Manage & Govern Enterprise Data Assets with Enterprise Data Management Cloud LVC

Oracle Enterprise Performance Management Cloud

DURATION	MODULES	COURSE CODE
2 Days	**19 Lectures**	**—**

Course Overview

The course guides you through the enterprise data management process that includes implementation tasks, end-user tasks, and administrative tasks in Oracle Enterprise Data Management Cloud.

What You Will Learn

Introduction to Oracle Enterprise Data Management Cloud

- Objectives
- Enterprise Data Management Use Cases
- Enterprise Data Management Process
- Summary

Registering Applications

- Objectives
- Enterprise Data Management Applications
- Registering Applications
- Application Types
- Application Connections
- Defining Applications
- Completing Registration
- Application Registration Examples
- Summary

Understanding the Information Model

- Objectives
- Application Objects
- Application Objects: Additional Views

- Data Chain Objects: Node Type
- Data Chain Objects: Hierarchy Set
- Data Chain Objects: Node Set
- Data Chain Objects: Viewpoint
- Data Chains for Lists
- Data Chains for Hierarchies
- Lists and Hierarchies
- Properties
- Alternate Hierarchies and Top Nodes
- Shared Nodes
- Summary

Working with Enterprise Data Using Views

- Objectives
- Views
- Time Labels
- Viewpoints
- Duplicate Viewpoint Tabs
- Exploring and Managing Data
- Validating Data
- Comparing Data
- Compare Profiles
- Node Links in Viewpoint Comparisons
- Creating and Saving Compare Profiles
- Downloading Compare Results
- Inspecting Viewpoints
- Inspecting Viewpoints: General Tab
- Inspecting Viewpoints: Definition Tab
- Inspecting Viewpoints: Related Viewpoints
- Inspecting Viewpoints: Properties Tab
- Inspecting Viewpoints: Queries Tab
- Inspecting Viewpoints: Subscriptions Tab
- Inspecting Viewpoints: Lineage Tab
- Inspecting Viewpoints: Data Chain Tab
- Viewpoint Queries
- Defining Queries
- Private and Public Queries
- Promoting Queries
- Orphan Node Queries to Reconcile and Complete Hierarchies
- Downloading Viewpoints
- Summary

Changing Enterprise Data with Requests

- Objectives
- Using Requests to Change Data

- Changing Data
- Change Actions
- Model After Overview
- Adding a Node by Modeling After an Existing Node
- Considerations for Model After
- Creating a Node in the Same Viewpoint
- Visualizing Request Changes
- Working with the Node Clipboard
- Loading Request Items from a File
- Validating Requests
- Working with Request Comments
- Working with Request Attachments
- Request Actions
- Considerations for Assigning Requests
- Collaborating
- Considerations for Collaborating
- Setting Request Priority
- Submitting Requests
- Working with Request Activity
- Inspecting Requests
- Downloading Requests to Files
- Summary

Matching and Merging

- Objectives
- Matching and Merging
- Use Cases
- Process Overview
- Data Sources
- Creating Data Sources
- Matching Rules
- Creating Matching Rules
- Editing Matching Rules: General Parameters
- Match Scores Explained
- Editing Matching Rules: Definition Parameters
- Survivorship Rules
- Creating Survivorship Rules
- Editing Survivorship Rules: General Parameters
- Editing Survivorship Rules: Definition Parameters
- Creating a Change Request
- Creating and Running Matches
- Matching Workbench
- Accepting, Rejecting, or Skipping Match Results
- Applying or Discarding Changes from Match Results
- Selecting the Properties to Keep During a Merge

- Submitting the Change Request
- Summary

Creating Views and Viewpoints

- Objectives
- Creating Views
- Viewpoints Overview
- Alternate Viewpoints
- Related Viewpoints
- Example: Same Nodes
- Example: Different Nodes
- Example: Different Relationships
- Example: New Node Types
- Understanding Bindings and Bound Data Objects
- Binding Rules
- Binding Status
- Creating Viewpoints
- General Settings
- Defining the Viewpoint
- Property Groups
- Creating and Assigning Property Groups
- Setting Properties as Columns
- Copying Viewpoints
- Viewpoint Copy: Filtering
- Viewpoint Copy: What-if Scenarios
- Viewpoint Copy: Sandbox
- Time Labels
- Time-Labeled Viewpoints
- Creating a Time Label
- Working with Time-Labeled Viewpoints
- Archiving, Unarchiving, and Deleting Viewpoints
- Summary

Working with Properties

- Objectives
- Properties
- Property Data Types
- Property Origin
- Inherited Properties
- Derived Properties
- Derived and Stored Properties
- Sequence Properties
- Email and Hyperlink Subtypes for String Properties
- Node List Data Type Properties
- Defining Allowed Values for a Property

- Defining Invalid Values for a Property
- Configuring Properties for Viewpoints
- Downloading Property Definitions
- Summary

Building Expressions

- Objectives
- Expressions
- Expression Contexts
- Expression Terminology
- Defining Expressions in the Expression Builder
- Testing Expressions in the Expression Builder
- Copying and Pasting in Expressions
- Saving and Loading Expressions
- Calculating Name for Nodes Added to Viewpoints
- Example: Calculating Name Based on Sibling Name or Parent Name
- Calculating the Parent of a Node
- Example: Calculating the Parent of a Node
- Example: Loading a Request from File with Unknown Parent
- Best Practices for Building Expressions
- Summary

Configuring Validations

- Objectives
- Validations and Constraints
- System Validations
- Predefined Validations
- Custom Validations
- Creating Custom Validations
- Configuring Custom Validations
- Request Validation Scope
- Validation Severity and Timing Execution
- Best Practices for Configuring Custom Validations
- Running Validations
- Running Selected Validations for Nodes
- Constraints
- Summary

Sharing Enterprise Data Across Applications

- Objectives
- Sharing Enterprise Data Across Applications
- Example: Sharing Enterprise Data Across Applications
- Example: Aligning Enterprise Data Across Applications
- Node Type Converters

- Converting Node Types
- Property Transformations
- Node Type Qualifiers
- Data Sources and Node Links
- Viewing Node Links
- Lookup Sets
- Lookup Dimensions
- Node Name Transformations
- Node Parent Transformations
- Example: Parent Transformation Part 1 – Adding Nodes
- Example: Parent Transformation Part 2 – Comparing Viewpoints
- Example: Parent Transformation Part 3 – Expression
- Example: Parent Transformation Part 4 – Result
- Aligning Nodes
- Aligning Relationships and Properties
- Summary

Synchronizing Data Across Applications

- Objectives
- Synchronizing Changes across Applications
- Change Management Architecture: Application Design Patterns
- Best Practices for Subscription Design
- Security Considerations
- Defining Subscriptions
- Defining Subscriptions: Definition
- Copy and Model After Operations in Subscriptions
- Defining Subscriptions: Filters
- Considerations for Name Transformations and Calculated Parent
- Considerations for Removes and Deletes
- Process Flow for Subscription Requests
- Example: Single Subscription Assignee for Request Items
- Example: Multiple Subscription Assignees for Request Items
- Example: Standalone Requests
- Top Node Filters for Subscriptions
- Working with Subscription Requests
- Taking Action on Assigned Requests
- Viewing Request Lineage
- Viewing Viewpoint Lineage
- Summary

Mapping Data Across Applications

- Objectives
- Mapping One Source to Multiple Targets
- Viewpoints for One Source to Multiple Target Applications
- Mapping Multiple Sources to a Single Target Application

- Mapping Hierarchies for Multiple Sources to Single Target
- Map Bindings and Mapping Data Chain
- Creating Map Bindings
- Mapping Nodes Interactively
- Mapping Nodes Interactively: Example
- Mapping Keys
- Example: Mapping Keys
- Special Use Cases for Mapping
- Implicit Data Maps for Oracle EPM Cloud
- Implicit Data Maps: How They Work
- Custom Data Sets for Mappings in Oracle Financials Cloud General Ledger
- Managing Mappings for a Chart of Accounts Redesign
- Configurations Using Legacy GL Node Types
- Creating Legacy GL Node Types
- Predefined Properties for Legacy GL Node Types
- Creating Map Bindings Using the Legacy GL Node Type
- Summary

Controlling User Access

- Objectives
- Security Levels
- Assigning Application Roles
- Data Security Explained
- Permissions and Permission Levels
- Inclusive and Additive Permissions
- Combining Inclusive and Additive Permissions
- Permissions and Data Access
- Assigning Permissions
- Configuring Data Access: Coarse Grain
- Configuring Data Access: Fine Grain
- Uploading and Downloading Node Type Permissions
- Tailoring the End User Experience
- Creating View Filters
- Configuring Allowed Actions and Property Settings for a Viewpoint
- Summary

Governing Data

- Objectives
- Governing Enterprise Data
- Governing Enterprise Data in Any Change Context
- Policies
- Where Policies Are Defined
- Use Cases for Fine-Grain Policies: Node Type
- Use Cases for Fine-Grain Policies: Hierarchy Set
- Policy Definition Level Example

- Policies and Permissions
- Request Workflow Stages
- Submit Stage
- Approve Stage
- Approve Stage: Recall, Reject, or Withdraw
- Commit Stage
- Comments and Attachments
- Disabling Request Workflow for Applications
- Blockout Periods
- Application and Dimension Blockout Periods
- Blockouts in Affected Viewpoints
- Recurring Blockout Periods
- System Settings for Requests
- Prevented Actions by Request Type
- Prevent Deletion of Submitted Requests
- Purge Completed Request Actions
- Delegating Users to Approve and Commit Requests
- Approval Methods
- Parallel Approval
- Serial Approval
- Ownership Approval
- Required Setup
- Ownership Approval Method Configuration
- Example: Dynamic Ownership Approvals
- Management Hierarchy Approval
- Management Hierarchy Approval: Fixed Fulfillment
- Management Hierarchy Approval: Variable Fulfillment
- Creating Policies
- Configuring Approval Policy Settings: Definition
- Configuring Approval Policies: Filters
- Configuring Commit Policies
- Configuring Notification Policies
- Policy Order Processing
- Policy Ordering Use Cases
- Viewing the Policy Execution Plan
- Viewing the Request Workflow
- Consolidation Requests: Governance in Multiple Rounds
- Consolidating Requests
- Escalation Management
- Escalation Examples
- Summary

Loading Data from External Applications

- Objectives
- Loading Enterprise Data from External Applications

- Comparison of Loading Methods
- Working with Dimension Imports
- Importing Dimensions
- Import Configuration
- Sources for Importing Data
- Import Modes
- System Process for Merge Imports
- Reviewing Import Status
- Viewing Imported Data
- Viewpoint Loads
- Working with Viewpoint Loads
- Viewpoint Loads Versus Imports
- Viewpoint Load Modes
- Default and Defined Loads
- Defined Load Columns
- Defined Load Options
- Defined Load Merge Options
- Load File Format
- Running Viewpoint Loads
- Summary

Distributing Data to External Applications

- Objectives
- Consuming Enterprise Data
- Consumers of Enterprise Data
- Comparison of Distribution Methods
- Exporting Dimensions and Mappings
- Exporting Dimensions to a Connection
- Export Order for Nodes and Relationships
- Exporting Mappings
- Considerations for Exporting Mappings
- Exporting to External Applications
- Exporting One Dimension to Multiple External Applications
- Global Connections
- Viewpoint Extracts
- Viewpoint Extracts Versus Dimension Exports
- Creating Extracts
- Full Extracts
- Configuring Full Extracts: General
- Configuring Full Extracts: Columns
- Configuring Full Extracts: Options – Filter Parameters
- Configuring Full Extracts: Options – File and Data Format
- Incremental Extracts
- Configuring Incremental Extracts: General
- Configuring Incremental Extracts: Columns

- Incremental Extracts: Compare and Output Settings
- Configuring Incremental Extracts: Incremental
- Configuring Incremental Extracts: Options
- Generational Extracts
- Configuring Generational Extracts: General
- Configuring Generational Extracts: Columns
- Configuring Generational Extracts: Generational
- Configuring Generational Extracts: Options
- Link Extracts
- Configuring Link Extracts: General
- Configuring Link Extracts: Columns
- Configuring Link Extracts: Link
- Configuring Link Extracts: Options
- Extract Visibility
- Copying Extracts
- Extract Packages
- Considerations for Extract Packages
- Combined Output Example: Reporting
- Combined Output Example: Integration
- Creating Extract Packages
- Configuring Extract Packages: General
- Configuring Extract Packages: Extracts
- Running Extracts and Extract Packages as Reports
- Running Extracts for Data Integration
- Running Extract Packages for Data Integration
- Summary

Reporting and Analysis

- Objectives
- Reporting and Analysis Overview
- Reports Overview
- Extracts Reports
- Viewpoint Extracts Report
- Extract Packages Report
- Permissions and Policies Reports
- Navigating Permissions and Policies Reports
- Filters in Permissions and Policies Reports
- Subscriptions Report
- Custom Validations Report
- System Activity Report
- Record Count Log Report
- Working with Dashboards
- Working with the Filter Bar
- Saving Filters and Adding Favorites
- Working with the Scoreboard

- Change Management Dashboard
- Performing System Audits
- Auditing Transaction History
- Auditing System Events
- Auditing Permissions
- Auditing Policies
- Auditing Properties
- Summary

System Administration

- Objectives
- Working with Templates
- Template Considerations
- Exporting to a Template
- Importing from a Template
- Life Cycle Management
- Automating Tasks Tools
- Summary