

## Oracle Planning & Budgeting Cloud Service Fundamentals

### Course Description

**Course Name:** Oracle Planning & Budgeting Cloud Service Fundamentals  
**Course Number:** O-PBCS-FUN  
**Duration:** 5 Days

The Oracle Planning and Budgeting Cloud Service (PBCS) course 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 and analyze data.

The class then focuses on Smart View, Financial Reporting Studio 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.

Finally, using the Dashboard module, students will learn how to build interactive dashboards with forms and charts. Basic reports, books and batches are explored with Financial Reporting Studio and Web Studio.

The course format consists of lecture plus hands-on exercises and workshops within the Cloud Service.

#### Who Should Attend

- System Administrators
- Application Developers
- Project Managers & Team
- IT Support

#### Course Information

**Advance Preparation:** None  
**Program Level:** Intermediate  
**Delivery Method:** Group – Live  
**CPE Credit:** 42 credits in Specialized Knowledge and Applications

#### Prerequisites

- Basic Microsoft Windows skills
- Knowledge of spreadsheets
- Working knowledge of accounting

**Course Registration:** 203-941-0714 or online at <http://www.compintelligence.com>

**Policies:** For information regarding cancellations, refunds, or other questions, contact us at 203-941-0714 or [education@compintelligence.com](mailto:education@compintelligence.com)



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## Oracle Planning & Budgeting Cloud Service Fundamentals

### Course Outline

#### 1 Overview of Planning and Budgeting Cloud Services (PBCS)

- Overview of PBCS
- Planning Features
- Planning Application
- Planning and Essbase
- Aggregate Storage Option (ASO) and Blocked Storage Option (BSO) Databases
- Properties of Dimensions

#### 2 Navigation - Simplified User Interface

- Log on the Application
- Navigate the Home Page
  - Create an Announcement
  - Delete an Announcement
- Access the Navigator Page
- Set Preferences
- Log out of the Application

#### 3 Create and Manage the Application

- Create and Manage the Application
  - Create an Application
  - Application Types
  - Define Setup Options for the Application
- Remove an Application
- Schedule Maintenance
- Use the Application Inbox and Outbox
- Launch the Application Monitor

#### 4 Metadata Management

- Manage Metadata
  - Create and Maintain Common Dimensions
  - Create Hierarchies in Dimensions
  - Add Custom User-Defined Dimensions
  - Other Common Dimensions
  - Entity (Department)
  - Other User-Defined Dimensions
  - Member Formulas and Other Properties
  - Alias Tables
  - Smart Lists
  - User Defined Attributes (UDAs)

# Oracle Planning & Budgeting Cloud Service Fundamentals

## Course Outline

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

### 5 Data Management - Set-Up

- Overview of Data Management Set Up
- 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

### 6 Maps

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

### 7 Data Load Rules

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

### 8 Create and Use Forms

- Create and Use Forms
  - Forms and Folders Overview
  - Create Simple Forms

## Course Outline

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

### 9 Manage Business Rules

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

### 10 Create and Manage Task Lists

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

### 11 Smart View

- Smart View
- Smart View Installation Components
- Smart View Overview
- Typical Business Process for Smart View
- Smart View Interface
- Ribbon
- Smart View Options
- Global Options and Sheet Level Options
- Member Options
- Data Options

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## Course Outline

### Advanced Options

### Formatting Options

### Cell Styles

- Use Smart View Formatting

- Use Excel Formatting

### Smart View Panel

### Connections

- Shared Connections and Private Connections

- Connect to Data Sources

- Disconnect from Data Sources

- Create Private Connections

### Format Ad Hoc Grids

- Zoom In

- Zoom in to the Default Level

- Zoom in to a Selected Level

### Zoom Out

### Set a Default Zoom Level

### Enable Double-Click Zooming

### Pivot

### Remove Selected Members from the Grid

### Insert Rows and Columns

### Set Dimensions and Members

### Select Members from the Member Selector

### Display POV Toolbar in Smart View

### Place Members on the Grid with POV Toolbar

### Cell-Based POV for EPM Cloud

### Planning Admin Extension

## 12 Security

### Security Overview

### Edit a Group

### Delete a Group

## 13 Manage the Approval Process

### Manage the Approval Process

### Approval Process Overview

### Planning Unit Hierarchies

### Impact of Entity Hierarchy on the Review Process

### Budgeting Processes Types

### Create Planning Unit Hierarchies

### Assign Approval Unit Hierarchy

### Manage Approvals

### Copy Versions

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## Course Outline

- Copy Data
- Clear Cell Details

### 14 Dashboards

- Overview of Dashboards

- Create a Dashboard

- View Dashboards

- Create Dashboards

- Design Palette

- Dashboard Settings

- Add a Form to a Dashboard

- Add a Chart to a Dashboard

- Add a Form and a Chart to a Dashboard

- Launch Runtime

- Add Commentary to a Dashboard

- Add a URL to a Dashboard

- Delete a Dashboard

- Perform a Copy As for a Dashboard

- Assign Permission to a Dashboard

- Remove Permission to a Dashboard

- Global and Local POV

### 15 Financial Reporting Studio

- Overview

- Download the Financial Reporting Studio Software

- Create a Report

- Open a Financial Report

- Set Preferences for Financial Reporting View

- Assign Security to a Financial Report

- Build Batches and Books

### 16 Reporting Web Studio

- Overview

- Access the Financial Reporting Web Studio

- Create Basic Reports

- Report Objects Overview

- Report Object Toolbar Buttons

- Create Text Boxes

- Add Images

- Save Report Objects

- Insert Saved Report Objects

- Remove a Report Objects

- Design Headers and Footers



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## Course Outline

Use Text Functions

**Create Grids**

**Select Members for Rows and Columns**

**Set the Point of View**

**Create Charts from an Existing Grid**

Insert a Chart

**Define Chart Data**

**Define Chart Titles, Legends, Axes, Element Style and Bar Options**

**Position a Chart**