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# **PBCS: ENABLEMENT FOR PROJECT TEAMS**

This two day course has been designed to provide an understanding of PBCS that will enable project teams to make a more valuable contribution to the design and implementation of PBCS applications.

## **Learning Objectives**

Gain an insight into the features and capabilities of this cloud-based solution and understand fundamental concepts that underpin business planning processes, such as the use of drivers to streamline the planning cycle.

## **Course Description**

An in-depth overview of PBCS, ideal for project managers and design teams that need to get up to speed fast. It covers everything that project teams need to know about the capabilities of the system and explores the interface, typical planning processes and the flow of data from source systems. The course provides a thorough grounding in architecture and functionality and explores key design considerations and how to apply best practice during the build, maintenance and support of PBCS applications.

We'll explore top-down and bottom-up planning strategies and you'll get an understanding of how a budget submission could take place across your organisation. Understand how Task Lists can guide users through the planning process and how security controls both system access and the integrated approvals process. We'll demonstrate how to compare budget versions within PBCS and explore the methodologies for adjusting forecasts and undertaking top-down allocations. Attendees will also investigate the power of driver-based planning as a means of efficiently generating accurate plans and find out how data from different sources can be brought into a PBCS application using the sophisticated Data Management (FDME) tool. See the ways in which plan data can be adjusted, translated and aggregated within PBCS before being analysed with powerful reporting tools such as Financial Reporting or in Microsoft Office using Smart View.

## Course Information:

Audience:	Project and implementation teams
Pre-requisites:	None
Delivery Method:	Classroom (Group-Live)
Advanced Preparation:	None
Recommended CPE Credits:	14 Credits - Specialized Knowledge and Applications
Programme Level:	Intermediate

## Day Summary

- Day 1: PBCS overview, functionality, navigation, terms and concepts, typical planning processes, workflow, completing a budget submission, adjusting forecasts.
- Day 2: Top-down allocations, translation and aggregation, driver-based planning, dimensionality, plan types, data forms and task lists, data entry, loading source data, data management (FDMEE), security, approvals process, reporting.

## Detailed Course Agenda

- Review of architecture**  
 Understand how PBCS leverages Essbase technology and works with other solutions such as Data Management (FDMEE) Financial Reporting Web Studio and Smart View in order to provide a complete end-to-end workflow for Budget and Forecast submission and reporting.
- Overview of PBCS functionality**
- Navigation of the interfaces**  
 PBCS can be accessed through two main interfaces; the Web and Smart View (Excel). Compare and contrast the functionality available in each interface and the benefits of using each.
- Review key terms and concepts**  
 Review the key PBCS terms relating to Dimensions, Members and the wider application. Explore the concepts that are key to the planning process in PBCS to gain a "big picture" understanding of how things fit together.
- Overview of reporting solutions**  
 Review of running Financial Reports and interaction with Smart View
- Typical planning processes**  
 Actual, Budget and Forecast scenarios
- Reviewing the workflow**
- Completing a Budget Submission**
- Comparing Budget Versions**  
 PBCS allows for multiple Versions of your Budgets and Forecasts to be prepared. Discuss how this functionality can be leveraged to provide an iterative planning process with the ability to perform "scenario planning".
- Adjusting Forecasts**  
 A variety of adjustment techniques are available when working with PBCS, allowing you to amend individual values or adjust whole data ranges as required.
- Top-Down Allocations and Bottom-Up Strategies**  
 PBCS allows you to prepare plans using both bottom-up and top-down methods. Discuss the pros and cons of each approach.
- Translation and Aggregation**  
 When working with multi-currency applications, you can automate the translation of data to the available reporting currencies.
- Driver-Based Planning**  
 Customisable calculations allow you to embed a driver-based approach in your planning process. Discuss the various techniques that can be used for this in order to minimise data entry.
- Understanding PBCS dimensionality**
- Applications and Plan Types**
- Data Forms & Task Lists Overview**
- Data Entry Methods**
- Loading Data**
- Source Data Integration and Data Management (FDMEE)**  
 The Data Management screen which can be accessed directly from PBCS allows you to define a consistent, auditable process for loading source data into your application.
- Understanding Security**
- The Approvals Process**  
 Undertake a simple approvals process in order to review the various available options for the promotion, delegation and sign off of planning data.
- Running Financial Reports**
- Smart View**
  - Ad Hoc Analysis  
 Discover the benefits of using Ad Hoc Analysis functionality to create queries and analyse data from PBCS.
  - Smart View across Microsoft Office  
 Understand how Smart View can be used across the suite of Microsoft Office products such as Word, PowerPoint and Outlook.

