

Public

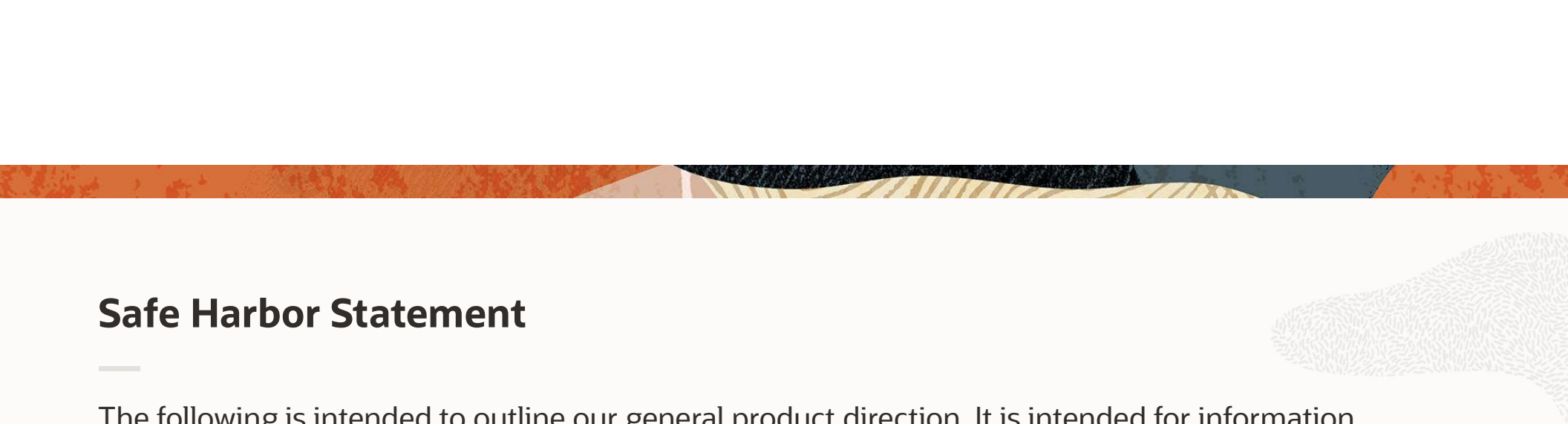
What's Coming in EPM Cloud Platform

Shankar Viswanathan

Oracle EPM Cloud

August, 2023





Safe Harbor Statement

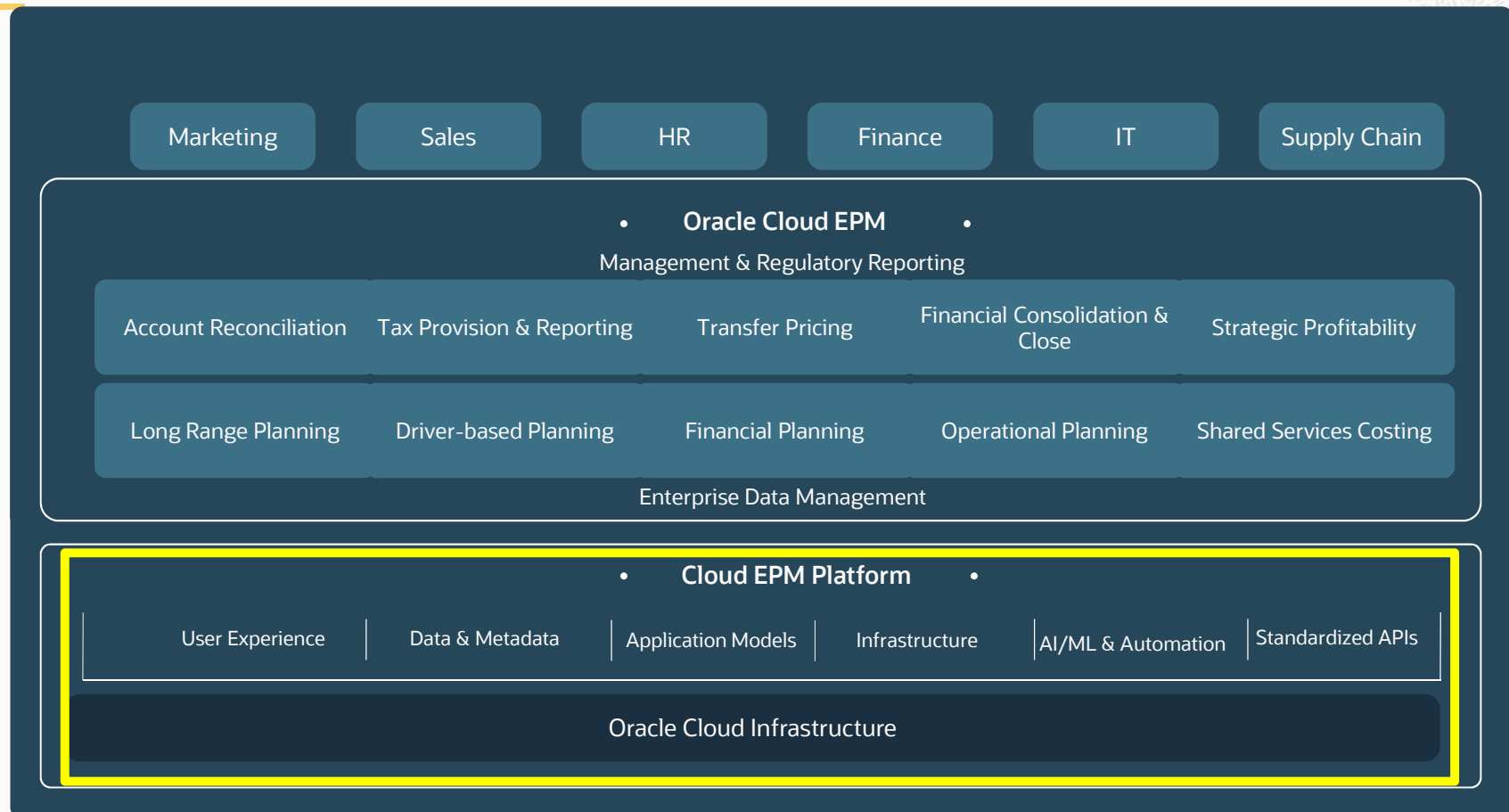
The following is intended to outline our general product direction. It is intended for information purposes only and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions.

The development, release, timing, and pricing of any features or functionality described for Oracle's products may change and remains at the sole discretion of Oracle Corporation.

EPM Cloud Platform



EPM Cloud



EPM Cloud Platform

User Interaction

User Interface
Dashboards/Forms/Adhoc/Reports
Set Up and Admin
Design & Usage Components
Preferences, and Settings
Smart View



Integration

Connections Manager
Data Integration
Import & Export Interface



Common Components

Jobs and Scheduler
Web Services & Groovy
EPM Task Manager
Navigation Flows



Infrastructure

Access Control
Security and Compliance
Deployment
Monitoring and Availability

Over 100 features in past 12 months

Hyperion (Core) Planning On-Prem > PBCS (2014) > EPM Cloud Platform (2016) / EPM Cloud Planning – Custom App Type (2019)

- Common technical or functional components used by any, some or all EPM Cloud business processes
 - 70+% of EPM Cloud Enterprise SKU Planning Apps are deployed using only the Platform



Categories

Ideas

Events

Hall of Fame

Training

Customer Success

Applications

Sales, Service, Marketing

Human Capital Management

Enterprise Resource Planning

Supply Chain &
Manufacturing

Reporting and Analytics

Applications Security

More

Infrastructure

Announcements

Oracle Communities

Financials

General Ledger & Intercompany

Payables, Payments & Cash
Management

Receivables & Collections

Subledger Accounting & Accounting
Hub

Expenses

Assets

Lease Accounting

Revenue Management

Budgetary Control

Tax & Global

Joint Venture Management

U.S. Federal Financials

Financials — General

Risk Management

Risk Management and Compliance

Project Management

Project Management

Procurement

Purchasing

Self Service Procurement

Sourcing

Supplier Management

Supplier Qualification Management

Reporting and Analytics

Reporting & Analytics for ERP

ERP Report Sharing Center

Integrations, Extensions, and Security

Integrations and Extensions

Security

Enterprise Performance Management

Account Reconciliation

Enterprise Data Management

Financial Consolidation and Close

Narrative Reporting

FreeForm

Planning

Profitability and Cost Management

EPM Platform

Tax Reporting



Applications

Sales, Service, Marketing

Human Capital Management

Enterprise Resource Planning

Supply Chain & Manufacturing

Reporting and Analytics

More

Infrastructure

Oracle Communities

Financials

General Ledger & Intercompany

Payables, Payments & Cash Management

Receivables & Collections

Subledger Accounting & Accounting Hub

Expenses

Assets

Lease Accounting

Revenue Management

Budgetary Control

Tax & Global

Joint Venture Management

U.S. Federal Financials

Cross Applications

Project Management

Project Management

Procurement

Procurement – Purchasing

Procurement – Self Service

Procurement – Sourcing

Procurement – Spend Classification

Procurement – Supplier Mgmt

Procurement – Supplier Qualification Mgmt

Enterprise Contracts

Risk Management

Risk Management

Enterprise Performance Management

Account Reconciliation

Enterprise Data Management

EPM Platform

Financial Consolidation and Close

FreeForm

Narrative Reporting

Planning

Profitability and Cost Management

Tax Reporting

Idea Lab Guidelines

Largest # of Ideas in EPM Cloud
~1600+ Open Ideas

EPM Cloud Platform

Platform Innovation Principles

- Customer Focused
- Better Performance
- Great Usability
- Extensible & Automatable



“
From little
seeds grow
mighty trees.
”

UNKNOWN

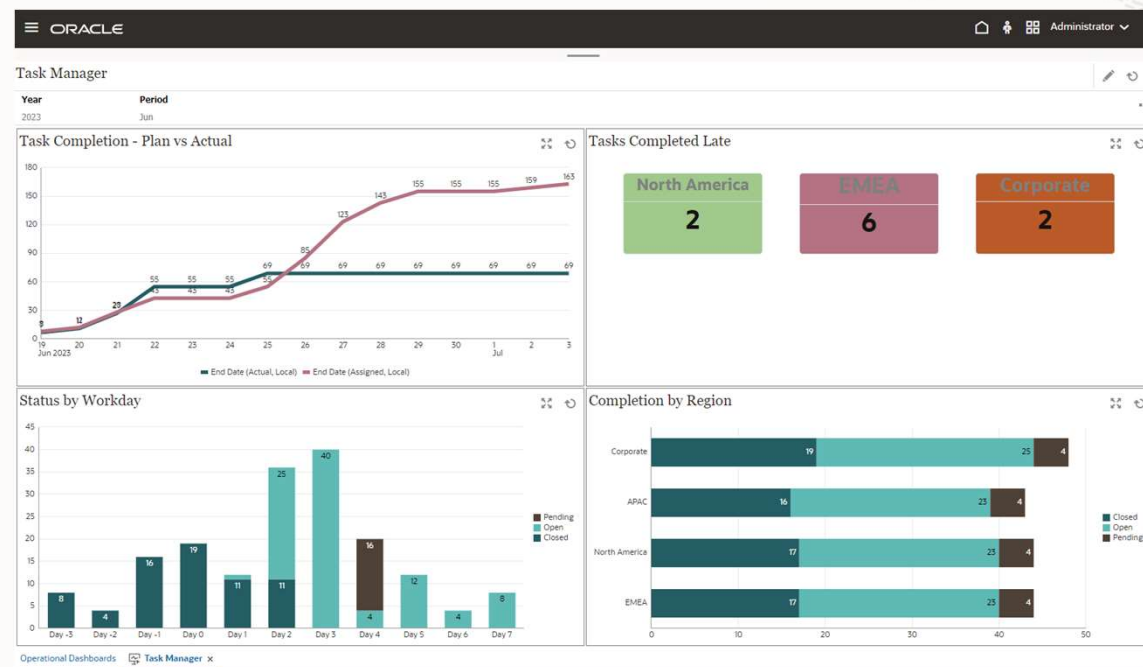
Ready to Serve

23.07
23.08



Operational Dashboards for Tasks Manager – 23.07

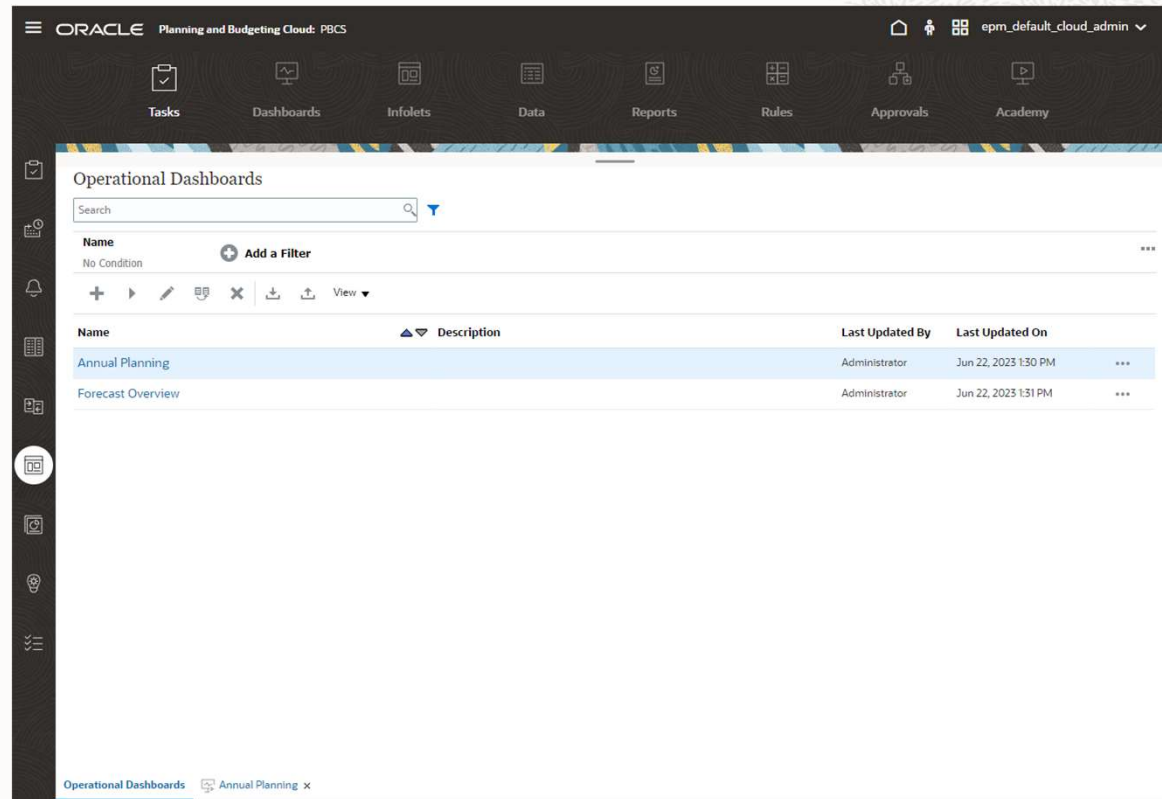
- New Operational Dashboard
 - Design dashboards to report on Task Manager and Alerts.
- Flexible dashboard layout can include up to four views.
- Drillable Chart objects to inspect Task details
- Design role-based dashboards and assign access to specific users/groups



Operational Dashboards Added To Tasks Card

Operational Dashboards appear as a new tab within the Tasks card

- Worklist
- Tasks
- Alerts
- Overview
- Compliance
- **Operational Dashboards**
- Reports
- Jobs
- Audit



Valid Intersections In Reports

- In Reports, when previewing a report, POV member filtering is enabled for valid intersections, and grid data will only display for valid intersections.

This example shows how the **Product** POV is filtered based on the **Entity** POV selection based on Valid Intersection rules

POV Selections Filtered

Valid Intersection Rules

Entity 403: Sales

Product P_220: Software Suite

P_230 Monitor

P_240 Modem

P_250 Network Card

P_260 Game

P_270 Camera

P_280 Television

Show Invalid Members

Entity 410: International S...

Product P_220: Software Suite

P_200 Accessories

P_210 Keyboard

P_220 Software Suite

P_230 Monitor

P_240 Modem

P_250 Network Card

Show Invalid Members

Entity 421: Sales NorthEast

Product P_220: Software Suite

P_210 Keyboard

P_230 Monitor

P_240 Modem

P_260 Game

P_270 Camera

P_280 Television

Show Invalid Members

403: Sales
No Product Restrictions

410: International Sales
Product <>:
P_260: Game
P_270: Camera
P_280: Television

421: Sales North East
Product <>:
P_250: Network Card

Not displayed

Not displayed



SmartView (Platform) Updates 23.07

Works with SV Client 23.100; 23.200 (Sept/Oct)

- Flex Forms
 - Flex Form Option to Retain Invalid Members in Smart View
- Adhoc
 - View Member Name and Alias in Rows, Even When an Alias Table is Not Used
 - Alias match from across all alias tables
 - Performance Improvement in Zoom In Operations on Multiple Selected Cells
 - Option to retain Invalid Members in Adhoc – 23.08
- Additional Properties Member Information Dialog in Smart View
 - New Member Properties:
 - Generation, Parent MemberName, Child Count, Two pass Calculation, Hierarchy Type, Solve Order, Flow metric, Aggregation level, level, Share, category, Attributed.
 - Properties specific to Dimension type
 - Version: Standard Bottom up, Sandbox Enabled
 - Scenario : Scenario Roll up, Beg Balance, start time period, end Time period, Start year , End year.
 - Account: Exchange Rate Type, Enable445, Sub Account Type, Account Type. Time Balance, variance Reporting.
 - Period : Q1,Q2,Q3,Q4 (Start period , End Period)
 - Attributes Tab: A table of the dimensions, members, and types of attributes associated with the member
 - User Defined Attributes Tab: A list of user defined attributes (attributes of the member defined by the administrator)

POV HR Expenses

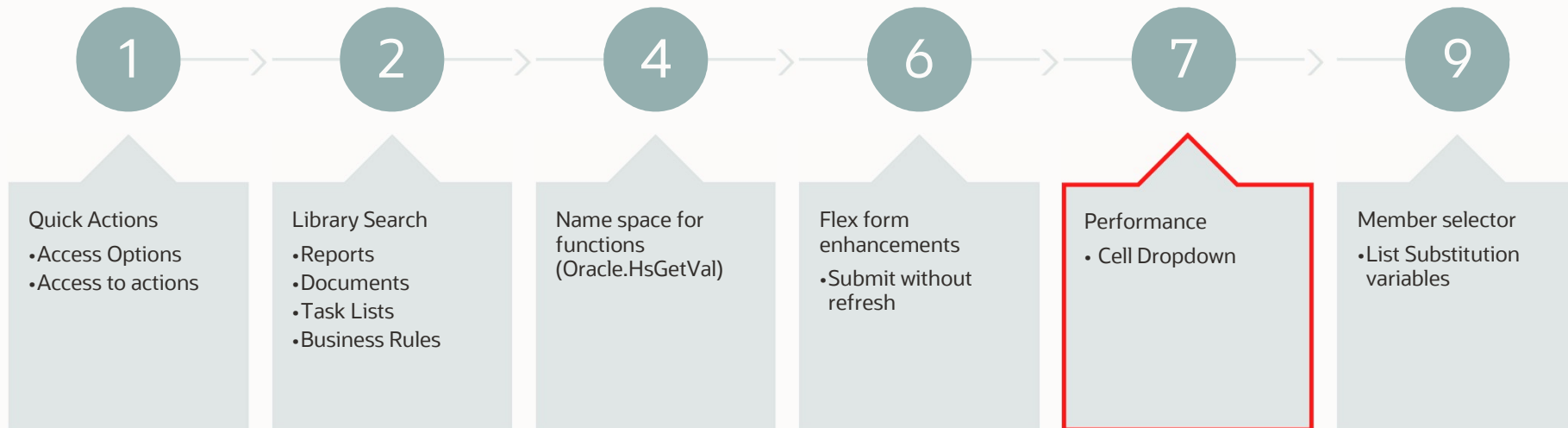
File Working 100 and Administration Management FY23 Refresh

A8 7690: Maels

	A	B	C	D	E
		Jan	Feb	Mar	Q1
1					
2	7110: Advertising	187156	191410	177586	556152
3	7003: Total Office Expenses	187156	191410	177586	556152
4	7640: Airfare				
5	7650: Car Rental				
6	7660: Shipping	26549	27707	25176	79433
7	7670: Accommodation				
8	7690: Maels	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
9	7699: Miscellaneous Travel Expenses	108	36	36	180
10	7005: Total T&E Expenses	26657	27743	25212	79613
11	7001: Total Operating Expenses	213813	219153	202708	635764



Smart View Client Release - 23.200



23.08 - IPM Events

- Events are recurring or one-off pre-defined durations that can be fed to the prediction engine for each run.
- Defining Events allows for these event time periods to be factored during time series predictions so that they are not considered as outliers by the engine during time series predictions
- Events can be recurring like New Years or non-recurring like Covid.
- Events are defined within a calendar.

Benefits:

- Defining Events as recurring, one off or skip events can ensure better prediction accuracy for Predictive Planning, Auto-Predict and IPM Insights

The screenshot displays the Oracle EPM Cloud Planning: Vision interface. At the top, there's a navigation bar with 'ORACLE' and 'EPM Cloud Planning: Vision'. Below this, there are icons for 'Insights', 'Configure', and 'ML Models'. The main section is titled 'Events' and includes a search bar and buttons for 'Import Events' and 'Add Event'. A table lists various events with columns: Name, Description, Type, Calendar, Starts on, Duration, Interval, Occurrences, Active, and Actions. The table contains several entries, including 'BRFJS', 'BRNYS', 'DENYS', 'DEOMS', 'DEPTB20', 'DEPTB21', 'DEYES', and 'IN18W31CY'. A red arrow points to the 'Events' tab in the bottom navigation bar.

Name	Description	Type	Calendar	Starts on	Duration	Interval	Occurrences	Active	Actions
BRFJS	Brazil Festa Junina Season	Repeat	BR_EL_Monthly	FY18->Jun	1	12	FY18->Jun,FY19->Jun,FY20->Jun,FY21->Ju...	☒	...
BRNYS	Brazil New Year Season	Repeat	BR_EL_Monthly	FY18->Jan	1	12	FY18->Jan,FY19->Jan,FY20->Jan,FY21->Ja...	☒	...
DENYS	Germany New Year Travel Season	Repeat	DE_AT_Daily	FY18->D1	15	365	FY18->D1,FY19->D1,FY20->D1,FY21->D1,F...	☒	...
DEOMS	Germany Oktoberfest Travel Season	Repeat	DE_AT_Daily	FY18->D274	31	365	FY18->D274,FY19->D274,FY20->D274,FY2...	☒	...
DEPTB20	Germany Pandemic Travel Ban 2020	Skip	DE_AT_Daily	FY20->D1	730			☒	...
DEPTB21	Germany Pandemic Travel Ban 2021	Skip	DE_AT_Daily	FY21->D1	365			☐	...
DEYES	Germany Year End Travel Season	Repeat	DE_AT_Daily	FY18->D351	15	365	FY18->D351,FY19->D351,FY20->D351,FY2...	☒	...
IN18W31CY	India 2018-W31-Cyclone	One-off	IN_CN_Weekly	FY18->W31	1			☒	...



Other Noteworthy Additions

23.08/23.09

New Application Granular Roles – 23.08

Manage:

- Dashboard
- Reports
- Announcements
- Document Upload (Library & SmartView)
- Role enables
 - Non-Admins to manage dashboards, reports and announcements.
 - Users beyond Admins and Power users to upload documents (20 MB limit)

Copy artifact URL from Navigation Flows – 23.09

Follows:

- Export urls - 22.07
- Copy urls from list view – 23.05

Benefits: urls can be copied into any external application for direct access to an artifact

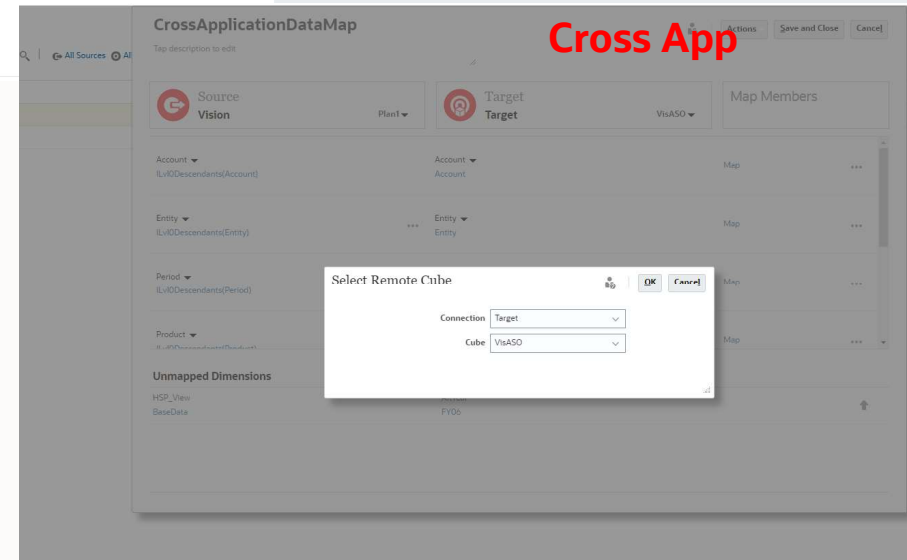
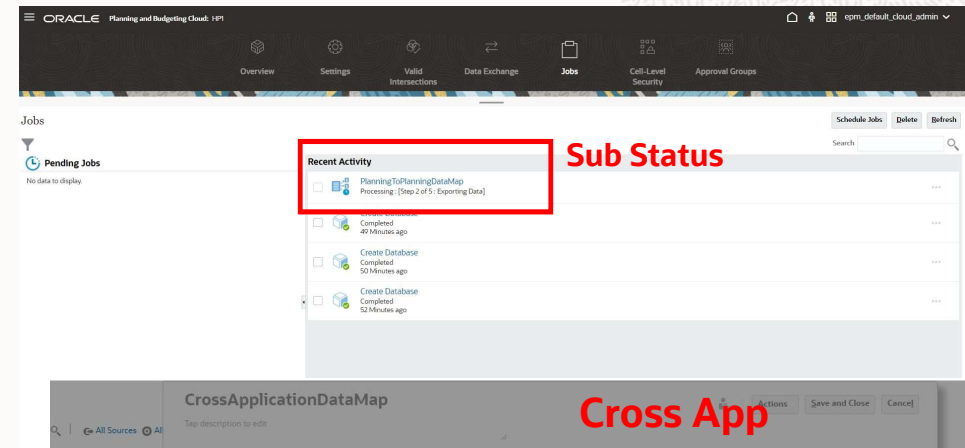
- Emails, Slack, Teams etc.
- Access based on login credentials and permissions defined in application

What's Cooking Q4 CY2023

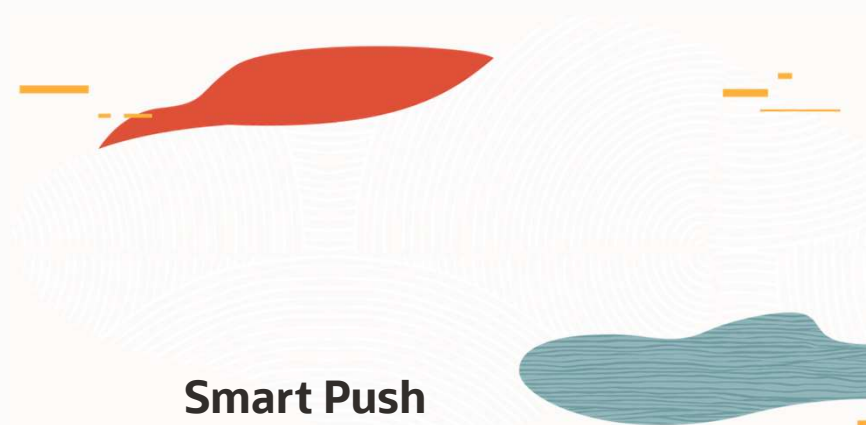


Data Integration - Cross Application Data Maps

- 23.07
 - ASO as a source
- 23.08
 - Performance Optimizations To Cross App Smart Push
 - Better Diagnostics Around Data Map/Smart Push Progress Using Job Sub-status
- 23.09/23.10
 - Cross App Data Maps
 - Businesses scale their connected deployments across the globe,
 - Facilitate data collaboration across these lines of business and regions with real time (smartpush) and mass data exchange across their applications using cross app data maps.
 - Across Planning Apps & EPCM
 - Close and Tax can be a target not a source
- Q1 CY2024
 - Attribute support in Data Maps



Data Integration Implementation Guideline



Data Integration

- For inbound and outbound external data integration
- Drill down to source data from EPM
- Rule based mapping of metadata for data integration
- Many to one mapping push
- High volume automation

Data Map

- Pure EPM cloud data movement
- Similar to replicated partitions
- Mapping smart lists to dimensions
- Synchronization of data across cubes and apps or from / to strategic models
- Reporting use cases

Smart Push

- Trickle feed data for real time reporting
- Synchronize cell commentary, supporting details between the 2 cubes
- Real time data synchronization
- Instant data movement based on user changes

The background is a dark teal color with a subtle texture. In the top left corner, there is a stylized illustration of a hand with fingers spread, colored in light beige and blue. Below the hand, there are some blue, rain-like streaks. In the bottom right corner, there are abstract, organic shapes in shades of orange, beige, and blue, some with concentric line patterns. A small red square with a white 'O' logo is located in the bottom right corner.

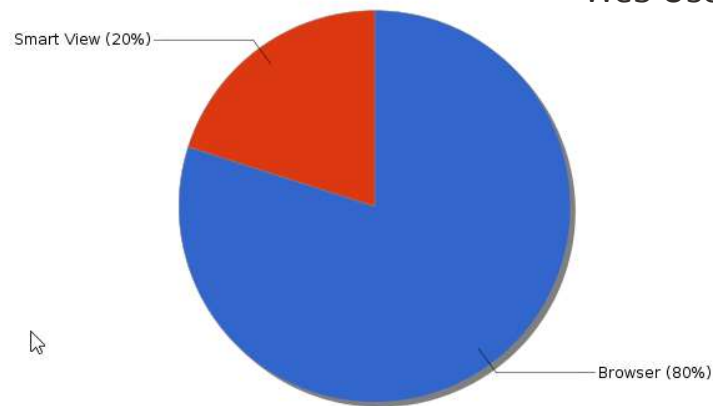
Forms 2.0 & Dashboards 2.0

In Redwood Experience Only

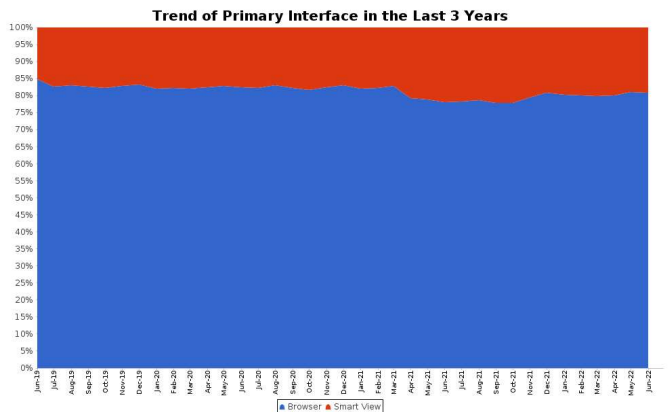
Why Are Web-Forms & Dashboards Important?

- 80% of users spend time on Web
- Web Users spend 80+ % of their time on Forms & Dashboards

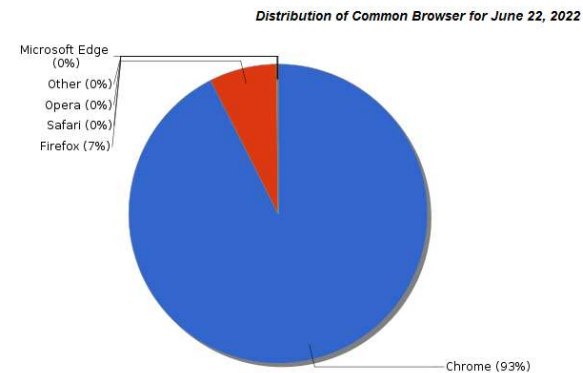
As of Feb 2023



Category	Percentage
Browser	80
Smart View	20



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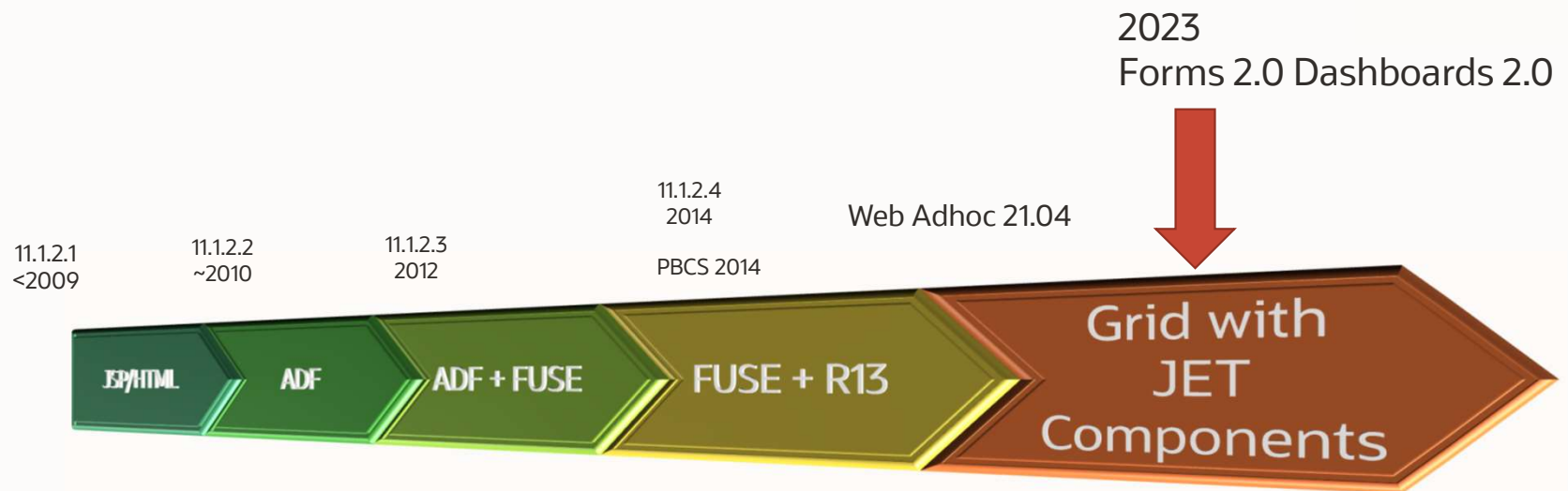


Category	Percentage
Chrome	93
Firefox	7
Safari	0
Opera	0
Chrome Mobile	0
Microsoft Edge	0



EPM Cloud Platform Grid Milestones

Technology Innovation Journey



Forms 2.0 and Dashboard 2.0

- What is changing
 - **Forms 2.0**
 - Form Grids will adopt new technology and user interface in Redwood theme only
 - **Dashboards 2.0 will start supporting Forms 2.0**
 - Will include write enabled Forms
 - Migration from Dashboards 1.0 will be provided
- **Business Processes**
 - **Benefiting**
 - Planning – Custom, Modules
 - FreeForm
 - Close
 - Tax
 - EPCM
 - **Not Impacted**
 - EDM, Acct Reco, Narrative Reporting
 - Strategic Modeling (Planning) - In 2024 Roadmap

Only in Redwood Theme

- Nimbleness and improved usability
 - More vertical spacing and lots of clean ups
 - Fast Cell to Cell navigation
 - Quick scrolling across data grids
 - New POV drop downs with new member selector
 - Reduced popups
 - Action Menus for Form actions
- Calc on the Fly on the grid

ORACLE

EPM Cloud Planning - Vision

Admin

Home

Tools

Help

Overview

Settings

Valid Intersections

Data Exchange

Jobs

Services

Task Manager

Ctrl Level Security

Approval Groups

Notifications

Task Lists

Approvals

Job Console

Digital Assistant Settings

Channel Id

Service Name

Web Ad Hoc Grid

Suppression Missing also Suppress...

Enable User Formulas In Ad Hoc

Filter Out Excluded Members in Segment Dropdown

Farms Mode

Predictive Planning

Prediction Interval (Worst and Best Cases)

Prediction Cube

Select a cube.

Suppression Mode

Smart View Ad Hoc Behavior

Link Accounts by Default

Attribute Dimension

Re-order Threshold

Set Reporting Options

Report Settings

Switch to each cube to update their settings

Source Cube

POV

Oracle EPM Cloud Planning: Vision

Tasks Dashboards Infolets Data Reports Rules Approvals Academy

Long Range Plan Drivers

Entity: No Department Version: Baseline Scenario: Plan

	FY22	FY23	FY24
Shares Outstanding	10,000	17,813,111	32,233,495
EPS	1.27	1.31	1.60
Total Capital in MM	1,052,110,346	1,046,769,396	1,036,363,296
ROIC	13.53%	19.02%	16.97%
Interest Coverage	4.39	4.95	6.13
Debt/Capital %	80.42%	61.04%	59.29%
Excess Debt	20	0	0
Credit Rating Value	8	7	6
Credit Rating	A-	A	B+
Value per Share	31.62	38.02	37.77
Current Stock Price	39.25	39.25	39.25

Data Expense Trends x Long Range Plan Drivers x

Oracle EPM Cloud Planning: EPBCS

Revenue Plan

Entity: USA Category: All Category Scenario: Working Period: FY21

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov
Total	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Phones	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000
Laptop	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Computer	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000
Headphone	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000
Controllers	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Games	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000
Desk	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Music	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000
Diana Marakus	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000
Chris Holden	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000	\$125,000
Allan Schoenberger	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000	\$210,000
Kelly Manning	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000	\$75,000

Data Revenue Adhoc Grid

Cancel Save Actions Submit Data Only

Adhoc User Options

Grid

- Member Inclusion
- Include Selection Yes
- Within Selected Group No
- Zoom In Next Level
- Ancestor Position Bottom
- Indentation Subitems
- Navigate Without Data No

Forms 2.0 - Technical Highlights

- Rearchitected and built with [Oracle JET](#)
- Stateless protocol for data retrieval
- Improvements in
 - Expand collapse
 - POV bar dropdown
 - Member selector tree hierarchy
- 4-5x quicker refresh time on large grids
- Consistency between Web and SmartView protocols
 - Allows for faster adoption and synchronization of future enhancements
- Improvements in Web Adhoc

Forms 2.0 – Usability Improvement Highlights

- Reduce clicks and remove popups
- Clean new icons and dialogs
- POV drop down and selection and Search
- Tree based member selector and search
- Built in line-item detail
- Wizard based RTP drawers

Forms and Dashboards in EPM Platform

What We Have Today

- Forms 1.0
 - Run time
 - Slick grid using ADF Fuse components
- Dashboards 1.0
 - ADF based
 - Read-Write-Calculate
- Dashboard 2.0
 - Charts only
 - Uses Oracle Jet

What we will have in Q4 CY2023

- Forms 1.0
 - Run time
 - Slick grid using ADF Fuse components
- Forms 2.0
 - Run time impact only
 - Slick Grid with Jet components using stateless protocol
- Dashboards 1.0
 - ADF based
 - Read-Write-Calculate
- Dashboard 2.0
 - Charts and Grids
 - Read-Write-Calculate
 - Slick Grid with Oracle Jet Components

Forms 2.0 – Things to Note

- On Redwood Theme Only
- Application-level setting options to switch between Forms 1.0 and Forms 2.0
 - Forms (1.0) default for existing pods
 - All newly created environments will default to Forms 2.0
- ***No migration needed from Forms 1.0 - this is run time change only.***
- ***No Form redesign needed.***
- Setting can be switched anytime between Forms (1.0) and Forms 2.0
- Setting is app specific and can vary across apps

All future Web Form enhancements will only be in Forms 2.0


 EPM Cloud Planning: EPBCS




 shankar viswanathan

Tasks
Dashboards
Infolets
Data
Reports
Rules
Approvals
Academy

Plan vs Target - New Product ⓘ									
Market All Market	Period Year Total	Entity Sales US	Reporting Currency USD	Target Scenario Expansion					
		FY23	FY23	FY23	FY24	FY25	FY26		
		Target	Working	Target	Target	Target	Target		
		Expansion	Plan	Plan	Plan	Plan	Plan		
SmartPhones	Product Revenue	406,697,679	347,940,994		347,940,994				
Tablets	Product Revenue	215,888,541	172,792,884		172,792,884				
Notebooks	Product Revenue	173,414,420	147,992,686		147,992,686				
Computer Accessories	Product Revenue	0	13,091,775						
All Product	Product Revenue	735,935,058	681,818,339	735,935,058					
	Services Revenue	23,847,320	16,000,000	23,847,320					
	Support Revenue	27,000,000	27,102,007	27,000,000					
	Other Revenue		4,100,000						
	Adjustments to Revenue	73,593,506	58,090,555	73,593,506					
	Total Revenue	713,188,872	670,929,791	713,188,872					
	Total Cost Of Sales	448,465,956	395,812,330	448,465,956					
	Gross Profit	264,722,917	275,117,461	264,722,917					

Row Column FY23 Target Expansion:
This cell is read-only

Forecast Revenue

[illegible]

Data Forecast Revenue

Dashboard 2.0 with Grids

Only in Redwood Theme

- Dashboards 2.0 includes write enabled Grids (Forms 2.0)
- Dashboard 2.0 will have grid display option when
 - Redwood Experience is enabled
 - Forms 2.0 is chosen in Application Settings
- Support for URL / Commentary
- Conversion from Dashboards 1.0 to 2.0
- All future Dashboard enhancements will be only within Dashboard 2.0
- Customers can continue to use Dashboards 1.0 with Forms 1.0

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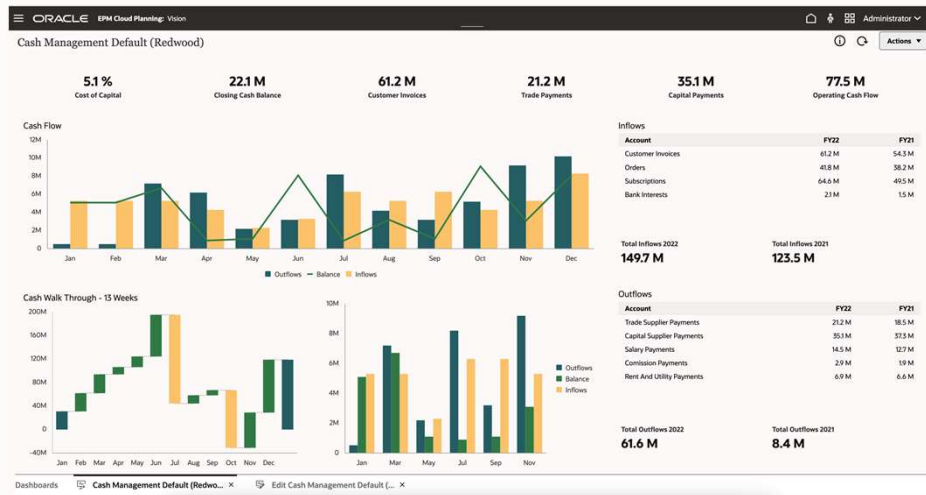
Dashboard 2.0

Includes Write Enabled Forms 2.0

- Migration from Dashboards 1.0 will be provided
- When App setting is set to Forms 1.0 (current; default for existing customers)
 - Customers can continue to use Dashboards 1.0 with Forms
 - No Forms in Dashboard 2.0
 - Forms will show up as it does now; table views/charts when used within Dashboard 2.0
 - To use Forms as grids in dashboard 2.0, you must set application settings to Forms 2.0
- When App setting is set to Forms 2.0
 - Customers can continue to use Dashboards 1.0 with Forms
 - Dashboard 2.0 will support Forms 2.0 with read/write and calculate
 - Forms within Dashboards 1.0 will appear as Forms 1.0

Introducing Dashboards Styles

Redwood (Default)



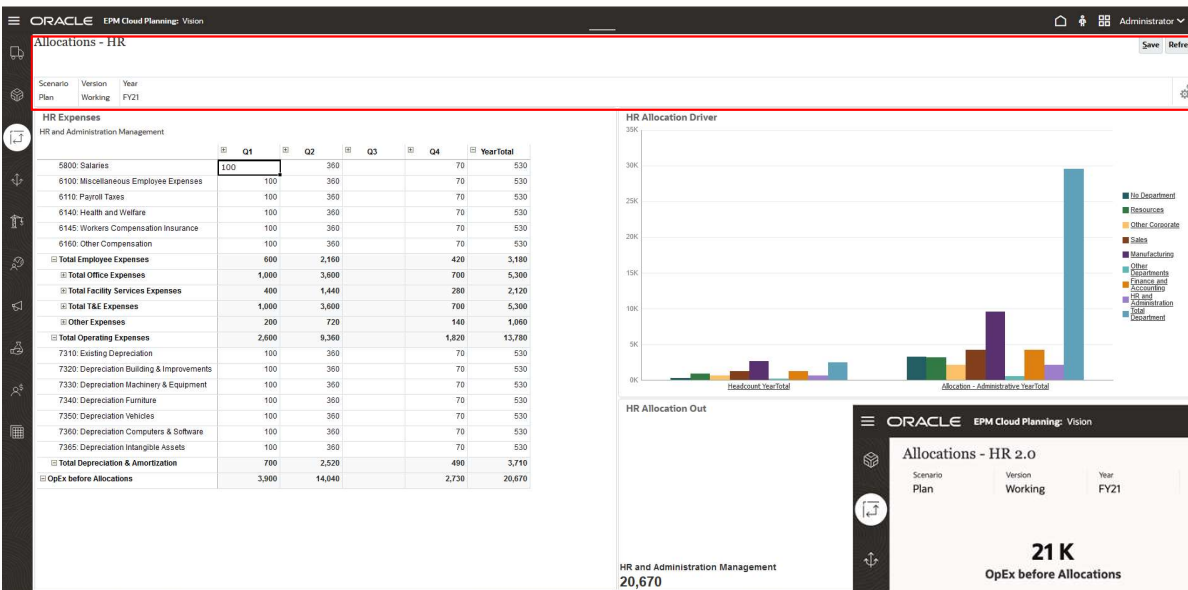
Light



Dark

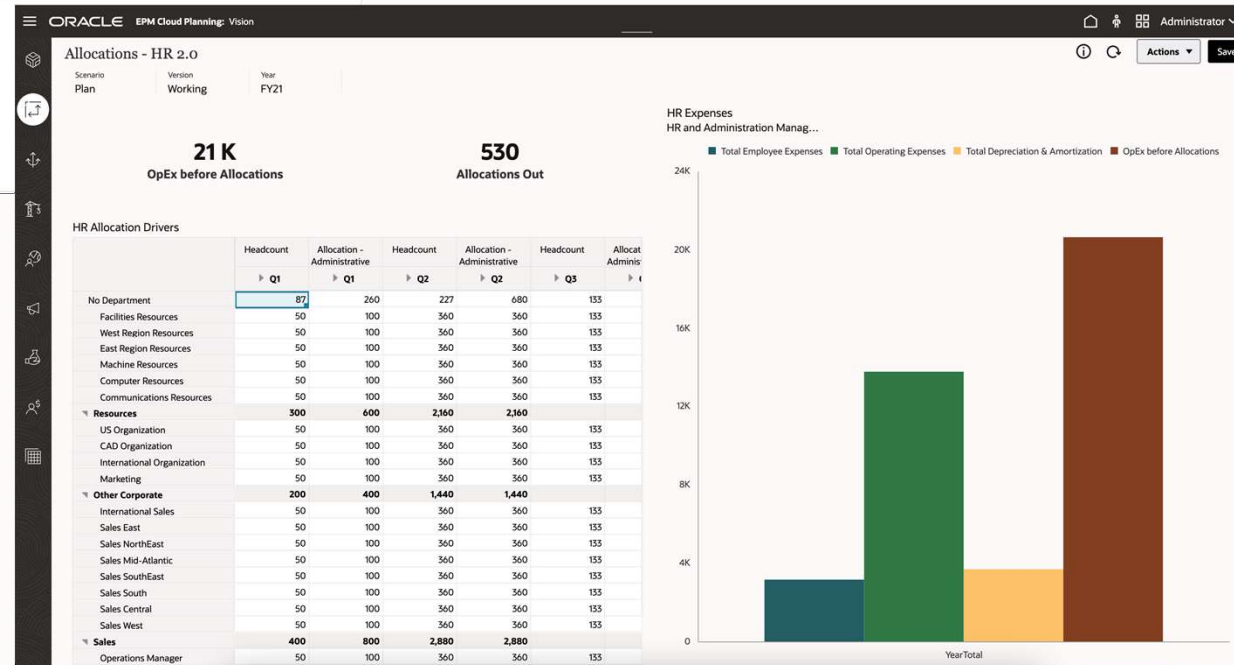


Before & After Dashboard Changes



Before

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ORACLE

EPM Cloud Planning: Vision



Administrator

Untitled Dashboard

Entity
USA

Category
All Category

Products
All products

Scenario
Working

Period
FY21



Save



Cubes



Search



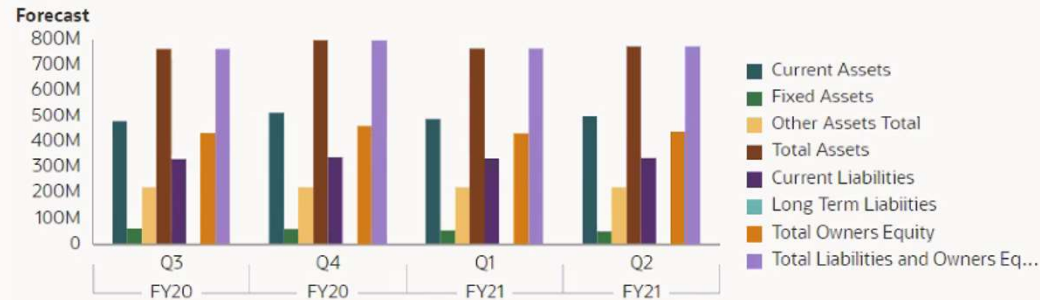
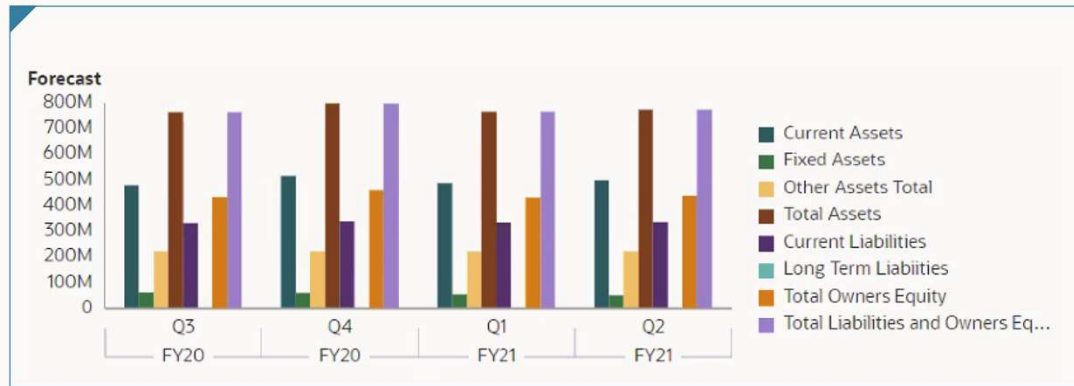
Plan1

Plan1

Plan1

Plan1

Plan1



General

Name Yes

Description No

Borders Next Level

POV bar Bottom

Global POV Bar Yes

Background

Style Light

Good Dashboard Practices White Paper*

- Two types of dashboard usage
 - Visualization Oriented - KPI Dashboards Or Executive Summary Dashboards
 - Feedback Loop - Data Entry / Analysis Dashboards
 - Provide Examples & Guidelines
 - References And Do's And Don'ts Will Be Provided
 - Will Contain Examples With Help From Demo Team
-
- * Work In Progress – Targeted To Be Out Along with V1.

On the Fly Calc on Grid

- Enable at the form level using check box
- Instant Member formula and outline math calc on grid
 - Emulates a save to Essbase
 - Calcs on the fly in the grid bypassing Essbase.
 - No wait time to Calc and reload grid.
- Using outline math and member formulas, grid-based formulas are created and evaluated in the browser when a value on the user's current grid is changed.
- This allows cells' values to be recalculated based on a formula without saving to Server/Essbase.
- Support several Essbase functions and Excel functions
- Enablement
 - Close and Tax will be supported later this year.
 - Open to all app types – PBCS, EPBCS, PBCS+1, Standard, Enterprise – Custom, Modules, FreeForm
 - Only BSO w/wo Hybrid. ASO is not supported at this time.



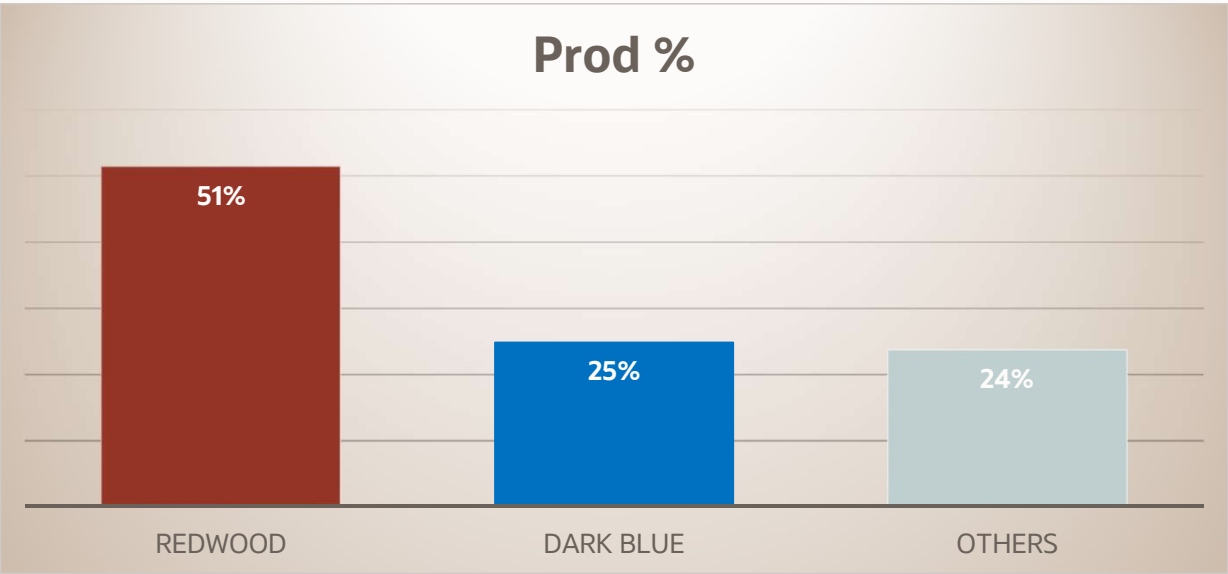
Forms 2.0 and Dashboard 2.0 Showcase

Redwood Experience



EPM Cloud Theme Usage

Redwood Theme Adoption across EPM Cloud ~51%



- Dark Blue Theme was default theme when PBCS was launched in 2014.
- New Pods defaulted with Redwood theme in 2019.
- Non-Redwood /Dark-Blue Themes have very low adoption.
- Customers most often deploy default themes on their pods.
- Customers rarely change their theme over time.
- Customers use different themes to differentiate Test Pods from Production Pods

Stats as of Feb 2023

Theme	%
Aquamarine	0%
Autumn Red	1%
Bright Blue	1%
Crisp Green	2%
Dark Blue	25%
Dark Grey	1%
Light Blue	3%
Midnight Blue	1%
Redwood	51%
Sky Blue	8%
Steel Grey	2%
Turquoise	1%
Unknown	1%
Vanilla	2%
Total	100%

Redwood Experience - Dark and Light Options

Recent innovations are Redwood Theme specific

- Dynamic Tabs
- Adhoc 2.0 on Web
- IPM Insights

- Future innovations in the Redwood Theme only.
- Deploy using only Redwood.
 - Cloud Customer Connect April 2023: EPM – Why You Should Be Using The Redwood Theme in EPM Cloud.
- Towards end of CY2023, within the Redwood Experience, we will offer a Default 'Oracle' Theme and two additional appearance options: 'Custom Light' and 'Custom Dark'.
 - Appearance will be shifted to use the default Oracle Theme or Custom Dark Theme based on currently deployed background appearance in those pod.
 - Pods with non-Redwood theme appearance will not be impacted in CY2023.
- In a later update (planned towards Q1 CY2024), there will be an appearance switch over plan for pods using non-Redwood theme.

Redwood Experience - Dark & Light Options

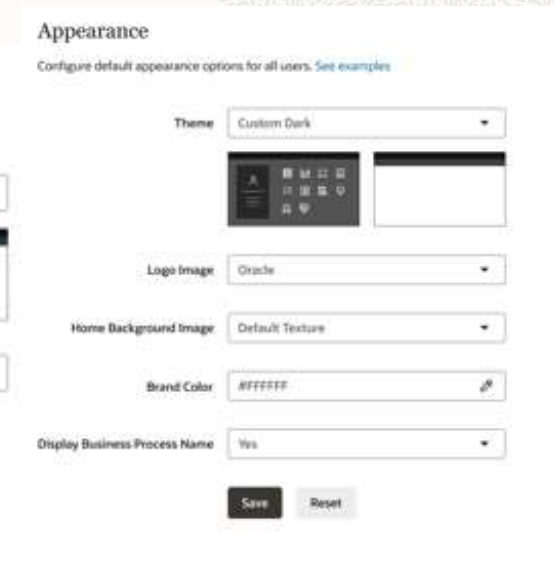
- Default Oracle Theme and new Dark and Light Themes
- Light background image/color support
 - Dark Fonts
 - Dark Images
 - Dark Icons
 - Dark Branding
- Compact Design
 - Better Utilization of Screen Real Estate
 - More vertical spacing for screens
- Appearance adaptation based on current background



Appearance
Configure default appearance options for all users. [See examples](#)

Theme:

Display Business Process Name:



Appearance
Configure default appearance options for all users. [See examples](#)

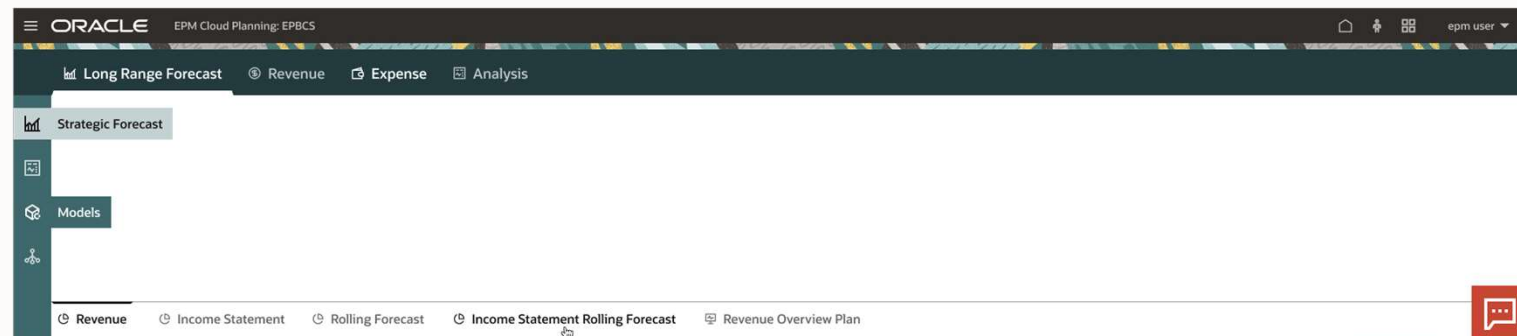
Theme:

Logo Image:

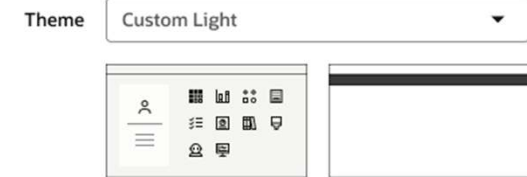
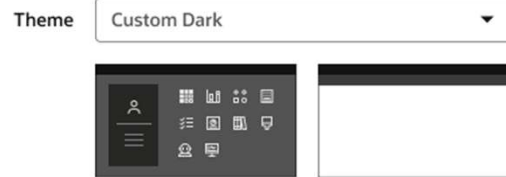
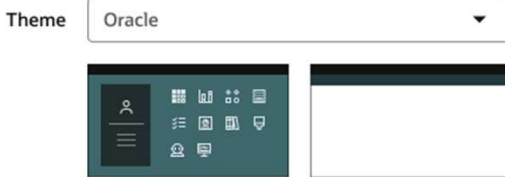
Home Background Image:

Brand Color:

Display Business Process Name:



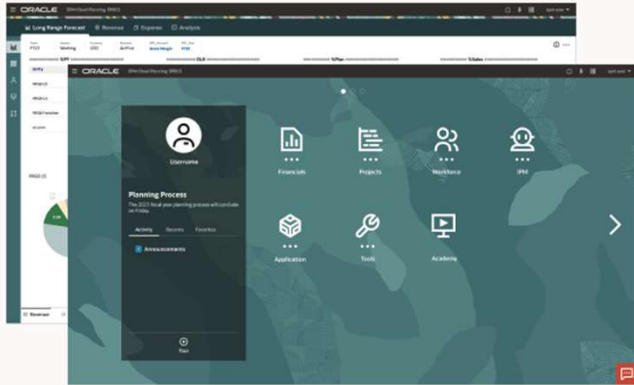
Appearance Shift Plan to Redwood



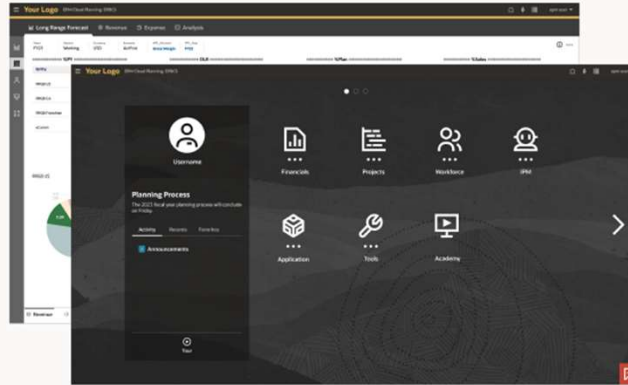
Legacy Setting	New Setting	Comments
Redwood Experience w/ predefined logo and background	Oracle	global header strip remains dark, home icons remain white
Redwood Experience w/ customized logo or background	Custom Dark	global header strip remains dark, home icons remain white
Sky Blue	Custom Light	global header switches from light image bg to solid white, home icons remain dark
Dark Blue	Custom Dark	global header switches from dark image bg to solid dark, home icons remain white
Light Blue	Custom Light	global header switches from light image bg to solid white, home icons remain dark
Crisp Green	Custom Light	global header switches from light image bg to solid white, home icons remain dark
Dark Grey	Custom Dark	global header switches from dark image bg to solid dark, home icons remain white
Bright Blue	Custom Light	global header switches from light image bg to solid white, home icons remain dark
Steel Grey	Custom Dark	global header switches from dark image bg to solid dark, home icons remain white
Aquamarine	Custom Dark	global header switches from dark image bg to solid dark, home icons remain white
Autumn Red	Custom Dark	global header switches from dark image bg to solid dark, home icons remain white
Midnight Blue	Custom Dark	global header switches from dark image bg to solid dark, home icons remain white
Turquoise	Custom Light	global header switches from light image bg to solid white, home icons remain dark
Vanilla	Custom Light	global header switches from light image bg to solid white, home icons remain dark



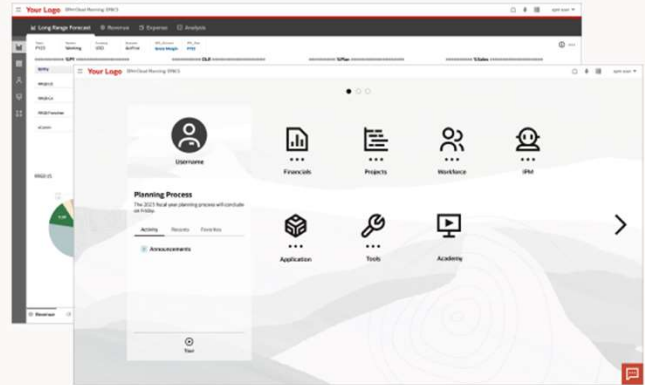
Oracle theme



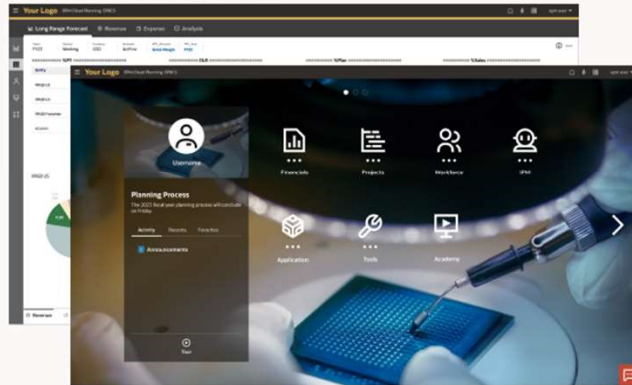
Custom dark theme



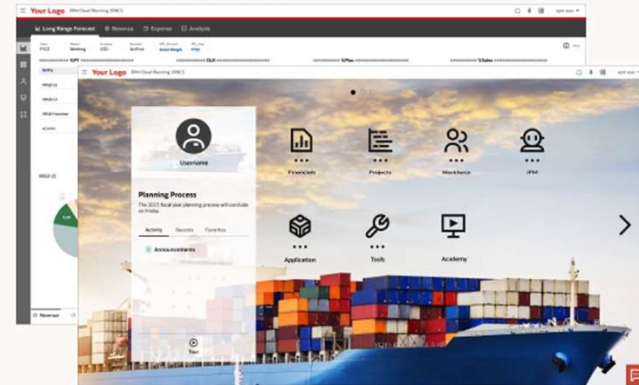
Custom light theme



Custom dark theme with background photo



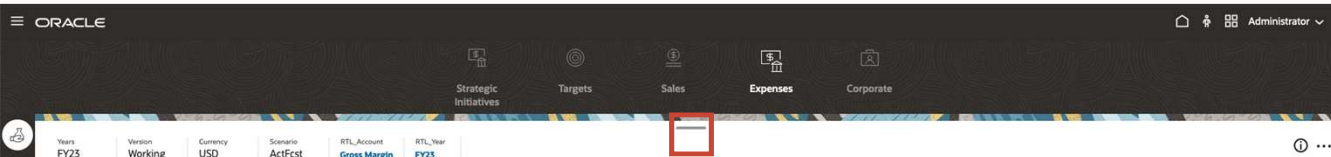
Custom light theme with background photo



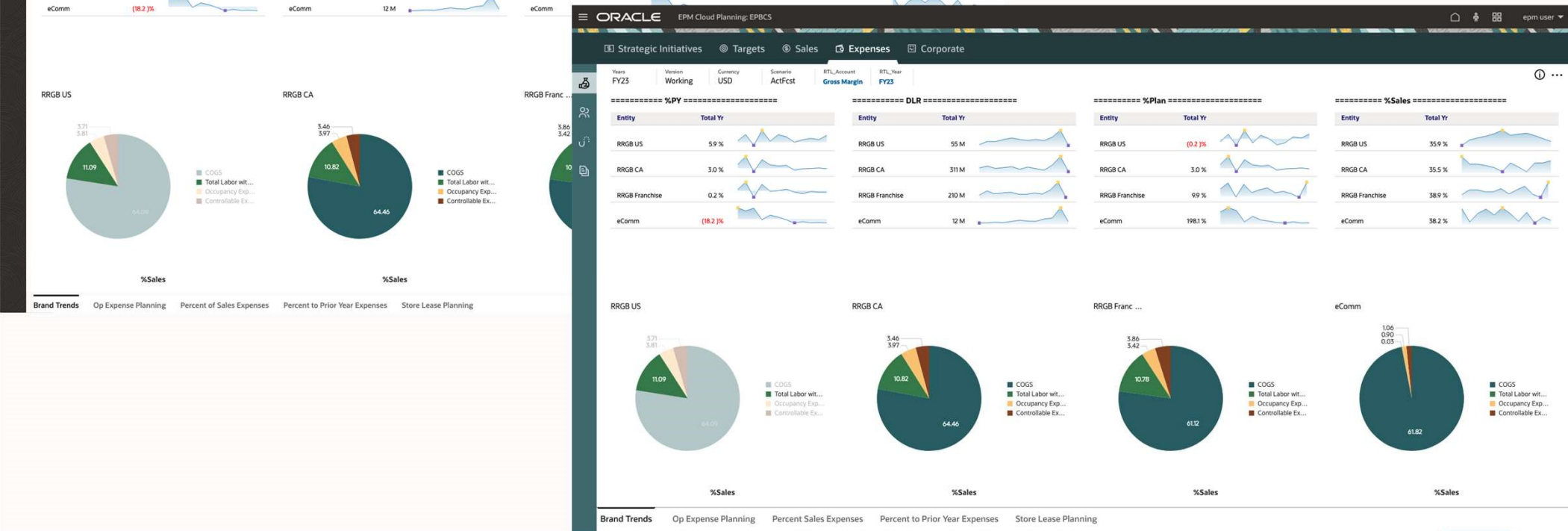
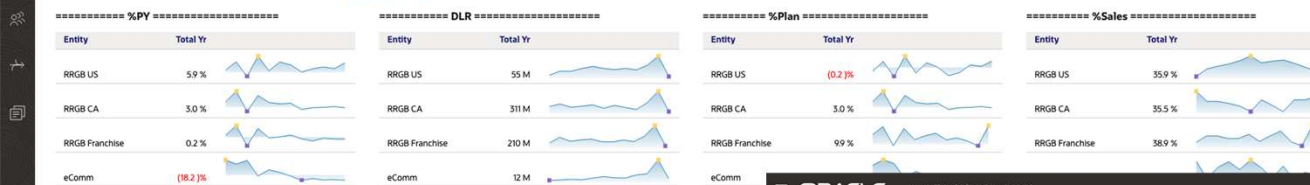
Close



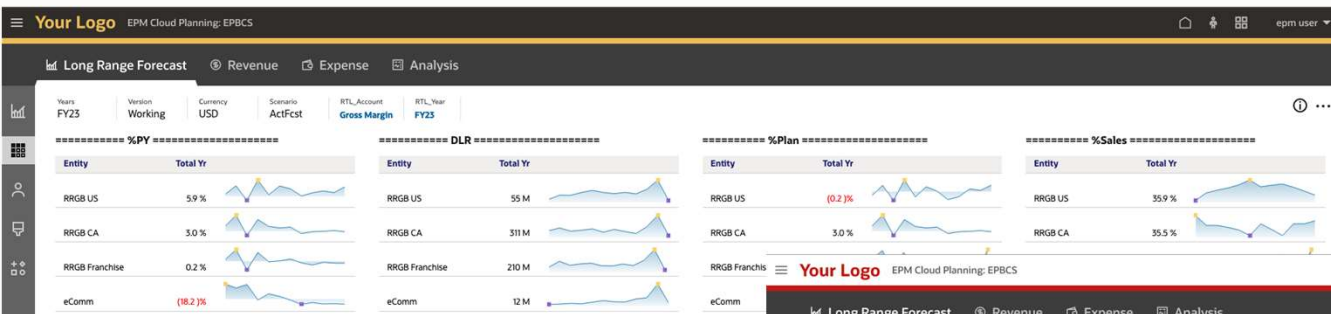
Before and After Compact Header Change



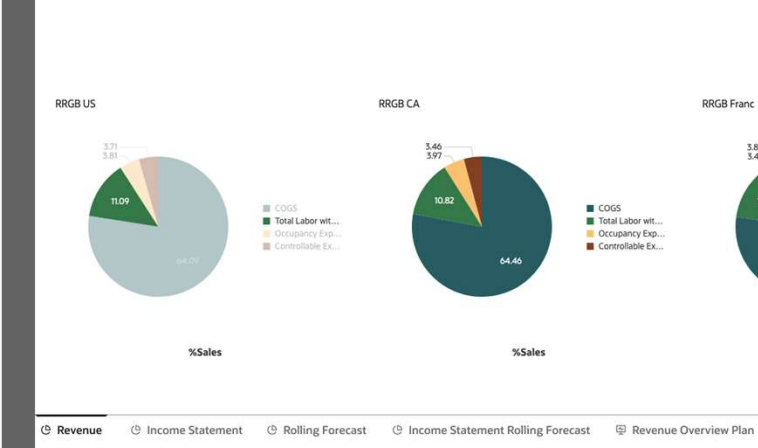
Improved Space Utilization
No expand /collapse needed



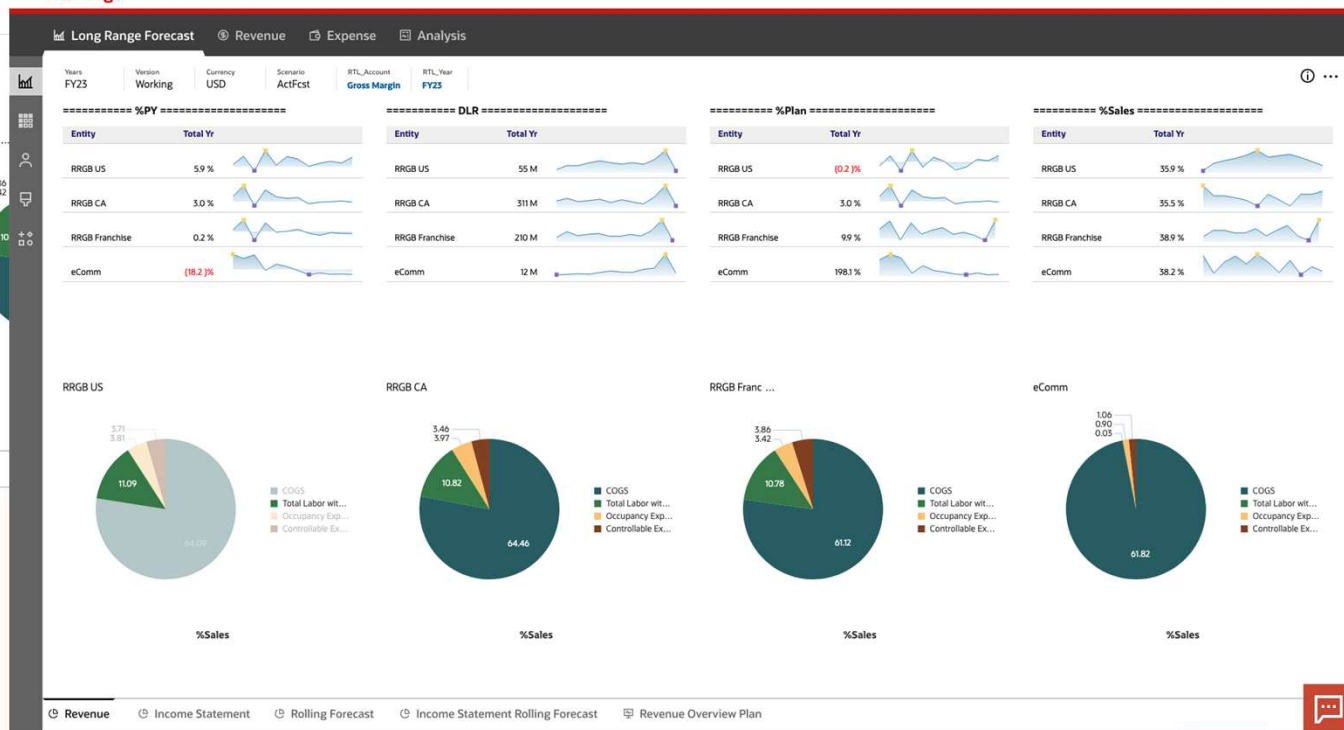
Compact Header with Dark and Light Themes



Dark Background Theme



Light Background Theme



Enterprise Journals With Compact Header

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EPM Cloud Financial Consolidation and Close: VisCnd

Administrator

TasksInfoletsDataConsolidation JournalsEnterprise JournalsReportsApprovalsRulesAcademy

Journals

SearchView

Year2022PeriodJunTemplateAllStatusOpenAdd a Filter

7 Items

Template	Journal Name	Journal ID	Status (Detailed)	Preparer	Start Date	End Date
Cloud Financials	JE_TransferPrice_UK	1000000002	With Approver Level 1	Amy Marlin	May 26, 2022	
Cloud Financials		1000000003	With Preparer	Anita Kennedy	May 26, 2022	
Cloud Financials	TaxProvision	1000000004	With Approver Level 1	Kerry Lane	May 26, 2022	
Cloud Financials	JE_TaxProvision	1000000005	With Approver Level 1	Casey Brown	May 26, 2022	
Cloud Financials	TransferPrice_UK	1000000006	With Approver Level 1	Kerry Lane	May 26, 2022	
EBS	EBS_Reclass Commissions	1000000010	With Approver Level 1	Casey Brown	Jun 23, 2022	
SAP FI	SAP_ExpenseTransfer	1000000011	With Approver Level 1	Casey Brown	May 26, 2022	

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EPM Cloud Planning: EPBCS

epm user

TasksInfoletsDataConsolidation JournalsEnterprise JournalsReportsApprovalsRulesAcademy

Journals

SearchView

Year2022PeriodJunTemplateAllStatusOpenAdd a Filter

7 Items

Template	Journal Name	Journal ID	Status (Detailed)	Preparer	Start Date	End Date
Cloud Financials	JE_TransferPrice_UK	1000000002	With Approver Level 1	Amy Marlin	May 26, 2022	Jul 7, 2022
Cloud Financials		1000000003	With Preparer	Anita Kennedy	May 26, 2022	Jul 7, 2022
Cloud Financials	TaxProvision	1000000004	With Approver Level 1	Kerry Lane	May 26, 2022	Jul 7, 2022
Cloud Financials	JE_TaxProvision	1000000005	With Approver Level 1	Casey Brown	May 26, 2022	Jul 7, 2022
Cloud Financials	TransferPrice_UK	1000000006	With Approver Level 1	Kerry Lane	May 26, 2022	Jul 7, 2022
EBS	EBS_Reclass Commissions	1000000010	With Approver Level 1	Casey Brown	Jun 23, 2022	Jun 27, 2022
SAP FI	SAP_ExpenseTransfer	1000000011	With Approver Level 1	Casey Brown	May 26, 2022	Jul 7, 2022



Task Manager with Compact Header

Cloud Financials

Year 2022

Period Jun

Journal ID 1000000002

Prepared By Amy Marlin

Validation Status Not Validated

Post Status Not Posted

Header

Journal Name JE_TransferPrice_UK

Entered Currency USD

Journal Description Transfer Pricing Allocation t

Accounting Date Jun 22, 2022

Created Date Jun 22, 2022

Line Item Details

	Line Number	Cloud Fin Company	Cloud Fin Account	Cloud Fin Cost Center	Cloud Fin Product	Cloud Fin Intercompany
1	1	101	18100	000	000	303
2	2	101	18100	000	000	303
3	3	101	18100	000	000	303
4	4	101	43000	000	000	303
5	5	101	43000	000	000	303
6	6	101	43000	000	000	303
Total						

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EPM Cloud Planning: EPBCS

Tasks

Infolets

Data

Consolidation Journals

Enterprise Journals

Reports

Approvals

Rules

Academy

Cloud Financials

Year 2022

Period Jun

Journal ID 1000000002

Prepared By Amy Marlin

Validation Status Not Validated

Post Status Not Posted

Header

Journal Name JE_TransferPrice_UK

Entered Currency USD

Journal Description Transfer Pricing Allocation t

Accounting Date Jun 22, 2022

Created Date Jun 22, 2022

Line Item Details

	Line Number	Cloud Fin Company	Cloud Fin Account	Cloud Fin Cost Center	Cloud Fin Product	Cloud Fin Intercompany	Debit	Credit	Line Description
1	1	101	18100	000	000	303	8,975,609.80		IC AR - UK allocated charges revenue driven (R0012)
2	2	101	18100	000	000	303	685,202.57		IC AR - UK allocated charges headcount driven (R0013)
3	3	101	18100	000	000	303	483,040.62		IC AR - UK Intercompany Allocation Mark Up Revenue (R0019)
4	4	101	43000	000	000	303		8,975,609.80	IC Rev- UK allocated charges revenue driven (R0012)
5	5	101	43000	000	000	303		685,202.57	IC Rev - UK allocated charges headcount driven (R0013)
6	6	101	43000	000	000	303		483,040.62	IC Rev- UK Intercompany Allocation Mark Up Revenue (R0019)
Total							10,143,852.99	10,143,852.99	

Redwood Theme 1 Year Roadmap

2nd Half CY 2023

- Forms 2.0 and Dashboards 2.0 with Forms 2.0 support
- More spacing for bottom tabs (to accommodate url display)
- Crisper Icons display
- Styles for different color & shade combinations in dashboard
- New Jobs Listing Page
- Consistent Search, Filter, Sort on Listing Pages

1st Half CY 2024

- Uniform Dark/Light Style Support
 - One place to impact color & styles across the application
- Consistent Library across applications
- Dynamic Tab and new form grid support for Strategic Modeling
- Better Screen Real Estate
- Dynamic Tab Support across other components



1st Half CY2024

More User Interface Improvements

Enhanced Job Listing

Only in Redwood Theme

Robust Search & Filter
Unified listing and sorting

- Job Name
- Job Type
- Status
- Username
- Start & Elapsed Time, Progress

ORACLE EPM Cloud Planning: Vision

Administrator

Jobs

Q Start Time 8/21/22, 12:00 AM X Search

Job ID 8 Job Type 8 Job Name 8 User Name 8 End Time 8 Status 8

14 Items + [Icons]

Pending Active [Icon]

Job ID	Job Type	Job Name	Custom Name	User Name	Start Time	End Time	Elapsed Time	Status	Progress	Actions
☐ JD_66723 VII	Rule	Run Employee Data	Name	Chenchen Liu	8/21/22, 4:09 PM	TBD	TBD	Processing	Step 5 of 20	...
☐ JD_688723 VII	Refresh Data Base	Create Data Base	Name	Mike Torre	8/21/22, 4:09 PM	TBD	TBD	Processing	Step 5 of 20	...
☐ JD_36723 VII	Refresh Data Base	Refresh Database	Name	Chenchen Liu	8/21/22, 4:09 PM	8/21/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JD_66723 VII	Refresh Data Base	Run Employee Data	Name	Ammy Wisner	8/21/22, 4:09 PM	8/21/22, 4:09 PM	00:03:09s	Completed with Warnings	Step 20 of 20	...
☐ JD_60723 VII	Rule	Run Employee Data	Name	Chenchen Liu	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JD_65723 VI	Rule	Run Employee Data	Name	Chenchen Liu	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JD_56723 VII	Rule	Run Employee Data	Name	Chenchen Liu	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JD_64723 VII	Refresh Data Base	Run Employee Data	Name	Ammy Wisner	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JD_22723 VII	Rule	Run Employee Data	Name	Rahul Patel	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JW_66723 VII	Refresh Data Base	Run Employee Data	Name	Rahul Patel	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JD_66723 VII	Rule	Run Employee Data	Name	Chenchen Liu	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JW_66723 VII	Refresh Data Base	Run Employee Data	Name	Rahul Patel	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JD_66723 VII	Rule	Run Employee Data	Name	Chenchen Liu	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...
☐ JW_66723 VII	Refresh Data Base	Run Employee Data	Name	Rahul Patel	8/20/22, 4:09 PM	8/20/22, 4:09 PM	00:03:09s	Completed	Step 20 of 20	...



New Listing Pages

Only in Redwood Theme

Fast efficient Search & Filter
Consistent Look and Feel
Multiple sort orders
Default Listing Pages

- Dashboards & Infolets
- Data – Forms, Adhoc
- Reports
- Rules – **Includes Rules Edit**
- Documents

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The image displays three screenshots of the Oracle EPM Cloud Planning EPBCS interface, showcasing the new listing pages in the Redwood Theme.

Top Screenshot: Data Listing Page

The top screenshot shows the "Data" listing page. It features a search bar at the top right with "Create" and "Refresh" buttons. Below the search bar, the page indicates "Type: Folder 12", "Form 2", "Last Modified: 2/15/23 14", and "Last Modified by: Administrator 14". The main content area displays "14 results" in a table format. The table has columns for Name, Folder Path, Type, Description, Created, Last Modified, Last Modified by, and Actions. The data rows include folders like "Capital", "Custom", "Dashboards 2.0", "EPBCS", "EPM Demo Reports", "EPM Overview", "Exchange Rates to USD", "Financials", and "Flex Forms", all pointing to a "Library" folder path.

Middle Screenshot: Rules Listing Page

The middle screenshot shows the "Rules" listing page. It has a search bar and a "Validate" button. The page indicates "Type: Rule", "Cube: Plan1", and "Last Deployed: 04/10/2023 04:18 AM". The main content area displays "10 results" in a table format. The table has columns for Name, Type, Description, and Actions. The data rows include rules like "Aggregate", "Aggregate Actuals", "Aggregate HCM", "Allocate HCM Expenses", "Calculate Actual Balance Sheet", "Calculate Tax", "Clear Actuals", "Clear Adj Forecast", "Remove Asset", "RemoveLeasedAsset", "Calculate All Expenses", "Calculate Expenses", "Calculate Imported Projects", "Calculate Project", and "Calculate Project Benefits", all of type "Rule".

Bottom Screenshot: Rules Validation Messages

The bottom screenshot shows the "Rules Validation Messages" dialog box. It displays a list of errors and warnings. The messages include:

- Calculate Expenses 2 Errors, 4 Warnings
- Calculate Imported Projects 1 Error
- Calculate Project Benefits 1 Error
- Calculate Revenues 1 Error
- Calculate Tax 4 Warnings
- Clear Adj Forecast 4 Warnings
- Remove Asset 4 Warnings
- RemoveLeasedAsset 4 Warnings

Unified Library

Only in Redwood Theme

Unified Folder/Artifact Listing

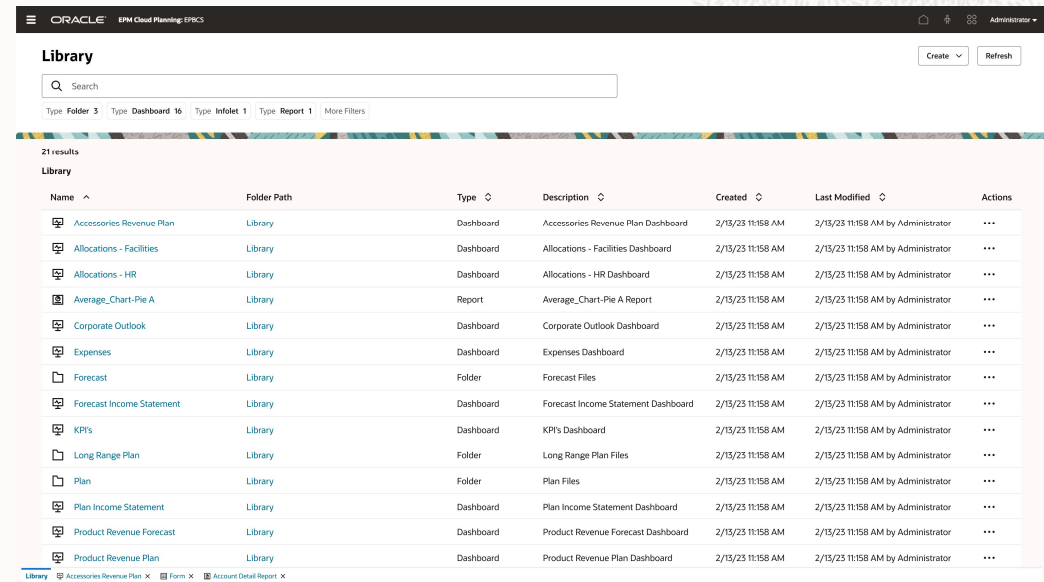
- Dashboards
- Forms
- Adhoc
- Reports

Unified

- Search and filter
- Sorting
- Assign Access
- Create/Edit/Move
- Dynamic Tabs across dashboards, forms, reports, Adhoc

Reduced number of clicks

Ability to open multiple tabs across reports, forms, dashboards, adhoc



Name	Folder Path	Type	Description	Created	Last Modified	Actions
Accessories Revenue Plan	Library	Dashboard	Accessories Revenue Plan Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Allocations - Facilities	Library	Dashboard	Allocations - Facilities Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Allocations - HR	Library	Dashboard	Allocations - HR Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Average_Chart-Pie A	Library	Report	Average_Chart-Pie A Report	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Corporate Outlook	Library	Dashboard	Corporate Outlook Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Expenses	Library	Dashboard	Expenses Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Forecast	Library	Folder	Forecast Files	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Forecast Income Statement	Library	Dashboard	Forecast Income Statement Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
KPI's	Library	Dashboard	KPI's Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Long Range Plan	Library	Folder	Long Range Plan Files	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Plan	Library	Folder	Plan Files	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Plan Income Statement	Library	Dashboard	Plan Income Statement Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Product Revenue Forecast	Library	Dashboard	Product Revenue Forecast Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...
Product Revenue Plan	Library	Dashboard	Product Revenue Plan Dashboard	2/13/23 11:15:58 AM	2/13/23 11:15:58 AM by Administrator	...



Connected EPM Cloud Library

With Search & Filter

Only in Redwood Theme

ORACLE

EPM Cloud Planning: EPBCS

Connections

Connections Tab – Non-Admins

Search

Application Name

Account Reconciliation

Connection Name

Account Reconciliation

13 results

Application Name	Connection Name	Application Type
Account Reconciliation	Account Reconciliation	Account Reconciliation
EDM	EDM	Other Web Service Provider
FCC		
FsnEPCM		
HCMSWP		
Narrative Repor		
Or3ITCC		
Planning		
Planning Rule		
SalesPln		
Tax		
TRCS		
VisCnsl		

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EPM Cloud Planning: EPBCS

Connections

Connections Tab - Admin

Search

Application Name

Account Reconciliation

Connection Name

Account Reconciliation

13 results

Application Name	Connection Name	Application Type	Domain	Created	Modified	Actions
Account Reconciliation	Account Reconciliation	Account Reconciliation		2/13/23 07:00 PM	2/13/23 07:18 PM by Administrator	...
EDM	EDM	Other Web Service Provider		2/13/23 06:00 PM	2/13/23 06:18 PM by Administrator	...
FCC	FCC	Other Web Service Provider		2/13/23 05:00 PM	2/13/23 05:18 PM by Administrator	...
FsnEPCM		Enterprise Profitability and Cost Mana		2/13/23 04:00 PM	2/13/23 04:18 PM by Administrator	...
HCMSWP	SWP	Strategic Workforce Planning Cloud		2/13/23 03:00 PM	2/13/23 03:18 PM by Administrator	...
Narrative Reporting	Narrative Reporting	Narrative Reporting		2/13/23 02:00 PM	2/13/23 02:18 PM by Administrator	...
Or3ITCC	IT Costing	Enterprise Profitability and Cost Mana		2/13/23 01:00 PM	2/13/23 01:18 PM by Administrator	...
Planning	Planning	Other Web Service Provider		2/12/23 07:00 PM	2/12/23 07:18 PM by Administrator	...
Planning Rule	Planning Rule	Other Web Service Provider		2/12/23 06:00 PM	2/12/23 06:18 PM by Administrator	...
SalesPln	Sales Planning	Sales Planning Cloud		2/12/23 05:00 PM	2/12/23 05:18 PM by Administrator	...
Tax	Tax	Other Web Service Provider		2/12/23 04:00 PM	2/12/23 04:18 PM by Administrator	...
TRCS	Tax Reporting	Tax Reporting		2/12/23 03:00 PM	2/12/23 03:18 PM by Administrator	...
VisCnsl	Financial Close	Financial Consolidation and Close		2/12/23 02:00 PM	2/12/23 02:18 PM by Administrator	...

Connections

Library - EPBCS

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EPM Cloud Planning: EPBCS

Library - EPBCS

Actions

Refresh

Search

Type

Dashboard

Created

2/13/23 07:00 PM

Last Modified

2/13/23 07:18 PM

21 results

Library

Name	Folder Path	Type	Description	Created	Last Modified	Actions
Accessories Revenue Plan	Library	Dashboard	Accessories Revenue Plan Dashboard	2/13/23 07:00 PM	2/13/23 07:18 PM by Administrator	...
Allocations - Facilities	Library	Dashboard	Allocations - Facilities Dashboard	2/13/23 06:00 PM	2/13/23 06:18 PM by Administrator	...
Allocations - HR	Library	Dashboard	Allocations - HR Dashboard	2/13/23 05:00 PM	2/13/23 05:18 PM by Administrator	...
Average_Chart-Pie A	Library	Report	Average_Chart-Pie A Report	2/13/23 04:00 PM	2/13/23 04:18 PM by Administrator	...
Corporate Outlook	Library	Dashboard	Corporate Outlook Dashboard	2/13/23 03:00 PM	2/13/23 03:18 PM by Administrator	...
Expenses	Library	Dashboard	Expenses Dashboard	2/13/23 02:00 PM	2/13/23 02:18 PM by Administrator	...
Forecast	Library	Folder	Forecast Files	2/13/23 01:00 PM	2/13/23 01:18 PM by Administrator	...
Forecast Income Statement	Library	Dashboard	Forecast Income Statement Dashboard	2/12/23 07:00 PM	2/12/23 07:18 PM by Administrator	...
KPI's	Library	Dashboard	KPI's Dashboard	2/12/23 06:00 PM	2/12/23 06:18 PM by Administrator	...
Long Range Plan	Library	Folder	Long Range Plan Files	2/12/23 05:00 PM	2/12/23 05:18 PM by Administrator	...
Plan	Library	Folder	Plan Files	2/12/23 04:00 PM	2/12/23 04:18 PM by Administrator	...
Plan Income Statement	Library	Dashboard	Plan Income Statement Dashboard	2/12/23 03:00 PM	2/12/23 03:18 PM by Administrator	...
Product Revenue Forecast	Library	Dashboard	Product Revenue Forecast Dashboard	2/12/23 02:00 PM	2/12/23 02:18 PM by Administrator	...
Product Revenue Plan	Library	Dashboard	Product Revenue Plan Dashboard	2/12/23 01:00 PM	2/12/23 01:18 PM by Administrator	...

Library as Dynamic Tab



CY2024

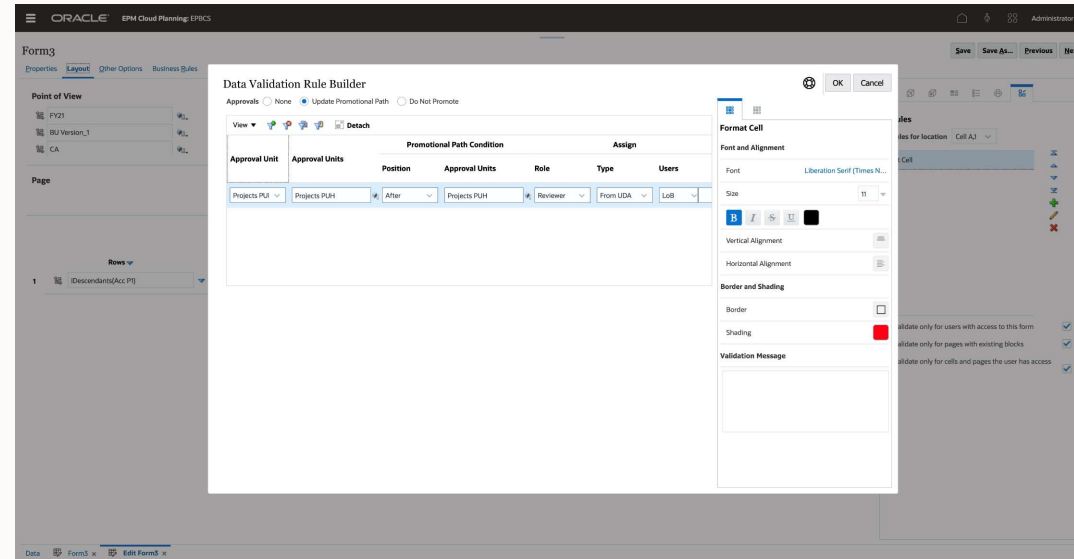
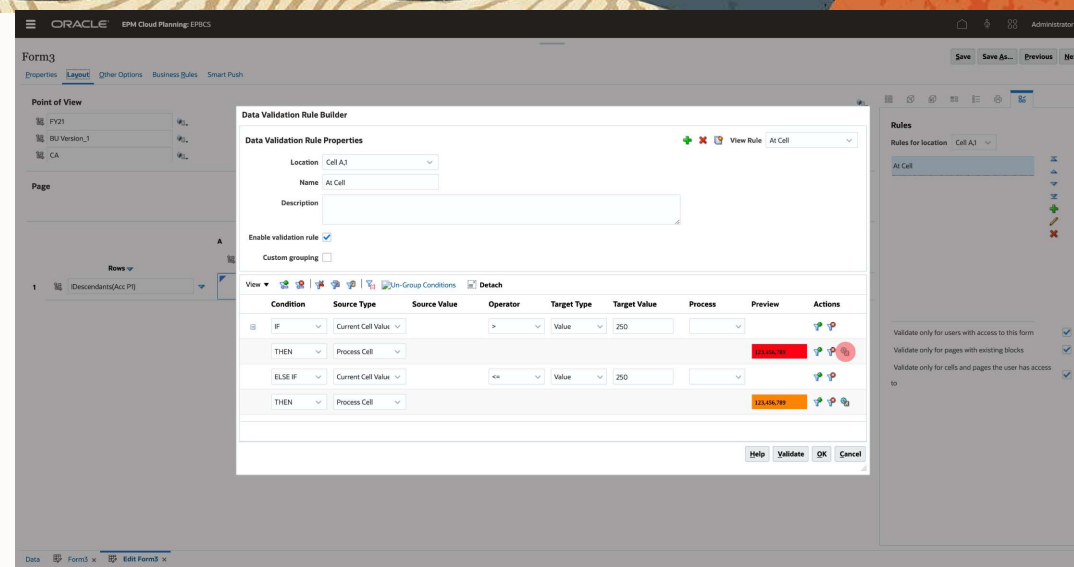
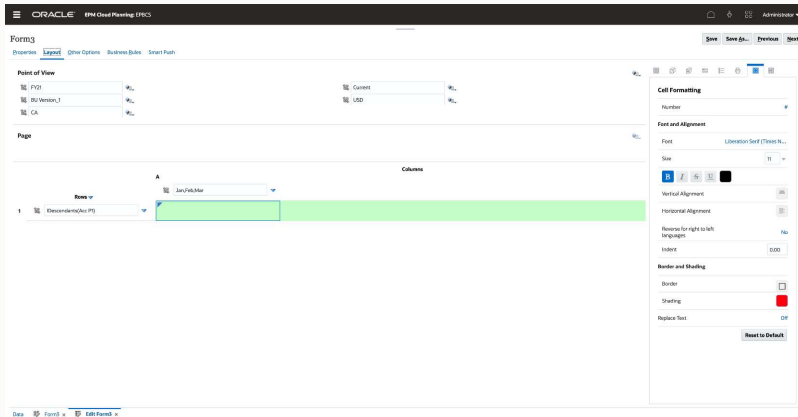


Groovy /REST API

- Prevent Same Time Processing of a Data Load Rule through REST API
- Groovy access to the user account's email to convey information
- Allow messages to be displayed to users via Groovy when calculations run
- Ability to write MDX scripts for ASO cube
- Job Console Filter of Job run time
- MdxMergeSlices - selectively merge slices after updates
 - *MdxCopy can be achieved through datamaps.*
 - *MdxFormula - can be done using custom calc rules*
 - *MdxClear now available through groovy*

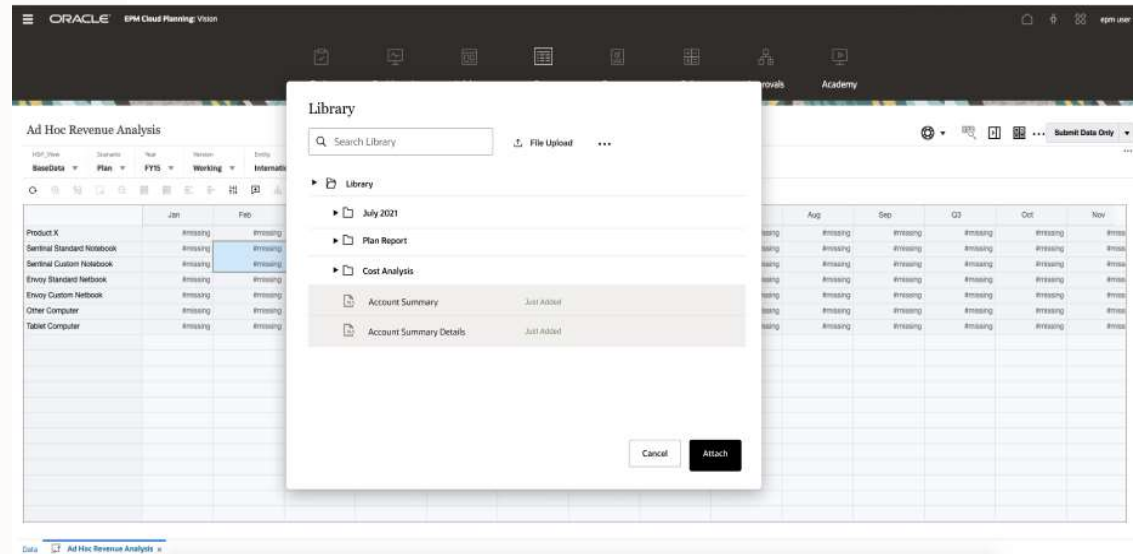
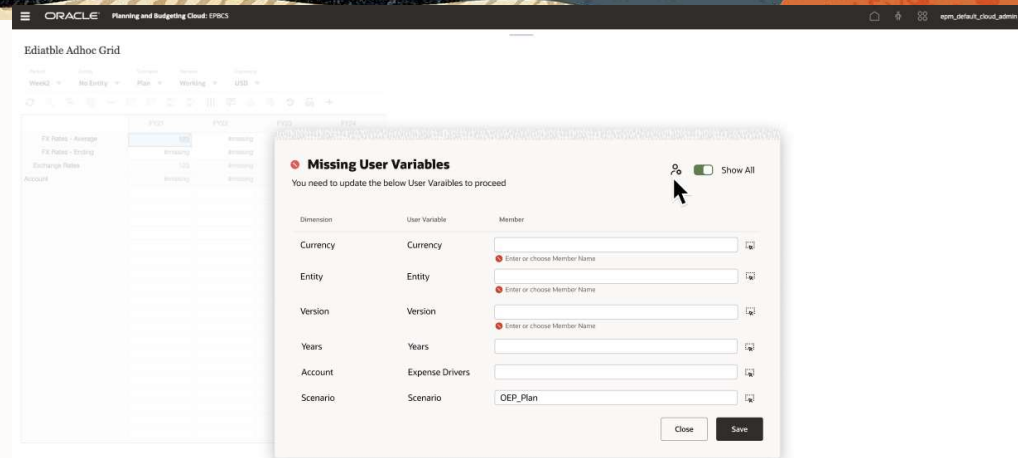
Formatting on Forms

- Dynamic query-oriented formats
 - Uses Data Validation Rules Framework
 - Supports If, Then Else conditional formats
 - For both Metadata and Data
- Segment level format support expand collapse
- Level and Generation based formats
- Form Design changes
 - Support formatting like Reports



User Variable and Doc Attachment

- Ability to attach documents uploaded into the library
- Ability to set user variables from a form interface



SmartView & Web Forms and Web Adhoc

• SmartView – 2024

- Dashboards in SmartView
- Page Drop down optimization
- Member Selector Optimization
- Navigation Flow
- Library to show connected applications
- Integration with EPM Task Manager
- Cell attachment with url
- Usability
 - Rename Menu To EPM Cloud
 - Hide/ Mask Logs
 - Recently searched items list in search
 - Icon changes

Dashboards, Web Forms & Adhoc - 2024

- Analyze slices and charts from dashboard to Adhoc
- Ancestor on top in Forms
- Show all members of the dimension tree
- Web-Adhoc to Reports conversion
- FlexForms on Web
- Web Adhoc Smart View Adhoc parity
- Forms & Web Adhoc usability improvements
- Dashboard 2.0 universal settings
- Top 10 - Bottom 10 in Dashboards



Essbase 21c Level Set

- EPM Adoption is Fleetwide across Business Processes
- Classic Mode – CY2024
 - Data is stored on disk
 - Calculations are done in Essbase mid-tier
 - No UI exposure to Essbase 21c features.
- Federated Mode – ~ CY2025
 - Data stored in relational tables
 - Calculations are pushed to relational
 - Dependent on Essbase 21.5 + readiness

Cloud EPM Platform 23.07

[Recent Features in EPM Cloud](#)

Recent Highlights (23.06)

- On-the Fly Calc On Grid
- Slice based groovy export
- ASO Source For Data Maps
- Phased Approvals
- EPM Task Manager For Planning
- Cross App Smart Push
- OAuth 2.0 support
- Clone Environment
- IDCS group support
- DKIM support for emails sent from EPM Cloud
- IP allow-list support for OCI
- Ability to set idle session timeout
- Virus scanning for uploaded files
- Smart View
 - Flex Forms Invalid member indicator
 - Adhoc Multi-Member Zoom
 - Flex Forms in Columns
 - Cross Alias Table referencing
 - Adhoc Member Alias Display

R&D Underway

- Forms With New Grids
- Dashboards With New Form Grids
- On-the Fly Calc On Forms
- Cross App Data Maps
- Attribute Support For Data Maps
- Auto-predict Events
- Search & Filter Listing Pages & Common Library
- Roles: Reports, Dashboards, Announcements, Doc Upload
- Smart View – Adhoc Essbase Parity
 - Formula Drill Down for Adhoc
 - Sheet Info consistency
- Self-service Performance Validation Test
- Formatting Support on Grids
- Flex Forms On Web
- Essbase 21c for EPM Platform
- OAuth 2.0 support for user management
- TLS 1.3 support

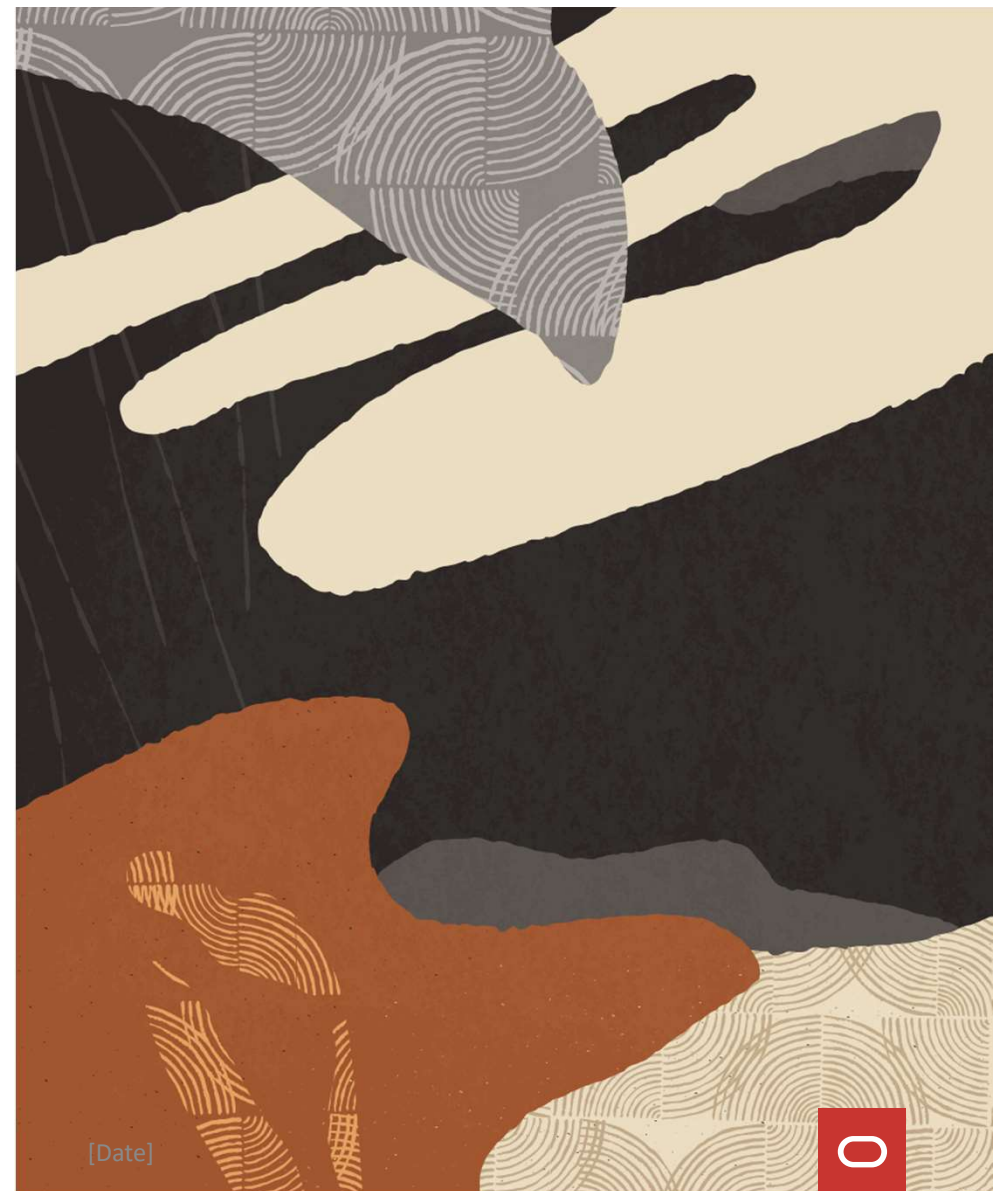
Looking Forward

- Common Connections
- Relational Blending
- Flexible Approvals Drop Down dimensions
- Business Rules Interface Simplification
- New OCI regions, including US-Gov and UK-Gov
- Shorter Maintenance Window
- Essbase 21c with ADW support for EPM Platform
- Disaster Recovery & High Availability with short RPO
- OCI Console support
- Custom EPM Roles

Thank you

Shankar Viswanathan

EPM Cloud Product Management



Must-see EPM Sessions Remaining: Customer Presenters

Session Title	Customer Presenter	Day & Time
Secret Ingredients for Success with Financial Master Data and Data Governance – Kroger's Enterprise Data Management (EDM) Journey	The Kroger Co	Tuesday, 8:30
Financial Institution Crushing Margin Planning with Oracle EPM	Farmers & Merchants Bank	Tuesday, 13:45
Case Study: Better Performance with DSO in Cloud Consolidations at Boardwalk Pipeline	Boardwalk Pipelines	Tuesday, 13:45
"Lean, Mean, Equitization Machine" – Taking the Fat out of a Process like a George Foreman Grill	Principal Financial Group	Tuesday, 16:30
Better Together: How SM Energy's Utilizes Oracle's Strategic Modeling and EPM Cloud Planning to Integrate Their Strategic Plan with the Budget and Forecast Process	SM Energy	Wednesday, 9:00
Planning and Executing M&A Systems Integration with Oracle Cloud	Diversey, Inc.	Wednesday, 11:45
A Whale of a Tale! How Pacific Life Breached the Cloud with DRM to EDM Migration	Pacific Life	Wednesday, 14:00
HFM to FCC: TimkenSteel's Journey Towards Efficiency and Improvement	TimkenSteel	Wednesday, 14:00



Must-see EPM Sessions: Oracle Presenters

Session Title	Presenters	Day & Time
Just the SparkNotes: A Procrastinator's Guide to This Year's Key Enhancements to Account Reconciliation	Nick Boronski	Tuesday, 8:30
What's New and What's Coming in Oracle Enterprise Data Management Cloud	Rahul Kamath	Tuesday, 9:45
Oracle EPM Product Management Panel	EPM Product Management	Tuesday, 13:45
IPM – Best Practices and What's New	Muthu Ranganathan	Tuesday, 15:15
Automating Tax Accounting in Oracle Cloud EPM: Transfer Pricing, Tax Provision, Tax Forecasting, and More	Marc Seewald	Tuesday, 16:30
EPM Data Integration – What's New, What's Coming with Full-Year Roadmap	Mike Casey	Wednesday, 9:00
What's New in Planning Cloud	Mark Rinaldi	Wednesday, 10:15
Benefits of a Connected Close	Rich Wilkie	Wednesday, 10:15
What's New in Cloud EPM Narrative Reporting	Al Marciante	Wednesday, 11:45
EPCM Modeling Tips, Tricks, and Best Practices	Don Bean	Wednesday, 11:45
Using FreeForm for EPM Reporting	Shankar Viswanathan	Wednesday, 14:00
Bringing Science to the Art of Finance: Oracle IPM Update, Roadmap, and Practical Considerations	Marc Seewald	Wednesday, 15:15
Introducing Oracle Predictive Cash Forecasting: New in Cloud EPM	Marc Seewald	Wednesday, 16:30
Oracle's Planning Exam Cram (for Certification)	Mark Rinaldi	Thursday, 9:00



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