

# Oracle Data Relationship Governance

**ORACLE**

**ENTERPRISE PERFORMANCE  
MANAGEMENT SYSTEM**

## KEY BUSINESS BENEFITS

- Improves the quality of master reference data, which in turn fuels business process performance gains
- Stimulates collaboration between business & IT to ferret out data issues and resolve them proactively
- Fully transparent activity trail enables regulatory compliance and risk mitigation
- Lowers total cost of ownership versus external BPM platforms through greater leverage and reuse of Oracle Data Relationship Management metadata

Agile, real-time enterprises need the ability to capture business changes and apply them with consistency and accuracy across transactional and analytical system silos. Oracle Data Relationship Governance provides the change management and data quality remediation workflows essential for front-line business users, subject matter experts and signing authorities. It enables them to collaboratively create, correct and conform master reference entities, attributes, relationships and mappings so that they are fit for many alternate business purposes yet bound together by referential integrity. This ensures data quality, policy compliance, repeatable business processes, cross-functional collaboration and change awareness throughout the enterprise.

Data governance represents the convergence of data quality, data management, data policies, business process management, and risk management functions surrounding the handling of information as an asset within the enterprise. Through data governance, organizations can exercise positive control over the processes and methods used by their data custodians to handle change management of enterprise information such as master data, enterprise dimensions, hierarchies, relationships, associated attributes and mappings.

## Collaborative Workflows Enable Change Management & Data Remediation

Oracle Data Relationship Governance is a fully configurable, collaborative business application that automates change request approval and data remediation workflows between front-line business users, subject matter experts, signing authorities and data stewards. Along with Oracle Data Relationship Management, the Oracle Data Relationship Governance module addresses the governance challenge in two critical ways:

- It enables the organization to configure change request management processes that allow front-line business users—in different lines of business, divisions, and geographies—to contribute towards the creation, management, and automation of processes associated with authoring and managing changes to master data. Signing authorities may be engaged as reviewers and approvers of changes while subject matter experts can address adjacencies by providing contextual enrichment to ensure acceptance by consuming applications, organizations and business processes.
- It allows data stewards to enforce business policies, rules and validations that govern information quality to identify issues—missing, erroneous or non-standard information—and resolve them collaboratively by spawning tasks for stakeholders

## KEY FEATURES

- Governance Work List
- Change management and data quality remediation workflows
- Single-item or multi-item requests
- Split or skip workflows based on conditional stages
- Load request items from files
- Pre-validate each request stage by enforcing business policies with rules
- Auto-generate attributes by calculating inherited and derived values
- Automate task assignment based on role: who is responsible, accountable, consulted or informed (R-A-C-I model)
- Comments and attachments
- Alerts and email notifications
- Audit request activity history
- Approve requests via mobile iOS & Android native applications

within the organization who are best able to fix or address the issues based on subject matter expertise.

ID	Title	Model	Status	Age (Days)	Stage	Claimed By	Urgent	Overdue
43	Compensation Expenses	New Financial Account	Claimed	2	Update Financial Account	James Cooper		
21	1200	Add a New BS Account	Draft	0	AddNewAccount			

#	Name	Description	Hierarchy	Task	Action
1	6200	Vacation Paid	Parent Total	Add Financial Account	
2	6300	Employee Benefits	Parent Total	Add Financial Account	

Figure1: The Oracle Data Relationship Governance Work List

## Governance Work List

The Governance Work List is a central launch pad that enables business users to access and act on change requests or remediation requests that may either be claimed by them or have been assigned to them. From the work list, governance users may submit change requests or review and participate in requests assigned to their user group. Work list filters enable governance users to quickly identify relevant subsets based on context such as requests: assigned, claimed, drafted, submitted, overdue, urgent, etc., and further filter them by age.

## Workflow Requests

Workflow requests enable both change requests as well as remediation requests and are used to initiate data creation, propose changes or request resolution from authorized data providers, approvers, enrichers or subject matter experts using governance workflows. Requests may be configured using templates that either support simple single-item changes or more complex sets of changes containing multiple items that must be reviewed, approved and committed together or not at all. Requestors can author new items piecemeal or load from a file source. When changes are presented to a workflow user, one is able to quickly identify current versus changed details for existing items. Users may either enter information manually, or calculate values based upon defaults, inheritance or formulas built configured within Oracle Data Relationship Management.

## Alerts and Notifications

Web application alerts and email notifications are provided to governance users and data managers for requests with which they are associated. The subject of each email indicates the request and the activity that took place. In the body of the email, users can view the request header, request items, and recent request activities. A hyperlink to

request details is included to simplify navigation and encourage prompt action.

## Request Activity and History

All activities taking place for a request are recorded in the request activity trail. These activities include user activities such as submitting, approving, and enriching requests and system initiated activities such as assigning and committing requests. User comments are also recorded as request activities to provide temporal context. For each change committed to a target version within Oracle Data Relationship Management (DRM), a request identifier is captured as part of its transaction history to further enrich the audit trail.

## Fully Configurable Workflow Model

Oracle Data Relationship Governance is administered to deliver configuration based governance workflows based upon a workflow model. The model consists of four key components: the workflow stages to be completed, tasks to be performed within each stage, user groups along with their respective privilege assignments, as well as model filters to specify the target version, hierarchy and entity type for which a change is intended.

Each workflow model may be configured to consist of multiple stages. Each stage can have one or more tasks for authorized users to select based upon business purpose. Attributes exposed within each task form can be read-only or editable, and can be marked as mandatory. The configuration of each task determines which users get notified via web alerts and email notifications.

User groups are provisioned the authority to submit, approve, enrich, commit or be notified on each request. The actions that can be performed by each participating user will vary depending on the stage to which they are participating and their permissions to the data referred to by the request items.

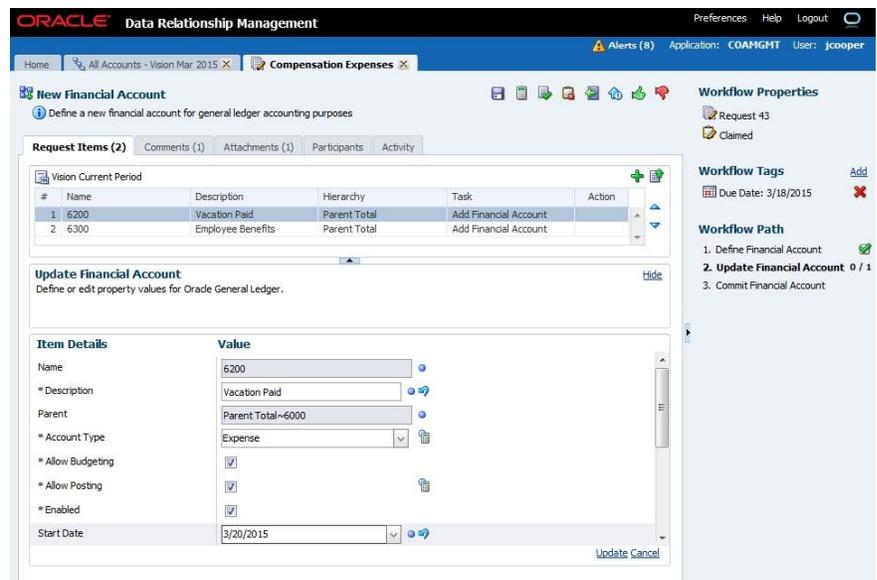


Figure 2: The Oracle Data Relationship Governance Request Experience

## Process Control and Automation

### Workflow Paths and Workflow Tags

The workflow path identifies stages of workflow to be completed for a given request, the active stage for an in-flight request, the completion status of previous stages, and the approval count expected for the active stage. The workflow path 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 scheme of a governance process. This path is constantly being recalculated as a user performs actions such as submit, approve, enrich, push back, or reject a request.

Workflow tags allow governance users to assign a due date for completion of a request or to mark a request as urgent. Establishing a due date governs the duration of each request stage and ensures that requests previously claimed by a governance user that have exceeded their stage duration may be delegated to others within the user group.

### Request Assignment, Claim Duration and Delegation

Oracle Data Relationship Governance enables request assignment based upon a claim model, not unlike trouble ticketing solutions. Requests are added to a user's work list based upon user group assignment associated with a request stage; however, a request must explicitly be claimed by the user to complete the tasks assigned to a stage. Multiple users may have access to a request in a given stage. Based upon the approval method configured for a stage, any or all users within the assigned user group may be required to complete the stage.

Request duration may be configured to specify the number of days a request should take to be approved and committed. When the age of a request exceeds request duration, it is marked as overdue. Similarly, claim duration may also be specified. When request age exceeds claim duration, the request is automatically unclaimed and made available to other assigned users to claim. This approach may be used to build delegation rules into each governance workflow.

### Conditional Stages

A stage may be invoked conditionally based upon configurable criteria that either match an attribute value or conform to a business rule. Only those authorized to perform a workflow stage can access relevant request items for enrichment and approval. Complex requests with several request items may be split into separate requests using conditional stages to contextually tailor workflow experiences to submitted request items.

### Skipping Stages and Automatic Escalation

Conditional workflows permit a workflow stage to be skipped if all required values are already provided and all validations for the stage pass successfully. The ability to skip entire stages enables the workflow model to dynamically adapt workflow paths to only those stages necessary to be completed based on the actual items in a request.

### Re-approval

When a request is pushed back to a previous stage that has already been completed and approved the request may need to be resubmitted or re-approved by users who

have already participated. Depending on which stage the request is pushed back to, re-approval by subsequent stages may be required or optional.

## Compliance with Policies and Standards

### Separation of Duties

Enterprises often require workflows to follow the 'four-eyes' or 'two-person' principle, which states that two individuals must approve an action before it can be taken. Workflow stages may be configured to require a separate approving user who has not submitted or approved any prior request stage. With 'separation of duties' enabled, approvers in a stage cannot be participants of any other stage in the request. Similarly, to ensure objectivity, signing authorities may not submit change requests that they can self-approve.

### Request Auditing

Each committed request is recorded as part of the DRM transaction history. The final approver for a committed request is recorded in the transaction history as an authorized user. Transaction detail provides audit trail for each transaction including users responsible and accountable for the change, 'from' and 'to' values of the requested change, with timestamps.

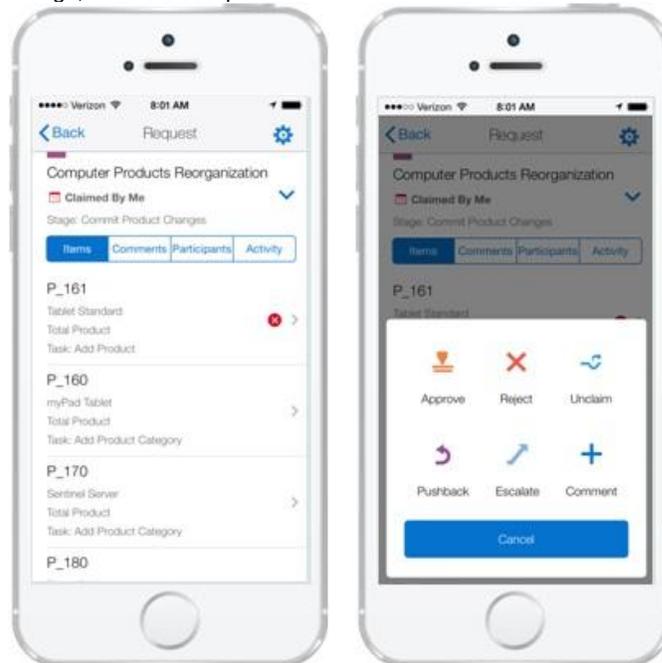


Figure 3: The Oracle Data Relationship Governance Mobile Approvals Experience

## Governance on-the-go: Mobile Approvals

The Oracle Data Relationship Governance application on Oracle EPM Mobile, a native mobile application available on both iOS and Android platforms, enables participants to access their entire work list on-the-go. Users may review request details, approve or reject open requests, push them back to prior participants, comment on in-flight requests or email participants to progress data governance workflows directly from their smartphones.

## ORACLE ENTERPRISE PERFORMANCE MANAGEMENT APPLICATIONS

Oracle enterprise performance management applications are an integrated, modular suite that supports a broad range of strategic and financial performance management processes and helps unlock business potential.

### RELATED PRODUCTS

Oracle enterprise performance management applications provide the following capabilities:

- Strategy Management
- Financial Close and Reporting
- Planning, Budgeting and Forecasting
- Profitability and Cost Management
- Enterprise Data Governance

## Low Total Cost of Ownership: Easy to Configure, Deploy, and Extend

Oracle Data Relationship Governance has been designed with a strong focus on total cost of ownership. With Oracle Data Relationship Management (DRM) as its prerequisite, this application reuses the underlying information model to enable administrators to design once and reuse in both applications the entity model, attributes, business rules and validations, data access policies, users and user provisioning methods. The administration of governance workflows extends existing metaphors familiar to DRM administrators and provides a frictionless approach to existing customers to layer this new application on top existing investments in Oracle Data Relationship Management. A governance user role has been created specifically to authorize access to the Oracle Data Relationship Governance application.



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