export profile is configured with a hierarchy group property and hierarchy group. When a hierarchy is assigned to a hierarchy group, the hierarchy becomes immediately included in all exports using the group.

Dynamic Columns

You can use a dynamic export column to add a specific value to a column that is not present in the source version used by the export. You can specify a combination of literal values and substitution parameters in the dynamic column.

Improved Architecture

Data Relationship Management offers a streamlined application server architecture optimized for single machine, multi-processor deployments on 64-bit hardware. Each application utilizes a single engine and server, instead of the multiple engine and server configuration used in previous releases. These improvements result in higher concurrency of read operations, eliminate event traffic between engines, and reduce connections to and data transferred from the repository.

Web Client Accessibility

This release of Data Relationship Management is accessible. The Data Relationship Management Web Client supports accessibility requirements for people with a wide range of disabilities. This includes full keyboard navigation and compatibility with screen readers such as JAWS. Oracle Data Relationship Management supports accessibility at all times.

Features Introduced in Earlier Releases

Use the Cumulative Feature Overview tool to create reports of new features added in prior releases. This tool enables you to identify your current products, your current release version, and your target implementation release version. With a single click, the tool quickly produces a customized set of high-level descriptions of the product features developed between your current and target releases. This tool is available here:

https://support.oracle.com/oip/faces/secure/km/DocumentDisplay.jspx?id=1092114.1

Performing Key Tasks On The Go With Oracle EPM Mobile

In its first release, Oracle Enterprise Performance Management Mobile enabled you to manage approvals and workflow across Oracle Hyperion Planning, Oracle Hyperion Tax Provision, and Oracle Hyperion Financial Management. The latest release of the mobile app supports critical Close Manager and Data Relationship Governance functionality.

What's New

Download Oracle EPM Mobile 11.1.2.4 to perform these tasks:

- Using Close Manager, coordinate and complete all period-end close activities such as the following:
  - Viewing, submitting, approving, and rejecting tasks
  - Responding to notification alerts, such as investigating and resolving task errors or delays
  - Automatically managing and tracking task status
- In Oracle Data Relationship Governance, manage and submit change request approval workflows by performing tasks such as:
  - Filtering worklists to find your requests
  - Emailing participants associated with requests
  - Approving, escalating, rejecting, and pushing back on requests
  - Viewing invalid requests

For information about Oracle EPM Mobile, see the *Oracle Enterprise Performance Management Mobile User's Guide* : http://www.oracle.com/oll/epmmobile.

Downloading Oracle EPM Mobile

Download the mobile app:

- The Apple App Store: https://itunes.apple.com/us/app/oracle-enterprise-performance/id845082117
- Google Play: https://play.google.com/store/apps/details?id=oracle.epm.mobile.OracleEPM&hl=en

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