

YOUR ORACLE EPM COMMAND CENTER

EPM COMMANDER™

The AI-powered command center for Oracle EPM Cloud – inside Excel.

Administer, analyze and optimize your Planning and FCCS environments without leaving the tool your finance team already lives in.

EPM Commander is an Excel add-in that turns a full Oracle EPM Cloud administration suite and an agentic AI assistant into one ribbon. Manage security, metadata, jobs, journals and integrations directly against the REST API – and let AI investigate performance issues, explain business rules, detect security drift and answer questions about your application in plain language. Every native tool works without an AI provider: AI is an option you switch on, not a dependency.

30+ admin & analysis tools in one Excel ribbon	18 application analysis report modules, application-aware	Planning + FCCS module-aware – controls appear per application type	Bring your own LLM Claude, OpenAI or Gemini keys – and every native tool works with none	Multi-environment saved PROD / TEST / DEV connections, one-click switching
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01 – WHY NOT JUST DO IT BY HAND?

An EPM administrator's day is spread across the web console – Jobs, Data Exchange, Access Control, each its own card – Smart View, EPM Automate scripts and a folder of spreadsheets tracking what the tools will not. Three chronic pains follow, and Commander is built to remove each one.

PAIN → WHAT CHANGES

FRAGMENTATION → ONE COCKPIT

A dozen browser tabs and a script only one person understands become one ribbon in Excel. Diagnosis and fix happen in the same window.

PAIN → WHAT CHANGES

OPACITY → EVIDENCE ATTACHED

"The app is slow", "4,000 rows did not load", "Maria cannot write here" – each answered in minutes with the workings shown, not a status code.

PAIN → WHAT CHANGES

TOIL → SPREADSHEET SPEED

Mappings, security, approvals and journals are maintained in a grid and validated before Oracle's own jobs run them. No export, edit, re-import loop.

THE SAME TASK, BY HAND AND WITH COMMANDER

	BY HAND TODAY	WITH COMMANDER	PER INSTANCE
"WHY CAN'T THIS USER WRITE TO THIS CELL?" – dimension flags, group membership, member ACLs and ancestors, valid intersections, often a proxy-account test. With Commander: right-click the cell.	45–90 min	1–3 min	~1 h saved
PERFORMANCE ROOT CAUSE – download activity reports, extract audit records, normalise time zones, cross-reference in Excel, interpret	2.5–4 h	10–20 min	~3 h saved
INTEGRATION KICKOUT TRIAGE – find the run, pull the process log, scan rejects, map back to source rows, find the mapping at fault	45–90 min	5–15 min	~1 h saved
"WHO HAS ACCESS TO WHAT?" FOR AN AUDITOR – export role assignments and artifact ACLs per type, resolve group membership, build the matrix	8–24 h	20–45 min	7–20 h saved
MEMBER WHERE-USED – search forms, rules, dashboards and navigation flows one at a time, and still miss some	20–60 min	under 1 min	~30 min saved
DATA LOAD MAPPING MAINTENANCE – export, edit, re-import, fix the rejects	30–90 min	10–20 min	~45 min saved
JOB FAILURE AND TREND ANALYSIS – page through the job console, tally by hand	1–2 h	~10 min	~1.2 h saved
MONTHLY ORACLE RELEASE TRIAGE – read What's New, assess each feature against this environment	2–4 h	20–30 min	~2.5 h saved
USER DEPROVISIONING REVIEW – export users, cross-reference activity, identify the inactive	3–6 h	~30 min	~4 h saved
INTERCOMPANY MATCHING ANALYSIS (FCCS) – run the report, export, pivot, separate one-sided breaks from genuine disagreements	3–6 h	20–30 min	~4 h saved

Per-instance figures, modelled by decomposing each task into its steps on both paths – not measured, and pitched at a competent administrator who knows where to look. Frequency is yours to set: the full model, with every assumption editable, is at captain-epm.com/roi-calculator.

02 — AI ASSISTANT & AGENTIC PLATFORM

AI ASSISTANT (CHAT) AI — Floating, context-aware chat inside Excel with a model picker in the header. Ask in natural language; the assistant calls real tools — around thirty across Excel, the local knowledge base and the connected environment — fetches EPM data, runs variance analysis and forecasts, and writes results into new worksheets. Conversations export as PDF.

GROUNDED, NOT GUESSING AI — Member counts come from the exact local outline, never the sampled knowledge graph. Where-used is indexed across forms, rules, dashboards, reports, action menus and navigation flows.

APPROVAL-GATED WRITES — Write tools sit behind an explicit “allow EPM write actions” toggle plus an approval dialog, and are not even advertised to the model in read-only mode. Group provisioning is verified after it runs.

MCP TOOL INTEGRATION AI — Auto-discovers tools from connected MCP servers, so the assistant extends to your own systems. State-changing actions are classified and gated behind human approval — nothing runs silently.

03 — APPLICATION ANALYSIS

APP ANALYSIS REPORTS AI — Eighteen application-aware modules as a branded PDF or in Excel: Full Report, Trends, Metadata, Configurations, Objects, Navigation Flows, Task Manager, Application Stats, App Diagnostics, Security, Audit Records, Artifact Change History, Integration Analysis, Job History; Approval Units for Planning; Close Cycle, Consolidation Design and Intercompany Matching for FCCS. Every AI narrative carries a disclosure stamp — model, time, environment — that cannot be switched off.

OBJECT ANALYSIS — Trace application objects and their dependencies before you change anything.

ESSBASE DATA ANALYSIS (BLOCK ANALYSIS) AI-assisted — Scan BSO cubes for zero-value and empty blocks, browse an interactive POV block map, and reclaim calculation performance.

UNUSED METADATA ANALYZER — Identify unused and level-0 members in BSO cubes that bloat outlines and slow calcs.

IPM INSIGHTS ANALYZER AI-assisted — Parse application-generated IPM insights from snapshots, push an insight's POV and metrics to a worksheet, and hand it to the AI agent to chase the root cause.

RELEASE REPORT AI — Oracle's monthly What's New fetched and each feature rated for its impact on this environment — the change that would break your close is found by the system, not by a user.

FILE REPOSITORY & CLOUD CLEANUP — Browse and manage stored files, and keep the cloud repository tidy with guided cleanup.

04 — OPERATION MANAGEMENT

PERFORMANCE INVESTIGATOR AI — Activity Report metrics and Audit Records on one timeline, with an AI chat over both, weekly digests and scheduled-job awareness. From “the app is slow” to “this rule, this user, this window.”

PERFORMANCE TRACKER — 120 metrics from Oracle's own Activity Reports, charted over time with forecasts — growth as a trend you act on, not a surprise at capacity review.

RULE ADVISOR AI — Every Calc Manager rule listed and graded, translated into plain English — and new rules written against the live outline, diffable and exportable to Calculation Manager.

JOB MONITOR — How jobs actually ran over 7, 30 and 60 days, by rate: runs per day, success rate, failures grouped by job, time per job. Evidence you can hand to an auditor.

JOB ORCHESTRATOR (JOB CONSOLE) — Every job runnable from Excel or queued into an ordered sequence, with searchable member pickers for runtime prompts and last-used values remembered. Runs never freeze Excel.

AUDIT LOG ANALYZER — Incremental local audit history — delta sync fetches only what is missing — with record-field filters on the grid and a chat over the records.

SNAPSHOT MANAGER & RESTORE — Browse, download and govern backups. Restore Environment is the product's one destructive operation, and its button stays disabled until the confirmation word is typed.

SUBSTITUTION VARIABLES — View, edit and delete sub vars across the application.

RIGHT-CLICK, IN THE GRID — **Inspect Member** — metadata and where-used for the member in this cell, from the local snapshot. **Security at This Intersection** — which access rules govern this cell, and why a named user can or cannot write to it. **Analyze with AI Assistant** — send the selected range to the chat as context.

BRING YOUR OWN LLM — Claude, OpenAI or Gemini with your own API keys. Choose models per task; the AI Usage Monitor meters every token, with full query history.

CAPTAIN'S LOG — DIAGNOSTIC AGENT AI — Traverses your tool execution history to pinpoint the root cause when something goes wrong — self-service supportability, without a ticket.

NEURAL GRAPH — The whole application as a living map — a cluster per plan type, a hue per object type. Select a rule and see every form that uses it, or filter the graph by conversation from the assistant.

05 — DATA & INTEGRATION

DATA LOAD MAPPINGS MANAGER — Hundreds of mappings maintained in a grid, validated against Oracle's rules, with a REPLACE that shows what it will overwrite first and a versioned backup to roll back to.

INTEGRATION PIPELINE GRAPH — Source systems, import formats, locations and load rules drawn as one map — see what a change touches before you make it, not at month end.

INTEGRATION AGENT AI — Import, transform and export as a funnel with inline kickouts and a trend chart, a safe re-run of a load rule, and a chat over the Data Management logs that explains a short load before finance asks.

06 — SYSTEM & SECURITY

SECURITY AGENT AI — Detect and explain security drift: what changed in permissions over time, and whether it matters.

SECURITY REPORT — Object Access, Effective Access, Security Changes and Group Cleanup in one report, each exportable to Excel, plus the SEC editor sheet.

GROUP CLEANUP — Which groups can safely be deleted, traced through membership, ACLs, roles, approval units, navigation flows and Task Manager. Only SafeToDelete is actionable; a check that did not run says Unknown. Fails closed.

SUBMIT SEC SHEET — Validate the SEC editor sheet and run Oracle's Import Security job for rows marked Add / Update / Remove — provisioning at spreadsheet speed.

BULK SECURITY ASSIGNMENT — Manage security assignments in bulk instead of one-by-one clicking.

LICENSE AUDITOR & DEPROVISIONING — Audit user licensing, review activity, and deprovision users from the application or the identity domain.

ENTERPRISE SIGN-IN — Basic, OAuth, SSO/MFA and identity-domain sign-in; credentials encrypted on the workstation.

07 — PLANNING CONTROLS Planning applications

PLANNING APPROVALS MANAGER — Approval units merged from the snapshot and live REST, so group-owned units the API alone will not return are shown. KPI cards, filters, the promotion path, comments on the action, and export to Excel.

08 — FCC CONTROLS FCCS applications

VALIDATE METADATA — FCCS metadata validation via REST, results reviewed in place.

MANAGE JOURNAL PERIODS — Open and close journal periods from a dashboard.

E-JOURNAL DETAILS — Search, drill to the line, then submit, approve, post or unpost through the REST API, with POV fields backed by the application's metadata.

FCC ADMIN CONSOLE — Intercompany Matching Reports over a Year + Period range, consolidation runs, Clear / Copy Data profiles, consolidation ruleset export and import.

INTERCOMPANY MATCHING ANALYSIS — Gross and net imbalance per plug group, the entities and partners carrying it, unmatched pairs ranked largest first — one-sided breaks separated from genuine disagreements. Computed, not model-written: complete without an AI provider.

09 — THE BUSINESS CASE, WITH THE ASSUMPTIONS SHOWING

Sixteen capabilities, each decomposed into its steps by hand and with Commander, expressed as the share of each team's month returned. The website runs the same model — put your own headcount in and every assumption recalculates.

1,630 h Hours returned per year, at the model's defaults	\$69,000 Value per year, at \$85,000 loaded cost per person	7.4 % Of the group's total capacity — a share, not a multiple
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14%

of the month back — Financial Systems / EPM Admin (2 people)

6%

Financial Close & Consolidation (4 people)

5%

Planning & Budgeting (4 people)

9%

Internal Audit & IT Security (1 person)

Modelled, not measured. Figures are rounded, and there is no telemetry behind the percentages; they are calibrated to land near 7% of capacity, which the task-level model on page 1 returns independently. A number an EPM administrator can argue with is worth more than one they can dismiss — bring yours to captain-epm.com/roi-calculator.

10 — WORK THAT BECOMES POSSIBLE never counted as hours saved

- + **GROUP CLEANUP** — tracing every group through ACLs, roles, approval units, nav flows and Task Manager is days of work by hand, so it is never done. Stale groups go; the access surface shrinks.
- + **QUARTERLY DESIGN REVIEW** — an assessment is a consulting engagement nobody re-runs. Design debt becomes visible and trended instead of surfacing during an incident.
- + **UNUSED METADATA SWEEP** — cannot be established reliably by hand. Outline size and calc cost are controlled deliberately.
- + **MONTHLY INTERCOMPANY BREAK ANALYSIS** — breaks triaged every period rather than at year end.
- + **CONTINUOUS SECURITY DRIFT REVIEW** — a point-in-time diff nobody builds becomes drift caught in the period it happens.
- + **CELL-LEVEL ACCESS SELF-SERVICE** — the question gets answered where it is asked, without an administrator every time.

"This half is not a cost saving — nobody is spending this time today. It is work that currently does not happen, and the exposure that comes with it."

11 — IT TELLS YOU THE TRUTH

- + **AI IS OPTIONAL.** Every native tool works without an LLM provider. The FCC console, intercompany analysis included, is complete without one; commentary is added on top only when a provider is configured.
- + **UNAVAILABLE SOURCES ARE NAMED, NOT GUESSED AT.** A pod that withholds a role report, or a snapshot with no Data Management, still produces everything else — and says what it could not read.
- + **EXACT WHERE IT MATTERS.** Asked to count members, the assistant refuses to answer from the sampled graph and counts the outline instead.
- + **VERDICTS FAIL CLOSED.** Group Cleanup says Unknown when a check did not run, never Safe.
- + **EVERY AI NARRATIVE IS STAMPED** with the model, the time and the environment. Reviewers can see it; nobody can switch it off.

12 — FOR IT: ACCESS YOU CAN DEFEND

- + A local Excel VSTO add-in — no server component, no agents inside Oracle EPM Cloud.
- + Talks to Oracle through the documented REST API as an ordinary client; nothing changes when Oracle applies its monthly patches.
- + Oracle EPM and LLM credentials stored encrypted in the local Windows profile.
- + No Captain EPM telemetry: application data goes only to your Oracle environment, AI traffic only to the provider you configure.
- + The add-in can do only what the signed-in EPM user can already do. AI write tools are gated behind explicit approval; read-only mode withholds them from the model entirely.
- + Every mutating call — user- or AI-driven — is recorded with target, outcome and timestamp, filterable in Captain's Log and exportable to Excel.

SUPPORTED VERSIONS & PREREQUISITES

- + Windows 10 or Windows 11, 64-bit
- + Microsoft Excel 2016, 2019, 2021 or Microsoft 365 — Windows desktop edition (VSTO); not Excel for Mac or Excel on the web
- + .NET Framework 4.8, the VSTO Runtime and the Microsoft Edge WebView2 runtime (preinstalled on Windows 11)
- + Per-machine installer, administrator rights required; update notifications arrive in the ribbon
- + Oracle EPM Cloud Planning and Financial Consolidation & Close via the official REST APIs; Service Administrator recommended for the full toolset
- + AI features are optional: your own Anthropic, OpenAI or Google API key. Node.js only if you connect external MCP servers
- + Zero external telemetry — your data stays in your environment
- + Captain EPM account with an active licence; sign in from the ribbon to activate

READY TO TAKE COMMAND?

REQUEST ACCESS · BOOK A DEMO

captain-epm.com/contact · support@captain-epm.com — we will walk your environment with you.

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