Administer Enterprise Profitability And Cost Management LVC

Oracle Enterprise Performance Management Cloud

DURATION	MODULES	COURSE CODE
2 Days	**16 Lectures**	**—**

Course Overview

Learning Outcomes/Skills Learned Set up Enterprise Profitability and Cost Management. Recognize ASO dimensions and best practices for Enterprise Profitability and Cost Management. Plan, create, and manage models, rule sets, and rules for data transformation. Design rule balancing, profit curves, and trace for analysis. Export ASO data using Integrations.

What You Will Learn

Introduction to EPM Cloud and Enterprise Profitability and Cost Management

- Objectives
- Introduction to Oracle EPM Cloud
- EPM Cloud Business Processes
- EPM Standard and Enterprise Cloud Services
- EPM Cloud Client Tools
- Data Exchange
- Accessing EPM Cloud Environments
- Profitability and Cost Management Business Process
- Enterprise Profitability and Cost Management: Overview
- Data Transformation Process
- Analysis Tools
- Implementation Steps
- Summary

Setting Up Enterprise Profitability and Cost Management

- Objectives
- Enterprise Profitability and Cost Management Applications
- Cubes: Overview
- Calculation and Reporting Cubes
- Custom Cubes
- Setting Up Your Instance

- Enterprise Profitability and Cost Management Landing Page
- Migrating from Profitability and Cost Management
- Creating an Application
- Calendar Frequency and Structure
- Multicurrency Applications
- Default Dimensions
- Starting the Application Creation Wizard
- Create Application: General
- Create Application: Details
- Create Application: Review
- Navigating Enterprise Profitability and Cost Management
- Application Cluster
- Modeling Cluster
- Data Card and Data Forms
- Reporting and Analysis
- Tools Cluster
- Academy Card
- Navigator Menu
- Managing Jobs
- Summary

Aggregate Storage Dimensions

- Objectives
- Dimensions in ASO Cubes
- Hierarchy Types
- Stored Hierarchies
- Dynamic Hierarchies
- Multiple Hierarchies
- Shared Members
- Design Recommendations for ASO Hierarchies
- Setting Dimension Hierarchy Type
- Setting Hierarchy Type in Multiple Hierarchy Dimensions
- Hierarchy-Based Calculations
- Hierarchy Structure Calculations
- Member Formulas
- Implied Shares
- Dimension Order and Evaluation Order
- ASO Calculation Order
- Solve Order
- Solve Order: Example
- Summary

Designing Dimensions for Enterprise Profitability and Cost Management

- Objectives
- Required Dimensions and Default Members

- POV Dimensions
- Years Dimension
- Period Dimension: Calendar Frequencies
- Period Dimension: Adding Period-to-Date Hierarchies
- Scenario Dimension
- Version Dimension
- Account and Entity Dimensions
- Rule and Balance Dimensions
- Currency Dimension
- Design Best Practices for Application Scalability
- Dimension Count
- Dimension Member Count
- Attributes and UDAs
- Attributes and UDAs: Design Considerations
- Design Best Practices for Dimensions
- Selecting Dimension Hierarchy Types
- Managing Dimension Structure
- Dimension Structure Example: Stored Single Hierarchy
- Dimension Structure Example: Multiple Hierarchies
- Placeholder Dimensions
- View Dimensions
- Period-to-Date with View Dimensions
- Design Best Practices for Managing Data Scale
- BksML50: Overview
- Dimensions in BksML50
- Summary

Calculating Models: Overview

- Objectives
- Waterfall Data Transformation
- Models and Rules: Overview
- Model POVs
- Modeling Workflow
- Viewing Models and Rules
- Model Validation
- Calculating Models
- Viewing Job Progress and Status
- Review Calculation Processes
- Reviewing Calculations in Rule Balancing
- Summary

Managing Model POVs

- Objectives
- Creating Model POVs
- Editing Model POV Status

- Copying Model POVs
- Clearing Data from Model POVs
- Deleting Model POVs
- Summary

Managing Models and Rule Sets

- Objectives
- Creating Models
- Creating Models: Defining a Model
- Creating Models: Adding a Model Context
- Creating Rule Sets
- Defining a Rule Set
- Rule Set Calculation Options
- Iterative Rule Set: Example
- Adding a Rule Set Context
- How Model and Rule Set Context Work Together
- Creating Multiple Rule Sets
- System Dimensions and Calculations
- Balance Dimension Members and Calculations
- Rule Dimension Members
- System Calculation: Example
- Server-Based Calculation Settings
- Summary

Managing Rules

- Objectives
- Creating Allocation Rules
- Defining an Allocation Rule
- Defining the Allocation Source
- Defining the Allocation Source: Segmenting Calculations
- Defining the Allocation Destination
- Defining the Allocation Destination: Same As Source, Same Dimension
- Same As Source, Different Dimension: Use Case 1
- Same As Source, Different Dimension: Use Case 2
- Same As Source, Different Dimension: Member Matching Expressions
- Selecting Same As Source, Different Dimension
- Filtering Source and Destination Members
- Best Practices for Defining Allocation Sources and Destinations
- Selecting the Allocation Driver Location
- Selecting the Allocation Driver Location: Example (Part 1)
- Selecting the Allocation Driver Location: Example (Part 2)
- Selecting the Allocation Offset Location
- Alternate Offset Location Use Cases and Best Practices
- Alternate Offset Location: Example
- Validating the Allocation Rule Definition

- Creating Custom Calculation Rules
- Defining a Custom Calculation Rule
- Selecting the Result Dimension
- Selecting Target Dimension Members
- Adding a Calculation Formula
- Tips for Using NONEMPTYTUPLE Effectively
- Validating the Custom Calculation Rule Definition
- Creating Custom Calculations for Currency Conversion
- Bulk Operations for Rules
- Creating Multiple Rules
- Displaying Models and Rules on the Mass Edit Tab
- Adding and Replacing Members in Multiple Rules
- Enabling and Disabling Multiple Rules
- Copying Rules Between Rule Sets and Models
- Summary

Validating Models and Running Calculations

- Objectives
- Validating Models
- Validation Errors and Warnings
- Running Model Calculations for POVs
- Processing Range Options
- Processing Range Example: Start from Selected Rule
- Processing Range Example: End After Selected Rule
- Processing Range Example: Ruleset Range
- Processing Range Example: Single Rule
- Processing Options
- Running Multiple POV Calculations as a Batch
- Running Calculations Using EPM Automate
- Clearing Data from the Calculation Cube
- Clearing Data: Deleting or Renaming Rules
- Summary

Getting Started with Smart View

- Objectives
- Smart View: Introduction
- Downloading the Smart View Client and Extensions
- Installing the Smart View Client and Planning Admin Extension
- Smart View Ribbon and Panel
- Data Source Connections
- Investigating Data with Ad Hoc
- Working with Forms and Dashboards in Excel
- Managing Dimensions in Smart View
- Summary

Managing and Troubleshooting Model Calculations

- Objectives
- Calculation Analysis: Overview
- Calculation Details Panel
- Model and Calculation Reports
- Calculation Statistics Report
- Calculation Statistics Report: Summary and Job Log
- Calculation Statistics Report: Calculation Statistics
- Troubleshooting Calculations by Using the Calculation Statistics Report
- Comparing Calculation Runs
- Calculation Statistics Comparison Report: Job Statistics
- Calculation Statistics Comparison Report: Rule Statistics
- Viewing Model Details
- Comparing Models
- Validating Rule Data
- Capturing Calculation Diagnostics to Validate Rule Data
- Providing Feedback for Troubleshooting Calculations
- Submitting Service Requests for Calculation Issues
- Rerunning POV Calculations
- Creating Models from Snapshots
- Verifying Calculation Results in Rule Balancing
- Reading Rule Balancing Data
- Viewing Rule Balancing Data in Smart View
- Summary

Designing Rule Balancing, Profit Curves, and Allocation Traces

- Objectives
- Data Forms: Overview
- Organizing Rule Balancing, Profit Curve, and Trace Forms
- Rule Balancing and Data Forms
- Viewing and Editing Forms from the Rule Balancing Page
- Designing Forms for Rule Balancing
- Profit Curves
- Profit Curves: Details
- Profit Curves: Category Analysis
- Profit Curves: Data
- Designing Forms for Profit Curves
- Creating Profit Curves
- Tracing Allocations
- Running a Trace
- Working with Trace Diagrams
- Viewing and Editing Forms from the Trace Page
- Designing Forms for Tracing Allocations
- Summary

Working with Dashboards, Infolets, and Reports

- Objectives
- Analyzing Data
- Dashboards 1.0
- Dashboards 2.0
- Infolets
- Reports
- Summary

Security in Enterprise Profitability and Cost Management

- Objectives
- Security Layers
- Single Sign-On
- Predefined Roles
- Access Control
- Assigning Application Roles
- Assigning Permissions
- Enabling and Disabling Security for Dimensions
- Assigning Security to Dimension Members
- Defining Cell-Level Security
- Summary

Data Integration for Enterprise Profitability and Cost Management

- Objectives
- Data Integration in Enterprise Profitability and Cost Management
- Data Maps and Smart Push
- Data Integration: Standard Workflow
- Data Integration: Quick Mode
- Application Data Export
- Common Integrations for Enterprise Profitability and Cost Management
- Required Configurations Before You Start
- Export Level 0 Data to an EPM Data File
- Creating an EPM Data File Target Application
- Creating a Quick Mode Integration to Export Data
- Running the Integration and Finding Export Results
- Exporting PCM_CLC Data to PCM_REP with Quick Mode: General
- Exporting PCM_CLC Data to PCM_REP with Quick Mode: Map Dimensions
- Exporting PCM_CLC Data to PCM_REP with Quick Mode: Options
- Export to Oracle ERP Cloud General Ledger
- Summary

Overview of Migrating from Profitability and Cost Management

- Objectives
- Comparing Application Types

- Comparison: Environment
- Comparison: Dimension Requirements
- Comparison: Rules and Modeling
- Migration Path
- What is migrated to Enterprise Profitability and Cost Management?
- What is not migrated to Enterprise Profitability and Cost Management?
- Migration Template
- Generating and Downloading the Migration Template
- Migration Template Sections
- Migrate to EPCM Page in Profitability and Cost Management
- Repeating Migrations
- Post-Migration Tasks in Enterprise Profitability and Cost Management
- Summary