

Oracle Planning 2026 Implementation Professional

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Version Demo

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QUESTION NO: 1

In which two ways do parent/child relationships between approval unit hierarchy members affect the review process?

- A. When the status of all children changes to one status (for example. Signed Off) the parent status changes to the same status.
- B. When you approve a parent. Its children are Signed Off.
- C. After all children are promoted to the same owner, the parent status is changed to Signed Off.
- D. After all children are promoted to the same owner, the parent is promoted to the owner.

ANSWER: A D

Explanation:

Approval-unit hierarchies support coordinated, bottom-up review processing in Oracle Planning. When the status of all children changes to one status (for example. Signed Off) the parent status changes to the same status. This status rollup lets reviewers see that the lower-level approval units have reached a consistent workflow state without requiring a separate status action on every parent. It also provides an accurate consolidated indication of review progress as related planning units move through the approval process.

After all children are promoted to the same owner, the parent is promoted to the owner. Promotion is therefore coordinated across the hierarchy: after the child approval units have been promoted to the same reviewer or owner, the corresponding parent can move to that owner as well. This preserves the hierarchy's review sequence and ensures that the appropriate reviewer receives responsibility for the consolidated parent-level unit only after the associated child-level work has been routed consistently. Oracle describes approval units, their hierarchy, ownership, status, and promotion behavior in its Planning documentation. See the [Oracle Planning approval-process documentation](#) and the [Oracle Planning and Budgeting Cloud documentation library](#).

QUESTION NO: 2

In which two ways can you affect the promotional path of an approval unit hierarchy?

- A. Modify owners and reviewers for approval units and their descendants.
- B. Create a task list with a task skip a user in the promotional path.
- C. Use the Approval Audit feature to view the data tasks performed by users and freeze those tasks for the user.
- D. Use data rules to determine whether a change in the approval unit promotional paths is necessary.

ANSWER: A D

Explanation:

The promotional path determines the sequence in which an approval unit moves through its assigned owners and reviewers during the approval process. Modifying owners and reviewers for approval units and their descendants directly affects that path because these assignments establish the responsible users at each point in the hierarchy. Applying an assignment to descendants is especially useful when a common approval responsibility must be propagated consistently throughout a branch of the approval-unit hierarchy.

Using data rules to determine whether a change in the approval unit promotional paths is necessary is also valid. Data rules can assess the planning data associated with an approval unit and help determine whether the normal approval routing remains appropriate. This enables the approval process to align with material data changes and governance requirements rather than treating every unit identically. Together, ownership and reviewer maintenance controls who participates in the path, while data-rule evaluation supports decisions about whether the path should be adjusted for the unit's circumstances.

Oracle's Planning documentation describes approvals, approval units, ownership, reviewers, and promotional-path management in the [Oracle Planning and Budgeting Cloud documentation](#). Additional Oracle guidance on approval administration is available through the [Enterprise Performance Management documentation library](#).

QUESTION NO: 3

With Machine Learning, which type of prediction would you define to predict using the same dimension, measure, and slice of data?

- A. Source Prediction
- B. Dimension Prediction
- C. Univariate Prediction
- D. Forecast Prediction

ANSWER: C

Explanation:

Univariate Prediction is the appropriate prediction type when the model is intended to predict values within the same dimensional context, measure, and selected data slice. In Oracle Planning predictive features, a univariate model uses the historical observations of one target series to identify its pattern and generate predicted values for that same series. The series is defined by the selected member combination, such as a particular account, entity, product, scenario, and time range, together with the relevant measure. The model therefore learns from prior values in that exact slice rather than relating one dimension or measure to another target. This is especially suitable for time-based planning data, where historical periodic values provide the basis for estimating future periods while preserving the current point of view in the form. Oracle Planning documentation describes predictive planning and prediction capabilities as part of its planning and forecasting workflow; the relevant product documentation is available in the [Oracle Enterprise Performance Management Cloud documentation library](#). Oracle also provides implementation and feature guidance through the [Oracle Planning product page](#).

QUESTION NO: 4

What feature can Service Administrators use to automatically complete all the actions required to create an exact copy of the current application in a target environment?

This includes the removal of the current application and data, if any, from the target environment.

- A. Replicate Snapshot
- B. Migration Export
- C. Clone Environment
- D. Migration Backup

ANSWER: C

Explanation:

Clone Environment is the Oracle Enterprise Performance Management Cloud capability designed to create a complete, like-for-like copy of a source environment in another environment. A Service Administrator initiates the operation from the source environment and selects the target environment. Oracle then automates the required lifecycle steps: it creates an export snapshot of the source, removes the target environment's existing application and associated data when necessary, imports the source snapshot, and re-creates the source application configuration in the target. This provides a controlled and efficient way to refresh a test, development, or other nonproduction environment from a current application without manually exporting, transferring, deleting, importing, and validating individual artifacts.

The feature is particularly suited to the question's requirement because the target is not merely receiving selected artifacts or a backup; it is being replaced with a full copy of the current source application. Oracle documents cloning as an environment-management operation available to Service Administrators and describes its use for copying an environment to a target environment. See the [Oracle documentation on cloning an environment](#) and the [Oracle EPM Cloud Migration overview](#).

QUESTION NO: 5

You want to set up weekly planning for 18 continuous months.

Which three options need to be selected when initially enabling features in Financials?

- A. Time Frame Granularity
- B. Rolling Forecast
- C. Weeks to Months Mapping
- D. Weekly Planning
- E. Custom Periods

ANSWER: B C D

Explanation:

Rolling Forecast, Weeks to Months Mapping, and Weekly Planning must be enabled during the initial Financials feature configuration. Weekly Planning establishes a weekly time-grain application, allowing planners to enter, calculate, and analyze plan data by week rather than solely by month. Rolling Forecast supplies the continuous forecasting capability needed to maintain an 18-month horizon as time advances. Together, these features support a weekly forecast that continues forward instead of being limited to a fixed annual planning cycle.

Weeks to Months Mapping is also required because Financials includes monthly and quarterly reporting, calculations, and aggregation requirements even when detail is entered weekly. The mapping defines the relationship between each week and its corresponding month, ensuring that weekly values aggregate consistently into the application's monthly calendar structure. This configuration is fundamental for reporting weekly plans alongside standard Financials statements and for preserving accurate period-based rollups across the continuous forecast range.

Oracle documents Weekly Planning and the related week-to-month mapping configuration as Financials capabilities, and documents Rolling Forecast as the feature used for continuously extended forecast horizons. See [Oracle Planning: About Weekly Planning](#) and [Oracle Planning: About Rolling Forecasts](#).

QUESTION NO: 6

You enabled Projects and within Projects you enabled the Program dimension so that you can group projects together into a program. Which is a post configuration task for Projects?

- A. Synchronize defaults by pushing updated data to the input forms by running the Synchronize Default business rule.
- B. Review the assumptions under Investments and Intangibles at the No Entity level and members under the Total Entity level.
- C. Modify account type and variance reporting options for members in programs.
- D. Map projects to programs for analysis purposes.

ANSWER: D

Explanation:

Map projects to programs for analysis purposes. is the required post-configuration task when the Program dimension is enabled within Projects. Enabling the dimension makes program-level grouping available in the application structure, but it does not by itself establish the business relationships between individual project members and the programs to which they belong. An administrator must map each applicable project to its corresponding program so that users can aggregate, analyze, and report project plans, costs, and performance at the program level. This mapping supports the intended portfolio view: related projects can be evaluated collectively while retaining the ability to review underlying project detail. The mapping should reflect the organization's project-management hierarchy and be maintained whenever projects are added, reassigned, or program structures change. Oracle's Planning documentation describes Projects configuration and the use of

dimensions and mappings to support project and program analysis. See the [Oracle Planning documentation library](#) and the [Projects administration documentation](#).

QUESTION NO: 7

You want to create a dashboard to provide an overview at the beginning of the planning and forecasting process. You create a dashboard with Dashboard 1.0. Which three statements are true about Dashboard 1.0?

- A. You can add hierarchical labels in charts.
- B. You can include user variables in the global PV bar and the local POV.
- C. You can switch easily between using the design environment and the runtime environment.
- D. You can include multiple forms that dynamically update, including their associated charts.
- E. You can use a logarithmic scale in relevant chart types.

ANSWER: B C D

Explanation:

Dashboard 1.0 supports interactive planning dashboards that can be tailored to users' planning context. You can include user variables in both the global POV bar and a component's local POV. This enables the dashboard and individual components to reflect member selections stored in user preferences, such as an assigned entity, scenario, or other planning dimension. A global POV can drive the context across dashboard content, while a local POV lets an individual component retain or use a more specific context.

Dashboard 1.0 also provides a straightforward transition between designing the dashboard and viewing it at runtime. This lets a designer configure dashboard layout and content, then check the user-facing behavior without leaving the dashboard workflow. In addition, a dashboard can contain multiple forms. When a user changes relevant POV selections or enters data, the forms can refresh dynamically, and charts associated with those forms can reflect the updated data. These capabilities make Dashboard 1.0 appropriate for a planning-process landing page that combines data-entry forms with visual status and trend information. Oracle documents dashboard creation, POV behavior, and dashboard components in its [Working with Dashboards](#) guide and its [Creating Dashboards](#) documentation.

QUESTION NO: 8

Which statement describes Strategic Modeling?

- A. It is used to model the flow of data by defining strategic rules for sharing data between modules.
- B. It is used to develop driver-based strategic plans and generate core financial statements.
- C. It is used to strategically manage and analyze finances at any business level with built-in dashboards.
- D. It is used to quickly model and evaluate financial scenarios, and offers out-of-the-box treasury capabilities.

ANSWER: D

Explanation:

It is used to quickly model and evaluate financial scenarios, and offers out-of-the-box treasury capabilities. Strategic Modeling is Oracle Planning's purpose-built capability for long-range financial modeling and scenario evaluation. It enables finance teams to create and compare alternative strategic outcomes efficiently, supporting decisions involving such areas as growth initiatives, capital structure, funding, acquisitions, and other long-term assumptions. Its modeling approach supports the rapid assessment of how changes in business drivers affect projected financial results over multiple periods.

A defining capability is its embedded treasury functionality. Strategic Modeling includes out-of-the-box features for modeling cash flow, debt, interest, and related financing assumptions, which allows organizations to incorporate funding and liquidity considerations directly into strategic financial plans rather than treating them as separate analyses. This combination of

flexible what-if scenario modeling and prebuilt treasury capabilities is why the statement accurately characterizes the module. Oracle positions Planning as a connected planning platform, with Strategic Modeling addressing strategic and long-range financial planning needs. See Oracle's [Planning product information](#) and the [Oracle Planning documentation library](#) for current product documentation.

QUESTION NO: 9

A Department Manager requires access to all accounts in their own department, but only a certain account in all other departments. With the usual metadata security, the Manager would have access to all accounts across all departments.

- A. Member security
- B. Artifact security
- C. Cell-level security
- D. Access control

ANSWER: C

Explanation:

Cell-level security is the appropriate feature because the required access depends on the intersection of Department and Account members. Standard member (metadata) security grants access to members within an individual dimension. Once the manager is granted access to their Department member and the required Account members, that dimension-level access can result in access to combinations that are broader than the intended business rule.

Cell-level security lets a Planning administrator define access at the precise data-cell intersection, using combinations of dimension members. The manager can therefore be granted access to every Account intersection for their own Department while being limited to only the specified Account intersection for other Departments. This supports the requirement without changing the underlying hierarchy or broadly exposing account data. The security definition can be applied through a cell-level security rule and associated with the relevant user or group, providing controlled read or write access to the authorized intersections.

Oracle documents cell-level security as a mechanism for restricting user access to specific data cells beyond regular member-level security. See the [Oracle Planning documentation](#) and Oracle's [Enterprise Performance Management Cloud documentation](#) for Planning security administration guidance.

QUESTION NO: 10

Which two features can help users create business rules?

- A. Add calculations by using preformed system templates, such as clearing data, copying data, aggregating data, and so on.
- B. Add calculations in calculation script syntax by switching to Script Mode.
- C. Design sophisticated rules that solve use cases that normal business rules cannot solve by using Groovy business rules.
- D. Rules are represented graphically in a flow chart into which you can drag and drop components to design the rule.

ANSWER: A B C D

Explanation:

All of the listed capabilities can help users create business rules in Oracle Planning through Calculation Manager. Preformed system templates provide guided building blocks for commonly required operations, including clearing, copying, and aggregating data. Script Mode supports direct authoring of calculation logic in calculation-script syntax, which is useful when a rule requires expressions or commands beyond a visual construction. Calculation Manager also provides a graphical rule designer in which rule components are represented in a flowchart and can be assembled by dragging and dropping components. Finally, Groovy business rules extend standard business-rule capabilities with programmable logic, enabling sophisticated validation, data manipulation, and runtime-driven processing scenarios. These are complementary authoring

approaches rather than mutually exclusive features: a Planning implementation can use templates for common patterns, graphical design for visual logic, scripts for calculation syntax, and Groovy for advanced custom processing. Oracle's documentation describes Calculation Manager as the environment for creating and managing Planning business rules, including graphical and script-based design, templates, and Groovy rules. See the [Oracle Calculation Manager documentation](#) and the [Oracle Planning documentation](#).

QUESTION NO: 11

Which set of steps do you perform to enable each Planning module?

- A. Enable the module and refresh the database.
- B. Run pre-configuration tasks, enable the module, and configure the module.
- C. Configure the module and refresh the database.
- D. Enable the module, configure the module, and run post-configuration tasks.

ANSWER: D

Explanation:

Enable the module, configure the module, and run post-configuration tasks is the required sequence for bringing a Planning module into use. Enabling activates the selected module's delivered capabilities and creates the module-specific artifacts needed by the application. Configuration then tailors those delivered capabilities to the organization, such as setting assumptions, defining members and drivers, loading required data, and establishing module settings. Post-configuration work completes the implementation by validating the configured module, completing any required data integration or business-rule activities, and preparing the module for planners and other users. This sequence is important because configuration depends on the artifacts created when the module is enabled, while post-configuration tasks depend on the completed configuration. Oracle's Planning documentation organizes module implementation around activation, setup, and follow-up activities so that the delivered framework is established before it is customized and finalized. See the [Oracle Planning documentation library](#) and Oracle's [Planning product overview](#) for implementation and module guidance.

QUESTION NO: 12

Which four job types can be scheduled in Planning?

- A. Promote Planning Unit
- B. Data map
- C. Import Data and Export Data
- D. Create Snapshot
- E. Refresh Database
- F. Merge Data Slices

ANSWER: B C E F

Explanation:

Planning supports scheduling operational jobs so that routine administration and data-management processes run at defined times without manual intervention. **Data map** is schedulable because a data map can run as a background data-movement process, copying data between cubes or applications according to its defined mappings. **Import Data and Export Data** are schedulable data-integration operations: imports load prepared data into Planning, while exports extract Planning data for downstream use, archival, or integration. **Refresh Database** is schedulable to deploy application changes and refresh the Planning database after metadata or structural updates. **Merge Data Slices** is also available for scheduling; it consolidates incremental data slices to support ongoing cube maintenance and help preserve efficient database operation. These job categories are managed through Planning's Jobs and job-scheduling capabilities, where administrators select a job type,

define its parameters, and assign a recurrence. Oracle documents the available scheduling workflow in its [Planning job scheduling documentation](#) and describes Planning administration and job management in the [Oracle Planning documentation library](#).