



Oracle Planning and Budgeting Cloud

What's New in the August Update (17.08)

July 2017

Revised: August 2017

TABLE OF CONTENTS

REVISION HISTORY	3
ORACLE PLANNING AND BUDGETING CLOUD, AUGUST UPDATE	4
ANNOUNCEMENTS AND NEW FEATURES	4
<i>Planning and Budgeting Cloud and Enterprise Planning and Budgeting Cloud</i>	4
Monthly Update Schedule	4
New Chart Type: Status Meter Gauge.....	4
Enhancements to Email Notification.....	5
Enhancements to the Log Messages in Calculation Manager.....	5
Processing Oracle General Ledger Adjustment in Data Management	5
Data Management Integration with the Financials Accounting Hub (FAH) and Financial Accounting Hub Reporting Cloud Service (FAHRCS).....	5
<i>Enterprise Planning and Budgeting Cloud Only</i>	6
Modifying Account Signage for Alternate Reporting Methods.....	6
Data Import Templates Available from Projects Business Process	6
Data Import Templates for Weekly Planning Available from Financials Business Process	6
New Formula Methods in Strategic Modeling.....	6
Ability to Create a Strategic Modeling Model from a Local .alc File.....	7
Changes Made with Audit Trail are Indicated in the Grid.....	7
<i>Smart View</i>	7
New Smart View for Office Version	7
REMOVAL OF SUPPORT	7
Standard Interface (Planning and Budgeting Cloud Workspace Interface).....	7
Financial Reporting Studio Desktop Client	8
File-Based Integration of Data Management with Oracle Fusion Financials Cloud.....	8
DEFECTS FIXED	8
CONSIDERATIONS	11
Audit Feature in Planning and Budgeting Cloud	11
Best Practices for the Property Dimension in Workforce Business Process	11

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
03 AUG 2017	Enhancements to Email Notification	Added enhancement.
03 AUG 2017	Defects Fixed	Added additional fixed defects.
28 JUL 2017		Initial Document Creation

ORACLE PLANNING AND BUDGETING CLOUD, AUGUST UPDATE

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

ANNOUNCEMENTS AND NEW FEATURES

PLANNING AND BUDGETING CLOUD AND ENTERPRISE PLANNING AND BUDGETING CLOUD

MONTHLY UPDATE SCHEDULE

Oracle will apply the latest updates to your test environment on Friday August 4, 2017 and to your production environment on Friday, August 18, 2017. The update will be applied during your normal daily maintenance window.

The Oracle Help Center, which provides access to updated documentation, will also be available on August 4, 2017.

NEW CHART TYPE: STATUS METER GAUGE

Dashboard designers can now select a new chart type called Status Meter Gauge, which shows where form values fall on a range that you set. Seeing where values fall on a red, yellow, and green bar can help you quickly assess how acceptable current values are. For example, you could use a gauge to display the current sales, where the thresholds are set to represent the sales targets.

You set the maximum values and labels for each range on the meter, and the meter displays where the values fall in the red, yellow, and green ranges. You can set the meter as horizontal or vertical.

If the form has multiple values, you can display multiple gauges, up to a maximum of 36 (the values in the first 6 rows and the first 6 columns in the form). The remaining values in the form are ignored. If you want the gauge chart to display only one value, then associate it with a form that has only one cell value.



To learn more about this chart type, see “Designing Dashboards” in *Administering Planning for Oracle Planning and Budgeting Cloud*.

ENHANCEMENTS TO EMAIL NOTIFICATION

Only one email notification (for the approved parent entity) is sent to the person promoting a planning unit and to the new owner of the planning unit. Separate email notifications aren’t sent for every child entity in the planning unit hierarchy.

ENHANCEMENTS TO THE LOG MESSAGES IN CALCULATION MANAGER

The following information has been added to the log messages in Calculation Manager:

- Pass Number - Number of passes of the rule.
- Pass Time - Execution time in seconds. This is the time elapsed between the generation of the current log message and the next log message.
- Cumulative Time - Total execution time in seconds. This is the total time elapsed since the rule execution began.
- Pass % - Percentage of the total time for that pass of the rule.
- Cumulative % - Percentage of the total time for all passes of the rule. When all the passes are complete, the cumulative percentage should be 100%.

PROCESSING ORACLE GENERAL LEDGER ADJUSTMENT IN DATA MANAGEMENT

Data Management now has the option to include adjustment periods from an Oracle General Ledger source system in the Oracle Financials Cloud when loading balances to an EPM Cloud application.

DATA MANAGEMENT INTEGRATION WITH THE FINANCIALS ACCOUNTING HUB (FAH) AND FINANCIAL ACCOUNTING HUB REPORTING CLOUD SERVICE (FAHRCS)

Data Management supports the Financials Accounting Hub (FAH) and the Financial Accounting Hub Reporting Cloud Service (FAHRCS) as part of its integration with the Oracle General Ledger.

MODIFYING ACCOUNT SIGNAGE FOR ALTERNATE REPORTING METHODS

In the Financials business process, for members in the Account dimension, administrators can now edit the Account Type and Variance Reporting options. Additionally, administrators can edit the Consolidation Operator for members in any dimension in the Financials cube (OEP_FS). This feature is useful if you want to report Revenue / Assets as positive data values and Expenses / Liabilities as negative values.

DATA IMPORT TEMPLATES AVAILABLE FROM PROJECTS BUSINESS PROCESS

For the Projects business process, data import templates are now available for download from within the application. The templates are generated based on the features you've enabled and custom dimensions you've added. From the Configure page for Projects, from the **Actions** menu, select **Download Data Load Templates**.

DATA IMPORT TEMPLATES FOR WEEKLY PLANNING AVAILABLE FROM FINANCIALS BUSINESS PROCESS

For the Financials business process, data import templates for weekly planning are now available for download from within the application. From the Configure page for Financials, from the **Actions** menu, select **Download Data Load Templates**.

NEW FORMULA METHODS IN STRATEGIC MODELING

New Freeform Formula methods are available in Strategic Modeling. The following methods are added to the existing list: @firsthist, and @isfirsthist.

@firsthist—This method returns a time period reference to the first historical period (the first period after the Beginning Balance period)

@isfirsthist— True when the referenced time period is the first historical period (the first period after the Beginning Balance period)

These methods refer to the first historical period (the first period after the Beginning Balance period).

The new methods are handy when compared to the following methods @firstpd and @isfirstpd, which used to reference the first historical period in the model, which accepts data for all account types, but now reference the Beginning Balance period for the model, where only Balance-type accounts accept data.

For more information, see *Working with Strategic Modeling in Smart View*.

ABILITY TO CREATE A STRATEGIC MODELING MODEL FROM A LOCAL .ALC FILE

In Strategic Modeling on the web, you can now create a model from a local .alc file if it has been converted in Smart View for use on the Cloud.

CHANGES MADE WITH AUDIT TRAIL ARE INDICATED IN THE GRID

In Strategic Modeling on the web, when an input value is changed using the Audit Trail, the changed cell is indicated in the grid with a yellow background until the model is calculated.

SMART VIEW

NEW SMART VIEW FOR OFFICE VERSION

Smart View for Office 11.1.2.5.710 will be available by mid-August. This version fixes a number of defects. The Smart View 11.1.2.5.710 Readme, available on the Help Center at the time of release, contains a complete list of the defects addressed in this version.

You must install this version to ensure compatibility with the August 2017 update features and to access the new functionalities. See [Installing Clients](#) in “Using Oracle Planning and Budgeting Cloud” for instructions.

REMOVAL OF SUPPORT

STANDARD INTERFACE (PLANNING AND BUDGETING CLOUD WORKSPACE INTERFACE)

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 not be supported starting with the December 2017 update to the service (December 1, 2017 for test instances and December 15, 2017 for production instances). After the deployment of the November update to production instances on November 17, 2017, bugs or enhancements for the Standard Interface will not be addressed.

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.
- “Displaying the Simplified Interface” in *Administering Planning for Oracle Planning and Budgeting Cloud*.

- [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

Oracle is committed to providing a simple and intuitive user experience. To achieve this, Financial Reporting Web Studio, available since March 2016, will become the only environment for designing and building reports.

Oracle is providing additional time for users to transition from Financial Reporting Desktop Studio to Financial Reporting Web Studio. Tentative plans call for functional parity between Financial Reporting Web Studio and Financial Reporting Desktop Studio in late 2017, at which time, support for the desktop Studio will transition to the Web Studio and distribution of the Desktop Studio will cease.

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.

FILE-BASED INTEGRATION OF DATA MANAGEMENT WITH ORACLE FUSION FINANCIALS CLOUD

Oracle Fusion Financial Cloud Budgetary Control and Encumbrance Accounting is now fully integrated with Data Management.

This enhancement brings the integration of Oracle Fusion Financials Cloud with Oracle Enterprise Performance Management Cloud on par with the current, out of the box, file-based integration. As a result, the file-based integration will be phased out starting the September update to the service.

If you are using file-based integration between Oracle Fusion Financials Cloud and Oracle Enterprise Performance Management Cloud, Oracle recommends that you adopt this new integration as soon as possible.

DEFECTS FIXED

Defect Number	Description
24911371	Forms containing replacement dimension data can be opened in Smart View as well as from web launch in Oracle Financial Consolidation and Close Cloud.
25102673	You can now use the Select Members window for the page axis after saving a Financial Reporting report into a folder name that includes Japanese.

Defect Number	Description
25361071	When inserting data or formula rows in a report in Financial Reporting Web Studio, the existing formulas now update to show the correct rows.
25665380	An error no longer occurs when drilling through to supplemental data on forms.
25728658	The Job Console now displays consistently.
25800527	Generation indentation now works correctly on form grids when Suppress Missing Blocks is enabled.
25887552	The bottom row of data in a form is no longer obscured by the horizontal scroll bar.
25895359	Forms now reliably show data in all rows.
25946424	Users can't launch a business rule from a task list if they're assigned No Launch access to the business rule.
26087482	The task list report now correctly shows which tasks are dependent.
26091516	A ruleset that has Enable Parallel Execution selected and that is launched with EPM Automate no longer displays that it is "processing" when in fact it has executed successfully.
26092192	Spaces are no longer added after comma delimiters during data export.
26168435	If linked grids are inserted into a report, the report is not displayed in the Reports section in the Simplified User Interface. To work around this, insert a new single cell hidden grid in the report in order for the report to be displayed.
26185022	Smart Push associated with saving a form now consistently executes.
26195615	In the Standard Interface, launched business rules that exceed their maximum wait time now display a correct message that the business rule is running in background mode and that the user can check its status in the Job Console.
26196942	The <i>Working with Planning for Oracle Planning and Budgeting Cloud</i> guide now clarifies that copying/pasting data to Excel and the Spreadsheet Export feature copy data that is visible in the cell, but does not copy Supporting Detail, cell comments, or row labels.
26198717	Chrome users can now consistently see data in a form, regardless of the Zoom setting. Expand and Collapse work as expected.
26199755	When a dashboard contains multiple objects, each object's menus

Defect Number	Description
	correctly and consistently display.
26269732	When exporting attachment references during a back up or migration, the export no longer fails.
26281369	When you select the Prompt for POV option for a report and then change the member in the POV by entering its name, the report's contents now correctly reflect the changed member.
26290555	Data cells in forms now display consistently for Chrome users, regardless of their Zoom or Display setting.
26330405	You can now run a book with prompts in the Chrome browser.
26332257	On composite forms, the POV on the form's header now matches the POV in the pencil icon (Edit Page POV) dialog box.
26352443	You can now edit prompts created in Financial Reporting Web Studio.
26355348, 26496980	Migration no longer fails when exporting valid intersection rules that contain attribute dimension members in the definition.
26374777	In Calculation Manager, the Formula Member Selector no longer displays Add Special for functions.
26397026	Valid for Cubes changes are now persisting after a migration.
26397092	In the Financials business process of Enterprise Planning and Budgeting Cloud, the Year Over Year trends now calculate correctly even when data in the previous year is simply entered into Adjustment.
26423196, 26476354	<p>When working with alias tables, Enterprise Planning and Budgeting Cloud correctly handles duplicate member names in the following areas:</p> <p>When switching the alias table from None to Default, and attempting to submit data. Data can now be submitted successfully when the alias table is switched to Default.</p> <p>In cases where children of root members have aliases, but the root member does not.</p>

CONSIDERATIONS

AUDIT FEATURE IN PLANNING AND BUDGETING CLOUD

In 17.07, Oracle introduced a preview of the “Audit” feature for Planning Cloud in the Simplified Interface. This feature will be enhanced further in the next few months and will be announced as part of the release notes once the release timeline for this feature is firm.

BEST PRACTICES FOR THE PROPERTY DIMENSION IN WORKFORCE BUSINESS PROCESS

Oracle is committed to providing customers with a robust, configurable Workforce framework. To ensure performance and best practice design for Workforce in Enterprise Planning and Budgeting Cloud, Oracle will disable the ability to add additional members to the Property dimension in the October 2017 update to the service. The ability to add members to the Property dimension was unintended, and can seriously impact performance.

Oracle recommends that best practice is to add custom members to the Account dimension and not the Property dimension. Oracle recommends that you move all custom members that you added to the Property dimension to the Account dimension and re-accommodate data and artifacts that leverage these custom members. Oracle recommends that you update your Workforce models as soon as possible. If you have questions about this recommendation, contact Support.



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Integrated Cloud Applications & Platform Services

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