



# Planning in Oracle EPM Cloud

## \* Admin

### REFRESHER COURSE

<b>Course duration:</b>	2 days
<b>Target audience:</b>	Planning in Oracle EPM Cloud Admin Roles
<b>Required:</b>	Have your own/work laptop

### Course Description

If you have been assigned to be the Administrator of the Planning in the Oracle EPM Cloud application 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 the many features and having a chance to try them out in our development Planning in Oracle EPM Cloud environment. The course mode will be geared toward being 'technical', working through examples and analysing common scenarios and best practices.

### Expectations

After completing this course, Administrators 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 application.

\* Planning in Oracle EPM Cloud was previously known as Oracle Planning and Budgeting Cloud Service (PBCS) or Oracle Enterprise Planning and Budgeting Cloud Service (EPBCS)

## Course Agenda

### 1. Planning in Oracle EPM Cloud

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

### 2. The Data Management Tool

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

### 3. Reporting Options

<b>Reporting Options</b>	Overview of various reporting options available
<b>Financial Reporting</b>	Overview of the Financial Reporting tool
<b>Dashboards</b>	Creating dashboards - example
<b>Advanced Smartview Reporting Features</b>	Overview of various Oracle SmartView for Microsoft Office features that facilitate reporting

#### 4. Tasks and common issues

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