



Oracle Planning and Budgeting Cloud

What's New in the February Update (17.02)

February 2017

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REVISION HISTORY

This document will continue to evolve as existing sections change and new information is added. All updates are logged below, with the most recent updates at the top.

Date	What's Changed	Notes
26 JAN 2017		Initial Document Creation

ORACLE PLANNING AND BUDGETING CLOUD, FEBRUARY UPDATE

This document outlines the announcements and fixed issues in the upcoming Oracle Planning and Budgeting Cloud and Enterprise Planning and Budgeting Cloud update.

ANNOUNCEMENTS AND NEW FEATURES

MONTHLY UPDATE SCHEDULE

We would like to inform you of the upcoming monthly update for your Oracle Cloud environments. We will apply the latest updates to your test environment on Friday, February 3, 2017 and to your production environment on Friday, February 17, 2017. The update will be applied during your normal daily maintenance window.

AUTOMATING THE DOWNLOADING OF ACTIVITY REPORTS

You can now automate the downloading of the Activity Report, which is automatically generated for each day. This report enables Service Administrators to understand application usage and helps streamline application design by identifying calculation scripts and user requests that impact application performance.

Oracle has created and documented a script that you can use to automate the downloading of Activity Reports. See the following information sources:

- Scenario 11: Automating Activity Report Downloads to a Local Computer in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud* for the script that is to be used in the download batch file.
- Automating Script Execution in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud* for steps involved in scheduling the script to automate the download process.
- Viewing Activity Reports and Downloading Access Logs in the *Using Oracle Planning and Budgeting Cloud* for detailed information about the Activity Report.

SINGLE SIGN-ON WITH ORACLE FUSION APPLICATIONS

Starting with this update, you can configure single sign-on access between Oracle Enterprise Performance Management Cloud and Oracle Fusion Cloud. Configuring SSO requires you to configure SAML 2.0 Identity Provider (IdP) between Oracle EPM Cloud and Oracle Fusion Cloud.

See [Managing Single Sign-On](#) in *Administering Oracle Cloud Identity Management* for information on configuring the SSO process to work with Oracle Fusion Cloud.

DEFINE VALID INTERSECTIONS-BASED ON ATTRIBUTE

You can define valid intersections based on an attribute. Attribute dimensions can now be selected in valid intersection definitions.

SHOWING APPROVAL UNITS AS ALIASES IN APPROVALS NOTIFICATIONS

You can now display approval units using their aliases instead of member names when approval notifications are sent. To support this enhancement, a new option was added to the Application Settings page called Show Approval Units as Aliases in Approvals Notification.

The default setting for this option is No, which means the system will continue to use member names. To view this application default setting, click or tap the Navigator icon, then under Setup, click or tap System Settings and Defaults, and then select Current Application Defaults. To view this user preference setting, click or tap the **Navigator** icon, and then under **Create and Manage**, click or tap **Preferences**.

UPDATED OPTIONS FOR BUSINESS RULES PROPERTIES

The options for **Business Rules Properties** on the **Form and Ad Hoc Grid Management** page have been updated for clarity:

- Run on Load is now labeled Run Before Load
- Run on Save is now labeled Run After Save

HUMAN CAPITAL MANAGEMENT INTEGRATION WITH ENTERPRISE PLANNING AND BUDGETING CLOUD WORKFORCE PLANNING

Using Data Management, you can load your Human Resources metadata and data from Human Capital Management to use in the Workforce Planning business process of Enterprise Planning and Budgeting Cloud. You can load such information as:

- Employees
- Jobs / Positions
- Employee demographics such as skills, education level, and age bands
- Other EPBCS dimensions such as Entities
- Depending on the enabled dimensions, data by department, cost center, and currency
- Data such as salary basis, salary rate, start month, FTE, employee date of birth, and so on

Please note that you must perform manual steps in this update to implement this integration. You load the metadata, for example, employee data, using the native data load feature in Enterprise Planning and Budgeting Cloud. You can use Data Management to load data to Enterprise Planning and Budgeting Cloud. Oracle is in the process of creating a detailed whitepaper that explains how you can use current

functionalities in the Human Capital Management Cloud application and in Oracle Data Management load Human Resources metadata and data for use in the Workforce Planning business process of Enterprise Planning and Budgeting Cloud.

NEW EPM AUTOMATE UTILITY VERSION THAT IMPORTS IDM ARTIFACTS

A new version of the EPM Automate Utility is available with this update. This version enhances the `importsnapshot` command to allow the import of identity domain artifacts from application snapshots. This enhancement simplifies the cloning of a service instance by avoiding the step of manually importing users and roles into the identity domain.

The activities that you can complete using `importsnapshot` command depend on your role.

- Service Administrators can import only application artifacts into a service instance.
- Identity Domain Administrators can import only identity domain artifacts. If a user who is not in the identity domain is referenced in the snapshot being imported, the utility creates a user in the identity domain and assigns the default password that you specify in the command.
- Service Administrators who are also assigned the Identity Domain Administrator role can import application content into the service instance and identity domain artifacts (users and their role assignments) into the identity domain of the service instance.

You must install this version of the utility to use the enhanced command. See these sections in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*:

- Installation instructions: [Installing the Utility](#)
- Instructions to run commands: [Command Reference](#)

NEW SMART VIEW VERSION WITH SUPPORT FOR ALTERNATE HIERARCHY

Smart View for Office Release 11.1.2.5.620 is now available. This release contains new features such as Smart Form support for some Smart View functions, qualified name support for alternate hierarchies, Excel filter retention during ad hoc analysis, selectively deleting connections, and the ability to sort files and folders in the Smart View Panel, among other features. The Smart View 11.1.2.5.620 Readme, available on the Help Center, contains a complete list of new features in this release.

You must install this release to ensure compatibility with the February 2017 release features and to access the new functionalities. See “Installing Clients” in the Using Oracle Planning and Budgeting Cloud guide for instructions.

INDICATOR IN GRID CELLS FOR RELATED CONTENT

Starting with this update, reports opened in Financial Reporting Web Studio now display a red indicator at the top right corner of cells that have related content.

ABILITY TO USE PLANNING FORMULA EXPRESSIONS IN CALCULATION MANAGER

Starting with this update, you can use Planning formula expressions in Calculation Manager graphical or script rules.

REMOVAL OF SUPPORT

Oracle is committed to providing a simple and intuitive experience to the users of the service. To achieve this goal, service components are updated on a periodic basis. This section indicates upcoming major changes. Please send any questions and concerns you have to Oracle using the Provide Feedback option in the service.

STANDARD INTERFACE (ENTERPRISE PLANNING AND BUDGETING CLOUD WORKSPACE)

This change affects Planning and Budgeting Cloud Service customers who activated their subscriptions on or before July 31, 2016 only.

The Simplified Interface, an option available in the service since November 2014, will be established as the standard across the service. As a result, the current Standard Interface, which is also known as the Enterprise Planning and Budgeting Cloud Workspace, will be discontinued starting the December 2017 update (10 months from this update).

Starting with the December 2017 update, all service functionality will be available through the Simplified Interface only. To prepare for this change, have your users familiarize themselves with the Simplified Interface using the following information sources:

- [Accessing the Service](#) for steps to access service.
- [Working with Planning for Oracle Planning and Budgeting Cloud](#) for information on completing Planning tasks.
- [Administering Planning for Oracle Planning and Budgeting Cloud](#) for information on performing Planning Administrative tasks.

FINANCIAL REPORTING STUDIO DESKTOP CLIENT

Financial Reporting Web Studio, a component available in the service since March 2016, will be established as the only tool for designing and building reports. As a result, Financial Reporting Studio desktop client support will be fully transitioned to Financial Reporting Web Studio, tentatively starting May 2017. With the May 2017 update, Financial Reporting Studio desktop client will no longer be distributed.

As of the December 2016 update, Financial Reporting Web Studio has achieved parity with most of the functional capabilities available in Financial Reporting Studio desktop client. You will be able to create new reports and modify existing reports using Financial Reporting Web Studio.

Oracle recommends that you transition to using Financial Reporting Web Studio at the earliest opportunity. Please send questions and concerns to Oracle using the Provide Feedback option in the service.

DEFECTS FIXED

Defect Number	Description
25341001/ 25298300	Indent increases for each "generation by" are now recognized in both HTML and PDF Previews.
25327229	There is no longer a large spacing gap in the column headings when text is displayed over multiple lines.
25217220	The rundatarule command of the EPM Automate utility now executes correctly without errors.
22480818/ 25134767	On the Manage Exchange Rates page, the Year dropdown list is no longer limited to 25 years. All years in the application are now included in the Year drop-down list.
25063383	When you launch a rule in Planning, the rule no longer automatically uses the parameters that you used for the last run unless you select the Launch Last Value option in the dialog box for specifying runtime parameters.
25063335/ 24922033	You are now able to run business rules even if the member name contains a quotation mark.
25059253	The HTML view of a Financial Reporting book now correctly loads Financial Reporting reports.
24935228	If you have the appropriate privileges, you are now able to modify an entity in the Member Selector in Smart View.
24834295	Japanese PBCS applications whose Date Time Display is set to Automatically Detect now correctly display the year digits in date cells after you refresh the application.
24597978	The threshold limit of Year dimension has been increased to help customers extend planning model portfolios.
25236301	When you press ESC to exit a data form that was accessed via a Task List, your unsaved data is no longer lost.
25346383	Planners no longer receive "The current user cannot access the row or column members needed to process the current form" error when initiating a prediction in Predictive Planning.
25182628	You no longer receive validation errors for the Simplified Currency Script in the batch currconversion rule. You must create a new batch script after upgrade.
24765384	The Location folder in the Cloud "Inbox" repository can now be deleted.

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Integrated Cloud Applications & Platform Services

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