What's New in Oracle EPM Hyperion 11.1.2.3

Edward Roske
info@interrel.com
LookSmarter.BlogSpot.com
@ERoske
These slides represent the work and opinions of the presenter and do not constitute official positions of Oracle or any other organization.

This material has not been peer reviewed and is presented here with the permission of the presenter.

This material should not be reproduced without the written permission of interRel Consulting.
11.1.2.3 Highlights – Released end of April 2013

- Mobile Financial Reporting
- ASO in Planning
- Tax Provisioning Solution
- No more Excel Add in
- OBIEE in Smart View (11.1.1.7)
- HSF in Smart View
Tell Me More!
What’s New in Essbase 11.1.2.3?

BI / EPM Applications
- Planning & Forecasting
- Strategy Management
- Profitability Management
- ERP Analytics
- CRM Analytics
- Industry Analytics

BI / EPM Platform
- Query & Analysis
- Interactive Dashboards
- Scorecards
- Reporting & Publishing
- Office Integration
- Search
- Detect & Alert
- Embedded
- Mobile

Data Sources
- OLTP & ODS Systems
- Data Warehouses
- Data Marts
- Data Integrations (Essbase, Oracle, SAP, Others)
- Unstructured & Semi-Structured
- Excel XML/Office
- Business Processes

Common Enterprise Information Model

BI Server

Essbase

Dimension Management

Predictive Analytics

What’s New in Essbase 11.1.2.3?
Recap – What was New in Essbase 11.1.2.2?

- BSO Performance Enhancements
- Optimized ASO Distinct Count Calculations
- MDX Query using unique name for shared members
- MDX Property Expressions
- Changing Essbase Server & Application Log Levels in EAS
- Throttle Active Transactions
- Essbase API Changes
- Configuration Setting (essbase.cfg) Changes
- CALCPARALLEL Command Enhancement
- New MDX Functions
- MaxL Grammar Changes
- UNC Path Support
- New Calculation Function
- New essbase.cfg Configuration Setting
What’s New in Essbase 11.1.2.3?

New BSO functions and calc script commands - @INTERSECT, @ISMBRUDA, @ISRANGENONEMPTY, @MEMBERAT, @RANGEFIRSTVAL, and @RANGELASTVAL

@CREATEBLOCK

RUNTIMESUBVARS

ESTIMATEDHASHSIZE
What’s No Longer in Essbase 11.1.2.3?

- No Essbase Excel Add-In 11.1.2.3
  - Further, earlier versions of the Add-In that you may have (like 11.1.2.2) are not supported against Essbase 11.1.2.3
  - It probably will work (the Add-In is wonderfully backwards and forwards compatible) but it's not supported

- Data Mining is gone. Many people didn't even know it was there, but it's been removed
What’s New in OBIEE 11.1.1.7?
What was new in OBI EE 11.1.1.6.1 & 6.2?

- Streamlined MUD Merge Process
- Automated Repository Patching Process
- Support for Aggregate Persistence in a Cluster
- First_Period and Last_Period Time Series Functions
- Updates in Fusion Middleware Control
- Auto complete for prompts and other prompt enhancements
- Optional Apply / Reset Buttons for Prompts
- Favorites / Manage Favorites
- Enhancements to Map Views
- Enhancements to Selections (Siblings, Leaves, Keep Only)
- Enhancements to Views, Tables, Pivot Tables
- Trellis charts
- Microsparkline charts
- New Mobile App
New app called Oracle BI Mobile HD

- Prompts are more touch friendly
- Interactive, drillable Charts
- Support for new Trellis charts
- Save content locally so you can view a dashboard or analysis offline
  - New menu option – Save to Local
  - Static view only
  - Charts, drilling and prompts are disabled
  - Can be refreshed on demand
What’s New in OBIEE 11.1.1.7?

- Best Visualization / Recommended Visualizations
- Breadcrumbs & other navigation improvements
- Waterfall Graphs
- Stacked Graphs / 100% Stacked Graphs
- Performance Tile
- OBIEE accessible in Smart View
- Essbase & OBIEE common installer - many benefits
What's New 11.1.1.7: Best Visualization

- When you create a view, you can choose a recommended view type based on the data in your analysis and, optionally, what you want to use it for.
- You can choose a suggested “Best Visualization” as well as a “Recommended Subtype”.
- Or you can instead choose the “Recommended Visualization” option.
- Will the view compare values, compare percentages, visualize trends, or something else?
A waterfall graph lets you visualize how a value increases or decreases sequentially and cumulatively.

An initial value is summed with subsequent values (both negative and positive changes or deltas) to arrive at an end value, focusing your attention on how each measure contributes to the whole.
Stacked graph as a new subtype to the area graph

Useful for comparing the proportional contributions within a category

A stacked graph displays the relative value that each part contributes to the whole
This release adds the following tools to the list of BI desktop tools that are available for download:

- Oracle Hyperion Smart View for Office
- If Essbase is installed
  - Oracle Hyperion Financial Reporting Studio
  - Oracle Essbase Studio Console
  - Oracle Essbase Administrative Services Console
What's New in 11.1.1.7: EPM Workspace Integration

- Run OBIEE from within the EPM Workspace
- Single sign on between OBIEE and Essbase
  - ** Uses Fusion Middleware application roles and policies for Essbase
- Essbase and OBIEE share the same security
- Single installer for Essbase and OBIEE
- Install Essbase into the same Weblogic domain as OBIEE
  - Side benefit - Allows Essbase as an aggregate persistence target
What’s New in OBIEE 11.1.1.7: Smart View Support

- Create a private connection with OBIEE URL
  - http://servername:9704/analytics/jbips
- Open OBIEE analysis in Excel via the Smart View Add in
- Create new OBIEE analysis
  - Use Excel pivoting capabilities
- Browse the web catalog in the Smart View panel
OBIEE 11.1.1.7 & Smart View

- Can insert a simple spreadsheet
  - Mask data to hide data
- Chart
  - Static image
  - NativeExcel chart
- Interactive with prompts
- Hierarchical options work
- Can insert into native Excel pivot
- Create new content with View Designer
- Save by using Publish option on SV ribbon
- Support for Word and PPT
What’s New in Planning 11.1.2.3?

BI / EPM Applications

Planning & Budgeting
Financial Close and Reporting

Strategy Management
Profitability Management

ERP Analytics
CRM Analytics
Industry Analytics

BI/EPM Platform

Query & Analysis
Interactive Dashboards
Scorecards
Reporting & Publishing
Office Integration
Search
Detect & Alert
Embedded
Mobile

Common Enterprise Information Model

BI Server
Essbase
Dimension Management
Predictive Analytics

Data Sources

OLTP & ODS Systems
Data Warehouses
Data Marts
Exadata
OLAP Sources
Packaged Applications (Oracle, SAP, Others)
Unstructured & Semi-Structured
Excel XML/Office
Business Processes

What’s New in Planning 11.1.2.3?
What was New in 11.1.2.2 Planning?

- New Application Design Framework (ADF)
- Interactive Charts and Grid Composite in Data Forms
- Project Financial Planning Application (AWESOME!!!)
- Rolling Forecast Set Up
- “All Years” Parent in Year Dimension
- Attach Multiple Documents and Comments to a Cell
- Group Support for Approvals
- Predictive Planning (Crystal Ball)
- Task List Home Page
- Embed Charts and Graphs into Data Forms
- Search and Filter within Smart Lists
- Grid Diagnostics
- Master Detail – Linking in Data Forms
- Calc Manager Debugger
- Calc Manager ONLY option for business rules – no more classic HBR
What’s New in Planning 11.1.2.3?

- Planning & Budgeting Cloud Service (PBCS)
- ASO Support with Planning
- User Defined Members
- Export to Metadata and Data to RDBMS
- Web & Excel data and metadata load
- Task List Report Visualizations
- Grid Fetch preferences
ASO In Planning

- Planning interface to write back to ASO database
- Benefits
  - Unified security
  - Supporting detail for ASO
  - Provides higher level of granularity
  - Faster aggregation
  - Composite forms to display ASO and BSO
  - No need to create Essbase direct cube
- You can add ASO cube during application creation or later
- Still have the 3 custom BSO cubes (and the modules)
- Number of ASO cubes = number of BSO cubes + 1
- Write back supported
- Must have full version Essbase license
New Task List Dashboard and Report page

- Create visualizations by status, type, user, date and display task list status graphically
- Filter relevant tasks from graph
- Excel or pdf reports displayed by column
Update Dimensions from Smart View

- Functional admins can work in excel
- Download the Smart View for Office administrator client
- Update dimensions from Smart View Excel
- Add and move members & update Member properties
UI to Load Data and Metadata from the Web

- Outline Load utility is exposed over the web
- Import and Export Data and Metadata from Planning UI
- Use FDM when:
  - Requires mapping
  - Drill back
  - Source integration
UI to Load Data and Metadata from the Web

- Outline Load utility exposed over the web
- Import from File (import metadata and data)
  - Period, Year, Scenario, Version, Currency, Entity, user-defined dimensions, attributes, UDAs, exchange rates, Smart Lists, and planning unit hierarchies
- Export Data to File
- Export Metadata to File
- To use the interface, select Administration, then Outline Load, and then select Import from File, Export Metadata to File, or Export Data to File.
- Use FDM when requirement dictates mappings, Drill back and / or Source integration
Dynamic Member on the Fly

- Allows end users to add new member names on the fly
- Members are available for use (no refresh needed)
- Available for all dims except for Period and Year
- The Catch!
  - Only available in initialized module applications such as Oracle Hyperion Workforce Planning, Oracle Hyperion Public Sector Planning and Budgeting, Oracle Hyperion Capital Asset Planning, and Oracle Project Financial Planning
End User Preferences

- End User Preference – Alias override allows users to override alias displays for all areas of the application

- Users can choose one of the following in preferences:
  - Default (determined by form, grid, or dimension settings)
  - Member Name
  - Alias
  - Member name: Alias
  - Alias: Member Name

- You can apply Member name and display options by Application defaults, Application settings, Dimensions, Forms, Member selections
Oracle Diagnostic Logging

- Oracle Diagnostic Logging – Enables app admins to configure logging parameters
  - Could for cloud folks who don’t have access to the server and log files
  - Can set different levels of debug
    - INCIDENT_ERROR:1 (SEVERE.intValue()+100), ERROR:1 (SEVERE), WARNING:1 (WARNING), NOTIFICATION:1 (INFO), NOTIFICATION:16 (CONFIG), TRACE:1 (FINE), TRACE:16 (FINER), TRACE:32 (FINEST)
- New parameters related to Calc Manager
  - BUSINESS_RULE_LAUNCH_LOG_ENABLED: Enables logging when Calc Manager business rules are run and checks whether the next two properties are set to true; default setting is true
  - BUSINESS_RULE_LAUNCH_LOG_RTP_VALUES: If set to true, runtime prompt values are logged; default setting is false
  - BUSINESS_RULE_LAUNCH_LOG_CALC_SCRIPT: If set to true, the calculation script sent to Essbase is logged; default setting is false
Grid Fetch Preferences

- Grid Fetch Preferences – Administrator and end users can pre-set the grid rendering preference
  - As you scroll the members / data is returned
  - Now you can define the number of rows and columns returned
Project Financial Planning

- Planning for contract, capital & indirect projects
- Expense planning at detail level
- Driver based overhead calculation for projects
- Periodic or milestone based revenue recognition
- Calculate impacts on Financial Statements
- Scoring, ranking & approving projects
- Funding requests & project approval flow
Propose New Contract Project Task List
What’s New in PFP 11.1.2.3?

- Calculate imported projects business rule
- Supports Earned Value Management
- What if capabilities
  - Set targets
  - Shift start and end dates and have data sift
- Revenue planning for Capital projects (once asset is in service)
What’s New in WFP & Capex 11.1.2.3?

- Take knowledge from PFP and include in other modules
- Add new job dimension
- Driver based calculations
- Take advantage of recent features
What’s New in Financial Close 11.1.2.3?

**BI / EPM Applications**
- Financial Close and Reporting
- Planning & Forecasting
- Strategy Management
- Profitability Management
- ERP Analytics
- CRM Analytics
- Industry Analytics

**BI / EPM Platform**
- Query & Analysis
- Interactive Dashboards
- Scorecards
- Reporting & Publishing
- Office Integration
- Search
- Detect & Alert
- Embedded
- Mobile

**Common Enterprise Information Model**
- BI Server
- Essbase
- Dimension Management
- Predictive Analytics

**Data Sources**
- OLTP & ODS Systems
- Data Warehouses
- Data Marts
- Exadata
- OLAP Sources
- Packaged Applications (Oracle, SAP, Others)
- Unstructured & Semi-Structured
- Excel XML/Office
- Business Processes

**OLTP & ODS**
- Systems
**Data Warehouses**
- Data Marts
**Exadata**
- OLAP Sources
**Packaged Applications**
- (Oracle, SAP, Others)
**Unstructured & Semi-Structured**
- Excel XML/Office
**Business Processes**
What was new 11.1.2.2 Financial Close and Reporting?

- Account Reconciliation Management (ARM) Module in HCM
- Configurable Dimensionality in HFM
- ADF Based UI Revamp – Very different look and feel for HFM
- "Extensive"/"Notable" HFM changes including new Forms Authoring Tool
- Oracle Financial Management Analytics – "Turn-key" solutions leveraging OBIEE
- HFM Starter Kits
What’s was new in Core FM 11.1.2.2?

- Configurable Dimensionality
- Financial Management Application Upgrade Utility Enhancements
- Financial Management Configuration Utility
- Rules
- User Interface Enhancements
- Extended Analytics
- Modifications to Win32 Components
What’s New in core FM 11.1.2.3?

- POV enhancements
- Admins can turn off modules for users
- Additional roles for task and data audit
- Expand UDA fields to 256 characters
- Support On-Demand Rules
- New HS.OpenCellTextUnit and HS.OpenCellTextUnitSorted functions
11.1.2.3 HFM POV Enhancements

- Show dimension member as label or description
- POV settings persist across modules
11.1.2.3 Web Form Enhancements

- Display selectable POV as favorites
11.1.2.3 HFM Web Form Enhancements

- Hide dimensions in POV
- Control dimension order display
- Options available as part of form definition
What’s New in HFM 11.1.2.3?

- Admins can turn off modules for all users if they aren't applicable.
### What was new in FDM 11.1.2.2?

<table>
<thead>
<tr>
<th>Feature</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expanded Source System Support</td>
<td>Fusion Accounting Hub 11.1.2, 11.1.3</td>
</tr>
<tr>
<td>Expanded Source System Support</td>
<td>JDEdwards EnterpriseOne 9.0</td>
</tr>
<tr>
<td>Expanded Source System Support</td>
<td>PeopleSoft HCM 9.1</td>
</tr>
<tr>
<td>Expanded Source System Support</td>
<td>PeopleSoft CC Ledger 9.1</td>
</tr>
<tr>
<td>Expanded Source System Support</td>
<td>SAP ECC 6.0 EHP3, R/3 4.7</td>
</tr>
<tr>
<td>Load Data to Account Recon Management Module</td>
<td></td>
</tr>
<tr>
<td>File based Data Loads</td>
<td></td>
</tr>
<tr>
<td>Support for LCM</td>
<td></td>
</tr>
<tr>
<td>Improved Diagnostics by leveraging Oracle Diagnostic Logging</td>
<td></td>
</tr>
</tbody>
</table>
What’s New in FDMEE 11.1.2.3?

- FDM and ERP Integrator combined into a single product
- Built on ERP Integrator platform
- Rebranded as FDM, Enterprise Edition
- Windows based FDM still available for existing customers
- 11.1.2.3 is the last release of FDM
- Migration to FDMEE required starting with 11.1.2.4
  - Additional license fee NOT required
  - New customers may only license FDMEE
- FDM Adapters - No change from today
- Full parity between FDM and FDMEE via a phased release approach
What’s New in Hyperion Close Management?

- Process Monitor (Dashboard Views)
- Active Calendar
- Task Management
- Account Reconciliation

New in 11.1.2.2
11.1.2.2 Account Reconciliation Manager

- Account Reconciliation Manager is a new module of Oracle Hyperion Financial Close Management
- Helps companies reduce risk by providing real-time visibility into the performance of account reconciliations
- Ensures that all reconciliations prepared are properly qualified
- Helps companies streamline and optimize performance by automating certain reconciliation tasks and supporting risk-based reconciliation cycles
Account Reconciliation Manager (ARM)

- Designed to manage global reconciliation processes
  - Balance Sheet
  - Consolidation system
  - Local GAAP
- For each process
  - Check completeness
  - Tracy assignments
  - Manage preparation & review
  - Identify risk conditions
  - Optimize overall process
What’s New in ARM11.1.2.3?

- Net Activity Attribute from Prior Reconciliation
- Hide Checkbox Options on Formats
- Frequency Relationship
- Enhanced Data Load Options
- Add Scheduling Option to Data Load
- Edit Currency UI
- Extension to Auto Reconciliation
What’s New in ARM11.1.2.3?

- Advanced User Assignments
- Summary Reconciliations
What was new in OFMA 11.1.2.2?

The product itself - OBIEE-based dashboards for consolidated financial data and close process metrics

Direct, native access to data in Oracle Hyperion Financial Management

Direct, native access to data in Oracle Hyperion Financial Close Management

Enables mobile delivery of EPM data finance executives and business users
What’s New in core OFMA11.1.2.3?

- ARM Analytics
- FDM Analytics
- Improved Usability/Visualizations
- Config utility improvements - Multi Product support (FCM, ARM)
- Config utility improvements - Enhanced search and member function capabilities
- Support for non windows platform
What was new in Disclosure Management 11.1.2.2?

- Output Formats - EDGAR HTML generation
- Output Formats - PDF report generation
- Detailed Mapping Review
- Duplicate Mapping Review
- Negative Values Review
- Variables for cross-footing, shared text, directional words, automated Table of Contents
- Report Manager enhancements
What’s New in DM 11.1.2.3?

- New Typed Dimension
- New Publish option to generate a copy of the current document without Oracle DM metadata
- New filter selection on the Review tab
- New Locate option on the reference tab
- Enhanced Dimension Members dialog
What’s New in 11.1.2.3? Hyperion Tax Provisioning

- Tax provisioning solution built on the Hyperion Financial close Solution Suite
  - Data Collection, Tax Provision Calculation, Consolidation & Tax Reporting
  - Global: Federal, State/Provincial & International
  - Addressing IFRS (IAS12) & US GAAP (ASC740)
- Integrates with tax compliance systems
Benefits of the New Hyperion Tax Provisioning

- Leverage same data assurance processes as close
- Use same chart of accounts and legal entity hierarchies
- Automate up to 70% of the tax provision from HFM/ERP
- Stronger internal controls
- Leverage easy to use, fast reporting and analysis tools
  - Smart view
  - Financial Reporting
  - Drill through to GL (FDMEE)
  - Dashboards via OBIEE
What’s New in Profitability Management 11.1.2.3?

BI / EPM Applications
- Planning & Forecasting
- Strategy Management
- Profitability Management
- ERP Analytics
- CRM Analytics
- Industry Analytics

BI/EPM Platform
- BI Server
- Essbase
- Dimension Management
- Predictive Analytics

Common Enterprise Information Model
- Query & Analysis
- Interactive Dashboards
- Scorecards
- Reporting & Publishing
- Office Integration
- Search
- Detect & Alert
- Embedded
- Mobile

Data Sources
- OLTP & ODS Systems
- Data Warehouses
- Data Marts
- Exadata Sources
- OLAP Sources
- Packaged Applications (Oracle, SAP, Others)
- Unstructured & Semi-Structured
- Excel XML/Office
- Business Processes

BI/EPM
- OLTP & ODS Systems
- Data Warehouses
- Data Marts
- Exadata Sources
- OLAP Sources
- Packaged Applications (Oracle, SAP, Others)
- Unstructured & Semi-Structured
- Excel XML/Office
- Business Processes
What was New in HPCM 11.1.2.2?

- New Oracle Hyperion Profitability and Cost Management Accessibility Guide
- Detailed Profitability
- Validating and Calculating Detailed Profitability
- Working with the Model Summary
- Model Data Registration
- Managing Detailed Profitability Stages
- Managing Detailed Profitability Allocations
- Bulk Edits
- EPMADetailed Profitability Validations
- Job Library
- Documentation Changes
- External Automation of Profitability and Cost Management Processes
- New Web Services Operations for Release 11.1.2.2
- Sample Client and Readme
What was New in HPCM 11.1.2.2.350?

- Smart View Queries supported against calculating and reporting databases for analysis & data entry (for calc. db)
- HPCM Application Manager – alternative to EPMA for app building (uses Essbase to manage dimensions)
- Outline Builder (Cube Generator) – enable the deployment of very large models from HPCM to Essbase
What’s New HPCM 11.1.2.3?

- Calculation Rules for Detailed Probability
- Enable OLAP Analysis for Detail Probability
  - Can now deploy to 3 Essbase db and then transfer their data to relational tables
- Destination Stage Balancing for Detailed Probability
  - Provides details of the impact of calculations on the destination stage data
- Performance improvements for standard models
Top down approach

Super set of calc artifacts, sources, destinations & drivers

More powerful way to design models

Replaces current source based definition (mostly)
  - Current single source model will be used for exceptions

Allows definition of assignment logic for groups of sources at once

Self Documenting

Benefits
  - Models should be easier to create and maintain
  - Performs better / Faster calc times
3 New ASO Databases Generated for Model

- Source Stage – include source balancing measures
- Contribution Detail – Stage 1-2 links
- Destination Stage
One Click to Report / Smart View Integration

- Prebuilt Smart View queries (behind scenes) to drill further into data (e.g. from the Stage Balancing screen)

Click through data point hyperlinks to analysis ready spreadsheet in Smart View
Query Designer in HPCM / Smart View Integration

- Help quickly set up the queries and the POV to get to the data sooner
- Wizard guides through the process – asking them about what types of analysis are they wanting to perform?
- Default layout provided based on answers and make default selections for dimensions (e.g. ‘Nomember’ combinations are selected by default)
What’s New in Strategy Management 11.1.2.3?

BI / EPM Applications
- Planning & Forecasting
- Financial Close and Reporting
- Strategy Management
- Profitability Management
- ERP Analytics
- CRM Analytics
- Industry Analytics

BI/EPM Platform
- Query & Analysis
- Interactive Dashboards
- Scorecards
- Reporting & Publishing
- Office Integration
- Search
- Detect & Alert
- Embedded
- Mobile

Common Enterprise Information Model
- BI Server
- Essbase
- Dimension Management
- Predictive Analytics

Data Sources
- OLTP & ODS Systems
- Data Warehouses
- Exadata Sources
- OLAP Sources
- Packaged Applications (Oracle, SAP, Others)
- Unstructured & Semi-Structured
- Excel XML/Office
- Business Processes

BI/EPM Platform
- OLTP & ODS Systems
- Data Warehouses
- Exadata
- OLAP Sources
- Packaged Applications (Oracle, SAP, Others)
- Unstructured & Semi-Structured
- Excel XML/Office
- Business Processes
What was new in HSF 11.1.2.2 / .300?

- Support for Smart View
- 64 bit server support
- Stabilization
- Performance Improvements
- Usability Enhancements
- Remove 255 Time Period Limit
- Check out / open Entity from Consolidation structure
What's New HSF 11.1.2.3? – Extended Smart View
Support for:

- Entity Change Management
- Assumption Change Management
- Change Fiscal Year End
- Actual Periods and Deal Periods
- Copy Local file to Server
- Depreciation Scheduler
- Debt Scheduler
What’s New HSF 11.1.2.3? – Extended Smart View Support for:

- Entity Structures
- User Preferences
- Global Assumptions (Server side only)
- Create New Templates and Entities in Smart View
- Offline and Local consolidation
- MS Office 2010 64-bit support
What’s New FR 11.1.2.3?

- Mobile Support
- Improved FR Function Grid Support for Word/Excel – Formatting retained
- Annotation Activity Logging
- Book Enhancements – Cover page, embed documents
- Authoring Enhancements
- Control Query Ready Link
11.1.2.3 Mobile Support for Financial Reporting

- View and interact with FR reports and books on mobile device
- Apple (iPhone and iPad): iOS5 and iOS6
- Android (phone or tablet): 3.x and 4.x
- Utilizes the device’s default web browser (No separate app to download)
What’s New in FR 11.1.2.3?

- Books have been enhanced to allow cover pages before the table of contents, embedding (and launching) Word DOCs from an HTML book, and changing the starting page number of books.
What’s New in Smart View 11.1.2.3?

BI / EPM Applications
- Planning & Forecasting
- Strategy Management
- Profitability Management
- ERP Analytics
- CRM Analytics
- Industry Analytics

BI/EPM Platform
- Query & Analysis
- Interactive Dashboards
- Scorecards
- Reporting & Publishing
- Office Integration
- Search
- Detect & Alert
- Embedded
- Mobile

Common Enterprise Information Model
- BI Server
- Essbase
- Dimension Management
- Predictive Analytics

Data Sources
- OLTP & ODS Systems
- Data Warehouses
- Data Marts
- Exadata
- OLAP Sources
- Packaged Applications (Oracle, SAP, Others)
- Unstructured & Semi-Structured
- Excel XML/Office
- Business Processes

What's New in Smart View 11.1.2.3?
What was new in Smart View 11.1.2.2?

- Smart Query
- Support for 64-bit Microsoft Office 2010
- New Extensions
- Excel Formatting Enhancements
- Planning Enhancements
- Financial Management Configurable Dimensionality
- New VBA Functions
- Logging Levels
- New Panel & Connection buttons on the Smart View ribbon
What’s New in Smart View 11.1.2.3?

- OBIEE & HSF support
- Planning Composite Form and Chart Support
- Update dimensions and members for Planning from SV
- Performance & Scale Improvements
- Improved formatting retention for FR grids
- Table of Contents
- Improved ad hoc for all providers
11.1.2.3 Improved FR Support for Smart View

- Improved Function Grid for FR import into Word and Excel
- FR formatting remains on the Function Grid
- Function grid can accommodate changes in the FR report (e.g. new or removed rows and columns)
What’s New in DRM 11.1.2.3?

BI / EPM Applications
- Planning & Forecasting
- Financial Close and Reporting
- Strategy Management
- Profitability Management
- ERP Analytics
- CRM Analytics
- Industry Analytics

BI/EPM Platform
- Query & Analysis
- Interactive Dashboards
- Scorecards
- Reporting & Publishing
- Office Integration
- Search
- Detect & Alert
- Embedded
- Mobile

Common Enterprise Information Model
- BI Server
- Essbase
- Dimension Management
- Predictive Analytics

Data Sources
- OLTP & ODS Systems
- Data Warehouses
- Data Marts
- Exadata
- OLAP Sources
- Packaged Applications (Oracle, SAP, Others)
- Unstructured & Semi-Structured
- Excel XML/Office
- Business Processes

OLTP & ODS
- Systems

Data Warehouses
- Data Marts

Essbase

OLAP Sources

Packaged Applications
(Oracle, SAP, Others)

Exadata

Unstructured & Semi-Structured

Excel XML/Office

Business Processes
What’s New in DRM 11.1.2.0?

- Full feature web client
- Internationalization (Unicode)
- Role based user access (e.g. Workflow User, Data Manager, Access Manager)
- Multiple applications per server
- Validations in real-time and batch
- Improved navigation for large flat hierarchies
- 64 bit support
- External connections
What was new in DRM 11.1.2.2?

- EPMA can import hierarchies, nodes and properties directly from DRM
- Version Variables
- Version Backup and Restore
- Hierarchy Group Properties
- Domain Membership for Nodes
- Copying Nodes and Properties across versions
- Navigation to Hierarchy and node via URL
- Hyperlink enabled properties
- Batch validations for exports
- Record ID for exports
- Formula based validations
- New Formula Functions
- Property Type Modification for Saved Property Defn
- UI Localization
- Expanded Character Encodings
What’s New in DRM 11.1.2.3?

- Data Governance module in DRM
- Import hierarchy from relational table
- Dynamic scripting for formulas
- Object Access Groups
- Hierarchy Constraints for Node Properties
- Job Management
What’s New in DRM 11.1.2.3? - Data Relationship Governance

- New module within DRM
- Adds workflow to DRM (RACI type functionality)
- Data stewards can coordinate entry, validation, and approval of hierarchies but it does a lot more too
- Users can request hierarchy changes and they go into a worklist so nothing gets lost
- Built-in alerts for when users have requested changes and it also sends e-mails when something has been sent to you
Workflow Requests

- Used to initiate changes or corrections to be completed, approved, enriched, and committed by other users using governance workflows.
A central location for interacting with change and remediation requests

From the Worklist, governance users may submit change requests or review and participate in requests assigned to their user group
Alerts and Notifications

- Provides DRM alerts and email notifications to governance users and data managers for requests to which they are associated.
- The configuration of stages for the workflow model for a request controls whether users are notified of activities taking place in a particular stage and which users get notified.
Workflow Path

- Identifies the stages of workflow to be completed for a request, the active stage for the request, the completion status of previous stages, and the approval count for the active stage.
- Enables participating users to understand how long a request may take, how many approvals may be involved, and where a request is positioned in the overall approval process.
Workflow Tags

- Allows governance users to assign a due date for completion of a request and to mark the request as urgent.
Other New 11.1.2.3 DRM Features

- Dynamic scripting lets you use JavaScript instead of formulas to create derived properties and validations.
- You can now connect directly to external relational database tables to import hierarchies.
- Object Access Groups to help manage metadata objects by a group of users.
- Hierarchy Constraints for Node Properties – limit the hierarchies and nodes available for view and selection when updating a node data type property value.
- Job Management – helpful for long running jobs; can jump to other task while job runs.
Documentation files for Release 11.1.2.3 are now available in two mobile formats
- MOBI files, available previously
- EPUB files
  - Oracle Enterprise Performance Management System EPUB documentation files are supported on all Apple Mobile devices (iPad, iPhone, and iPod Touch)
  - ePUB files are supported on many mobile devices; however, they are certified only on Apple Mobile devices
  - Additional devices will be certified over time
Supported Paths to 11.1.2.3

- **REMEMBER**: 11.1.1.x drops off full support in July 2013
- You can upgrade to 11.1.2.3 directly only from 11.1.1.4 and 11.1.2.x. Earlier versions require going to either 11.1.1.4 or 11.1.2.2 first.
- 11.1.2.3 still doesn't officially support Chrome or Safari. The documentation says that Oracle recommends IE (Internet Explorer) 9 or Firefox 10 because older versions are slower.
- The EPM documentation is now fully supported on Apple mobile devices (in ePub format).

Can I partially upgrade?
- If you look at the support matrix, in most cases no…
The Future

- Analytics driven Performance Management
- Continued optimization of EPM on Exalytics
- Mobile and social experience for EPM
  - 1. Information consumption
  - 2. Approvals & Workflow
  - 3. Data entry & updates
- Leverage Endeca technology for EPM
- EPM Cloud services
  - Planning here today
  - Next Financial Reporting
- Continued functional improvements
  - E.g. DRM integration with EPM via FDM EE,
  - Data sync with FDM EE, charting in FR
- More packaged content
Where to Find More Information?

Information Portal
Documentation Library & Mobile Content
Cumulative Feature Overview Tool

White Papers
Defects Fixed Finder Tool
What's New in Oracle EPM Hyperion 11.1.2.3

Edward Roske
info@interrel.com
LookSmarter.BlogSpot.com
@ERoske