

Oracle SmartView For Planning LVC

Oracle Enterprise Performance Management Cloud

DURATION

1 Days

MODULES

7 Lectures

COURSE CODE

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Course Overview

This comprehensive course covers Oracle SmartView For Planning. Gain the knowledge and skills needed to work effectively with Oracle Enterprise Performance Management Cloud technologies.

What You Will Learn

Introduction to Smart View

- Course Goals
- Objectives
- Oracle Cloud EPM Planning
- Smart View Overview
- Smart View Architecture
- Integration with Source Systems
- Smart View Business Process
- Smart View Business Scenario
- Summary
- Learning Activities

Navigating Smart View and Setting Options

- Objectives
- Smart View Excel Interface
- Connection Types
- Connecting to Data Sources
- Modifying Connections
- Setting Active Connection for a Sheet
- Viewing Planning Data in Excel
- Viewing Planning Data in Excel: Opening Forms
- Changing the POV
- Selecting Dynamic User Variables

- Floating Tool Bar
- Setting Smart View Options
- Setting Smart View Options: Global and Sheet-level Options
- Setting Smart View Options: Member Options
- Setting Smart View Options: Data Options
- Setting Smart View Options: Advanced Options
- Setting Smart View Options: Formatting Options
- Setting Smart View Options: Cell Styles
- Setting Smart View Options: Extensions
- Setting User Preferences
- Summary
- Learning Activities

Managing Data in Forms

- Objectives
- Working with Forms in Excel: Viewing Form Instructions
- Working with Forms in Excel: Copying and Pasting Data
- Working with Forms in Excel: Adjusting Data Values
- Working with Forms in Excel: Spreading Data for Time Periods
- Working with Forms in Excel: Spreading Data with Cell Locking
- Working with Forms in Excel: Spreading Data with Grid Spread
- Working with Forms in Excel: Spreading Data with Mass Allocate
- Working with Forms in Excel: Using Menus
- Annotating Data Cells: Adding Comments
- Annotating Data Cells: Attaching Documents
- Annotating Data Cells: Adding Supporting Details
- Reviewing Cell History
- Calculating Data Values: Viewing Member Formulas
- Calculating Data Values: Creating Formulas
- Calculating Data Values: Launching Business Rules
- Calculating Data Values: Monitoring Planning Jobs in Job Console
- Submitting Data
- Summary
- Learning Activities

Analyzing Data with Ad Hoc Analysis Tools

- Objectives
- Ad Hoc Analysis Overview
- Selecting Members
- Selecting POV Members
- Preserving Excel Formulas in Ad Hoc Grids
- Formatting Ad Hoc Grids: Smart View Formatting
- Formatting Ad Hoc Grids: Excel Formatting
- Adding Rows and Columns
- Zooming In and Out on Members

- Pivoting Members
- Keeping and Removing Members
- Performing Calculations Without Having to Submit Your Changes
- Working with Multiple Grids on a Worksheet
- Saving Ad Hoc Grids
- Cascading Reports
- Embedding Planning Data in Word and PowerPoint
- Summary
- Learning Activities

Managing the Approval Process

- Objectives
- Planning Approval Process Overview
- Viewing Planning Unit Details
- Viewing Promotional Paths
- Validating Planning Units
- Resolving Validation Errors
- Changing Planning Unit Statuses
- Annotating Planning Units
- Out of Office Assistant
- Summary
- Learning Activities

Completing and Managing Tasks Using EPM Task Manager

- Objectives
- Task Manager Overview
- Task Manager Terms
- Task Manager Roles
- Sample Task Flows
- Creating Connections to the Smart View Extensions
- Updating Tasks from Smart View
- Viewing Schedules and Tasks
- Claiming or Releasing Tasks
- Approving or Rejecting Tasks
- Submitting Tasks
- Summary
- Practices

Introduction to Predictive Planning

- Objectives
- Predictive Planning Overview
- Navigating in Predictive Planning: Starting Predictive Planning
- Navigating in Predictive Planning: Predictive Planning Ribbon
- Setting up Predictions
- Running Predictions

- Setting Predictive Planning Options
- Viewing Results in the Predictive Planning Panel
- Setting Chart Preferences
- Analyzing Results
- Summary
- Learning Activities