Oracle® Enterprise Performance Management System
Licensing Guide

Release 11.2

F12184-10

April 2023

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Oracle Enterprise Performance Management System Licensing Guide, Release 11.2

F12184-10

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Overview

This document, which is part of the Program Documentation under the terms of your Oracle licensing agreement, is intended to help you understand the features, functionality, and options available for Oracle Programs and the licenses required to use them. Oracle offers a variety of licensing options that determine your rights to run the Oracle Programs. If you have a question about your licensing needs, please contact your Oracle sales representative or refer to the resources listed in the "Related Documents" section below for more information.

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Oracle Hyperion Enterprise Performance Management Applications

This chapter describes Oracle Hyperion Enterprise Performance Management Applications licensed programs and their included products, components, options, and restrictions.

Included Products and Components

Table 2-1   Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
Hyperion Financial Close Suite	Comprehensive suite of required modules for financial consolidation, close and statutory reporting	• Hyperion Financial Management Plus • Hyperion Financial Close Management • Hyperion Financial Data Quality Management, Enterprise Edition • Hyperion Financial Data Quality Management, Enterprise Edition Adapter for Financial Management • Hyperion Financial Data Quality Management, Enterprise Edition Adapter Suite • Hyperion Financial Data Quality Management, Enterprise Edition ERP Source Adapter for SAP • Restricted use Essbase Plus (restricted to use with Hyperion Financial Close Suite only and further restricted to require each Aggregate Storage Option application created to share data and metadata with a deployed instance of Hyperion Financial Management Plus.) For a listing of options to this product, see Options.

Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
Hyperion Financial Management Plus	Hyperion Financial Management Plus is a financial consolidation and reporting application built with advanced Web technology, but used and maintained by the finance team. It provides financial managers the ability to rapidly close and report financial results, meet global regulatory requirements, reduce the cost of compliance and deliver confidence in the numbers. Restrictions and Notes: • WebLogic Server Standard Edition may only be used to host J2EE or Java application logic that is distributed as part of Hyperion Financial Management Plus. • HAL BASIC is not included. • See item (1) under Usage Notes and Restrictions.	• Restricted use Hyperion Data Relationship Management (restricted to use where dimensions and hierarchies may be targeted only to applications included with this product. Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.) • Restricted use Data Relationship Steward (restricted to quantity five (5) and restricted to use where dimensions and hierarchies may be targeted only to applications included with this product. Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.) • Hyperion Financial Reporting • Restricted use Oracle Data Integrator Enterprise Edition (restricted to use of the Oracle Data Integrator Studio Embedded Agent component for use with Hyperion Financial Management Plus as the only target. Please note that the embedded agent only allows execution of scenarios from the ODI studio user interface. Running scenarios in batch mode with the stand alone agent requires a full use Oracle Data Integrator Enterprise Edition license.) • Restricted use WebLogic Server Standard Edition (restricted to use for running Hyperion Financial Management Plus only) • Restricted use Oracle Internet Directory (restricted to storing Hyperion Financial Management Plus user information only) • Oracle Hyperion Foundation Services • Oracle Smart View for Office

Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
Hyperion Financial Close Management	Financial Close Management helps companies define, execute, and report on the interdependent activities of a financial close period. It provides centralized monitoring of all close process tasks and provides a visible, automated, repeatable system of record for running close processes. Restrictions and Notes: • WebLogic Server Standard Edition may only be used to host J2EE or Java application logic that is distributed as part of Hyperion Financial Close Management. • The restricted use license of WebLogic Server Standard Edition does not support HTTP Session or Servlet clustering functionality within WebLogic Server (as WebLogic Server Standard Edition does not include clustering). • Hyperion Financial Data Quality Management, Enterprise Edition and Hyperion Financial Data Quality Management, Enterprise Edition Adapter Suite must be licensed for use of the Account Reconciliation component of Hyperion Financial Close Management.	• Restricted use WebLogic Server Standard Edition (restricted to use for running Hyperion Financial Close Management only) • Restricted use Oracle Internet Directory (restricted to storing Hyperion Financial Close Management user information only) • Restricted use Web Services Manager (restricted to enabling web services within the Hyperion Financial Close Management application) • Restricted use Oracle Virtual Directory (restricted to enabling multiple external provider support within Hyperion Financial Close Management) • Oracle Hyperion Foundation Services

Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
Hyperion Planning Plus	Hyperion Planning Plus is a centralized, Microsoft Excel- and Web-based planning, budgeting, and forecasting solution that integrates financial and operational planning processes. Hyperion Planning Plus provides an in-depth look at business operations and its impact on financials by tightly integrating financial and operational planning models. With Hyperion Planning Plus, you can meet your immediate financial planning needs while enabling a platform for future cross-functional expansion and automated process integration. Restrictions and Notes: • WebLogic Server Standard Edition may only be used to host J2EE or Java application logic that is distributed as part of Hyperion Planning Plus. • This restricted-use license of WebLogic Server Standard Edition does not support HTTP Session or Servlet clustering functionality within WebLogic Server (as WebLogic Server Standard Edition does not include clustering). While the included restricted use version (SE) of WebLogic Server's servlet engine is restricted to be not clusterable, Hyperion Planning Plus applications can be clustered even when deployed on WebLogic Server SE using the Hyperion Planning Plus application's clustering and state replication mechanisms that are distinct from HTTP Session or Servlet clustering. • Essbase Plus cannot be used to create Essbase cubes that do not contain data used by the Hyperion Planning Plus application. • The Aggregate Storage Option component of Essbase Plus may not be used. • See item (1) under Usage Notes and Restrictions.	• Restricted use Hyperion Data Relationship Management (restricted to use where dimensions and hierarchies may be targeted only to applications included with this product. Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.) • Restricted use Data Relationship Steward (restricted to quantity five (5) and restricted to use where dimensions and hierarchies may be targeted only to applications included with this product. Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.) • Restricted use Essbase Plus (restricted to use only for accessing data from Hyperion Planning Plus) Customers that have both (i) Hyperion Planning Plus entitlement and (ii) full-use Oracle Essbase Plus entitlement may use Essbase deployed with Hyperion Planning Plus to support their full-use Oracle Essbase Plus user entitlement. In this scenario, users with entitlement to Hyperion Planning Plus may access only Hyperion Planning Essbase cubes. Users with entitlement to Hyperion Essbase Plus may not access Hyperion Planning Essbase cubes. Users with entitlement to both Hyperion Planning Plus and Oracle Essbase Plus may access all Essbase cubes. • Hyperion Financial Reporting • Restricted use Oracle Data Integrator Enterprise Edition (restricted to use of the Oracle Data Integrator Studio Embedded Agent component for use with Hyperion Planning Plus as the only target. Please note that the embedded agent only

Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
		allows execution of scenarios from the ODI studio user interface. Running scenarios in batch mode with the stand alone agent requires a full use Oracle Data Integrator Enterprise Edition license.) • Restricted use WebLogic Server Standard Edition (restricted to use for running Hyperion Planning Plus only) • Restricted use Oracle Internet Directory (restricted to storing Hyperion Planning Plus user information only) • Oracle Hyperion Foundation Services • Oracle Smart View for Office
Hyperion Tax Provision	Prerequisites: • Hyperion Financial Management Plus Or • Hyperion Financial Close Suite	
Hyperion Tax Governance		

Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
Hyperion Profitability and Cost Management	Understanding profitability and cost in your business is fundamental to improving performance. Hyperion Profitability and Cost Management is a new performance management application that provides actionable insights into cost and profitability. Hyperion Profitability and Cost Management drives business performance by discovering drivers of cost and profitability, empowering users with visibility and flexibility, and improving resource alignment. Restrictions and Notes: • Hyperion Essbase Plus cannot be used to create Essbase cubes that do not contain data used by the Hyperion Profitability and Cost Management application. • WebLogic Server Standard Edition may only be used to host J2EE or Java application logic that is distributed as part of Hyperion Profitability and Cost Management.	• Restricted use Hyperion Data Relationship Management (restricted to use where dimensions and hierarchies may be targeted only to applications included with this product. Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.) • Restricted use Data Relationship Steward (restricted to quantity five (5) and restricted to use where dimensions and hierarchies may be targeted only to applications included with this product. Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.) • Restricted use WebLogic Server Standard Edition (restricted to use for running Hyperion Profitability and Cost Management only) • Restricted use Oracle Internet Directory (restricted to storing Hyperion Profitability and Cost Management user information only) • Hyperion Financial Reporting • Restricted use Oracle Data Integrator Enterprise Edition (restricted to use of the Oracle Data Integrator Studio Embedded Agent component for use with Hyperion Profitability and Cost Management as the only target. Please note that the embedded agent only allows execution of scenarios from the ODI studio user interface. Running scenarios in batch mode with the stand alone agent requires a full use Oracle Data Integrator Enterprise Edition license.) • Restricted use Essbase Plus (restricted to use only for accessing data from Hyperion Profitability and Cost Management)

Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
		Customers that have both (i) Hyperion Profitability and Cost entitlement and (ii) full-use Oracle Essbase Plus entitlement may use Essbase deployed with Hyperion Profitability and Cost Management to support their full-use Oracle Essbase Plus user entitlement. In this scenario, users with entitlement to Hyperion Profitability and Cost Management may access only Hyperion Profitability and Cost Management cubes. Users with entitlement to Hyperion Essbase Plus may not access Hyperion Profitability and Cost Management Essbase cubes. Users with entitlement to both Hyperion Profitability and Cost Management and Oracle Essbase Plus may access all Essbase cubes. • Oracle Hyperion Foundation Services • Oracle Smart View for Office

Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
Hyperion Financial Data Quality Management, Enterprise Edition	Finance organizations need to enhance the quality of internal controls and reporting processes. To meet these goals, you need a source-to-report view of financial data. Hyperion Financial Data Quality Management, Enterprise Edition allows business analysts to develop standardized financial data management processes and validate data from any source system—all while reducing costs and complexity. Fully integrated with Oracle's performance management applications, Hyperion Financial Data Quality Management is the only enterprise-class system for managing the quality of financial data. Restrictions and Notes: These components must be licensed separately: • Hyperion Financial Data Quality Management, Enterprise Edition Adapter for Financial Management, or • Hyperion Financial Data Quality Management, Enterprise Edition Adapter Suite, or • Hyperion Financial Data Quality Management, Enterprise Edition ERP Source Adapter for SAP	• Restricted use Hyperion Data Relationship Management (restricted to use where dimensions and hierarchies may be targeted only to applications included with this product. Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.) • Restricted use Data Relationship Steward (restricted to quantity five (5) and restricted to use where dimensions and hierarchies may be targeted only to applications included with this product. Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.) • Restricted-use license to Oracle Data Integrator Enterprise Edition (ODI), restricted to use and modification of the Oracle Data Integrator Projects delivered with the Oracle Hyperion Financial Data Quality Management Enterprise Edition solely when used for Oracle Enterprise Performance Management applications. The ODI repository delivered with FDMEE may not be used for any other purpose or any custom integrations. • Oracle Hyperion Foundation Services • Oracle Smart View for Office

Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
Data Relationship Management Suite	Oracle Data Relationship Management Suite represents a bundle of components to help enterprises master, govern and analyze enterprise dimensions, alternate hierarchies and related attributes with a view to build alignment between how one runs one's business and measures its performance. The solution delivers referential integrity by mastering dimensions across transactional and analytical applications, either Oracle or third-party, on premise or in the cloud.	• Oracle Data Relationship Management • Oracle Data Relationship Management – Read Only Access • Oracle Data Relationship Governance • Oracle Data Relationship Steward • Oracle Data Relationship Management Analytics (available only with Data Relationship Management Suite) • Restricted use Oracle Internet Directory (restricted to storing DRM user information for use with DRM Suite components only).
Data Relationship Management	Data Relationship Management provides a dimension change management foundation for business applications, on-premise or in the cloud, to help curate, master and govern enterprise dimensions, hierarchies and reporting attributes across operational and analytical silos to enable fully reconciled, consistent, accurate and trustworthy reporting and business analytics. Restrictions and Notes • Set up of more than one public view requires the Data Relationship Read Only Access option. • See item (3) under Usage Notes and Restrictions.	A license to Oracle Data Relationship Management (DRM) includes restricted-use licenses to Oracle Data Integrator Enterprise Edition (ODI), the Java container in Oracle WebLogic Server Standard Edition (WLS), Oracle Data Relationship Read-Only Access Option (DRM ROA), and Oracle SOA Suite (SOA). ODI is restricted to its database, files, and XML knowledge modules used solely for extracting and preparing data for import into DRM. WLS is restricted to use with DRM, including SOA as restricted here. DRM ROA is restricted to a single public view. SOA is restricted to use of two components • Oracle Web Services Manager (OWSM), to authenticate and provide message-level security for DRM web services on WLS through the predefined policies provided with OWSM); and • Oracle BPEL Process Manager, to enable workflow functions to process requests within DRM.

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Table 2-1   (Cont.) Oracle Hyperion Enterprise Performance Management Applications: Included Products and Components

Product	Description	Included Products and Components
Data Relationship Steward	Oracle Data Relationship Steward entitles licensed users to interactively manage, administer, and secure master data within the Oracle Data Relationship Management repository. The data steward is a role established within organizations to manage the consistency, quality and integrity of master reference data sets across enterprise information systems. Restrictions and Notes: Prerequisites to be licensed separately: • Data Relationship Management and/or • Data Relationship Management for Oracle Hyperion Financial Close Suite and/or • See item (3) under Usage Notes and Restrictions.	N/A
Data Relationship Governance	Oracle Data Relationship Governance entitles licensed users to participate in master data change management and remediation workflows that are targeted at the Oracle Data Relationship Management repository. Any user who needs to submit, enrich, approve, commit or be notified of a request within the Oracle Data Relationship Governance application, whether it be via a user interface or a service interface, must be have licensed access to this module. Restrictions and Notes: Data Relationship Management must be licensed separately.	

Options

Options for products are listed in the following sections.

Options for Hyperion Financial Close Suite

Table 2-2   Options for Hyperion Financial Close Suite

Product	Notes	Included Products and Components
Data Relationship Management for Hyperion Financial Close Suite	Restrictions and Notes: • Hyperion Financial Close Suite must be licensed separately. (License metric and quantity of this option and Hyperion Financial Close Suite must be the same.) • Data Relationship Steward must be licensed separately (minimum 1 per customer). • See item (2) under Usage Notes and Restrictions.	Restricted use Data Relationship Management (restricted to use where dimensions and hierarchies may be targeted only to applications included within Hyperion Financial Close Suite). Dimensions and hierarchies may not be targeted to other systems, such as a data warehouse.

Options for Hyperion Financial Data Quality Management, Enterprise Edition

Table 2-3   Options for Hyperion Financial Data Quality Management, Enterprise Edition

Product	Notes	Included Products and Components
Hyperion Financial Data Quality Management, Enterprise Edition Adapter for Financial Management	Restrictions and Notes: Hyperion Financial Data Quality Management, Enterprise Edition and Hyperion Financial Management Plus must be licensed separately.	N/A
Hyperion Financial Data Quality Management, Enterprise Edition Adapter Suite	Restrictions and Notes: To be licensed separately: Hyperion Financial Data Quality Management, Enterprise Edition and the associated target application such as Hyperion Planning Plus, Essbase Plus, and/or other Oracle Application	• Hyperion Planning Plus Adapter • Essbase Adapter • Hyperion Financial Close Management Adapter • Oracle ERP Application Adapters • Planning and Budgeting Cloud Service Adapter See the EPM System Certification Matrix for specific sources and versions.
Hyperion Financial Data Quality Management, Enterprise Edition ERP Source Adapter for SAP	Restrictions and Notes: Hyperion Financial Data Quality Management, Enterprise Edition must be licensed separately.	N/A

Options for Data Relationship Management

Table 2-4   Options for Data Relationship Management

Product	Notes	Included Products and Components
Data Relationship Management Read Only Access	Data Relationship Read Only Access provides the ability to create multiple public views within Oracle Data Relationship Management. Each public view may be configured to allow casual business users to browse, query, compare, export and download, without user authentication, those perspectives most relevant to the target user community. Restrictions and Notes: • Data Relationship Management must be licensed separately. • See item (2) under Usage Notes and Restrictions. • See item (3) under Usage Notes and Restrictions.	

Usage Notes and Restrictions

1. Customers with legacy Hyperion pre-System 9 product licenses must pay a Foundation Enablement migration fee to migrate to the corresponding Oracle Hyperion licenses, which include Hyperion Foundation Services. Additional information can be found on eSource at License > Migration > Migration Pricing Practices > Acquisition Specific Migration Practices > Hyperion Migration Practices. A detailed license mapping spreadsheet can be found on eSource at License > Migration > Product Migration Listing > Hyperion Pre-System 9. If you are an Oracle partner, please contact your Oracle Representative for additional information.

2. Hyperion product option license quantities must match the number of licenses of the associated Hyperion product. This rule applies to all license models: Component, Customer Application Suite, and Enterprise. Examples include the following:

    The number of Data Relationship Management for Hyperion Enterprise Financial Close Suite Application User licenses must match the number of Hyperion Enterprise Financial Close Suite Application User Licenses. Similarly, the number of Data Relationship Management for Hyperion Enterprise Financial Close Suite Enterprise $M in Revenue licenses must match the number of Hyperion Enterprise Financial Close Suite Enterprise $M in Revenue licenses.

3. Authorized use of DRM APIs: Data Relationship Management Web Services APIs are available to Oracle Data Relationship Steward or Oracle Data Relationship Governance licensed users who have been provisioned with an appropriate role in one or more Data Relationship Management applications. Individual licensed users must be used when performing API operations which modify data in a Data Relationship Management application. Proxy users with an Oracle Data

Relationship Steward license are *not* permitted to perform create, update or delete operations in real-time or in batch using the DRM API or DRM Batch Client.

Proxy users are permitted to use the DRM Request API. This API offers the ability to create and update requests which would be used by external workflow applications to persist pending changes to DRM. Proxy users may *not* be used to commit changes to DRM that were approved via an external workflow. Final approvers or committers must be licensed Oracle Data Relationship Steward users with user roles authorized to interactively make changes within DRM to ensure audit integrity.

Similarly, a proxy user with the Governance User role may be used to programmatically submit changes from external systems into the Oracle Data Relationship Governance application. Further, proxy users may also invoke the DRM API/web services via the Anonymous User role provided one has licensed the Oracle Data Relationship Management Read Only Access option. In addition to enabling public browse access to specific target audiences, this license authorizes read access using the DRM web services API.