



Hyperion Focus  
'EPM in 2020'  
11 Feb 2020 London

keyteach



ORACLE

EPMWARE

# EPMWARE

Master Data  
Data Governance  
Workflow Automation

**Metadata Made Easy – Hyperion Focus**

**February 11, 2020**



# Profile

Headquartered in Silicon Valley,  
EPMware maintains a global  
presence with offices in New York  
City and Mumbai.

1

## **EPMware Software**

On-Premise and AWS SaaS  
Cloud offerings

2

## **Consulting**

EPMware and Partner  
Consultants carry a wide variety  
of technical and functional skills  
across ERP and EPM platforms.

3

## **Training & Support**

Custom & on-demand training  
available online.

24 x 7 Support via  
[epmware.com](http://epmware.com)

**EPMWARE**

# EPMware Company History

On-Premise to Cloud

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## LAUNCH

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### 2014

EPMware is launched in Silicon Valley. With a vision to bring metadata management and visibility to business users, EPMware develops a solution that users and consultants have been eagerly awaiting.

## EPMware On Prem

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### 2015

EPMware releases Version 1.0 On Premise, Beta trials begin. Early reviews from Oracle ACE directors, ODTUG community and consultants validate design.

## EPMware Cloud

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### 2016

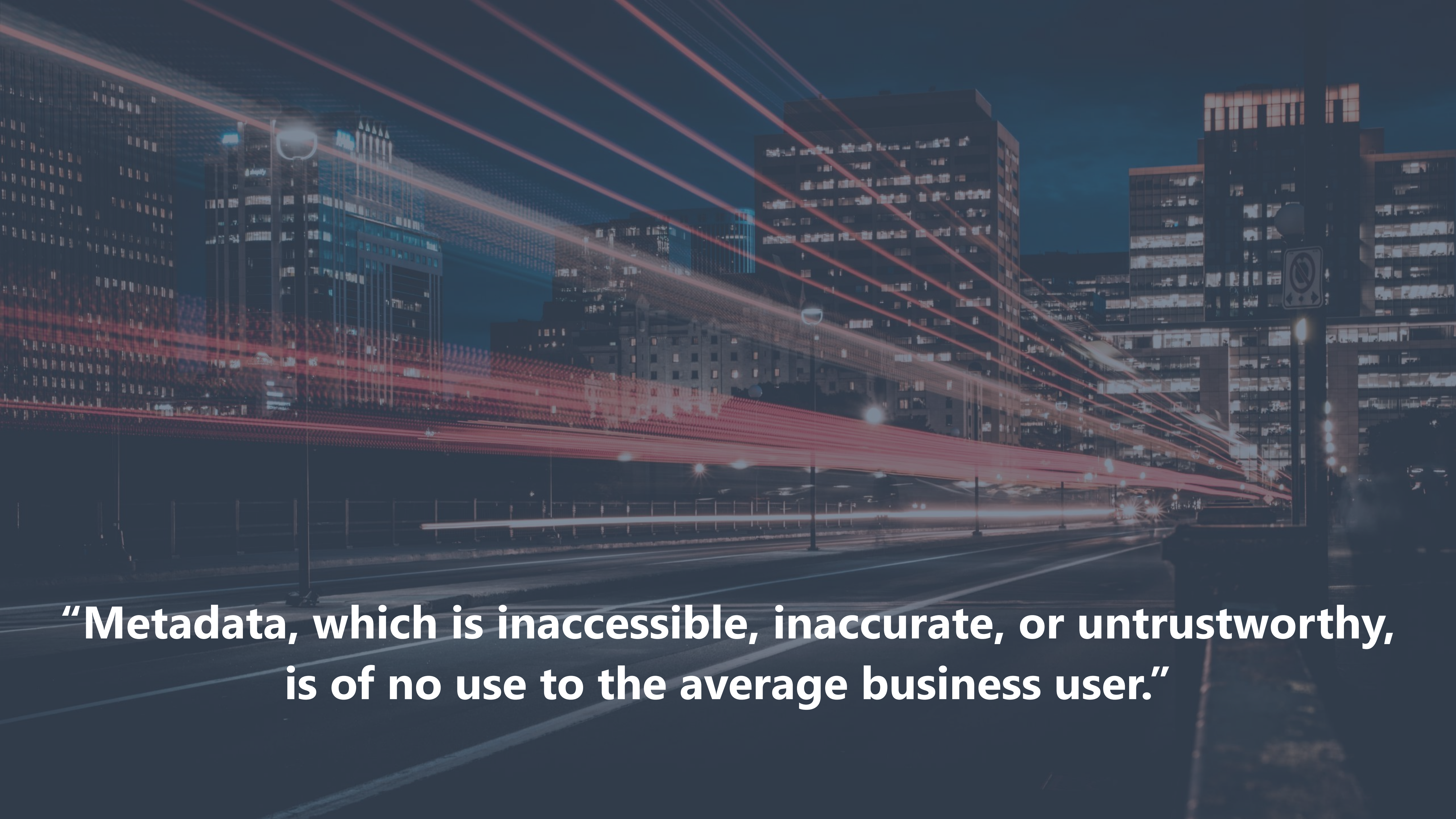
EPMware Cloud is available on AWS. EPMware adds support for Oracle Cloud applications. Strategic partnerships aligned.

## NOW

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### 2020 & beyond

Successful implementations and use cases drive enhancements. Additional global partnerships and training programs created. Target application support expand to ERP and BI applications.

A long-exposure photograph of a city street at night. The image shows light trails from cars and buildings, creating a sense of motion and urban activity. The sky is dark, and the city lights are prominent. A quote is overlaid at the bottom of the image.

**“Metadata, which is inaccessible, inaccurate, or untrustworthy, is of no use to the average business user.”**

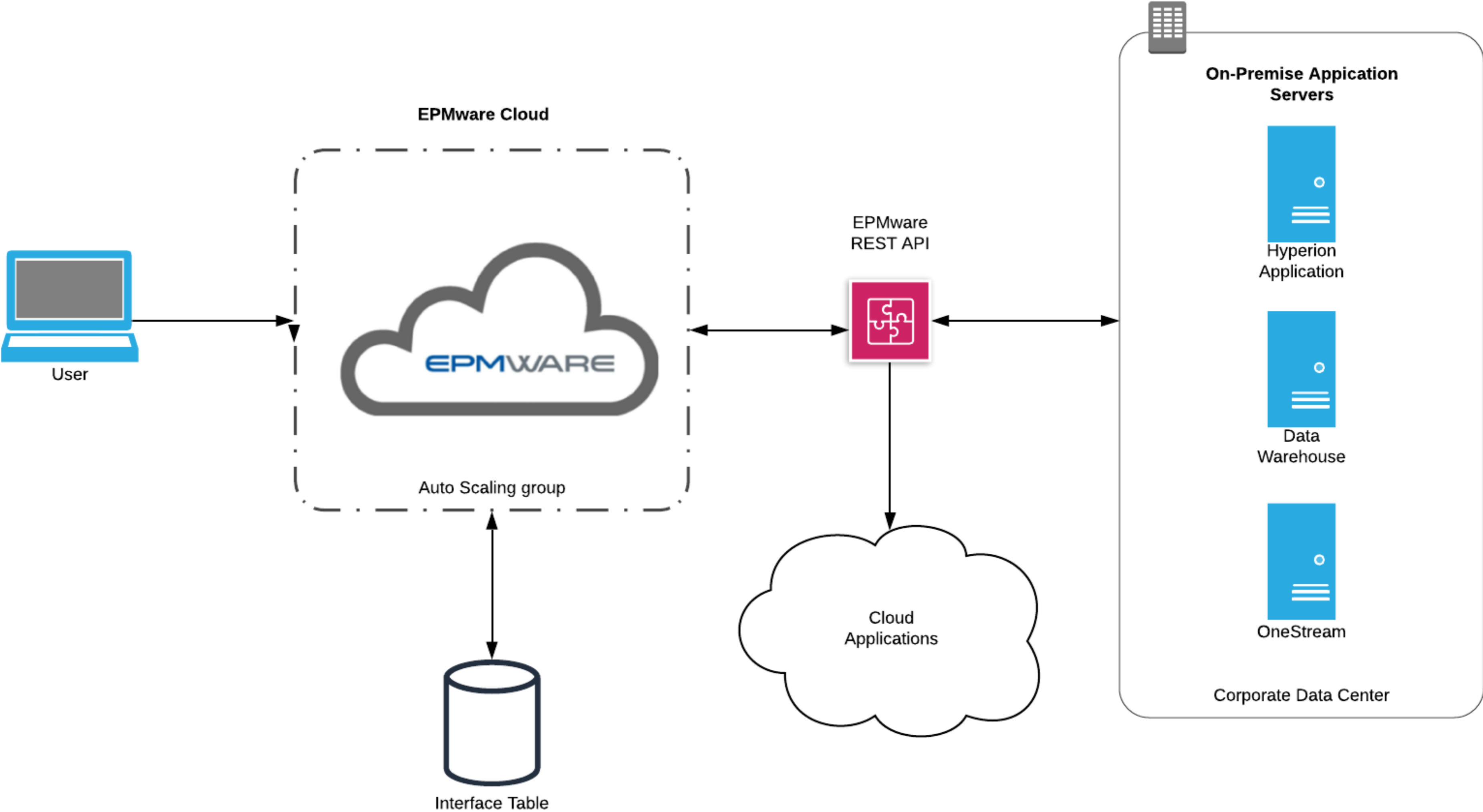
# **WHAT** IS EPMware?

**EPMware creates a single source of governed truth for metadata. Out of the box application adapters make integrations an effortless process.**

**Metadata Management – Data Governance – Audit – Workflow - Automation**

# Metadata Flow

Metadata can be created by users or applications

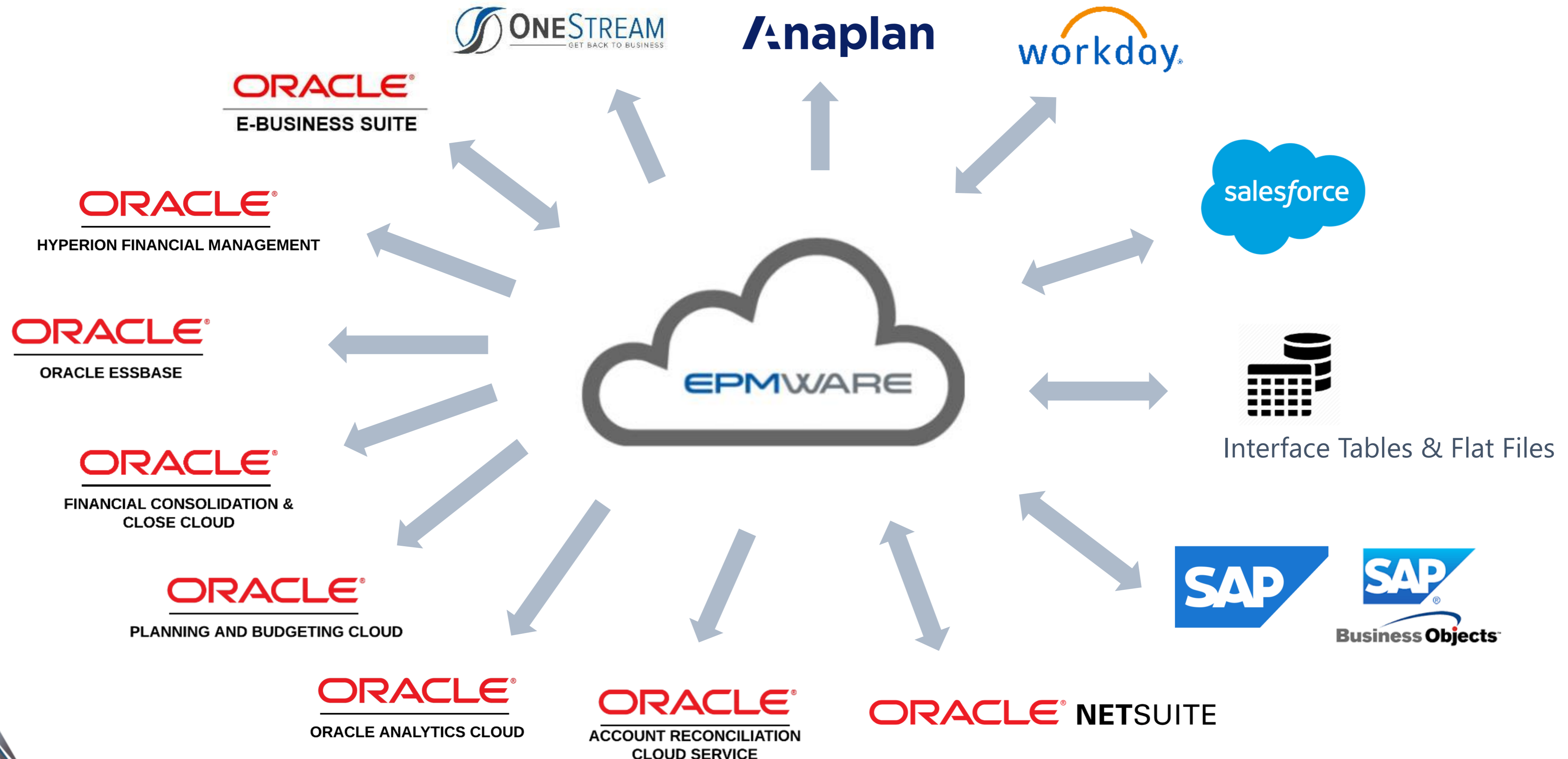


# Creating Metadata

1. Create metadata requests via web application
2. Submit requests into a workflow
3. Workflow guides the request to reviewers and approvers
4. Monitor real time progress in the dashboard
5. EPMware deploys metadata to the target application(s)

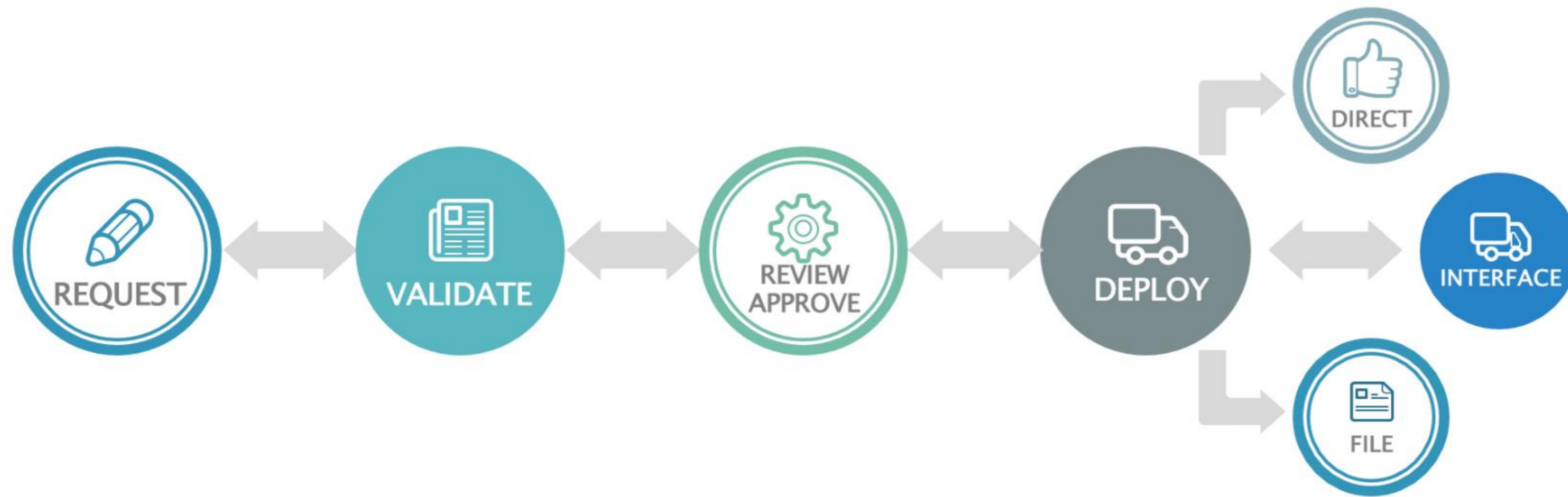
# Target Adapters

Our growing list of out of the box adapters create instant integrations



# Interactive Workflows

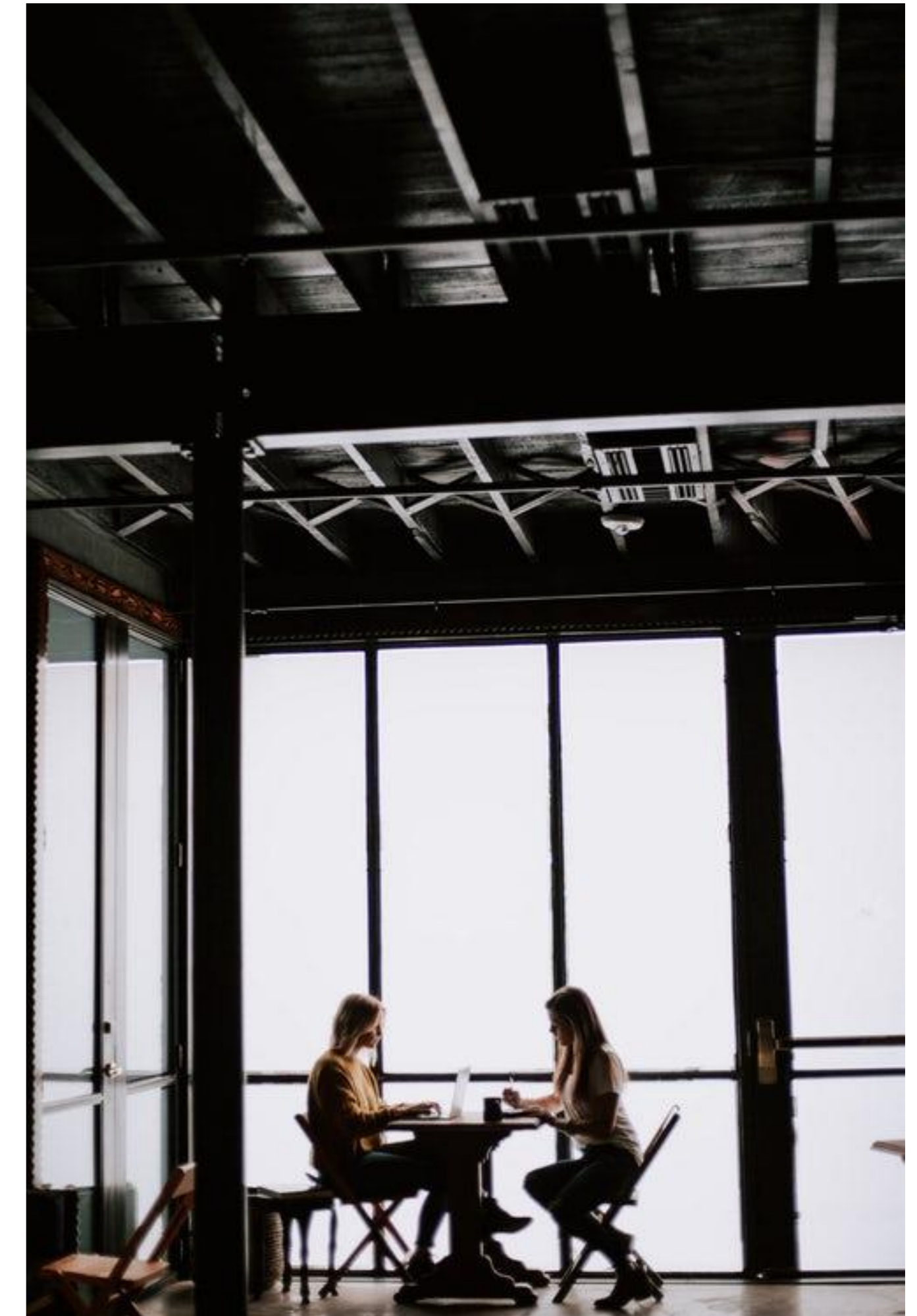
Visibility and traceability of metadata requests = happy auditors and



**Multiple Approvals – Email Notifications**

**Segregation of duties – Multi- Environment Deploy**

**Real time Business logic validation**



# Traditional Metadata Management

An evolving initiative

Users



Metadata change requests



# Traditional Metadata Management

An evolving initiative

Metadata change requests

JIRA



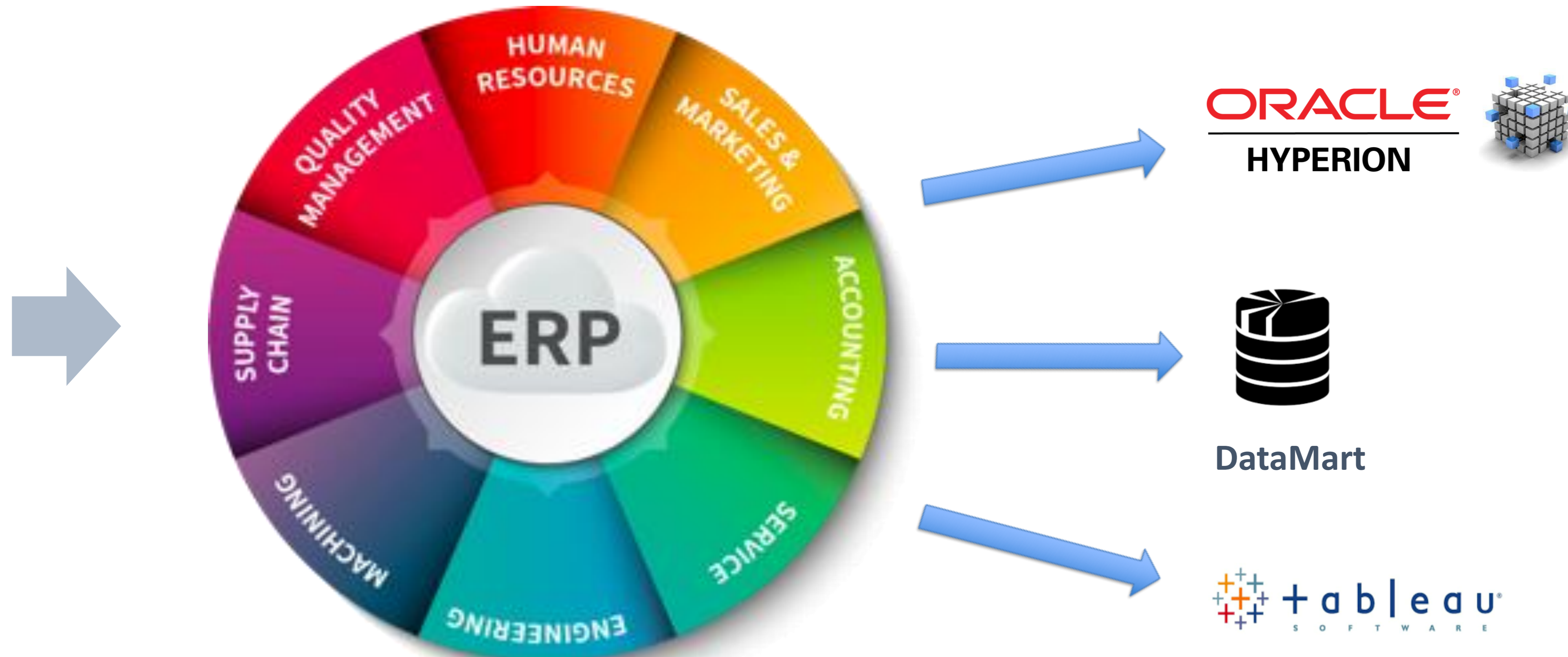
service  
now



Admin translates request and loads to all apps

# Traditional Metadata Management

ERP as the hub



# Governance as the Hub

The future state as an evolving initiative

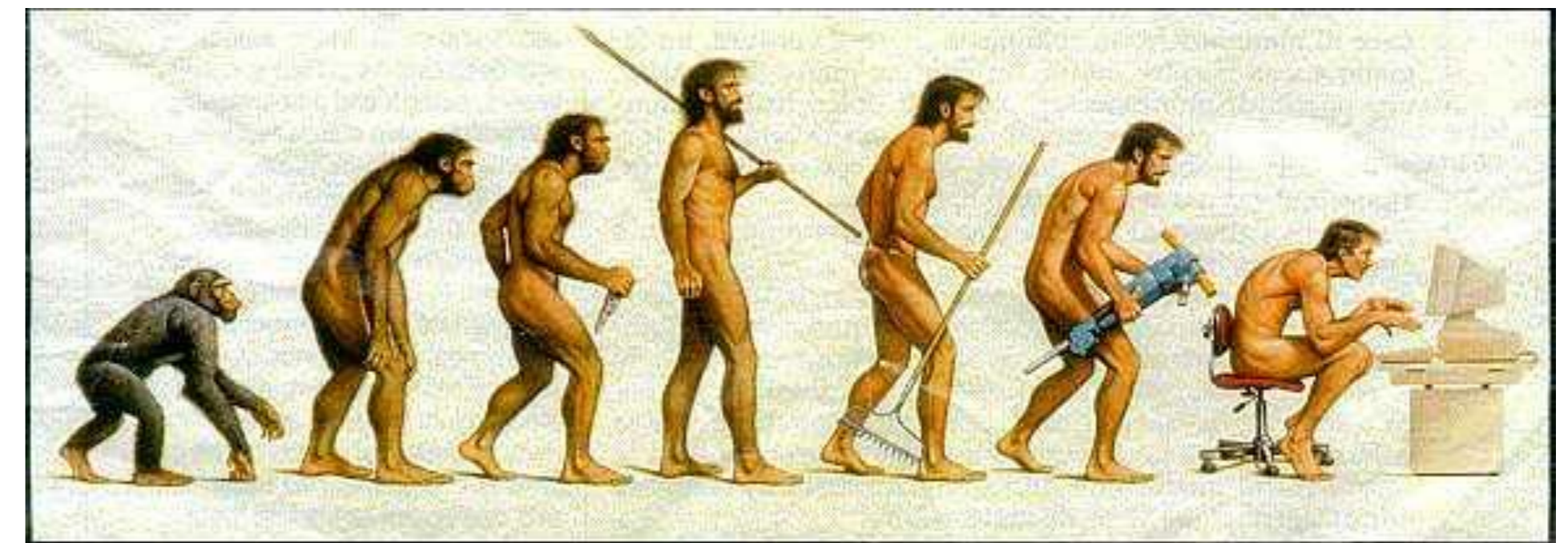


# Starting the evolution

The future state as an evolving initiative

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- Identify the use cases
- The IT and Business partnership will govern the success of the MDM program
- One size fit all products do not exist (yet)
- Deliver in Phases



**Somewhere, something went terribly wrong**

# Key Takeaways

The future state as an evolving initiative

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- Rationalization where possible, it is the foundation of all data quality
- Due to system restrictions, complete alignment or rationalization may not be possible.
- Mapping between applications is a common way to maintain alignment between applications but should be traceable – Application Master Data



**The times they are a changin'**

# EPMA is gone from version 11.2 on

After about 10 years, EPMA has finally kicked the bucket. It was a good run.

## Agenda: Planning for the change

- What are the options for metadata management after the upgrade?
- What will you have to rebuild to get EPMA like features back?
- What features of EPMA will no longer be available?
- Is Oracle Cloud on your future roadmap?
- How do data governance requirements impact the decisions?



# Options after upgrading – DRM Lite

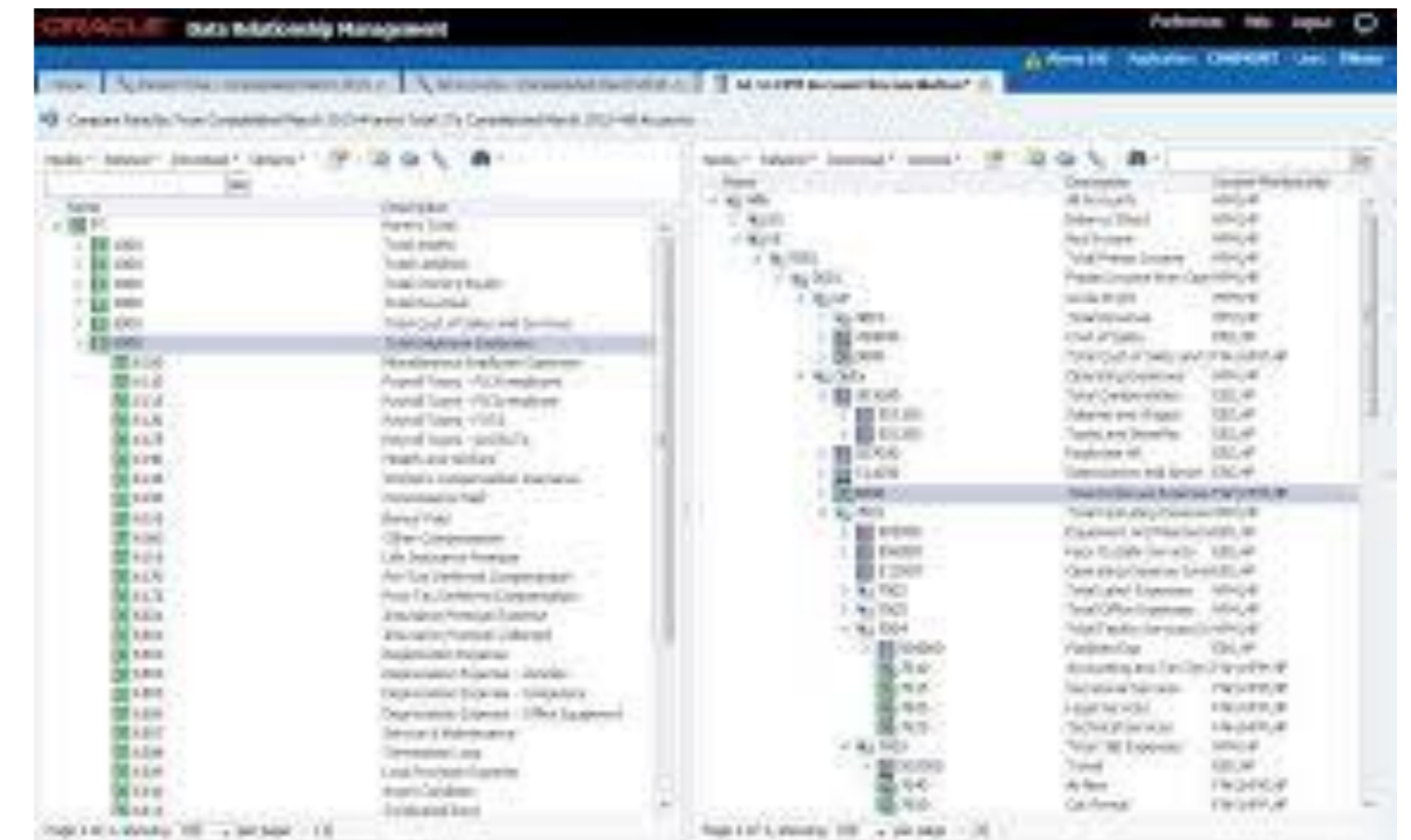
Oracle is including a limited use DRM (Data Relationship Management lite) with 11.2

## What is included

- Oracle Hyperion On-Premise application management only
- Data Relationship Steward roles limited to max 5 users
- Migration Utility / Scripts / Guides

## What is NOT included

- Read or feed from any other application or Data Warehouse (e.g., Oracle EPM Cloud, Oracle Analytics Cloud, Transactional applications, ODS, D/W, Non-Oracle apps)
- DRG (Data Relationship Governance) – review / approval capabilities
- DRM Analytics (Dashboard Capabilities)
- Unlimited node count - 30k row limit? (node limit)? – not sure about this...



# Rebuilding EPMA like functionality - Validations

Validations for EPMA applications, full list available here. These must be rebuilt in DRM lite.

[https://docs.oracle.com/cd/E40248\\_01/epm.1112/epma\\_help/frameset.htm?apb.html](https://docs.oracle.com/cd/E40248_01/epm.1112/epma_help/frameset.htm?apb.html)

## HFM

- Invalid characters, Member naming conventions, Shared member checks, Required associations, Required dimensions, Default member, and more...

## Planning

- Alias and member name checks, Alias and member name unique checks, Attribute dimension associations, Period and Year validations, Max number of years, Minimum required dimensions, and more...

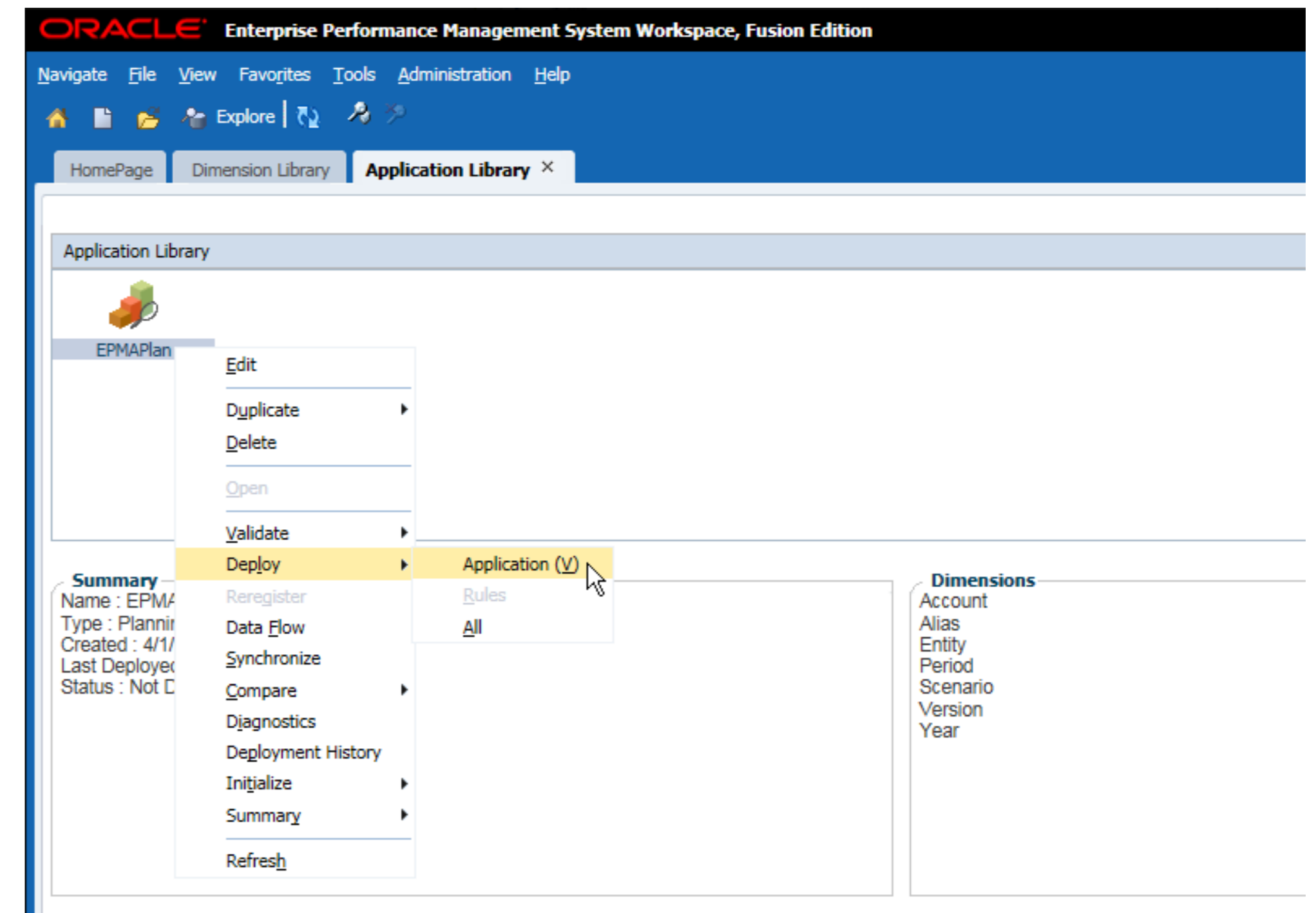
## Essbase ASO and BSO

- Attribute dimension association, Sort order, Dimension and member name character length and uniqueness, Smart List duplicate values, Base level data storage property values, Stored hierarchy shared member settings, Formulas in dynamic hierarchies only, and more...

# Rebuilding EPMA like functionality – Direct Deployment

Direct deployments must be rebuilt with DRM lite and the fully licensed version

- Run all validations before deploying
- Compare applications before deploying



# Migrating to Oracle Cloud

If Oracle Cloud is in your future roadmap, think about how to keep applications in sync with Classic and on-Prem applications or your ERP.

- Few current customers migrate all applications to the cloud in one project
- Metadata management across disparate applications can take days or weeks due to hierarchy alignment and rationalization
- EPMware can seamlessly connect to On-Prem and Cloud applications to maintain a hybrid landscape



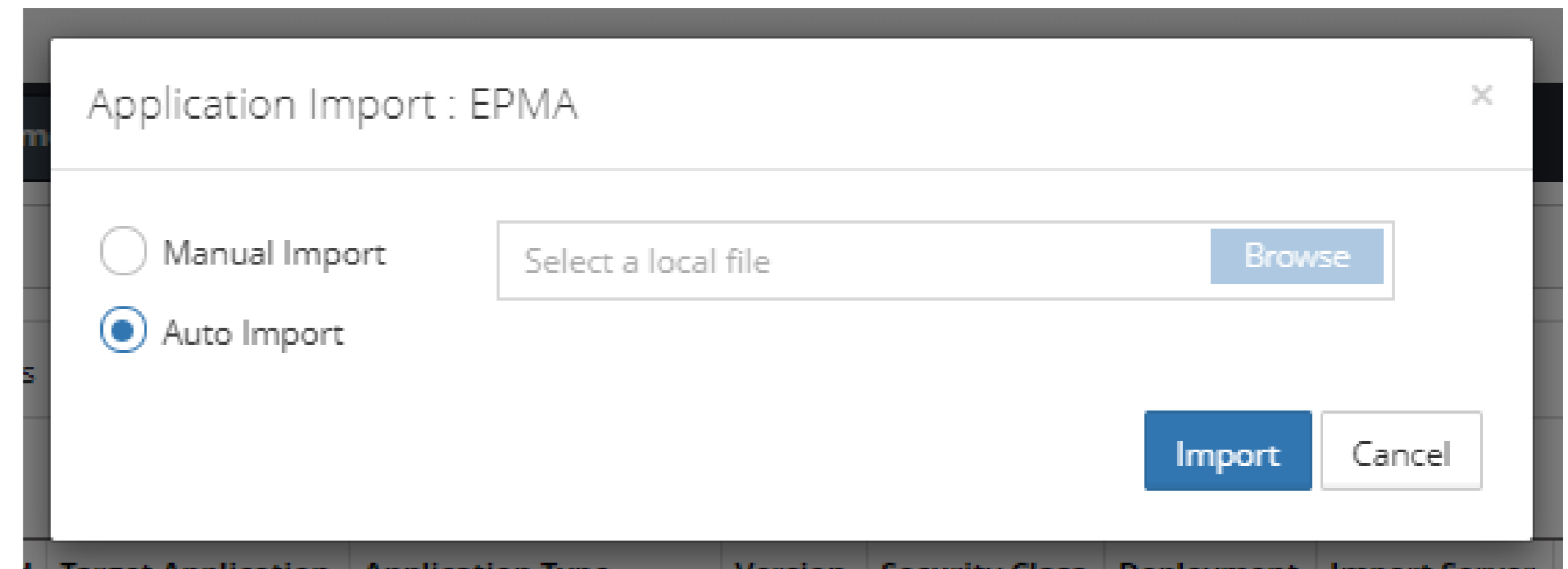
[www.EPMware.com](http://www.EPMware.com)

# Steps to manage metadata on 11.2

1. Upgrade to 11.2
2. Register applications, and click Import
3. Configure workflow (optional)
4. Configure scheduled deployments (optional)

## Advanced MDM and Governance

- Add Custom validations
- Advanced workflow
- Advanced governance and mappings



# Consulting Effort and License Impact

In most cases, customers will have either a consulting cost impact and/or a license impact. Develop a metadata and data governance strategy **before** choosing the technology.

- DRM Lite / DRM / EDMCS / EPMware will almost all require a consulting effort
- The existing EPMA footprint & level of automation will guide how long this effort will take
- We can help you evaluate this impact regardless of your technology choice





**Demonstration**

# Exclusive Capabilities

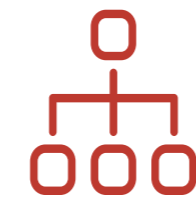
Only available in EPMware

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## Auto Import Hierarchies

One click import of hierarchies



## OOB Target System Integration

Deploy metadata on day 1



## Deployment Engine

Built in deployment scheduler



## ERP Import Module

Auto scan ERP or interface tables for new metadata



## Data Governance Dashboard

Real time visibility of reviewer and approver activity



## Real Time Validations

Point of entry rule based validations



## Built in Validations

Pre-built Hyperion validation logic out of the box



## No Per Node Fees

On-Prem or Cloud... NO PER NODE FEES!!!



# CONTACT US

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[WWW.EPMWARE.COM](http://WWW.EPMWARE.COM)



**SAN JOSE**



**NEW YORK CITY**



**MUMBAI**



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# Thank you's

- Everyone who registered and is supporting Hyperion Focus events
- To the co-hosts and presenters
  - Keyteach ([www.keyteach.com](http://www.keyteach.com))
  - DSP ([www.DSP.co.uk](http://www.DSP.co.uk))
  - EPMWare ([www.epmware.com](http://www.epmware.com))
  - Oracle EPM ([www.oracle.com/applications/performance-management](http://www.oracle.com/applications/performance-management))
  - AMOSCA ([www.amosca.co.uk](http://www.amosca.co.uk))
- Jo – for co-ordinating and organising us