



**keyteach**<sup>™</sup>

# PBCS: KEY USER & SMART VIEW



This one day course has been designed for key users of Oracle's cloud-based Planning and Budgeting solution (PBCS) and provides extensive learning around the use of Smart View ad hoc analysis and data forms.

## About this Course

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.

Learn to navigate the key user components and understand the transformation of source data that can be loaded to PBCS. Find out about manual data entry techniques such as editing, adjusting and spreading data across multiple time periods and gain an understanding of how key calculations are performed using business rules.

Business rule can also be used in driver based planning. This technique will be explored during the course to understand how it can aid data entry using saved assumptions as drivers.

We'll explore top-down and bottom-up planning to appreciate the difference between the two methods. Paying attention to how data can be entered at different levels and the requirements of business rules to ensure data aggregates and allocates correctly.

Discover how currency translation takes place and explore the approvals process. Find out how to use Sandboxes and how to copy data between different versions to capture snapshots of plans.

The course also explores the use of Smart Forms and provides an understanding about how to schedule tasks that may need to run at specific times. Explore the powerful analysis tools available within PBCS such as Financial Reporting, dashboards and Ad Hoc Analysis.

Also available  
as self-paced  
user e-learning



**USER**  
e-Learning

## Course Information:

Audience:	PBCS Key Users
Pre-requisites:	None
Delivery Method:	Classroom (Group-Live)
Advanced Preparation:	None
Recommended CPE Credits:	7
Programme Level:	Introductory

## Detailed Course Agenda

### Introducing PBCS

- Planning concepts
- Web interface vs Smart View
- Application types
- Terminology, dimensions and documents
- Data, metadata and attribute dimensions
- Navigating the simplified interface
- Working with tasks
- Task list icons
- Application settings

### Data Forms

- Accessing data forms
- POV and member selection
- Cell colors
- Cell icons

### Data Entry Techniques

- Simple data entry
- Spreading and adjusting data
- Entering supporting detail and comments
- Actions drop-down
- Data and format panels

### Business Rules

- Understanding business rules
- Launching business rules
- Driver-based planning
- Bottom-up and top-down planning

### Data Management

- Sources of data
- Mapping tables
- Import, validate and export data

### Processing Data

- Currency translation and approvals
- Copy data between versions
- Sandboxes
- Scheduling jobs

### PBCS Ad Hoc Grids

- Ad Hoc panel
- Ad Hoc operations and options

### Reports and Dashboards

- Financial Reports
- PBCS dashboards

### Smart View:

#### Introducing Smart View

- Making a connection
- Smart View panel and ribbon
- Cell colors
- Smart View options

#### Smart View Ad Hoc Analysis

- POV and member selection
- Ad Hoc operations
- Planning Ad Hoc ribbon
- Cascading reports

#### Entering and Processing Data

- Accessing task lists
- Working with data forms
- Planning ribbon
- Submitting and refreshing data
- Comments and supporting detail
- Adjust data and grid spread
- Calculating data
- Smart Forms
- Monitoring job statuses
- Managing approvals
- Copying versions

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