

Integrating Data in Cloud EPM LVC

Oracle Enterprise Performance Management Cloud

DURATION

2 Days

MODULES

12 Lectures

COURSE CODE

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Course Overview

This course is designed to teach you how to use Data Integration to copy or move data between Cloud EPM business processes and third-party solutions. With Data Integration, you can build, manage, and run Oracle Fusion Cloud Enterprise Performance Management (EPM) integrations. Learn how to set up a Drill-Through from Cloud EPM to source systems, including on-premises. You'll also learn how to set up file-based and direct integration sources, create mapping rules to translate source data into the required target format, and execute and manage the periodic data loading process. Common integration tasks are done using an easy-to-navigate interface that supports and conforms to how you work.

What You Will Learn

Introduction to Data Integration

- Course Objectives
- Agenda
- Lesson Objectives
- About Data Integration
- About EPM Integration Agent
- Data Integration Workflow
- Data Integration Use Case
- Navigating in Cloud EPM
- Managing Files in the File Browser
- Connecting Environments in Cloud EPM
- Summary

Configuring Source Connections

- Objectives
- About Source Connections
- Configuring an Oracle Cloud ERP Connection
- Configuring an Oracle Cloud HCM Connection
- Configuring a NetSuite Connection

- Summary

Registering Applications

- Objectives
- About Source and Target Applications
- Registering EPM Local Applications
- Registering EPM Cloud Applications
- Registering Data Source Applications
- Registering an On-Premises File
- Registering File Data Source Applications
- Registering an On-Premises Data Source Application
- Registering Applications for Loading Dimensions
- Registering a Data Export File Application
- Defining Application Dimension Details and Options
- Defining Application Details for Oracle ERP Data Sources
- Summary

Drilling Through to Source Systems

- Objectives
- Drill Through: Overview
- Setting Up Drill Through to a Landing Page
- Setting Up Drill Through Using a Custom URL
- Setting Up Direct Drill
- Defining a Drill Region
- Drilling Through in Forms
- Customizing the Landing Page View
- Summary

Managing Period and Category Mappings

- Objectives
- Period Mapping Overview
- Managing Period Mappings
- Period Mapping Options
- About Loading Multiperiod Data for EPM Cloud or File-Based Source Systems
- Category Mapping Overview
- Managing Category Mappings
- Summary

Creating Data Integrations

- Objectives
- Creating Integrations
- Quick Mode Considerations
- Creating File-Based Integrations
- Creating Direct Integrations

- Mapping Dimensions
- Mapping Members
- Setting General Integration Options
- Defining Target Options
- Defining Filters
- Defining a Clear Region
- Launching Business Rules in Planning Integrations
- Summary

Running Data Integrations

- Objectives
- Running an Integration
- Viewing Process Details
- Reviewing Data in the Workbench
- Summary

Running Jobs Using Pipelines

- Objectives
- About Pipelines
- About the Pipeline Workflow
- Defining Pipelines
- Adding Stages
- Adding Jobs
- Running Pipelines
- Summary

Integrating Data from Other Data Sources

- Objectives
- Integration Considerations
- Integrating with ERP Cloud
- Integrating with ERP Cloud – Tasks
- Integrating with ERP Cloud
- Integrating with HCM Cloud
- Integrating Cloud EPM Projects and Fusion Cloud Project Management
- Integrating Cloud EPM Financials Budget Revisions with Budgetary Control
- Integrating with JDE
- Integrating with SAP
- Loading and Calculating Incremental Workforce Data
- Loading Data to a FreeForm Application
- Oracle Integration Cloud
- Summary

Optimizing Performance

- Objectives

- Optimizing Integrations
- Analyzing Job Analysis Step 1: Stage and Load Data to the TDATESEG_T
- Table
- Step 2: Clean Up Prior Data Loads
- Step 3: Process Mapping Rules
- Step 4: Clean Up Prior Integrations in TDATESEG
- Step 5: Copy Mapping Results from TDATESEG_T to TDATESEG
- Step 6: Validate Mapping Results
- Step 7: Generate File and Load to Target
- Job Log Additional Considerations
- Tuning Considerations
- Additional Considerations
- Troubleshooting Data Integration Issues
- Summary

Loading Data and Metadata Using EPM Integration Agent

- Objectives
- Overview of the EPM Integration Agent
- Installing and Configuring the EPM Integration Agent
- Configuring and Starting the EPM Integration Agent
- Setting Startup Parameters
- Encrypting the Cloud EPM User Password
- Enabling OAuth 2.0
- Running the EPM Integration Agent as a Windows Service
- Starting the EPM Integration Agent from a Command-Line
- Running the EPM Integration Agent in Diagnostic Mode
- Configuring Synchronous Mode
- Connecting Cloud EPM to On-Premises Using EPM Integration Agent
- Extracting Data from On-Premises Data Sources
- Loading Data Using a SQL Query Definition
- About Prepackaged On-Premises Adapters
- Importing Data from a File in the EPM Integration Inbox
- Loading Data from an On-Premises File Data Source Using Agent File Adapter
- Performing a Quick Mode Load Using the EPM Integration Agent
- Writing Back Data with the EPM Integration Agent
- About Agent Clusters
- Scripting with Java, Jython, or Groovy
- Summary

Moving Data with Data Maps

- Objectives
- Data Maps: Overview
- Creating and Modifying Data Maps
- Viewing Data Maps
- Changing Mapping Information for a Dimension

- Excluding Members
- Managing Data Maps
- Validation Rules for Default Members
- Moving Data with Data Maps
- Configuring and Moving Data with Smart Push
- Transferring Data Across Applications with Smart Push
- Viewing the Smart Push Status
- Running Data Maps and Smart Push Processes Simultaneously
- Summary