CARESOFT INC.

EPM Mate

One suite for Oracle EPM Cloud

Governance, operations, audit controls, administration and test automation in a single place.

For Planning · FCCS · ARCS · EDMCS

EPM TestMate

Automated regression testing and patch compliance after every Oracle update, with audit-ready evidence.

EPM Admin

Application catalog, health monitoring with threshold alerts, troubleshooting from Activity Reports and logs, and no-code batch job workflows.

EPM Auditor

SOX audit readiness: user access review campaigns, continuous segregation-of-duties checks, change management and evidence packs.

EPM CoE Portal

The digital front door: standards, run books, training, roadmap and value, per application.

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Oracle EPM Cloud changes every month. Everything around it has to keep up.

Oracle updates every EPM Cloud pod on a fixed monthly cadence. Portfolios, hierarchies and rules keep moving. Auditors keep asking. And the people who know how the applications really work are few. EPM Mate is built for exactly that: more change, fewer people, and evidence that has to exist.

The monthly update

Twelve updates a year, close week or not. Regression is either skipped or done by hand, and nobody can find the sign-off email in March.

With EPM Mate: Regression in hours, run by Finance, with the audit package produced by the same workflow that ran the tests.

Operations by complaint

Cube growth, slow calc scripts and degraded response times surface when a user calls, usually in close week. Scripting knowledge lives with one or two people.

With EPM Mate: Threshold alerts in week one, and admin jobs built from a sentence, scheduled and logged, with production safeguards.

Evidence rebuilt by hand

Each quarter the user access review is assembled from exports and lookups, approvals are chased by email, removals are made by hand and proved by re-export. SoD conflicts and change evidence are rebuilt the same way.

With EPM Mate: Access reviews run as campaigns with routing, reminders, remediation and automatic reconciliation; SoD is checked on every pull; every change is tied to its ticket.

Knowledge in a few heads

Documentation in different drives, practices that differ by region, and a forecast cycle that slows down when its owner is on leave.

With EPM Mate: Run books complete enough to hand over, and a maturity score that names the gap before anyone is on leave.

One login, four utilities, one evidence trail, for the same Oracle EPM applications.

EPM Mate brings four utilities to every Oracle EPM Cloud application (Planning, FCCS, ARCS and EDMCS) under single sign-on, a product switcher and role-based access. Each utility stands on its own. Together they connect the monthly Oracle update, daily operations, the SOX audit and the front door your users come through.

WHY IT MATTERS

- A portfolio in motion: acquisitions, disposals and reorganizations mean entities, hierarchies and consolidation logic are constantly changing, so every monthly Oracle update lands on applications that are themselves moving.
- A mandate for automation: finance and IT teams are expected to automate functions and processes at a fraction of the prior cost, including third-party spend, and to do more with fewer hands.
- SOX scope every quarter: for public companies, consolidation and planning applications sit inside ITGC scope, and the evidence has to exist on the day it is asked for.

Supports Planning, FCCS, ARCS and EDMCS. Hosted by Caresoft on Azure or deployed in your own Azure tenant; credentials held in Azure Key Vault; full audit trail in SQL.

Four utilities, one platform

Each utility stands on its own and can be adopted on its own. Together they connect the monthly Oracle update, daily operations, the SOX audit and the front door your users come through.

THE FOUR UTILITIES

Utility	What it does	Who relies on it
EPM TestMate **The monthly update**	Automates regression testing after every Oracle update and application change; baseline-vs-post-patch compare with visual diffs; a 15-step patch-cycle run book and an audit package that builds on its own.	EPM admins, testers and Finance reviewers
EPM Admin **The daily view**	One catalog of every application and pod; health diagnostics with threshold alerts; the performance of rules, forms, reports and jobs tracked over time and tagged to artifact changes; Activity Reports and logs cross-referenced for troubleshooting; Batch Job Studio turns plain English into scheduled batch job workflows with production safeguards.	Platform owners and on-call admins
EPM Auditor **The audit**	Quarterly user access review campaigns from identity-domain export to remediation and reconciliation, routed by business unit or to each user's manager; segregation-of-duties checks against your GRC policies on every pull; every object change tied to its ServiceNow ticket; evidence packs in the form your audit requests ask for.	EPM admins, Controllers, internal audit and control owners
EPM CoE Portal **The front door**	Run books, checklists, learning paths, contacts, roadmap and value per application, with a maturity score from 1 to 5 and warnings that raise themselves.	The CoE lead, Finance leadership and every user

ONE UPDATE, FOUR PLACES IT SHOWS UP

EPM TESTMATE
validates the monthly update and signs the evidence off

→

EPM ADMIN
shows which applications adopted it in the update tracker

→

EPM AUDITOR
holds the release-governance evidence for the SOX file

→

EPM COE
lists the release against every application it touches

WHY RUN THE WHOLE SUITE

One evidence trail, from update to audit

The release TestMate validates is the one Auditor files, Admin tracks and the CoE Portal lists. When the auditor asks how an update, an access change or a job was controlled, there is one answer and one set of evidence.

Problems found the week they happen

The suite runs on Oracle's calendar: the compare after the first Friday, the alerts every morning, the access pull before quarter end. A broken rule or an unexpected grant surfaces in days, not when a user calls.

A practice that keeps running when the expert is away

Test libraries, run books, approver matrices and job workflows live in the suite with named owners and review dates, not on one administrator's laptop. The maturity score shows where that is not yet true.

4 in 1

Hosted by Caresoft on Azure or deployed in your own Azure tenant; credentials in Azure Key Vault; full audit trail in SQL. One setup, one security review and one managed-service team; single sign-on, a product switcher and role-based access come as standard. Named operators and administrators are licensed; viewers and approvers are unlimited.

HOW TO START

A no-cost proof of concept under Caresoft's co-investment model, on one of your applications and your own data, followed by fixed-cost delivery with no run-rate surprise.

EPM TestMate

Automated regression testing and patch compliance for Oracle EPM Cloud: Planning, FCCS, ARCS and EDMCS from one portal.

The monthly Oracle update stops being an event, and the SOX evidence builds on its own.

EPM TestMate automates Oracle EPM regression testing, validates critical business processes, identifies changes and failures, and generates audit-ready evidence. Functional users define tests in a wizard; no automation scripts, no dependence on one engineer.

WHY IT MATTERS

- Oracle pushes an update to every pod every month, close week or not. Today the choice is skip regression and hope, or burn analyst days re-opening forms and re-running rules by hand.
- Every update lands on applications that are themselves changing: new entities, hierarchies and rules. A broken rule found on day three of close is the expensive outcome.
- The auditor will ask how each update was controlled. EPM TestMate produces that answer while you test: readme review, IT and Business sign-off, baseline evidence, final audit package.

WHAT IT DOES

Test	Compare	Prove
• Regression after monthly updates, patches and application changes • End-to-end process tests: planning, forecasting, budgeting, consolidation, close • Calculation, data, metadata, forms, Smart View, reports, integration, data-load and security validation • Load and performance testing with simulated concurrent users; DEV / TEST / PROD comparison • Scheduler (daily, weekly, monthly) with failure notifications	• Known-good baseline for every application: forms, rules, scripts, integrations, dashboards, reports, bursts • Step-by-step Before, After and Visual Difference; data slices in a grid • Summary of Added, Removed, Modified and Unchanged • Certify a mismatch as expected, with an audit trail • Snapshot comparison; re-run failed steps in place • AI failure summaries and natural-language insights ("What failed after this month's update?")	• Screenshot and PDF evidence per step; downloadable HTML reports • Oracle What's New imported monthly, triaged against features in use; IT Go / Skip, then Business sign-off • 15-step patch-cycle run book with owners, deadlines and evidence upload • Two-level sign-off and an auto-generated audit PDF • Final audit ZIP: readme analysis, baseline reports, comparison, version screenshot, run book, manifest • Central audit library grouped by month

12 ×

updates a year × applications × person-days per application = your annual regression cost. Four applications at two days each is about 100 person-days, before counting one bad rule found at quarter-end.

HOW TO START

A no-cost proof of concept on one application across Oracle's monthly update (test pods first Friday, production third Friday): your own baseline-vs-post-patch compare and your own audit package.

Runs on Azure (Durable Functions, Service Bus, Blob evidence store), Playwright browser automation and EPM Automate; full audit trail in SQL; role-based access.

EPM Admin

Application catalog, health monitoring and no-code batch job workflows for every Oracle EPM application and pod.

Know an application is sick before a user does, and run the platform with a smaller, safer team.

EPM Admin gives the platform owner one morning screen: every application, pod, version, owner and integration in a catalog; health diagnostics with threshold alerts and performance tracked over time; Activity Reports and logs cross-referenced when something slows down; and Batch Job Studio, which turns a plain-English description into a scheduled, logged EPM Automate workflow with production safeguards.

WHY IT MATTERS

- One place that holds a single list of every application, pod, version, owner and integration, with a clear view of which applications have adopted which Oracle release.
- Cube growth, slow calc scripts and degraded response times surface today as complaints in close week, and finding the cause can take a weekend in Activity Reports. Threshold alerts find them in week one; cross-referenced logs find the cause in hours.
- EPM Automate scripting lives with one or two people and production changes have no guardrails. Batch Job Studio lets anyone on the team build, run and schedule jobs safely.

WHAT IT DOES

Catalog	Insights	Batch Job Studio
• Every application with KPIs: total, active, open alerts, prod vs non-prod, last sync • Search, filter, group; export to CSV; discover and bulk-import applications registered in EDMCS • Application detail: owner, process, dimensions, cubes, jobs, variables, integrations, environments • Multiple pods (Prod, Dev, Test) with version tracking • Oracle monthly-update adoption tracker • Enhancement backlog and issue tracker through Wall of Work / ServiceNow integrations	• Health check: design and performance diagnostics; Essbase block analysis and tuning recommendations • Application size growth: data, backups, snapshots • Essbase BSO / ASO cube statistics with trend drill-down and alert markers • Adoption: daily, 7-day and 30-day unique users; usage by hour • Response time, slowest calc scripts and UI actions over 2 seconds, tracked over time and tagged to changes • Threshold alerts vs yesterday, 7 and 30 days; alert log with resolution history; every metric explained • Troubleshooting: Activity Reports and logs cross-referenced, so the cause of a slow calc takes hours, not a weekend	• No-code builder for batch scripts using EPM Automate and PowerShell • Drag-and-drop steps, variables, output passing, on-failure stop / continue / branch • AI: describe the task in plain English; refine; see assumptions, missing inputs and warnings • Generated PowerShell to copy or download; live streaming output and logs • Production safeguards: type-to-confirm on destructive commands, admins only • Saved workflows, scheduler, run logs; EPM Cloud and SFTP connections; credentials in Azure Key Vault

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UI actions slower than this are flagged automatically, alongside cube growth, slowest calc scripts and adoption, against thresholds you set. Every alert shows previous vs current value and % change.

HOW TO START

Connect one application and pod. See its health metrics, its first threshold alert, and one recurring admin job rebuilt in Batch Job Studio from a sentence.

Credentials stored in Azure Key Vault; issues and enhancements raised in your own systems (e.g. ServiceNow), not in another queue.

EPM Auditor

SOX audit readiness for Oracle EPM Cloud: user access review campaigns, segregation of duties, change management and evidence.

Walk into the SOX audit with the evidence already assembled.

EPM Auditor runs the quarterly user access review end to end (exports, approvals, remediation, reconciliation), checks every user against your SoD policies on every pull, and ties every object change to its ticket, with the evidence for all three in one governed repository.

WHY IT MATTERS

- For public companies, consolidation, planning and reconciliation applications sit inside SOX ITGC scope; the access review, the SoD check and the change log are tested every quarter.
- Today the access review is weeks of exports, lookups and spreadsheets by business unit, approvals chased in email, removals made by hand and proved by re-export. A campaign replaces all of it.
- SoD conflicts surface after the fact and change evidence is rebuilt from tickets and screenshots. Here conflicts are found on every pull and each change is tied to its ticket as it happens.

WHAT IT DOES

Access review campaigns	Segregation of duties	Change management & evidence
• Scheduled pull from Oracle identity domains and application security (ARCS teams and preparer / reviewer roles, Task Manager); Shared Services exports for on-prem users • Active Directory enrichment: title, location, manager, status; terminated and dormant accounts flagged • Group-naming parser resolves business unit, property, role and access level; service accounts by rule • Approver matrix by business unit, or routing to each user's manager; one-click quarterly campaign by approver, with reminders and escalation • Reviewer workbench: keep / remove / change, bulk-keep, what changed since last review; self-approval blocked; signed attestations • Remediation through identity-domain and application APIs; automatic re-pull and reconciliation before quarter end	• Policy import from AuditBoard / Optro and Excel, versioned with effective dates; the GRC tool stays system of record • Role-to-capability mapping for Planning, FCCS, ARCS, EDMCS, Task Manager, Data Integration and on-prem HFM • Conflict detection on every pull, naming the roles or groups behind each conflict, with severity; ARCS preparer-reviewer pairs included • Preventive check on proposed grants from the ServiceNow access-request workflow • Resolution workflow: remove, accept with a mitigating control, or exception with expiry and re-certification; two-approver sign-off • Elevated-access register for Service Administrators and power users, re-certified periodically	• ServiceNow connector: tickets, approvals, CAB decisions, implementation dates • Object change detection from EPM audit logs and snapshot diffs, with before and after values • Change-to-ticket matching; unauthorized-change report; developer-not-promoter check • Promotion evidence: Migration / LCM between Test and Production, linked to the ticket and to EPM TestMate evidence • Evidence packs per control and campaign, in the form audit requests ask for: report runs with timestamps, every reviewer's response, removals, admin listings, before and after snapshots • Point-in-time snapshots, full audit trail, read-only auditor workspace

3–4 wks

is what a quarterly user access review costs an EPM admin today. A campaign launches in a day and reconciles itself.

HOW TO START

Load one quarter's extracts, or connect one identity domain and one application; run one access review campaign alongside your current process and compare the evidence.

Connectors: Oracle identity domains, Active Directory / Entra ID, ServiceNow, AuditBoard / Optro, EPM Cloud (REST, EPM Automate), Shared Services and DRM exports; or start on flat files.

EPM CoE Portal

The digital front door for Oracle EPM: governance, standards, training, support, roadmap visibility and continuous improvement, organized by application.

An EPM practice independent of who is running it.

The portal puts every process, document, learning path, contact and enhancement for each EPM application in one place, each with a named owner and a review date. Each application owner maintains their own content, so the CoE sets the standard without becoming the bottleneck.

WHY IT MATTERS

- Multiple regions bring different EPM practices and documentation in different drives. A content template makes the twentieth application look like the first.
- When the person who runs the forecast is on leave, the cycle slows down. Run books complete enough to hand over, with named backups, mean the process stops depending on who is running it.
- The EPM value dashboard shows the value of each application against a dated baseline, in the same place as the work.

WHAT IT DOES

Per application	Governance you can measure	Value and change
• Dashboard: maturity score, KPIs, open warnings and the value dashboard • Process Library: run books (ownership, calendar, steps with screenshots, controls, FAQ, handover pack) and per-cycle checklists with log • Knowledge Base: design documents, SOPs, templates, specifications, learning paths, new-joiner onboarding, release refreshers, curated Oracle resources • Community and Help: single points of contact, meeting cadence, surveys, FAQ, known issues with workarounds	• Maturity level 1–5 (ad hoc to optimized), recalculated nightly from six drivers: documentation completeness, review discipline, training completeness, ownership and backup cover, run-book depth, FAQ and issues • The weakest driver sets the ceiling and is named, so the next improvement is never a guess • KPIs that suit the application, each with a target and a trend • Warnings that raise themselves: content past review, run books never reviewed, processes with no backup, learning paths with empty modules • Built on Oracle's own guidance for an EPM Center of Excellence	• Innovation: enhancement requests, the roadmap, and the Oracle releases touching this application • Value Insights: goals, KPIs and value delivered against a dated baseline, cycle by cycle • What caused each movement and what would move the numbers next, each with an owner and review date, flagged when stale • Processes that span applications, written once and linked, not copied • Administration: application registry, users and roles, content templates; set up per new application in days

1–5

maturity score per application, recalculated nightly. "Our documentation is fine" becomes a number with a named gap, and nobody has to audit the portal by hand.

HOW TO START

A walkthrough runs against one of your applications, so you see your own processes, owners and KPIs in the structure before committing to anything.

A drive stores documents; the portal scores them. Coverage, freshness and ownership are measured from what is actually there.

Decide with your own results

Every EPM Mate engagement starts with a proof of concept on one of your applications, with your own data, at no cost under Caresoft's co-investment model. What follows is fixed-cost delivery: scope and price agreed up front, no run-rate surprise.

Run it yourself, or let Caresoft run it. The EPM Mate Managed Service puts Caresoft's Center of Excellence behind the suite: it maintains the test cases, runs the update cycle on test and production, runs the access-review campaigns with your administrators, keeps the CoE Portal current and prepares the evidence packs for every audit request, within an agreed number of hours a month.

1

Pick one application

The one that hurts most: the busiest update cycle, the noisiest close, the thinnest documentation, or the next audit.

2

Run the proof of concept

EPM TestMate across one monthly update, EPM Admin on one pod, EPM Auditor on one access review campaign, or the CoE walkthrough. Your choice, your data.

3

Review the results

Your baseline-vs-post-patch compare, your first alert, your first evidence pack, your maturity score. Then decide, and roll out at a fixed cost.

ABOUT CARESOFT

Caresoft Inc. is a Princeton, New Jersey consultancy specializing in Oracle EPM and finance transformation for Fortune 500 clients: FCCS, EPBCS, EDMCS, HFM and FDMEE implementations, managed services for Hyperion and EPM Cloud environments, and an in-house Oracle EPM Center of Excellence from which EPM Mate was built. Caresoft is ISO 27001, SOC 2 and CMMI certified and an Oracle PartnerNetwork member.

WHY CARESOFT

Oracle EPM specialists

Implementations, upgrades and managed services across FCCS, EPBCS, EDMCS, HFM and FDMEE, delivered by an in-house Oracle EPM Center of Excellence.

Built from practice, not theory

Each EPM Mate utility began as the way Caresoft runs client environments: monthly patch validation, platform health checks, SOX evidence, CoE governance.

Fixed-cost delivery

Scope and price agreed up front. No run-rate surprise, no change-request treadmill.

Co-investment proof of concept

Caresoft funds the proof of concept on your application and your data. You decide with your own results.

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