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# PBCS: DESIGN APPLICATIONS

Gain a comprehensive understanding of PBCS to enable the design and creation of more effective, optimised and better performing applications in this in-depth two day training course.

## Pre-Requisite

This two day course follows on from the PBCS Maintain Applications course that is a pre-requisite for this more advanced training that is designed for consultants, designers and administrators to extend their knowledge of PBCS design concepts and activities.

## Learning Objectives:

Learn how to design and build PBCS applications, develop planning and budgeting models, load and manipulate data and metadata in PBCS applications. Gain an in-depth understanding of how to make efficient use of the capabilities and extensibility of PBCS. Learn how to leverage the potential of this powerful solution in order to build more effective applications and workflows.

## Course Description:

This course focuses on the options, functionality and design considerations that

impact performance of PBCS applications. You'll learn how to apply best practice techniques during the development process.

You'll learn about the multi-dimensional hierarchies supported by PBCS and gain an appreciation of the complexities and possibilities of the solution. Find out what can be achieved through a detailed understanding of the underlying structure of the PBCS solution. Learn how to build data forms, load data, explore more detailed calculations and understand the planning cycle. See the ways in which plan data can be adjusted, translated into different currencies and aggregated within PBCS.

This course will equip attendees with the necessary tools and knowledge to design and build effective, responsive and highly optimised applications.

## Course Information:

Audience:	Implementation consultants, developers, technical system administrators
Duration:	2 days
Pre-requisites:	PBCS: Maintain Applications
Delivery Method:	Classroom (Group-Live)
Advanced Preparation:	None
Recommended CPE Credits:	14 Credits - Specialized Knowledge and Applications
Programme Level:	Intermediate

## Summary by Day:

**Day 1:** Designing applications, dimensions, plan types, loading metadata, design considerations, building forms and task lists, custom menus, smart lists, composite forms, Data Management (FMEE) setup.

**Day 2:** Detailed calculations, substitution variables, top-down allocations, setup of approvals process, translation and aggregation, driver-based planning, grid diagnostics, cell history.

PLEASE NOTE: This course is designed for consultants, designers and administrators to extend their knowledge of PBCS design concepts and activities. This two day course follows on from the 'PBCS Maintain Applications' course that is a pre-requisite for this more advanced training.

### • Review of architecture

Understand how PBCS leverages Essbase technology and works with other solutions such as FMEE (Data Management), Financial Reporting Web Studio and Smart View in order to provide a complete end-to-end workflow for budget and forecast submission and reporting.

### • My Services

Understand the layout of the cloud environment administration console; My Services. Explore how users can be created and assigned roles, and how various metrics can be tracked using the My Services dashboard.

### • Application and plan types

Understand application settings and the significance of working with multiple ASO and BSO Plan types.

### • PBCS dimensionality

Explore the key dimensions used in a PBCS application, along with their associated properties. Student will consider the impact of decisions made when building dimensions and explore the consequences for system performance.

### • Creating applications

Explore the variety of options and design decisions available when creating new PBCS applications. There are a number of application options that will fundamentally alter how an application will function. Understand how these options work in order to control the functionality and performance of an application.

### • Loading metadata

Metadata can be changed manually or uploaded and refreshed from a CSV upload. You'll also explore the simplified dimension editor that comes with PBCS.

### • Designing Data forms & task lists

Task lists guide users through the planning process and data forms provide a window to the database for the review and manipulation of data.

### • Building Custom menus

Learn how to enhance navigation within PBCS through the development of custom menus that enable users to more easily access custom content.

### • Grid diagnostics

PBCS allows for the monitoring of data form performance within an application.

### • Data Auditing

Students will review the available data auditing capabilities so that changes to data can be tracked over time.

### • Setup of source data integration and Data Management (FMEE)

The Data Management screen which can be accessed directly from PBCS allows you to define a consistent, auditable process for loading source data. You'll explore the key setup steps required to make use of this functionality.

### • Designing an 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. You'll discover how to set up a Planning Unit hierarchy and perform the required Scenario and Version assignment. In this course attendees will undertake all the necessary steps to design, manage and maintain an effective approvals process on an ongoing basis.

### • Advanced calculation

Understand how to work with Calculation Manager to design, maintain and deploy more advanced business rules for a PBCS application.

### • Substitution variables

Add flexibility through the use of dynamic substitution variables for use in data forms and business rules.

### • 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 EPM Automate

Discover how the EPM Automate utility can help to streamline and automate common tasks such as loading data and managing the Cloud environment.