

(24B) Oracle Planning: Implementation LVC

Oracle Enterprise Performance Management Cloud

DURATION

4 Days

MODULES

21 Lectures

COURSE CODE

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Course Overview

This course is designed to teach you to create and administer Planning in Oracle EPM Cloud. You learn to add dimensions and members; import members; load data; set up security; create forms, dashboards, and infolets; manage business rules and groovy rules; manage approvals; and set up navigation flows. You learn to describe and configure Intelligent Performance Management (IPM) and get an overview of Planning Modules and FreeForm Applications. You also learn to design reports to analyze Planning data, and maintain your Planning environment.

What You Will Learn

Introduction to Planning

- Objectives
- Agenda: Day 1
- Agenda: Day 2
- Agenda: Day 3
- Agenda: Day 4
- Lesson 1: Objectives
- Oracle Planning: Overview
- EPM Cloud Services
- Planning Modules
- Planning Clients and Tools
- Creating FreeForm Applications
- Data Exchange
- Planning Business Process
- Planning Business Case
- Accessing the Planning Environment
- Summary
- Practice 1

Navigating Planning

- Objectives
- Logging In to Planning
- Planning Home Page
- Exploring the Navigator Menu
- Application Cluster
- Reviewing Application Properties
- Reviewing Application Settings
- Valid Intersections: Overview
- Invalid Intersections
- Cell Level Security
- Data Integration
- Data Maps
- Managing Jobs
- Data Entry: Overview
- Business Rules: Overview
- Setting Up User Preferences
- Managing Connections
- Summary
- Practice 2

Setting Up Planning

- Objectives
- Oracle EPM Cloud Services
- EPM Standard Cloud Service Landing Page
- EPM Enterprise Cloud Service Landing Page
- Planning Business Process: Overview
- FreeForm Applications
- Features of Multi-Cube FreeForm Applications
- Creating a New Application: General
- Creating a New Application: Details
- Creating a New Application: Customize
- Calendar Structure
- Currency Specifications
- Customizing Cube Names and Enabling Sandboxes
- Planning Dimensions
- Required Dimensions
- User-Defined Dimensions
- Dimension Hierarchies: Genealogy
- Dimension Hierarchies: Generations and Levels
- Drilldown Process
- Hierarchy Aggregations
- Dimensions and Metadata
- Cubes: Overview

- Cube Types
- Number of Custom Cubes in Each Application
- Managing Cubes
- Summary
- Practice 3

Managing Dimensions

- Objectives
- Dimension Hierarchies
- Performance Settings and Data Type Evaluation Order
- Managing Dimensions
- Creating Dimensions
- Modifying Dimension Properties
- Dimension Properties
- Managing Members
- Property Value Inheritance
- Alternate Hierarchies
- Deleting Members
- Finding Members
- Sorting Members
- Summary
- Practice 4

Setting Up Dimensions

- Objectives
- Customizing Time Periods
- Setting Up Dynamic Time Series
- Year and Period Dimensions
- Scenarios and Versions
- Creating Scenarios
- Creating Versions
- Entities
- Entity Members and Cubes
- Currency Values for Entities
- Adding Entities
- Accounts
- Account Types
- Time Balance Properties
- Saved Assumptions
- Data Types and Exchange Rate Types
- Adding Accounts
- Aggregating Accounts
- Creating Aliases
- Summary
- Practice 5

Importing and Exporting Metadata

- Objectives
- Metadata Import/Export: Overview
- Metadata Import File Structure
- Loading the Import File
- Importing Metadata with Jobs
- Scheduling Jobs to Import Metadata
- Exporting Metadata: Creating Exports
- Creating Jobs to Export Metadata
- Scheduling Jobs to Export Metadata
- Summary
- Practice 6

Setting Up User-Defined Elements

- Objectives
- Creating Member Formulas
- Attribute Dimensions
- Creating Attributes
- Assigning Attribute Values
- Adding User-Defined Attributes
- Managing Substitution Variables
- Managing User Variables
- Smart Lists: Overview
- Creating Smart Lists
- Associating Smart Lists with Members
- Forms and Smart Lists
- Summary
- Practice 7

Loading and Calculating Data

- Objectives
- Data Load Options
- Managing Planning Data
- Setting Up the Load File
- Importing Data
- Importing Exchange Rates
- Validating Data Imports
- Scheduling Data Imports
- Exporting Data
- Scheduling Data Exports
- Data Synchronization
- Data Calculations
- Member Rollups
- Member Formulas

- Business Rules: Overview
- Summary
- Practice 8

Setting Up Planning Security

- Objectives
- Planning Security: Overview
- User Authentication and Global Roles
- Planning Roles in Oracle Identity Management
- Managing Users in Oracle Identity Manager
- Data and Artifact Security
- User and Group Security
- Groups: Overview
- Managing Users
- Assigning Roles to Planning Users and Groups
- Exporting Users and Groups
- Importing Users and Groups
- Generating Provisioning Reports
- Assigning Access Permissions
- Dimension Security
- Inheritance Options
- Precedence and Inheritance of Access Permissions
- Reporting on Access Permissions
- Valid Intersections
- Valid Intersection Group
- Valid Intersections Rules
- Invalid Data and Invalid Intersection Reports
- Cell-Level Security
- Creating Cell-Level Security Definition
- Summary
- Practice 9

Creating Forms

- Objectives
- Forms: Overview
- Form Components
- Form Design Considerations
- Designing Forms
- Setting Up the Form Layout
- Setting Up Properties
- Form Display, Smart View, and Printing Options
- Selecting Members
- Setting Up Other Options
- Assigning Business Rules
- Setting Up Smart Push

- Creating Rolling Forecasts
- Modifying Rolling Forecast Variables
- Creating Formula Rows and Columns
- Creating Menus
- Building Validation Rules
- Processing Cells for Data Validation
- Exporting and Importing Forms
- Summary
- Practice 10

Creating Dashboards and Infolets

- Objectives
- Dashboards
- Viewing Dashboards
- Dashboard Versions
- Designing Dashboards (1.0)
- Dashboards: Master Forms and Details
- Design Consideration for Dashboards (1.0)
- Designing Dashboards (2.0)
- Dashboard 2.0: Quick Analysis
- Designing Infolets
- Viewing Infolets from the Home Page
- Exporting and Importing Dashboards and Infolets
- Summary
- Practice 11

Managing Business Rules

- Objectives
- Business Rules: Overview
- Calculation Manager: Overview
- Business Rule Creation Process
- Determining Calculation Requirements
- Launching Calculation Manager
- Rule Components
- Formula Components
- Variables
- Script, Condition, and Loop Components
- Templates: Overview
- Setting Up the Clear Data Template
- Setting Up the Copy Data Template
- Setting Up the Amount-Unit-Rate Template
- Setting up The Allocate - Level to Level Template
- Setting Up the Allocation Template
- Setting Up the Aggregation Template
- Setting Up the Currency Conversion Template

- SET Commands Template
- Creating Custom-Defined Templates
- Creating Business Rules and Rulesets
- Validating and Deploying Rules
- Assigning Business Rule Security
- Launching Business Rules from Forms
- Launching Business Rules from Task Lists
- Launching Business Rules from the Rules Card
- Summary
- Practice 12

Setting Up Groovy Rules

- Objectives
- Groovy Overview
- Groovy in EPM Cloud
- Creating Groovy Business Rules
- Groovy Script Basics
- Summary
- Practice 13

Entering Planning Data

- Objectives
- Forms: Overview
- Navigation Keys
- Navigating Forms with Menus
- Visual Cues in Forms
- Viewing Member Formulas
- Viewing Consolidation Operators
- Identifying Date Fields, Text Fields, and Smart Lists
- Data Actions
- Editing Data
- Adding Details to Plan Data
- Adding Comments
- Adding Supporting Detail
- Adding Attachments
- Adjusting Data
- Adjusting Data with Quick Commands
- Spreading Data
- Spreading Data by Using Grid Spread
- Spreading Data by Using Mass Allocate
- Filtering Data
- Sorting Data
- Formatting Members and Data
- Submitting and Calculating Data
- Saving and Refreshing Data

- Pushing Data
- Performing Ad Hoc Actions
- Creating an Ad Hoc Grid
- Ad Hoc Grid Properties
- Ad Hoc Options
- Summary
- Practice 14

Reporting on Cloud EPM Data

- Lesson Objectives 15-2
- Cloud EPM Reports Overview 15-3
- Design Features 15-4
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Managing Approvals

- Objectives
- Approval Management Features
- Approval Process Overview
- Approval Setup Workflow
- Enable Dimension Members for Approval
- Approval Unit
- Approval Unit Hierarchies
- Creating Approval Unit Hierarchy
- Approval Groups
- Phased Approvals
- Defining Approval Groups
- Assign Approval Groups to an Approval Unit Hierarchy
- Assigning Owners and Reviewers Members
- Managing the Promotional Path with Data Validation Rules
- Assigning Approval Unit Hierarchy Scenario and Version Combinations
- Setting Up Email for Approvals Notification
- Starting the Review Process
- Approval Unit Review Status
- Setting Up Out of Office Approvals Options
- Summary
- Practice 16

Managing Navigation Flows

- Objectives
- Navigation Flow Overview
- Default Navigation Flow
- Managing Navigation Flows
- Embedding Third-Party URLs
- Adding Clusters, Cards, and Tabs
- Adding Tabs to a Tabular Page
- Organizing Clusters, Cards, and Tabs
- Summary
- Practice 17

Maintaining Planning

- Objectives
- Maintaining Planning Overview
- Migration

- Selecting Artifacts and Running Migrations
- Reviewing Migration Status Reports
- Monitoring Planning
- Cloning Planning Environment
- Steps to Clone Planning
- Tasks to Perform After Cloning Environment
- Setting Up Data Maps
- Creating Data Maps
- Performing System Diagnostics
- Viewing the Application Monitor Charts
- Summary
- Practice 18

Intelligent Performance Management (IPM)

- Objectives
- IPM Offerings
- IPM Insights Overview
- Types of Insights
- Configuring IPM Insights
- Configuring IPM Insights: Advanced Options
- Configuring IPM Insights: Settings
- Auto Predict
- Use Cases for Auto Predict
- Creating Auto Predictions
- Detailed Reports for Auto Prediction
- Machine Learning : Bring Your Own ML
- Considerations for Bring Your Own ML
- Machine Learning: Univariate and Multivariate Predictions
- Bring Your Own ML: Overview of Steps
- Importing the ML Model: Model Summary
- Importing the ML Model: Model Mapping
- Importing the ML Model: Analyzing Model
- Importing the ML Model: Testing the Model
- Summary
- Practice 19

FreeForm Application Overview

- Objectives
- About FreeForm Applications
- Creating FreeForm Application
- Create FreeForm Application
- Important Consideration - OTL and Snapshot Import
- Summary

- Objectives
- Introduction to EPM Planning Modules
- EPM Planning Modules
- Planning Modules Implementation Process
- Navigating Financials
- Financials
- Enabling Financials: Overview
- Configuring Financials: Overview
- Post Financials Configuration Tasks
- Financials Modules: Chart of Accounts
- Financials – Methodologies
- Financials KPIs
- KPIs in Financials
- Leveraging Financials KPIs
- Workforce – Key Capabilities
- Workforce Benefits
- Workforce Capabilities
- Enabling Workforce
- Configuring Workforce
- Post Workforce Configuration Tasks
- Navigating Workforce
- Workforce Rules
- Updating Multiple Employees and Jobs Details
- Projects Capabilities
- Enabling Projects Module: Overview
- Configuring Projects
- Post Projects Configuration Tasks
- Project Rules
- Planning – Projects
- Capital Features
- Enabling Capital: Overview
- Configuring Capital: Overview
- Post Capital Configuration Tasks
- Capital Rules
- Strategic Modeling: Overview
- Getting Started Checklist
- Strategic Modeling Model: Overview
- Creating a Strategic Modeling Model
- Strategic Model Access Permissions
- Simulations: Overview
- Pushing Data Between Strategic Modeling and Planning
- Module Integration: Financials, Workforce
- Module Integration: Projects, Capital, Strategic Modeling
- Summary