



CAREER MIGRATION GUIDE

Oracle Fusion ERP → Oracle EPM

A hands-on transition guide for Fusion Financials, HCM, Projects, COA and Integration professionals

REUSE

Finance & ERP knowledge

BUILD

EPM modeling & rules

TARGET

Functional → Architect

BISP Trainings • Student / Consultant Edition

1. Why Move from Oracle Fusion ERP to Oracle EPM?

Oracle Fusion ERP and Oracle EPM solve different but complementary parts of the finance lifecycle. Fusion ERP is primarily where transactions, subledger accounting, journals, ledgers and operational finance are recorded. Oracle EPM takes governed financial and operational data into planning, forecasting, consolidation, reconciliation, allocation, master-data governance and management reporting.

Migration principle: you are not starting again. Your Fusion vocabulary—ledger, legal entity, natural account, cost center, currency, period, journal, intercompany and source-system controls—becomes the foundation for EPM dimensional modeling and finance process design.

Fusion strength you already have	How it transfers to EPM	New capability to learn
Fusion GL / Financials	Actuals, COA, Entity, Account, Period, Currency	Planning/FCCS dimensional design and finance process orchestration
AP / AR	Transactions, counterparties, balances	ARCS reconciliation and transaction matching
HCM	Employee, job, grade, compensation data	Workforce Planning
Fixed Assets	Asset classes, depreciation, capital projects	CapEx Planning
Project Financials	Project cost/revenue and resource data	Project Planning / profitability
COA / Enterprise Structures	Hierarchy and segment governance	EDMCS viewpoints, node types, requests and subscriptions
OIC / REST / Integration	APIs, orchestration, error handling	EPM Data Integration, REST APIs, EPM Automate, pipeline support

2. ERP vs EPM — The Mental Model Shift

Business question	Fusion ERP emphasis	Oracle EPM emphasis
What happened?	Transactions, accounting entries, balances	Consume Actuals and compare against plan/forecast
What will happen?	Operational commitments / source data	Budget, forecast, scenarios and what-if modeling
How did the group perform?	Ledger/legal-entity accounting	Consolidation, translation, eliminations and ownership
Are balances trusted?	Accounting controls	Reconciliation, certification and transaction matching
Where is profit made?	Recorded revenue and cost	Allocations and profitability analysis
Who owns hierarchy changes?	ERP enterprise structures	Cross-application master-data governance with EDMCS

3. Oracle Fusion → Oracle EPM Product Mapping

Fusion background	Primary EPM destination	Why it is a natural move	Example project
GL / Financials	Planning + FCCS	Strong finance, COA, Actuals and close knowledge	Fusion Actuals → rolling forecast; TB → consolidation
AP / AR	ARCS	Balance and transaction knowledge	AP/AR reconciliation and matching
HCM	Planning Workforce	Employee and compensation drivers	Headcount, salary, benefits and workforce forecast
Fixed Assets	Planning CapEx	Asset/depreciation understanding	CapEx request, depreciation and

			cash-flow planning
Projects	Planning / EPCM	Project economics and cost drivers	Project forecast or profitability
COA / Structures	EDMCS	Hierarchy governance experience	Fusion Cost Center → Planning/PCMCS hierarchy synchronization
Integration / OIC	Data Integration + EPM automation	Technical transferability	Fusion extract → EPM load → validation → rule → notification
Financial Reporting	Narrative Reporting	Management reporting knowledge	Actual + Plan + narrative board package

4. End-to-End Enterprise Architecture

FUSION ERP
GL / AP / AR / FA

INTEGRATION
Extract / Map /
Validate

EPM
Planning / FCCS /
ARCS

REPORTING
Smart View / Reports

DECISION
FP&A / Controller

Data flow: Fusion Actuals / master data → mapping and validation → EPM finance process → governed reporting → management decision.

5. What You Must Learn in Oracle EPM

Capability	Fusion professional's starting point	EPM learning target	Hands-on outcome
Multidimensional model	COA segments and enterprise structures	Dimensions, members, hierarchies, POV and intersections	Design Account/Entity/Department/Scenario/Version/Time
Planning	Budget interface / source data familiarity	Drivers, forms, rules, workflow, forecast seeding	Build departmental expense forecast
Consolidation	Ledgers, journals, currencies	FCCS translation, eliminations, ownership, consolidation	Reconcile Fusion TB to FCCS
Data Integration	Extracts/APIs/OIC	Import formats, mappings, period mapping, load rules, reconciliation	Load Fusion GL Actuals to Planning
Calculations	ERP accounting logic	Business rules, Essbase concepts, Groovy scope	Build driver-based forecast rule
Security	ERP roles/data access	EPM roles + dimensional data access	Department manager security
Reporting	OTBI/BI Publisher/financial reports	Smart View, dashboards, Management/Narrative Reporting	Actual vs Budget vs Forecast report
Operations	ESS jobs and integration monitoring	Job Console, logs, automation, reruns, close support	Create operational runbook

6. 90-Day Career Migration Roadmap

Period	Learning focus	Hands-on deliverable	Interview outcome
Weeks 1–2	EPM architecture, FP&A, close,	ERP vs EPM process map	Explain why EPM exists

	consolidation concepts		
Weeks 3–4	Planning dimensions, forms, dashboards, Smart View	Mini Planning model	Explain dimensional design
Weeks 5–6	Fusion GL → EPM Data Integration	Actuals load with mappings and reconciliation	Explain source-to-target integration
Weeks 7–8	Rules, drivers, forecast seeding, variance	Expense forecast calculation	Explain rule design and controls
Weeks 9–10	FCCS, ARCS, PCMCS/EPCM, EDMCS overview	Cross-product solution map	Choose correct EPM product for a requirement
Week 11	Security, UAT, performance and support	Test pack + support runbook	Answer production scenarios
Week 12	Capstone + documentation + mock interview	End-to-end Fusion → Planning solution	Tell a complete project story

7. Hands-On Capstone: Fusion GL Actuals → Oracle Planning

Business scenario: A multi-entity organization prepares departmental forecasts in spreadsheets. Actuals are held in Fusion GL. Finance wants centralized monthly Actual, Budget and Forecast reporting, driver-based forecasting, workflow, security and variance analysis.

7.1 Requirements

Requirement	Design response
Load monthly Actuals	Fusion GL balances by Entity, Cost Center, Account and Period
Rolling Forecast	Department owners forecast future periods from controlled Actual/Budget baselines
Driver planning	Travel growth, inflation, rent escalation, headcount and cost-per-employee drivers
Workflow	Department submit → FP&A review → approve/reject
Security	Department managers restricted to assigned departments; FP&A enterprise access
Reporting	Actual/Budget/Forecast, variance, variance %, trends and comments
Automation	Scheduled load, validation, calculations, status checks and notification

7.2 Planning Model

Dimension	Examples	Design purpose
Account	Salary, Travel, Rent, IT, Marketing	Expense planning and financial reporting
Entity	India, US, UK	Legal/management reporting
Department	Finance, Sales, HR, IT	Budget ownership; mapped from Fusion Cost Center
Scenario	Actual, Budget, Forecast	Historical vs forward-looking data
Version	Working, Final	Planning iteration and approval state
Year / Period	FY27; Jan–Dec	Time horizon

7.3 Fusion-to-Planning Mapping

Fusion source	Planning target	Example	Control
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Natural Account	Account	610100 → Travel	Unmapped accounts rejected/reviewed
Cost Center	Department	CC_2100 → IT	Governed mapping; EDMCS where applicable
Company / balancing segment	Entity	IN01 → India	Explicit mapping
Accounting Period	Period / Year	Aug-26 → Aug / FY26	Period mapping validation
Accounted Amount	Actual data	125,000	Source/stage/target reconciliation

7.4 Calculation Design

Forecast Seed = Latest Actual or approved Budget baseline
 Travel Forecast = Prior Period Actual × (1 + Travel Growth %)
 Rent Forecast = Prior Rent × (1 + Rent Escalation %)
 IT Forecast = Headcount × IT Cost per Employee
 Variance = Forecast - Budget
 Variance % = IF(Budget ≠ 0, Variance / Budget, 0)

7.5 Integration and Reconciliation Flow

Step	Student action	Evidence
1. Extract	Obtain Fusion GL Actuals at agreed grain	Source extract / control total
2. Import	Stage data in EPM Data Integration	Import status and record count
3. Map	Apply Account, Entity, Department and period mappings	Mapping report / exceptions
4. Validate	Resolve unmapped/invalid members	Validation log
5. Export	Load to Planning Actual scenario	Export job status
6. Reconcile	Compare Fusion → stage → Planning totals by Entity/Period	Signed reconciliation
7. Calculate	Run forecast/variance rules only after successful reconciliation	Rule job log
8. Report	Validate forms and Smart View output	UAT evidence

8. Production Support Mindset

Incident	Investigation path	Good support behavior
Nightly load failed	Identify extraction/connectivity/mapping/validation/export stage	Correct root cause, rerun safely, reconcile, communicate impact
Job says Success; numbers wrong	Compare source/stage/target, POV, mapping, signs, periods and calc status	Trace known accounts end-to-end
Forecast rule slow	Review scope, dimensionality, FIX logic, data volume, sequencing and dynamic Groovy scope	Measure before/after tuning
User sees wrong departments	Review role and dimensional data access	Test with persona-based access
New Fusion cost center rejected	Check target member/hierarchy and mapping governance	Use controlled metadata/mapping process rather than ad-hoc fix

9. Interview Preparation — 20 Migration Questions

#	Interview question	Strong answer direction
1	How is Fusion ERP different from Oracle EPM?	ERP records transactions/accounting; EPM plans, consolidates, reconciles, allocates, governs dimensions and reports performance.
2	Why is Fusion Financials experience valuable in EPM?	COA, ledger, entity, account, currency, period, journal and intercompany knowledge transfers directly into EPM design.
3	Design Fusion GL → Planning Actuals integration.	Define grain → dimensions → mappings → import → validate → export → reconcile → automate.
4	How would you design Department Expense Planning?	Dimensions, Actual load, assumptions, input forms, driver rules, security, workflow and variance reporting.
5	What is forecast seeding?	Controlled initialization of future forecast periods from Actual/Budget/prior Forecast without overwriting protected history.
6	What mappings are typical?	Natural Account→Account, company→Entity, Cost Center→Department, source period→Period/Year.
7	How do you prove a load is correct?	Control totals/record counts at source, stage and target plus rejected/unmapped review.
8	How would you automate nightly Actuals?	Orchestrate extract, load, status polling, reconciliation, downstream rules and notifications with safe reruns.
9	Why might FCCS be needed with Fusion?	For governed group consolidation, translation, eliminations, ownership and consolidated reporting.
10	How do you reconcile Fusion TB with FCCS?	Compare at pre-consolidation intersections, then separately explain translation/elimination/consolidation movements.
11	Where does ARCS fit?	Fusion supplies balances/transactions; ARCS controls reconciliation, certification and matching.
12	How does Fusion complement PCMCS/EPCM?	Fusion supplies costs/revenue/drivers; profitability applies allocation logic and analyzes destinations.
13	Why should a Fusion COA consultant learn EDMCS?	To govern cross-application nodes, properties, hierarchies, requests and synchronization.
14	When use Planning instead of ERP forecasting?	When multidimensional scenarios, drivers, workflow, versions and what-if analysis are required.
15	How would you secure Department Planning?	Roles plus dimensional data access; protect Actual and approved intersections.
16	A load fails during forecast close—what next?	Find failed stage, fix root cause, rerun safely, reconcile and assess downstream impact.
17	A job succeeds but numbers are wrong—what next?	Separate technical success from business reconciliation and trace known intersections.
18	How do you run an FP&A requirement workshop?	Process/calendar, grain, dimensions, drivers, data sources, workflow, reports, security, pain points and acceptance criteria.
19	How do you explain dimensional modeling to an ERP stakeholder?	Organize finance data by Account/Entity/Department/Scenario/Version/Time so it can be entered, calculated and analyzed from multiple perspectives.

20	Explain your capstone in five minutes.	Business problem → architecture → dimensions → integration → forms/rules → security/workflow → reconciliation/testing → automation → outcome.
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10. Career Positioning

Target role	What to demonstrate	Best evidence
EPM Functional Consultant	Requirements, finance process, dimensions, forms, workflow, UAT and reporting	Planning capstone + workshop artifacts
EPM Techno-Functional Consultant	Functional depth plus rules, integration, automation and troubleshooting	Fusion→EPM integration + calculation + runbook
EPM Solution Architect	Cross-product architecture, governance, scalability and production controls	Planning/FCCS/ARCS/EDMCS solution map + design decisions

11. Student Completion Checklist

- ☐ I can explain ERP vs EPM without confusing their responsibilities.
- ☐ I can map my Fusion module experience to at least two EPM products.
- ☐ I can design a basic Planning dimensional model.
- ☐ I can explain Fusion GL → EPM Data Integration with mappings and reconciliation.
- ☐ I can build/explain one driver-based forecast rule.
- ☐ I can describe security, workflow, UAT and production support.
- ☐ I can explain where FCCS, ARCS, PCMCS/EPCM and EDMCS fit.
- ☐ I can present the capstone as a five-minute end-to-end project story.

12. BISP Trainings — Suggested Learning Path

Recommended sequence: Oracle EPM Foundation → Planning → Data Integration → Smart View/Reporting → Business Rules/Groovy → FCCS/ARCS/PCMCS/EDMCS awareness → Automation → Capstone → Mock Interview.

Use the companion interactive career portal for product mapping, skill-gap assessment, animated migration flow, capstone practice and interview questions.