

EPMware Streamlines FTSE 250 OneStream Adoption

EPMWARE

Background

When a leading UK-based broker-dealer decided to implement the performance management solution OneStream, its goal was to reduce complexity and simplify business process by creating a unified CPM solution.

However, before the company could realize the benefits of OneStream's financial consolidation, reporting, and budgeting capabilities, it first had to navigate significant integration and data management challenges.

This FTSE 250 constituent initially relied on various Oracle Hyperion products as its baseline, including using Oracle EBS for enterprise resource planning (ERP) and Oracle DRM to manage metadata across its Hyperion applications.

When the company decided to replace the bulk of its Hyperion applications with

Key results:

- ✓ Replaced the client's Oracle DRM platform with a unified metadata management and data governance solution.
- ✓ Created a central master data repository for alignment of metadata changes to OneStream and EBS.
- ✓ Implemented a seamless integration to EBS and OneStream to eliminate manual flat-file metadata changes while supporting the Extensible Dimensionality model.

OneStream, it found that it would be both cost-prohibitive and operationally inefficient to continue using the current DRM instance, so the company began looking for an alternative solution.

EPMware's unified metadata management and data governance solution was a logical choice for the client thanks to its real-time validation capabilities, one-click metadata deployment, and plug-and-play adapters for OneStream and Oracle EBS.

The Problem

Manual metadata management can't keep up with today's enterprises.

Data dominates our business environments, which makes managing metadata changes manually across multiple business applications not only inefficient but also potentially catastrophic to financial reporting accuracy.

Before implementing OneStream and partnering with EPMware, this broker-dealer didn't have a reliable, automated process to capture and validate metadata change requests. Instead, business users would submit changes to administrators, who would wait for approvals before manually making the requested changes in EBS and any other target application.

This time-consuming, error-prone process was particularly problematic for keeping the company's user acceptance testing (UAT) environment metadata in sync with the production environment.

Additionally, an Oracle DRM 11.2 update deprecated the integrations API, which disabled automation functionality when the company upgraded to Hyperion On-Premises 11.2.x.



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The Solution

EPMware increases visibility and streamlines changes across OneStream and Oracle EBS.

The EPMware platform was designed to give business users the ability to create metadata using a visual production reporting view, with workflows and validations, and then directly deploy that metadata to target applications.

The client brought in EPMware during the OneStream migration to take advantage of these capabilities and establish a synchronized, centralized metadata repository for OneStream and EBS from the start.

EPMware's dimension mapping allowed standardization and rationalization of the client's metadata and ensured key dimensions in both of these applications stayed in sync, including:



Cost Centers Dimension: When a member is created in the EBS cost center hierarchy, the OneStream Cost Center and alternate hierarchy dimensions receive the same change, keeping the alias and member name synchronized.



Alternate Hierarchy Dimension: Admins can create a new member in EBS, then use 10 custom properties configured as checkboxes to automatically create members to alternate hierarchies. EPMware validations ensure that only one shared instance is populated to each alternate hierarchy to prevent duplication.

These derived members and properties followed common manual metadata creation and validation. Automating these tasks eliminated days of manual effort and ensured the accuracy that the business teams were accustomed to.

The Results

Code-free integration and real-time validation cut time and costs.

EPMware joined the client team toward the end of its OneStream implementation. Within weeks, the platform was up and running and delivering value.

Ease of Integration

EPMware has a built-in EPMware-to-EBS adapter that pushes metadata to the ERP. This was a significant feature for the client because most solutions don't use a centralized metadata system to push ERP and ERP hierarchy changes.

EPMware has built-in integrations with OneStream, so there was no need for the client to customize the solution to house the OneStream Extensible Dimensionality hierarchy. EPMware was able to import the OneStream Extensible Dimensionality data model by simply importing a OneStream XML metadata-export file.

Real-Time Validation

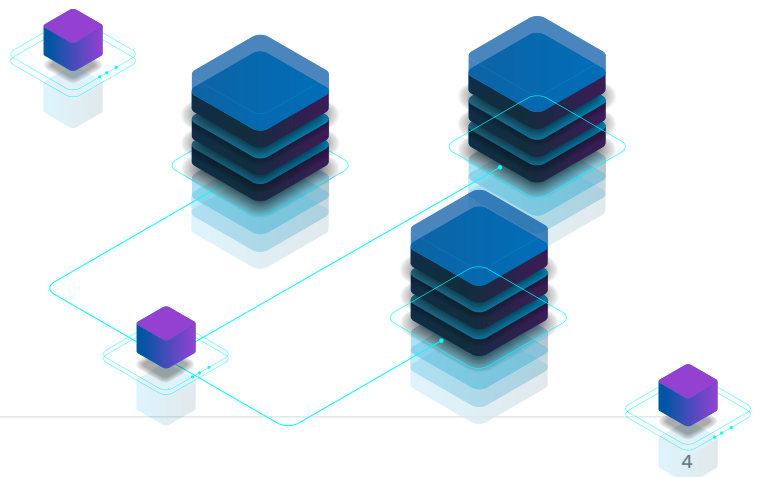
Creating validations between OneStream and EBS saved the client time by eliminating the need to manually sync metadata between applications.

EPMware reduces the need for touchpoints in both applications, putting metadata in one centralized location so users can visualize and confirm a change to all subscribing applications before releasing it.

EPMware also added a series of governance validations that enforce business rules (e.g., member naming conventions) and synced them across EBS and OneStream so that the metadata is clean going forward. Think of this as an ongoing metadata rationalization process.

Cost Savings

EPMware stands out in the market not only for its unique combined metadata management and data governance platform but also for its pricing structure. Unlike Oracle Hyperion DRM—which must be purchased individually and is priced per record—EPMware's enterprise subscription model includes metadata management, data governance, and out-of-the-box integration with the most popular EPM, CPM, and ERP technologies without a per-record licensing model.



About EPMware

EPMware stands out in the marketplace by combining metadata management and data governance capabilities in a single, intuitive platform. EPMware has built-in application intelligence, making managing hierarchies and data governance seamless and creating dimensional consistency across all subscribing applications.

Contact us to learn how EPMware empowers business users to take control of their metadata to drive innovation and successful business outcomes.

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