

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

Workforce Framework

- Granularity
- Expense Planning
- Headcount Planning
- Workforce Management
- Workforce Dimensions
- Configuring 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



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
- 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

