



DATA TRANSFORMERS

THE MONTHLY WEBINAR SERIES

Moving from MaxL to EPM Automate for Oracle Planning & Budgeting Cloud Service (PBCS)

PHIL SABLE

Manager, Planning & Analysis Practice

About MindStream

MindStream Analytics is a leading consulting and managed services provider with a proven track record for helping leading global companies address their enterprise challenges, focused on delivering sustainable profitability and competitive advantage.

Data is a new economic asset that is rapidly expanding and changing. You're challenged to figure out how to use it to your organization's advantage. We work collaboratively with our clients and bringing innovative strategies that enable organizations to gain competitive edge and win with data.

MindStream has been recognized by *CIOReview* in November 2015 as a 100 "Most Promising Oracle Solutions Provider," ProformaTech for our innovation, and others for our innovative thinking and business analytic applications expertise. In 2015, MindStream was named by MSPmentor as a "Top 501 Managed Services Provider." We were recently named "Top 10 Fastest Growing Data Analytics Company 2016" by *The Silicon Review*.



Agenda

- Introduction MindStream Analytics – Phil Sable
- Overview of topics covered
- Moving from MaxL to EPM Automate
- Summary
- Questions

About Phil Sable

- 15 years of Planning Experience
- 20 years of Essbase & BI Experience
- Oracle Certified Expert in Hyperion Planning & Essbase
- Manager, Planning & Analysis Practice



Topics Covered

- What is EPM Automate
- Why use EPM Automate
- EPM tasks that are commonly automated
- Creating an EPM Automate scripts
- Demo
- Summary

What is EPM Automate?

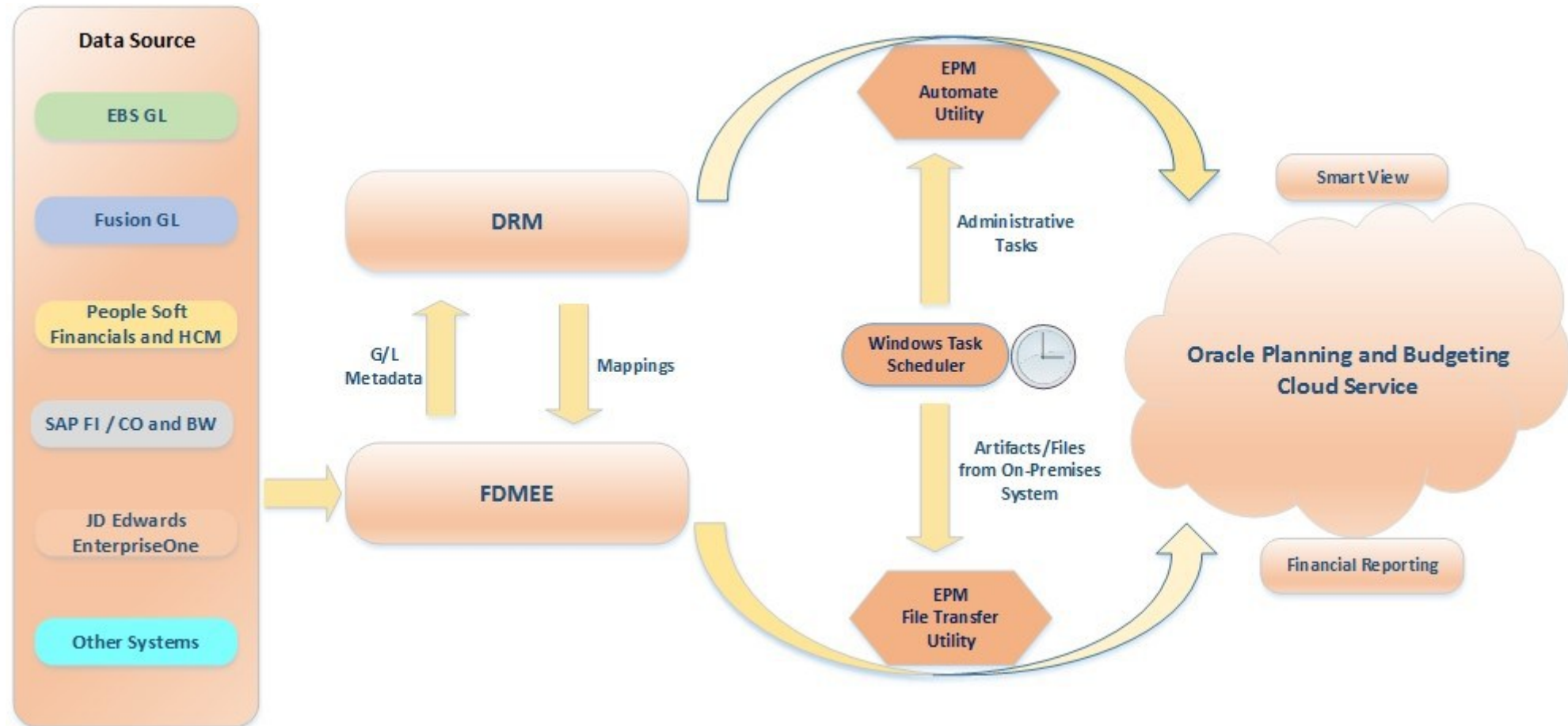
What is EPM Automate?

- Should not to be confused with EPMA
- EPM Automate is a utility that comes with the new Oracle Planning and Budgeting Cloud Service (PBCS)
- It uses secure HTTP connections to communicate the PBCS Service instance
- This utility enables Service Administrators to remotely perform and automate various administrative tasks.
- Administrators can create scripts that are capable of completing a wide array of tasks and automate their execution using Windows Scheduler

EPM Automate Tasks

- Import and export metadata and data
- Refresh the application
- Run business rules on data
- Copy data from one database to another
- Upload and manage files into service instances
- Run a Data Management batch rules
- Export and import application and artifact snapshots

EPM Automate Architecture



Why use EPM Automate?

Why Use EPM Automate?

- In response to companies looking for more decentralized services with less IT overhead, Oracle has launched the Planning and Budgeting Cloud Service (PBCS).
- PBCS is a hosted version of the Oracle Hyperion Planning and Data Management/Integration (FDME) tools with a particular focus on a completely online-based interface
- When moving to Oracle PBCS you no longer have direct access to the Essbase server's operating system
- Without access to the Essbase server we also lose access to the tool that is commonly used to automate a wide variety of administrative tasks, MaxL
- To address this, Oracle has developed a new utility named EPM Automate.

Tasks commonly automated Using MaxL

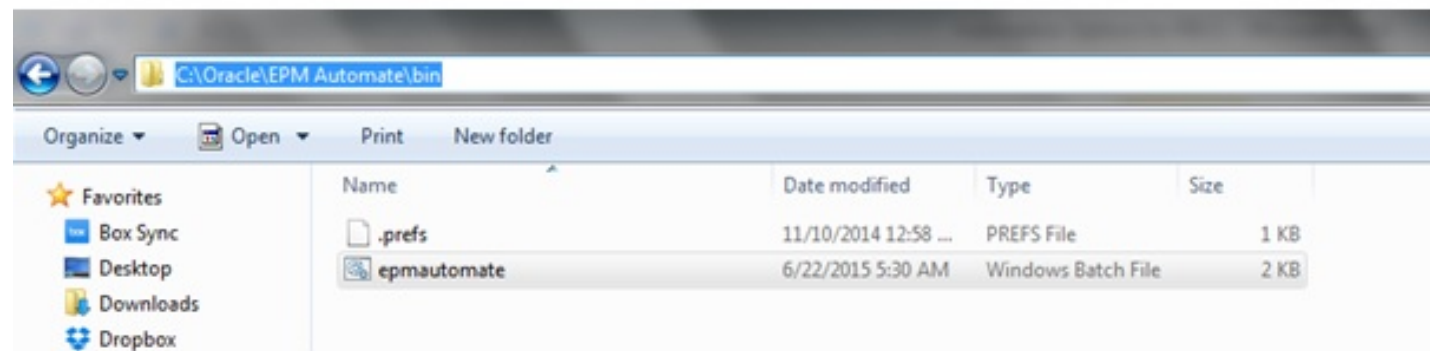
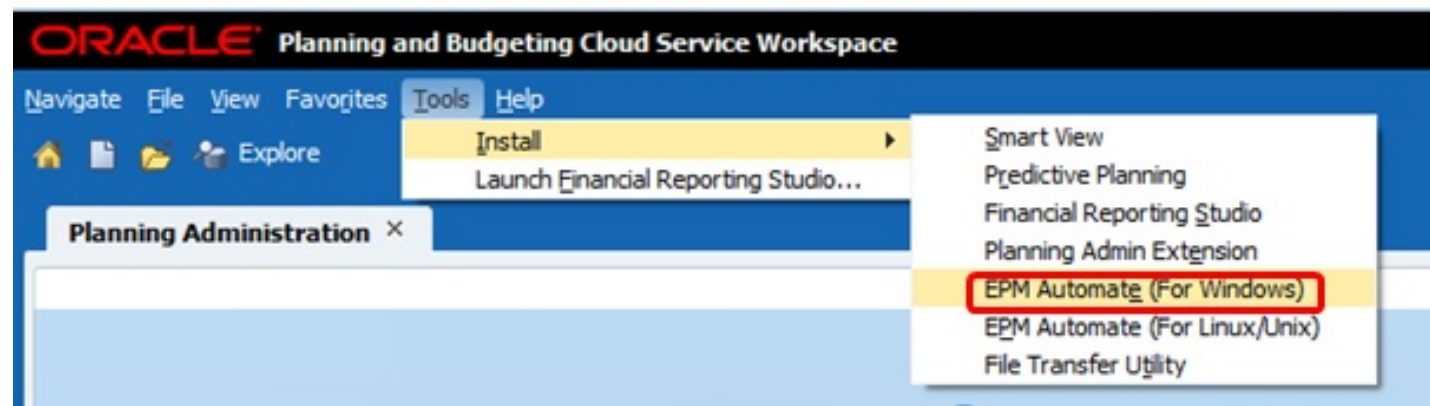
- Import and export data
- Dimension metadata updates
- Refresh the application
- Run business rules
- Creating Backups
- Updating Variables



Creating an EPM Automate Scripts

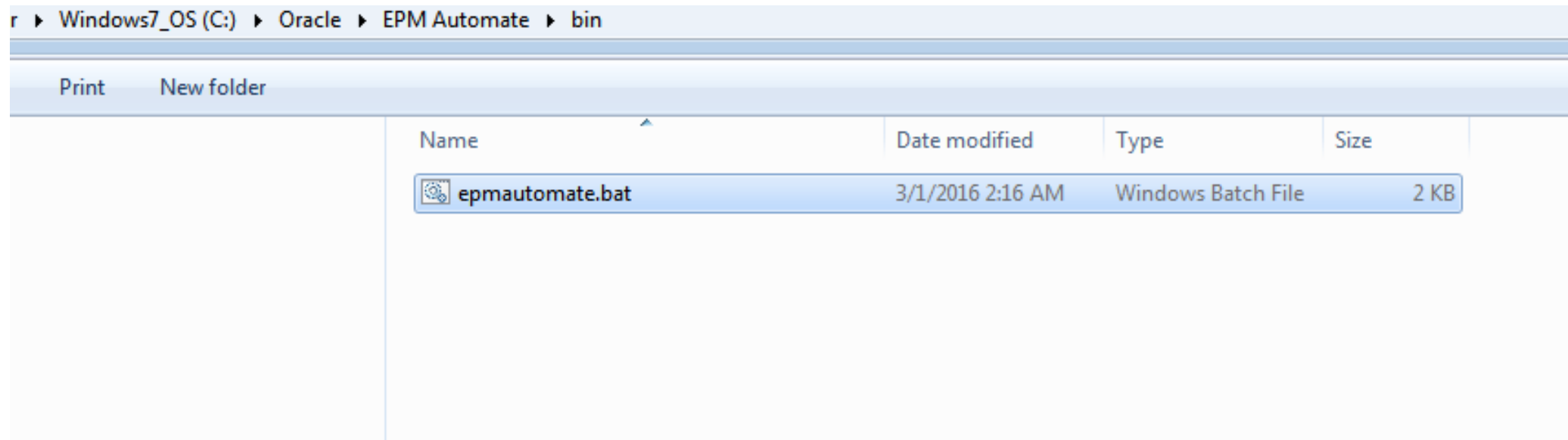
Installing EPM Automate

To install EPM Automate downloaded the utility from the Oracle PBCS workspace by navigating to Tools > Install



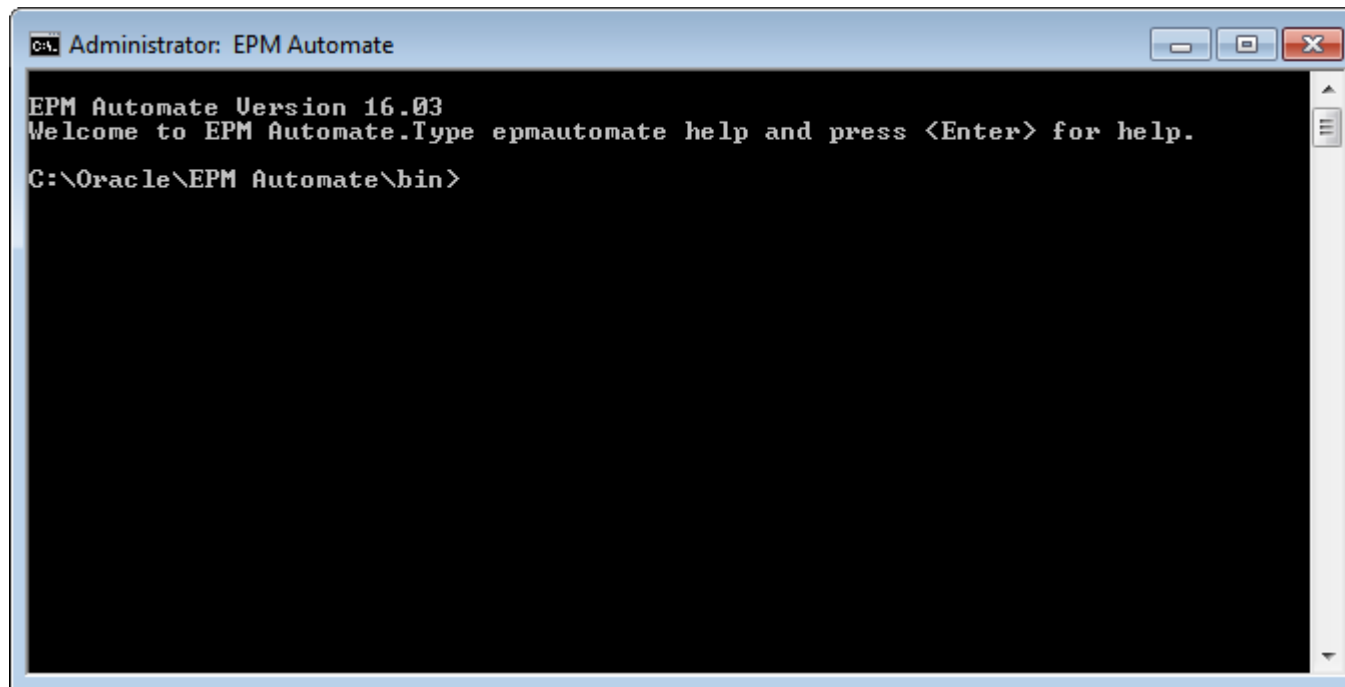
Running EPM Automate

Double clicking on the batch file that is installed starts the EPM Automate Utility.



Running EPM Automate

A new command line windows opens when you start EPM Automate

A screenshot of a Windows command prompt window titled "Administrator: EPM Automate". The window has a black background with white text. The text inside the window reads: "EPM Automate Version 16.03", "Welcome to EPM Automate.Type epmautomate help and press <Enter> for help.", and "C:\Oracle\EPM Automate\bin>". The window has standard Windows window controls (minimize, maximize, close) in the top right corner.

```
Administrator: EPM Automate

EPM Automate Version 16.03
Welcome to EPM Automate.Type epmautomate help and press <Enter> for help.
C:\Oracle\EPM Automate\bin>
```


EPM Automate Help

Type 'epmautomate help' and hit enter to open
Oracles EPM Automate online help

ORACLE Help Center Welcome Philip >

Working with EPM Automate for Oracle Enterprise Performance Management Cloud

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 - Command Reference
 - Command Execution Sample Scenarios

Feedback Download

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2 Command Reference

Information that you need to run the utility are organized based on the service with which you are working. Typically, you should refer to two sections; general and a service specific section; to work with a service.

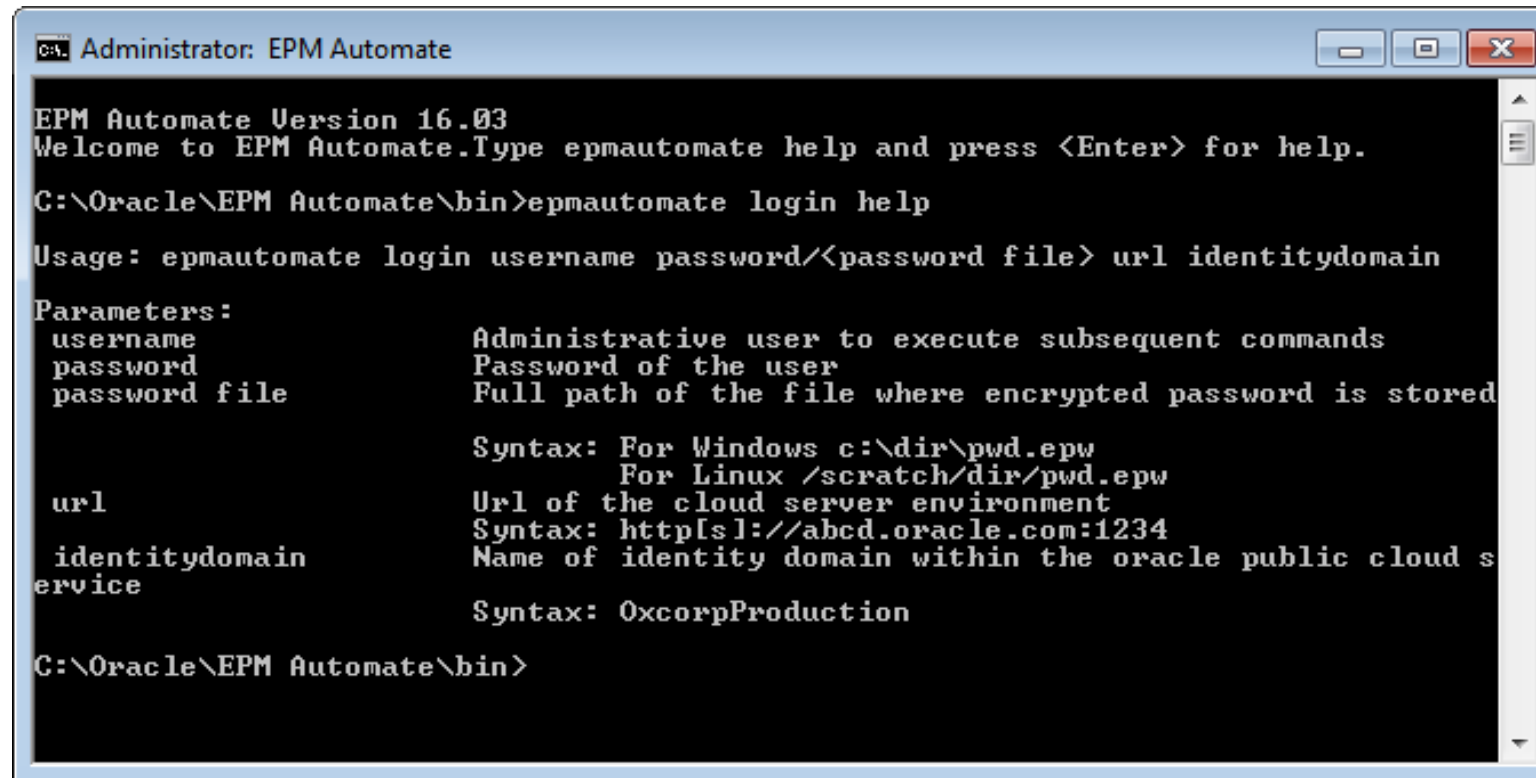
- EPM Automate Utility Commands Applicable Across Services
- Oracle Planning and Budgeting Cloud-Specific Commands
- Data Management-Specific Commands
- Oracle Account Reconciliation Cloud-Specific Commands

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EPM Automate Login Help

Type 'epmautomate login help' for information on the command line parameters needed to login to EPM Automate



```
Administrator: EPM Automate

EPM Automate Version 16.03
Welcome to EPM Automate.Type epmautomate help and press <Enter> for help.

C:\Oracle\EPM Automate\bin>epmautomate login help

Usage: epmautomate login username password/<password file> url identitydomain

Parameters:
username          Administrative user to execute subsequent commands
password          Password of the user
password file      Full path of the file where encrypted password is stored

                  Syntax: For Windows c:\dir\pwd.epw
                  For Linux /scratch/dir/pwd.epw
url               Url of the cloud server environment
                  Syntax: https://abcd.oracle.com:1234
identitydomain    Name of identity domain within the oracle public cloud s
ervice
                  Syntax: OxcorpProduction

C:\Oracle\EPM Automate\bin>
```

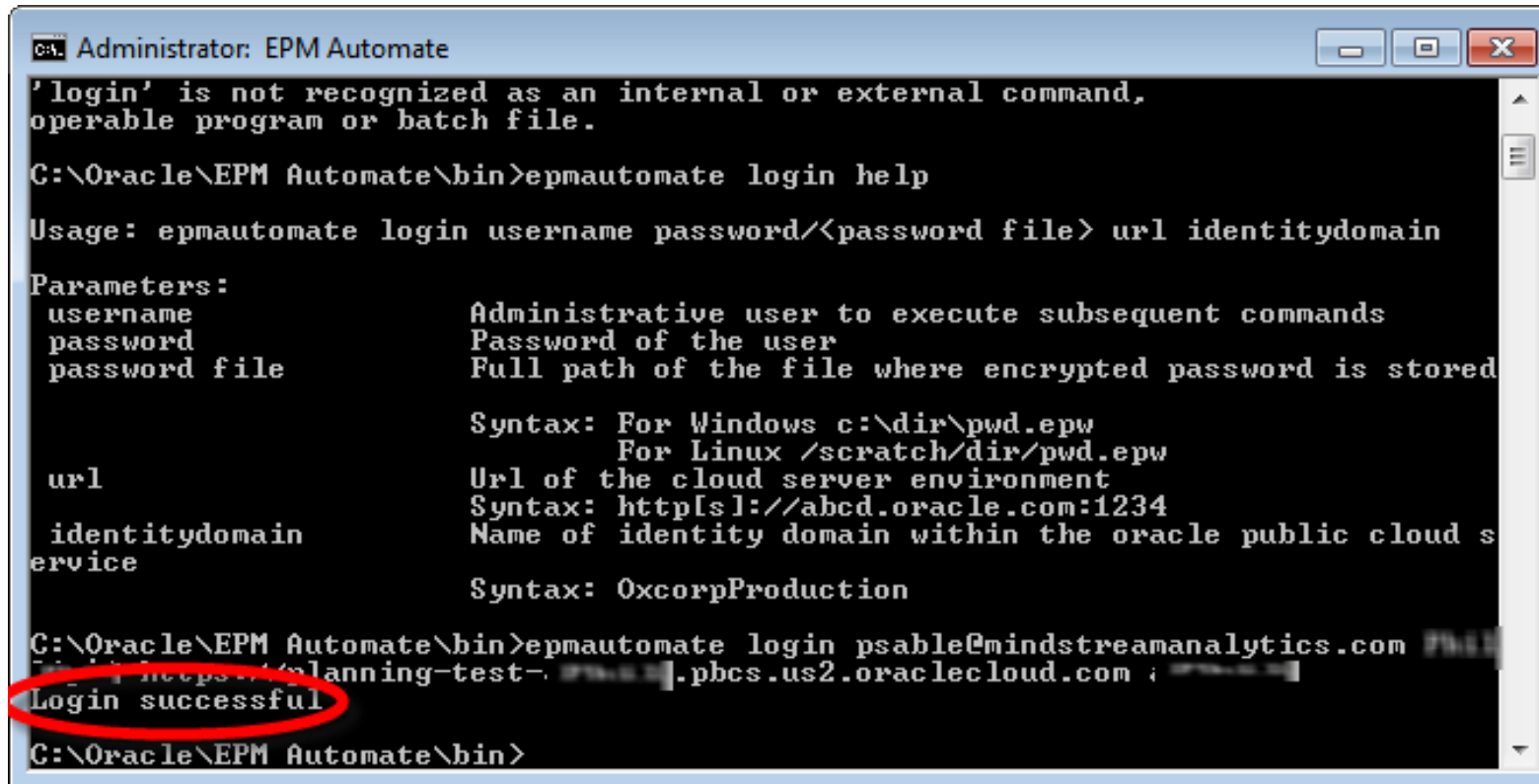
EPM Automate Login

The login command needs the username, password, url and the identity domain parameters. Here is an example of a login command:

```
C:\Oracle\EPM Automate\bin>epmautomate login psable@mindstreamanalytics.com   
[redacted] https://planning-test-  
[redacted].pbcs.us2.oraclecloud.com ;
```

EPM Automate Login

A “Login Successful” message is displayed when you are logged into EPM Automate



```
Administrator: EPM Automate
'login' is not recognized as an internal or external command,
operable program or batch file.

C:\Oracle\EPM Automate\bin>epmautomate login help

Usage: epmautomate login username password/<password file> url identitydomain

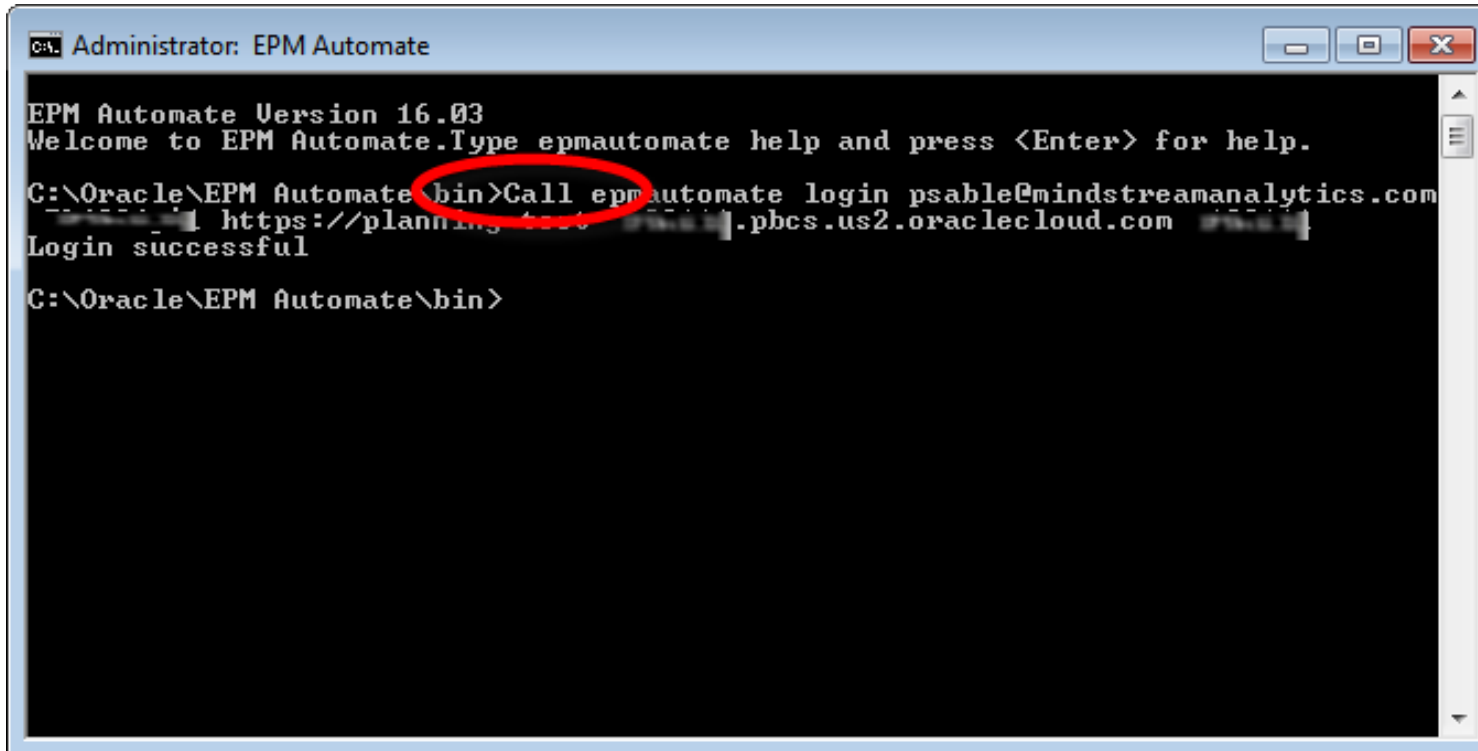
Parameters:
  username      Administrative user to execute subsequent commands
  password      Password of the user
  password file  Full path of the file where encrypted password is stored

  url           Syntax: For Windows c:\dir\pwd.epw
                For Linux /scratch/dir/pwd.epw
                Url of the cloud server environment
  identitydomain Syntax: http[s]://abcd.oracle.com:1234
  service       Name of identity domain within the oracle public cloud s
                Syntax: OxcorpProduction

C:\Oracle\EPM Automate\bin>epmautomate login psable@mindstreamanalytics.com https://planning-test-01.pbcs.us2.oraclecloud.com
Login successful
C:\Oracle\EPM Automate\bin>
```

EPM Automate Login

Like MaxL this utility can be called from a batch file and this allows you to do lights out automation using any common task scheduler



```
C:\Oracle\EPM Automate\bin>Call epmautomate login psable@mindstreamanalytics.com
https://planning.fishbase.org/pbcs.us2.oraclecloud.com
Login successful
C:\Oracle\EPM Automate\bin>
```

Oracle PBCS Inbox/Outbox Folder

- All files uploaded to Oracle PBCS using the EPM Automate utility get uploaded to the Inbox/Outbox folder
- There is a new second interface delivered with PBSC called the Simplified Interface
- Not to worry the standard interface is still available if you prefer
- However the Inbox/Outbox folder can only be accessed only through the PBCS Simplified Interface
- To go to Simplified interface, navigate to Administer->Planning and Budgeting Service and then click on Simplified Interface

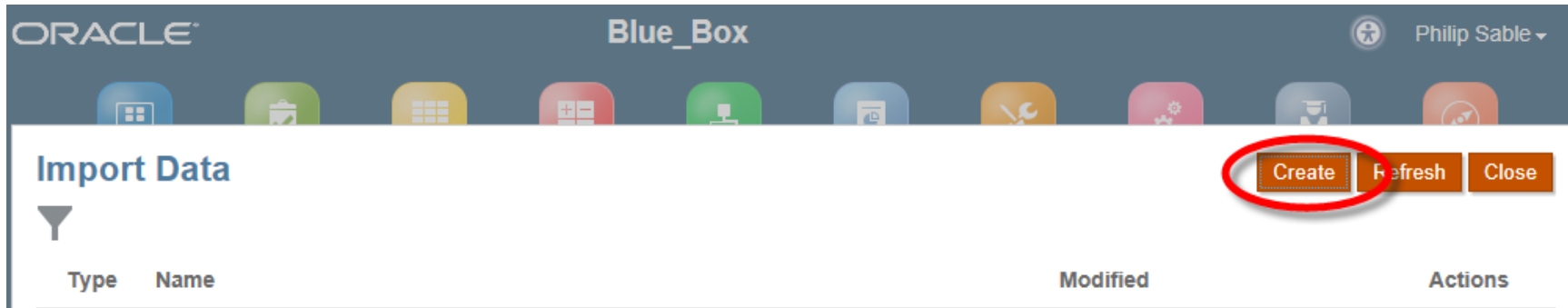
Oracle PBCS Inbox/Outbox Folder

From the Simplified Interface, click on the 'Console' option. You will see the Inbox/Outbox Explorer under 'Actions'

The screenshot displays the Oracle PBCS Simplified Interface. The top navigation bar is dark blue and contains the Oracle logo, the application name 'Blue_Box', and the user name 'Philip Sable'. Below the navigation bar is a row of ten icons representing different functions: Dashboards, Tasks, Plans, Rules, Approvals, Reports, Console, Settings, Academy, and Navigator. The 'Console' icon is highlighted. Below the navigation bar is the 'Application' section, which includes tabs for Overview, Plan Types, and Dimensions. The 'Overview' tab is selected. The 'Application' section shows the application name 'Blue_Box', a description field, and a type of 'Advanced'. To the right of the application details are three boxes showing counts: Tasks (66), Plans (19), and Rules (1). On the far right, there is a 'Refresh' button and an 'Actions' dropdown menu. The 'Actions' menu is open, showing a list of options: Import Data, Export Data, Refresh Database, Remove Application, Maintenance Time, and Inbox/Outbox Explorer. The 'Inbox/Outbox Explorer' option is circled in red.

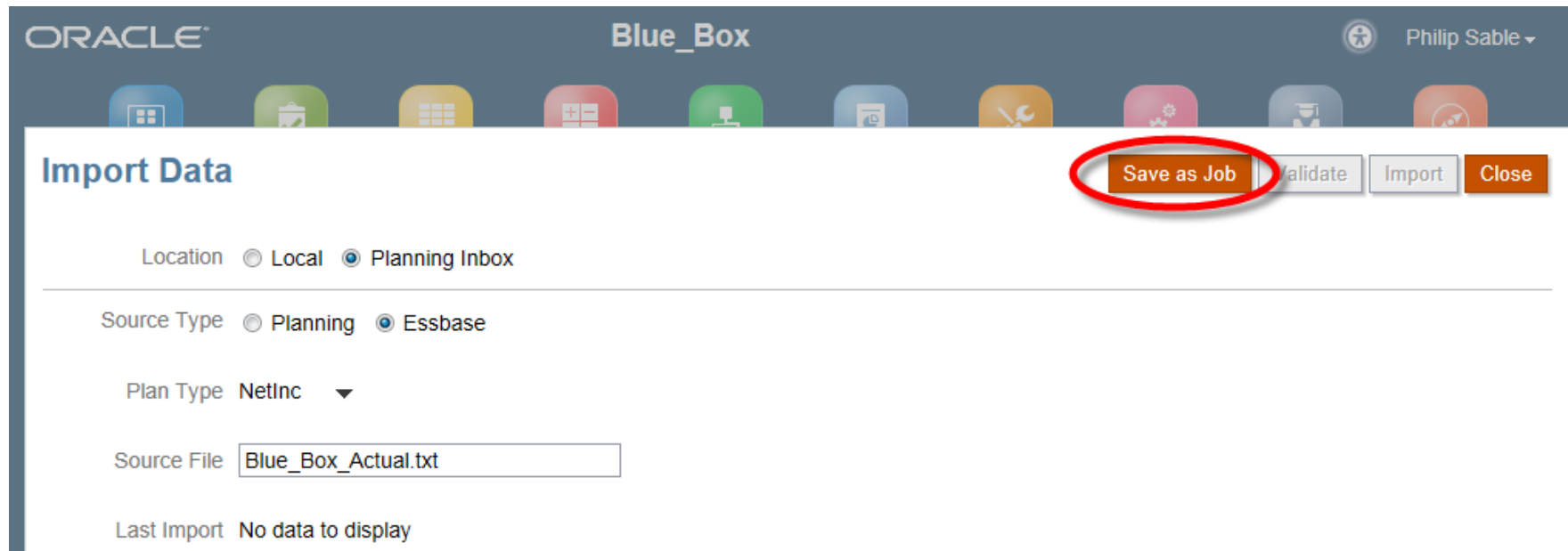
Setting up an Import Data Job

- Before you use epm automate to automate certain tasks, you need to setup an import or export operation and save that as a job and then use epm automate to refer to that job and carry out the import or export operation
- To setup an import job, from Console click on 'Actions' -> Import Data. (To create an export job, click on Export) On the Import Data page, click on 'Create'.



Setting up an Import Data Job

- Click on 'Save as Job' to create the job
- To Enter a job name and then click on save.

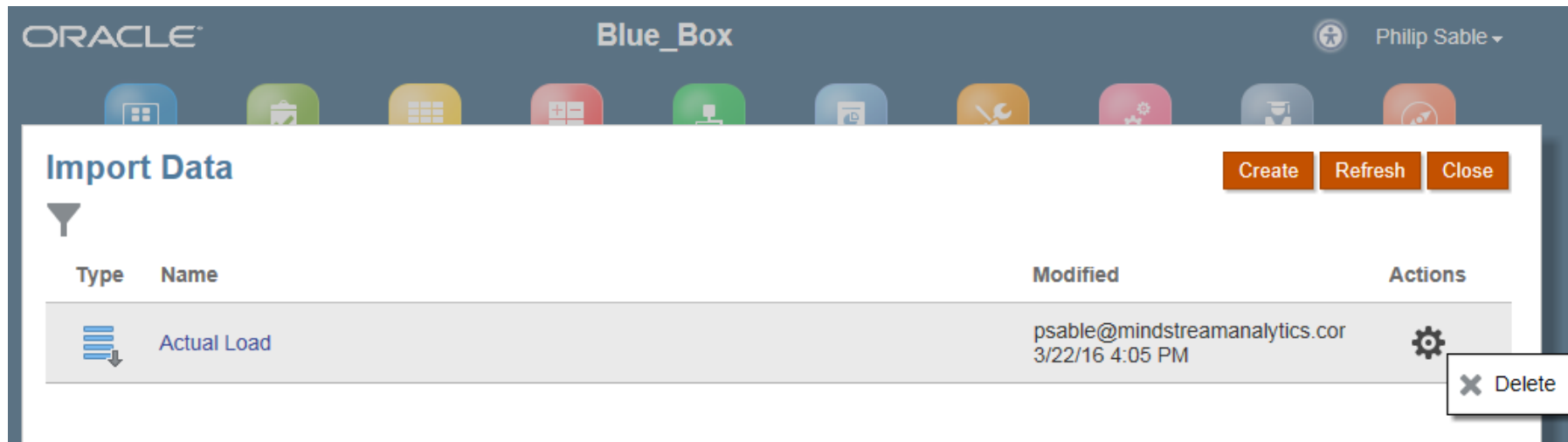


The screenshot shows the Oracle Blue_Box interface with the 'Import Data' dialog box open. The dialog box has a title bar with 'ORACLE' and 'Blue_Box'. Below the title bar is a toolbar with several icons. The 'Import Data' dialog box contains the following fields and buttons:



- Location:** Radio buttons for 'Local' and 'Planning Inbox' (selected).
- Source Type:** Radio buttons for 'Planning' and 'Essbase' (selected).
- Plan Type:** A dropdown menu showing 'NetInc'.
- Source File:** A text input field containing 'Blue_Box_Actual.txt'.
- Last Import:** A label indicating 'No data to display'.
- Buttons:** 'Save as Job' (circled in red), 'Validate', 'Import', and 'Close'.

Setting up an Import Data Job

- You will be redirected to the Console which will now show you the job you just created
- Click on Close. If you need to delete this job click on settings icon and then click delete.

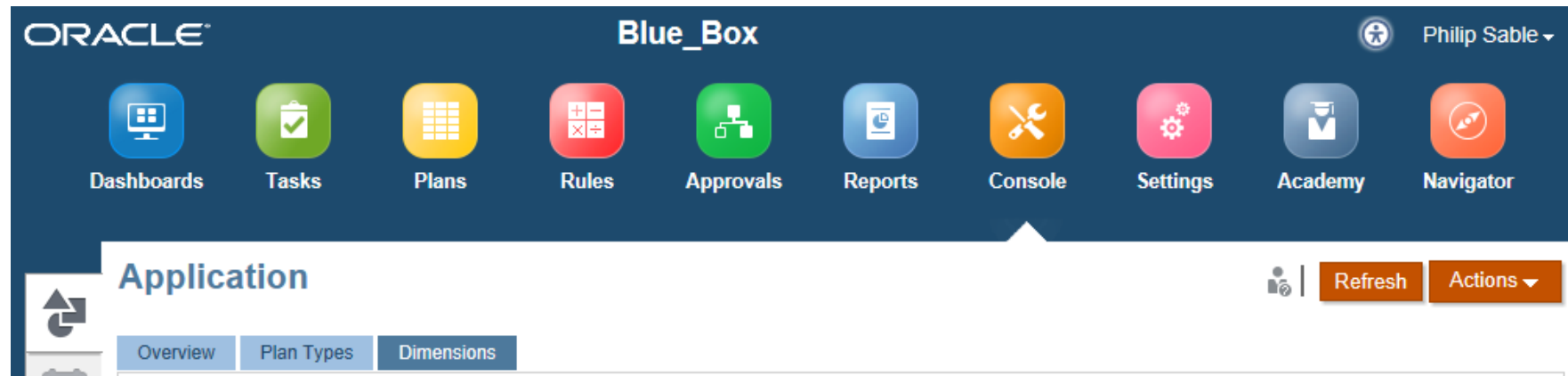


The screenshot shows the Oracle Blue_Box console interface. At the top, the Oracle logo and 'Blue_Box' title are visible, along with a user profile for Philip Sable. Below the header is a row of colorful icons representing different system components. The main content area is titled 'Import Data' and features a filter icon, a table of jobs, and action buttons (Create, Refresh, Close). The table has columns for Type, Name, Modified, and Actions. A single job is listed: 'Actual Load' with a Type icon of a document with a downward arrow. The 'Modified' column shows the email 'psable@mindstreamanalytics.cor' and the timestamp '3/22/16 4:05 PM'. The 'Actions' column contains a settings gear icon, which has a 'Delete' dialog box open next to it.

Type	Name	Modified	Actions
	Actual Load	psable@mindstreamanalytics.cor 3/22/16 4:05 PM	 Delete

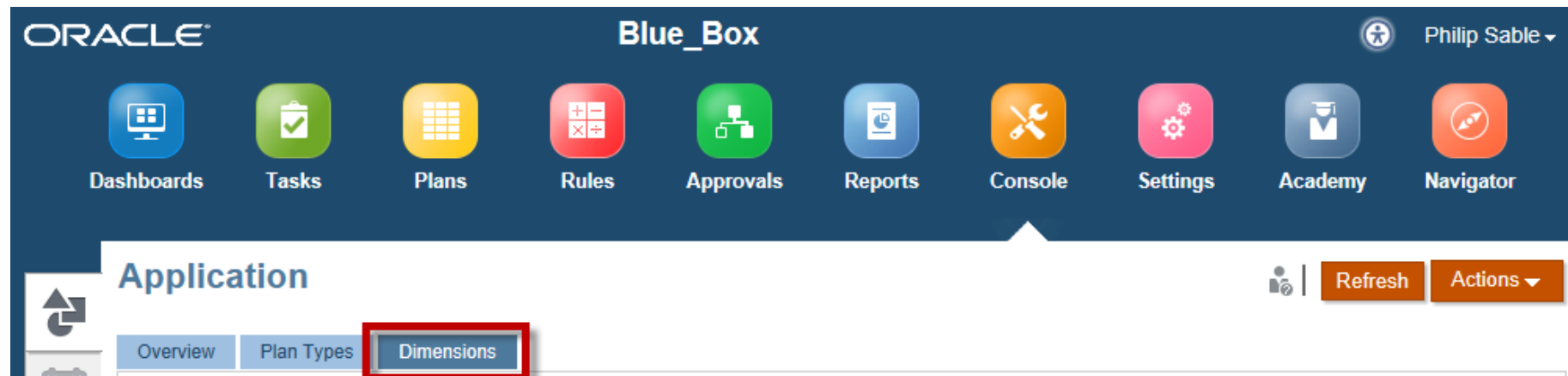
Setting up an Import Metadata Job

- To set up an import metadata job, from the Simplified Interface, navigate to 'Console' and then select the 'Dimensions' tab.



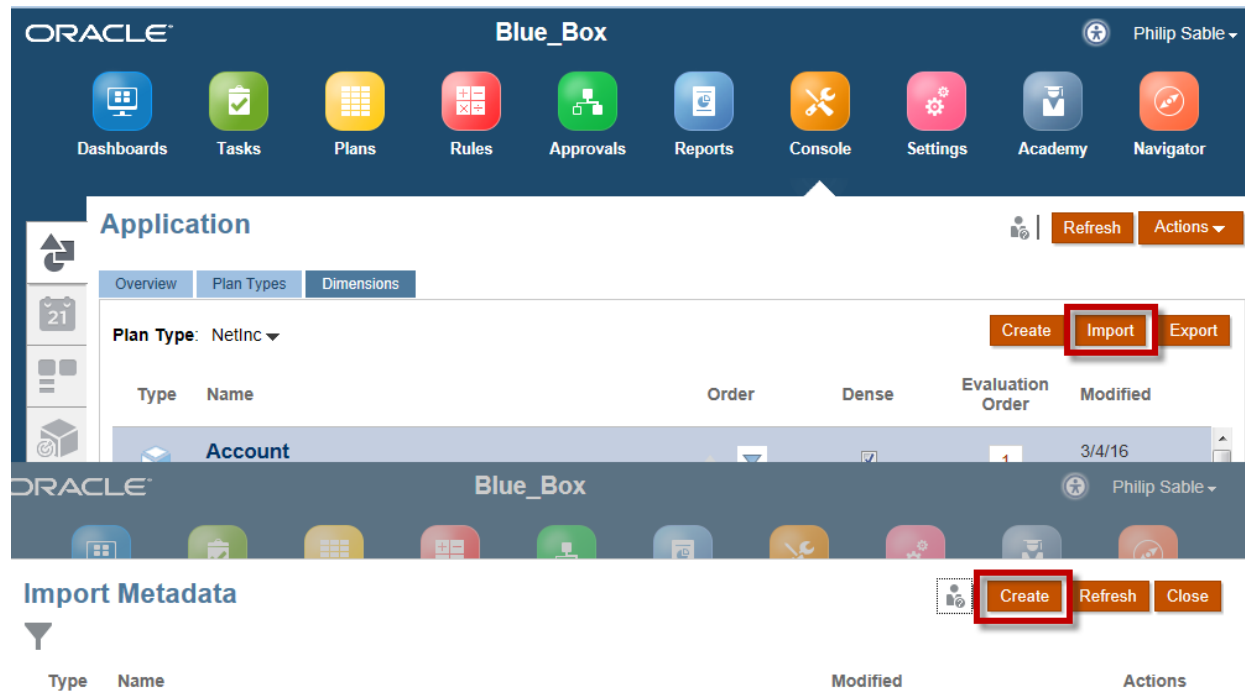
Setting up an Import Metadata Job

- To set up an import metadata job, from the Simplified Interface, navigate to 'Console' and then select the 'Dimensions' tab.



Setting up an Import Metadata Job

- To Then from within the 'Dimensions' tab, click on 'Import' (To create an export job, click on Export)
- Click on 'Create'



Setting up an Import Metadata Job

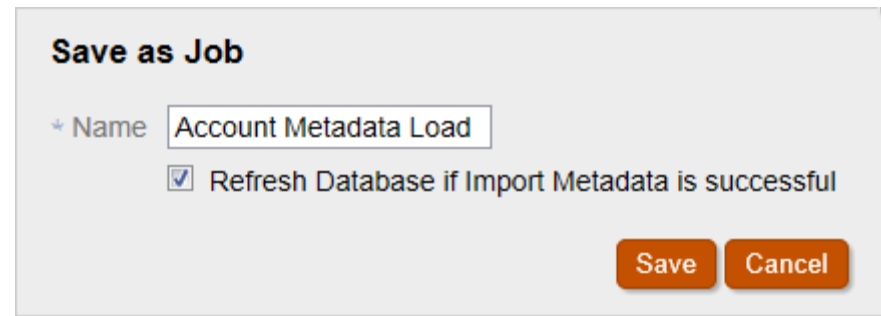
- Select Location as Planning Inbox
- Specify the import file name
- Select a File Type
- Put a check on the 'Clear Members' in case you want to clear all members before loading the new file

The screenshot shows the 'Import Metadata' window in the Oracle Blue_Box application. The interface includes a top navigation bar with the Oracle logo and 'Blue_Box' title. Below the navigation bar, there are several icons representing different data sources. The main area is titled 'Import Metadata' and contains a table with columns: Dimension, Import File, File Type, Clear Members, and La. The 'Location' is set to 'Planning Inbox'. The 'Import File' is 'Metadata_Account.csv' and the 'File Type' is 'Comma delimited'. The 'Clear Members' checkbox is checked.

Dimension	Import File	File Type	Clear Members	La
Account 108 Members	Metadata_Account.csv	<input checked="" type="radio"/> Comma delimited <input type="radio"/> Tab delimited <input type="radio"/> Other	<input checked="" type="checkbox"/>	2/2 psa Co

Setting up an Import Metadata Job

- Click on 'Save as Job'
- Provide a name for the job
- Click on Save and then click on OK



The screenshot shows a 'Save as Job' dialog box. It has a title bar 'Save as Job'. Below the title bar, there is a label 'Name' with a small blue asterisk icon to its left. To the right of the label is a text input field containing the text 'Account Metadata Load'. Below the input field, there is a checked checkbox followed by the text 'Refresh Database if Import Metadata is successful'. At the bottom right of the dialog box, there are two orange buttons: 'Save' and 'Cancel'.

Setting up EPM Automate batch file

- In this example I have setup two batch files to load FXRates
- The first batch file “Login.bat” contains the login id, password URL and identity domain parameters
- We will pass these parameters to the second batch file “LoadBudFXRates.bat” containing the epm automate commands.
- The contents on Login.bat are below

```
set loginid=psable@mindstreamanalytics.com
set password=[REDACTED]
set url=https://planning-test-[REDACTED].pbcs.us2.oraclecloud.com
set domain=[REDACTED]
call C:\PBCSAutomation\FXRates\LoadBudFXRates.bat
```


Setting up EPM Automate batch file

- Here are the contents of the LoadBudFXRates.bat file.
- The sequence is as follows:

```
call epmautomate login %loginid% %password% %url% %domain%
call epmautomate deletefile Metadata_Account.csv
call epmautomate uploadfile "C:\PBCSAutomation\FXRates\Metadata_Account.csv"
call epmautomate importmetadata "Acc_Metadata_Load_Job"
call epmautomate refreshcube
call epmautomate deletefile Bud_FXRates.txt
call epmautomate uploadfile "C:\PBCSAutomation\FXRates\Bud_FXRates.txt"
call epmautomate importdata "Load_Bud_FXRates_Job"
call epmautomate runbusinessrule "Currency" "planType=NetInc"
call epmautomate logout
```

Encrypting Your EPM Automate Password

- With out encryption the username and password can be accessed from the Login.bat file.
- When the Login.bat file is launched the username and password are displayed in the command line window
- This is a common security concern for many customers
- To address this concern Oracle has developed a mechanism that encrypts the password

Encryption (Continued)

- Uses Advanced Encryption Standard (AES) to encrypt your password
- The encryption process stores the password in a password file
- This password file is then referenced in the login
- Encrypting your password is a onetime process.

Encryption (Continued)

Usage: `epmautomate encrypt PASSWORD KEY PASSWORD_FILE` where:

- `PASSWORD` is the password of the Service Administrator.
- `KEY` is the private key that is to be used to encrypt the password.
- `PASSWORD_FILE` is the name and location of the file that stores the encrypted password. The password file must use the `.epw` extension.

Example: `epmautomate encrypt P@ssword1 myKey C:\mySecuredir\password.epw`

Encryption (Continued)

Using an unencrypted password:

```
epmautomate login USERNAME PASSWORD URL IDENTITYDOMAIN
```

Using an encrypted password:

```
epmautomate login USERNAME PASSWORD_FILE URL IDENTITYDOMAIN
```

DEMO

Summary

Today we learned:

- What EPM Automate is
- Why we have to use EPM Automate
- Some of the most commonly automated EPM tasks
- How to automate these tasks by creating using EPM Automate scripts

MindStream Analytics brings you...

Expert Knowledge on Oracle Planning & Budgeting Cloud Service (PBCS)

Thank you! Questions?

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