

Oracle® Fusion Cloud EPM

Features with AI



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Contents

Documentation Accessibility

Documentation Feedback

1 Discovering AI Capabilities in Cloud Enterprise EPM and Cloud EDM

2 AI Features for Cloud Enterprise EPM and Cloud EDM

AI Features for Account Reconciliation	1
AI Features for Enterprise Data Management	1
AI Features for Enterprise Profitability and Cost Management	1
AI Features for Financial Consolidation and Close	2
AI Features for FreeForm	2
AI Features for Narrative Reporting	2
AI Features for Planning	2
AI Features for Tax Reporting	3

3 EPM Assistants for Cloud Enterprise EPM and Cloud EDM

EPM Assistants for Account Reconciliation	1
EPM Assistants for Enterprise Profitability and Cost Management	1
EPM Assistants for Financial Consolidation and Close	1
EPM Assistants for FreeForm	2
EPM Assistants for Narrative Reporting	2
EPM Assistants for Planning	2
EPM Assistants for Tax Reporting	2
EPM Assistants for Task Manager	2

4 AI Feature Enhancements

PCM Agent Enhancements	1
IPM Insights Enhancements	1

Auto Predict Enhancements	2
Advanced Predictions Enhancements	3
Predictive Planning Enhancements	3
Predictive Cash Forecasting Enhancements	4
Notes Summarization with GenAI Enhancements	4
Generative AI for Management Reporting Narratives Enhancements	5

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1

Discovering AI Capabilities in Cloud Enterprise EPM and Cloud EDM

This guide summarizes the AI features supported across Oracle Enterprise Performance Management Enterprise Cloud Service and Oracle Enterprise Data Management Cloud Service. Refer to this guide when answering questions about AI features and capabilities, including what AI features are available to all Oracle Enterprise Performance Management Enterprise Cloud Service and Oracle Enterprise Data Management Cloud Service customers and which features require [AI Agent Studio for Oracle Fusion Cloud Applications](#).

Oracle Fusion Cloud EPM has delivered AI capabilities in production since 2015, beginning with predictive capabilities such as Monte Carlo Simulations and expanding across Predictive Planning, Auto Predict, IPM Insights, GenAI narratives, and AI Assistants. This evolution reflects Oracle's mature approach to AI for Finance: practical intelligence embedded in EPM workflows, grounded in trusted enterprise data, and designed to help teams plan, forecast, analyze, report, and act with confidence.

AI types include:

- [Predictive AI](#) : Uses statistical ML models to identify patterns in training data and make predictions on new data.
- [GenAI](#): Uses large language models (LLMs) and multimodal AI models to generate text and media content based on input instructions and context data.
- [EPM Assistants](#): Enable Service Administrators to download AI Agent templates for integrating Cloud Enterprise EPM or Cloud EDM with Fusion AI Agent Studio. For example, they can integrate with Fusion AI Agent Studio and provide a chat-based experience.

Note

To use EPM Assistants, you must have the Oracle Enterprise Performance Management Enterprise Cloud Service or Oracle Enterprise Data Management Cloud Service plus a Fusion Applications environment with [AI Agent Studio](#).

In this guide:

- [AI Features for Cloud Enterprise EPM and Cloud EDM](#)
- [EPM Assistants for Cloud Enterprise EPM and Cloud EDM](#)
- [AI Feature Enhancements](#)

2

AI Features for Cloud Enterprise EPM and Cloud EDM

Refer to this section when answering questions about AI features available to all Oracle Enterprise Performance Management Enterprise Cloud Service and Oracle Enterprise Data Management Cloud Service customers. For example, these AI features may have GenAI or Predictive capabilities for the business process.

These features do not require a [Fusion Apps subscription](#) with [Agent Studio](#).

- [AI Features for Account Reconciliation](#)
- [AI Features for Enterprise Data Management](#)
- [AI Features for Enterprise Profitability and Cost Management](#)
- [AI Features for Financial Consolidation and Close](#)
- [AI Features for FreeForm](#)
- [AI Features for Narrative Reporting](#)
- [AI Features for Planning](#)
- [AI Features for Tax Reporting](#)

AI Features for Account Reconciliation

Feature	AI Type	Release	Enhancements
Reconciliation Assignment Assistance	Predictive	25.12	
Transaction Matching Assistance	Predictive	25.12	

AI Features for Enterprise Data Management

Feature	AI Type	Release	Enhancements
Change Management AI Assistant	GenAI	26.06	
Application Registration Assistant: Generate Properties	GenAI	25.12	

AI Features for Enterprise Profitability and Cost Management

Feature	AI Type	Release	Enhancements
Reporting Agent	GenAI	26.07	
PCM Agent	GenAI	25.05	PCM Agent Enhancements
IPM Insights	Predictive and GenAI	24.08	IPM Insights Enhancements

AI Features for Financial Consolidation and Close

Feature	AI Type	Release	Enhancements
Reporting Agent	GenAI	26.07	
Consolidation Job Analytics	GenAI	25.07	
IPM Insights	Predictive and GenAI	25.07	IPM Insights Enhancements

AI Features for FreeForm

Feature	AI Type	Release	Enhancements
Reporting Agent	GenAI	26.07	
Advanced Predictions	Predictive	25.08	Advanced Predictions Enhancements
Auto Predict	Predictive	24.09	Auto Predict Enhancements
IPM Insights	Predictive and GenAI	24.09	IPM Insights Enhancements
Predictive Planning	Predictive	24.09	Predictive Planning Enhancements
Bring Your Own ML	Predictive	21.11	

AI Features for Narrative Reporting

Feature	AI Type	Release	Enhancements
Reporting Agent	GenAI	26.07	
Notes Summarization with GenAI	GenAI	25.08	Notes Summarization with GenAI Enhancements
Generative AI for Management Reporting Narratives	GenAI	24.10	Generative AI for Management Reporting Narratives Enhancements

AI Features for Planning

Feature	AI Type	Release	Enhancements
Reporting Agent	GenAI	26.07	
Advanced Predictions	Predictive	25.08	Advanced Predictions Enhancements
Predictive Cash Forecasting	Predictive	24.04	Predictive Cash Forecasting Enhancements
Bring Your Own ML	Predictive	21.11	
IPM Insights	Predictive and GenAI	21.11	IPM Insights Enhancements
Auto Predict	Predictive	20.08	Auto Predict Enhancements
Predictive Planning	Predictive	16.12	Predictive Planning Enhancements
Monte Carlo Simulations	Predictive	15.08	

AI Features for Tax Reporting

Feature	AI Type	Release	Enhancements
Reporting Agent	GenAI	26.07	
Return to Accrual (RTA) Automation AI Assistant	GenAI	26.05	
IPM Insights	Predictive and GenAI	25.02	IPM Insights Enhancements

3

EPM Assistants for Cloud Enterprise EPM and Cloud EDM

Refer to this section when answering questions about EPM Assistants that enable Service Administrators to download AI Agent templates for integrating Cloud Enterprise EPM or Cloud EDM with Fusion AI Agent Studio. For example, they can integrate with Fusion AI Agent Studio and provide a chat-based experience.

To use EPM Assistants, you must have the Oracle Fusion Cloud EPM service or Oracle Fusion Cloud Enterprise Data Management service plus a Fusion Applications environment with [AI Agent Studio](#).

- [EPM Assistants for Account Reconciliation](#)
- [EPM Assistants for Enterprise Profitability and Cost Management](#)
- [EPM Assistants for Financial Consolidation and Close](#)
- [EPM Assistants for FreeForm](#)
- [EPM Assistants for Narrative Reporting](#)
- [EPM Assistants for Planning](#)
- [EPM Assistants for Tax Reporting](#)
- [EPM Assistants for Task Manager](#)

EPM Assistants for Account Reconciliation

Feature	AI Type	Release
Account Reconciliation AI Assistants	Agent	26.06

EPM Assistants for Enterprise Profitability and Cost Management

Feature	AI Type	Release
EPM Activity Reports Assistant for Administrators	Agent	26.07
PCM Calculation Assistant	Agent	26.07
PCM Interrogation Assistant	Agent	26.05

EPM Assistants for Financial Consolidation and Close

Feature	AI Type	Release
EPM Activity Reports Assistant for Administrators	Agent	26.07

Feature	AI Type	Release
Financial Consolidation and Close Assistants	Agent	26.07

EPM Assistants for FreeForm

Feature	AI Type	Release
EPM Activity Reports Assistant for Administrators	Agent	26.07
EPM Assistant	Agent	26.04

EPM Assistants for Narrative Reporting

Feature	AI Type	Release
Narrative Reporting Assistant	Agent	26.05

EPM Assistants for Planning

Feature	AI Type	Release
EPM Activity Reports Assistant for Administrators	Agent	26.07
EPM Assistant	Agent	26.04

EPM Assistants for Tax Reporting

Feature	AI Type	Release
EPM Activity Reports Assistant for Administrators	Agent	26.07
Tax Reporting Assistant	Agent	26.07

EPM Assistants for Task Manager

Feature	AI Type	Release
Task Manager AI Assistants	Agent	26.06

4

AI Feature Enhancements

Refer to this section to review enhancements to AI features available to all Oracle Enterprise Performance Management Enterprise Cloud Service and Oracle Enterprise Data Management Cloud Service customers.

- [PCM Agent Enhancements](#)
- [IPM Insights Enhancements](#)
- [Auto Predict Enhancements](#)
- [Advanced Predictions Enhancements](#)
- [Predictive Planning Enhancements](#)
- [Predictive Cash Forecasting Enhancements](#)
- [Notes Summarization with GenAI Enhancements](#)
- [Generative AI for Management Reporting Narratives Enhancements](#)

PCM Agent Enhancements

This table lists all enhancements added to the PCM Agent after its initial release in 25.05.

PCM Agent Feature Enhancement	Release
Ability to Copy, Clear, and Delete Multiple POVs	26.06
Calculation Performance Analysis Summary in PCM Agent	26.04
Support for Substitution Variables in PCM Agent Clear POV, Copy POV, Delete POV, and Calculate Model Commands	26.04
PCM Agent: Ability to Specify a POV Range When Calculating a Model	26.04
PCM Agent: Artifact Button Changed to a Hyperlink	26.04
PCM Agent Performance Assistant	25.11
Enhanced Rule Filtering in PCM Agent	25.08
New Smart Lookup Feature When Creating User Requests in PCM Agent	25.08

IPM Insights Enhancements

This table lists all enhancements made to IPM Insights since its initial release in 21.11. These enhancements apply to all business processes that include IPM Insights.

IPM Insights Feature Enhancement	Release
New Period Movement Variance Insight Type	26.07
Ability to View Insights from Forms and Dashboards	26.07
Support for Scaling and Precision	26.06
Generative AI Narrative Summaries Available for Account Dimension	26.04
Consistent Formatting and Highlighting in Generative AI Insight Summaries	25.11
Improved Relevance of Insight Generation with New Dismiss Insight Options	25.09
Generating Insights and Predictions for Dynamic Calc Members	25.05
Summarizing IPM Insights with Generative AI	25.04
Collaborating with IPM Insights Using Tags	24.06
IPM Insights Enhancements	23.09
Support for Calendars and Events in IPM Insights, Auto Predict, and Predictive Planning	23.08
Ad Hoc Grid Opened from an Insight Now Displays the Full Range of Cells	23.07
Easier Way to Delete Members Used in Insights and Auto Predict Definitions	23.04
Ability to Delete Insights Comments	23.02
IPM Insights Analyzer View Enhancements	22.11
Ability to Generate Insights for Dynamic Calc Parent Members	22.09
IPM Insights Chart Enhancements	22.09

Auto Predict Enhancements

This table lists all enhancements made to Auto Predict since its initial release in 20.08. These enhancements apply to all business processes that include Auto Predict.

Auto Predict Feature Enhancement	Release
Handling Decimal Values in Predictions with GenAI	26.06
Handling Negative Predictions with GenAI	26.06
Improvement in Accuracy Calculation	26.06
Enhanced Configuration for Auto Predict and Ability to Generate Auto Predict Predictions for Dynamic Calc Members	25.11

Auto Predict Feature Enhancement	Release
Auto Predict Predictions Can Run When The Last Historical Period Data Value is Empty	25.02
Support for Calendars and Events in IPM Insights, Auto Predict, and Predictive Planning	23.08
Easier Way to Delete Members Used in Insights and Auto Predict Definitions	23.04
Advanced Auto Predict Options	22.09
Detailed Reports for Auto Predict Predictions	20.12

Advanced Predictions Enhancements

This table lists all enhancements made to Advanced Predictions since its initial release in 25.08. These enhancements apply to all business processes that include Advanced Predictions.

Advanced Predictions Feature Enhancement	Release
Ability to Select Multiple Target Accounts or Members for Output to Predict	26.06
Ability to Select Drivers at a Specific Intersection	26.06
Support for Regression Algorithms	26.06
Prediction Definitions Require at Least Two Input Drivers	26.04
Ability to Generate Advanced Predictions for Dynamic Calc Members	25.11
Explainability Enhanced with Feature Importance	25.11
Prediction Accuracy Improved with Feature Engineering and Feature Selection	25.11

Predictive Planning Enhancements

This table lists all enhancements made to Predictive Planning since its initial release in 16.12. These enhancements apply to all business processes that include Predictive Planning.

Predictive Planning Feature Enhancement	Release
Handling Decimal Values in Predictions with GenAI	26.06
Handling Negative Predictions with GenAI	26.06
Improvement in Accuracy Calculation	26.06

Predictive Planning Feature Enhancement	Release
Generating Insights and Predictions for Dynamic Calc Members	26/05
Support for Calendars and Events in IPM Insights, Auto Predict, and Predictive Planning	23.08
Advanced Prediction Options	22.10
Predictive Planning Now Supports Full POV Selection for Historical Data and Alternate Cubes for Historical Data and Prediction Data	20.08
Predictive Planning Chart Interaction and Other Enhancements	17.07

Predictive Cash Forecasting Enhancements

This table lists all enhancements made to Predictive Cash Forecasting since its initial release in 24.04.

Predictive Cash Forecasting Feature Enhancement	Release
Support of Up to 100 Actual Days in Daily Rolling Forecasts	26.06
Integration with Oracle Cloud ERP	26.04
Predictive Cash Forecasting Rules Updated to Support Customized Form and Dashboard Layouts	25.06
Key Predictive Cash Forecasting Forms Converted to Dashboards	25.06
Predictive Cash Forecasting View By Forecast Method Supports What-if Analysis and Line Item Adjustments	25.06
Predictive Cash Forecasting Now Supports Cash Buffer and Cash Over Buffer Line Items	25.06
Loading, Reviewing, and Updating Predictive Cash Forecasting Historical Opening Bank Balance and Bank Balance is Now Easier	24.10
Predictive Cash Forecasting Simplifies Loading the Opening Balance	24.05

Notes Summarization with GenAI Enhancements

This table lists all enhancements made to Notes Summarization with GenAI since its initial release in 25.08

Notes Summarization with GenAI Enhancements	Release
Notes Summarization in GenAI: New Sample Reports	25.11

Generative AI for Management Reporting Narratives Enhancements

This table lists all enhancements made to Generative AI for Management Reporting Narratives since its initial release in 24.10.

Generative AI for Management Reporting Narratives Enhancements	Release
Support for Generative AI Narrative Summaries	26.06
Gen AI Formula Segment Support for Causality Analysis	26.06
Gen AI Enhanced Column and Dimension-Based Support for the Compare Use Case	26.06
New Generative AI Sample Reports	26.06
Auto Text Summary Criteria Manager and Zoom Capabilities	26.03