



keyteachTM

Oracle Planning Cloud: E/PBCS Administrator On Demand Subscription



Learn how to design and build Oracle Planning Cloud (E/PBCS) applications. Create planning models and gain an in-depth understanding of how to make efficient use of the capabilities and extensibility of this planning and budgeting solution. Learn how to leverage the potential of this system to build more effective applications and workflows.

This course focuses on the options, functionality and design considerations that impact the performance of Planning Cloud applications (E/PBCS). You'll learn how to apply best practice techniques during the development process.

You'll learn about the multi-dimensional hierarchies and gain an appreciation of the complexities and possibilities of the solution. Find out what can be achieved through a detailed understanding of the underlying structure of the Oracle Planning Cloud solution.

Learn how to build data forms, load data, explore more detailed calculations and understand the planning cycle. See the ways in which planning data can be adjusted, translated into different currencies and aggregated within Oracle Planning Cloud E/PBCS.

This course will equip attendees with the necessary tools and knowledge to design and build effective, responsive and highly optimised applications.

This course includes an introduction to Data Integration (Data Management) and the development of Business Rules in Calculation Manager, however, learners should be aware that additional follow-on courses are also available for those that need to build more extensive expertise in these areas.

FOLLOW-ON COURSES:

- Data Integration (Data Management) - 2 days
- Business Rules - 2 days
- Financial Reporting: Web Studio - 2 days



Course Information:

Course title:	Oracle Planning Cloud (E/PBCS): Administrator
Duration:	29 hours
Audience:	System administrators, developers, and implementation consultants
Pre-requisites:	None
Delivery method:	QAS Self Study
Advanced preparation:	None
Recommended CPE credits:	32 credits - computer software and applications
Programme level:	Intermediate

Learning Objectives

By the end of this course learners will be able to:

1. Explain how the Oracle Planning Cloud database functions and how it can be maintained to enable efficient applications
2. Identify how EPM Cloud applications can be backed-up and migrated from test to production or to another Oracle Planning Cloud instance
3. Recognize how Business Rules support the financial planning process
4. Summarize the difference between BSO and ASO and how Data Maps can be used to transfer data between plan types
5. Recall how to build data/web forms, Dashboards and Infolets
6. Differentiate between the web interface and Smart View and how each can be used to update metadata

Detailed Agenda

- Solution overview.
- Overview of PBCS functionality .
- Navigation of the interfaces.
- Review key terms and concepts.
Review the key PBCS terms relating to dimensions, members and the wider application. Explore the concepts that are key to the planning process in PBCS to gain a "big picture" understanding.
- Loading metadata.
- Introducing Data Integration (Data Management).
- Other data entry methods.
- Adjusting forecasts.
A variety of adjustment techniques are available when working with E/PBCS, allowing you to amend individual values or adjust whole data ranges as required.
- Comparing budget versions.
PBCS allows for multiple versions of your budgets and forecasts to be prepared. Discuss how this functionality can be leveraged to provide an iterative planning process.
- Rolling forecasts.
- The approvals process.
- Lifecycle (application) management.
Discover how to move artefacts between development and production applications. Find out how to back up an application.
- Basic calculation and member formulas.
- Managing exchange rates.
- Understanding security
Control access to an application and its components.
- Overview of Financial Reporting Studio.
Understand more about running Financial Reports and get an overview of Financial Reporting Studio.
- Smart View.
- Ad Hoc Analysis.
Discover the benefits of using Ad Hoc Analysis functionality to create queries and analyse data from PBCS.
- Smart View across Microsoft Office.
Understand how Smart View can be used across the suite of Microsoft Office products such as Word, PowerPoint and Outlook.
- Review of architecture.
- My Services.
- Application and plan types.
- Planning Cloud dimensionality.
- Creating applications.
Explore the variety of options and design decisions available when creating new Planning Cloud applications.
- Designing Data forms & task lists.
Task lists guide users through the planning process and data forms provide a window to the database for the review and manipulation of data.
- Building Custom menus.
Learn how to enhance navigation within Planning Cloud through the development of custom menus that enable users to more easily access custom content.
- Grid diagnostics.
- Data Auditing.
- An introduction to the setup of source data integration with Data Management
An additional two-day course is available for learners that require more extensive knowledge.
- Designing an Approvals Process.
Undertake a simple approvals process in order to review the various available options for the promotion, delegation and sign off of planning data. You'll discover how to set up a Planning Unit hierarchy and perform the required Scenario and Version assignment.
- Introducing Calculation Manager.
Understand how to work with Calculation Manager to design, maintain and deploy business rules for a Planning Cloud application. An additional two-day course is available for those that need more advanced calculations.
- Substitution variables.
Add flexibility through the use of dynamic substitution variables for use in data forms and business rules.
- Top-down allocations and bottom-up strategies.
- Translation and aggregation.
When working with multi-currency applications, you can automate the translation of data to the available reporting currencies.
- Driver-based planning.
Customisable calculations allow you to embed a driver-based approach in your planning process.
- Understanding EPM Automate.
Discover how the EPM Automate utility can help to streamline and automate common tasks such as loading data and managing the Cloud environment.



Keyteach is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. Registration ID No 115820. State boards of accountancy have the final authority on the acceptance of individual courses for CPE credit. Any complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org