

# Housekeeping



The webinar will start shortly.



Live Q&A and Chat are enabled for the session.



Help us improve this content for you!  
Survey option will be offered at the end of the session.



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# Enhanced EPM Visualizations and Analysis

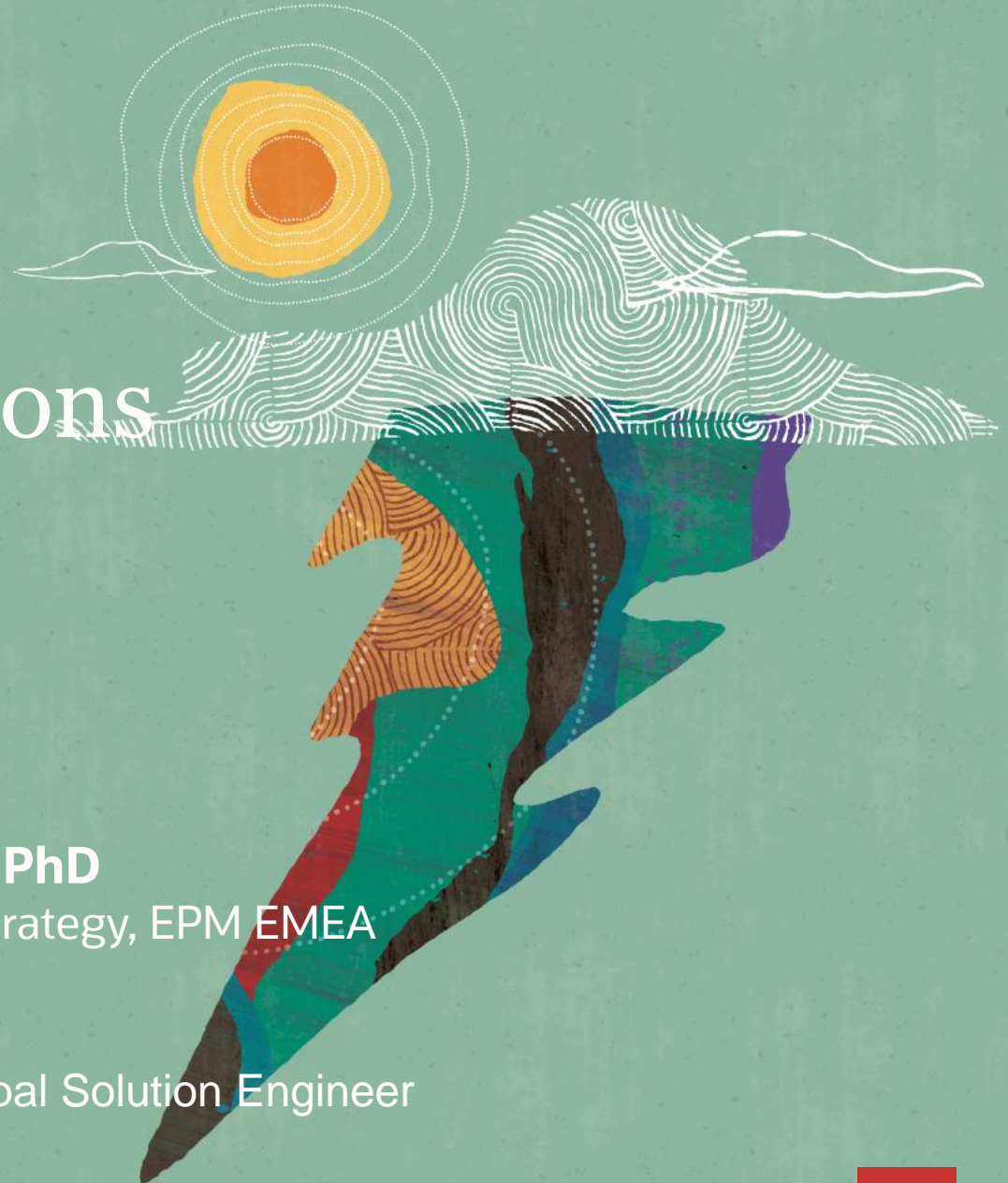
Oracle Customer Success

**Zaid Alnaser**  
**Vlad Constantinescu**  
Customer Success Manager

30<sup>th</sup> of May 2023

**Andreea Vasiliu PhD**  
Director Product Strategy, EPM EMEA

**Paul Armitage**  
EPM Master Principal Solution Engineer





## Vlad Constantinescu

Customer Success Manager

[vlad.c.constantinescu@oracle.com](mailto:vlad.c.constantinescu@oracle.com)

[LinkedIn](#)



## Zaid Alnaser

Customer Success Manager

[zaid.alnaser@oracle.com](mailto:zaid.alnaser@oracle.com)

[LinkedIn](#)



## Paul Armitage

EPM Master Principal Solution Engineer

[paul.r.armitage@oracle.com](mailto:paul.r.armitage@oracle.com)

[LinkedIn](#)





## Andreea Vasiliu, PhD

Director Product Strategy, EPM, EMEA

[andreea.vasiliu@oracle.com](mailto:andreea.vasiliu@oracle.com)

[LinkedIn](#)

# Agenda

1 Quick: Cloud EPM Roadmap Updates

2 Sneak Peak: Forms 2.0 & Dashboard 2.0

3 Sneak Peak: Demo

4 New capabilities you would like to see

5 Q&A



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# Oracle Cloud Infrastructure Gen2 (OCI Gen 2)

## Migration program

Feature	Description
Oracle Cloud Identity Console	A console that lets you perform user and security management tasks such as creating users, removing users, assigning and unassigning roles, and setting up SSO.
New audit reports	Role Assignment Audit Report and Invalid Audit Report are available through EPM Automate and REST APIs. Application Role Privileges Report, Successful Login Attempts Report, Unsuccessful Login Attempts Report, and Dormant Users Report are available from Oracle Cloud Identity Console and through Oracle Cloud Identity Service REST APIs.
OAuth 2 Support for REST API	Use OAuth 2 access tokens to make REST API calls to EPM Cloud to avoid the use of passwords in REST calls.
Private access to EPM Cloud	If the customer has an OCI IaaS subscription in the same data centre as the EPM Cloud environments, you can use the Service Gateway Service to avoid having traffic go over internet. See <a href="#">Use of Dedicated VPN Connection to Restrict Access</a> in <i>Oracle Enterprise Performance Management Cloud Operations Guide</i> .

[Review differences between Classic and OCI EPM Cloud Environments](#)

# OECD Pillar II in Oracle Tax Reporting

- **Top-up Tax Model:**
  - GloBE Income Calculation
  - Covered Tax Expense Calculation
    - Extension of existing IFRS provision capability
    - Loss and credit carry forward detail
  - ETR Reconciliation
    - ETR based on GloBE income
  - Top-up Tax Calculation
    - Entity and country level detail
- **Forms, Dashboards, & Reports**
- **Other Considerations:**
  - Pillar II goes into effect in 2024. However, modelling should begin in 2023 to determine tax impacts
  - Pillar II calculations will be stored in a new member in the “Scenario” dimension; treating it as a tax regime
  - Phase I(a) – Top-Up Tax
  - Targeting **Customer Preview** in June 2023; GA to follow in CYQ2/Q3 2023
  - Phase I(b) – Safe Harbour rules
  - Phase I(c) – Country level modifications and IIR & UTPR, etc.

[Tax Reporting Customer Connect](#)

# Interested in building your own EPM Center of Excellence?

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Review the videos  
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If you have further questions or want to discuss this topic, please contact [EPMCOE\\_WW@oracle.com](mailto:EPMCOE_WW@oracle.com)

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# EPM Cloud Platform

## • User Interaction

- User Interface
- Set Up and Admin
- Design & Usage Components
- Preferences, and Settings
- Smart View
- Reporting

## • 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

Hyperion Planning On-Prem > PBCS (2014) > EPM Cloud Platform (2016) > EPM Cloud Planning - Custom (2019)

- Common technical or functional components used by any, some or all EPM Cloud business processes
- Providing service to other business processes and directly revenue generating.
  - *73% of EPM Cloud Enterprise SKU Planning Apps are deployed using only the Platform*



# Redwood Theme Notification

## Effective Early 2024

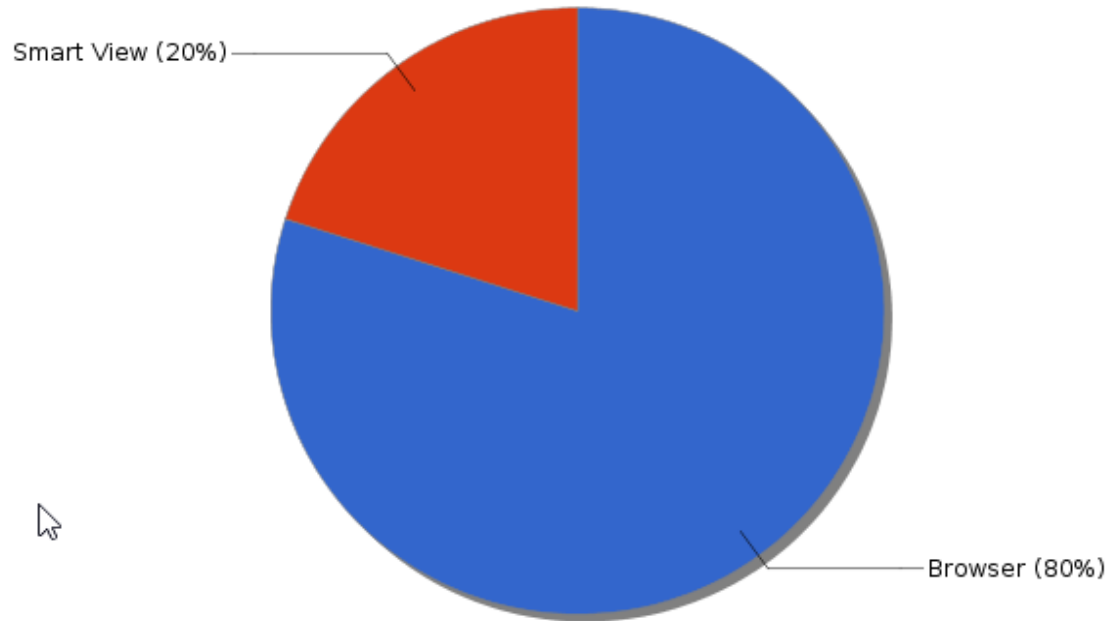
- **Oracle EPM Cloud will support only Redwood Experience theme**
- For existing customers on Redwood theme
  - Non-Redwood themes will not appear as an option to choose from Appearance card.
- For existing customers on non-Redwood theme
  - You can switch to Redwood theme but will not have the option to switch back to other themes
- All EPM Cloud business processes are impacted:
  - Planning, Close, Tax, Profitability, FreeForm, Account Reconciliation, Narrative Reporting, EDM
  
- **Customers are advised to plan towards shifting their user base to the Redwood Experience theme**
- **For new environments Redwood will be the available theme**
- **Oracle aims to address any concerns reported around using Redwood theme before the de-support**

# 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 Reconciliation, Narrative Reporting
    - Strategic Modeling (Planning) - In Roadmap



# Why Are Web-Forms & Dashboards Important?

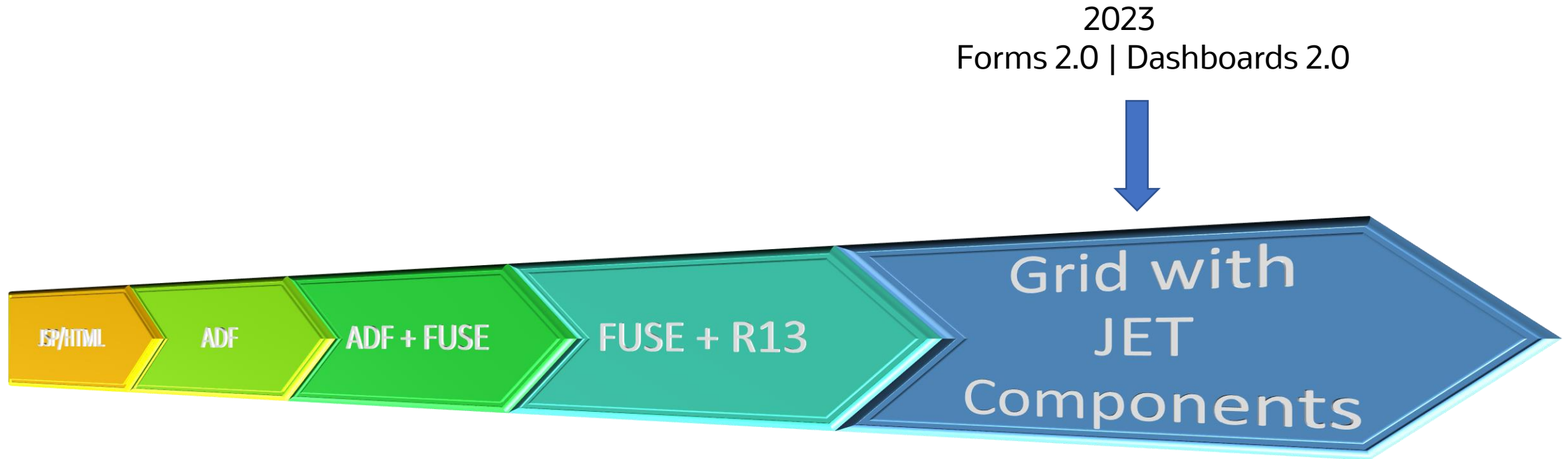


- 80% of users spend time on Web
- Web Users spend 80+ % of their time on Forms & Dashboards



# EPM Cloud Platform Grid Milestones

Technology Innovation Journey



# Forms and Dashboards in EPM Cloud Platform

## What We Have Today

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

## What We Will Have In Q4 CY2023

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



# Forms 2.0

## Only in Redwood Theme

- New form grid rearchitected and built with Oracle JET components
- Calc on the Fly on the grid
- Lots of Ease of Use and Usability improvements
- All new Applications created will default to Forms 2.0 in Application Settings
- All future form enhancements will be only within Forms 2.0

The screenshot shows the Oracle EPM Cloud Planning Vision application settings. The 'Forms Mode' dropdown menu is open, showing 'Forms' and 'Forms 2.0' options. A red arrow points to the 'Forms 2.0' option. Other settings visible include 'Web Ad Hoc Grid', 'Suppression Mode', 'Smart View Ad Hoc Behavior', 'Link Accounts by Default', 'Attribute Dimension Re-order Threshold', 'Set Reporting Options', 'Report Settings', 'Predictive Planning', 'Prediction Interval', 'Prediction Cube', 'Source Cube', and 'POV'.

The screenshot shows the Oracle EPM Cloud Planning Vision application displaying a 'Revenue Plan' grid. The grid displays data for various categories (Phones, Laptop, Computer, Headphone, Controllers, Games, Desk, Music, Diana Marakus, Chris Holden, Allan Schoenberger, Kelly Manning) across months (Jan to Oct). An 'Adhoc User Options' panel is visible on the right side, showing settings for 'Grid', 'Member Inclusion', 'Include Selection', 'Within Selected Group', 'Zoom In', 'Ancestor Position', 'Indentation', and 'Navigate Without Data'.

	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

# Forms 2.0 – Usability Improvement Highlights

- Fast Cell to Cell navigation
- Reduce clicks and remove popups
- Clean new icons and dialogs
- POV drop down and selection and Search
- Tree based member selector and search
- Quick scrolling across data grids
- Action Menus on right click
- Search in POV & Smart Lists
- Built in line-item detail
- Wizard based RTP drawers

The screenshot displays the Oracle EPM Cloud Planning: Vision interface. The top navigation bar includes 'Tasks', 'Dashboards', 'Infolets', 'Data', 'Reports', 'Rules', 'Approvals', and 'Academy'. The main content area is titled 'Long Range Plan Drivers' and features a table with columns for 'Entity', 'Version', 'Scenario', and fiscal years 'FY22', 'FY23', and 'FY24'. The table data is as follows:

Entity	Version	Scenario	FY22	FY23	FY24
No Department	Baseline	Plan			
Shares Outstanding			10,000	37,815,111	32,238,428
EPS			1.27	1.31	1.60
Total Capital in MM			1,652,192,846	1,686,782,596	1,838,363,268
ROIC			13.53%	19.02%	16.97%
Interest Coverage			4.39	4.95	6.13
Debt/Capital %			80.42%	61.04%	39.29%
Excess Debt			20	0	0
Credit Rating Value			8	7	6
Credit Rating			A-	A	A+
Value per Share			31.82	38.02	37.77
Current Stock Price			39.25	39.25	39.25

Red annotations highlight usability improvements: a red box around the top navigation bar, a red arrow pointing to the 'Long Range Plan Drivers' title, a red box around the table's filter bar (Entity, Version, Scenario), and a red box around the table's toolbar (search, refresh, print, etc.).



## On the Fly Calc on Grid in Forms 2.0

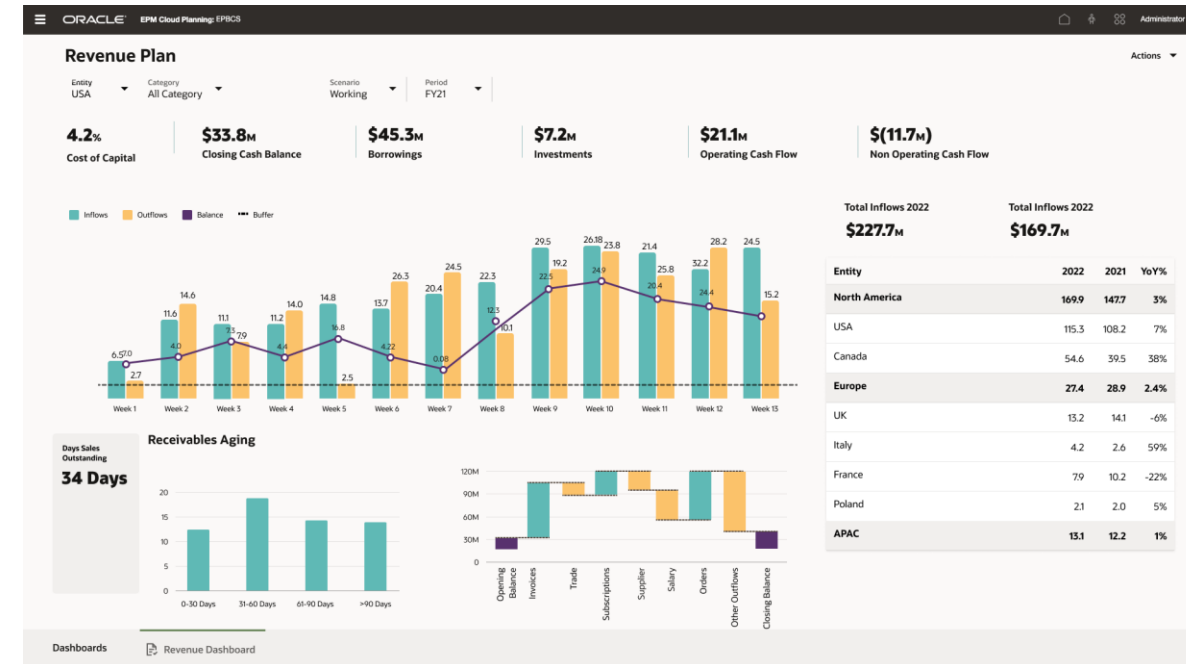
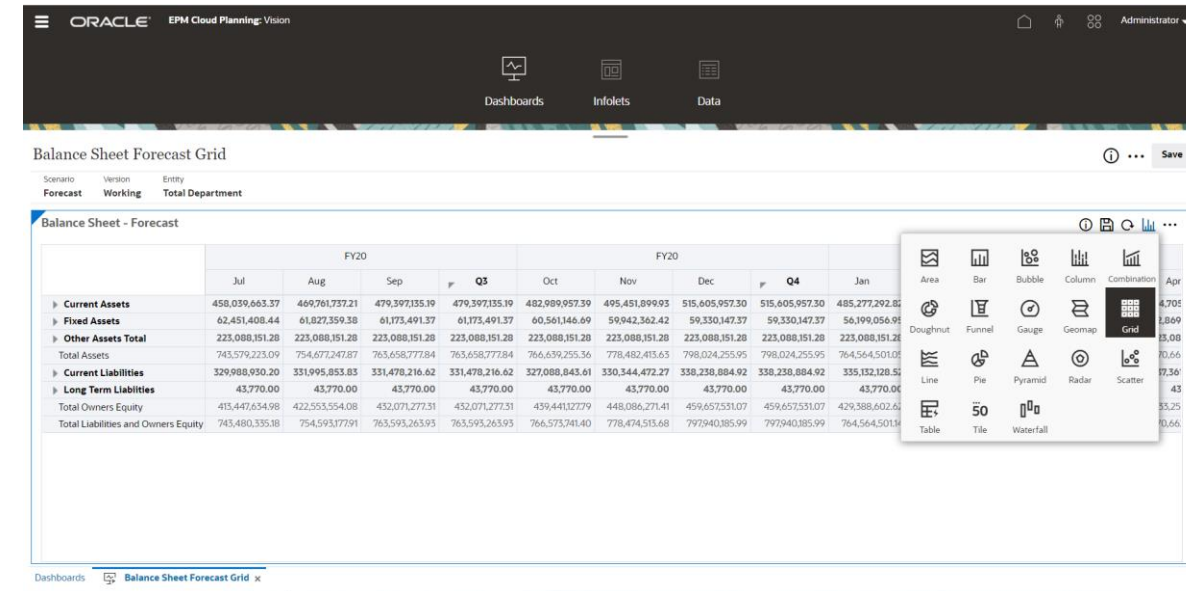
- Instant Member formula and outline math calc on grid
  - Emulates a save to Essbase
  - Calcs on the fly in the grid bypassing Essbase.
  - No wait time to Calc and reload grid.
- Using outline math and member formulas, grid-based formulas are created and evaluated in the browser when a value on the user's current grid is changed.
- This allows cells' values to be recalculated based on a formula without saving to Server/Essbase
- Available in Ad-hoc today; soon in Forms 2.0



# Dashboard 2.0 with Grids

## Only in Redwood Theme

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



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# Demo



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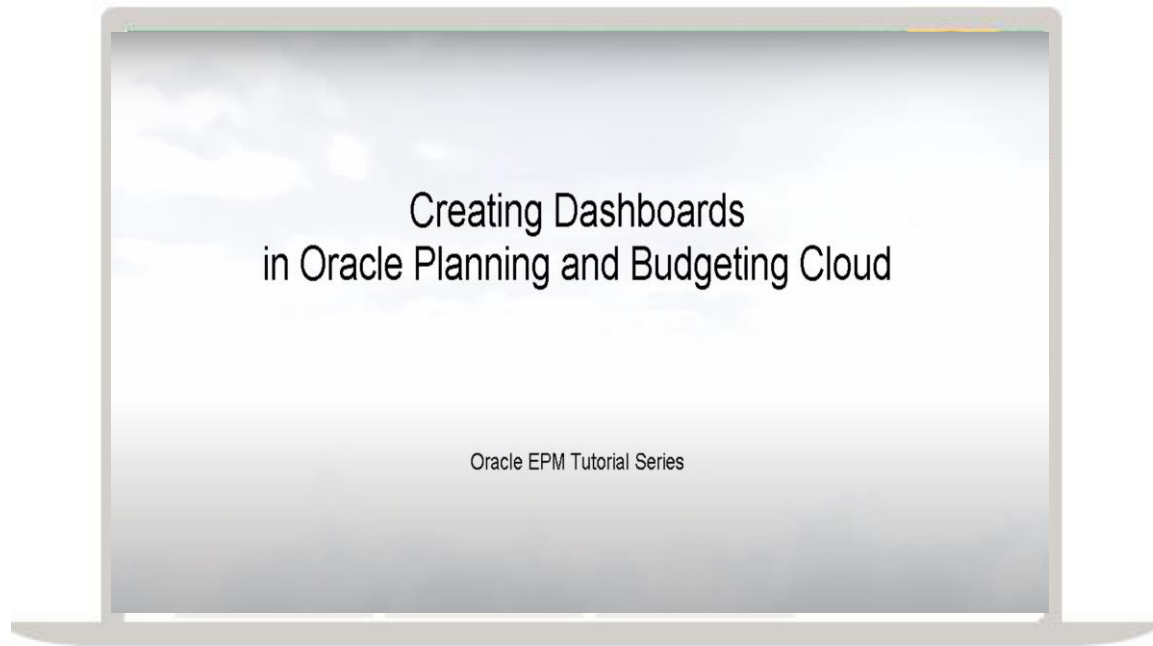
4 **New capabilities you would like to see**

5 Q&A



# What new capabilities would you like to see?

## NEXT STEPS



[Creating Dashboards in Oracle Planning and Budgeting Cloud - YouTube](#)



[Designing Dashboards 2.0 in EPM Cloud Planning - YouTube](#)

# EPM Platform Roadmap

## Redwood Theme Only

### • 2<sup>nd</sup> 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
- Better Screen Real Estate
- Consistent Listing Pages with Search, Filter & Sort
- New Jobs Listing Page
- Formatting on Forms 2.0

### • 1<sup>st</sup> Half CY 2024

- Uniform Dark/Light Style Support
  - One place to impact color & styles across the application
- Consistent Library across applications
  - Cross App Connected EPM Library
- Dynamic Tab and new form grid support for Strategic Modeling
- Dynamic Tab Support across other Platform components

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# Q&A



# For more insights...



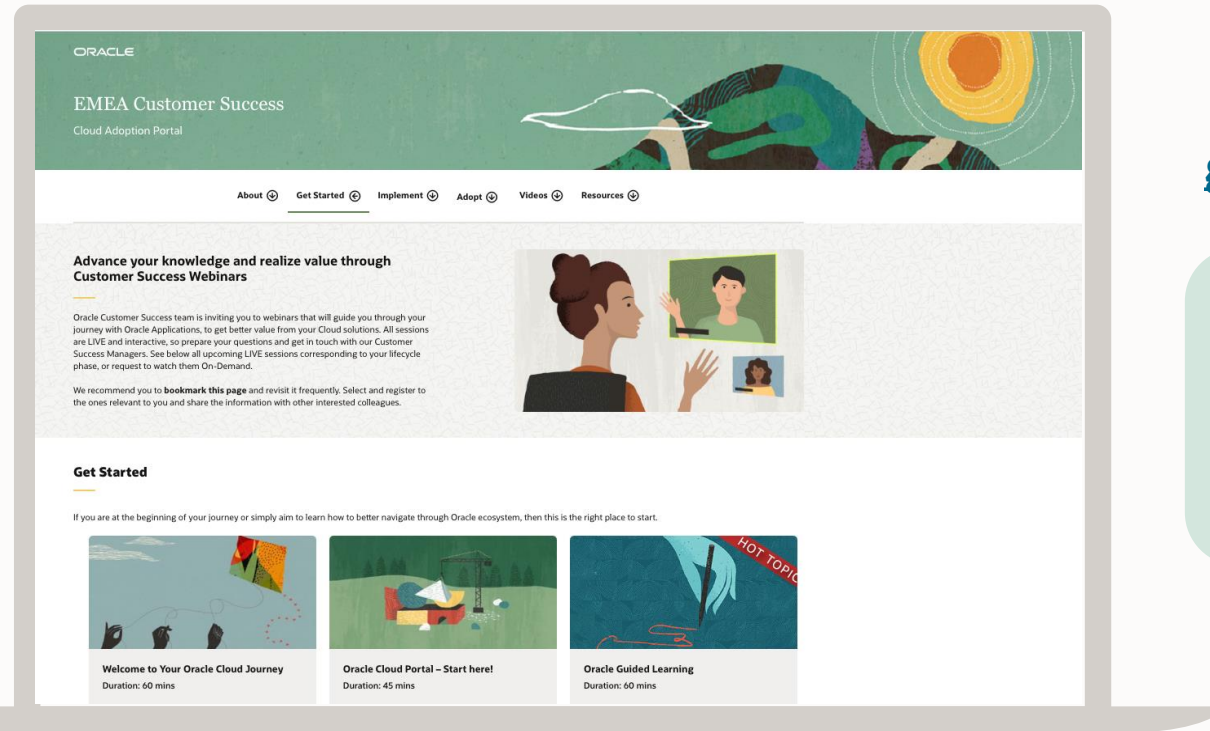
We can schedule a dedicated, one to one session with you.



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# Enhanced EPM Visualizations and Analysis

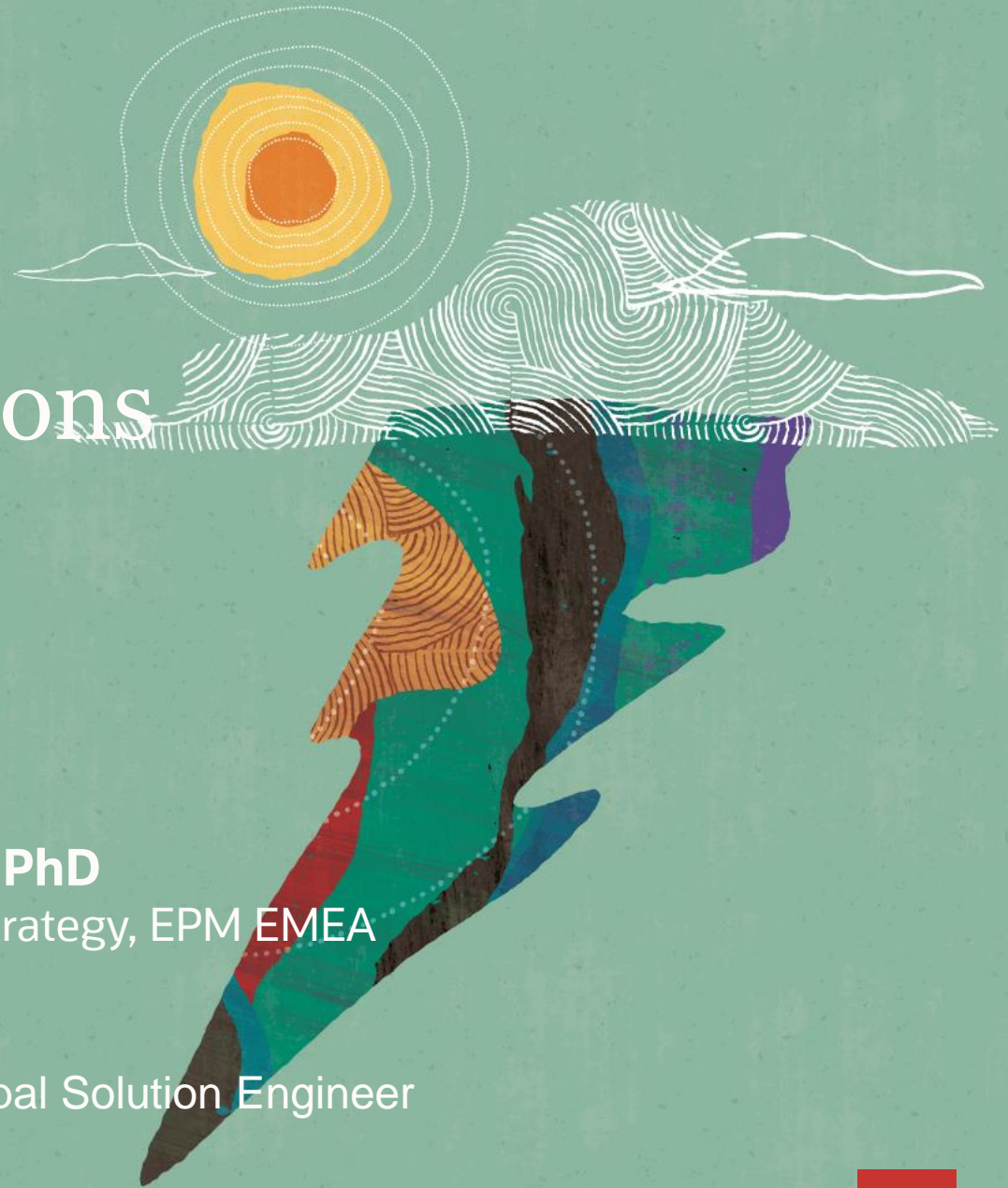
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