

ORACLE EPM BUDGETING
END USER TRAINING
SHELBY COUNTY



EPM = ENTERPRISE PERFORMANCE MANAGEMENT



END USER TRAINING AGENDA

INNOFIN

- System Navigation
- Using Oracle Guided Learning

Terms/Terminology/Acronyms



NAVIGATING TO BUDGET

INNOFIN

- Oracle's Planning and Budgeting Cloud Service is a Cloud based application, meaning it can be accessed from any computer with access to the internet. Open an internet browser and navigate to the Test Budget URL:

<https://budget-test-shelbycountyttn.epm.us-phoenix-1.ocs.oraclecloud.com/HyperionPlanning/>

LOGGING IN

- Click the relevant Single Sign-On button for your organization:

The link will route you to a log-in screen where you can use your email address and typical email/County password to sign in.

ORACLE Cloud
shelbycountyttn

Oracle Cloud Account Sign In

Identity domain ⓘ
Default

User Name

Password

[Forgot Password?](#)

Sign In

Or sign in with

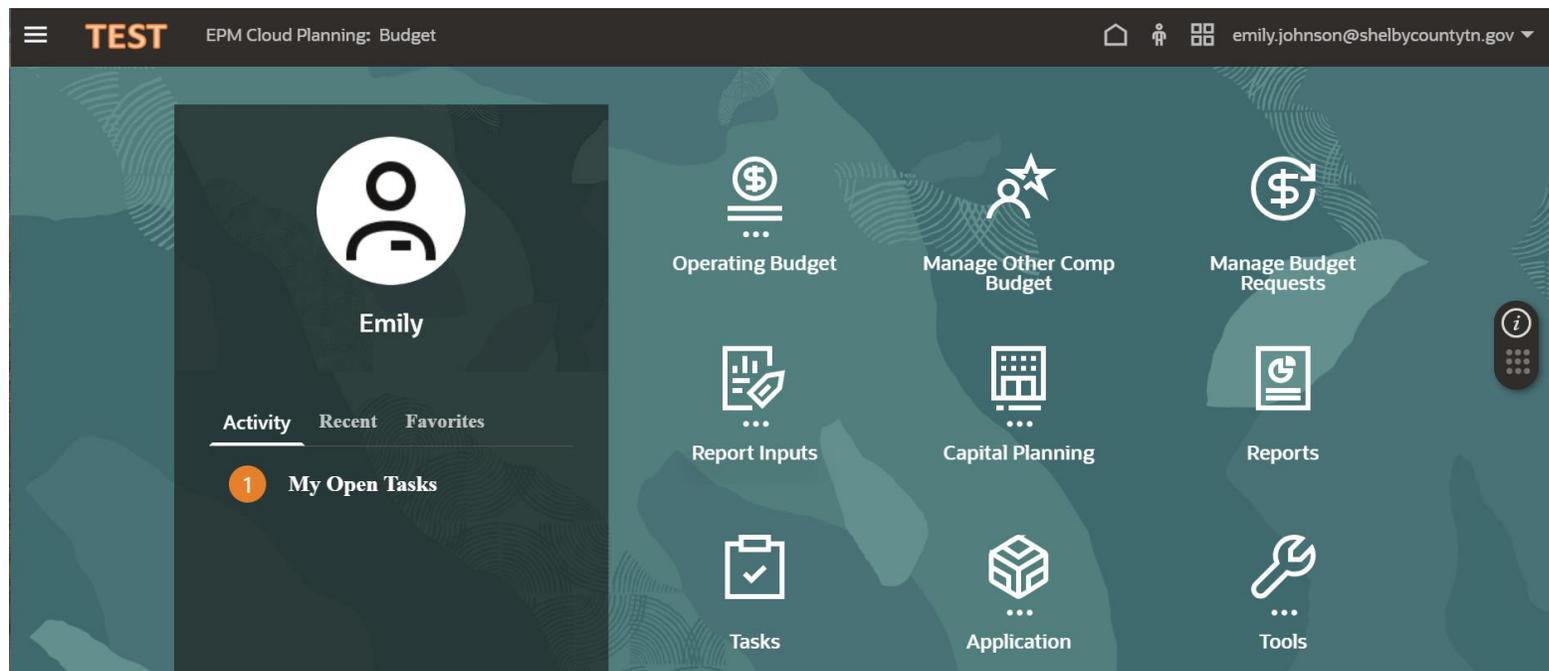
Sheriffs Azure SSO Shelby County SSO

[Need help signing in?](#)



BUDGET HOME SCREEN

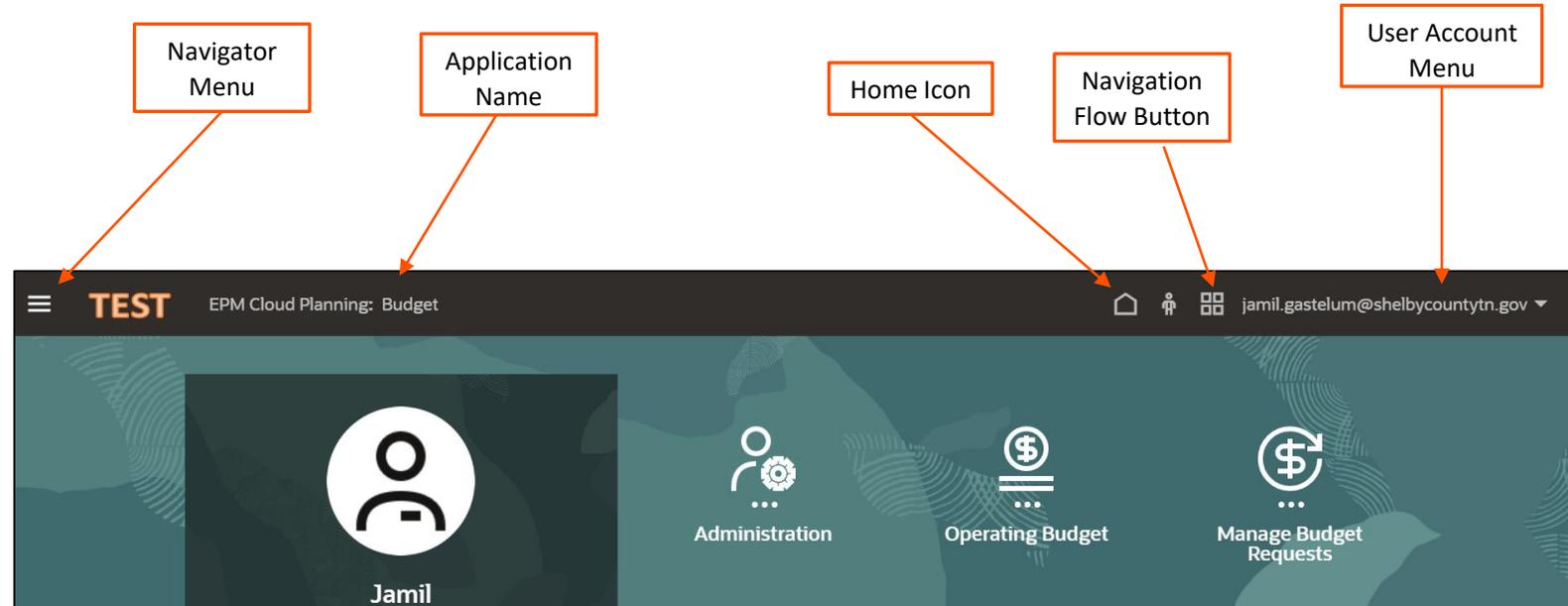
- Once logged in, you will see the Home Screen
- Your Home Screen displays icons/cards made up of business processes and application tools you can access
- Based on your roles and responsibilities, you may see some or all the icons displayed below





HOME PAGE NAVIGATION

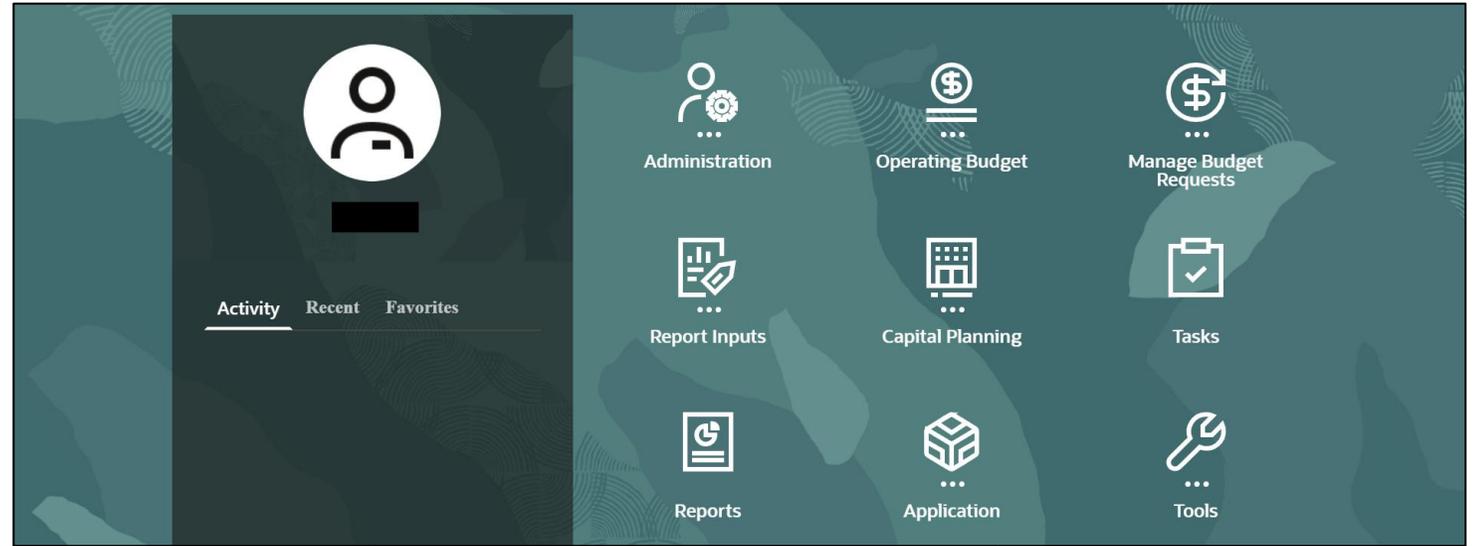
- Navigator Menu – lists all the features a user can access
- Application Name – displays the name of the application the user is logged into
- Home Icon – return to home page
- Account Menu – displays the user’s name and contains links to Help, Downloads, and Sign Out





HOME PAGE NAVIGATION

- Messages and Quick Links – multi-use area for administrative messages and links to recent items and favorites
- Icons– Shortcuts that link to features in the system. Icons with dots underneath them represent groups of features under a common business process



Messages and Quick Links

Menus/
Task Manager



HOME PAGE NAVIGATION

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- Do not use the forward or backward arrows in your browser to navigate between pages within Budget
- To Navigate to the Home Screen at any time, select the **Home Icon** next to your username in the upper right corner of the webpage





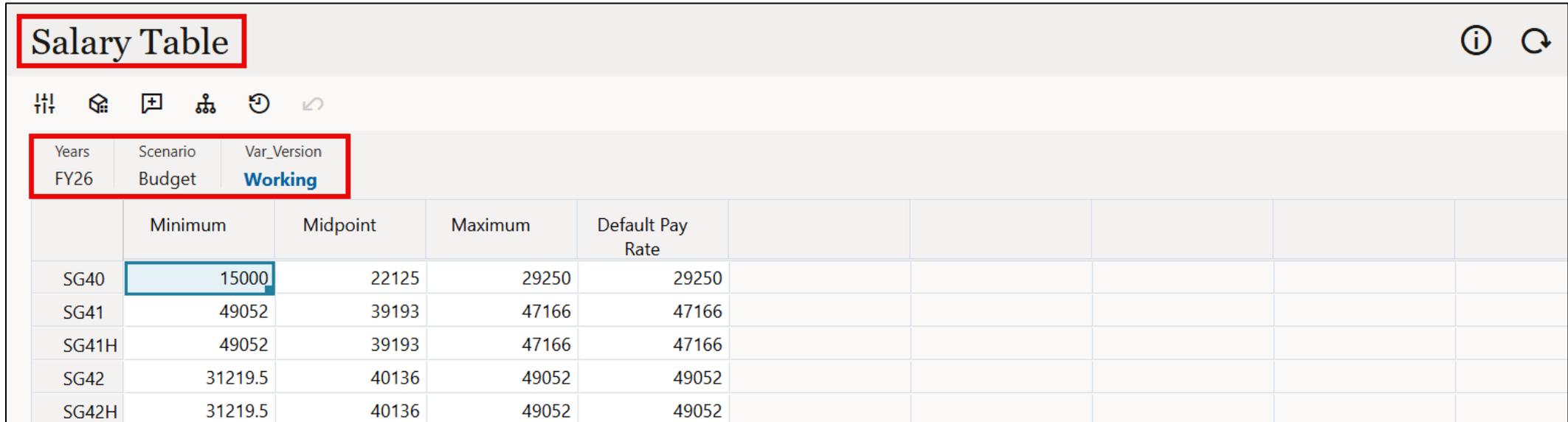
WEB FORM NAVIGATION

- Web forms can be accessed from the Icons on the home screen
- Icons with dots (aka Clusters in OGL) – contain a group of features under a common business process
- Icons below – contain one or more forms, or other artifacts



SIMPLE FORM

- When users select an Icon containing a Simple Form, the form displays across the screen
- On all Forms:
 - Title is displayed in the top left
 - Point of View is displayed across the top



Salary Table (i) ↻									
☰ 🏠 + 👤 ↻ ↶									
Years	Scenario	Var_Version							
FY26	Budget	Working							
	Minimum	Midpoint	Maximum	Default Pay Rate					
SG40	15000	22125	29250	29250					
SG41	49052	39193	47166	47166					
SG41H	49052	39193	47166	47166					
SG42	31219.5	40136	49052	49052					
SG42H	31219.5	40136	49052	49052					



EXPAND AND COLLAPSE ROWS AND COLUMNS

- The > icon/symbol expands columns to view or enter data at a lower level
- The ^ icon/symbol collapses columns to view or enter data at a higher level

Manage In Process Requests

⌵ ⌶ ⌷ ⌸ ⌹ ⌺

Years	Scenario	Version	Var_Org			
FY26	Budget	In Process	1ZZZZZ - ALL ORGANIZATION	Request Creation Date	40ZZ - REVENUE	50ZZ - EXPENSES
				BegBalance	▶ Total	Recurring One-Time ▶ Total
100101 - ROAD RESURFACING	Request 5	10/31/24				
100102 - DRAINAGE IMPROVEMENTS	Request 2		560	500	10	510
100103 - SPRING LAKE SEWERS	Request 3					
300103 - REAL ESTATE	Request 4	10/31/24				



FORMS – POINT OF VIEW MEMBER SELECTIONS

- Users make selection(s) for members in **blue font** by clicking on the **hyperlink** in the point of view
- Only members with **blue font** may be changed
- In this example, the Organization can be selected
- When a user variable is used in the point of view, the selection for the user variable can be changed
 - Var_Org is a user variable that can be updated in this example

Manage In Process Requests							
⌵ ⏏ ⛶ ⚙ ⌛ ↶							
Years	Scenario	Version	Var_Org				
FY26	Budget	In Process	1ZZZZZ - ALL ORGANIZATION				
			Request Creation Date	40ZZ - REVENUE	50ZZ - EXPENSES		
			BegBalance	▶ Total	Recurring	One-Time	▾ Total
100101 - ROAD RESURFACING		Request 5	10/31/24				
100102 - DRAINAGE IMPROVEMENTS		Request 2		560	500	10	510
100103 - SPRING LAKE SEWERS		Request 3					
300103 - REAL ESTATE		Request 4	10/31/24				



MEMBER SELECTOR

- In the member selector, drill down the member hierarchy
- Ensure the selected member has a blue check mark
- Click OK
- The form will automatically refresh and filter data to the updated selection

Select Members

Var_Org

Search

Organization

Total Organization

1ZZZZ - ALL ORGANIZATION

- 100000 - CAPITAL PROJECTS
- 200000 - ADMINISTRATION & FINANCE
- 250000 - INFORMATION TECHNOLOGY SE...
- 270000 - PLANNING & DEVELOPMENT
- 280000 - GENERAL SERVICES
- 300000 - PUBLIC WORKS
- 350000 - CORRECTIONS
- 400000 - HEALTH SERVICES

Selections

Organization

1ZZZZ - ALL ORGANIZATION

OK Cancel

Members 1 Selected



MEMBER SELECTOR - SEARCH

- The user can also search for a member in the Member Selector.
- A partial string of the member (number) or member alias can be used to see both number and name
- Once the search results are returned, click on the member you want
- Ensure the check mark turns blue, then click the OK button
- The form will automatically refresh and filter data to the updated selection

Select Members

Var_Org ▾

administration ✕

Result	Info
<input type="checkbox"/> 200000 - ADMINISTRATIO...	Organization > Total Orga...
<input type="checkbox"/> 200301 - CAO-ADMINISTR...	Organization > Total Orga...

Selections

Organization

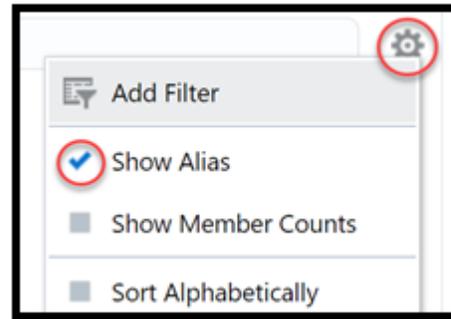
1ZZZZZ - ALL ORGANIZATION

OK Cancel



VIEW ALIAS IN SELECTOR

- On any reports or dropdown selections where only numbers are showing rather than name, click the gear icon to the right, and select "Show Alias" (shows Account Number and Name)





ACTION MENU

- Forms (aka Spreadsheet) may contain 'Action Menus' that can be accessed by right clicking on the form
- Action Menus enable users to navigate to other forms or launch business rules
- Where the user right clicks is important for some Action Menus
- When right clicking on specific lines those members are relayed to the next action
- Click in the white space at the top of the form to exit out

The screenshot displays the 'Manage In Process Requests' interface. At the top, there are navigation icons and a header bar with the following fields: Years (FY26), Scenario (Budget), Version (In Process), and Var_Org (1ZZZZZ - ALL ORGANIZATION). Below this is a table with columns for Request Priority and Request Title. The table contains four rows of data:

Request Priority	Request Title
Request 5	100101 - ROAD RESURFACING
Request 2	100102 - DRAINAGE IMPROVEMENTS
Request 3	100103 - SPRING LAKE SEWERS
Request 4	300103 - REAL ESTATE

A context menu is open over the first row, listing the following actions:

- Add Budget Request
- Delete Budget Request
- Edit Budget Request
- Submit Budget Request
- Edit
- Adjust
- Comments
- Line Item Details
- Lock/Unlock Cells
- Show Member In Outline



BREADCRUMBS

- Actions that navigate to a new form will create a trail of additional horizontal tabs at the bottom of the screen
- Selecting the 'x' on the current form tab will return users to the previous form
- **Please do not use the browser back button**

Budget Request Text

⌵ 🏠 + 👤 ⌛ ↶

Years	Scenario	Organization	Requests
FY26	Budget	S100101	Request 5

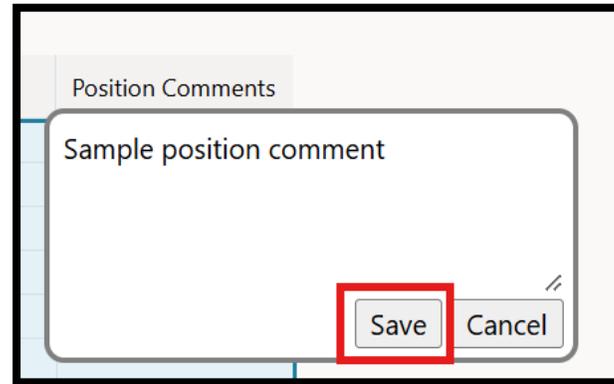
	BegBalance
Request Title	Test Request
Request_Description_Input	
Request_Created_By	michael.kosior@shelbycountytn.gov
Request_Date_Created	10/31/24
Strategic Plan	
Level of Need	
Statutory Requirement	
Contractual Obligation	
Unavoidable	
Additional_Detail	
Budget_Comments	
Attachments	

In Process Budget Request Text Submitted

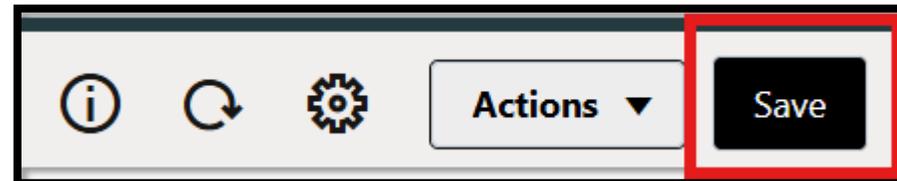


SAVING TEXT FIELDS

- When completing a text field such as a comment, first click **Save** on the comment box to dismiss/close.



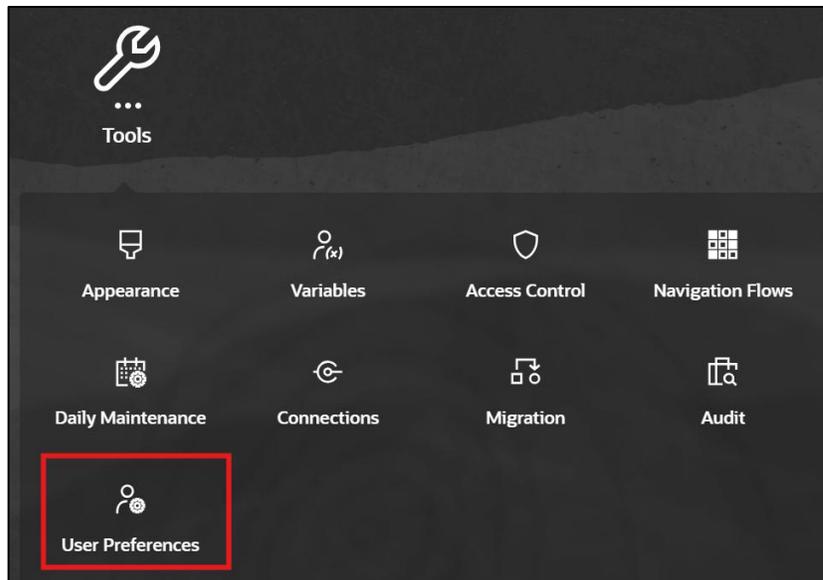
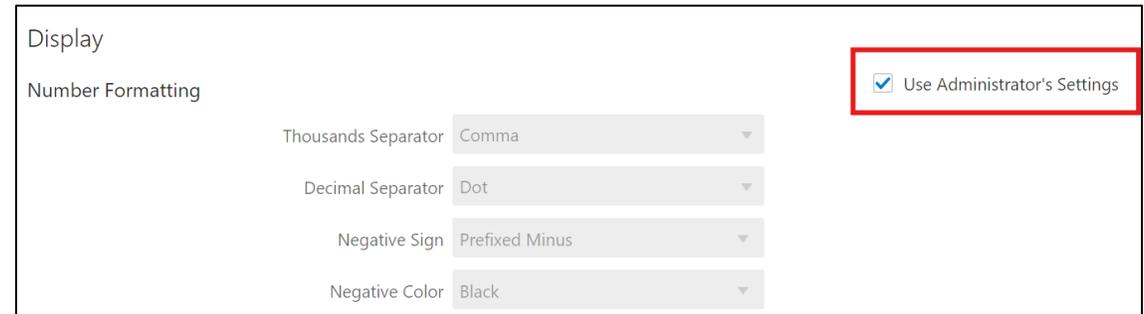
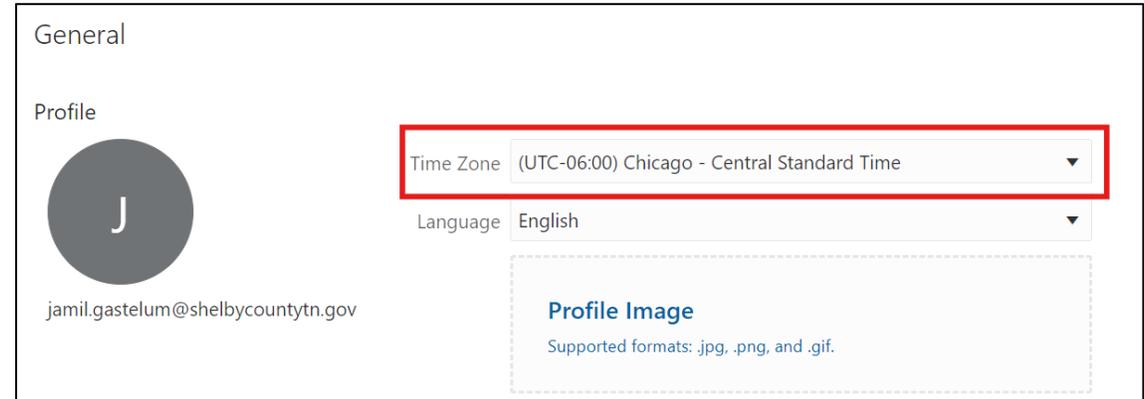
- Next, click **Save** on the form to submit the information.





USER PREFERENCES

- User Preferences allows you to set different options that only apply to yourself
- Options include setting Time Zone, Number Formatting, Notifications, etc.
- **Please update your time zone and select “Use Administrator’s Settings” for General, Display, and Notification settings**



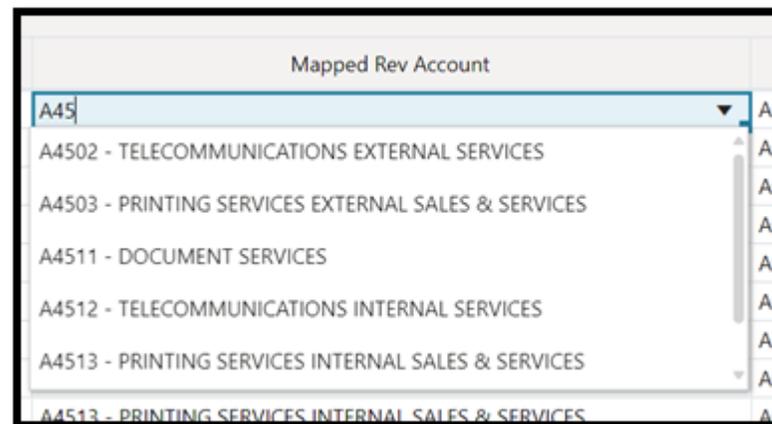


OTHER NAVIGATION TIPS

- To search a form, use Ctrl + F or the magnifying glass icon to the left of Actions:



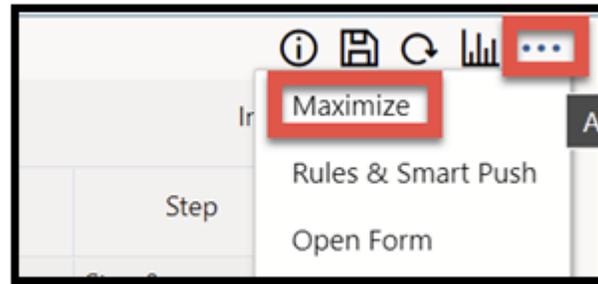
- To search Smart Lists within a form, click on a cell within the form that utilizes Smart Lists. This can be noticed upon clicking an editable cell, when a dropdown menu will appear below the cell with preset options to choose from. To search within the Smart List assigned to this particular cell, begin typing the name of the member you would like to enter. If the member exists within the Smart List, the options will filter as you type until either the member itself comes up or the selection list becomes empty.





NAVIGATING DASHBOARDS

- To navigate a dashboard (a screen displaying multiple forms at once), keep in mind that the dashboard is intended to provide you information in one screen that works together. To maximize a particular form within the dashboard, hover in the top right corner of that section until three dots appear. Click the dots, then click Maximize.



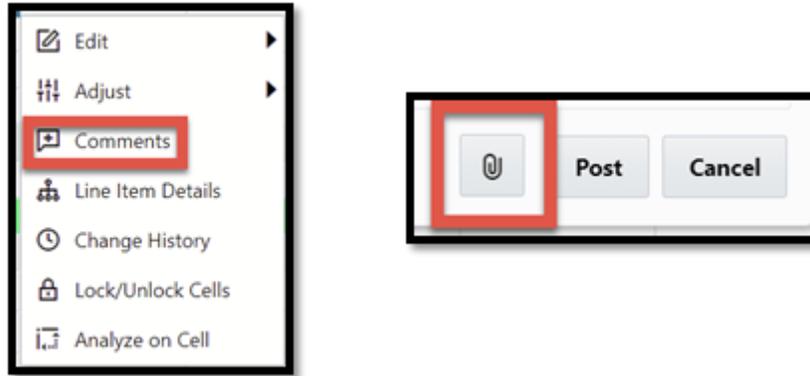
- To return to the dashboard showing all forms, hover again in the top right corner, click the three dots that appear, then click Restore.



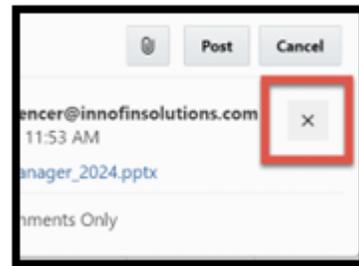


ADDING ATTACHMENTS

- To upload attachments directly to a particular cell, right click and select Comments, then click the paperclip icon in the pop-up window that appears. After selecting a file, click Post.



- To delete an attachment after you have uploaded it, click the X that appears to the right of your username.





NOTE ON SECURITY

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- Application security has been granted based on Section/Department/Division. If you do not have access to all sections needed, please contact your Budget analyst and/or IT Support

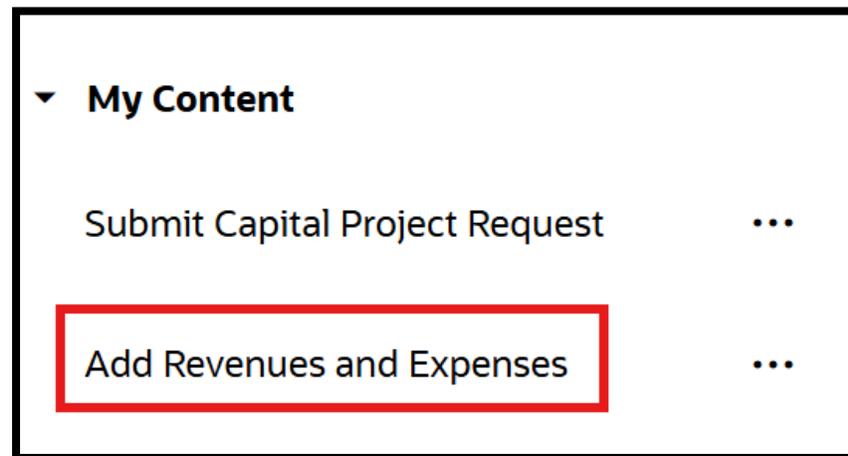


USING ORACLE GUIDED LEARNING

- After logging in to the application, you will see the following icon on the right side of the page:



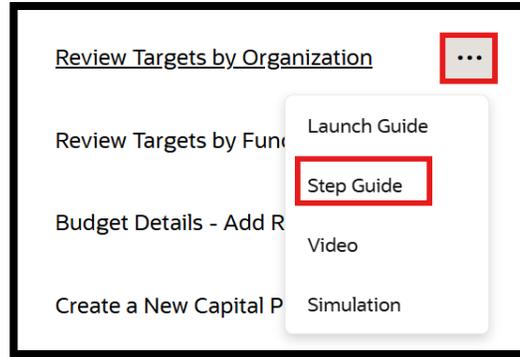
- This widget contains embedded instructions for all budgeting processes. It can be moved anywhere on the screen. Click the "i" to view available guides. Use the Search field to search for a specific guide, or navigate through the list. Click directly on a guide name to launch step by step directions.





USING ORACLE GUIDED LEARNING

- Alternatively, click the three dots to the right of any guide name to see more format options.



- Click Step Guide to see all steps in one place. You may toggle on or off screenshots, or open the guide in a new window.

Show Screenshots 

Review Targets by Organization



USING ORACLE GUIDED LEARNING

- At the bottom of the guide, use buttons to print steps or email a copy. Click Exit when you are finished.

Print Invisible Steps   Exit



WHICH SYSTEMS SHOULD I BE USING?

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- Oracle EPM Budget is the system for creating your FY26 budget and is forward-looking to the next fiscal year.
- Current year budget amendments should still be completed in TeamBudget for the remainder of FY25.



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THANK YOU