

Functional Course

Oracle Hyperion Enterprise Planning & Budgeting Cloud Service (EPBCS) Fundamentals

The Oracle Enterprise Hyperion Planning & Budgeting Cloud Service (EPBCS) training is designed to guide students through an orientation of the EPBCS environment and provides a brief overview of Financials, Workforce, Project and CapEx Frameworks. We then review built-in functionality and configuration wizards.

We address how to set-up and configuration of the EPBCS environment and create/configure your base financials workflow metadata. We then address how to setup security, create forms, setup and manage the approval process and load/analyze data. We then focus on Smart View and Financial Web Reporting Studio. Students will build ad hoc reports, data forms, and learn how to enter data and manage metadata using Smart View. The course format consists of lecture plus hand-on exercises and workshops within EPBCS.

Prerequisites:

- Basic Microsoft Windows skills
- Knowledge of spreadsheets

Overview of Enterprise Planning and Budgeting Cloud Service (EPBCS)

- Oracle EPBCS Overview
- EPBCS Features
- Planning and Essbase
- Aggregate Storage Option (ASO) and Block Storage Option (BSO) Databases

Simplified User Interface

- Logon to Application
- Navigate the Home page
- Access the Navigator Page
- Set Preferences

Metadata Management

- Manage Metadata
- Load Dimension Metadata
- Refresh the Application and Database
- Manage Jobs

Create and Manage the Application

- Create and manage the application
- Application Types
- Define Setup Options for the Application
- Remove an application
- Schedule Maintenance
- Navigate the Inbox and Outbox Explorer
- Launch the Application Monitor

Manage Business Rules

- Apply Business Rules to a Form
- Change the Display Order of Business Rules on a Form
- Define Properties of Business Rules
- Assign, Edit or Remove Access to Business Rules

Create and Use Forms

- Forms and Folders Overview
- Create Simple Forms
- Create Composite Forms
- Form Access
- Create Menus
- Create Formula Rows and Columns
- Build Validation Rules
- Set Up Form Properties
- Use Smart Lists
- Spread Data
- Calculate Data in Forms
- Perform Ad Hoc Actions in Forms

Create and Use Task Lists

- Task Lists Overview
- Usage of Task Lists
- Create Task Lists
- Manage Task Lists
- Add Tasks to Task Lists
- Clear Task Lists
- Assign and Remove Access to Task Lists
- Print Task List Reports

Security

- Add a User
- Modify or Remove a User
- Create, Edit & Delete a User Group

Smart View

- Smart View Overview
- Smart View Installation Components
- Typical Business Process for Smart View
- Smart View Ribbon
- Smart View Options
 - Global Options
 - Sheet Level Options
 - Data Options
 - Advanced Options
 - Formatting Options
 - Cell Styles
 - Smart View Panel
 - Connections
 - Format Ad Hoc Grids
 - Zoom In / Zoom Out
 - Set a Default Level Zoom
 - Enable Double-Click Zooming
 - Pivot
 - Remove Selected Members from Grid
 - Insert Rows & Columns
 - Set Dimensions & Members
 - Select Members from the Member Selector
 - Display POV toolbar
 - Place Members on the Grid with POV Toolbar
 - Cell-based POV for Cloud

Manage the Approval Process

- Approval Process Overview
- Map Types
- Planning Unit Hierarchies
- Impact of Entity Hierarchies on the Review Process
- Budgeting Processes Types

Dashboards

- Dashboards Overview
- Create & View Dashboards
 - Design a Palette
 - Dashboard Settings
 - Add a form/chart to a Dashboard
 - Add Commentary to a Dashboard
 - Add a URL to a Dashboard
 - Delete a Dashboard
 - Perform a “Copy As” for a Dashboard
 - Assign/Remove Permission to a Dashboard
 - Global and Local POV

Maps

- Maps Overview
- Maps Types
- Processing Order
- Edit Mapping Tables
- Export/Import Maps

Reporting Web Studio

- Report Objects
- Text Functions
- Auto Calculations
- Apply Mathematical Functions
- Select Members for Row and Columns
- Alias Tables
- Setting the Point of View
- Books Overview
- Create Books
- Batches Overview
- Create Batches

Data Management

- Data Management Overview
- Import Formats
 - Import Format Mappings
 - Fields for Fixed Import Groups
 - Import Format Builder
 - Fields for Delimited Import Groups
 - Import Expressions
- Locations
- Period Mapping
 - Global Mapping
 - Application Mapping
 - Source Mapping
- Category Mapping
 - Global Mapping
 - Application Mapping

Data Load Rules

- Data Load Overview
- File-Based Data Load Rules
- Run Data Load Rules
- Check Data Load Rule Status
- View Imported Data
- Schedule Data Load Rules

Workforce Framework

- Enterprise Workforce Planning Overview
- Plan Types Available in EPBCS
- Predefined Dimensions
- Predefined Artifacts
- Compare Design Differences between Financial Planning Cubes and Workforce Planning Cubes
- Integration Between Enterprise Workforce Budgeting, P&L Budgeting and Reporting
- Plan Types Available in EPBCS

Capital Framework

- Enterprise Capital Planning Overview
- Developing an Asset
- Putting an Asset in Service
- Handling Existing Asset Information
- Cash Flow of Asset Decisions
- On-going Asset Costs
 - Maintenance
 - Insurance
- Project Ranking
- Decision Packages
- CIP

Project Planning Framework

- Enterprise Project Planning Overview
- Plan Types Available in EPBCS
- Asset Integration
- Define Capitalized Labor
- Define Non-capitalized Labor
- Allocating Employee Dollars
- CIP
- Project Ranking
- Working with Decision Packages