



Unlocking Intelligence: Exploring AI Capabilities in Oracle EPM

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Rajeevan Dhanaraj

Oracle EPM Solutions Practice Leader | Finance Transformation Strategist | Data Insights Expert

Mr. Rajeevan Dhanaraj serves as the Oracle EPM Solutions Lead at SmartERP Solutions, overseeing both on-premise and cloud-based implementations. With over 21 years of experience in OLAP and Data Insights projects, he brings a rare blend of technical mastery, strategic vision, and interpersonal finesse to every engagement. Throughout his career, Rajeevan has successfully delivered 34 full-cycle Oracle EPM implementations both Cloud and on-Prem. His work spans industries from banking and insurance to manufacturing, oil & gas, retail, and public sector, making him a versatile and trusted advisor in enterprise performance management. Rajeevan has collaborated closely with CFOs and VPs to drive finance transformation initiatives and master data management strategies. Rajeevan is known for identifying gaps in existing systems and crafting integrated roadmaps that elevate enterprise performance.

Unlocking Intelligence: Exploring AI Capabilities in Oracle EPM

In today's fast-paced financial landscape, agility and insight are no longer optional—they're essential. Today we'll dive deep into the transformative power of Artificial Intelligence within Oracle Enterprise Performance Management (EPM). Discover how Oracle's AI-driven features are reshaping financial planning, forecasting, and reconciliation by automating routine tasks, detecting anomalies, and delivering predictive insights with unprecedented accuracy.

Today's session will explore:

-  Embedded AI and machine learning in Oracle EPM Cloud
-  Predictive planning and scenario modelling for smarter decision-making
-  Intelligent transaction matching and anomaly detection
-  Automation of repetitive financial processes to boost efficiency
-  Real-world use cases and success stories from leading organizations

Whether you're a finance leader, EPM architect, or data enthusiast, I will equip you with the knowledge to harness Oracle EPM's AI capabilities and drive strategic value across your enterprise.



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Agenda



Planning - Predictive Planning

Planning & TRCS – IPM Insights

Planning-Detailed Report for Auto Predict

Planning - Predictive Cash Forecasting

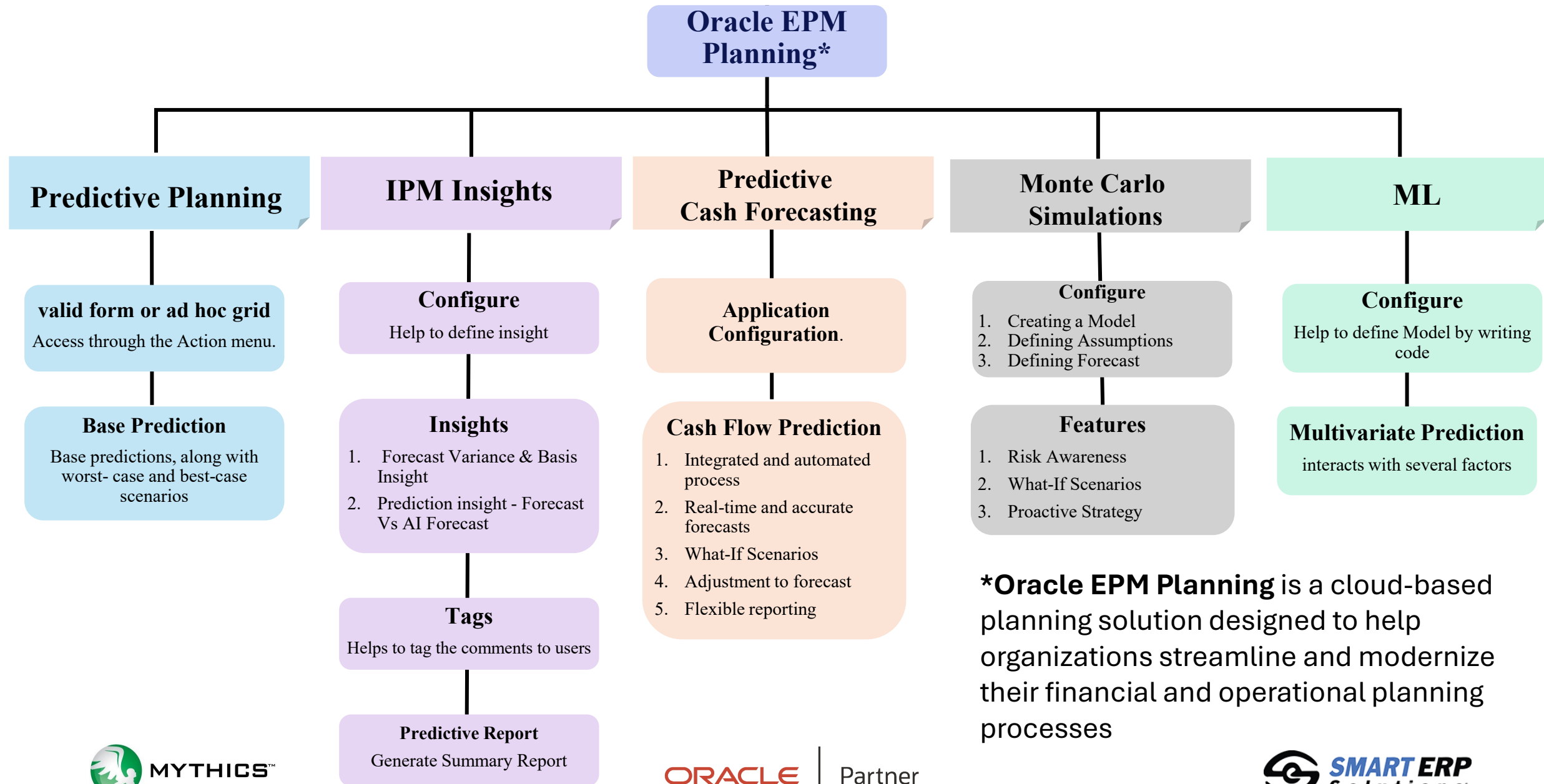
Planning – Monte Carlo Simulations

Planning –Bring Your Own ML

PCM - PCM Agent

Narrative Reporting-Generative AI in Reporting

Oracle EPM Planning - AI Features



***Oracle EPM Planning** is a cloud-based planning solution designed to help organizations streamline and modernize their financial and operational planning processes

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Oracle EPM Planning - Predictive Planning

- ☐ Predictive Planning is a built-in feature in Oracle EPBCS (Enterprise Planning and Budgeting Cloud Service) that leverages statistical models to forecast future business performance based on historical data.
- ☐ Predictive Planning provides a statistically-robust method for helping planners create and validate their forecasts.
- ☐ Predictive Planning uses time-series forecasting techniques to create new predictions or validate existing forecasts that were entered into Planning using other forecasting methods.
- ☐ Predictive Planning creates base predictions, along with worst- case and best-case scenarios to provide range estimates.

To predict future values:

- ☐ In valid form or ad hoc grid, select Predictive Planning from the Actions menu.
- ☐ Predictive Planning accesses historical data for the members on the form, analyzes the data for trends and seasonal variations, and then predicts future values based on this information.
- ☐ A results area opens below the form with a chart that displays historical data, forecasts, and predictions, along with detailed information about the prediction.
- ☐ Use the results to compare the predicted values to your forecasted values for each member.

What is your organization's approach to forecasting accuracy improvement?

- A. We do not focus on forecasting accuracy
- B. ERP-based forecasting
- C. Manual adjustments based on historical trends
- D. AI-driven predictive modeling



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Oracle EPM Planning & TRCS – IPM Insights

- ❑ IPM - Integrated directly in your applications to inform your planning decisions with predictive capabilities and accelerate insight discovery with financial pattern recognition.
- ❑ IPM Insights analyzes past data and predicted data, helping you to find patterns and insights into data that you might not have found on your own.
- ❑ Insights can be trends, anomalies, forecast bias, or variations. With IPM Insights, the insight discovery phase of the planning process is automated with data science and financial pattern recognition, enhancing your forecast effectiveness.
- ❑ Using IPM Insights, can analyze and explore data across any account. IPM Insights automates processing large amounts of multidimensional data, so that as new actuals come into the system, quickly detect patterns in your data or hidden correlations, streamlining reporting, improving your forecasting, and strengthening your decision making.
- ❑ You spend less time in analysis, saving time in the overall planning process.

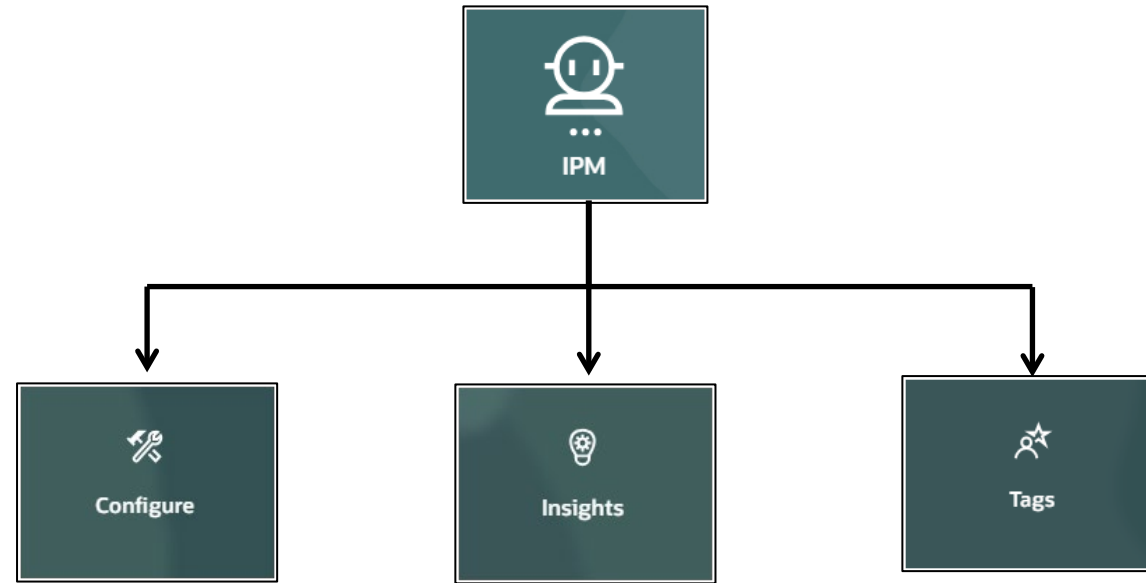


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Oracle EPM Planning & TRCS– IPM Insights

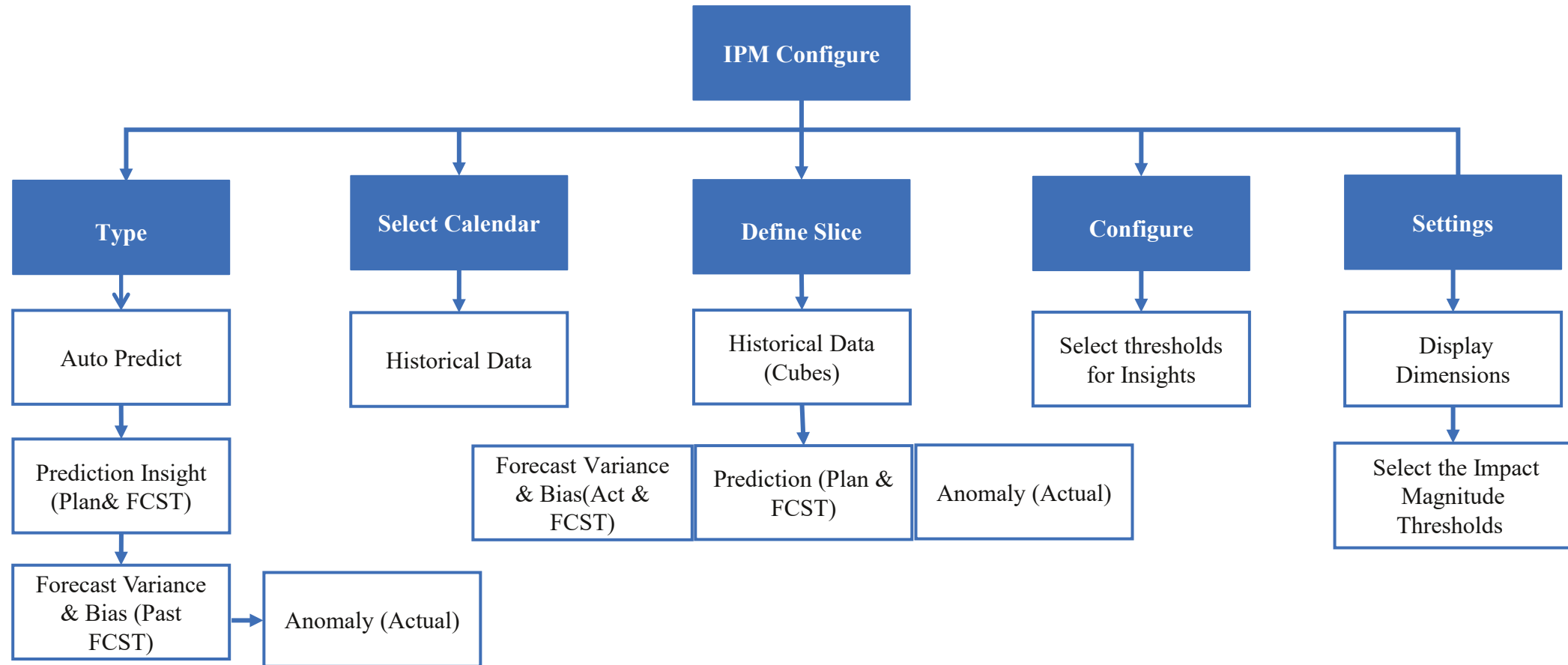


- ❑ **Configure** – For administrators to setup new insight functionality
- ❑ **Insights** – The dashboard which will display configured insights for planners
- ❑ **Tags** - We can collaborate with our colleagues more effectively and leverage the power of automated analysis with IPM Insights using tags.

Note: IPM Insights works only with applications with **Hybrid** Essbase enabled.

Oracle EPM Planning & TRCS – IPM Insights

IPM Configuration Flow Diagram



Oracle EPM Planning – IPM Insights (Configuration Types)

- ❑ **Auto predict** – Automatically predicts future periods based on historical data in the system. Which we are providing the data slice.

Note: This is automatically selected if no user prediction data is available.

- ❑ **Forecast variance & bias insights** – Reveals potential hidden bias in forecasts submitted by planners by analysing past data.

Ex: Current year FY25, it will be analysing FY24, FY23 forecast data

- ❑ **Prediction insights** – Analyses variances between predicted scenarios such as forecasts and computer-generated projections.

Ex: Current year FY24, it will be analysing FY25 data for plan and forecast

Note: Selecting “No” for available prediction data will turn on auto-predict.

- ❑ **Anomaly insights** – Identifies inconsistency in historical actuals by highlighting outlier values.

Ex: Current year FY24, it will be analysing FY23 data for Actual

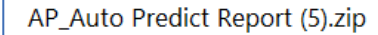
Detailed Reports for Auto Predict Predictions

❑ A comprehensive prediction report can be generated, providing details such as status, accuracy, forecasting method, seasonality, adjusted outliers, error metrics, and additional statistical insights.

The screenshot displays the Oracle Auto Predict web interface. At the top, a navigation bar includes 'Insights', 'Configure' (highlighted with a red box), 'ML Models', and 'Tags'. Below this, the 'IPM' section shows a search bar and filter buttons for 'Job Type Auto Predict', 'Source Cube HistPlan', 'Target Cube HistPlan', 'Status Completed', and 'Modified 2025-06-12 - 2025-06-19'. A table lists 9 results, with two rows visible. The first row is 'AUTO PREDICT - SUB VARIABLE' and the second is 'Auto Predict Report' (highlighted with a red box). A context menu is open for the 'Auto Predict Report' row, showing options: 'Edit', 'Duplicate', 'Delete', 'Run', and 'Download Report' (highlighted with a red box). The 'Download Report' button is also highlighted with a red box in the table row.

Name	Type	Cubes	Last Modified	Last Run
AUTO PREDICT - SUB VARIABLE Auto Predict using variable	Auto Predict	OEP_FS	06-18-2025 6:43 PM Rajapriya Maran	06-18-2025 18:43:31 PM Completed
Auto Predict Report	Auto Predict	OEP_FS	06-18-2025 7:47 PM Rajapriya Maran	06-19-2025 12:02:56 PM Completed

Auto Predict Summary Page



 Auto Predict Report Page



Oracle EPM Planning – IPM Insights (Prediction Insight)

Prediction Insight – The prediction insight looks for variance between the future scenarios such as forecasts and computer-generated predictions.

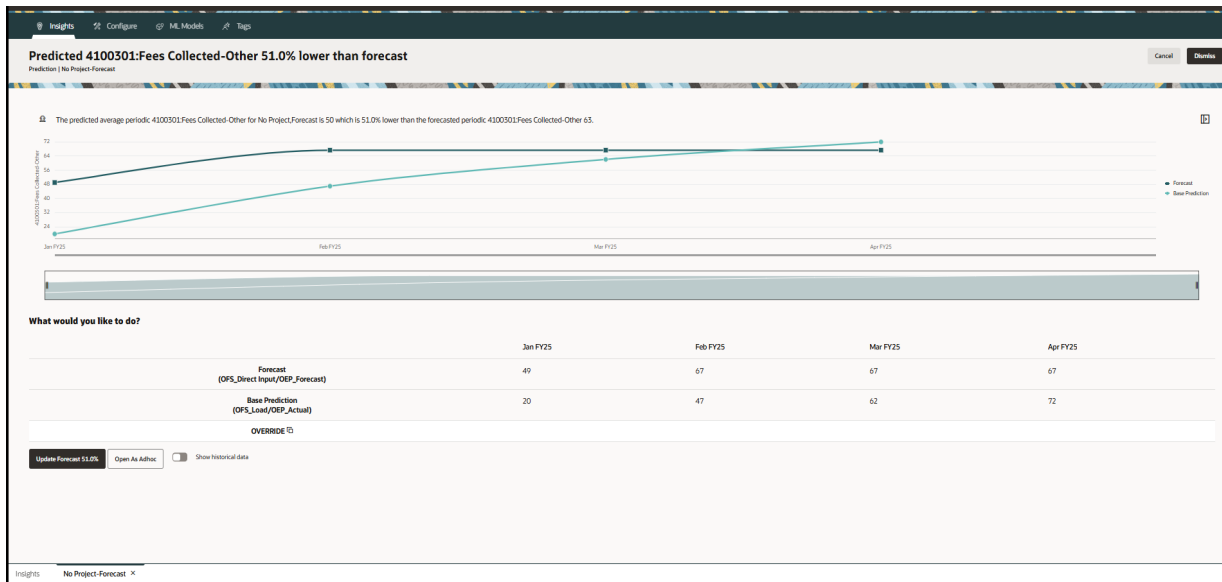
- ❑ Selecting the configuration type from the types page. **Type – Prediction Insight**
- ❑ Provide the data slice which we want see the variance between the forecast and base prediction combination

The screenshot shows the 'Types' page in the IPM Configuration wizard. The 'Types' step is highlighted with a red box. The 'Details' section contains two text boxes: 'Name with min 3 and max 80 characters' (containing 'Prediction Insight - NEW') and 'Description with max 200 characters' (containing 'Only Prediction Insight'). Under 'Generate Predictions', the 'None' radio button is selected. Under 'Generate Insights', the 'Prediction Insights' checkbox is selected and highlighted with a red box. A description for 'Prediction Insights' is provided: 'Looks for variance between future scenarios such as forecasts and computer-generated predictions.' A toggle switch for 'Do you have prediction data available?' is at the bottom.

The screenshot shows the 'Future Data' page in the IPM Configuration wizard. The 'Future Data' section has a dropdown menu set to 'Q4 FY25'. The 'Forecast' and 'Base Prediction' sections each have a list of data slices. The 'Forecast' list includes: Account (4300001), Scenario (Q4_Forecast), Version (Q4_Working), Currency (USD), Calendar (06434), Plan Element ('QPS_Direct Input'), Product (P00000), Project ('No Project'), and Customer (C18763). The 'Base Prediction' list includes: Account (4300001), Scenario (Q4_Actual), Version (Q4_Working), Currency (USD), Calendar (06434), Plan Element ('QPS_Load'), Product (P00000), Project ('No Project'), and Customer (C18763).

Planning – IPM Insights (Prediction Insight)

- ❑ Once after **run** the prediction insight from the configuration, we can be able to see the **variance percentage** and with the **dashboard**.
- ❑ **Update Forecast** – This update forecast option will update the forecast data based on the error percentage.
- ❑ **Open As Adhoc** – This Open As Adhoc option will modify the data based on the insight percentage. When click on Adhoc option, that moment will open in webform, there you can be able to modify the data.



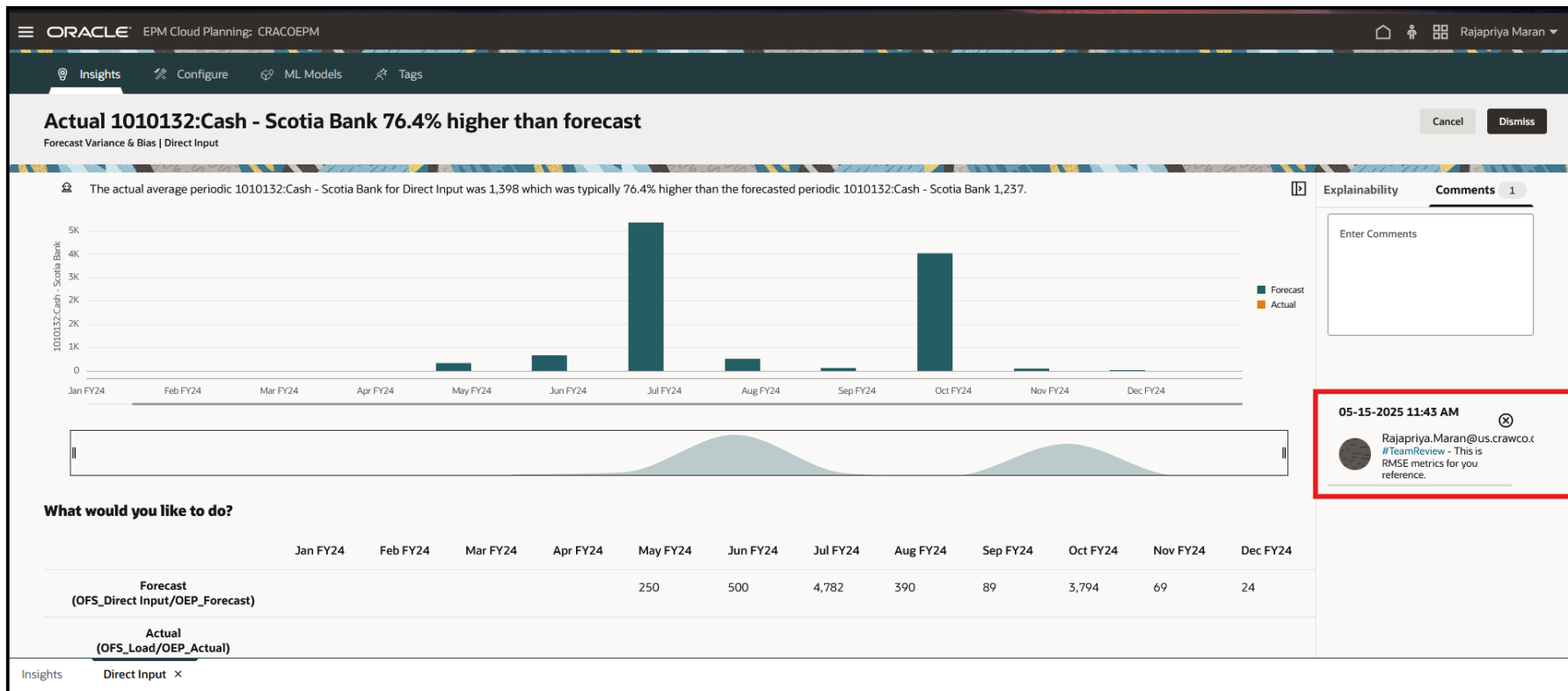
The webform displays a detailed table of metrics and variance for '4100301:Fees Collected-Other'. The table includes columns for 'OEP_Actual', 'OEP_Forecast', 'Metric values', 'Threshold', and 'Variance'. A red box highlights the 'Variance' column, which shows a value of 82.1%.

	OEP_Actual	OEP_Forecast	Metric values	Threshold	Variance
Standard variance			-51.0%	51.0%	
Metric values			-51.0%	51.0%	
Threshold			5%	5%	
Variance					82.1%

Below the table, a 'MAPE' (Mean Absolute Percentage Error) section shows a value of -51.0%.

Planning – IPM Insights (Tags)

- ❑ Tags are used to collaborate with colleagues and organize insights. We can be used to notify individuals users or groups, to filter and emphasize insights on dashboards.
- ❑ Use # to tag insights with a custom label. For example, we can tag a set of insights for team review by adding **#TeamReview**. Use @ to tag a **user** or **group**.



How do you currently manage scenario planning for uncertain market conditions?

- A. ERP-based scenario modeling
- B. We do not perform scenario planning
- C. AI-driven simulations
- D. Manual what-if analysis



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Oracle EPM Planning - Predictive Cash Forecasting

- ❑ Designed to help treasurers and cash managers perform short-term tactical or mid-term operational cash forecasting.
- ❑ It allows for daily, weekly, or monthly rolling forecasts that can be generated for operational, financial, and investing cash flow line items.
- ❑ It is built using a direct cash flow method and enables decision-making and actions for cash optimization across multiple legal entities within the business.
- ❑ **This option can be enabled while creating application and cannot be enable for existing application.**
Application type need to select **Cash Forecasting**.

Create Application: General

Back Cancel

1 General 2 Dimensions Mapping 3 Details 4 Customize 5 Review Next

* Name PCFDemo

* Description Cash Forecasting Application

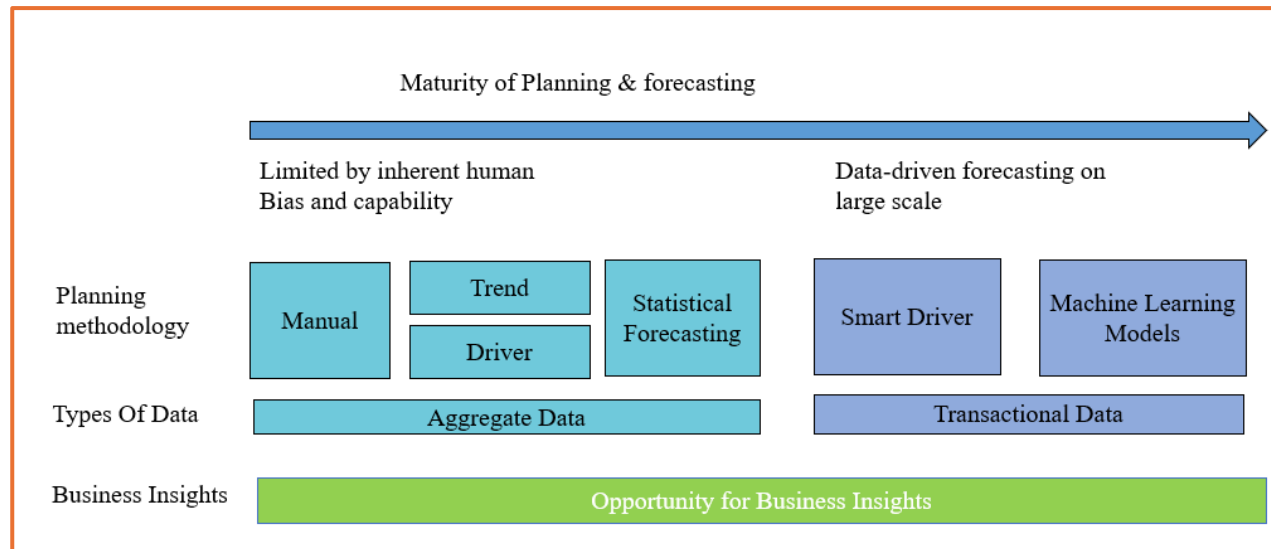
* Application Type Cash Forecasting

Oracle EPM Planning - Predictive Cash Forecasting

Benefits of cash Forecasting

- ❑ Optimize cash by finding problems and opportunities earlier with increased automation and more frequent cash forecast updates.
- ❑ Take action faster by aligning stakeholders and unifying scenario planning with corrective actions.
- ❑ Enable operational improvements through deeper insights into order-to-cash and procure-to-pay.

Business Benefit: Predictive Cash Forecasting enables companies to make better use of their cash with data-driven continuous cash forecasting.



Oracle EPM Planning - Predictive Cash Forecasting

Features in Cash Forecasting

- ❑ **Integrated and automated process** - Predictive Cash Forecasting allows for pulling the data from external systems to drive the cash forecast based on outstanding invoices and transactions. For forecasts beyond a certain period or for certain cash line items, data can be pulled in from any source through Data Integration.
- ❑ **Real-time and accurate forecasts** - applying targeted forecasting models and intelligent predictions and it supports multiple cash forecasting process cycles, short-term and medium-term.
- ❑ **What-If Scenarios** - What-if planning with the ability to create multiple scenarios that support real-time decision-making.
- ❑ **Adjustment to forecast** - Ability to use direct entry planning for manual adjustments to the forecast based on human judgment
- ❑ **Flexible reporting**—Multiple views for the data, such as aggregation and grouping, flexible filtering, time periods, view by Region, Legal Entity, Bank, Bank Account, Cash Pools on a daily, weekly, and monthly basis.

Reference Link: [Predictive Cash Forecasting](#)



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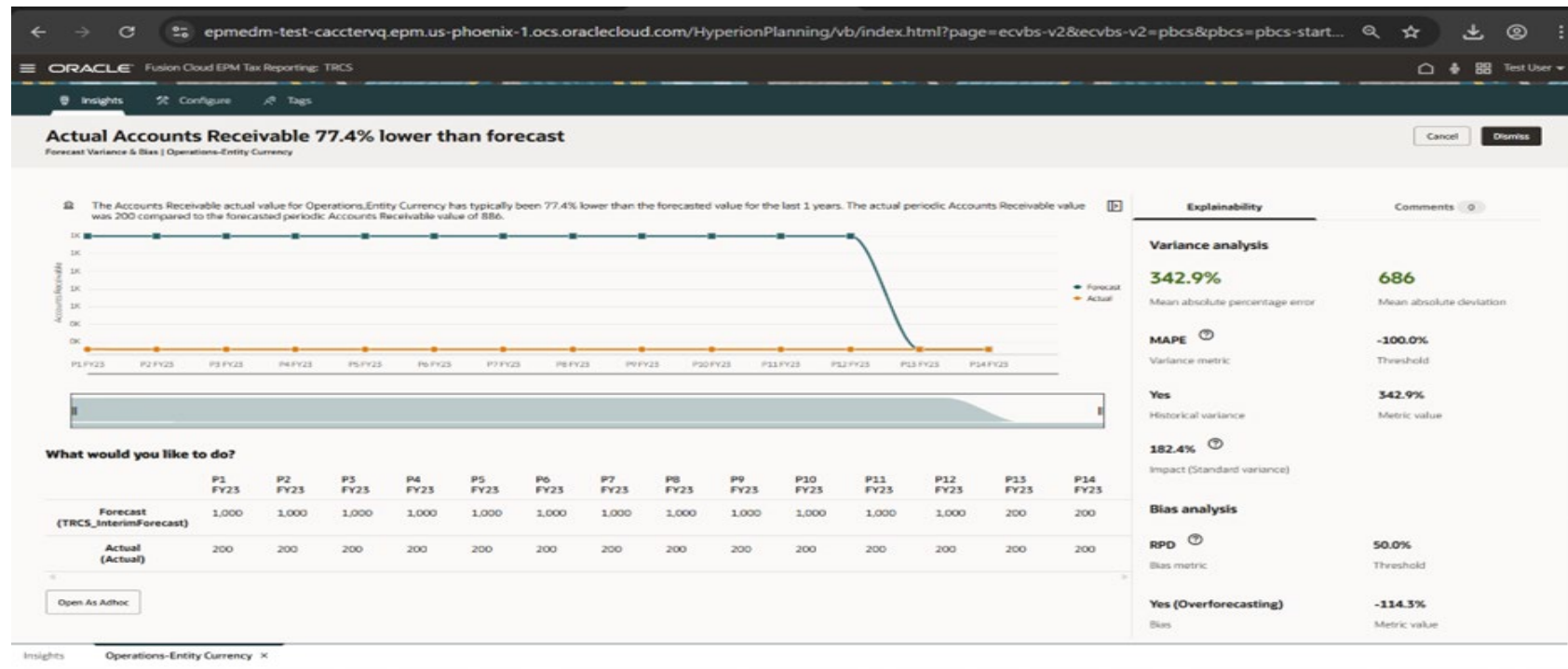


Forecast Variance & Bias Insights

Forecast Variance & Bias Insights:

- This type of insight measures the variance or bias between two historical scenarios such as Forecasts and Actuals.

Example:



Anomaly Insights

Anomaly Insights:

- ☐ Anomaly insights detect unusual patterns in data that deviate from expected results.

Example:



IPM Insights Benefits:

- ☐ Reduces the timing in Data Analysis.
- ☐ Improves forecast accuracy and reliability.

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Monte Carlo Simulations

What is Monte Carlo Simulations?

- ❑ A Monte Carlo simulation is defined as a computational technique that uses random sampling to model and analyze complex systems or processes.
- ❑ Monte Carlo Simulation is a powerful forecasting tool used in financial planning instead of assuming single rate of return for your investment, it runs thousands of possible scenario to estimate your financial future.
- ❑ It is a technique used to understand the impact of risk and uncertainty.

What is Simulation?

- ❑ A **simulation** is when you create a **model or imitation** of a real-world process or system so you can study how it behaves—**without actually doing it in real life**.

Features in Monte Carlo Simulations

- ❑ **Confidence in Planning**-Shows success probabilities for financial goals.
- ❑ **Risk Awareness**-Reveals impact of market volatility; supports better financial decisions.
- ❑ **What-If Scenarios**-Enables real-time planning through scenario comparisons.
- ❑ **Proactive Strategy**-Tests personalized options like early retirement or investment changes.



Monte Carlo Simulations

Steps of Monte Carlo Simulations

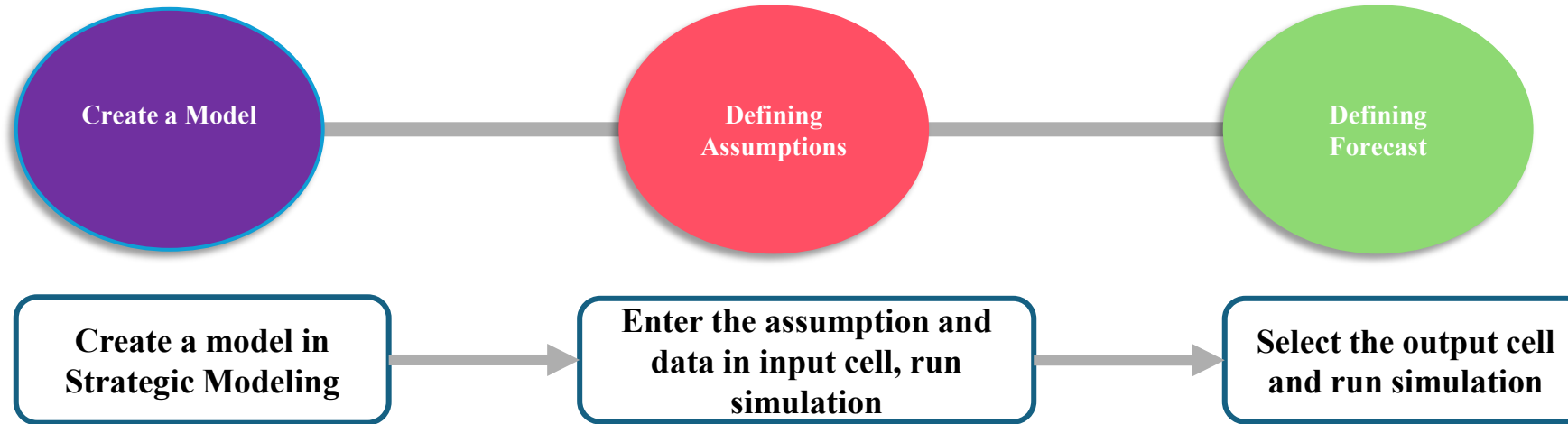
A simulation iteratively performs these steps:

- ❑ For every assumption cell, a random number is generated according to the range you defined and is placed in the model. Strategic Modeling generates random numbers using the Multiplicative Congruential Generator method.
- ❑ The model is recalculated.
- ❑ A value is retrieved from every forecast cell and added to the chart in the forecast results area.

Advantages	Disadvantages
Handles Complexity – Solves problems too complex for analytical methods.	Computationally Intensive – Requires many iterations; can be slow and resource-heavy.
Incorporates Uncertainty – Models variability for more realistic outcomes.	Sensitive to Inputs – Inaccurate data or assumptions can skew results.
Probabilistic Results – Offers a range of outcomes with likelihoods.	Lacks Analytical Insight – Doesn't explain underlying mechanisms deeply.
Aids Decision-Making – Helps visualize risks and make informed choices.	Complex to Build & Interpret – Can be time-consuming and hard to understand.

Monte Carlo Simulations

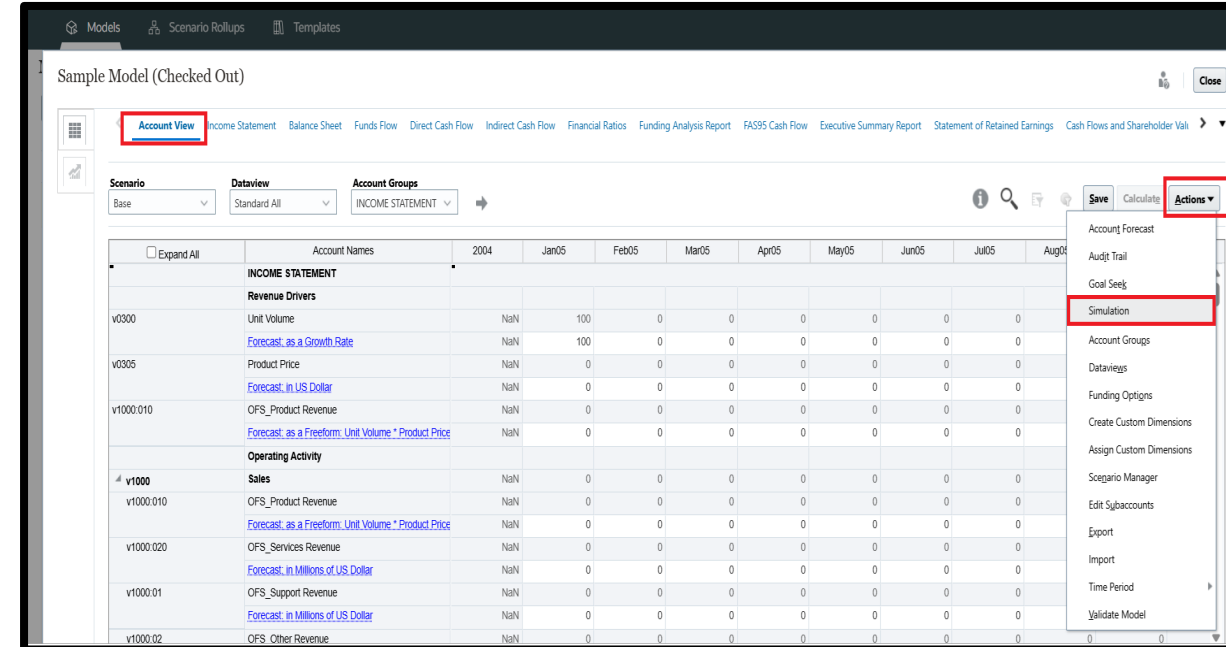
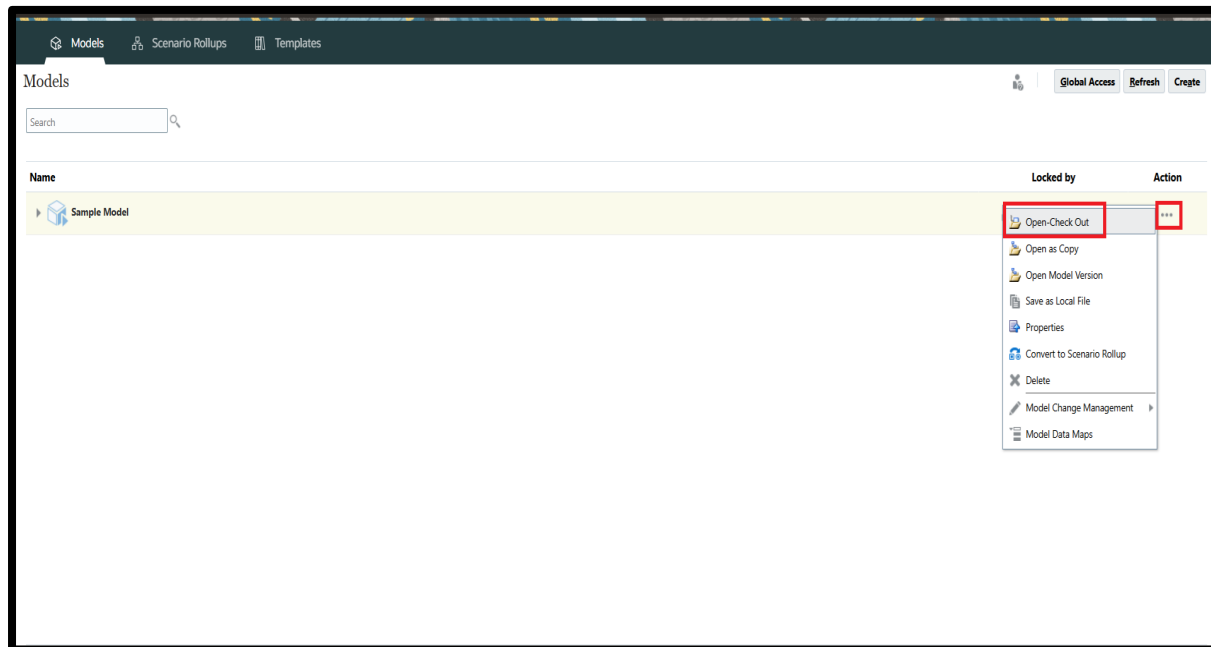
Flow Chart for Monte Carlo Simulations Steps



Note: This is an iterative process that continues until either the number of trials is reached or you stop the simulation. The final forecast chart reflects the combined uncertainty of the assumption cells on the forecast cells

Monte Carlo Simulations (Model)

- ❑ **Step 1:** Create Model.
- ❑ **Step 2:** In Action Click **Open-Check Out**.
- ❑ **Step 3:** In the **Account View**, from the **Actions** menu, click **Simulation**.



Monte Carlo Simulations (Defining Assumptions)

- ❑ **Step 1:** To define a simulation, first determine your key **input cells** and define them as **assumptions**.
- ❑ Select any input cell and enter data in it and click **Set Assumption**.
- ❑ **Step 2:** Select any Assumption model, here we selected **Normal**.
- ❑ **Step 3:** Enter **Mean and Std.Dev** the simulation have to run in Simulation tab.
- ❑ **Step 4:** Click **Run** button.
- ❑ **Step 5:** If you want to stop the simulation, click on **stop** button.
- ❑ **Step 6:** Once the simulation done, Click **OK**.

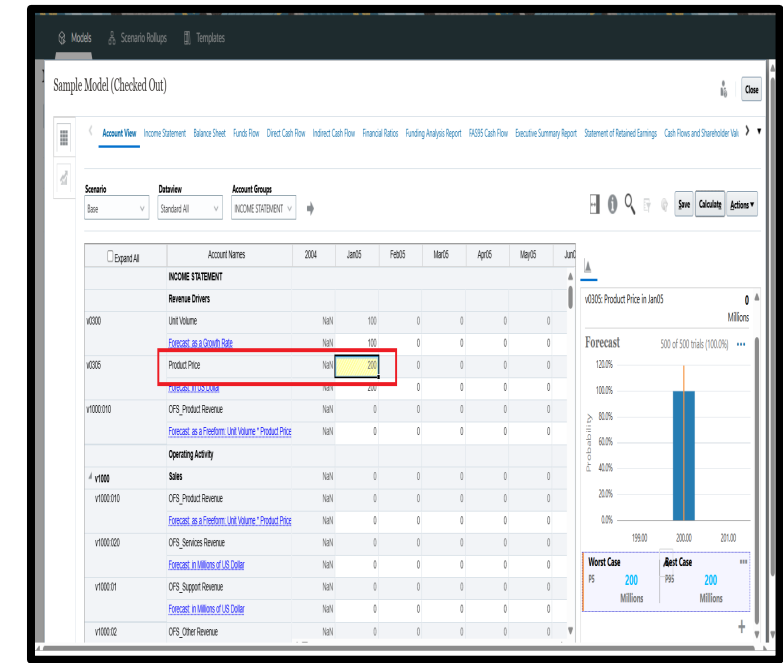
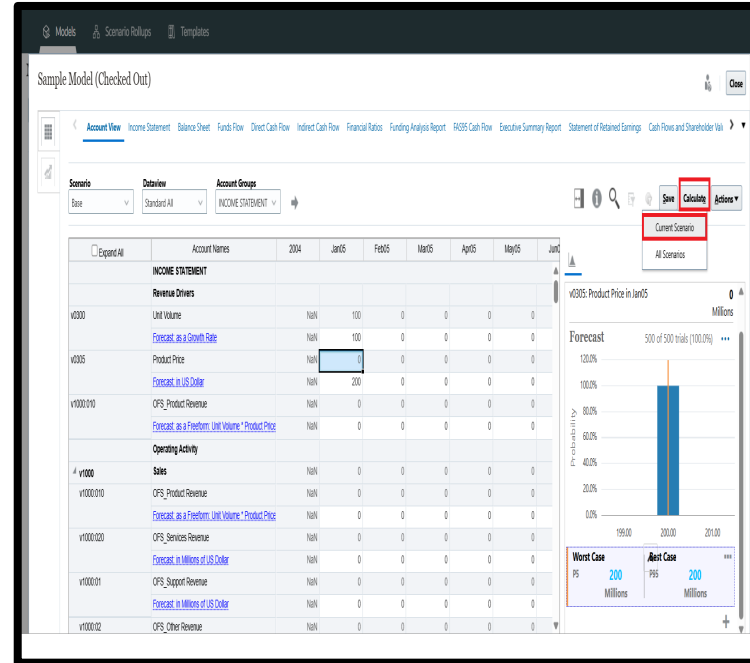
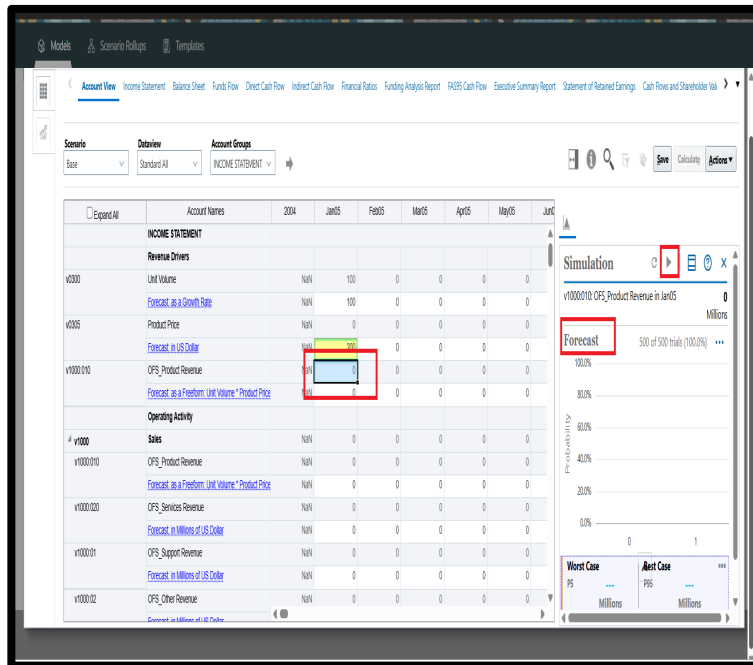
The screenshot shows the Oracle Financials software interface. The main window displays a spreadsheet with various financial data. A dialog box titled 'Set Assumption' is open, showing the 'v0305 Product Price in Jan05' cell selected. The dialog box has a 'Set Assumption' button highlighted with a red box.

The screenshot shows the Oracle Financials software interface. The main window displays a spreadsheet with various financial data. A dialog box titled 'Simulation' is open, showing the 'v0305 Product Price in Jan05' cell selected. The 'Simulation' button is highlighted with a red box.

The screenshot shows the Oracle Financials software interface. The main window displays a spreadsheet with various financial data. A dialog box titled 'Assumption' is open, showing the 'v0305 Product Price in Jan05' cell selected. The 'Assumption' button is highlighted with a red box.

Monte Carlo Simulations (Forecast)

- ❑ **Step 1:** Select an output row in the **Account View**. On the **Simulation** panel, click **Set Forecast**. After you run a simulation, the **Forecast** results area displays the results of the simulation for cells you defined as forecast cells.
- ❑ **Step 2:** If you want to stop the simulation, click **Stop** button.
- ❑ **Step 3:** Click **OK**.
- ❑ **Step 4:** Click **Calculate**, Click **Current Scenario**.
- ❑ **Step 5:** Now the data for selected output cell is calculated.



What is your organization's primary goal for implementing an EPM solution?

- A. Reducing reliance on spreadsheets
- B. Enhancing data governance and master data management
- C. Improving budgeting and forecasting accuracy
- D. Streamlining financial close processes



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Bring Your Own ML

- ❑ Bring Your Own ML (BYOML) lets businesses use their own pre-built Machine Learning (ML) models within Oracle EPM Free Form applications.
- ❑ Organizations can import their own ML models into platforms like Oracle Free Form to enhance budgeting and forecasting accuracy. These models analyze historical data and predict future trends, such as revenue forecasts and cash flow projections.

How BYOML Works:

- ❑ **Data Scientists Build, Planners Utilize:** The fundamental principle is that data scientists, who possess the expertise in building and training complex ML models, create these models externally .
- ❑ **Seamless Integration:** The trained ML models are then imported or connected to the planning system. This often involves standardized formats like PMML (Predictive Model Markup Language) or API integrations.
- ❑ **Enhanced Forecasting and Prediction:** Once integrated, the ML models can be used by planners to generate more accurate and sophisticated forecasts, predictions, and insights that inform planning decisions.



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Bring Your Own ML

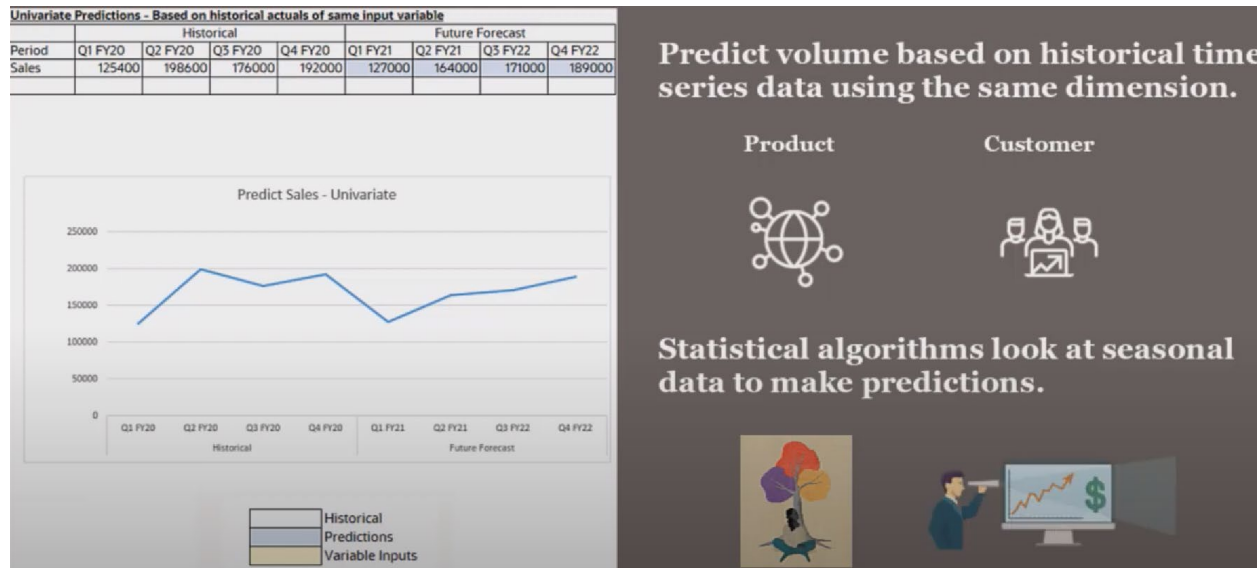
Types of Prediction

Univariate Prediction:

❑ This type of prediction focuses on forecasting the future values of a **single variable** based only on its own past values.

Examples:

- ❑ Predicting next month's **sales** based Only on historical sales data.
- ❑ Forecasting the **stock price** of a single company using only its past stock prices.
- ❑ Estimating next week's **website traffic** purely from previous weeks' traffic



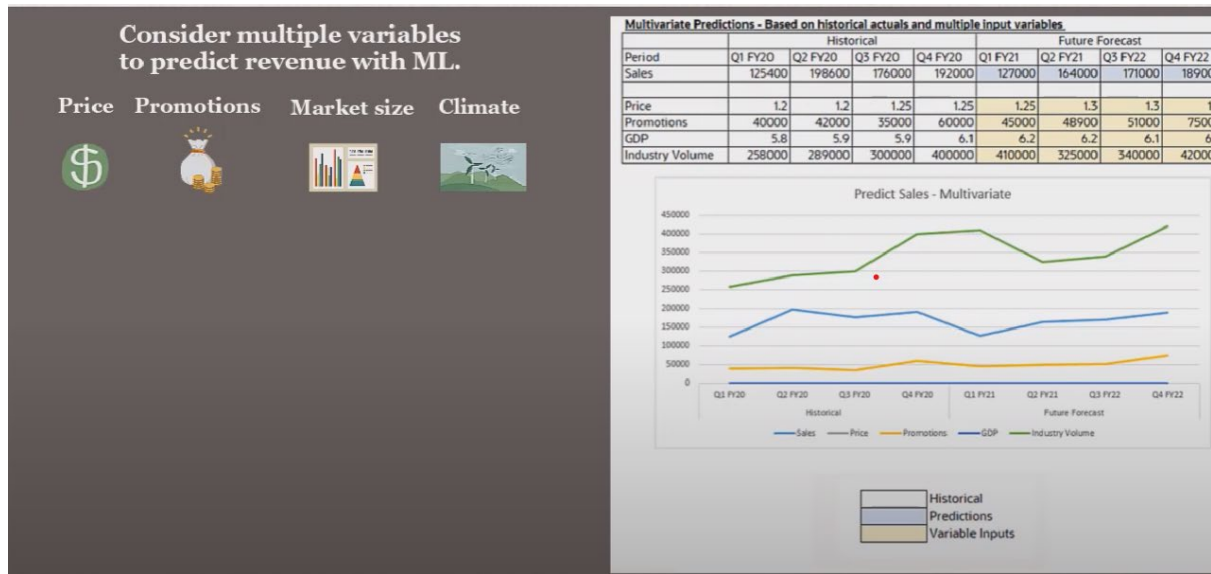
Bring Your Own ML

Multivariate Prediction:

Multivariate prediction forecasts a variable (or multiple variables) by looking at how it's influenced by and interacts with **several other factors**, not just its own past.

Example:

- ❑ Predicting product sales using past sales, promotions, competitor prices, and the economy.
- ❑ Forecasting city-wide energy use based on past usage, weather, time of day, and holidays.
- ❑ Predicting a company's stock price by looking at its past performance, industry trends, economic health, and how competitors are doing.



Bring Your Own ML

Advantages of ML

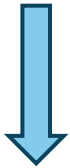
- ❑ **Better Predictions:** ML studies huge amounts of past data to give more accurate forecasts for revenue, expenses, and cash flow.
- ❑ **Early Problem Detection:** It finds hidden patterns in data to warn about risks and spot opportunities before they happen.
- ❑ **Clean and Reliable Data:** ML automatically checks and cleans data, reducing mistakes and improving accuracy.
- ❑ **Fast and Smart Decisions:** It provides real-time insights, helping businesses make quick and informed decisions when market conditions change.
- ❑ **Smart Scenario Testing:** Businesses can run complex “what-if” analyses to predict outcomes of strategies like new product launches or market expansions.

Bring Your Own ML

ML Model Configuration Flow Diagram

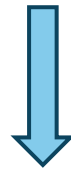
ML MODEL

Import Model



Here We need
to Drop the
PMML file

Generate Rule



Model Mapping



Input



Output

Analyse Model



Regression
Coefficient(To
View
Prediction
Graph)

Test Model



Test Model



Output

Bring Your Own ML (Configuring ML Model)

Import ML Model

1 Import Model 2 Generate Rule 3 Analyze Model 4 Test Model

Import Model

Drag and Drop
Please drop or browse PMML file (.pmml)

Selected file: testing3.pmml

Actions

Import ML Model

1 Import Model 2 Generate Rule 3 Analyze Model 4 Test Model

Model Mapping

Please map the ML model's output and input features with relevant cube dimensions and its members. A feature can be mapped to a dimension member (Cell value), dimension (Member value), or can be left blank (which will be used as a Prompt).

Select Cube: OEP_FS

Currency Company Plan Element Product Project

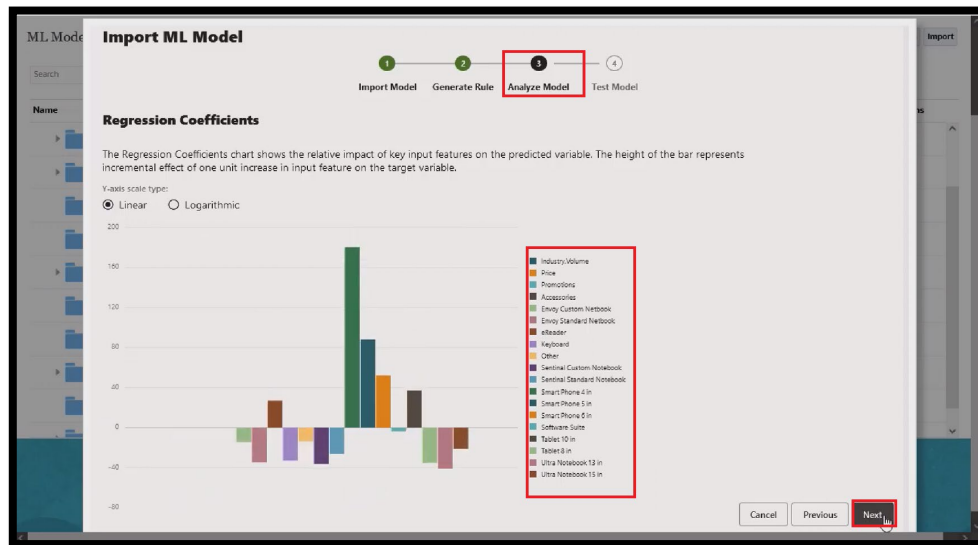
Input

Feature Name	Display Name	Data Type	Input Type	Member
Product	Product	string	Member	Product
Industry:Volume	Industry:Volume	double	Prompt	
Price	Price	double	Prompt	
Promotions	Promotions	double	Prompt	

Output

Feature Name	Display Name	Data Type	Input Type	Member
Volume	Volume	double	Cell Value	

Cancel Previous **Next**



Import ML Model

1 Import Model 2 Generate Rule 3 Analyze Model 4 Test Model

Test Model

You can test the ML model by generating prediction for a sample set of input values. Please enter values for the input features shown below and predict.

Input

Feature Name	Display Name	Value
Product	Product	Enter a string value.
Industry:Volume	Industry:Volume	Enter a double value.
Price	Price	Enter a double value.
Promotions	Promotions	Enter a double value.

Output

Feature Name	Display Name	Value
Volume	Volume	--

Cancel Previous Predict **Save and Close**

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PCM

Generative AI Features

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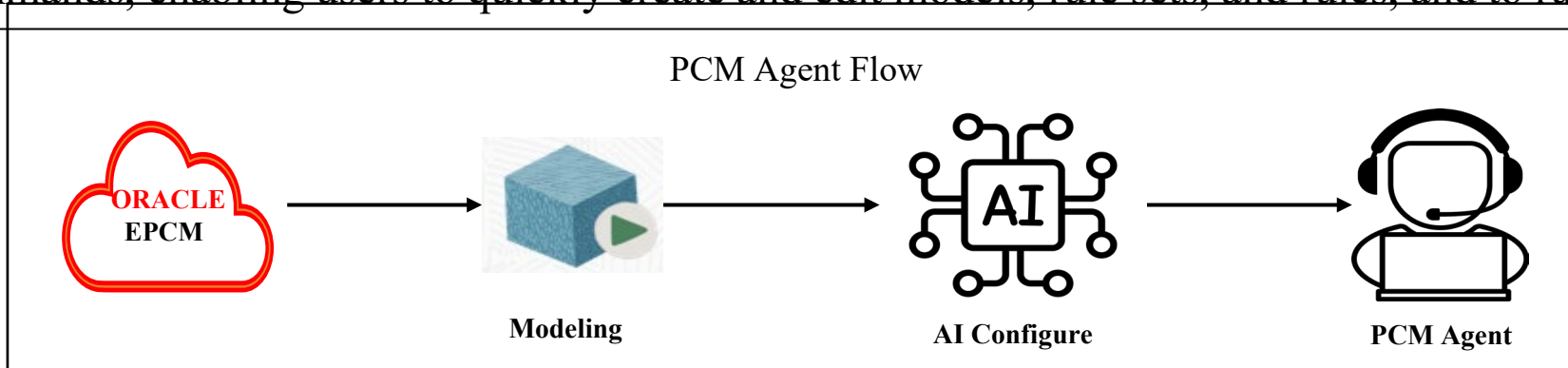
o o o o

PCM Agent -Configure

Oracle PCMCS is a cloud-based solution within Oracle EPM that helps organizations accurately measure, allocate, and analyze costs and profitability across products, customers, business units, and more.

The PCM Agent utilizes natural language guidance to simplify complex tasks, such as model building and management, thereby reducing the effort required to define model artifacts.

Business Benefit: Generative AI enhances workflow efficiency by assisting with modeling tasks and commands, enabling users to quickly create and edit models, rule sets, and rules, and to run analytic traces.

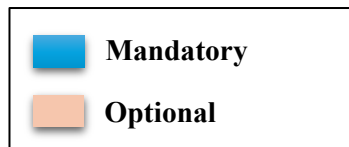
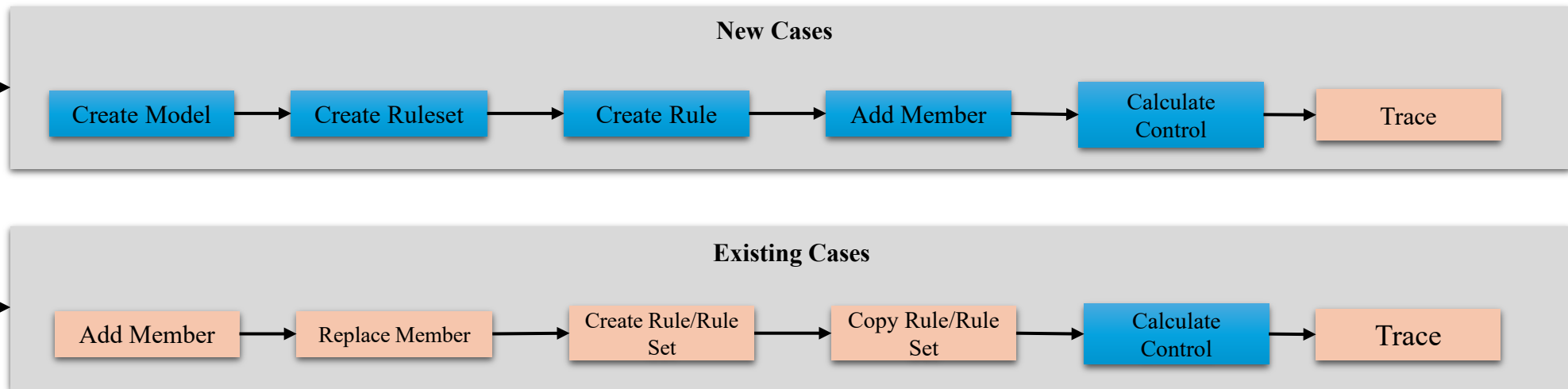


Usage: Using the PCM Agent enhances efficiency, accuracy, and time savings by automating tasks such as model creation, rule definition, and analysis. This AI agent reduces manual effort and enables users to focus on strategic analysis and decision-making.

PCM Agent -Flow



PCM Agent



Create model using PCM Agent

Model Creation – Kindly provide the requisite text to generate the model, the model's name, description, and contextual information. The model will be instantiated based on the submitted input. Refer to the attached screenshot for details regarding the model creation process.

The screenshot displays the PCM Agent web interface within a browser window. The browser's address bar shows the URL: `epmedm-cacctervq.epm.us-phoenix-1.ocs.oraclecloud.com/HyperionPlanning/vb/index.html?v=25.05.72&page=ecvbs-v2&efsLandingPage...`. The Oracle EPM Cloud Enterprise Profitability and Cost Management (EPM) header is visible at the top.

The main interface is titled "PCM Agent" and features a "Create Model" section on the left. This section contains a table with the following data:

Name	Description	Selections
Test_Actual	Actual allocation Process for FY24	Driver : NoDriver Future1 : NoFuture1 Future2 : NoFuture2 View : Periodic

To the right of the table is a "View Models Page" button. Further right, a "Suggestions" section is active, displaying a suggestion: "Create model 'Test_Actual' Description 'Actual allocation Process for FY24' Context Driver.NoDriver Context Future1.NoFuture1 Context Future2.NoFuture2 Context View.Periodic". Below this, the "Criteria" section shows "Command Type: Create Model" and a "Run Command" button. A status message indicates "Command ran successfully". At the bottom of the interface, there are buttons for "Create Model", "Create Rule Set", "Create Rule", "Add Member", and "Repl", along with a text input field containing "Try 'Create Rule Set...'".

Create Ruleset using PCM Agent

Ruleset Creation - Kindly provide the requisite text to generate the ruleset, including the model name, ruleset name, calculation mode, sequence numbers, optional description, and contextual information. The ruleset will be created within the specified model. Please refer to the attached screenshot for detailed guidance on the ruleset creation process.

The screenshot displays the Oracle EPM Cloud Enterprise PCM Agent interface. The 'Create Rule Set' section is highlighted with a red box, showing a table with the following data:

Name	Use Model Context	Sequence	Enabled	Calculation Mode	Number of Iterations	Selections	Description
Actual	Yes	1	Yes	Serial Calculation			

To the right, a 'Suggestions' panel is also highlighted with a red box, containing the text: 'For Model 'Test_Actual', Create ruleset 'Actual' mode CALC_MODE (optional- Serial) sequence SEQUENCE (optional - 1-5) use model context FLAG (optional - True) enable FLAG (optional - True)'. Below this, the 'Criteria' section shows 'Command Type: Create Ruleset' and 'Chosen Model Name: Test_Actual'. A 'Run Command' button is visible, and a status message indicates 'Command ran successfully'. At the bottom, there are buttons for 'Create Model', 'Create Rule Set', 'Create Rule', 'Add Member', and 'Repl', along with a text input field for 'Try "Copy Rules to Ruleset..."'.

Create Rule using PCM Agent

Rule Creation – Submit the necessary information to generate a rule, including the rule name, associated ruleset name, sequence number, rule activation status, contextual details, and allocation option. The rule will be created within the specified ruleset based on the provided input. Refer to the attached screenshot for details on the rule creation process.

The screenshot displays the Oracle PCM Agent web interface. The top navigation bar includes links for Models, Designer, Model Validation, Calculation Control, Calculation Analysis, Rule Balancing, Jobs, Data, AI Configure, and PCM Agent. The main content area is titled 'PCM Agent' and features a 'Create Rule' section on the left, which is highlighted with a red box. This section contains a table with the following data:

Name	RuleSet Context	Sequence	Enabled	Rule Type	Description
Actual Allocation	Yes	1	Yes	Allocation	The allocation will happen for the actual scenario

To the right of the table is a 'View Waterfall Page' button. Further right, a 'Suggestions' section is visible, also highlighted with a red box. It contains a text box with the following text: 'Create RULE_TYPE rule 'Actual Allocation' (required - Allocation) in ruleset Actual with description 'The allocation will happen for the actual scenario' sequence SEQUENCE (optional - 1-5) use ruleset context FLAG (optional - True) enable FLAG (optional - True)'. Below this, a 'Criteria' section shows 'Command Type: Create Rule', 'Chosen Model Name: Test_Actual', and 'Chosen Ruleset Name: Actual'. A 'Run Command' button is present, and a message below it states 'Command ran successfully'. At the bottom, there are buttons for 'Create Model', 'Create Rule Set', 'Create Rule', 'Add Member', and 'Repl', along with a text input field labeled 'Try "Replace Member..."'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 1:19 PM on 12/6/2025.

Adding members in rules using PCM Agent

Add Members— Using the PCM Agent, submit the dimension members for the source or dimension through the provided text. Attached is a reference screenshot showing the created members within the specific allocation rule.

The image displays two side-by-side screenshots of the PCM Agent web interface, showing the execution of an 'Add Member' command. Both screenshots show the 'PCM Agent' tab selected in the top navigation bar.

Left Screenshot: The 'Suggestions' section contains a message: "For Model 'Test_Actual', add member CC7000, from dimension 'Entity' (required) to RULE_COMPONENT component (required - SOURCE) within rule 'Actual Allocation' (optional) within ruleset 'Actual'". Below this, the 'Criteria' table is shown:

Command Type	Model name	Dimension
Add Member	Test_Actual	Entity
Rule Component	Rules	Rule Types
Source	Actual Allocation	-
Rulesets	New Members	Comment
Actual	CC7000	PCMAssistant Add Member Command

Below the table, there are buttons for 'Create Model', 'Create Rule Set', 'Create Rule', 'Add Member', and 'Repl:'. A text input field contains the text "Try 'Create Model...'".

Right Screenshot: The 'Suggestions' section contains a message: "Job has been submitted successfully with id : 10". Below this, the 'Criteria' table is shown:

Command Type	Model name	Dimension
Add Member	Test_Actual	Entity
Rule Component	Rules	Rule Types
Destination	Actual Allocation	-
Rulesets	New Members	Comment
Actual	CC8300	PCMAssistant Add Member Command

Below the table, there are buttons for 'Create Model', 'Create Rule Set', 'Create Rule', 'Add Member', and 'Repl:'. A text input field contains the text "Try 'Enable Rules...'".

Calculate a model using PCM Agent

Allocation Calculation– Using the PCM Agent, calculate the allocation from source to destination based on the specified POV (Point of View). Attached is a screenshot of the executed allocation model.

The screenshot displays the Oracle PCM Agent interface. The top navigation bar includes the Oracle logo and the text 'EPM Cloud Enterprise Profitability and Cost Management: BksML50'. The main menu contains icons for Models, Designer, Model Validation, Calculation Control, Calculation Analysis, Rule Balancing, Jobs, Data, AI Configure, and PCM Agent. The PCM Agent tab is active, showing a 'PCM Agent' header. Below the header, there is a 'Suggestions' section with a toggle switch and a 'Clear' button. A red box highlights a suggestion: 'Calculate Model 'Test_Actual' pov FY24:Jan:Actual:Working (required) Clear Calculated Data (optional - true) Execute Calculation (optional - true) Capture Diagnostic Data (optional - false) Capture Essbase Debug Scripts (optional - false) Optimize for Reporting (optional - true)'. Below this, a 'Criteria' section is shown, also highlighted with a red box. It contains a table with three columns: Command Type, Chosen Model Name, and Specified POV. The table lists the following criteria:

Command Type	Chosen Model Name	Specified POV
Calculate Model	Test_Actual	FY24:Jan:Actual:Working
Reference POV	Generated POVS	Processing Range
-	-	All Rules
Run Calculation	Capture Diagnostics Data	Clear Calculated Data
Yes	No	Yes

Below the table, there are buttons for 'Create Model', 'Create Rule Set', 'Create Rule', 'Add Member', and 'Repl:'. A text box below these buttons contains the text 'Try "Enable Rules..."'.

Calculate a model using PCM Agent

Added member– The attached screenshot displays the job status resulting from the execution of the allocation model.

The screenshots show the Oracle EPM Cloud interface for EPM Cloud Enterprise Profitability and Cost Management: BksML50. The top screenshot shows a job with status 'Processing' and the bottom screenshot shows the same job with status 'Completed'.

Top Screenshot (Job 24):

Job ID	Name	Type	Status	User	Start	End	Duration	Actions
24	FY24:Jan:Actual:Working	Run Calculation	Processing	Rajapriya Maran	6/12/25 11:17:03 AM			...

Bottom Screenshot (Job 26):

Job ID	Name	Type	Status	User	Start	End	Duration	Actions
26	FY24:Jan:Actual:Working	Run Calculation	Completed	Rajapriya Maran	6/12/25 11:22:17 AM	6/12/25 11:22:46 AM	00:00:28	...

Run Trace using PCM Agent

Run Trace– Run the trace based on the specified POV using the PCM Agent. Upon execution, the allocated data both inbound and outbound can be viewed through the graphical representation for analysis and validation.

The screenshot displays the Oracle PCM Agent web interface. The top navigation bar includes the Oracle logo and the text 'EPM Cloud Enterprise Profitability and Cost Management: BksML50'. The main menu contains icons for Models, Designer, Model Validation, Calculation Control, Calculation Analysis, Rule Balancing, Jobs, Data, AI Configure, and PCM Agent. The PCM Agent tab is active, showing a 'Form Selections' table and a 'Suggestions' panel.

Form Selections

Selection Type	Dimension	Member Selections
Row	Entity	CC7000,CC703,CC7102,CC7101,CC7200,CC7100,CC8300
Row	Account	Allocation Account
POV	Years	FY24
POV	Version	Working
POV	Customer	Webstore-000
POV	Currency	USD
POV	Product	NoProduct
POV	Period	Jan
POV	Activity	NoActivity
POV	Driver	NoDriver
POV	Future1	NoFuture1
POV	Future2	NoFuture2

Suggestions

- pov POV (optional - current POV | Year, Period, Scenario, Version)
- cube CUBE_NAME (optional - default - PCM_CLC)
- selection DIMENSION.MEMBER - (optional - list of member selections)

run trace data form 'Trace - Actual Allocation' pov FY24::Jan::Actual::Working cube PCM_CLC

Criteria

Command Type	Selected POV	Cube Name
Run Trace	FY24::Jan::Actual::Working	PCM_CLC

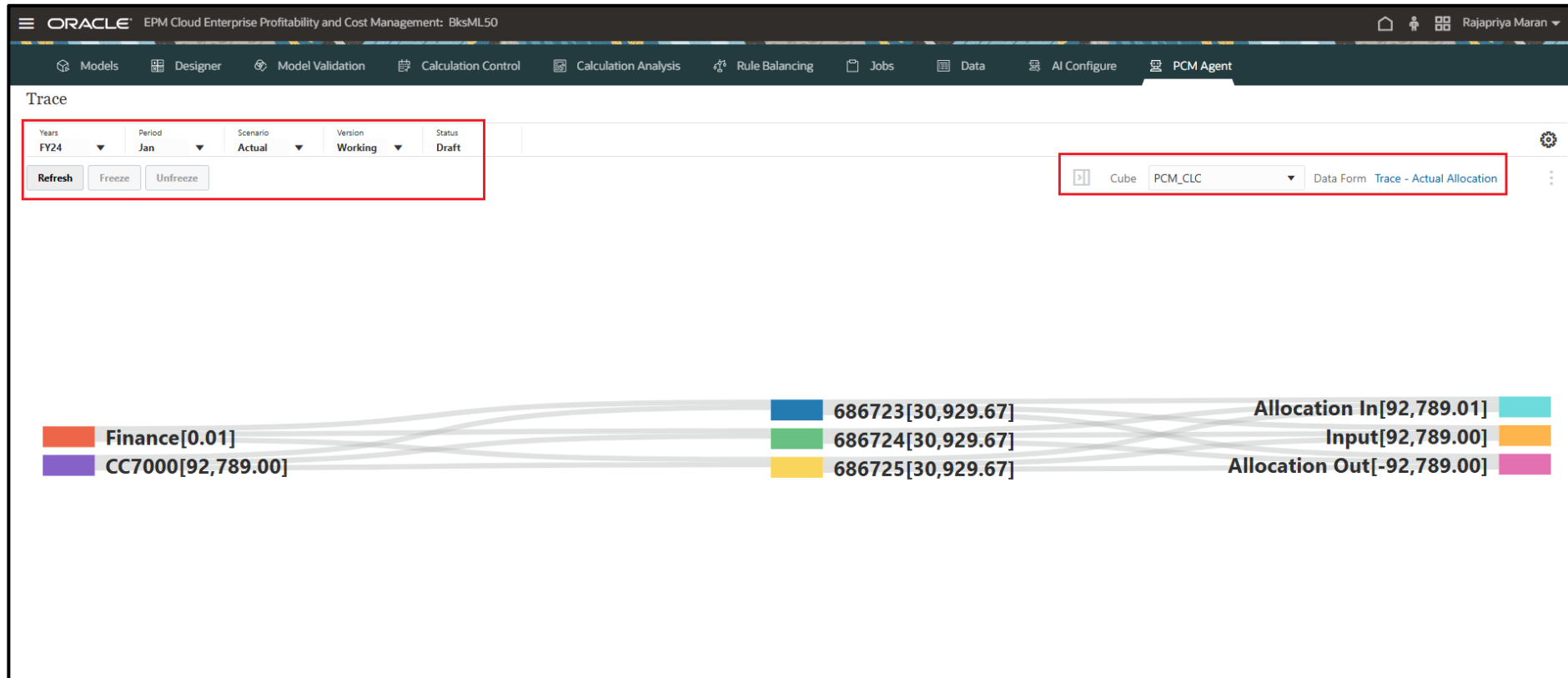
Dataform Name
Trace - Actual Allocation

Create Model Create Rule Set Create Rule Add Member Repl: >

Try "Copy Rules to Model..."

Run Trace using PCM Agent

Run Trace— Attached screenshot for the allocated data visual representation using trace.



What is your organization's current approach to cost allocation?

- A. Manual allocation using spreadsheets
- B. Custom-built allocation engine
- C. ERP-based allocation rules
- D. We do not perform cost allocation



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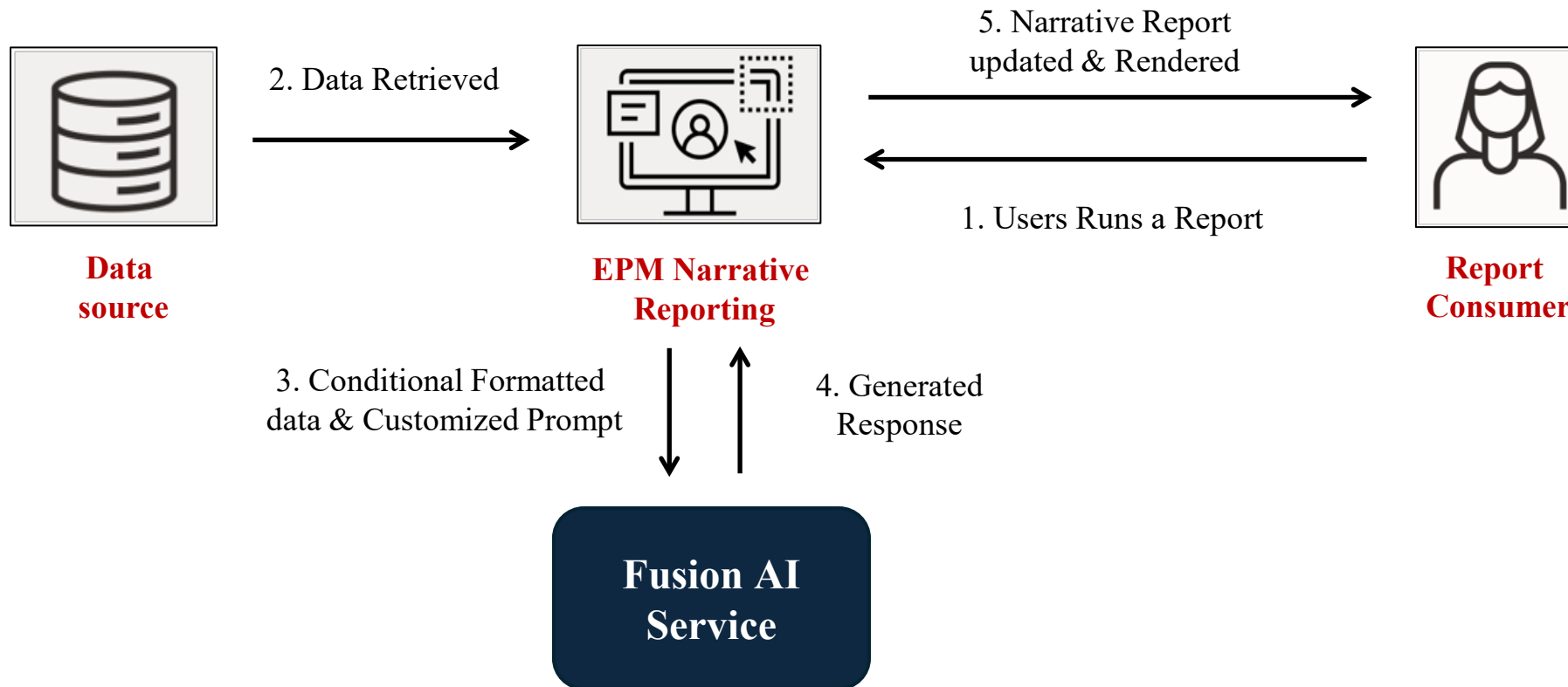
Partner

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High-Level Architecture for Generative AI (GenAI) in Reports

Oracle Narrative Reporting is a cloud-based solution within Oracle EPM designed for management, regulatory, and narrative reporting. It enables organizations to combine financial data with written commentary, providing context and insights for both internal and external stakeholders.

The flow diagram uses the Generative AI feature in the management report within Oracle Narrative Reporting Cloud.



Generative AI for Management Reporting Narratives

- ❑ Reports provide the ability to utilize Generative AI (GenAI) for generating **narrative summaries** in a **text box**. It is used for following **three** cases.

Describing Exceptions

**Describing the causality
for exceptions**

**Performing a
comparative analysis**

- ❑ **Describing Exceptions** - Describe the **cell(s)** where a condition is satisfied.
- ❑ **Describing the causality for exceptions** - Examine one of the relevant **cell dimensions** where the condition was satisfied and describe the **top 3 contributors** to it.
- ❑ **Performing a comparative analysis** - If the grid has **prior time periods** in the **columns**, describe the cell value in **comparison** to the prior period.

Reference Link - https://docs.oracle.com/en/cloud/saas/enterprise-performance-management-common/dmepr/working_with_genAI.html

Describing Exceptions

Conditional format

Sample Edit Conditional Format/Text

Name * Significant Sales Contribution

Applies To 2C

Define condition to be met for conditional format to be applied

Column Value D greater than Value 10

AND

Column Value C less than Value 0

Conditional Text

AutoTextSummary()

Enable Analytics

OK Cancel Close

Result

Sample Report 13a (GenAI - Describe Exception)

Fiscal Calendar Jan Years FY23 Segments AllSegments

vision
All Segments | January 2023

Vision Corporation
Revenue Variance by Territory
Run Date: 01-Oct-24 4:47:58 PM
By System

	Actual	Plan	Variance %
USA	51,507,709	58,948,596	-12.6%
Canada	2,482,299	2,808,258	-11.6%
Brazil	2,810,150	2,788,253	0.8%
Europe	42,819,661	48,503,319	-11.7%
China	4,964,598	5,573,493	-10.9%
Hong Kong	3,723,449	4,187,249	-11.1%
Japan	2,482,299	2,758,140	-10.0%
Total Entities	125,016,551	141,041,842	(11.4%)

Major revenue contributors with a variance below Plan:
Net Revenue's Variance % for USA in January 2023 was -12.6%.
Net Revenue variance % for Europe in January 2023 was -11.7%.

- ❑ This slide displays the **condition setup** and the **resulting AI-generated report text (Narrative)**.
- ❑ The applied condition is: **Column D > 10** and **Column C < 0**.
- ❑ When these conditions are met, a narrative text box is automatically generated at the **bottom** of the report.

Describing the causality for exceptions

Conditional format

Edit Conditional Format/Text

Name * Causality for exceptions

Applies To 2D

Define condition to be met for conditional format to be applied

Current Cell Value greater than Value 120000000

Condition Text

Enable Analytics

AutoTextSummary(ZOOM)

Result

Sample Report 13c (GenAI - Causality for Exceptions)

Years FY21 Segments AllSegments Accounts 410000

vision
Net Revenue | All Segments | 2021

Vision Corporation
Major Market Summary Report
Run Date: 01-Oct-24 4:51:23 PM
By System

	Q1	Q2	Q3	Q4
North America	160,150,418	178,225,775	183,347,657	174,592,709
Latin America	19,793,872	22,027,905	22,660,946	21,578,874
EMEA	131,359,332	146,185,186	150,386,281	143,205,256
APAC	45,858,952	52,964,174	55,622,323	48,422,266

In Quarter4, 2021, the Net Revenue for North America across all segments amounted to 174,592,709 USD. The top 3 contributing entities were the USA with a value of 162,822,414 USD, Canada with 7,846,863 USD, and Mexico contributing 3,923,432 USD.
In Quarter4, 2021, the Net Revenue for EMEA stood at 143,205,256 USD. The top contributing regions were Europe with a value of 135,358,393 USD, followed by the Middle East and Africa, each with a value of 3,923,432 USD.

- ❑ This slide highlights a condition applied to a specific cell where the **value is greater than 12,000,000**.
- ❑ To apply this, the **respective dimension** from the grid row must be selected.
- ❑ Once the condition is met, the AI-generated narrative explains how the value was derived.
- ❑ It also provides a **contributor list** for the specific account, offering detailed breakdowns directly in the report.

Performing a comparative analysis

Conditional format

Edit Conditional Format/Text

Name * Comparative analysis

Applies To Row 2 Data Cells

Define condition to be met for conditional format to be applied

Current Cell Value not equals Value 0

Conditional Text

AutoTextSummary(COMPARE)

Result

Sample Report 13b (GenAI - Comparative Analysis)

Years FY21 Entities Total Entities Segments All Segments

vision
Total Entities | All Segments | 2021

Vision Corporation
Summary P&L
Run Date: 01-Oct-24 4:53:17 PM
By System

	Q1	Q2	Q3	Q4
Gross Profit	133,176,691	146,903,613	149,569,670	143,653,051
Operating Expenses	130,684,916	99,048,550	103,672,845	110,078,583

Gross Profit for Quarter 1, 2021 was 133,176,691 USD across all segments. Gross Profit for all segments of Total Entities in Q2, 2021 was USD 146,903,613, which reflected an increase of USD 13,726,922 or 10% compared to Q1. Gross Profit for All Segments in Quarter 3, 2021 was 149,569,670 USD, which is an increase of 2,666,057 or 2% compared to Quarter 2, which stood at 146,903,613 USD. Gross Profit for Total Entities in Quarter 4, 2021 was USD 143,653,051, showing a decrease of USD 5,916,619 or -4% compared to Quarter 3, 2021.

- ❑ This slide shows a new condition setup and its corresponding AI-generated report text.
- ❑ The condition checks if the values for **Q1, Q2, Q3, and Q4 are not equal to 0**.
- ❑ Using the **Auto Text Summary (COMPARE)** parameter, the system compares the quarterly data and generates a narrative at the bottom of the report.

Generative AI for Governors and Limitations

Governors	Limitations
A maximum of 150 conditions can be applied to cells in a grid. If this limit is exceeded , the Generative AI narrative text will not be generated	The comparative analysis use case can only be applied to a Period dimension and but not on other dimension types.
A maximum of 5 threads can be used for calls to the Fusion GenAI service. If a large Report, Book, or Bursting Definition is running and all threads are in use, any additional executions will queue until threads become available	The comparative analysis use case can only be applied to a Period dimension and but not on other dimension types. Such as Monthly, Quarterly and not mixed generation The describe the causality for exceptions and the comparative analysis use cases can only be applied to data cells and not formula cells.

Reference Link - https://docs.oracle.com/en/cloud/saas/enterprise-performance-management-common/dmepr/working_with_genAI.html



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What is your organization's strategy for automating financial insights

- A. ERP-based automation
- B. Manual reporting
- C. We do not automate insights
- D. AI-generated narratives and dashboards



Please use the Q&A Icon at the bottom of your screen



Q&A



For More Information



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