Oracle® Fusion Cloud EPM

Enterprise Data Management Quick Start Checklists

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Oracle Fusion Cloud EPM Enterprise Data Management Quick Start Checklists,

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Primary Author: EPM Information Development Team

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Documentation Feedback

To provide feedback on this documentation, click the feedback button at the bottom of the page in any Oracle Help Center topic. You can also send email to epmdoc_ww@oracle.com.

Part I
Service Administrator

Related Topics

- Learn and Connect Checklist for Oracle Enterprise Data Management Cloud Service Administrators
- Administering Checklist for Oracle Enterprise Data Management Cloud Service Administrators

1

Learn and Connect Checklist for Oracle Enterprise Data Management Cloud Service Administrators

Welcome Oracle Enterprise Data Management Cloud Service Administrators!

Here's a checklist to help you learn about Oracle Enterprise Data Management Cloud with links to training, reference materials and community resources.

Learn about Oracle Enterprise Data Management Cloud

1. Orient yourself with Oracle Enterprise Data Management Cloud by watching this video tour. (6 minutes)
2. Read an Enterprise Data Management overview. (15 minutes)
3. Visit the Enterprise Data Management library on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

Start using Oracle Enterprise Data Management Cloud

1. Review helpful information on getting started as a Service Administrator by watching this video. (5 minutes)
2. Review the basic administrator tasks that you'll perform. (25 minutes)

See new features in each monthly update

1. Once you're up and running, read about the new features in each monthly update. (5 minutes)
2. See all the Enterprise Data Management features from previous monthly updates. (5 minutes)

Connect with Oracle Enterprise Data Management Cloud communities

Join Customer Connect, an online community, to collaborate and learn with colleagues. Review each of these areas: (10 minutes)

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The EPM CoE team:

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How Do I Get Started?

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2

Administering Checklist for Oracle Enterprise Data Management Cloud Service Administrators

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> **Note:**
>
> This checklist is meant to be a general guideline for tasks to be performed on Day 1. It is assumed that the Identity Domain Administrator has created users and granted predefined roles (see Understanding Predefined Roles), the Oracle Enterprise Data Management Cloud business process has been created, and you have the correct EPM Cloud URL (see Sample EPM Cloud URLs).

Implement Oracle Enterprise Data Management Cloud

Sign up for the Implementation Success Program

The Implementation Success Program (ISP) is a service led by EPM Development for customers that uses a series of checkpoints during your implementation. The program

significantly increases the success rate of implementations by bringing in all EPM Development knowledge in an efficient way.

Read this and sign up: Enrolling in the Implementation Success Program (20 minutes)

Review and Bookmark the Oracle Enterprise Performance Management Cloud Operations Guide

Open the Oracle Enterprise Performance Management Cloud Operations Guide guide and review and bookmark the Troubleshooting chapter for resolution information and the Request chapter for optional updates.

Start Administering Oracle Enterprise Data Management Cloud

Log in and setup

1. Make sure your browser meets the prerequisites.

   Read this: Supported Browsers (15 mins)

2. Enable localization of the user interface (optional).

   Read this: Understanding EPM Cloud Localization (10 mins)

3. Customize the display for all users by changing the theme, or adding a custom logo or background image. (optional).

   Read this: Customizing Your Users' Display (10 mins)

4. Set up network restricted access (optional).

   Read this: Setting up Secure Access (15 mins)

5. Review the System Activity and Record Count Log reports.
   Read these topics:

   - System Activity Reports (5 minutes)
   - Record Count Log Report (10 minutes)

Manage User Security

1. Get familiar with application roles in Oracle Enterprise Data Management Cloud.
   Read these topics:
   - Understanding Application Roles and Permissions (20 minutes)
   - Oracle Enterprise Data Management Cloud Application Roles (5 minutes)

   Watch these videos:
   - Overview: Understanding Security in Enterprise Data Management Cloud Part 1 (6 minutes)
   - Overview: Understanding Security in Enterprise Data Management Cloud Part 2 (5 minutes)
2. Set up groups and assign roles.
   Read these topics:
   - Managing Groups (5 minutes)
   - Assigning Roles to a Group or a User (5 minutes)

   Watch this video:

   Setting Up Users and Groups (4 minutes)

Create and Migrate Applications

1. Get an overview of how applications work in Oracle Enterprise Data Management Cloud.
   Read these topics:
   - Working with Applications (10 minutes)
   - Understanding Registering Applications (10 minutes)

   Watch this video: Overview: Understanding Applications in Enterprise Data Management Cloud (3 minutes)
2. Load the sample application (optional).
   Oracle Enterprise Data Management Cloud contains a pre-packaged sample application that you can use to get familiar with Oracle Enterprise Data Management Cloud features and to work through tutorials.

   Read this: Creating a Sample Application (10 minutes).

   After you have finished working with the sample application, you can reset your environment by recreating your service. Read this: Recreating the Service (5 minutes).
3. Create an application.
   Review the documentation for the application type that you are creating:
   - Working with Planning Applications (25 minutes)
   - Working with Financial Consolidation and Close Applications (25 minutes)
   - Working with Oracle Financials Cloud General Ledger Applications (25 minutes)

- Working with E-Business Suite General Ledger Applications (25 minutes)
- Working with Universal Applications (25 minutes)

Watch a video for the application type that you are creating:

- Registering Planning Applications (5 minutes)
- Registering Financial Consolidation and Close Applications (6 minutes)
- Registering Oracle Financials Cloud General Ledger Applications (9 minutes)
- Registering Universal Applications (8 minutes)

4. Learn about migrating applications and artifacts.
   Read these topics:
   - Using Migration in Oracle Enterprise Data Management Cloud (10 minutes)
   - Backing up Artifacts and Application (15 minutes)

   Watch this video: Migrating Artifacts (4 minutes)

Set Up Maintenance and Backups

1. Get familiar with the daily maintenance snapshot and set the time that it is performed:
   Read these topics:
   - Overview of the Maintenance Snapshot (15 minutes)
   - Setting Maintenance Time for an Environment(10 minutes)
2. Learn how to back up the maintenance snapshot every day:
   Read this: Backing up the Maintenance Snapshot (15 minutes)

Prepare to Integrate

1. Learn about and create global connections, which enable you to share data with external applications using extracts.

   Read this: Creating Global Connections (10 minutes)
2. Install the EPM Automate utility to access environments over a command window to automate business activities. (optional)

   Read this: Installing EPM Automate (10 mins)
3. Get familiar with the REST API interface.
   Read this: REST API Overview. (20 minutes)

4. Learn about Task Manager in Financial Consolidation and Close.
   Read this topic: Task Manager Integrations with EPM Cloud Services (10 minutes)

   Watch this video: Managing Your Business Process Using Task Manager (5 minutes)

Part II
Owner

Related Topics

- Learn and Connect Checklist for Oracle Enterprise Data Management Cloud Owners
- Log in and Start Checklist for Oracle Enterprise Data Management Cloud Owners

3

Learn and Connect Checklist for Oracle Enterprise Data Management Cloud Owners

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2. Read an Enterprise Data Management overview. (15 minutes)
3. Visit the Enterprise Data Management library on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

Start using Oracle Enterprise Data Management Cloud

1. Review helpful information on getting started as an owner by watching this video. (8 minutes)
2. Review the basic owner tasks that you'll perform. (25 minutes)

See new features in each monthly update

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Connect with Oracle Enterprise Data Management Cloud communities

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Cloud adoption can empower your organization to improve business agility and promote innovative solutions. An EPM CoE oversees your cloud initiative, and it can help protect and maintain your investment and promote effective use.

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How Do I Get Started?

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Learn More

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4

Log in and Start Checklist for Oracle Enterprise Data Management Cloud Owners

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Here's a checklist to help you get going with Oracle Enterprise Data Management Cloud on Day 1 of your experience, with links to documentation and other resources.

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>
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Configure Application Metadata

1. Learn about views and viewpoints.
   Read these topics:
   - Working with Views (5 minutes)

- About Viewpoints (15 minutes)

2. Create views and viewpoints.
   Read these topics:
   - Creating a View (5 minutes)
   - Creating a Viewpoint (5 minutes)

   Watch this video: Creating Views and Viewpoints (4 minutes)
3. Get familiar with the data chain and data chain objects in Oracle Enterprise Data Management Cloud.
   - Read these topics:
     - Understanding Data Chains (15 minutes)
     - Working with Node Types (15 minutes)
     - Working with Hierarchy Sets (15 minutes)
     - Working with Node Sets (15 minutes)
   - Watch these videos:
     - Setting Up Node Types (7 minutes)
     - Creating Hierarchy Sets (4 minutes)
     - Creating Node Sets (2 minutes)
4. Learn about properties.
   Read this: Working with Properties (15 minutes)

Align Data Across Applications and Create Subscriptions

1. Learn about sharing data across applications.
   - Read these topics:
     - Aligning Dimensions Across Applications (15 minutes)
     - Sharing Changes Across Applications (15 minutes)
   - Watch this video: Sharing Data Across Applications (5 minutes)
2. Learn about subscriptions.
   Read this: Subscribing to Viewpoints (15 minutes)

   Watch this video: Overview: Automating Change Management With Subscriptions in Enterprise Data Management Cloud (5 minutes)
3. Create subscriptions.
   Read this: Creating, Editing, and Validating Subscriptions (15 minutes)
4. Review the Subscriptions report.
   Read this: Subscriptions Reports (10 minutes)

Configure Imports, Exports, and Extracts

1. Learn about bindings and bound data objects.
   Read this: Understanding Bindings and Bound Data Objects (15 minutes)
2. Learn about importing and exporting dimensions from Oracle Enterprise Data Management Cloud.
   Read this these topics:
   - Importing Dimensions (20 minutes)
   - Exporting Dimensions (10 minutes)

   Watch these videos:
   - Importing and Exporting Application Data (6 minutes)
   - Overview: Understanding Import Modes (7 minutes)
3. Learn about configuring extracts.
   Read this: Working With Extracts (15 minutes)

   Watch this video: Overview: Extracting Data (5 minutes)

Assign Permissions

1. Learn about permissions and data access.
   Read this: Understanding Application Roles and Permissions (10 minutes)

   Watch this video: Setting Up Roles and Permissions in Oracle Enterprise Data Management Cloud (6 minutes)
2. Assign permissions to data objects.
   Read these topics:
   - Working with Permissions (20 minutes)
   - Configuring Data Access (15 minutes)

Define Policies

1. Learn about approval, commit, and notification policies.
   Read this: Configuring Policies (15 minutes)

   Watch this video: Configuring Approval Policies in Oracle Enterprise Data Management Cloud (9 minutes)

   Step through this tutorial: Using Workflow Approvals in Oracle Enterprise Data Management Cloud (43 minutes)
2. Configure approval, commit, and notification policies.
   Read these topics:
   - Creating and Enabling Approval Policies (15 minutes)
   - Creating and Enabling Commit Policies (15 minutes)
   - Creating and Enabling Notification Policies (10 minutes)
3. Review the Permissions and Polices report. Read this topic: Permissions and Policies Reports (10 minutes).

Manage Business Rules

1. Get familiar with custom business logic.
   Read these topics:
   - Using Expressions to Define Custom Business Logic (10 minutes)
   - Expression Builder Overview (15 minutes)

   Watch this video: Overview: Custom Business Logic in Enterprise Data Management (3 minutes)

   Step through this tutorial: Finding a parent node using a node type converter expression (15 minutes)
2. Define custom business logic to derive the value of a property.
   Read this: Derived Properties (15 minutes)

   Watch this video: Deriving Properties with Expressions (5 minutes)
3. Define custom business logic to create a custom validation and view the Custom Validation report.
   Read this: Working with Custom Validations (10 minutes)

   Read this: Custom Validations Report (10 minutes)

Part III
Data Manager

Related Topics

- Learn and Connect Checklist for Oracle Enterprise Data Management Cloud Data Managers
- Log in and Start Checklist for Oracle Enterprise Data Management Cloud Data Managers

5

Learn and Connect Checklist for Oracle Enterprise Data Management Cloud Data Managers

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3. Visit the Enterprise Data Management library on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

Start using Oracle Enterprise Data Management Cloud

1. Review helpful information on getting started as a data administrator by watching this video. (6 minutes)
2. Review the basic data management tasks that you'll perform. (25 minutes)

See new features in each monthly update

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Run Imports, Exports, and Extracts

1. Run an import for your selected application type.
   - Read the topic that corresponds with your application type.

  - Importing Planning Dimensions (10 minutes)
  - Importing Financial Consolidation and Close Dimensions (10 minutes)
  - Importing E-Business Suite General Ledger Dimensions (10 minutes)
  - Importing Oracle Financials Cloud General Ledger Dimensions (10 minutes)
  - Importing a User Defined Dimension (15 minutes)
- Watch this video: Importing and Exporting Application Data (6 minutes)

2. Run an export for your selected application type.
   Read the topic that corresponds with your application type.
   - Exporting Planning Dimensions (10 minutes)
   - Exporting Financial Consolidation and Close Dimensions (10 minutes)
   - Exporting E-Business Suite General Ledger Dimensions (10 minutes)
   - Exporting Oracle Financials Cloud General Ledger Dimensions (10 minutes)
   - Exporting a User Defined Dimension (10 minutes)
3. Run an extract.
   Read this: Running Extracts (10 minutes)

Perform Comparisons

1. Get familiar with viewpoints.
   Read this: Navigating Viewpoints (10 minutes)
2. Compare viewpoints.
   Read these topics:
   - Displaying Viewpoints Side By Side (5 minutes)
   - Running Viewpoint Comparisons (10 minutes)

   Watch this video: Comparing Viewpoints (5 minutes)

Run Validations

Read this: Validating a Viewpoint (5 minutes)

Resolve Data Issues

Read this: Resolving Validation Issues (10 minutes)

Part IV
User

Related Topics

- Learn and Connect Checklist for Oracle Enterprise Data Management Cloud Users
- Log in and Start Checklist for Oracle Enterprise Data Management Cloud Participants
- Log in and Start Checklist for Oracle Enterprise Data Management Cloud Auditor

7

Learn and Connect Checklist for Oracle Enterprise Data Management Cloud Users

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Start using Oracle Enterprise Data Management Cloud

1. Review helpful information on getting started as a user by watching this video. (6 minutes)
2. Review the basic user tasks that you'll perform. (25 minutes)

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8

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Browse Data Through Views

1. Get familiar with viewpoints.

Read this: Navigating Viewpoints (10 minutes)

2. Navigate viewpoints to browse data.
   Read these topics:
   - Searching for Nodes (10 minutes)
   - Displaying Viewpoints Side By Side (5 minutes)
   - Locating Nodes (10 minutes)
   - Aligning Nodes (10 minutes)
3. View the history of transactions for a node.
   Read this: Viewing Node Transaction History (10 minutes)

Submit and Approve Changes Using Requests

1. Learn about requests.
   Read this: About Requests (10 minutes)

   Watch this video: Overview: Understanding Requests in Enterprise Data Management Cloud (3 minutes)
2. Make changes to data by creating a request.
   Read these topics:
   - Making Changes Using Requests (5 minutes)
   - Making Changes Interactively (20 minutes)
   - Making Changes Using a Load File (10 minutes)

   Watch this video: Managing Complex Data Changes With Requests (4 minutes)
3. Submit a request for approval.
   Read these topics:
   - Governance Workflows and Approvals (10 minutes)
   - Submitting a Request (5 minutes)

   Watch this video: Overview: Workflow Approvals in Enterprise Data Management Cloud (4 minutes)

   Step through this tutorial: Workflow Approvals in Oracle Enterprise Data Management Cloud (43 minutes)
4. Approve a request.
   Read this: Approving a Request (10 minutes)
5. Get familiar with the Request Activity list.
   Read this: Working with Request Activity (10 minutes)

Get Familiar with Notifications

Read these topics:

- Request Notifications (10 minutes)
- Workflow Notifications (10 minutes)
- Subscription Notifications (10 minutes)

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Log in and Start Checklist for Oracle Enterprise Data Management Cloud Auditor

Welcome Oracle Enterprise Data Management Cloud Auditors!

Here's a checklist to help you learn about Oracle Enterprise Data Management Cloud with links to training, reference materials and community resources.

> **Note:**
>
> This checklist is meant to be a general guideline for tasks to be performed on Day 1 after the Oracle Enterprise Data Management Cloud application is ready to use. It is assumed that the Oracle Enterprise Data Management Cloud business process and application have already been fully set up and implemented, and that changes to data have been made using requests. There may be more or fewer tasks required for this role on Day 1, depending on your organization's requirements, the application design, and the application roles you have been assigned.

Audit Changes Made by Other Users

- Read this topic: Auditing Transaction History (15 minutes) .
- Watch this video: Audit in Enterprise Data Management (4 minutes)