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

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System Access

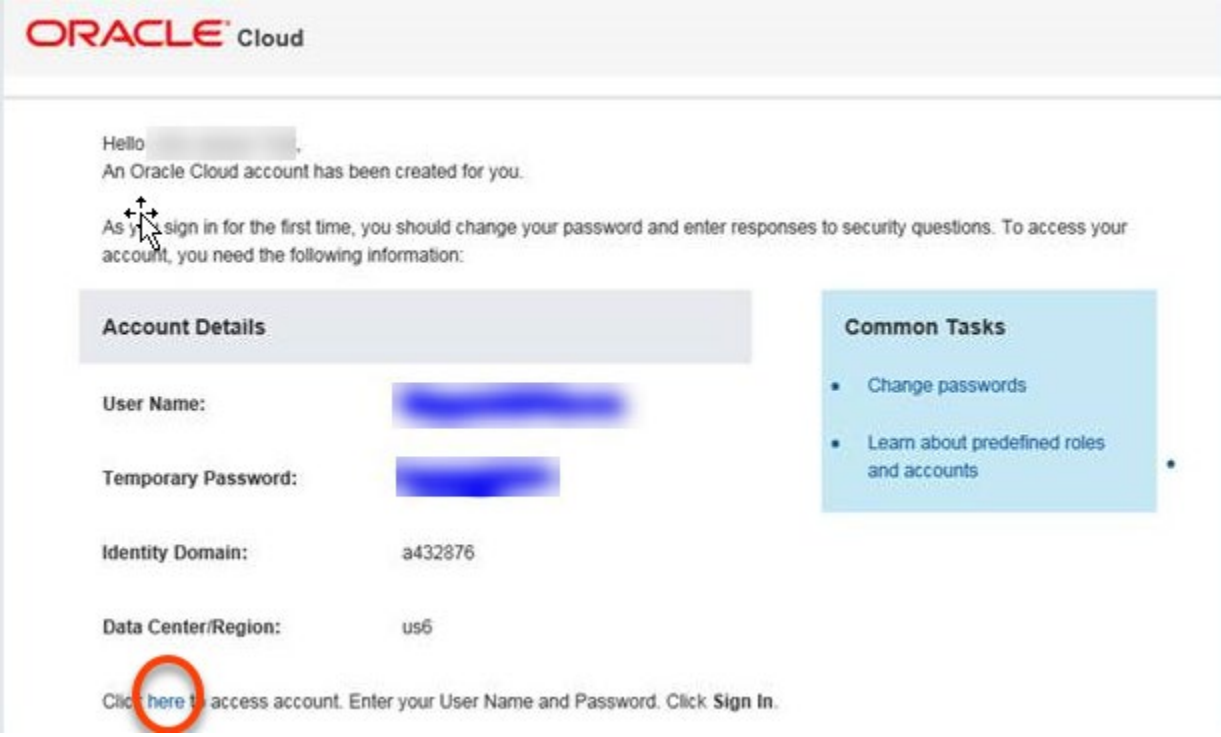
New Users

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

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.

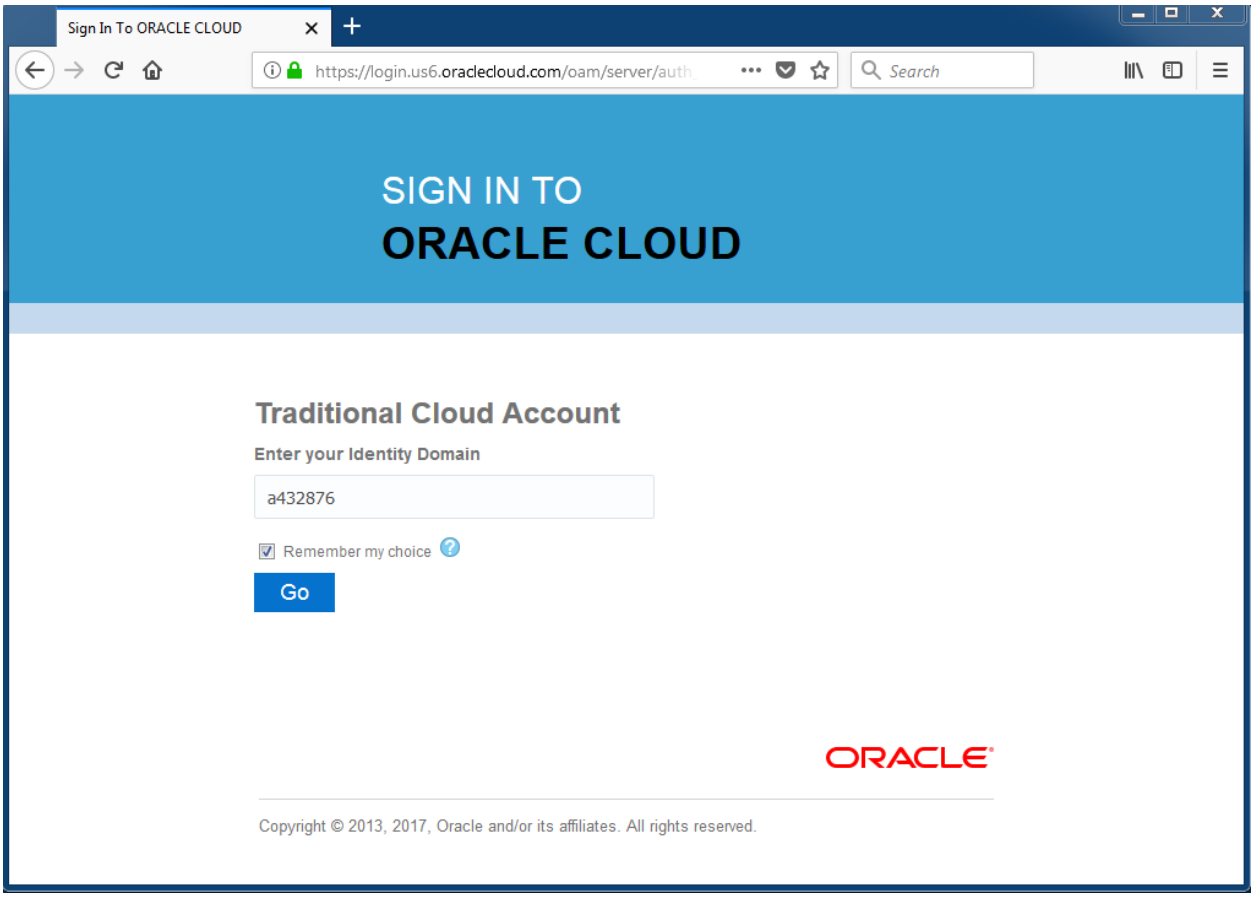
Setting Initial Password

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

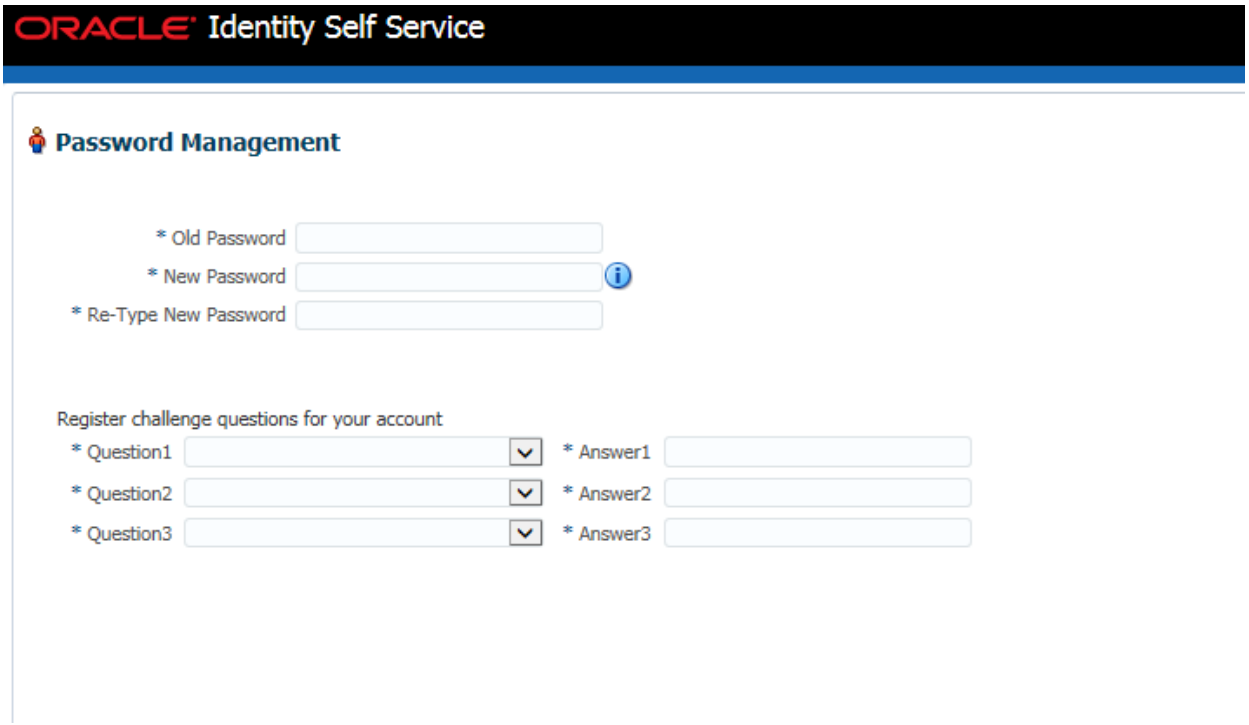
https://planning5-a432876.pbcs.us6.oraclecloud.com/HyperionPlanning

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

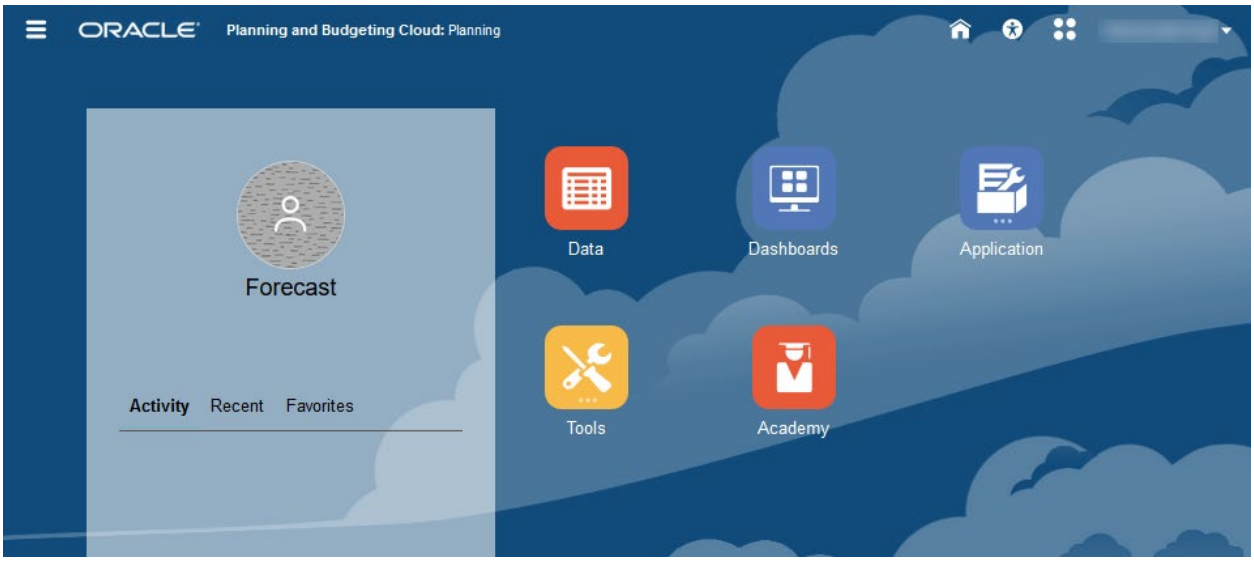
2. Type **a432876** as the Identity Domain for Michigan Medicine. Select Remember my choice and click Go.



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



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

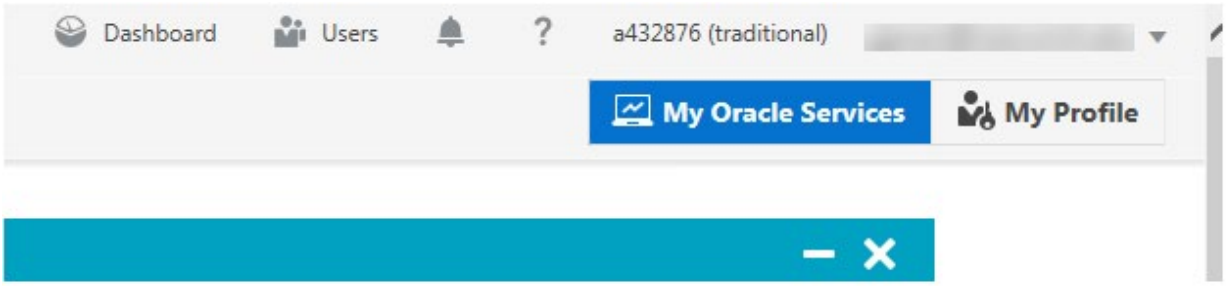


Resetting Password

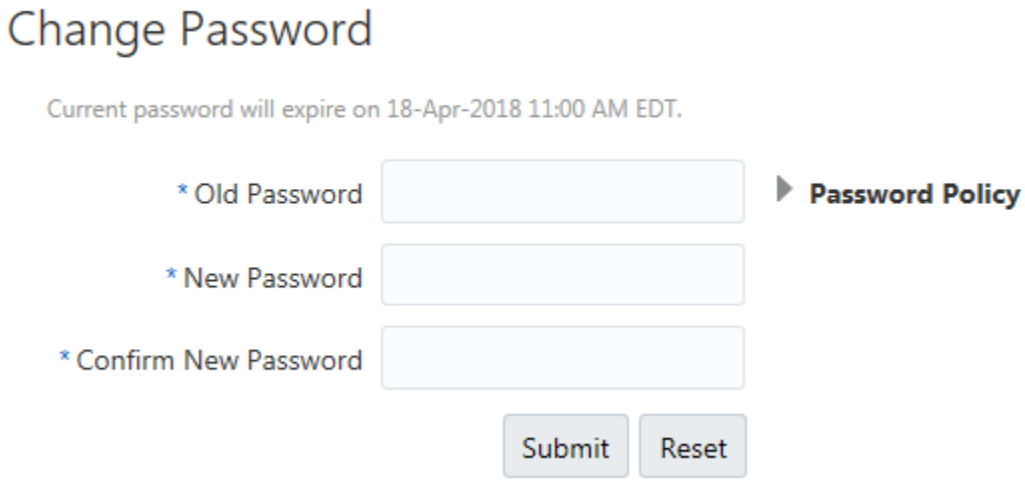
If you are not currently locked out of your account, you will manage your Oracle password in the Oracle Cloud Account site.

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

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



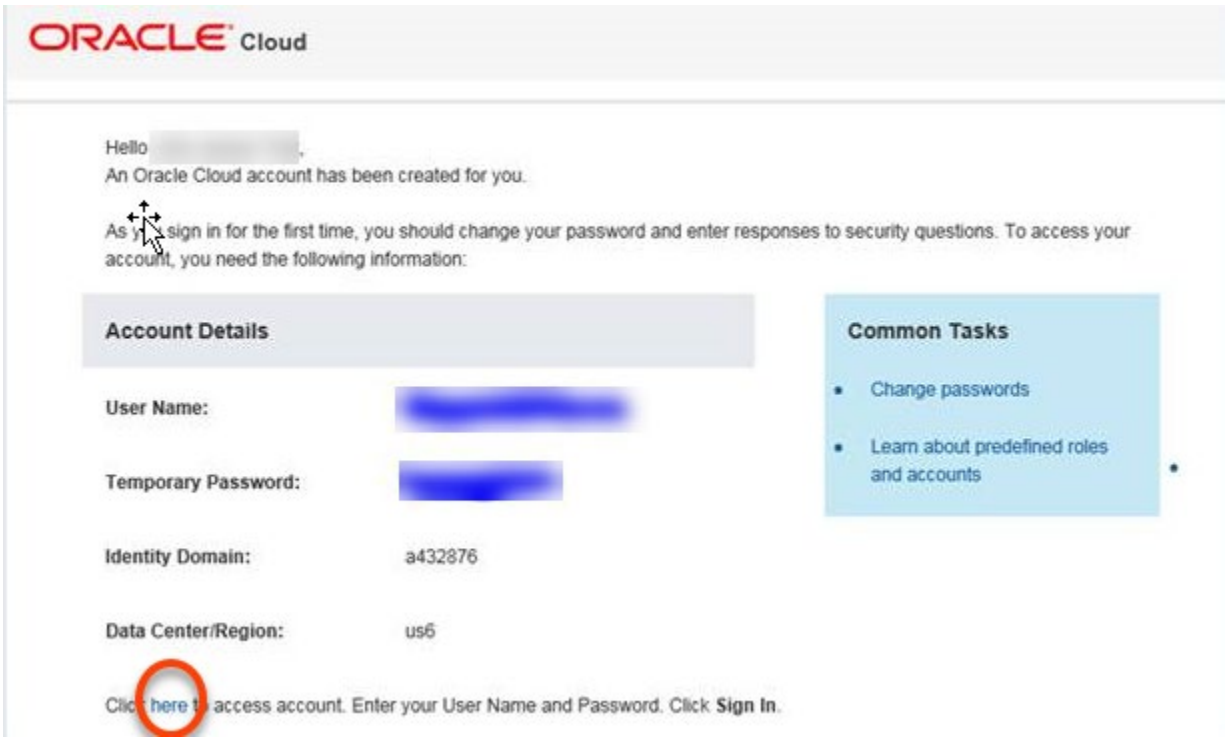
2. Use the Change Password section to reset your password.



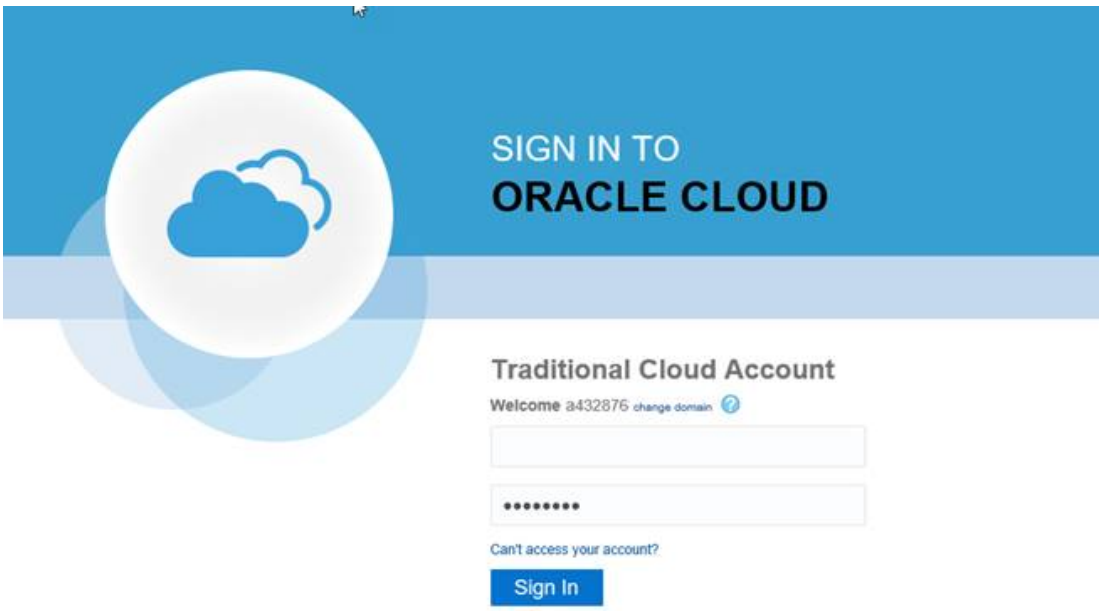
Note - You will need to reset your password every 120 days. You will receive an email notifying you when your password needs to be reset.

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

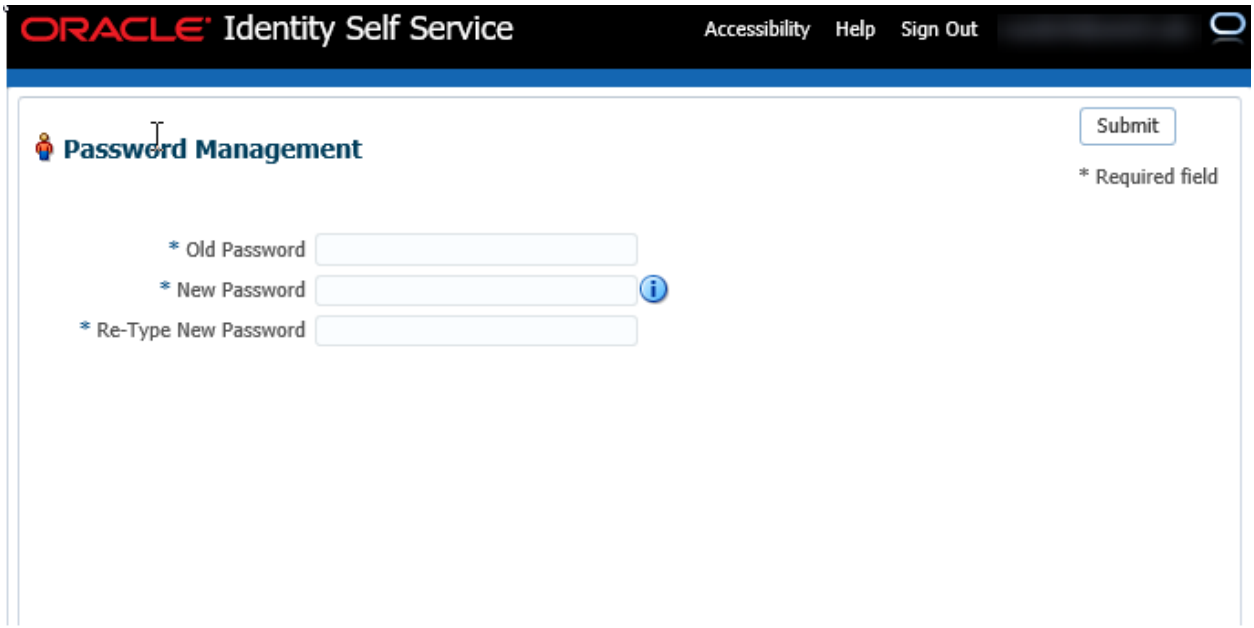
1. Contact Financial Systems Help Desk UMHSFinancialSystems@med.umich.edu to request a password reset
2. Once the reset has been issued, the user will receive an email from Oracle



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.



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

Connecting Microsoft Office Smart View Add-in to PBCS

Private vs Shared connection

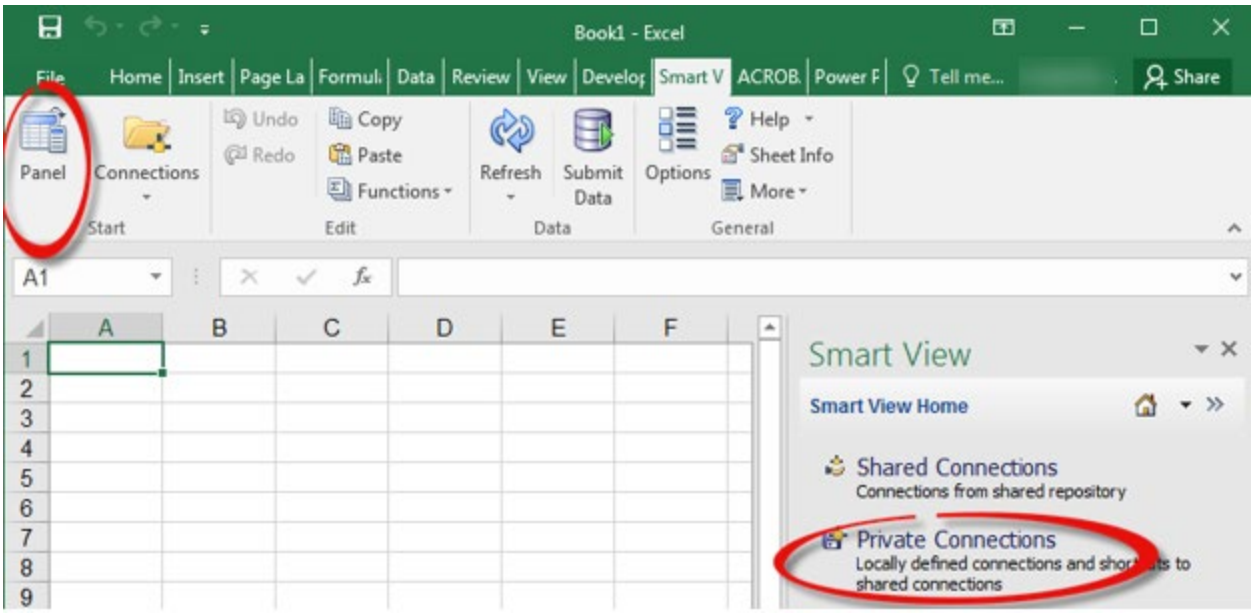
The recommended best practice for connecting Smart View to both the standard reporting cubes (ConsRpt, ProjGrt, etc.) and PBCS is to utilize both Shared and Private connections. Shared connections will be used for the standard reporting cubes and private connections will be used for PBCS.

Private Connection

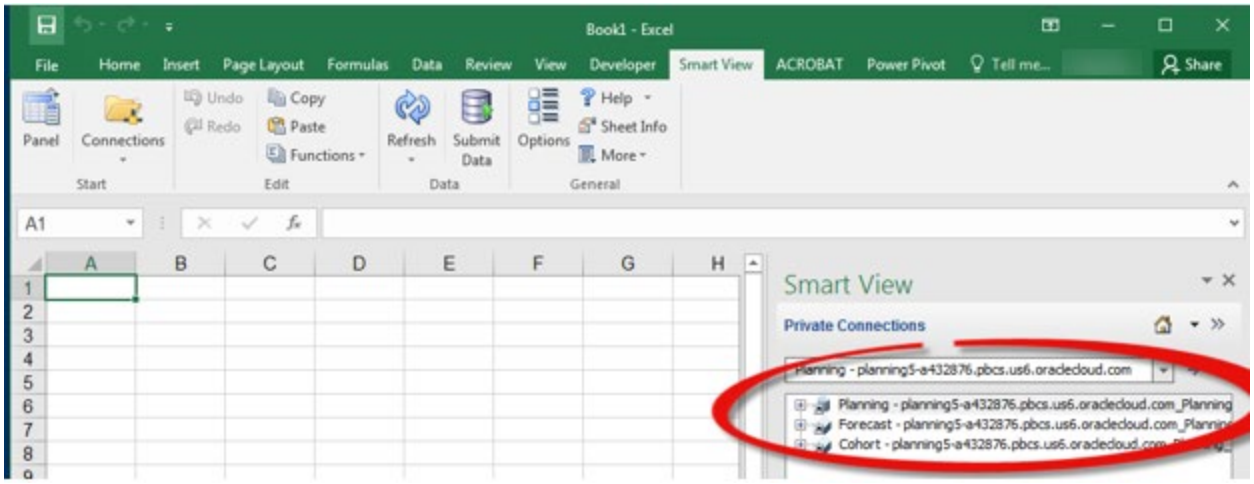
Private connections will be used to access the PBCS application.

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.

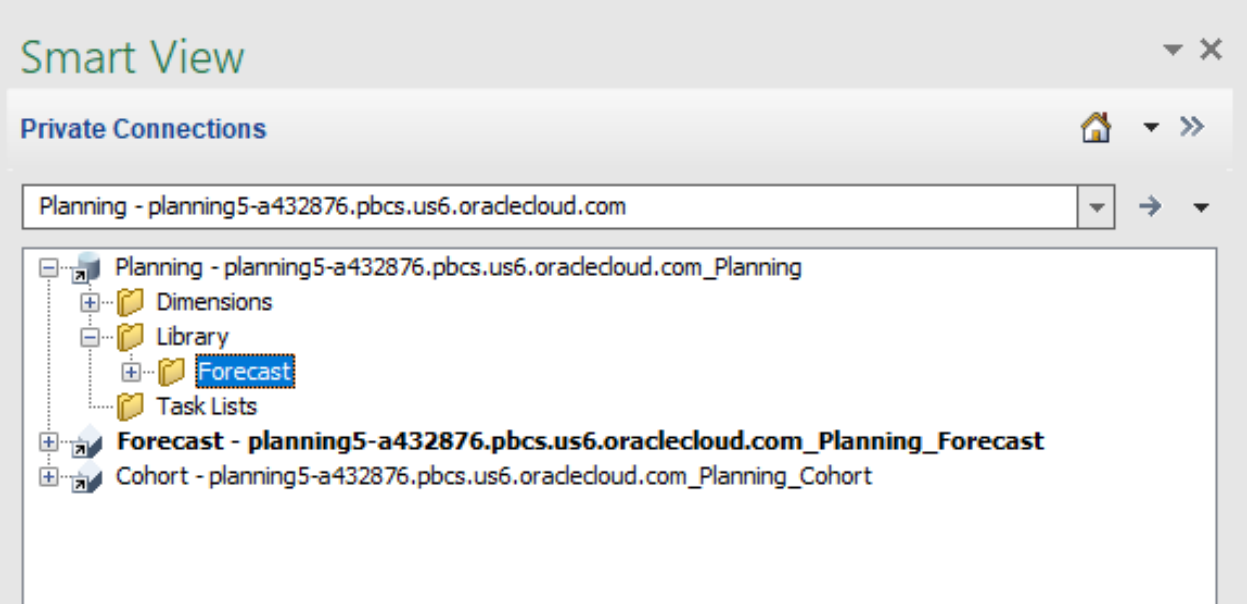
1. Select **Private Connections** within the Smart View Panel



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



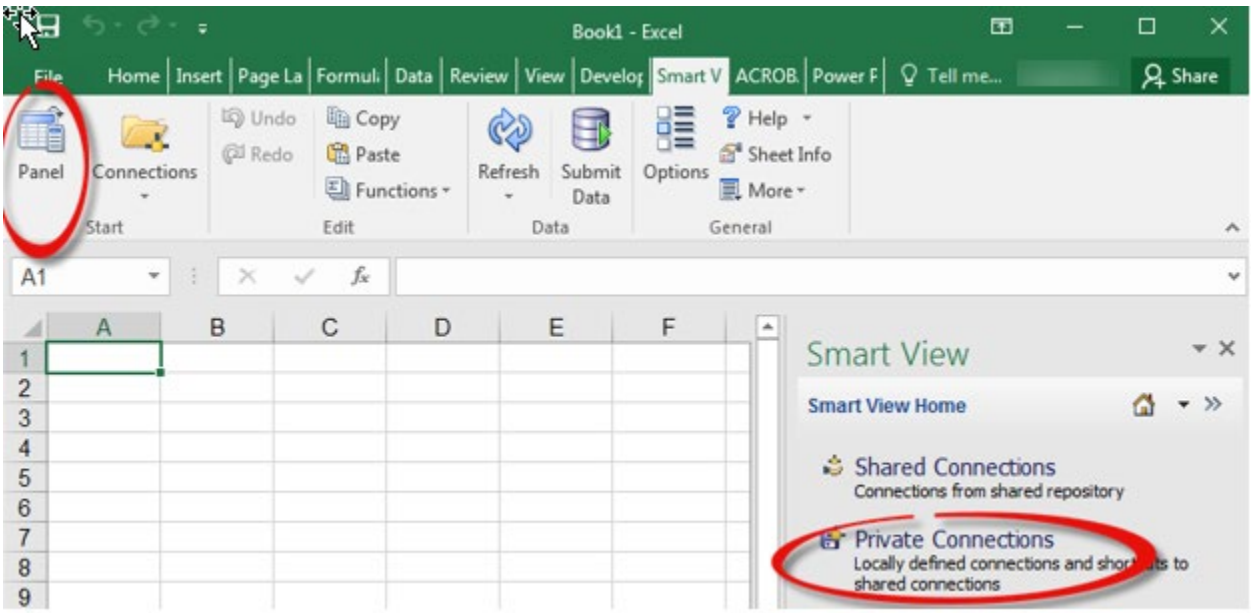
b. The Forecast connection can be used to query the Forecast cube
c. The Cohort connection can be used to query the Cohort cube
d. To query the Cohort or Forecast application please see the relevant sections in this document.

Smart View Settings

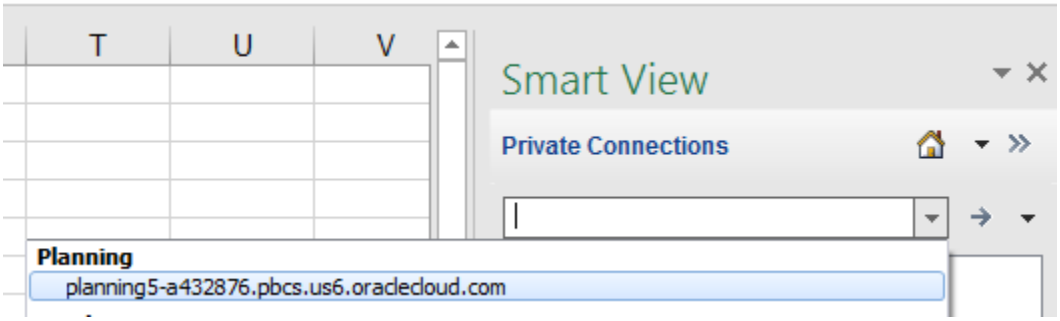
Updating Alias Table

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

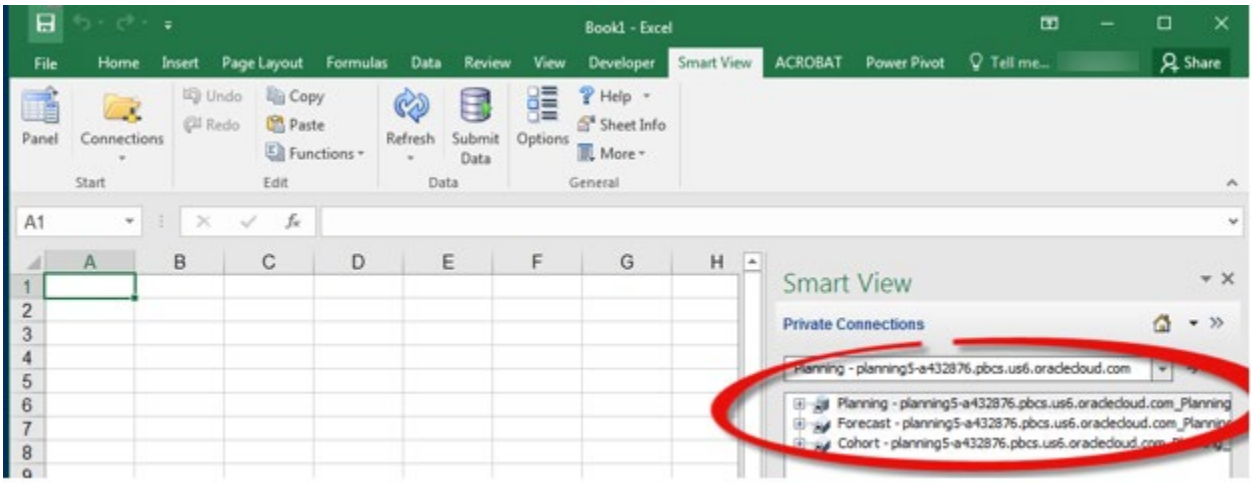
1. Open a new Excel workbook.
2. Select **Private Connections** within the Smart View Panel



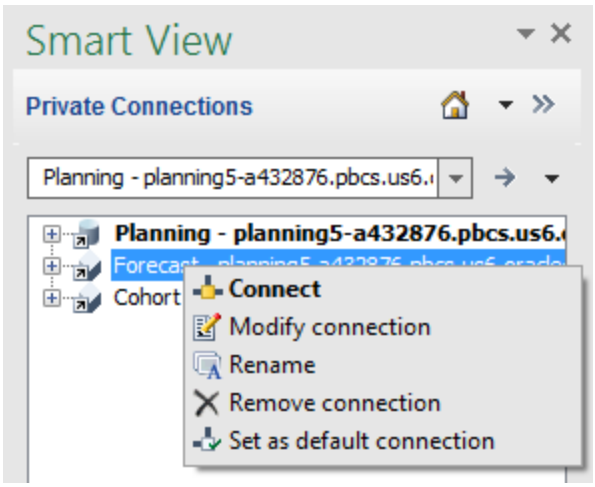
3. Select the planning5-a432876.pbcs.us6.oraclecloud.com connection from the dropdown



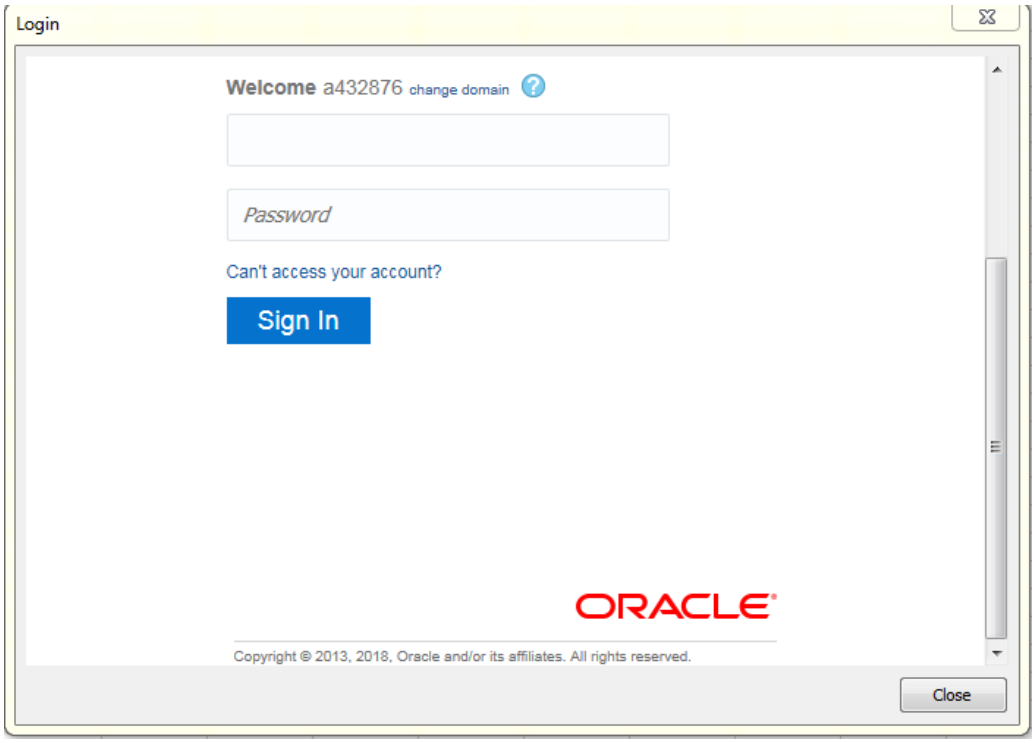
4. You will now see 3 PBCS private connections



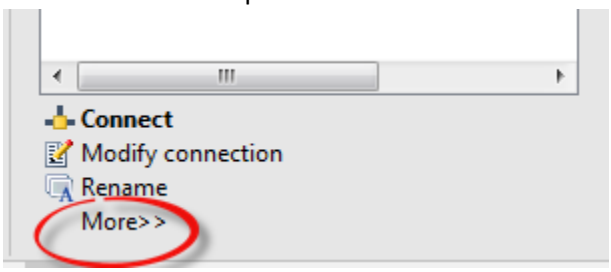
5. Right click on the Forecast application and select Connect



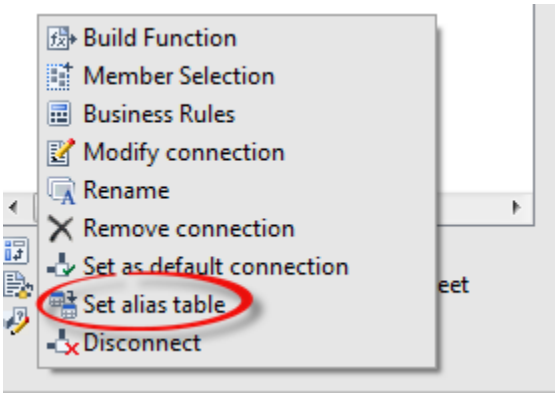
6. Enter your user name and Oracle password in the Login screen, then select Sign In



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

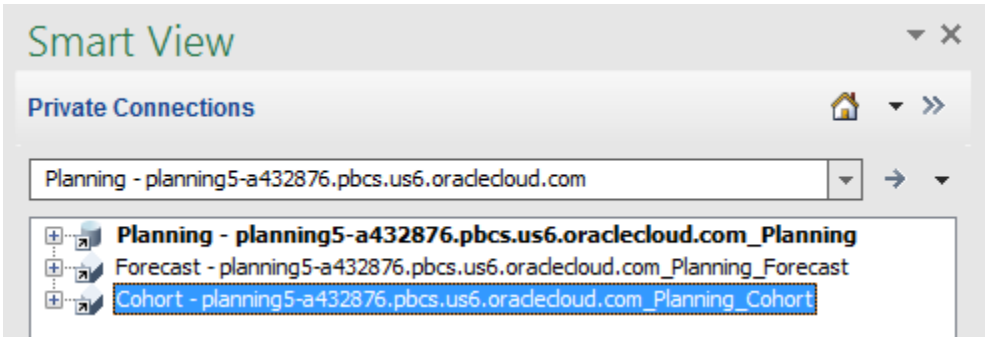


9. Select the Set alias table option



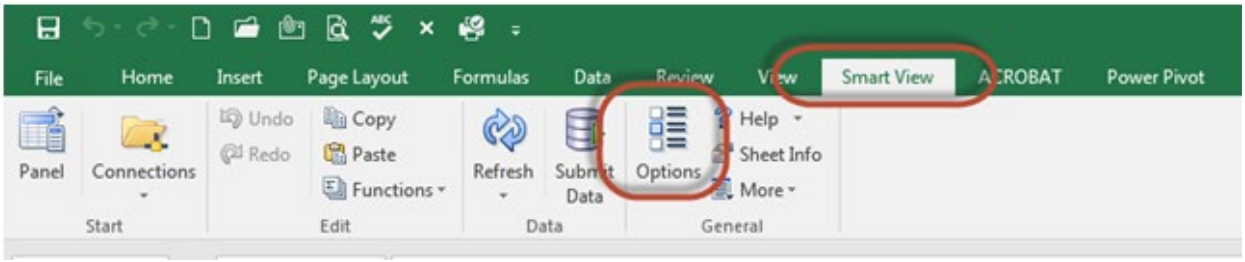
10. Select the **Default** option in the alias table window

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

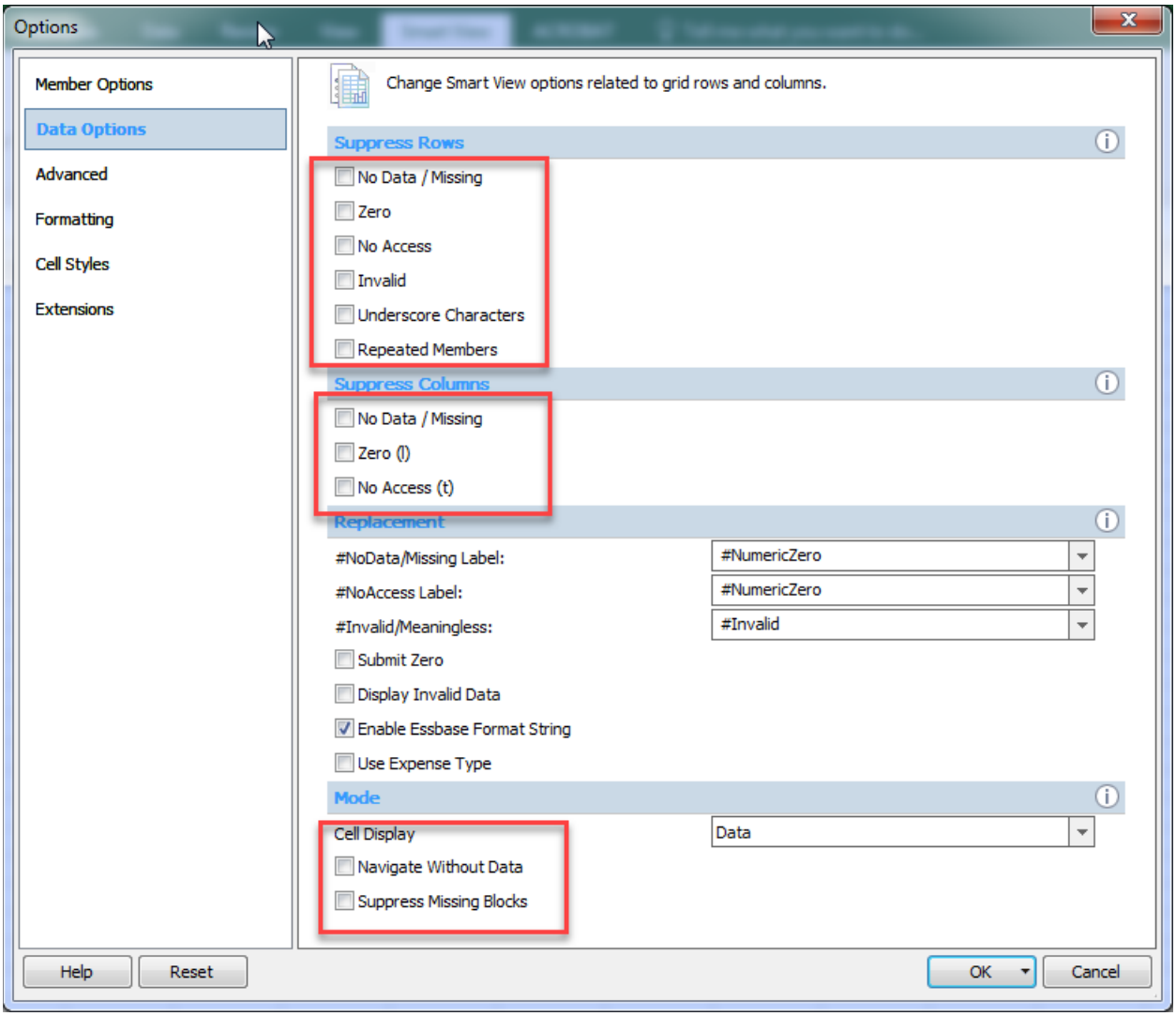


Suppress Missing Data Options

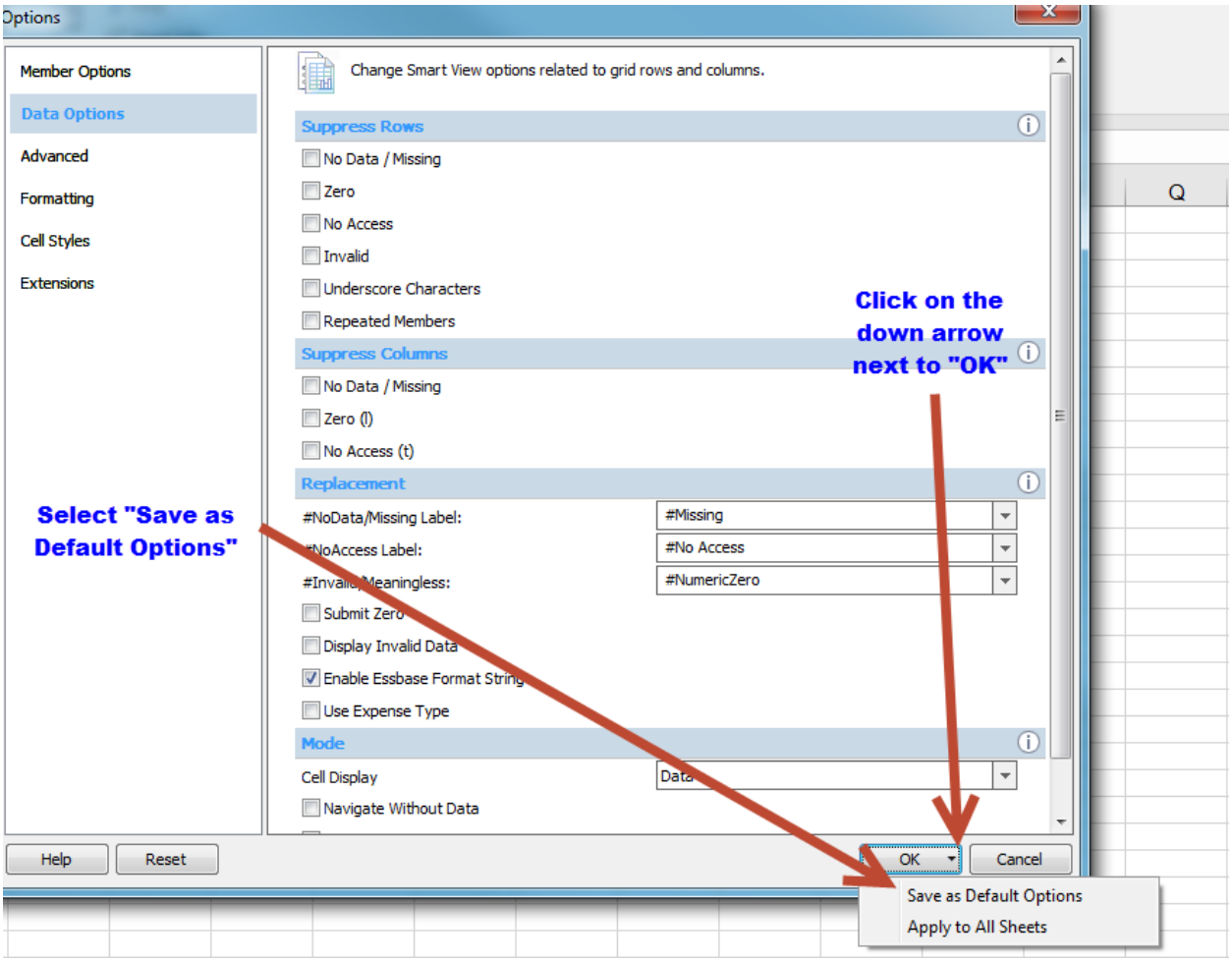
1. Open Excel and select the Smart View ribbon.
2. Select Options



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”


Options
Member Options
Data Options
Advanced
Formatting
Cell Styles
Extensions
Change Smart View options related to grid rows and columns.
Suppress Rows
No Data / Missing
Zero
No Access
Invalid
Underscore Characters
Repeated Members
Suppress Columns
No Data / Missing
Zero (l)
No Access (t)
Replacement
#NoData/Missing Label:
#Missing
#NoAccess Label:
#No Access
#NumericZero
Submit Zero
Display Invalid Data
Enable Essbase Format String
Use Expense Type
Mode
Cell Display
Navigate Without Data
Help
Reset
OK
Cancel
Save as Default Options
Apply to All Sheets
Click on the down arrow next to "OK"
Select "Save as Default Options"