

ORACLE EPBCS

Detailed Agenda

Essbase Overview

- Multidimensional Analysis
- · Difference between OLTP and OLAP
- Star schema Model
- · Types of Dimensions in Essbase
- · Order of the outline
- Dense & Sparse Concepts
- · Potential number of blocks and block size
- · Consolidation Properties
- Data Storage Properties
- · Different Data Types
- · Enabling Dynamic Time Series
- · Different Account Types

Introduction to EPBCS Frameworks

- Financials
- Workforce
- Capital
- Projects
- Launching EPBCS
- Opening Applications
- · Navigating in Planning

Financial Statement Framework

- · Revenue/Gross Margin
- Expense
- Income Statement
- · Balance Sheet
- Cash Flow
- Rolling Forecast
- · Weekly Planning
- · Financials Dimensions
- Configuring Financials
- Post Configuration Tasks
- · Importing Metadata and Data
- · Financials Rules

Importing & Exporting Metadata

- · Import & Export Metadata
- Metadata management using Smart view
- Practical Assignment

Navigation Flow, Valid Intersections & SmartPush

- · Creating a Navigation Flow.
- Creating a Valid Intersections
- SmartPush
- · Practical Assignment

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Workforce Framework

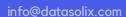
- Granularity
- Expense Planning
- Headcount Planning
- Workforce Management
- Workforce DimensionsConfiguring Workforce
- Post Configuration Tasks
- · Importing Metadata and Data
- · Workforce Rules
- · Assumptions and Defaults
- · Managing Existing Employees
- · Managing Hiring Requisitions
- · User-Defined Dimensions
- · Adding Attributes
- · Difference between UDA & Attribute
- · Creating Member Formulas
- · Adding User-Defined Attributes
- · Working with Smart Lists
- · Practical Assignment

Data Management

- · Introduction to Data Management
- · Setting Up Source Systems
- Registering Target Applications
- Import Formats Overview
- · Creating Import Formats
- · Defining Import Format Mappings
- · Skipping Lines in Import Files
- Adding Import Expressions
- · Locations Overview
- · Adding Locations
- · Setting Location Details and Integration Options
- Periods and Categories Overview
- Defining Period Mappings
- Defining Category Mappings
- · Point of View Overview
- Data Load Mappings Overview
- Defining Data Load Mappings
- Explicit Mappings
- · Mapping Rules
- Importing Mappings
- · Data Load Rules Overview
- · Defining Data Load Rules for File-Based Data Loads
- · Running Data Rules and Checking Rule Status
- Viewing Imported Data
- · Scheduling Data Load Rules
- Processing Data Overview
- Importing Source Data









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Business Rules

- Calculation methodology
- · Block storage considerations
- · Member formulas
- · Set Commands
- · Understanding the RTP
- · Business rule to convert currencies
- · Understanding block creation
- Calculation scope using FIX
- · Calculation scope using IF
- · FIX or IF?
- · Cross dimensional operators
- · Writing calculations using functions
- Relationship functions
- · Mathematical functions
- · Range functions
- · Conditional calculations
- · Practical Assignment

Creating Task Lists

- · Task Lists Overview
- · Navigating Task Lists in Basic Mode
- · Navigating Task Lists in Advanced Mode
- · Task List Creation Process
- Practical Assignment

Security

- · Planning Security Overview
- · User and Group Provisioning Overview
- Provisioning Users and Groups
- · Assigning Access Permissions
- · Practical Assignment

Capital Asset Framework

- · New Capital Investments
- Managing Existing Assets
- Capital Dimensions
- Configuring Capital
- · Post Configuration Tasks
- · Importing Metadata and Data
- Capital Rules

Using the Capital Framework

- Investments
- · Existing Assets
- Intangibles

Creating Data Forms & Dashboards

- · Creating Simple Data Forms
- Data Form Customization
- · Exporting and Importing Data Forms
- · Creating Menus
- Creating Formula Rows and Columns
- Building Validation Rules
- · setting Up User Preferences
- · Navigating Data Forms
- · Submitting Data in Data Forms

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- Creating Dashboards
- Practical Assignment

Project Financial Framework

- Project Type
- Revenue
- · Project Benefits
- Expense
- · Projects Dimensions
- · Configuring Projects
- Post Configuration Tasks
- · Importing Metadata and Data

Setting up the Dimensions

- Creating Aliases
- · Customizing Time Periods
- Creating Scenarios
- · Associating start year and end year to scenario dimension
- · Defining Versions
- · Top down/bottom up version types
- Adding Currencies
- · Practical Assignment.

Setting Account and Entity

- Entities Overview
- · Associating Currency to the entity
- · Adding and Modifying Entities
- · Accounts Overview
- Account Types
- Saved Assumptions
- Data Types and Exchange Rates
- Creating Account
- Practical Assignment
- · Validating Dimension Mappings
- Managing Data
- Loading Data to Target Applications
- · Practical Assignment

SmartView

- · Introduction to Smartview Excel addins
- · Connect to planning through smart view
- · Planning using smart view
- Adhoc analysis using smart view
- Drilldown & drill through using smart view features
- · Practical Assignment

EPM Automate

- · Introduction to EPM Automate.
- · Commonly used commands
- · Checking the jobs
- · Scheduling the jobs.
- · Practical Assignment





