

# Oracle EPM Adapter

Click Through Presentation

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# ORACLE EPM CLOUD CONNECTIVITY WITH OIC



## Key Connectivity Capabilities

| Direction          | Category                             | EPM Cloud Mechanism                       | Connectivity through OIC    |
|--------------------|--------------------------------------|---|-----------------------------|
| Trigger (into OIC) | Process Automation                   | Invoke Process Automation Close Tasks     | ◆ Through EPM Cloud Adapter |
| Invoke (from OIC)  | Process Automation/ Event Monitoring | Update Close Tasks for Process Automation | ◆ Through EPM Cloud Adapter |
|                    |                                      | Update Close Tasks for Event Monitoring   | ◆ Through EPM Cloud Adapter |
|                    | Real Time APIs                       | File Upload/Download                      | ◆ Through REST adapter      |
|                    |                                      | Business processing                       | ◆ Through REST adapter      |

- ◆ Connectivity through the OIC EPM Cloud Adapter
- ◆ Connectivity through an OIC Technology Adapter

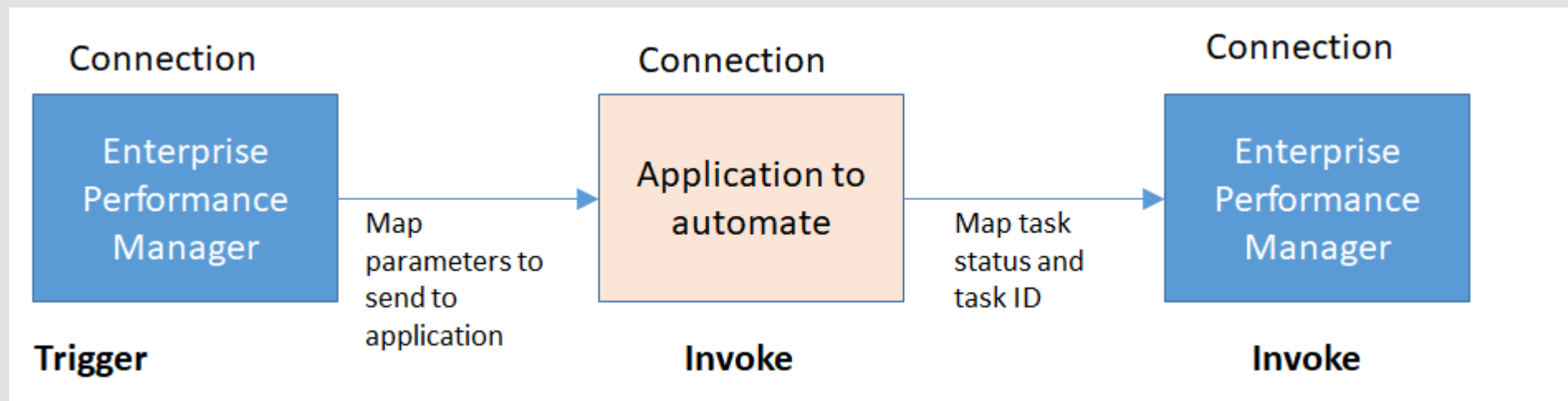


## Common Integration Use Cases

- Synchronize period close activities across financial cloud applications from EPM
- Monitor critical ERP events enabling the timely orchestration of EPM activities
- Automate the movement of financial data from ERP to EPM



# Integration Patterns - 1



Use Task Manager with Oracle Integration to invoke a business operation in another application:

*OIC Implementation*

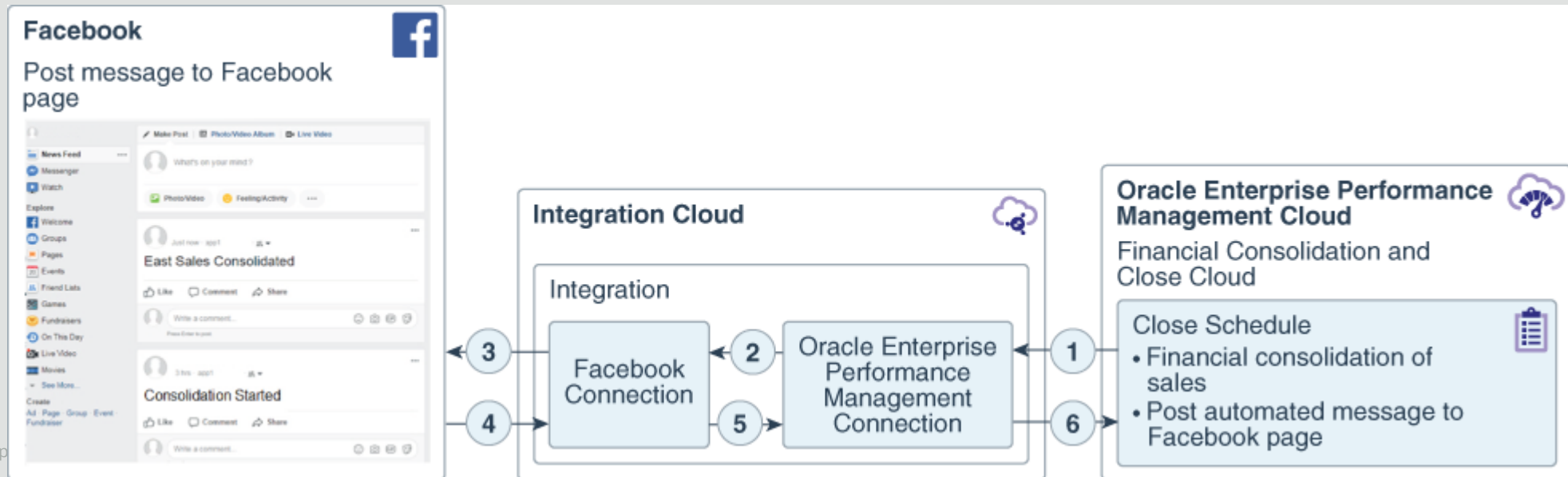
- Add an Enterprise Performance Management connection as the trigger so that the integration can be triggered by Task Manager.
- Add a connection to the application that you want to automate as an invoke.
- Add an Enterprise Performance Management connection as an invoke to send status back to Task Manager.

# Integration Patterns - 1

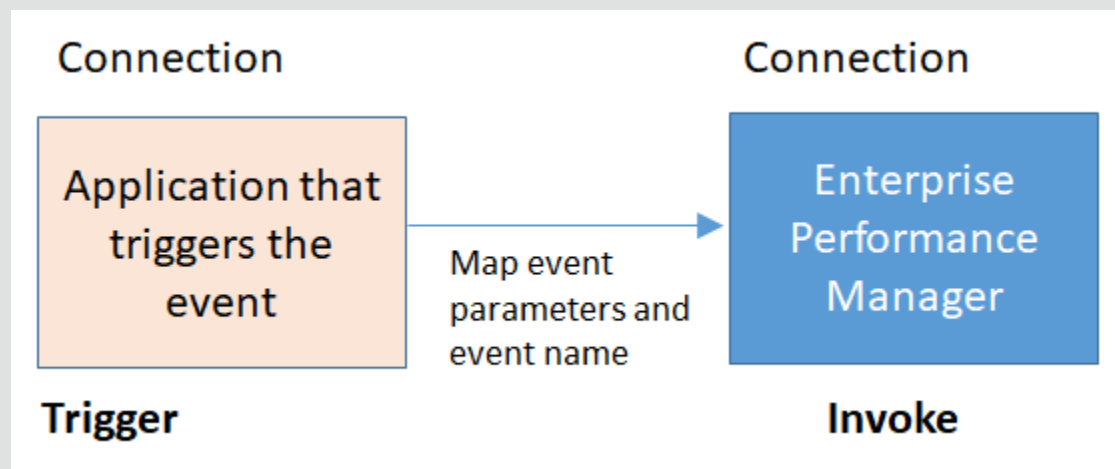
## Example Use Case: Post a Message on Facebook when Financial Close Completes

Let's assume that every time a financial close task has been completed in Task Manager, you want to post a message to your company's Facebook page to indicate that the sales have been consolidated.

When financial consolidation of sales is complete, the integration is triggered.



# Integration Patterns - 2



Use Task Manager with Oracle Integration to monitor events in another application that resides on-premise or on the Cloud. For example, whenever a General Ledger period closes in Oracle E-Business Suite, you want to retrieve specific data and send it to Task Manager.

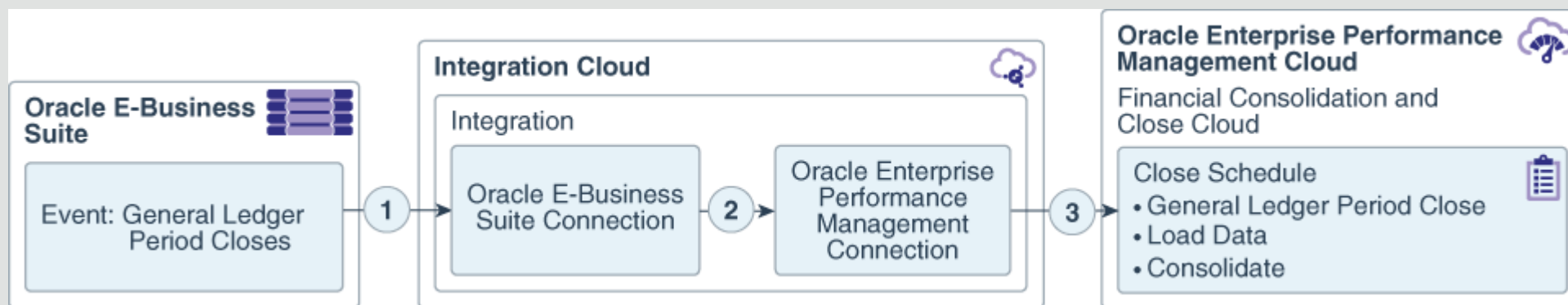
*The application from which the event is triggered is the trigger.*

- *The Enterprise Performance Management connection is an invoke to send notification of the event back to Task Manager.*

# Integration Patterns - 2

## Example Use Case: Monitor Events in Other Applications

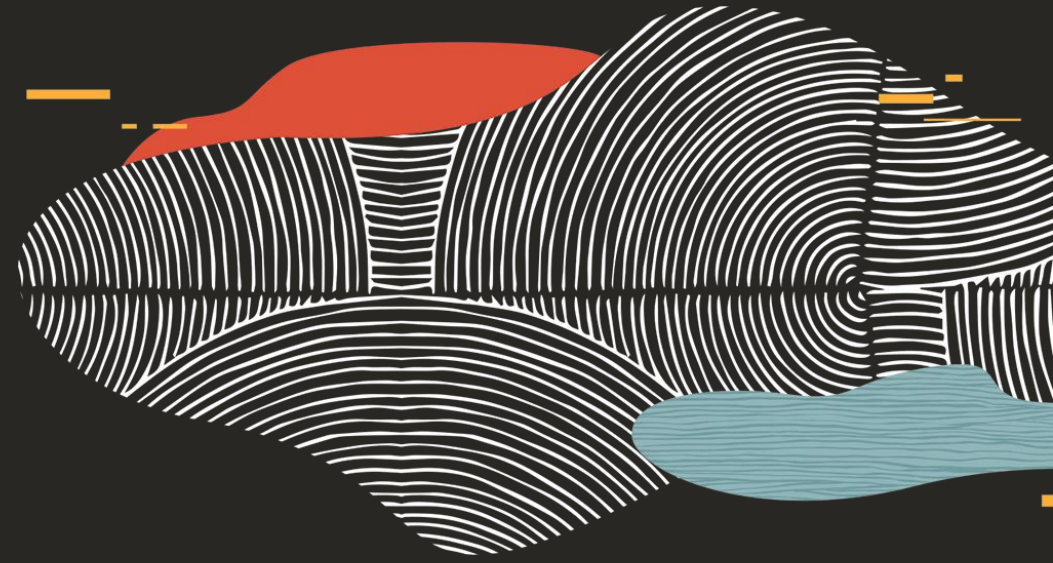
For example, build an integration in Oracle Integration with an Oracle E-Business Suite connection and an Enterprise Performance Management connection. Whenever a General Ledger Period closes in Oracle E-Business Suite, the integration is triggered, and data is sent back to Task Manager.



**Oracle EPM Adapter**



# Connection Overview





# Search and Select for EPM

<

Design

Integrations

Connections

Events

Lookups

Libraries

Packages

Agents












Adapters

ORACLE

Connections

Updated by peter.obert@oracle.com

49 connections

| Name   | Type  | Usage           | Last           |
|--|---|-----------------|----------------|
|  michelin<br>michelin   | Oracle Enterprise Performance Management... | 3 Integrations  | Nov 18 10:14:3 |
|  pob ai doc understanding<br>https://docs.oracle.com/iaas/api/#/en/document-understanding/latest/   https://do... | REST  | 5 Integrations  | Nov 14 04:32:1 |
|  Oracle HCM ConnectionDev18   | Oracle HCM Cloud                            | 0 Integrations  | Nov 13 10:21:2 |
|  shared-demo-eqiq-dev18-ERP   | Oracle ERP Cloud                            | 12 Integrations | Nov 13 10:19:2 |
|  Oracle HCM Connection  | Oracle HCM Cloud                            | 6 Integrations  | Nov 13 10:14:3 |
|  pob-hcm-test-dev18-atomfeeds   | Oracle HCM Cloud                            | 3 Integrations  | Nov 13 10:02:3 |
|  Oracle ERP Cloud Connection  | Oracle ERP Cloud                            | 10 Integrations | Nov 13 09:54:1 |
|  pob_LLDemo_ATP   | Oracle ATP                                  | 3 Integrations  | Oct 9, 02:54:1 |
|  pob-HCM-EmpREST  | REST  | 6 Integrations  | Oct 9, 02:35:1 |
|  pob_ftp_oic_embedded   | FTP   | 7 Integrations  | Oct 9, 02:33:1 |
|  pob-OICtoOPA-Invoke<br>Invoking the process automation to create new process instances                         | REST  | 4 Integrations  | Oct 2, 11:36:3 |
|  pob-HCM-APIGWEmpREST   | REST  | 1 Integrations  | Sep 26 11:15:1 |

Create connection


Select the adapter to use for this connection

Oracle recommends creating integrations in a project for better manageability and easier observability.

perf

Oracle Enterprise Performance Management Cloud

# Provide name for Oracle SPM Adapter Connection

**Create connection**  
 Oracle Enterprise Performance Management Cloud adapter

Name

pob-mich-EPM-Demo

Identifier

POB\_MICH\_EPM\_DEMO

Role

Trigger and invoke

Keywords

Description

<

Create

# Configure Service Type and Connectivity

ORACLE

<

pob-EPM-DEMO-mich

...

Test

Save

Configured

Role

Trigger and invoke

Identifier

POB\_EPM\_DEMO\_MICH

Updated on

Nov 18, 2024, 12:54:29 PM CET

Used in

0 integrations

Properties

Service Type

Financial Consolidation and Close

Financial Consolidation and Close

Tax Reporting

Planning and Budgeting

Username

demoadmin

Password

.....

Configuration progress

100 %

✔ Create connection

✔ Configure connection properties

✔ Select a security policy and enter credentials

✔ Test connection



# 7. Test and Save Connection

The screenshot displays the Oracle Cloud console interface for configuring a connection. At the top, the Oracle logo is visible on the left, and navigation icons are on the right. The main header shows the connection name 'michelin' with a back arrow, a three-dot menu, and 'Test' and 'Save' buttons. Below the header, a table lists connection details: 'Configured' status, Role 'Trigger and invoke', Identifier 'MICHELIN', Updated on 'Nov 18, 2024, 10:14:30 AM CET', and Used in '3 integrations'. A confirmation message at the top right states: 'CONFIRMATION Connection michelin was tested successfully.' The main content area is divided into two sections: 'Properties' and 'Security'. The 'Properties' section includes a 'Service Type' dropdown set to 'Financial Consolidation and Close' and a 'Connection URL' text field containing 'https://epm-301876-fcc.hap.iad.demoservices003.oraclepdemos.com'. The 'Security' section is set to 'Basic Authentication' and includes a 'Username' field with 'demoadmin' and a 'Password' field with masked characters and a visibility toggle. To the right of these fields is a 'Configuration progress' section showing a 100% completion bar and a list of four steps, all marked with green checkmarks: 'Create connection', 'Configure connection properties', 'Select a security policy and enter credentials', and 'Test connection'.

**ORACLE**

< michelin  
michelin

...

Test Save

**Configured**

| Role               | Identifier | Updated on                    | Used in        |
|--------------------|------------|-------------------------------|----------------|
| Trigger and invoke | MICHELIN   | Nov 18, 2024, 10:14:30 AM CET | 3 integrations |

**CONFIRMATION**  
Connection **michelin** was tested successfully.

**Properties**

Service Type  
Financial Consolidation and Close

Connection URL  
https://epm-301876-fcc.hap.iad.demoservices003.oraclepdemos.com

**Security**  
Basic Authentication

Username  
demoadmin

Password  
.....

**Configuration progress**  
100 %

- ✓ Create connection
- ✓ Configure connection properties
- ✓ Select a security policy and enter credentials
- ✓ Test connection





**Oracle EPM Adapter**



# Supported Invoke Operations

# Basic Info for the Invoke Action

ORACLE

< POB-Demo-michevent 1.0.0 Configured

Share Save

Notification  
Notification1

Map  
EPM\_ReferenceUpd

Invoke  
EPM\_ReferenceUpd

What do you want to call your endpoint?  
EPM\_ReferenceUpd

What does this endpoint do?

Cancel Continue

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The screenshot displays the Oracle APEX interface for configuring a workflow. The main workspace shows a vertical sequence of three actions: a 'Notification' action (Notification1), a 'Map' action (EPM\_ReferenceUpd), and an 'Invoke' action (EPM\_ReferenceUpd). The 'Invoke' action is currently selected, and its 'Edit Basic Info' dialog is open on the right. The dialog contains two text input fields: 'What do you want to call your endpoint?' with the value 'EPM\_ReferenceUpd', and 'What does this endpoint do?'. The 'Continue' button is highlighted in the dialog's footer. The top of the interface shows the 'ORACLE' logo, the project name 'POB-Demo-michevent', and the version '1.0.0 Configured'. A toolbar with various icons is visible below the header. The bottom left corner shows a partial copyright notice 'Copyright © 2024 Or'.

# Select Operation You want to perform on EPM side

ORACLE

POB-Demo-michevent 1.0.0 Configured

Share Save

✂️ 📄 ↶ 📋 📅

Notification  
Notification1

Map  
EPM\_ReferenceUpd

Invoke  
EPM\_ReferenceUpd

□

### Edit Operation

Oracle Enterprise Performance Management Cloud invoke

Operation  
Update Task Status for Process Automated

Update Task Status for Process Automated

Update Task Status for Event Monitoring

Cancel Go back Continue

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# Finish configuration

ORACLE

< POB-Demo-michevent 1.0.0 Configured

Share Save

Notification  
Notification1

Map  
EPM\_ReferenceUpd

Invoke  
EPM\_ReferenceUpd

Summary  
Oracle Enterprise Performance Management Cloud invoke

Description

Endpoint URI  
<https://epm-301876-fcc.hap.iad.demoservices003.oraclepdemos.com/HyperionPlanning/res>

Operation  
Update Task Status for Process Automated

Cancel Go back Finish

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**Oracle EPM Adapter**



# Supported Trigger Operations

# Name your Endpoint(Triggered Action)

The screenshot displays the Oracle Cloud console interface. At the top, the breadcrumb navigation shows 'POB-Demo-michevent' with a version of '1.0.0 Configured'. The main workspace is a flow diagram with five steps: 'Trigger EPM\_SourceEvent', 'Note calltothersystem', 'Notification Notification1', 'Map EPM\_ReferenceUpd', and 'Invoke EPM\_ReferenceUpd'. On the right, the 'Edit Basic Info' panel is active, showing the endpoint name 'EPM\_SourceEvent' and a description field. The bottom right corner features 'Cancel' and 'Continue' buttons.

ORACLE

POB-Demo-michevent 1.0.0 Configured

Share Save

Edit Basic Info  
Oracle Enterprise Performance Management Cloud trigger

What do you want to call your endpoint?  
EPM\_SourceEvent

What does this endpoint do?

Trigger  
EPM\_SourceEvent

Note  
calltothersystem

Notification  
Notification1

Map  
EPM\_ReferenceUpd

Invoke  
EPM\_ReferenceUpd

Cancel Continue

# Select Task Manager connection and Integration Type

ORACLE

< POB-Demo-michevent 1.0.0 Configured

Share Save

Task Manager Connection  
OIC

Task Manager Integration Type  
OIC Integration PA

**Edit Operation**  
Oracle Enterprise Performance Management Cloud trigger

Trigger  
EPM\_SourceEvent

Note  
calltothersystem

Notification  
Notification1

Map  
EPM\_ReferenceUpd

Invoke  
EPM\_ReferenceUpd

Cancel Go back Continue

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# Finish The Configuration

ORACLE

< POB-Demo-michevent 1.0.0 Configured

Share Save

Summary  
Oracle Enterprise Performance Management Cloud trigger

EPM\_SourceEvent

Description

Endpoint URI  
/taskTrigger

Operation  
Trigger for Process Automated Task

Task Manager Connection  
OIC

Task Manager Integration Type  
OIC Integration PA

Trigger  
EPM\_SourceEvent

Note  
calltothersystem

Notification  
Notification1

Map  
EPM\_ReferenceUpd

Invoke  
EPM\_ReferenceUpd

Cancel Go back Finish

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# OIC GEN3 – What Is New in Details

An abstract graphic of a fingerprint, rendered in white lines on a dark background, positioned to the right of the main title.

Using the Oracle EPM Adapter with Oracle Integration 3

## **New OIC Features Every Release**

- [What's New for Oracle Integration 3](#)

## **PM blogs**

- [OIC PM Oracle Blog- Niall Commiskey](#)

- [OIC PM's – How To's](#)

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