

Oracle Planning and Budgeting Cloud

September Update (16.09)

Release Content Document

August 2016

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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 AUG 2016		Initial Document Creation

PLANNING AND BUDGETING CLOUD, SEPTEMBER UPDATE

This guide outlines the announcements and fixed issues in the upcoming Oracle Planning and Budgeting Cloud and Enterprise Planning and Budgeting Cloud release.

ANNOUNCEMENTS AND NEW FEATURES

ACTIVITY REPORT

The Activity Report, which is automatically generated every day, enables Service Administrators to understand application usage over a period of five, ten, thirty or sixty days. It helps streamline application design by identifying calculation scripts and user requests that impacts application performance. Information contained in this report includes:

- Number of users who signed into the application each day
- Percentage of requests that took more than 10 seconds to complete
- Top seven Planning requests that took the most time to complete
- Top 30 worst performing actions that took over 10 seconds to complete
- Number of users per hour
- Number of users based on how long they were signed into the application
- Top 10 users based on how long they were signed into the application
- Application design changes that occurred over the reporting period

To view the Activity Report:

1. Sign into a service instance.
2. Click **Application**, then **Overview**, and then **Activity**.
3. For **Reports from last**, select a report duration (5 days, 10 days, 30 days or 60 days).
4. Click a report name.

Activity Report

2016-08-24 06_24_06

All Times in Pacific Standard Time

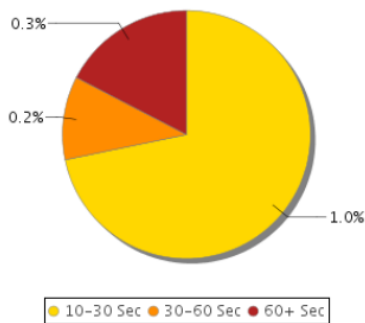
Number of Users

Metric	08/18	08/19	08/20	08/21	08/22	08/23	Today
Users	-	-	-	-	-	6	12
Usage Duration in Hours	-	-	-	-	-	5	9
Users Last 7 Days	-	-	-	-	-	14	17
Users Last 30 Days	-	-	-	-	-	35	36

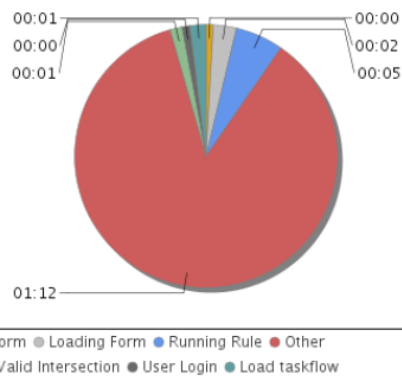
User Provided Feedbacks

Time	User	Feedback
15:03:06	jareinem	Feedback: SmartView feedback
15:13:42	jareinem	Feedback: Feedback from Web.

Percentage of UI Requests over 10 Seconds (1.5%)



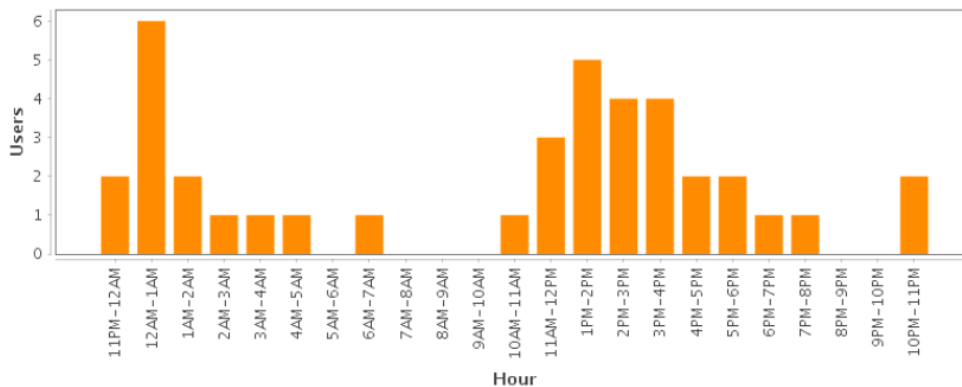
Top 7 UI Requests by Duration (Hours:Minutes)



Top 30 Worst Performing User Interface Actions over 10 Seconds

Duration (Min:Sec)	User	Time	Screen	Action	Object	Durations (Min:Sec)
03:01	jane.doe@example.com	12:40:14	Planning	Running Rule	Rule Name=OWP_Process Loaded Data	Business Rules=03:00
02:56	john.doe@example.com	11:48:05	Planning	LogOn		
02:15	john@example.com	12:01:42	Planning	LogOn		
02:06	jane@example.com	12:37:21	Planning	LogOn		
02:03	john.doe@example.com	12:36:44	Planning	LogOn		
01:59	james@example.com	13:33:25	Planning	LogOn		
01:43	jane.doe@example.com	12:15:10	Planning	LogOn		
01:30	john@example.com	12:24:17	Planning	LogOn		
01:25	john.doe@example.com	13:26:54	Planning	LogOn		

Number of Users by Hour



SUPPORT FOR DIRECT LINKS

The service now supports direct URL links to Planning forms and dashboards. You can use direct page links to create a URL that points to a specific form or dashboard. If users have appropriate access permissions, they can use the URL to go directly to the form or dashboard to view or update it within Planning and Budgeting Cloud. For more information, see *Integrating with Oracle Enterprise Performance Management Cloud*.

NEW GUIDE: INTEGRATING WITH ORACLE ENTERPRISE PERFORMANCE MANAGEMENT CLOUD

Integration information is now documented in the new *Oracle Cloud Integrating with Oracle Enterprise Performance Management Cloud* guide. This release includes information on:

- Using Direct URL Links for Forms and Dashboards in Oracle Planning and Budgeting Cloud
- Sample Starter Kit for Consultants - Integration with Business Intelligence Cloud Service

APPLICATION REPLICATION PROCESS

The *Using Oracle Planning and Budgeting Cloud* guide now contains an appendix that details the steps involved in configuring a secondary instance of Oracle Planning and Budgeting Cloud to ensure availability of service if the primary Oracle data center becomes unavailable due to unforeseen circumstances.

SMART PUSH FROM SOURCE TO TARGET CUBE FROM DASHBOARDS

Smart Push feature can be enabled in the forms used in Dashboard. You can also use Smart Push to synchronize data between a source cube and a target cube by clicking Save on a grid used within the Dashboard or by launching it from the grid by clicking Action.

DATA MANAGEMENT LOCATION SECURITY

In this release, Location Security has been enabled under Security Settings. Location security allows a Service Administrator to assign users to specific Data Management Locations through user groups with a view to securing data and mapping rules for a user or a group of users.

For more information on this feature, see *Administering Data Management for Oracle Enterprise Performance Management Cloud*.

DATA MANAGEMENT INBOX RENAMED AS HOME

The top-level Data Management folder has been renamed to Home. Previously, this folder was named Inbox; it contained inbox and outbox subfolders. With the rename, the Home folder now contains two subfolders: inbox and outbox.

This change does not impact your automation scripts.

DATA LOAD INTO OTHER SERVICES

Data from Planning and Budgeting Cloud and Enterprise Planning and Budgeting Cloud can now be loaded directly into Financial Consolidation and Close Cloud and Account Reconciliation Cloud. Additionally, you can load data from the Fusion GL Cloud into Financial Consolidation and Close Cloud, and Account Reconciliation Cloud. In prior releases data load was supported only for Planning and Budgeting Cloud and Enterprise Planning and Budgeting Cloud.

TEXT-BASED DATA LOAD

The text-based data load feature enables users to load text data, dates, and smart lists to applications that support these data types. Additionally, users can load data files that include multiple balance columns for a selected calendar period. For example, users can load HR data into Workforce Planning processes in Enterprise Planning and Budgeting Cloud using Data Management.

TRANSLATION UPDATES

This release includes online help and guides translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese. It also includes a Dutch translation for the *Working with Smart View 11.1.2.5.600 for Oracle Enterprise Performance Management Cloud* online help and guide.

CHANGE OF BEHAVIOR: PLANNING ADMIN EXTENSION

When you import a dimension using the Planning Admin Extension in Smart View, a predefined set of dimension metadata member properties is now displayed in the grid, instead of displaying all member properties on the grid. Use the Member Selection dialog box to add other metadata member properties to the grid.

For more information, see "Default Metadata Dimension Member Properties" in *Oracle Cloud Administering Planning for Oracle Planning and Budgeting Cloud*.

NEW USER INTERFACE

All services provisioned after July 31, 2016 will, by default, be configured to use the Simplified Interface. If your service was provisioned on or before July 31, 2016, you can switch the application interface to Standard Interface.

To switch the display to Standard Interface:

1. On the Home page, select Application, and then Settings.
2. In UI Display, select Standard Interface.
3. Click Save.

CHANGES TO USER INTERFACE AND NAVIGATION PATHS

The Simplified User Interface in release 16.09 includes incremental improvements for navigation and usability. This release makes some usability and navigation changes to the out of box default navigation flows and home page layout. The changes effected in this release are detailed in the documents available in the [Oracle Planning and Budgeting Cloud Help Center](#).

AUTOMATIC RELEASE UPDATES FOR BUG FIXES

This release automatically applies bug fixes to the application. If you are in the process of modifying application metadata, for example, as a part of application development process, you must refresh application cube prior to the upgrade to commit the changes you made.

While applying this update, Oracle will make changes to metadata, which requires a cube refresh as a part of the upgrade process. If errors are encountered during cube refresh, the application is placed in maintenance mode and cube refresh errors are recorded as a part of the `Content Upgrade` job. You can view details of this job in the Jobs window.

Fix the metadata issues that caused cube refresh errors and then run a cube refresh before taking the application out of maintenance mode.

CHANGE OF BEHAVIOR: METADATA EXPORT

Metadata exported from Enterprise Planning and Budgeting Cloud will no longer contain any property information for factory metadata. Properties such as member formula and data type are suppressed; only the parent and data storage columns are exported. Customizations made to factory members are tracked and exported separately to the customization file of the applicable module.

If you migrate an application that contains customizations in multiple stages, for example, migrate one dimension at a time, you must export and import the following:

- Metadata of the dimension
- Customizations from the customization file

DEFECTS FIXED

Defect Number	Description
24426647	You can copy and paste content on web form in the Simplified Interface accessed using Firefox.
24425364	While migrating application metadata, you are now able to migrate changes made to seeded members. This fix involves a change in behaviour .
24394277	When you the service to open a Smart Form created in Smart View, the form defaults to maximum decimal precision as follows: <ul style="list-style-type: none"> • Currency and non-currency: 0 • Percentage: 2
24394247	Financial reports that are designed to use the Y-T-D function now renders correctly to display Y-T-D member.
24355511	You are now able to validate and deploy sequences rules.
24354808	Attribute values are now maintained when you rename a member.
24349888	You are now able to save the data that you enter into a form.
24330977	The @SUMRANGE Calculation Manager function now works as designed when arguments are passed.
24303700	You can now update an approval unit hierarchy in an existing workflow.
24299029/ 24298652	In the Simplified Interface, suppression now works when you create a form that contains a formula column.
24297239	Data entry forms no longer display columns that do not contain data.
24296057/ 23710069	Entity dimension now display all relevant attribute values.
24284866	Outline Load Utility now correctly loads text and smartlist to the planning application.
23729489	You are now able to select entity members by using filters while launching business rules from a task.
23710069	You no longer get errors during business rules execution caused by missing attribute values in Entity dimension.
23642801	The Copy Validation Rules option is now available in all columns that contain validation rules even if a rule is not set in the first column (column A).
23641072	Financial reports now display the preferred date format (for example, YYYY-MM-DD) that you specified in Financial Reporting preferences.
23625593	In the Simplified Interface, the service now correctly opens links that are included in workflow email.
23615385	The EMP Automate Utility now runs the runbusinessrule command correctly

Defect Number	Description
	when the business rule name is in a language other than English.
23558565	You are now able to exclude a parent cost center from the approvals hierarchy.
23542538	From Calculation Manager, you are now able to deploy rule sets to the application.
23540913	The web form folders are now alphabetically sorted in both Smart View and the Planning application.
23536633	Turning on suppression no longer changes alias tables in locally installed Financial Reporting Studio.
23302224	Financial Reporting Web now retains font style when you reopen the format setting dialog box for formatting cells.
23292237	You are now able to exclude members from Planning forms using the Add Exclusion option.
23269969	You are now able to generate a Financial Reporting book in PDF format even if you select A4 paper size.
23153249	Financial Reporting Web now maintains all column and row formatting that you specified.
23028387	You are now able to manually edit suffixes in Financial Reporting Web to enter a percentage sign and right parenthesis.
22691095	You are now able to copy the contents of a business rule in Calculation Manager to notepad.
22249314	You are now able to delete application to purge Data Management.
20677935	Forms no longer display two vertical scroll bars in the Simplified Interface.
23742714	Task lists are now available in the Standard Interface.
23639926	You no longer receive the Object with name already exists error when loading members with aliases that contain Turkish characters.
23762177	The service now saves simplified currency data in forms.
23757262/ 23756989/ 23756233/ 23745265/ 23735205	<p>The option to switch the application interface to Standard Interface is now available for all Oracle Planning and Budgeting Cloud service instances provisioned on or before July 31, 2016.</p> <p>To switch the display to Standard Interface:</p> <ol style="list-style-type: none"> 1. On the Home page, select Settings. 2. In UI Display, select Standard Interface. 3. Click Save.
23748464/ 23753973	Substitution variables are now available in forms.

Defect Number	Description
23747809	Application Management now displays correctly.
23090446	Planning Admin Extension now displays the list of dimensions in Smart View even if you use & (ampersand) in the dimension name.
22220265	You are now able to use members in Smart View ad hoc even if a regular month is also on the sheet.
20332708	You are now able to specify a percentage value less than 1 for members in forms for charts in Planning dashboards.



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Integrated Cloud Applications & Platform Services

16.09