



Planning in the Oracle EPM Cloud (PBCS)

REFRESHER COURSE

Course duration:	2 days
Target audience:	Solution Admin Roles
Required:	Bringing your own/work laptop

Course Description

If you have been assigned to be the Administrator of the Planning in the Oracle EPM Cloud solution in your organisation, this course will be a perfect knowledge boost, whether you're at the beginning of your path, or simply looking for 'Tips & Tricks' and advanced features information.

In the two days of this course, you'll be fast tracked into the solution, getting an overview of many features and having a chance to try them out in our development service. The course mode will be geared toward being 'technical', working through examples and analysing common scenarios and best practices.

Expectations

After completing this course, the Admins will have the knowledge to not only maintain their applications, but to develop new features, have more confidence supporting their end users and overall have an in-depth understanding of the service.

Course Agenda

1. Planning in the Oracle EPM Cloud (PBCS)

Overview	Short overview of the service, purpose, capabilities
Terminology and Concepts	Brushing through essential terminology
Creating Planning Applications	Instructions on how to create applications from scratch on a live example
Application Management	Backing up and restoring applications
Dimensions	Creating and optimizing business model
Loading Metadata	Going through various ways of metadata loading
User Defined Elements	Overview of additional features of data perspectives
Multiple Currencies and Exchange Rates	Examples on implementing multiple currencies into the planning application
Data Loading and Calculation	Overview of different ways of data load and calculation options
Security	Setting up security for a simple and a more complex security model
Data Forms	Data form features, usages and limitations
Planning Data Entry	Different ways to allow data entry into the planning application
Business Rules	Business rule management
Approvals Process	Setting up an approvals process on an example
Task lists	Task list purpose, features and limitations
Valid Intersections	Valid Intersections purpose and examples
Variables	Overview of types of variables and their usage
Navigation Flow	Tips&tricks to improve user experience on the web

2. The Data Management Tool

Data Management Orientation	Overview of Data Management
Data Management Interface	Exploring the Data Management Interface and features
Import Formats	Setting up Import formats for various data sources
Integration setup	Setting up integration of the application with various sources
Data Load Mappings	Example of setting data mappings between systems
Data Load Rules	Setting up Data Load Rules
Data Load Workbench	Using the Data Load Workbench

3. Reporting Options

Reporting Options	Overview of various Reporting options available
Financial Reporting	Overview of the Financial Reporting tool
Dashboards	Creating Dashboards - example
Advanced Smartview Reporting Features	Overview of various Smartview Features that facilitate reporting

4. Tasks and common issues

Usual Admin Tasks	Overview of some admin tasks focusing on the more advanced
Common User Issues	User issues, resolutions and how to avoid them
Recommendations	Recommendations on how to approach specific issues and troubleshooting them