



Michigan Medicine Oracle Planning and Budgeting Cloud Service (PBCS) Quick Start Guide

Table of Contents

System Access.....	2
Setting Initial Password.....	2
Resetting Password.....	4
Connecting Microsoft Office Smart View Add-in to PBCS	7
• Private vs Shared connection.....	7
Private Connection.....	7
Smart View Settings.....	9
Updating Alias Table	9
Suppress Missing Data Options.....	12

Updated 01/18/21

System Access

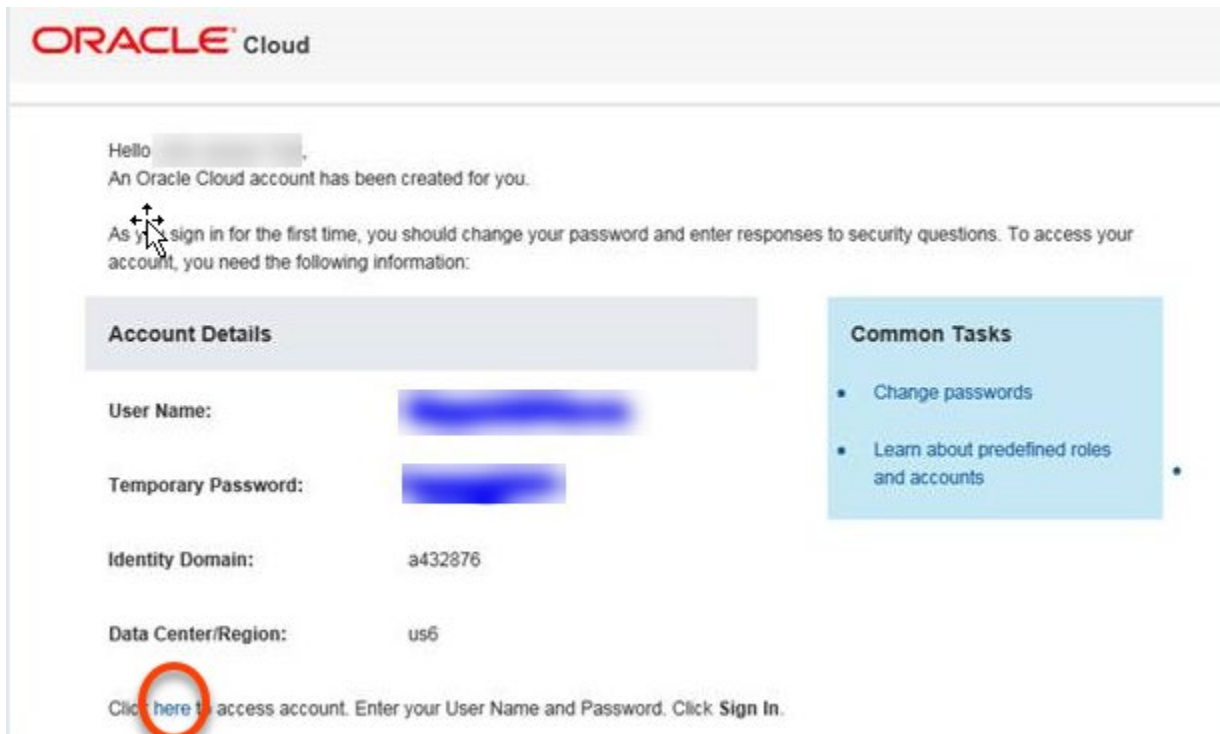
New Users

New PBCS users will need to submit an access request form.

[http://www.med.umich.edu/finance/FinancialSystems/files/pdf/UMHS Financial Systems Combined User Access Form.pdf](http://www.med.umich.edu/finance/FinancialSystems/files/pdf/UMHS_Financial_Systems_Combined_User_Access_Form.pdf)

Once we have processed your request (typically within 24 hours) you will receive an email from Oracle with your initial log-in information. An example of the email is below.

Example Oracle Account Set Up Email



Please note – PBCS passwords are maintained by Oracle. You will not be authenticating your access using your level-1 or level-2 password. If you need to change or reset your password, please follow the prompts in the PBCS application.

Setting Initial Password

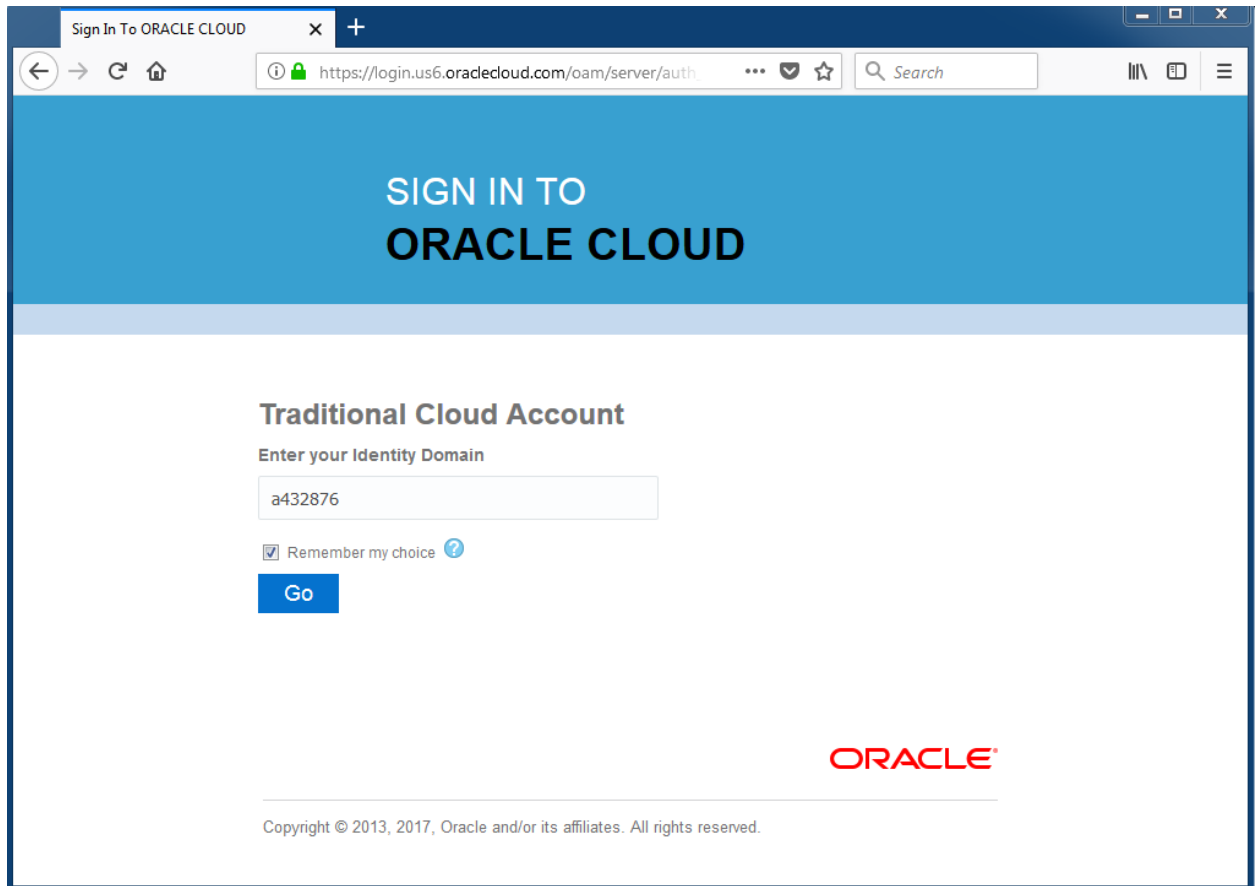
The Planning and Budgeting Cloud Service(PBCS) is accessible using the following link:

<https://planning5-a432876.pbc.us6.oraclecloud.com/HyperionPlanning>

1. Paste the link into the address bar of your browser. Mozilla Firefox or Google Chrome work best with PBCS.

Updated 01/18/21

2. Type **a432876** as the Identity Domain for Michigan Medicine. Select Remember my choice and click Go.



The screenshot shows a web browser window titled "Sign In To ORACLE CLOUD". The address bar displays the URL "https://login.us6.oraclecloud.com/oam/server/auth". The main content area features a blue header with the text "SIGN IN TO ORACLE CLOUD". Below this, the section is titled "Traditional Cloud Account" and prompts the user to "Enter your Identity Domain". A text input field contains the value "a432876". Below the input field, there is a checkbox labeled "Remember my choice" which is checked. A blue "Go" button is positioned below the checkbox. The Oracle logo is visible in the bottom right corner, and a copyright notice "Copyright © 2013, 2017, Oracle and/or its affiliates. All rights reserved." is at the bottom.

3. You will then be prompted to set up a new password and 3 security questions

The screenshot shows the Oracle Identity Self Service interface for Password Management. At the top, there is a header with the Oracle logo and the text "Identity Self Service". Below the header, the page title is "Password Management" with a user icon. The form contains three password fields: "* Old Password", "* New Password" (with an information icon), and "* Re-Type New Password". Below these is a section titled "Register challenge questions for your account" with three rows of "Question" and "Answer" fields, each with a dropdown arrow.

4. Once you complete the Password Management set up you will have access to the PBCS application

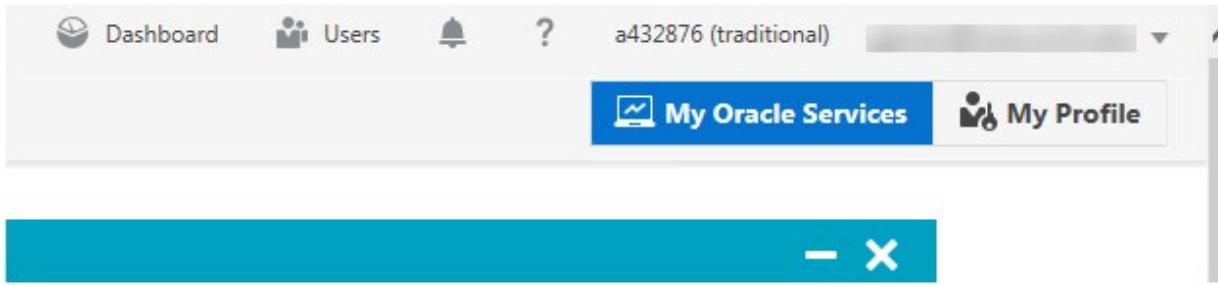


Resetting Password

If you are not currently locked out of your account, you will manage your Oracle password in the Oracle Cloud Account site.

<https://myservices.us6.oraclecloud.com/mycloud/faces/selfService.jspx>

1. Select the My Profile option near the top right of your screen.



2. Use the Change Password section to reset your password.

Change Password

Current password will expire on 18-Apr-2018 11:00 AM EDT.

* Old Password [▶ Password Policy](#)

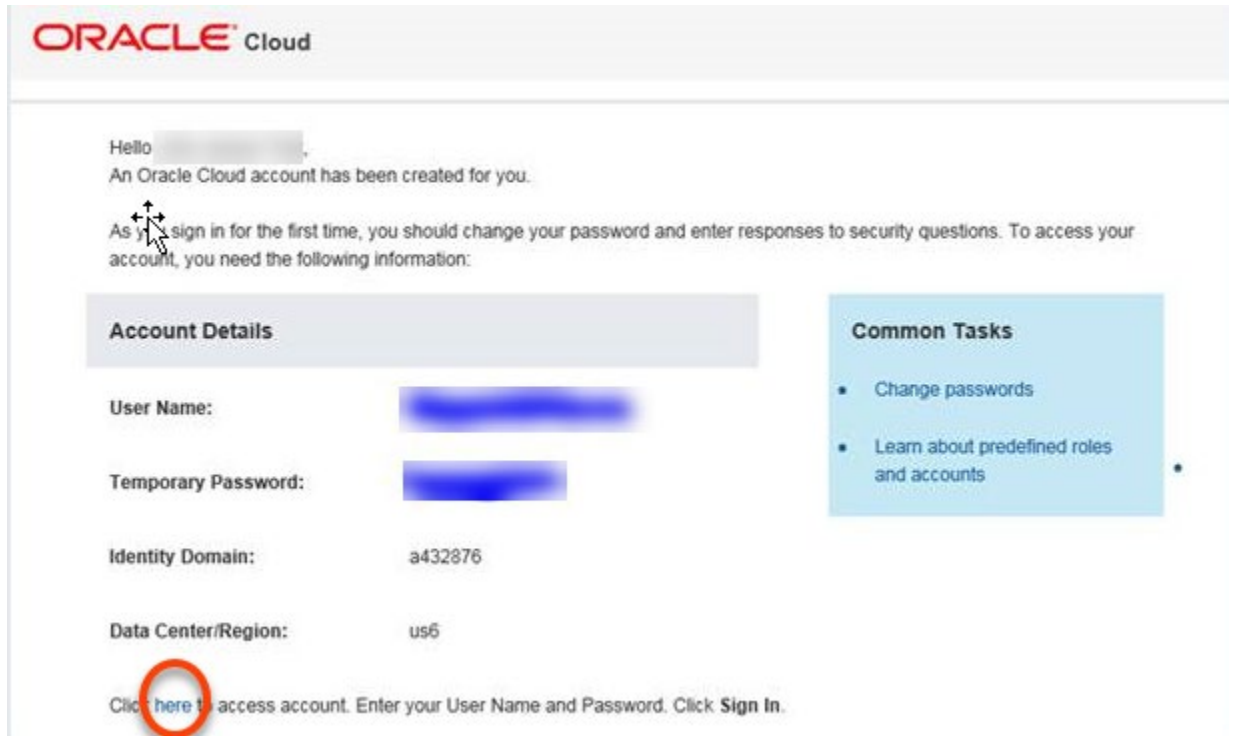
* New Password

* Confirm New Password

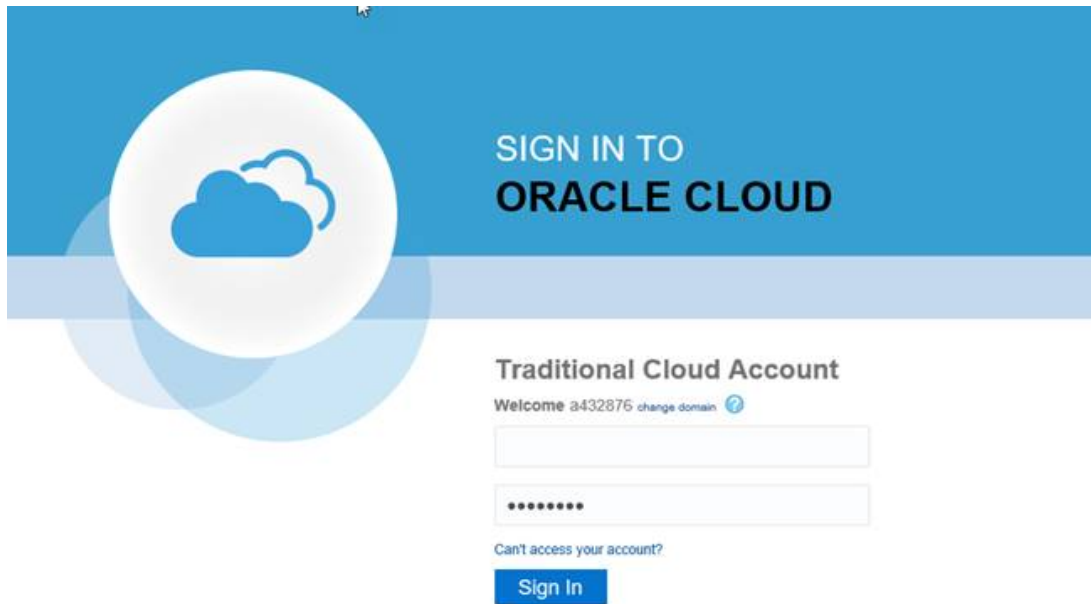
Note - You will need to reset your password every 120 days. You will receive an email notifying you when your password needs to be reset.

If you are already locked out of your account, you will need to follow these instructions.

1. Contact Financial Systems Help Desk UMHSFinancialSystems@med.umich.edu to request a password reset
2. Once the reset has been issued, the user will receive an email from Oracle



3. Click the link circled above in red
4. Enter your User name and Temporary Password shown above



5. Enter your Temporary Password along with a New Password. Click Submit.

The screenshot shows the Oracle Identity Self Service interface. At the top, there is a navigation bar with the Oracle logo, the text "Identity Self Service", and links for "Accessibility", "Help", and "Sign Out". Below the navigation bar, the main content area is titled "Password Management" with a user icon. On the right side, there is a "Submit" button and a note "* Required field". The form contains three input fields, each preceded by an asterisk: "* Old Password", "* New Password", and "* Re-Type New Password". An information icon (i) is located to the right of the "New Password" field.

6. Sign out of Cloud Services and close your browser.
7. You can now enter into the PBCS application at <https://planning5-a432876.pbc.us6.oraclecloud.com/HyperionPlanning>.

Connecting Microsoft Office Smart View Add-in to PBCS

Private vs Shared connection

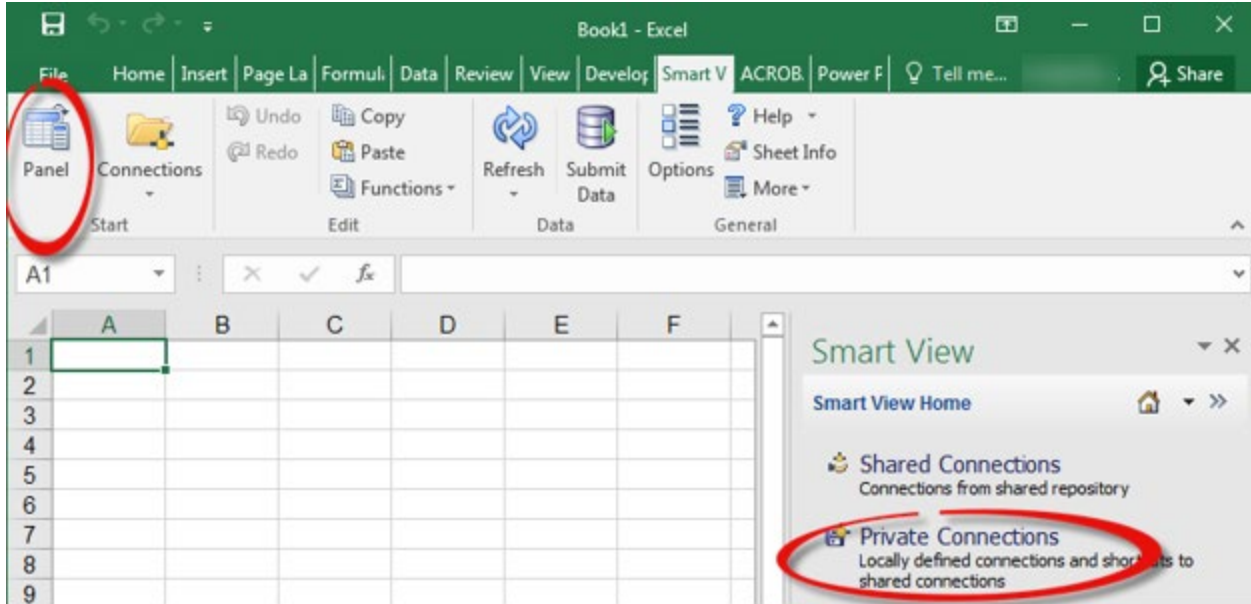
The recommended best practice for connecting Smart View to both the standard reporting cubes (ConsRpt, ProjGrt, etc.) and PBCS is to utilize both Shared and Private connections. Shared connections will be used for the standard reporting cubes and private connections will be used for PBCS.

Private Connection

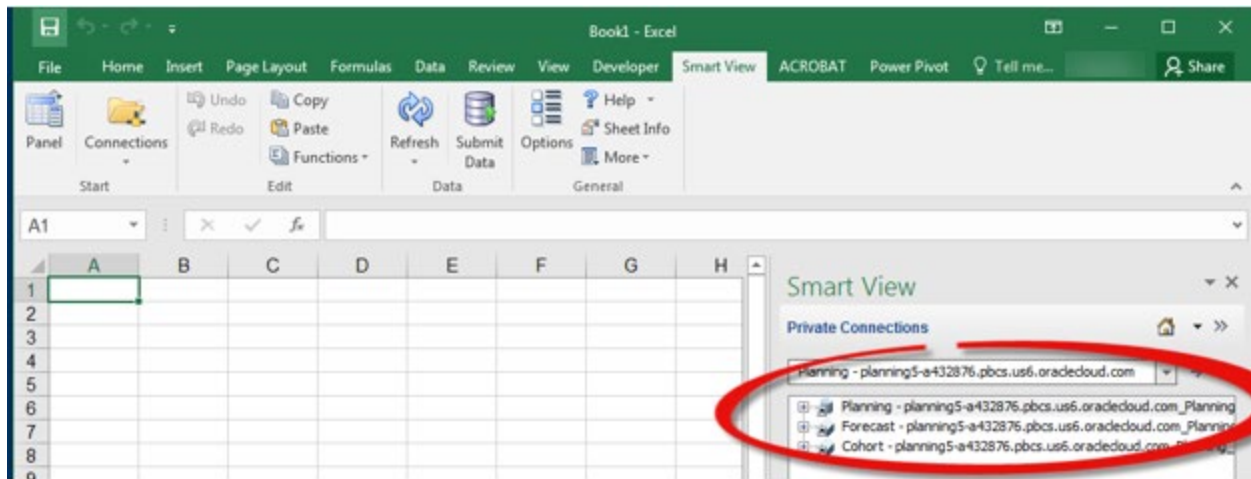
Private connections will be used to access the PBCS application.

Note - If you have an HITS Core Imaged Machine, you should already have the PBCS Private Connections installed. If you do not have private connections installed on your Machine, please refer to the Setting Up PBCS Private Connections instructions in the appendix.

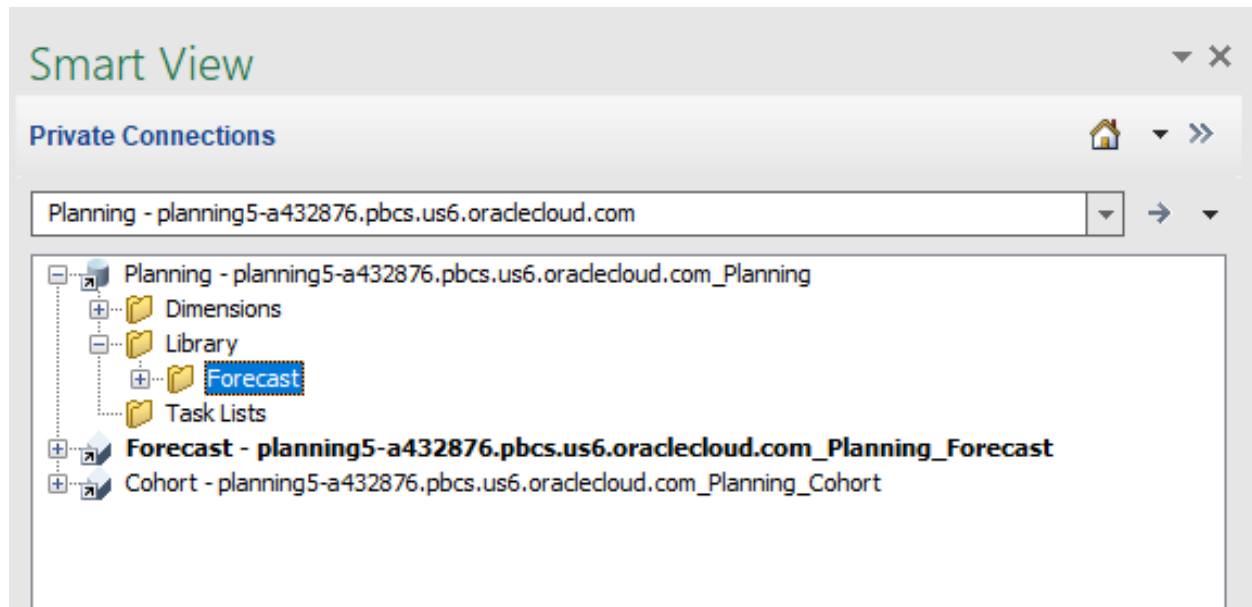
1. Select **Private Connections** within the Smart View Panel



2. You can then see the PBCS private connections



3. Select the connection needed for your query.
 - a. The Planning connection will be used to connect to the Planning forms
 - i. Expand the + icon to see the Planning form folder



- b. The Forecast connection can be used to query the Forecast cube
- c. The Cohort connection can be used to query the Cohort cube
- d. To query the Cohort or Forecast application please see the relevant sections in this document.

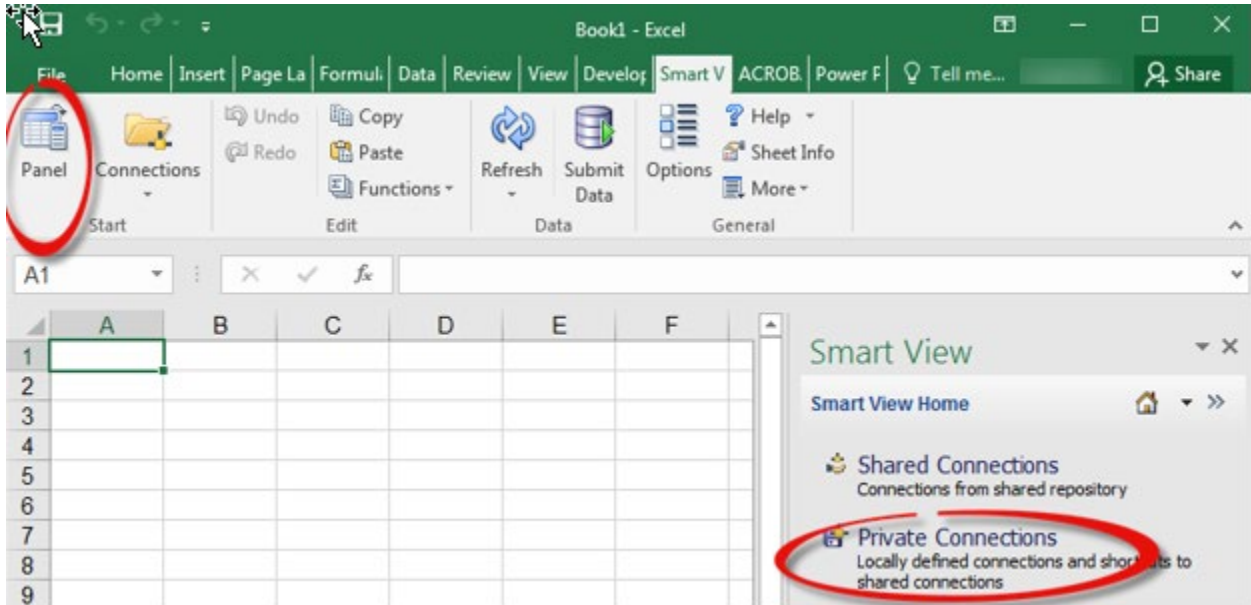
Smart View Settings

Updating Alias Table

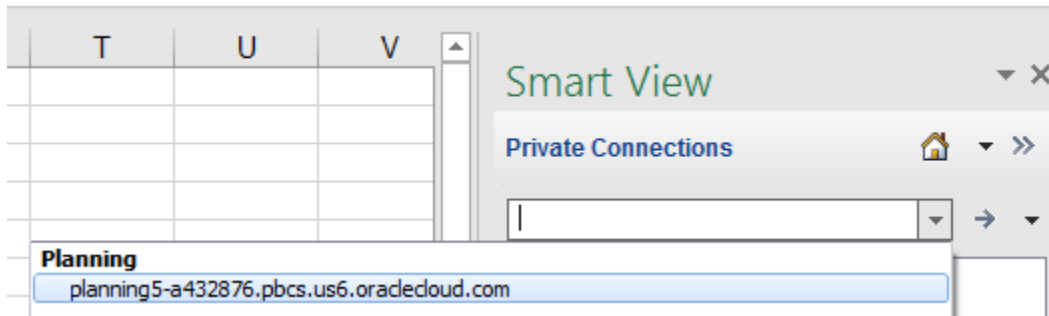
The first time you connect to the PBCS application you will need to change your Alias Table settings.

1. Open a new Excel workbook.
2. Select **Private Connections** within the Smart View Panel

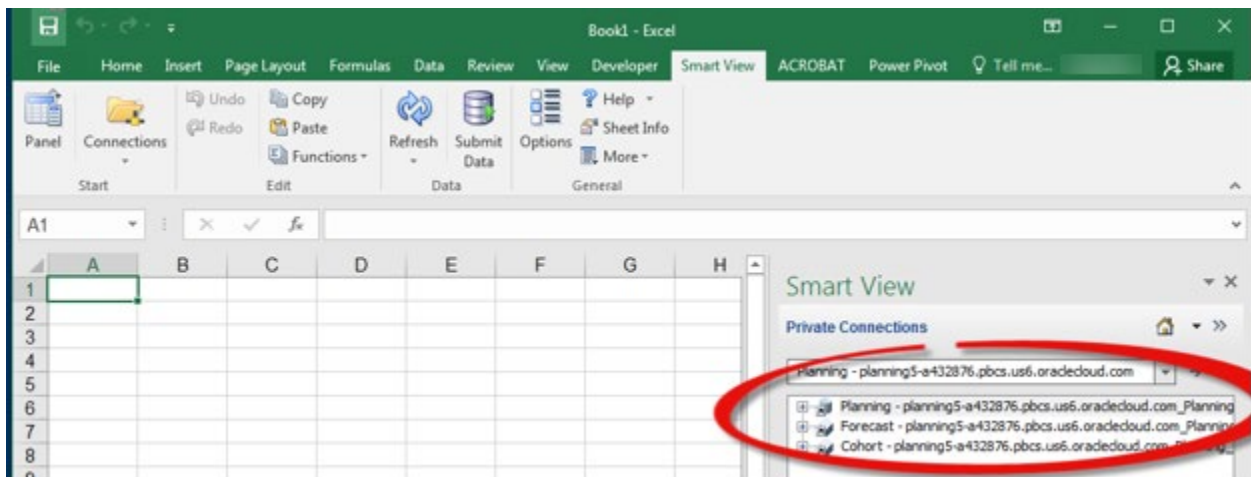
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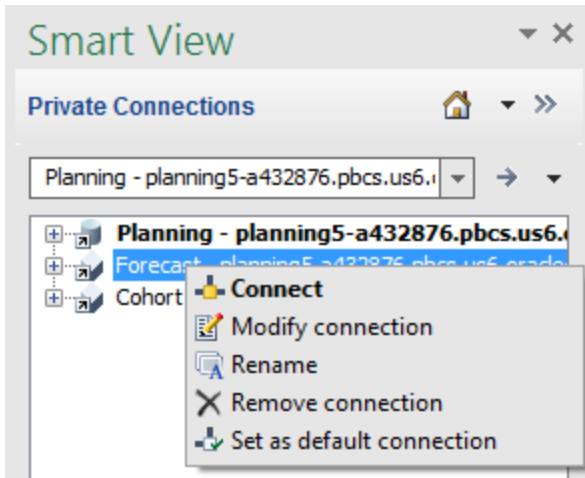
3. Select the `planning5-a432876.pbcs.us6.oraclecloud.com` connection from the dropdown



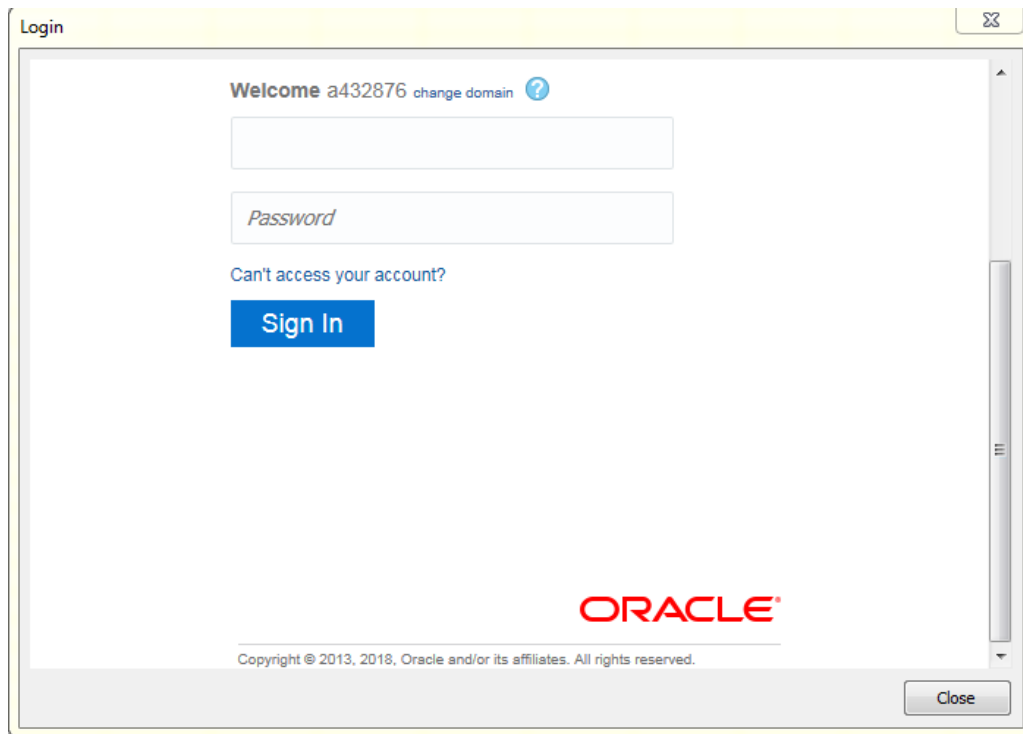
4. You will now see 3 PBCS private connections



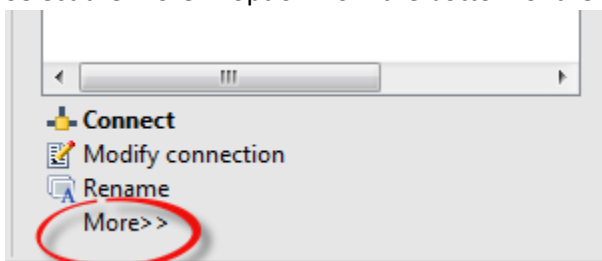
5. Right click on the Forecast application and select Connect



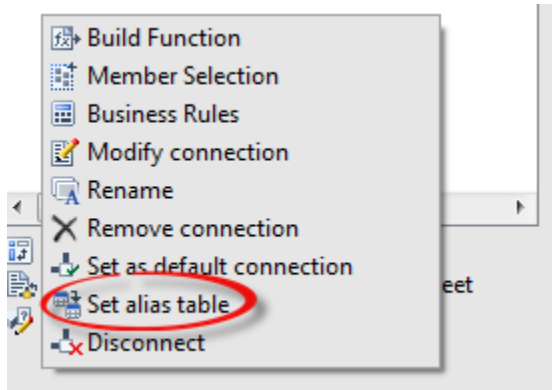
6. Enter your user name and Oracle password in the Login screen, then select Sign In



7. After you select Sign In, the Login window will close and you will be connected to the application
8. Select the More>> option from the bottom of the Smart View Panel



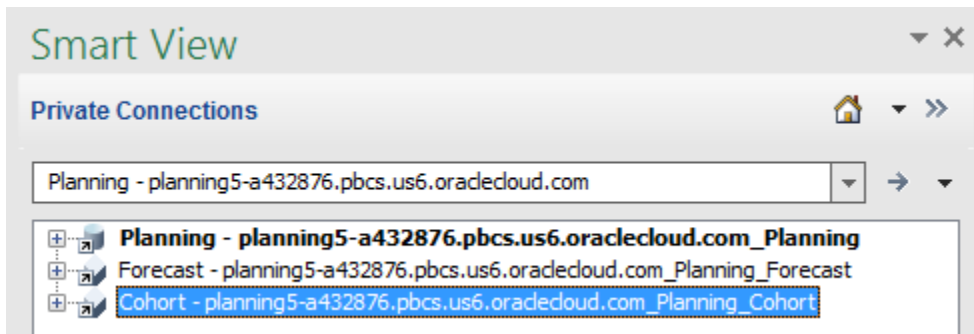
9. Select the Set alias table option



10. Select the **Default** option in the alias table window

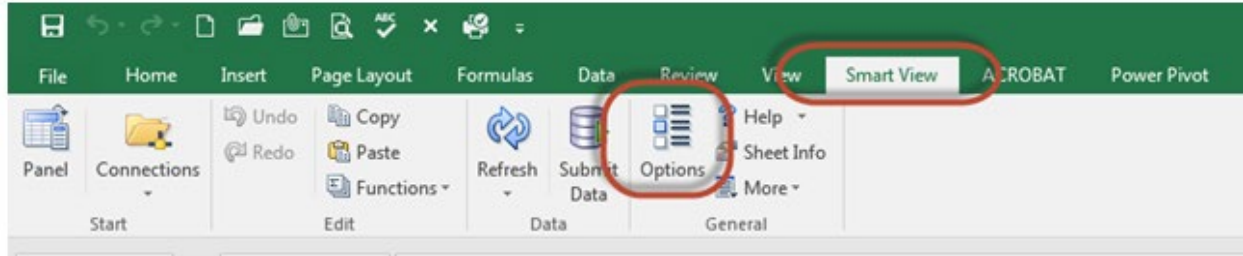


11. This action will need to be repeated for the Cohort application.

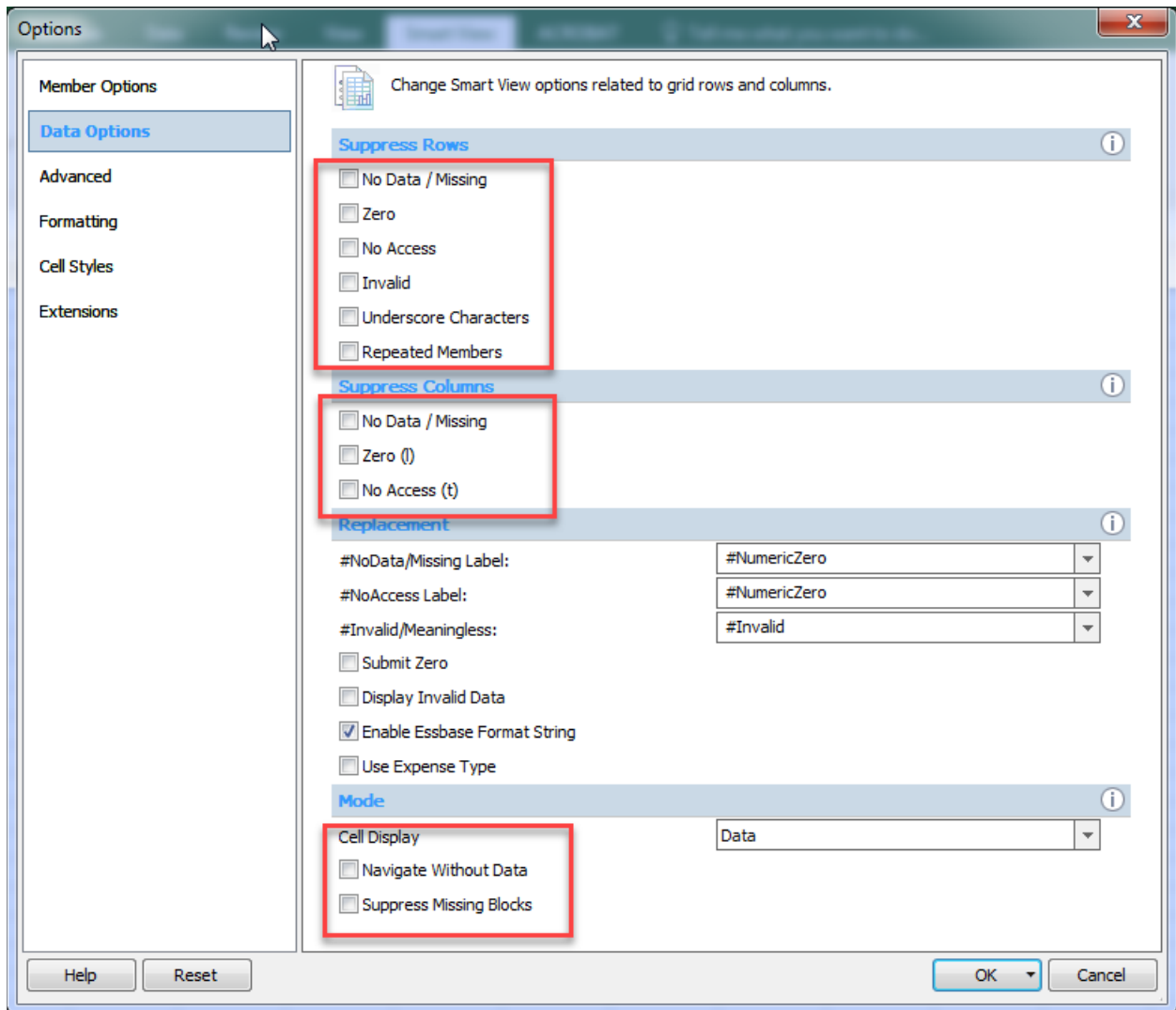


Suppress Missing Data Options

1. Open Excel and select the Smart View ribbon.
2. Select Options



3. Select Data Options section along the left side of the Options window
4. Uncheck all boxes in the Suppress Rows and Columns section
5. Uncheck "Suppress Missing Blocks" which is near the bottom of the Options Window.



6. Click on the down arrow next to "Ok"
7. Select "Save as Default Options"

Select "Save as Default Options"

Click on the down arrow next to "OK"

Options

Change Smart View options related to grid rows and columns.

Member Options

- Data Options**
- Advanced
- Formatting
- Cell Styles
- Extensions

Suppress Rows

- No Data / Missing
- Zero
- No Access
- Invalid
- Underscore Characters
- Repeated Members

Suppress Columns

- No Data / Missing
- Zero (!)
- No Access (t)

Replacement

#NoData/Missing Label:	#Missing
#NoAccess Label:	#No Access
#Invalid, Meaningless:	#NumericZero

- Submit Zero
- Display Invalid Data
- Enable Essbase Format String
- Use Expense Type

Mode

Cell Display: Data

- Navigate Without Data

Help Reset OK Cancel

Save as Default Options
Apply to All Sheets