



# Functional Course

## Oracle Hyperion Planning & Budgeting Cloud Service (PBCS) Fundamentals

The Oracle Hyperion Planning & Budgeting Cloud Service (PBCS) training is designed to guide students through the steps required to set up and configure the PBCS environment, create and configure the base financials workflow metadata, and set up basic member formulas. We then address how to set up security, create and manage forms, set up the approval process, and load/analyze data. Next we focus on Smart View and Reporting Web Studio. Students will build ad hoc reports, work further with data forms and learn how to enter data and manage metadata using Smart View. Lastly, using the Dashboard module, students will learn how to build interactive dashboards with forms and charts. Basic reports, books and batches are explored with Reporting Web Studio.

The course format consists of lecture plus hand-on exercises and workshops within PBCS.

### Prerequisites:

- Basic Microsoft Windows skills
- Knowledge of spreadsheets

## Overview of Planning and Budgeting Cloud Service (PBCS)

- Oracle PBCS
- Planning Features and Applications
- Planning and Essbase
- Aggregate Storage Option (ASO) and Block Storage Option (BSO)

## 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
- Remove an application
- Schedule Maintenance
- Use the application Inbox and Outbox
- Launch the Application Monitor

## Data Management - Set-Up

- Overview of Data Management Set-up
- Import Formats
- Locations
- Period Mapping
- Category Mapping

## Maps

- Overview
- Map Types
- Processing Order
- Edit Mapping Tables
- Export/Import maps

## Data Load Rules

- Data Load Rules Overview
- Check Data Load Rules Status

## 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
- Calculate Data in Forms

## Business Rules

- Business Rules Overview
- Apply Business Rules to Forms
- Overview of Runtime Prompts
- Assign Access to Rules
- Manage Rules

## Task Lists

- Task List Overview
- Task List Usage
- Create & Manage Task Lists
- Assign and Remove Access to Task Lists

## Smart View

- Smart Overview
- Smart View Installation
- Smart View Ribbon Interface
- Smart View Options
  - Global and Sheet Level Options
  - Member Options
  - Data Options
  - Advanced Options
  - Formatting Options
  - Cell Styles
  - Smart View Panel
  - Connections
  - Format Ad Hoc Grid
  - Zoom In / Zoom Out
  - Set a Default Zoom Level
  - Enable double-click Zooming
  - Pivot
  - Remove Selected Members from Grid
  - Insert Row & Columns
  - Set Dimensions & Members
  - Select Members from the Member Selectors
  - Display POV Toolbar in Smart View
  - Place Members on Grid with POV Toolbar

## Security

- Security Overview
  - Edit a Group
  - Delete a Group

## Dashboards

- Dashboards Overview
- Create & View Dashboards
  - Design a Palette
  - Dashboard Settings
  - Add a Form
  - Add a Chart
  - Launch Runtime
  - Add Commentary
  - Add a URL
  - Delete a Dashboard
  - Perform a “Copy As”
  - Assign & Remove Permissions
- Global and Local POV

## Financial Reporting Studio

- Financial Reporting Studio Overview
- Create a Report
- Open a Report
- Set Preferences for Financial Reporting View
- Assigns Access to a Financial Report
- Build Batches and Books

## Reporting Web Studio

- Reporting Web Studio Overview
- Create Basic Reports
  - Reports Objects Overview
    - Report Object Toolbar & Buttons
    - Create Text Boxes
    - Add Images
    - Save Report Objects
    - Insert Saved Report Objects
    - Remove a Report Objects
    - Design Headers & Footers
    - Use Text Functions
    - Create Grids
    - Select Members for Rows & Columns