

Oracle® Cloud

Getting Started with Oracle Enterprise Performance Management Cloud for Users



E96238-19



Oracle Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Users,

E96238-19

Copyright © 2017, 2020, Oracle and/or its affiliates.

Primary Author: EPM Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Documentation Accessibility

Documentation Feedback

1 New EPM Cloud Services

Who Should Read this Chapter	1-1
About the New EPM Cloud Services	1-1
EPM Standard Cloud Service	1-2
EPM Enterprise Cloud Service	1-5
New EPM Cloud URL	1-7
Using the EPM Cloud Features Tool to View the Features Released Each Month	1-7
Product Name and Terminology Changes	1-8

2 Understanding EPM Cloud Components

Overview of EPM Cloud	2-1
Overview of Planning (Planning and Budgeting Cloud)	2-2
Overview of Planning Modules	2-3
Overview of Financial Consolidation and Close	2-4
Overview of Tax Reporting	2-5
Overview of Profitability and Cost Management	2-6
Overview of Account Reconciliation	2-6
Overview of Oracle Enterprise Data Management Cloud	2-7
Overview of Narrative Reporting	2-9
Overview of Strategic Workforce Planning	2-10
Overview of Sales Planning	2-10
Setting Up Browsers for EPM Cloud	2-12
Supported Browsers	2-12
Configuring Google Chrome for a Localized Version of the Service	2-12
Configuring Microsoft Edge	2-13
Configuring Firefox	2-14

Configuring Firefox for a Localized Version of the Service	2-15
Browsers on Mobile Devices	2-15
Minimum Screen Resolution	2-15
Accessing EPM Cloud	2-15
Authenticating Using Oracle Cloud Credentials	2-16
Authenticating Using Single Sign-On Credentials	2-16
Understanding the Home Page	2-17
Changing Your Password	2-18
Turning on Accessibility Mode	2-19
Sample EPM Cloud URLs	2-19
Information Sources	2-21
Oracle Cloud Help Center	2-22
Oracle Learning Library	2-23
Understanding EPM Cloud Localization	2-23

3 Working with EPM Cloud Components

Available Clients and Utilities	3-1
Prerequisites	3-4
Smart View Requirements	3-4
Calculation Manager Requirements	3-5
Downloading and Installing Clients	3-5
Accessing a Service Using Smart View	3-6
Connection Types	3-6
URL Syntax for Smart View Connections	3-7
Configuring Connections in Smart View	3-7
Configuring a Shared Connection	3-7
Configuring a Private Connection	3-8
Initiating a Connection	3-8
Connecting to a Service Using Financial Reporting Web Studio	3-9

4 Working in EPM Cloud Environments

Understanding Updates to an Environment and Viewing Readiness Information	4-1
Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility	4-2
Submitting Feedback Using the Provide Feedback Utility	4-3
Disabling Feedback Notification	4-4

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc>.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

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.

1

New EPM Cloud Services

In this Section:

- [Who Should Read this Chapter](#)
- [About the New EPM Cloud Services](#)
 - [EPM Standard Cloud Service](#)
 - [EPM Enterprise Cloud Service](#)
- [New EPM Cloud URL](#)
- [Product Name and Terminology Changes](#)

Who Should Read this Chapter

You should read this chapter if you purchased EPM Standard Cloud Service or EPM Enterprise Cloud Service.

New Customers

Changes introduced as a part of the new approach to structuring Oracle Enterprise Performance Management Cloud business processes affect new customers and existing customers who purchase additional new subscriptions. New customers who purchase one of the following EPM Cloud services should read this chapter.

- [EPM Standard Cloud Service](#)
- [EPM Enterprise Cloud Service](#)

Existing Customers Adding a New Service

Current customers will continue using the existing EPM Cloud environments with which they are familiar.

About the New EPM Cloud Services

The new Oracle Enterprise Performance Management Cloud Services provide end-to-end business processes to meet the requirements of most organizations and ensure a connected and agile experience across multiple business processes.

New customers now purchase one of the following EPM Cloud services.

- [EPM Standard Cloud Service](#)
- [EPM Enterprise Cloud Service](#)

The business processes and features available to you depend on the specific EPM Cloud service that you purchased. Generally, the EPM Enterprise Cloud Service includes everything in the EPM Standard Cloud Service as well as additional offerings as illustrated in the following image:

EPM Standard Cloud Service	EPM Enterprise Cloud Service
Module-based Planning <ul style="list-style-type: none"> • Capital • Financials • Projects • Workforce • Strategic Modeling Hybrid BSO Cubes and ASO Reporting Cubes	Planning <ul style="list-style-type: none"> • Custom Planning (with support for Strategic Modeling) • Free Form Planning • Module-based Planning <ul style="list-style-type: none"> • Capital • Financials • Projects • Workforce • Strategic Modeling • Groovy Support • Hybrid BSO Cubes and ASO Reporting Cubes
Account Reconciliation <ul style="list-style-type: none"> • Reconciliation Compliance 	Account Reconciliation <ul style="list-style-type: none"> • Reconciliation Compliance • Transaction Matching
Financial Consolidation and Close <ul style="list-style-type: none"> • Supplemental Data Management • Financial Consolidation • Close Management 	Financial Consolidation and Close <ul style="list-style-type: none"> • Supplemental Data Management • Financial Consolidation • Close Management • Support for complex ownership structures and custom calculations
Narrative Reporting <ul style="list-style-type: none"> • Report Packages • Management Reporting 	Narrative Reporting <ul style="list-style-type: none"> • Disclosure Management • Report Packages • Management Reporting
	Enterprise Data Management Cloud
	Profitability and Cost Management
	Tax Reporting

EPM Standard Cloud Service

EPM Standard Cloud Service is a suite of business processes, primarily for small and mid-sized businesses, and for businesses with lower complexity requirements to support planning and budgeting, consolidation and close, account reconciliation, and narrative reporting processes.

The following image presents an overview of the business processes available in EPM Standard Cloud Service:

EPM Standard Cloud Service	
Includes	Excludes
<ul style="list-style-type: none"> • Module-based Planning <ul style="list-style-type: none"> • Capital • Financials • Projects • Workforce • Strategic Modeling • Hybrid BSO Cubes and ASO Reporting Cubes 	<ul style="list-style-type: none"> • Custom Planning • Free Form Planning • Groovy Support
Account Reconciliation	Transaction Matching
Financial Consolidation and Close (with default, built-in calculations)	<ul style="list-style-type: none"> • Custom Consolidations • Intelligent Process Automation • Intelligent Performance Management
Narrative Reporting	Disclosure Management

Additionally, Data Management, which enables you to integrate data from source systems, is included with EPM Standard Cloud Service. Clients and command line tools, such as Oracle Smart View for Office and EPM Automate, are also included.

An EPM Standard Cloud Service instance allows you to deploy and use one of the supported business processes. To deploy another business process, you must request another EPM Standard Cloud Service subscription or remove the current business process.

Watch this video learn more about all of the value in EPM Standard Cloud Service and EPM Enterprise Cloud Service.

In the EPM Standard Cloud Service, you deploy one of the following business processes.

Planning

The Planning business process delivers instant value and greater productivity for business planners, analysts, modelers, and decision-makers across all lines of business of an enterprise.

Planning is available with:

- Capital
- Financials
- Projects
- Workforce
- Strategic Modeling

With the exception of Strategic Modeling, these are available with preseeded configurable content including dimensions, models, forms, rules, dashboards, infolets, and reports. Strategic Modeling is available with standard and industry templates that can be leveraged to create a customized scenario models with flexible blended scenario business cases.

The Planning business process available in the EPM Standard Cloud Service does not support the following:

- Custom Planning, which allows a high degree of application customization to support business requirements
- Free Form Planning, which enables you to deploy Planning applications with no dimension requirements and also create applications using Essbase outline files
- Use of the Groovy scripting language to create or customize business rules

See [Overview of Planning \(Planning and Budgeting Cloud\)](#).

Watch this video for an overview of Planning in EPM Standard Cloud Service.



[Overview: Planning in EPM Standard Cloud](#)

Account Reconciliation

The Account Reconciliation business process enables you to automate the validation of financial accounts by checking the accuracy of account balances.

This business process does not include the Transaction Matching module, which automates the process of reconciling high volume or labor intensive reconciliations and integrating results into the tracking features within Reconciliation Compliance.

See [Overview of Account Reconciliation](#).

Watch this video for an overview of Account Reconciliation.



[Overview: Tour of Account Reconciliation](#)

Financial Consolidation and Close

The Financial Consolidation and Close business process supports consolidation and close process tasks with default, prebuilt calculations; you cannot create custom calculations.

The Financial Consolidation and Close business process available in the EPM Standard Cloud Service does not support the following:

- Custom consolidation calculations and complex ownership structures
- Automation of consolidation and close tasks
- Intelligent process automation by integrating Task Manager with other services

See [Overview of Financial Consolidation and Close](#).

Watch this video for an overview of Financial Consolidation.



[Overview: Tour of Financial Consolidation](#)

Narrative Reporting

The Narrative Reporting business process, previously known as Oracle Enterprise Performance Reporting, provides a secure, process-driven approach for defining, authoring, reviewing, and publishing financial and management report packages.

The Narrative Reporting business process available in the EPM Standard Cloud Service does not support Disclosure Management.

See [Overview of Narrative Reporting](#).

Watch this video for an overview of Narrative Reporting.



[Overview: Narrative Reporting in Oracle Enterprise Performance Management Cloud](#)

Business Processes not Available in the EPM Standard Cloud Service

The following business processes are available in the EPM Enterprise Cloud Service only:

- Profitability and Cost Management
- Tax Reporting
- Enterprise Data Management

EPM Enterprise Cloud Service

The EPM Enterprise Cloud Service comprises the full suite of Oracle Enterprise Performance Management Cloud business processes supporting a comprehensive array of activities spanning planning and budgeting, consolidation and close, account reconciliation, profitability and cost management, tax reporting, enterprise data management, and narrative reporting.

The following image presents an overview of the business processes and modules available in the EPM Enterprise Cloud Service:

EPM Enterprise Cloud Service	
Planning	<ul style="list-style-type: none"> • Custom Planning (with support for Strategic Modeling) • Module-based Planning (Capital, Financials, Projects, Workforce, Strategic Modeling) • Free Form Planning • Hybrid BSO Cubes and ASO Reporting Cubes • Groovy support for customizing business rules
Account Reconciliation	Includes Transaction Matching
Financial Consolidation and Close	<ul style="list-style-type: none"> • Default and Custom Consolidation Calculations • Support for Complex Structures • Integration of Close Manager with Other Oracle Products
Narrative Reporting	Includes Disclosure Management
Enterprise Data Management Cloud	(with maximum 5000 hosted records)
Profitability and Cost Management	
Tax Reporting	

An EPM Enterprise Cloud Service instance allows you to deploy and use one of the supported business processes. To deploy another business process, you must request another EPM Enterprise Cloud Service instance or remove the current business process. The business processes that you deploy share the same identity domain to facilitate user management and provisioning. Access to resources belonging to a business process is individually controlled for each business process.

The EPM Enterprise Cloud Service allows you to deploy the following business processes.

Planning

EPM Enterprise Cloud Service supports custom Planning, module-based Planning, and Free Form planning to deliver instant value and greater productivity for business

planners, analysts, modelers, and decision-makers across all lines of business of an enterprise.

Custom Planning facilitates creation of a streamlined process-driven custom solution. Module-based Planning comes bundled with pre-packaged Capital, Financials, Projects, Strategic Modeling, and Workforce modules.

Free Form Planning helps you to create an unrestricted free form dimension solution using an Essbase outline file. Additionally, EPM Enterprise Cloud Service supports the use of the Groovy scripting language to customize business rules in the Planning business process.

See [Overview of Planning \(Planning and Budgeting Cloud\)](#).

Account Reconciliation

You use the Account Reconciliation business process with transaction matching support to automate the process of validating your company's financial accounts by checking the account balances for accuracy. Transaction matching helps automate the process of reconciling high volume or labor intensive reconciliations and integrating results into the tracking features within reconciliation compliance.

Features such as reconciliations, including auto reconciliations, variance analysis, alerts and exception management, and auto-matching of transactions are available in the EPM Enterprise Cloud Service.

See [Overview of Account Reconciliation](#).

Financial Consolidation and Close

The Financial Consolidation and Close business process supports consolidation and close process tasks with default, prebuilt calculations. You can create custom calculations and complex ownership structures and automate consolidation and close tasks.

Financial Consolidation and Close comes bundled with Supplemental Data Manager and Close Manager modules. Supplemental Data Manager helps create and manage data set definitions, input templates, data collection, and value linking.

Financial Consolidation and Close also supports the integration of Close Manager with other services.

See [Overview of Financial Consolidation and Close](#).

Narrative Reporting

The Narrative Reporting business process with Disclosure Management provides a secure, process-driven approach for defining, authoring, reviewing, and publishing financial and management report packages.

See [Overview of Narrative Reporting](#).

Enterprise Data Management

The Enterprise Data Management business process helps you manage business viewpoints, govern changes across them, share and map data sets to accelerate deployment, and build an authoritative system of reference.

Your subscription for EPM Enterprise Cloud Service supports using Oracle Enterprise Data Management Cloud with up to 5,000 records across all provisioned

environments. The Enterprise Data Management business process is intended for trial purposes within this subscription. For most production use cases, Oracle Enterprise Data Management Cloud should be purchased standalone. An existing deployment of this business process cannot be extended by purchasing additional records. You need to switch to standalone Oracle Enterprise Data Management Cloud and purchase a subscription to match the desired record count to the nearest 1000 hosted records.

See [Overview of Oracle Enterprise Data Management Cloud](#).

Profitability and Cost Management

The Profitability and Cost Management business process helps you manage the cost and revenue allocations that are necessary to compute profitability for a business segment, such as a product, customer, region, or branch.

See [Overview of Profitability and Cost Management](#).

Tax Reporting

The Tax Reporting business process calculates your company's global tax provision, effective tax rate, and deferred tax for tax provisioning purposes in accordance with the standards for accounting for income taxes under GAAP and IFRS.

See [Overview of Tax Reporting](#).

New EPM Cloud URL

Customers provisioned to EPM Standard Cloud Service and EPM Enterprise Cloud Service instances will use URLs similar to the following to access their environments:

Production environment URL: `https://epm-idDomain.epm.dataCenter.oraclecloud.com/epmcloud`

Test environment URL: `https://epm-test-idDomain.epm.dataCenter.oraclecloud.com/epmcloud`

For example, for Oracle Enterprise Performance Management Cloud environments provisioned with identity domain `exampleDoM` in `exampleDC` data center, the URLs may be as follows:

Production environment: `https://epm-exampleDoM.epm.exampleDC.oraclecloud.com/epmcloud`

Test environment: `https://epm-test-exampleDoM.epm.exampleDC.oraclecloud.com/epmcloud`

A Service Administrator is responsible for providing the unique URLs to users.

This is a change from previous versions of EPM Cloud where each business process used a separate context to access environments. See [Sample EPM Cloud URLs](#).

Using the EPM Cloud Features Tool to View the Features Released Each Month

Use the [EPM Cloud Features tool](#) to view a list of features released each month for your Oracle Enterprise Performance Management Cloud business process. You can

perform text searches and click links to read more about each feature in the What's New document and the EPM Cloud guides.

Product Name and Terminology Changes

EPM Standard Cloud Service and EPM Enterprise Cloud Service has introduced some product name and terminology changes, which may not be reflected in the user assistance collaterals, such as guides, learning paths, videos, screen shots, and online help.

Table 1-1 Product Name and Terminology Changes

Old Terminology	New Terminology
Planning and Budgeting Cloud	Planning
Enterprise Planning and Budgeting Cloud	Planning
Enterprise Planning and Budgeting Cloud business processes; for example, Workforce	Planning Modules
Enterprise Performance Reporting Cloud	Narrative Reporting
Cloud Service	Business process

2

Understanding EPM Cloud Components

Oracle Enterprise Performance Management Cloud combines Oracle's Enterprise Performance Management applications with the innovation and simplicity of the cloud to enable companies of any size to drive predictable performance, report with confidence, and connect the entire organization.

In This Section:

- [Overview of EPM Cloud](#)
 - [Overview of Planning \(Planning and Budgeting Cloud\)](#)
 - [Overview of Planning Modules](#)
 - [Overview of Financial Consolidation and Close](#)
 - [Overview of Tax Reporting](#)
 - [Overview of Profitability and Cost Management](#)
 - [Overview of Account Reconciliation](#)
 - [Overview of Oracle Enterprise Data Management Cloud](#)
 - [Overview of Narrative Reporting](#)
- [Setting Up Browsers for EPM Cloud](#)
 - [Supported Browsers](#)
 - [Browsers on Mobile Devices](#)
 - [Minimum Screen Resolution](#)
- [Accessing EPM Cloud](#)
 - [Authenticating Using Oracle Cloud Credentials](#)
 - [Authenticating Using Single Sign-On Credentials](#)
- [Turning on Accessibility Mode](#)
- [Sample EPM Cloud URLs](#)
- [Information Sources](#)
 - [Oracle Cloud Help Center](#)
 - [Oracle Learning Library](#)
- [Understanding EPM Cloud Localization](#)

Overview of EPM Cloud

Oracle Enterprise Performance Management Cloud offers the following services:

- [Planning](#)
- [Planning Modules](#)

- [Financial Consolidation and Close](#)
- [Tax Reporting](#)
- [Profitability and Cost Management](#)
- [Account Reconciliation](#)
- [Oracle Enterprise Data Management Cloud](#)
- [Narrative Reporting](#)

About Services and Environments

You buy a service to work with EPM Cloud. Each service entitles you to two environments—a test environment and a production environment.

Overview of Planning (Planning and Budgeting Cloud)

Planning is a subscription-based planning and budgeting solution built for and deployed on Oracle Cloud, using a proven, flexible planning and reporting best-in-class architecture. It delivers instant value and greater productivity for business planners, analysts, modelers, and decision-makers across all lines of business of an enterprise. Users interact through a Web 2.0 or Microsoft Office interface to model, plan, and report. The service, built to scale and perform, uses industry-standard Oracle Cloud infrastructure.

Proven Platform and Technology

The service helps companies plan their cloud strategy efficiently by avoiding data and business process fragmentation. It is built to optimize Oracle Cloud resources. The service's functional architecture is based on the proven Planning platform, which helps solve simple to complex planning use cases across numerous industries. In Oracle Cloud, enterprise-wide user profiles can be maintained in one place so that they can be reused across all Oracle Cloud Services to which an organization subscribes.

Best-in-Class Functionality

The service offers an intuitive Web 2.0 and Microsoft Office interface for driver-based modeling, rolling forecasts, and management reporting for time-sensitive and goal-oriented planning activities. You can easily create and share on-the-fly models and validate them against sophisticated statistical predictive capabilities, thus generating unbiased, accurate, and agile plans. This service is built for real-time collaborative planning and variance analysis across the enterprise, using powerful annotations, commentary, document attachments, tasks, workflow, and reporting capabilities.

Scalable and Flexible

The service leverages the powerful Essbase OLAP calculation engine and a comprehensive rules framework to enable fast processing of complex calculations for large volumes of data. Time and data intelligence built into the service provides out-of-the-box spreading and fast on-demand aggregation capabilities. By creating and sharing on-the-fly models, you can quickly build and collaborate using Microsoft Excel and Web interfaces.

Enterprise Ready

The service is a one-stop cloud service to build, deploy, and manage business planning activities for any size organization. It supports small- to large-scale

deployment, data backup and migration, plus packaged Enterprise Resource Planning (ERP) data integration capabilities without compromising ease of use or self-service for smaller customers. This service includes comprehensive features to raise issues, get support, and seek product enhancements. It provides flat-file and Excel-based import and export, and comprehensive mapping capabilities for more sophisticated data integration use cases. You can seamlessly load and extract information, and you can drill back to source ERP.

Rapid Deployment

The service lets you get started immediately, because it requires no initial investment. Your subscription includes everything that you need. You don't need to license, install, upgrade, or patch software. You don't have to buy, install, or configure hardware. You can also leverage the deep product expertise of the worldwide Oracle Hyperion Partner network to develop and deploy cloud-based planning applications in weeks, using quick-start templates.

Portability

Existing Planning customers can leverage built-in migration capabilities to port their on-premises Planning application to the service. This capability also enables organizations to introduce or extend Planning usage across the enterprise to other lines of businesses without additional demands on their IT resource and budgets.

Watch this video for an overview of key Planning features.



[Overview Tour Video](#)

Overview of Planning Modules

Planning Modules comprise complete planning and budgeting solutions for Financials, Workforce, Capital, and Projects. These business processes include built-in best practice predefined content including forms, calculations, dashboards, drivers, and key performance indicators (KPIs). Forms are designed to integrate with the dashboards and reports that dynamically reflect your data, plans, and forecasts.

Watch this overview video to learn more about Planning Modules.



[Overview Tour Video](#)

Financials

The Financials solution provides integrated driver-based planning for income statement, balance sheet, and cash flow. The out-of-box tools, such as KPIs, drivers, and accounts help you prepare reports faster. You can also use Financials to perform expense and revenue planning.

Watch this video to learn more about Financials.



[Overview Tour Video](#)

Workforce

The Workforce solution enables headcount and compensation planning to link financial plans with the workforce plan. You can budget for future headcount and related personnel expenses such as salary, benefits, and taxes.

Watch this video to learn more about Workforce.



[Overview Tour Video](#)

Projects

The Projects solution bridges the gap between project planning systems and the financial planning process. It helps you assess the impact organizational projects and initiatives have on overall resources to ensure they align with short and long term financial targets.

Watch this video to learn more about Projects.



[Overview Tour Video](#)

Capital

The Capital solution helps you plan for the long-term impact of capital assets on financial plans to manage, prioritize, and plan for capital expenses.

Watch this video to learn more about Capital.



[Overview Tour Video](#)

Strategic Modeling

The Strategic Modeling solution combines a set of rich financial forecasting and modeling features with built in on-the-fly scenario analysis and modeling capabilities for long-term strategic planning.

Watch this video to learn more about Strategic Modeling.



[Overview Tour Video](#)

You might not see all the features described in this guide depending on what your Service Administrator has enabled. Service Administrators can incrementally enable some features, which adds additional forms, dashboards, KPIs, rules, and so on.

Overview of Financial Consolidation and Close

Financial Consolidation and Close is a subscription-based consolidation and reporting solution built for and deployed on Oracle Cloud. It provides a simple and quick deployment for users who want fast implementation with no hardware and minimal IT support. It provides a user-friendly and intuitive interface along with built-in functionality for consolidation and close process tasks.

Financial Consolidation and Close provides these features:

- Simplified tablet user interface
- Native dashboarding and analysis
- Predefined dimensions for detailed analysis
- Flexible application configuration with pre-built forms and reports
- Currency translations and FX adjustment calculations
- Automated cash flow

- Dynamic out-of-box calculations with limited need for customization
- Simplified Consolidation dimension for easy audit
- Close calendar task management and workflow
- Supplemental schedule data management

View this video to get an overview of the consolidation and close process.



[Overview Tour Video](#)

Overview of Tax Reporting

Tax Reporting provides a total tax solution to calculate and analyze current and deferred tax at national and regional levels, while unifying your financial close and tax close processes. This application is designed to comply with the standards for accounting for income taxes under GAAP and IFRS.

In a multinational business, regional controllers calculate current and future tax according to local tax laws at the legal entity level. These expenses are then aggregated to national levels. Some jurisdictions may provide for tax filings at a combined level, requiring review and approval at an aggregate level. Tax Reporting provides the out-of-the-box forms, logic, provision packages, workflow, and analysis dashboards that will enable you to source, calculate, manage, and approve your tax provision. The application calculates your company's global tax provision, effective tax rate, and deferred tax for tax provisioning purposes. You can also prepare CbCR reporting (Country by Country).

Tax Reporting encompasses all stages of your organization's tax provision process, including tax automation, data collection, tax provision calculation, return-to-accrual automation, and tax reporting and analysis. The application enables you to calculate the effective tax rate and cash tax for entities within your jurisdictions, and prepare accounting journals and accompanying financial statement disclosures.

You define sequential and logically grouped tasks for all tax preparation activities, such as reviewing permanent adjustments, temporary differences, and effective tax rates, as follows:

- Use the **National Tax Provision** package to:
 - Use the dashboards to view current and prior year tax expenses for your entities, and view statutory and effective tax rates.
 - Use entity specific provision packages to determine current and future tax expense and liability.
- Use the **Statutory Effective Tax Rate** analysis in a national or regional provision package to identify the effective rate of tax paid on your pre-tax profits.
- Use the **Regional Provision** package determine and analyze existing and deferred tax requirements for a particular US state, or province.
- Use **Deferred Tax** to view future expenses and liabilities. You can drill down on closing balance to access additional details including current year movement, and return to accrual adjustments.
- Use **CbCR reporting** to analyze your tax expense across jurisdictions, including factors such as return on equity, and revenue by employee.



[View this video to get an overview of the Tax Reporting process.](#)

Overview of Profitability and Cost Management

To maximize profitability, a business must be able to accurately measure, allocate, and manage costs and revenue. Profitability and Cost Management is an analytic software tool that manages the cost and revenue allocations that are necessary to compute profitability for a business segment, such as a product, customer, region, or branch. Profitability and Cost Management enables you to use cost decomposition, consumption-based costing and scenario-playing to measure profitability for effective planning and decision support.

Watch this video to get an overview of Profitability and Cost Management.



[Overview Tour Video](#)

Profitability and Cost Management applications are designed for use by analysts who have deep domain experience in the computation and reporting methods of management reporting, but who may not have much experience with Essbase and scripting syntax or programming languages.

Data for Profitability and Cost Management applications is housed in both multidimensional databases and relational databases.

Overview of Account Reconciliation

Reconciliations ensure that a company's financial accounts are validated by checking to see if the balance in the account is correct. Oracle Account Reconciliation Cloud Service makes this process simpler and faster for companies by automating the process and helping users involved in the process collaborate effectively.

Because account balances are valid at a point in time, and business conditions change, it is critical that reconciliations occur. In addition, companies face stiff penalties for failing to reconcile.

Account Reconciliation consists of two modules: Reconciliation Compliance and Transaction Matching.

Watch this video to get an overview of Account Reconciliation.



[Overview Tour Video](#)

Reconciliation Compliance

Reconciliation Compliance helps you manage account reconciliation processes, including balance sheet reconciliations, consolidation system reconciliations, and other reconciliation processes in effect.

Reconciliations can be performed at whatever level makes sense for the business. For example, you could perform some reconciliation by business unit or company code, while performing other reconciliations at the department level. An administrator can create mapping rules to assign the account balances to the reconciliations, and when balances are imported, ensure they appear in the correct reconciliation based on these rules.

The administrator sets up the reconciliation lists that contain the balances to be reconciled, as well as account descriptions, instructions, due dates, and completed dates. Email notifications are sent, reminding other users that due dates are approaching, or that reconciliations can be acted upon.

Transaction Matching

Transaction Matching is an integrated module of Account Reconciliation and the perfect complement to the existing Reconciliation Compliance feature set.

With Transaction Matching, companies can automate performance of high volume/labor intensive reconciliations, and seamlessly integrate those results into the tracking features within Reconciliation Compliance.

With the addition of this powerful new module, companies save additional time on the performance of reconciliations, while improving quality and reducing risk.

Overview of Oracle Enterprise Data Management Cloud

Oracle Enterprise Data Management Cloud is a modern, agile data management application that enables enterprises to manage application-specific business viewpoints, govern changes across them, share and map data sets to accelerate cloud deployment, and build an authoritative system of reference.

Note:

You can use Oracle Enterprise Data Management Cloud as a standalone service or as a business process within Oracle Enterprise Performance Management Cloud.

Work with Applications

Application creators register each connected business application to generate end user experiences called a default view. Upon registration, creators can assign others as application owners or data managers. Each view contains one or more viewpoints that are optimized to maintain each registered application dimension as a list or a hierarchy. To collaborate, application owners and view owners may then come together to tailor custom views and viewpoints (for example, by subject area or by business domain) to build change management views. Data managers may then apply changes within their purview.

Work with Views and Viewpoints

Views are end user portals into enterprise data. Browse or search viewpoints within or across views. Import dirty dimension data into viewpoints from contributing applications, validate and resolve issues to build an authoritative system of reference. Compare viewpoints side-by-side to understand differences. Align related properties visually and copy values. Create requests to share data across viewpoints. Use subscriptions to share data between viewpoints by subscribing a target viewpoint to a source viewpoint. When an update is made to the source viewpoint, a request is automatically generated to make the same change in the target viewpoint.

Manage Change with Requests

Requests represent the fundamental building block of change. Use requests to model changes to any viewpoint. Visualize all changes against the target viewpoint, validate them, analyze impact, and only then commit them. Author changes interactively or in batch from file sources. Browse request activity to audit committed changes.

Collaborative Workflows

Collaborative workflows support a submit process, approval process and address these governance challenges:

- Configure one or more approval policies at the application, dimension, hierarchy set, or node type level. The workflow orchestrates the invitation of approvers while executing approval policies concurrently to achieve high quality outcomes.
- Implement request workflows across multiple business contexts to secure approval for related changes across applications.
- Use approvals with subscription requests to simulate application dimension-level enrichment and approval stages across multiple application contexts.
- Define items within a request that are validated, approved, and committed together. This creates integrity in change management and enables change control.

Create Alternate Views and Viewpoints

Tailor custom views and viewpoints to build alternate hierarchies, access read-only reference data for comparison purposes, or work with hierarchy members in a list. Copy viewpoints to make a historical snapshot, perform a what-if scenario, or reorganize data as fit-for-purpose.

Information Model

Each viewpoint is powered by a data chain that specifies associated business objects (using node types), associated parent child relationships (using relationship sets), and associated predicates such as top nodes (using node sets) to construct each viewpoint for end use. Viewpoints are grouped together logically in views that either represent business applications or subject areas. Application views are defaulted based upon application registration.

Build Data Maps

Create new data chains to manage mapping relationships. Construct mapping viewpoint to map one or more sources to each target application dimension. Compare source to target and create requests to build data maps across applications. Configure mapping keys and locations for each target dimension to export data maps.

Application Integration

Accelerate integration with EPM Cloud applications, for example, Planning, Financial Consolidation and Close, E-Business Suite General Ledger and Oracle Financials Cloud General Ledger, using predefined application registration. Leverage a custom application registration using an open interface to integrate with all other business applications. Use a wizard-driven configuration experience to onboard applications: establish reusable connections, configure import and export operations, and construct

ready-to-use, application-specific views for immediate application maintenance purposes.

Automate Tasks



Automate tasks interactively or via a scheduled process using the EPM Automate. For example, migrate across service instances, upload and download files, reset an environment and re-create an environment.

Audit Transaction History

Transaction history can be audited to see changes made to nodes, properties, and relationships over time. Transaction history is recorded when requests are committed. You can view, filter, and download transaction history to a file.

Expressions for Custom Business Logic

Expressions are used to define custom business rules for nodes in particular applications. Expressions can be configured for derived properties and property transformations to calculate property values for nodes in viewpoints. Expressions are defined in a graphical manner using a palette and an editor.

Your Goal	Watch this Video
Get an overview of Oracle Enterprise Data Management Cloud	 Overview Tour Video
Understand the user interface of Oracle Enterprise Data Management Cloud	 Overview Tour Video

Overview of Narrative Reporting

Narrative Reporting is an Oracle Cloud solution for management and narrative reporting. It provides a secure, collaborative, and process driven approach for defining, authoring, reviewing and publishing financial and management report packages. In addition, Narrative Reporting offers multidimensional analytics, and you can choose to store, analyze, and source data from the Cloud via built-in analytics or use your own existing data sources for analyzing and authoring doclet content.

Key benefits:

- **Combine Data and Narrative:** Use report packages and doclets to address authoring, collaboration, commentary, and delivery needs.
- **Collaborate Securely:** Gives report contributors access to content based on their role and insures that sensitive content is secure. Also, lets report owners see the progress of the reporting lifecycle.
- **Report Confidently:** Allows you to trust that the data is reliable and accurate while providing faster, more accurate insights to all stakeholders.

Watch this video to get an overview of Narrative Reporting.

 [Overview Tour Video](#)

Overview of Strategic Workforce Planning

Oracle Strategic Workforce Planning Cloud, a part of the Oracle Fusion Human Capital Management family, translates long-term corporate strategy into execution plans by ensuring that the strategy is supported by the right workforce—the right skill sets and headcount at the right time.

You look at long-term demand for resources by exploring scenarios that impact those demands. You also look at what's going to happen with your current workforce, for example, through retirement or natural attrition. Evaluating demand against supply helps you understand what gaps there may be—positive or negative—so that you can proactively plan for needed resources. You can anticipate the headcount and skills needed to support your business strategy.

Strategic Workforce Planning provides configurable drivers and demand thresholds that enable planners to answer such questions as, “Do our employees have the right skill sets to accomplish future plans?” and “Will expected expenses and revenues support our plans?”. You select the best calculation logic for each driver, which translates driver values to future long-term full-time equivalent (FTE).

Watch this video to learn about Strategic Workforce Planning.



[Overview Tour Video](#)

You can also enable Workforce to manage and track headcount expenses. You can then align critical corporate resources—people and dollars—with the strategies that best leverage a competitive advantage. Departments can collaborate to plan headcount and related expenses such as salaries, health care, bonuses, and taxes. Planners can see up-to-date graphics that show expenses and trends.

If Workforce is enabled with all its features, planners can manage and track headcount expenses:

- Analyze, calculate, and report on headcount, salary, bonuses, taxes, and health care expenses
- Plan for hires, transfers, promotions, terminations, and so on
- Define country-appropriate taxes and benefits

Overview of Sales Planning

Oracle Sales Planning Cloud provides an extensible framework for planning and managing sales performance.

Using Sales Planning enables you to automate critical processes by eliminating spreadsheets in key sales operations processes and improves collaboration for planning and modeling sales quotas.

Sales Planning is extensible using the EPM Cloud framework to further add additional configurations and personalization into your sales planning application with custom navigation flows, dashboards, and infolets. Use tasks and approvals to manage the quota planning process. Use Groovy rules to customize even further for enhanced calculation and business rules. Sales Planning can be integrated with Oracle Engagement Cloud – Sales Cloud for pushing quota targets to incentive compensation or bring in actual attainment.

Watch this overview video to learn more about Sales Planning.



[Overview Tour Video](#)

About Quota Planning

The Quota Planning business process offers top-down and bottom up target quota planning by territory, product, account, or other custom dimensions. Use Predictive Planning and what if scenario planning to explore and compare different quota scenarios for informed decision making. Quota Planning builds best practices into its content, including its forms, calculations, dashboards, infolets, drivers, and measures.

Quota Planning helps you plan reliable target quotas by engaging all of the participants of the process, for example, the VP of Sales, Sales Operations, Sales Managers, and Sales Reps. Set a target quota for the next year. Then, optimize your results by making adjustments by product, applying padding or seasonality, or performing predictive planning or what-if analysis. When the target is ready, planners perform top-down or waterfall planning to allocate the target quota throughout the hierarchy.

If needed in your organization, you can also perform bottom up planning to get quota commitments from Sales Reps, allowing a collaborative approach. After the target quotas are pushed up to the next level of the hierarchy and aggregated, you can compare top down and bottom up results. Use the built-in dashboards to analyze and evaluate your quota plans with quota attainments.

Enhance the planning process in your organization by adding additional measures, task lists, or approvals.

Watch this video to learn about Quota Planning.



[Overview Tour Video](#)

About Sales Forecasting

Advanced Sales Forecasting provides a robust platform for the sales forecasting process, allowing multidimensional sales forecasting across territory, products, accounts, channels, or other custom dimensions. It offers sales teams connected sales planning with integration between Quota Planning, compensation planning, and sales forecasts. With Advanced Sales Forecasting, you can plan at the weekly or monthly level, and use a rolling forecast if your business requires it. It offers these key features:

- Out-of-box best practice content for sales forecasting and analysis, including metrics, KPIs, and measures to help data-driven sales forecasting across the Sales hierarchy.
- Extensibility using the Planning Cloud platform, allowing additional configurations, such as custom forms and dashboards, measures, dimensions, navigation flows, and Groovy rules for custom calculations.
- Ability to adjust forecast commitment at the territory level or detailed level (for example, by product or account) to facilitate collaborative data-driven forecast commitment.
- Predictive Planning to take the guesswork out of your forecasting.
- Oracle Smart View for Office, which provides a common Microsoft Office interface designed specifically for Oracle Enterprise Performance Management Cloud, including Sales Planning.

- Instantaneous aggregations and reporting using out-of-box reporting cube.
- Advanced Sales Forecasting ensures greater reliability in your forecasts, and accountability and collaboration between Sales Management and Sales Reps.

Setting Up Browsers for EPM Cloud

Related Topics

- [Supported Browsers](#)
Lists the supported and recommended browsers for Oracle Enterprise Performance Management Cloud.
- [Browsers on Mobile Devices](#)
- [Minimum Screen Resolution](#)

Supported Browsers

Lists the supported and recommended browsers for Oracle Enterprise Performance Management Cloud.

Table 2-1 Supported Browsers for Each Client Platform

Client Platforms	Recommended Browser	Other Supported Browsers
Windows 8, 8.1, and 10	Google Chrome	Firefox ESR Microsoft Edge Version 80 or newer
Apple Mac OS10.12.x (Sierra)	Google Chrome	Safari, Firefox ESR
Linux (all versions)	Google Chrome	Firefox ESR
iOS devices 9.x through 11.x	Safari	None
Android devices version 4.4..x, through version 7.x	Google Chrome	None

To ensure access to the service, you must configure your browser to:

- Accept cookies from `oraclecloud.com` and `cloud.oracle.com`
By default, the browsers are set up to accept cookies from websites. If your browser is configured to not accept cookies from sites, you must allow a per session or permanent exception for these sites
- Allow pop-up windows from `oraclecloud.com` and `cloud.oracle.com`

About Duplicating Firefox and Chrome Tabs

A **Duplicate Tab** command is available in Firefox and Chrome browsers to spawn another instance of the current tab. Oracle does not recommend using this command to duplicate the current view of a business process because it may cause EPM Cloud business process to display an error.

Configuring Google Chrome for a Localized Version of the Service

You update the language settings of Google Chrome to access the service in a language other than the default browser language. For a list of languages in which the service is available, see [Understanding EPM Cloud Localization](#).

To reconfigure Chrome for a new locale:

1. In Google Chrome, access Settings by navigating to the following URL:
`chrome://settings/`
2. Click **Settings**, then **Advanced**, and then **Languages**.
3. From **Language** drop-down list, select **Add Languages**.
4. In **Add Languages**, select the display language for the service and then click **ADD**.
5. Click **More actions** next to the display language for the service that you added in the preceding step and then select **Display Google Chrome in this Language**.
6. Click **RELAUNCH** .
Google Chrome restarts in the selected language.

Configuring Microsoft Edge

You update the language settings of Microsoft Edge to access Oracle Enterprise Performance Management Cloud in a language other than the default browser language.

General Settings

Make sure that Microsoft Edge is configured to allow JavaScripts, cookies, and pop-ups. These are allowed by default.

- If your organization does not allow the default setting, make sure to add `*.oraclecloud.com` as an allowed site. You can view the current JavaScript setting by entering the URL `edge://settings/content/javascript`
- If popups are blocked, make sure to add `*.oraclecloud.com` as an allowed site. You can view the current popup setting by entering the URL `edge://settings/content/popups`
- If the use of cookies is blocked, add `*.oraclecloud.com` as a site from which cookies should be accepted. You can view the current cookie setting by entering the URL `edge://settings/content/cookies`

Configuring Microsoft Edge for a Localized Version of the Service

For a list of languages in which the service is available, see [Understanding EPM Cloud Localization](#).

To configure Microsoft Edge for a new locale:

1. Open your Microsoft Edge browser and enter the following URL
`edge://settings/languages`
2. If the locale you want to use is not listed under **Preferred languages**, click **Add languages** and add it.
3. Under **Preferred languages**, click **...** (**More actions**) in the row of the locale you want Microsoft Edge to use, and then select **Display Microsoft Edge in this language**.
4. Click **Restart**.

Configuring Firefox

Configuring Firefox involves enabling Oracle Enterprise Performance Management Cloud pop-ups and modifying privacy settings.

Firefox, by default, is configured to accept cookies from websites. If your browser is configured to not accept cookies from sites, you must allow a per-session or permanent exception for `cloud.oracle.com` and `oraclecloud.com`. You must also allow Firefox to open pop-up windows from these websites.

To configure Firefox to accept cookies and enable pop-ups:

1. Start Firefox
2. Select **Tools**, then **Options**, and then **Privacy**.
3. Verify the setting in the **Firefox will** field:
 - If the value is set to **Remember history** or **Never remember history**, your browser will use default settings to correctly display the service.
 - If the value is set to **Use custom settings for history**:
 - Verify that the **Accept cookies from sites** check box is selected (checked).
 - Click **Exceptions**, and remove any exception that prevents the following websites from setting cookies:
 - * `cloud.oracle.com`
 - * `oraclecloud.com`

If the **Accept cookies from sites** check box is not selected, complete the following steps:

 - a. Click **Exceptions**.
 - b. In **Address of web site**, enter `cloud.oracle.com`, and then click either **Allow** or **Allow for session**, depending on your privacy policies.
 - c. Repeat step 3.b to add `oraclecloud.com`.
 - d. Click **Save Changes**.
4. Enable pop-up windows from `cloud.oracle.com` and `oraclecloud.com`, and, optionally, enable pages to choose their own fonts.
 - a. Click **Content**.
 - b. If **Block pop-up windows** is selected (checked), click **Exceptions**.
 - c. In **Address of web site**, enter `oraclecloud.com`, and then click **Allow**.
 - d. In **Address of web site**, enter `cloud.oracle.com`, and then click **Allow**.
 - e. Click **Save Changes**.
 - f. **For Narrative Reporting only**: enable pages to choose their own fonts.
 - i. Click **Advanced** under **Fonts & Colors**.
 - ii. Select **Allow pages to choose their own fonts, instead of my selections above**.
 - iii. Click **OK**.

Configuring Firefox for a Localized Version of the Service

You update the language settings of Firefox to access Oracle Enterprise Performance Management Cloud in a language other than the default browser language.

For a list of languages in which the service is available, see [Understanding EPM Cloud Localization](#).

Note:

Narrative Reporting can override the browser locale by setting a preferred locale. See Managing User Preferences in *Administering Narrative Reporting* for details.

To modify language settings:

1. In Firefox, select **Tools**, and then **Options**.
2. Click **Content** to open the Content page.
3. Click **Choose** next to **Languages**.
4. **Optional:** If the language that you want to use is not listed in **Languages**, add it using these steps:
 - a. In **Languages**, click **Select a language to add...**
 - b. Select the desired language, and then click **Add**.
5. Click the desired language and then click **Move Up** to move it to the top of the list.
6. Click **OK**.

Browsers on Mobile Devices

Only Google Chrome (on Android mobile devices) and Apple Safari (on iPads) are supported for mobile devices. See [Oracle Mobile Application Framework](#) web site and then click the current version (for example, MAF 2.6.1) to open the Oracle Mobile Application Framework Documentation page. Click [Certification Information](#) for a list of supported devices.

Minimum Screen Resolution

Ensure that the screen resolution of your display unit is set to 1024 x 768 or higher.

Accessing EPM Cloud

You can access an environment using Oracle Cloud or Single Sign-On credentials.

- Using Oracle Cloud credentials. See [Authenticating Using Oracle Cloud Credentials](#).
- Using network credentials if your organization configured Single Sign-On (SSO) access. See [Authenticating Using Single Sign-On Credentials](#).

SSO access between Oracle Enterprise Performance Management Cloud and deployments of Oracle Fusion and NetSuite is also available. Additionally, SSO can be provided by integrating your services with Oracle Identity Cloud Service. See "Managing Single Sign-On" in *Administering Oracle Cloud Identity Management* for information on configuring the SSO process to work with the identity provider that your organization uses. Additionally, your IT administrator may configure browsers for Integrated Windows Authentication (IWA) to allow you to access the service without entering your credentials.

**Note:**

Clients such as the EPM Automate do not work with SSO credentials. The user accounts for accessing such clients must be maintained in EPM Cloud.

Authenticating Using Oracle Cloud Credentials

The first time you log in, check the email from Oracle Cloud Administrator (`oraclecloudadmin_ww@oracle.com`) for your user name and a temporary password. Check the email from your Service Administrator for the URL to access the service.

To access the service, you must have the following information:

- The URL of an Oracle Cloud environment
- A user name
- A password

To access an environment:

1. Go to the URL of an Oracle Enterprise Performance Management Cloud environment.
2. Enter your user name and password.
3. Click **Sign In**.

If you have already reset your default password, the Home page is displayed.

If you are accessing the service for the first time, the **Password Management** screen is displayed to help you personalize your password.

- a. In **Old Password**, enter the temporary password that you received in the email from Oracle Cloud Administrator (`oraclecloudadmin_ww@oracle.com`).
- b. In **New Password** and **Re-Type Password**, enter a new password that conforms to the password policy displayed on screen.
- c. In **Register challenge questions for your account**, select challenge questions and their answers. These are used to retrieve the password if you forget it.
- d. Click **Submit**.

Authenticating Using Single Sign-On Credentials

The process of signing in is determined by your organization's SSO configuration. If you are in a setup that uses IWA, upon accessing an Oracle Enterprise Performance

Management Cloud URL, the SSO process may not prompt you to supply a user name and password.

To access an environment using your SSO credentials:

1. Go to the URL of an EPM Cloud environment.
2. Click **Company Sign In**.

 **Note:**

In SSO enabled environments, **Company Sign In** is the only option available to most users. Service Administrators and Account Reconciliation Power Users, whose accounts are configured to run EPM Cloud client components such as EPM Automate, will see an additional option to sign in using Traditional Cloud Account.

If you are in a setup that uses IWA, the landing page of the service is displayed. Otherwise, a login screen is displayed.

3. If a sign in screen is displayed, enter the user name and password that you use to access your organization's network resources, and then click **OK**.

Understanding the Home Page

When you sign in to an environment, the Home page, which contains cards that group the activities that you can perform in the environment, is displayed. Cards provide access to key tasks, tutorials, and related information. On clicking a card, a page containing available shortcuts opens. Availability of shortcuts on a page depends on the role you have in the environment.

In addition to service-specific cards, the following common panels, cards and icons are available on the Home page.


Welcome Panel

The Welcome Panel gives you quick access to key information including messages and the tasks assigned to you. What you see in the Welcome Panel depends on the service.

Academy

Click **Academy** to access a variety of resources for understanding and working with the service. Available resources includes video overviews, tutorials, and information on key tasks.

Navigator

Click  to open a list of shortcuts that mirror the features and functionality that you normally access from the cards available on the Home page.


Settings and Actions Menu

Click your user name at the top-right corner of the screen to display **Settings and Actions**. The options available in this menu depend on your role. Generally, you use


this menu to access online Help, the Provide Feedback utility, Downloads page, and Oracle Support website, and to sign out of the environment.

You can also access Oracle Cloud Customer Connect, a community gathering place for members to interact and collaborate on common goals and objectives, from **Settings and Actions**. You will find the latest release information, upcoming events, and answers to use-case questions on Oracle Cloud Customer Connect.


Accessibility Settings Icon

Click  to specify accessibility settings to enable screen readers and the high contrast setting.

Home Icon

Click  to return to the Home page.

Show/Hide Bar

The Show/Hide bar  is available after you select an option from a card on the Home page. You click it to hide or show the contents of the current card.

Changing Your Password

At your first login, you are prompted to personalize your password and set responses to challenge questions to retrieve the password if you forget it. Subsequently, Oracle Enterprise Performance Management Cloud users will receive an email notification every day, starting seven days prior to password expiry, asking you to change your password. You can reset the password and change your challenge questions and responses from the My Profile page of the My Services application.

Note:

This information is not applicable to users who use the **Company Sign In** option to access an environment.

To change your password:

1. Go to the Oracle Cloud website:

`http://cloud.oracle.com`
2. Click **Sign In**.
3. Under **Cloud Account**, select an account type and data center, for example, `US Commercial 1 (us1)`.
4. Click **My Services**.
5. Enter your identity domain and click **Go**.
6. Enter your Oracle account credentials (user name and password), and click **Sign In**.
7. Click **My Profile**.

8. To change your current password:
 - a. In **Old Password**, enter your current password.
 - b. In **New Password** and **Confirm New Password**, enter a new password that abides by the password policy.
 - c. Click **Submit**.

Turning on Accessibility Mode

Except in Oracle Enterprise Data Management Cloud environments, accessibility mode is not enabled by default. A Service Administrator must enable the use of screen reading software from your environment before other users can use accessibility mode.

See these guides:

- [Accessibility Guide for Planning](#)
- [Accessibility Guide for Financial Consolidation and Close](#)
- [Accessibility Guide for Profitability and Cost Management](#)
- [Accessibility Guide for Account Reconciliation](#)
- [Oracle Cloud Accessibility Guide for Narrative Reporting](#)
- [Accessibility Guide for Tax Reporting](#)

Sample EPM Cloud URLs

You use a unique URL to access each Oracle Enterprise Performance Management Cloud environment. A Service Administrator provides these URLs to users.

Generally, in addition to an application context, the URL of a newly provisioned EPM Cloud instance identifies these components:

- Service name: This is an auto-generated string, which is assigned when you order an EPM Cloud subscription.
To distinguish between your Test and Production environments, Oracle appends `-test` to create a unique service name for the Test environment.
- Identity domain name: This is the name of the identity domain that services your subscription. This name is auto generated.
- EPM Cloud family: This is one of the following:
 - `pbcs` for legacy Planning and Budgeting Cloud , Enterprise Planning and Budgeting Cloud, Oracle Tax Reporting Cloud, and Oracle Financial Consolidation and Close Cloud environments.
 - `epm` for EPM Standard Cloud Service and EPM Enterprise Cloud Service instances. This EPM Cloud family is also used in the URLs of legacy Profitability and Cost Management cloud, Account Reconciliation Cloud, Oracle Enterprise Data Management Cloud, and Enterprise Performance Reporting Cloud instances. This is also used in the URLs of newly provisioned legacy instances of Planning and Budgeting Cloud , Enterprise Planning and Budgeting Cloud, Oracle Tax Reporting Cloud, and Oracle Financial Consolidation and Close Cloud.

- Data center region: This is the region where the data center that hosts the EPM Cloud instance is located. This is not a region name, but a designator for the data center region, for example, us1.

New URL pattern:

Production environment URL pattern: `https://epm-idDomain.epm.dataCenterRegion.oraclecloud.com/epmcloud`

Test environment URL pattern: `https://epm-test-idDomain.epm.dataCenterRegion.oraclecloud.com/epmcloud`

For example, for EPM Cloud environments provisioned with identity domain exampleDoM in exampleDC data center region, the URLs may be as follows:

Production environment: `https://epm-exampleDoM.epm.exampleDC.oraclecloud.com/epmcloud`

Test environment: `https://epm-test-exampleDoM.epm.exampleDC.oraclecloud.com/epmcloud`

New subscriptions, including those newly purchased by existing customers, are configured to use this URL pattern.

What Happens to the Legacy URLs?

You can continue using the old legacy URLs or switch to the new URL, which will automatically redirect to your environments.

If you are an existing user, you may update your URLs with this new application context. For example, if your legacy URL is `https://example-idDomain.pbcs.dom1.oraclecloud.com/HyperionPlanning`, you can update it as follows:

`https://example-idDomain.pbcs.dom1.oraclecloud.com/epmcloud`

It is not mandatory to update your legacy URLs, which can also be used to access your environment.

Sample URLs

Planning

- `https://example-idDomain.pbcs.dom1.oraclecloud.com/HyperionPlanning`
- `https://example-idDomain.pbcs.dom1.oraclecloud.com/workspace/index.jsp`

Planning Modules and Financial Consolidation and Close

`https://example-idDomain.pbcs.dom1.oraclecloud.com/HyperionPlanning`

Tax Reporting

`https://example-idDomain.pbcs.dom1.oraclecloud.com/workspace`

Profitability and Cost Management, Account Reconciliation, Oracle Enterprise Data Management Cloud, and Narrative Reporting

`https://example-idDomain.epm.dom1.oraclecloud.com/epm`

Account Reconciliation

<https://example-idDomain.epm.dom1.oraclecloud.com/arm>

Information Sources

These documents contain information on performing tasks from Oracle Enterprise Performance Management Cloud components:

Table 2-2 Information Sources for EPM Cloud Users

Document Title	Description
<i>Working with Planning</i>	Explains how to perform tasks in Planning.
<i>Working with Planning Modules</i>	Provides information on the tasks you can perform in Planning Modules.
<i>Oracle Smart View for Office User's Guide</i>	Explains how to use Oracle Smart View for Office to interact with EPM Cloud services.
<i>Working with Strategic Modeling in Smart View</i>	Details how to use Smart View to create and manage financial models.
<i>Working with Predictive Planning in Smart View</i>	Provides information on using Predictive Planning, and extension of Smart View, to predict performance based on historical data.
<i>Working with Financial Consolidation and Close</i>	Contains information on performing tasks using Financial Consolidation and Close.
<i>Working with Financial Reporting for Oracle Enterprise Performance Management Cloud</i>	Details how to set up Financial Reporting to create financial reports, and how to view and interact with reports.
<i>Working with Profitability and Cost Management</i>	Explains how to use Profitability and Cost Management to complete tasks such as perform allocations and calculations, and balance rules for application validation.
<i>Reconciling Accounts with Account Reconciliation</i>	Details the procedures to reconcile accounts using the Reconciliation Compliance and Transaction Matching features of Account Reconciliation.
<i>Working with Tax Reporting</i>	Provides information on performing tasks in Tax Reporting to calculate, report on, and approve current and deferred taxes at federal and local levels using financial data, to meet standards such as US GAAP, and IFRS reporting.
<i>Administering and Working with Oracle Enterprise Data Management Cloud</i>	Explains how to use Oracle Enterprise Data Management Cloud to manage all your enterprise data and work with business perspectives.
<i>Creating and Managing Report Packages for Narrative Reporting</i>	Explains the tasks involved in creating and managing report packages that provide a secure, collaborative, and process driven approach for defining, authoring, reviewing and publishing financial and management reports.
<i>Administering and Working with Oracle Strategic Workforce Planning Cloud</i>	Details how to complete tasks using Oracle Strategic Workforce Planning Cloud.
<i>Authoring and Approving Doclets for Narrative Reporting</i>	Provides information on authoring and approving doclets using Narrative Reporting and Smart View.

Table 2-2 (Cont.) Information Sources for EPM Cloud Users

Document Title	Description
<i>Reviewing, Signing, and Receiving Report Packages in Narrative Reporting</i>	Contains information to help you review and sign report packages using Narrative Reporting and Smart View.
<i>Working with Management Reporting for Oracle Enterprise Performance Management Cloud</i>	Explains how to use Management Reporting to create EPM Cloud financial and managerial reports.
<i>Working with Disclosure Management for Narrative Reporting</i>	Helps you work with Disclosure Management to create and edit graphically the Extensible Business Reporting Language (XBRL(c)) tagged submissions to a regulatory agency (for example, a 10K or 10Q submitted to the SEC).
<i>Administering Oracle Sales Planning Cloud</i>	Describes how to create an application and enable and configure Oracle Sales Planning Cloud.
<i>Working with Oracle Sales Planning Cloud</i>	Describes how to work with Sales Planning.

Oracle Cloud Help Center

The Oracle Cloud Help Center is the hub for accessing the latest Oracle Enterprise Performance Management Cloud books, Help topics, and videos.

From the [Cloud Help Center](#), you can get user assistance from a variety of sources such as documentation, videos, and tutorials. Typically, the Cloud Help Center is updated on the first Friday of each month.


Service-Specific Libraries

To access a service-specific library containing the latest documentation for a service, click the name of the service in the **Enterprise Performance Management** section of Oracle Cloud Help Center.

Available User Assistance Assets

User assistance available from a service-specific library, includes the following:

- **Videos:** Click **Videos** to access videos that provide overview information as well as instructions to use application features
- **Books:** Click **Books** in the navigation pane to see the latest English documentation.
- **Translated Books:** Click **Translated Books** in the navigation pane to see available localized online help and documentation.
- **Tutorials:** Click **Tutorials** to get instructions (Learning Paths and Oracle by Example) to learn a topic.

Your Goal	Watch this Video
Learn about available EPM Cloud user assistance assets	 Overview Tour Video

Your Goal

Get answers, learn more, and stay current using the EPM Cloud Help Center

Watch this Video

[Overview Tour Video](#)

Oracle Learning Library

The Oracle Learning Library is dedicated to hosting free instructional content developed by Oracle subject-matter experts.

Use the Search function in [Oracle Learning Library](#) to find tutorials, overview videos and Oracle by Example (OBE) tutorials.

Understanding EPM Cloud Localization

Oracle Enterprise Performance Management Cloud user interface, Online Help, and guides are available in many languages.

User Interface

Generally, EPM Cloud user interface is translated into Arabic, Danish, German, Spanish, Finnish, French, French Canadian, Italian, Japanese, Korean, Dutch, Norwegian, Polish, Portuguese (Brazilian), Russian, Swedish, Turkish, Simplified Chinese, and Traditional Chinese.

Exceptions: Account Reconciliation and Profitability and Cost Management user interfaces are not translated into Arabic and Norwegian.

- Oracle Enterprise Data Management Cloud user interface is translated into these additional languages: Czech, Hebrew, Hungarian, Romanian, and Thai
- Oracle Smart View for Office user interface is translated into these additional languages: Czech, Greek, Hebrew, Hungarian, Portuguese, Romanian, Slovak, and Thai

 **Note:**

To change the language displayed on the user interface and online Help, see the following:

- [Configuring Firefox for a Localized Version of the Service](#)
- [Configuring Google Chrome for a Localized Version of the Service](#)

For information to display a localized version of Smart View, see "Translation Information" in *Oracle Smart View for Office User's Guide*.

Online Help and Documentation

Online Help and guides are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese. *Oracle Smart View for Office User's Guide* is translated into Dutch also.

The translated online help and documentation cover all features up to February 7, 2020, except for the Oracle Enterprise Data Management Cloud translated online Help and guides which cover all features up to October 4, 2019.

To see the latest documentation, use the English documentation on the Books tab.

Sample Applications and Demos

EPM Cloud sample applications, demos, and data are in English only.

Videos

The overview video closed captions are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese.

Tutorial video closed captions are not translated.

3

Working with EPM Cloud Components

Oracle Enterprise Performance Management Cloud client components include Oracle Smart View for Office, EPM Automate, and Financial Reporting.

In This Section:

- [Available Clients and Utilities](#)
- [Prerequisites](#)
 - [Smart View Requirements](#)
 - [Calculation Manager Requirements](#)
- [Downloading and Installing Clients](#)
- [Accessing a Service Using Smart View](#)
 - [Connection Types](#)
 - [URL Syntax for Smart View Connections](#)
 - [Configuring Connections in Smart View](#)
 - [Initiating a Connection](#)
- [Connecting to a Service Using Financial Reporting Web Studio](#)

Available Clients and Utilities

Depending on your role, you can download components, utilities, and templates for the following Oracle Enterprise Performance Management Cloud.

- [Planning and Planning Modules](#)
- [Financial Consolidation and Close and Tax Reporting](#)
- [Profitability and Cost Management](#)
- [Account Reconciliation](#)
- [Oracle Enterprise Data Management Cloud](#)
- [Strategic Workforce Planning](#)
- [Narrative Reporting](#)
- [Sales Planning](#)

Clients and Utilities for Power Users and Users (Users)

This is a list of all clients and utilities available from EPM Cloud subscriptions.

- [EPM Automate](#)

The EPM Automate allows Service Administrators to access environments over a command window to automate business activities such as exporting application and downloading the exported application to desktop. See [About the EPM](#)

Automate Utility in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud* for details.

- Oracle Smart View for Office

Smart View provides a common Microsoft Office interface designed specifically for EPM Cloud.

 **Note:**

You may also use Smart View (Mac and Browser) with the browser-based version of Excel 365 and Excel 365 for Mac. See these information sources:

- A Service Administrator deploys Smart View (Mac and Browser) for all users. See *Deploying and Administering Oracle Smart View for Office (Mac and Browser)* for information on prerequisites and deployment procedures.
- Users connect to EPM Cloud using Smart View (Mac and Browser) to complete tasks. See *Working with Oracle Smart View for Office (Mac and Browser)*.

These service-specific extensions are available:

- Planning Extensions

Planning Extensions include Smart View Admin Extensions and Planning application templates, which facilitate application administration activities, such as dimension management, to be performed from within the Excel interface.

- Smart View Add-On For Administrator

Allows application administration activities, such as dimension management, to be performed from within the Excel interface.

- Smart View Extension for Close and Supplemental Data Management

Enables users to perform close and supplemental data management from within the Excel Interface.

- Smart View Extension for Narrative Reporting

Allows users to perform assigned tasks and analyze model data from within the Microsoft Office suite.

- Smart View Extension for Disclosure Management

Allows users to perform disclosure management activities, including tagging, validation and instance generation from within Microsoft Word.

- Smart View Extension for Disclosure Management Auto Tagging

Provides the ability to perform high volume XBRL for auto tagging as part of Disclosure Management from within Microsoft Excel.

- Financial Reporting Web Studio

Financial Reporting Studio enables book-quality financial reporting that meets the requirements of the Finance department or any functional area that requires highly formatted multidimensional reporting. You access this component by accessing a link in the service.

- **Strategic Modeling**
Strategic Modeling is an add-on to Smart View that enables users to interact with Strategic Modeling.
- **Predictive Planning**
Predictive Planning is an extension to Smart View that works with valid forms to predict performance based on historical data.
- **File Transfer Utility**
This utility allows Service Administrators to access Narrative Reporting environments over a command window to automate business activities
- **Sample Content**
Provides sample report packages, management reports, dimension and data load files, and a sample application.

Planning and Planning Modules

- Smart View
- Planning Extensions
- Predictive Planning
- Financial Reporting Web Studio
- Strategic Modeling (for Planning Modules only)

Financial Consolidation and Close and Tax Reporting

- Smart View
- Smart View Add-On For Administrator
- Smart View Extension for Close and Supplemental Data Management

Profitability and Cost Management

- EPM Automate
- Smart View
- Financial Reporting Web Studio

Account Reconciliation

EPM Automate

Oracle Enterprise Data Management Cloud

EPM Automate

Strategic Workforce Planning

- Smart View
- Planning Extensions
- Predictive Planning

Narrative Reporting

- Smart View
- Smart View Extension for Narrative Reporting
- Smart View Extension for Disclosure Management
- Smart View Extension for Disclosure Management Auto Tagging
- File Transfer Utility
- Sample Content

Sales Planning

- EPM Automate
- Predictive Planning
- Smart View
- Planning extensions
- Strategic Modeling

Prerequisites

Related Topics

- [Smart View Requirements](#)
Excepting Account Reconciliation and Oracle Enterprise Data Management Cloud, all Oracle Enterprise Performance Management Cloud services use Oracle Smart View for Office as a client component.
- [Calculation Manager Requirements](#)
Shockwave Flash (Firefox) is required.

Smart View Requirements

Excepting Account Reconciliation and Oracle Enterprise Data Management Cloud, all Oracle Enterprise Performance Management Cloud services use Oracle Smart View for Office as a client component.

These services must satisfy Microsoft Office requirements in addition to Smart View requirements.

- The newest Smart View release is available from the [Downloads tab on Oracle Technology Network](#).
- .NET Framework 4.5 or higher

For Smart View platform and Microsoft Office requirements, see *Smart View Support Matrix and Compatibility FAQ* (My Oracle Support Doc ID 1923582.1).

 **Note:**

Some services provide extensions and templates, which you download and install after installing Smart View. Extensions and templates applicable to a service are available from [the download location of the service](#).

Calculation Manager Requirements

Shockwave Flash (Firefox) is required.

These services do not use Calculation Manager.

- Profitability and Cost Management
- Tax Reporting
- Account Reconciliation
- Narrative Reporting

Downloading and Installing Clients

You download Oracle Enterprise Performance Management Cloud components and utilities from the **Downloads** page. You can download Oracle Smart View for Office from Oracle Technology Network.

For information on installing the EPM Automate, see "Installing EPM Automate" in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*.

To install EPM Cloud clients:

1. Sign in to an environment. See [Accessing EPM Cloud](#).
2. On the **Home** page, access **Settings and Actions** by clicking your user name at the top right corner of the screen.
3. Click **Downloads**.

The Downloads page opens. This page lists only the components applicable to the service that you are currently accessing.

4. Download the component that you want to install:

For Smart View only:

- a. Click **Download from Oracle Technology Network**.

The Oracle Technology Network download page is displayed.

- b. Click **Download Latest Version**.
- c. Select **Accept License Agreement**, and then click **Download Now**.
- d. If prompted to sign in, enter your Oracle Technology Network credentials and click **Sign In**.
- e. Follow the on-screen instructions and save the Smart View archive to a local folder.
- f. Unzip the Smart View archive to extract `SmartView.exe`.

- g. Close all Microsoft Office applications.

For components other than Smart View:

- a. In the **Downloads** page, click the **Download** button of the component that you want to install.
 - b. Follow the on-screen instructions and save the installer to a local folder.
5. Run the installer (for example, `SmartView.exe`) as an administrator.

 **Note:**

Before starting the installation process:
Before installing Smart View, close all Microsoft Office applications.

Accessing a Service Using Smart View

You can use a shared Connection or a private connection to access or Oracle Smart View for Office.

Related Topics

- [Connection Types](#)
Oracle Smart View for Office supports these connection types. You see the same data irrespective of the connection type you use.
- [URL Syntax for Smart View Connections](#)
Oracle Smart View for Office uses different URL syntax for shared and private connections.
- [Configuring Connections in Smart View](#)
After installing Oracle Smart View for Office, you must set up a connection to an environment.
- [Initiating a Connection](#)
You may need to sign in to initiate an Oracle Smart View for Office connection.

Connection Types

Oracle Smart View for Office supports these connection types. You see the same data irrespective of the connection type you use.

- **Shared connections:** Use public URL of an environment, which is also used to access the environment through a browser, to establish a connection between Smart View and an Oracle Enterprise Performance Management Cloud environment. See [Configuring a Shared Connection](#)
- **Private connections:** Use the an environment-specific URL to establish a connection between Smart View and an EPM Cloud environment. See [Configuring a Private Connection](#).

See "Shared Connections and Private Connections" in *Oracle Smart View for Office User's Guide* for more information on these connection types.

 **Note:**

Account Reconciliation does not use Smart View.

URL Syntax for Smart View Connections

Oracle Smart View for Office uses different URL syntax for shared and private connections.

Use the following information as a guide to the URL syntax you must specify for each service type.

Planning, Planning Modules, Financial Consolidation and Close, and Tax Reporting

Shared connection syntax:

```
https://env-example-idDomain.dom1.oraclecloud.com/workspace/  
SmartViewProviders
```

Private connection syntax:

```
https://env-example-idDomain.dom1.oraclecloud.com/HyperionPlanning/  
SmartView
```

Narrative Reporting

Private connection syntax:

```
https://env-example-idDomain.dom1.oraclecloud.com/epm/SmartView
```

Profitability and Cost Management

Private connection syntax:

```
https://env-example-idDomain.dom1.oraclecloud.com/aps/SmartView
```

Configuring Connections in Smart View

After installing Oracle Smart View for Office, you must set up a connection to an environment.

- [Configuring a Shared Connection](#)
- [Configuring a Private Connection](#)

Configuring a Shared Connection


To configure a shared connection:

1. Start Microsoft Excel.
2. Click **Smart View**, then **Options**, and then **Advanced**.
3. In **Shared Connections URL**, enter the connection URL. See [URL Syntax for Smart View Connections](#) for connection syntax.
4. Click **OK**.

Configuring a Private Connection

See "Using Quick Connection Method" in *Oracle Smart View for Office User's Guide* for an alternate way to create a private connection.

To configure a private connection using the Private Connection Wizard:

1. Start Microsoft Excel.
2. Click **Smart View** and then **Panel**.
3. In Smart View Panel, click the arrow next to  (Switch to), and then select **Private Connections**.
4. Click **Create new connection** at the bottom of the panel.
5. From **Smart View**, select **Smart View HTTP Provider**.
6. In **URL**, enter the connection URL. See [URL Syntax for Smart View Connections](#) for connection syntax.
7. Click **Next**.
8. In **Login**, enter the user name and password for accessing the service, and then click **Sign In**.
9. In **Add Connection - Application/Cube**, navigate to the application and cube to work with, select it, and then click **Next**.
10. In **Add Connection - Name/Description**, enter a name for the connection and an optional description.
11. Click **Finish**.

Initiating a Connection

You may need to sign in to initiate an Oracle Smart View for Office connection.



You can connect to only one service per worksheet.

Watch this tutorial video on navigating in Smart View, including connecting to a data source.



[Tutorial Video](#)

To initiate a connection:

1. Start Microsoft Excel.
2. Click **Smart View**, and then **Panel**.
3. Click the arrow next to  (Switch to), and then do one of the following:
 - Select **Shared Connections**, and then select a shared connection that you previously configured. See [Configuring a Shared Connection](#).
 - Select **Private Connections**, and then, from the drop-down list, select a private connection that you previously configured. See [Configuring a Private Connection](#).
4. Click  (Go to the selected Server or URL).


The **Login** screen is displayed.

5. In **Login**, enter the user name and password for accessing the service, and then click **Sign In**.

Connecting to a Service Using Financial Reporting Web Studio

You access Financial Reporting Web Studio by selecting a link from the service.

To launch Financial Reporting Web Studio:

1. Using a browser, access an environment. See [Accessing EPM Cloud](#).
2. Click  (Navigator), and then select **Reporting Web Studio**.

4

Working in EPM Cloud Environments

You can view readiness information and provide feedback to Oracle from Oracle Enterprise Performance Management Cloud environments.

In This Section

- [Understanding Updates to an Environment and Viewing Readiness Information](#)
- [Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility](#)
 - [Submitting Feedback Using the Provide Feedback Utility](#)
 - [Disabling Feedback Notification](#)

Understanding Updates to an Environment and Viewing Readiness Information

Generally, Oracle releases a patch containing bug fixes, code optimization, and feature updates on the first Friday of the month. Oracle applies this patch to the test environment of the service during the next Daily Maintenance window following a patch release. Typically, production environments are patched on the third Friday of the month.

Monthly Updates to Environments

Oracle notifies Service Administrators of the updates included in each patch. For minor patch releases, Oracle typically provides one week advance notification before patching the test environment. For major updates, Oracle provides a two-month advance notification.

Viewing Readiness Information

A document that provides detailed information about the currently installed service update is posted on the [Oracle Cloud Release Readiness](#) website. Information that may be available at this website includes announcements and new features, changes in behavior, and fixed defects.

Note:

You can open the Oracle Cloud Release Readiness website directly by going to <https://cloud.oracle.com/saas/readiness/overview>.

To access readiness information from the service:

1. Access an environment. See [Accessing EPM Cloud](#).
2. On the Home page, access **Settings and Actions** by clicking your user name at the top right corner of the screen.

3. Select **About** and then **Version**.
4. Click the **Oracle Enterprise Performance Management Release Readiness** link.
Oracle Cloud Release Readiness website is displayed.
5. Click **Enterprise Performance Management**, and then the service type, for example, Planning & Budgeting.

Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility



Use the Provide Feedback utility to help Oracle diagnose and resolve issues efficiently. This utility is available within your Oracle Enterprise Performance Management Cloud environment.

If you encounter an issue while using the service, use the Provide Feedback utility to describe the issue and the steps to reproduce it. To expedite the resolution of issues, Oracle recommends that you add multiple screenshots to your feedback submissions. Adding a succession of screenshots that show your progress through a task enables you to create a storyboard that shows Oracle how to recreate your issue.

Each time a user submits feedback to Oracle using the Provide Feedback utility, a feedback notification, a subset of the information that a user submits, is sent to Service Administrators and to the user who submits the feedback. These notifications enable Service Administrators to review submitted issues and suggest corrective actions. Feedback notification is enabled by default.

Each Service Administrator can turn off the notification by clicking the **Unsubscribe** link embedded in the email. See [Disabling Feedback Notification](#). Regardless of the subscription status, a notification is always sent to the user who submits the feedback.

For services other than Narrative Reporting: You can also provide feedback (text only) to Oracle using the `feedback` EPM Automate command if the user interface becomes unresponsive. See "Command Reference" in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud* for details.

Your Goal	Learn How
Understand the information that you need to submit to quickly resolve issues	 Overview Video
Understand the process of collecting and submitting information using Provide Feedback	 Overview Video




Submitting Feedback Using the Provide Feedback Utility

Before providing feedback, ensure that you are at the stage in the process when the problem was observed.

Note:

Using the Provide Feedback utility to submit diagnostic information sends your submission to Oracle but does not create a service request. If a Service Administrator cannot resolve the issue, then you can create a service request using the information that you submit. While creating the service request, you will be prompted for the reference number, which is displayed on the screen when you submitted diagnostic information using the utility. Additionally, the reference number is included in the feedback notification email. Entering the reference information helps Oracle to easily collect the required diagnostic data.

To provide feedback:

1. While you are in the screen about which you want to provide feedback, open **Setting and Actions** by clicking your user name (displayed at the right top corner of the screen), and then select **Provide Feedback**.
2. In **Give a brief description**, describe the issue that you encountered.
3. **Optional:** Select an option to highlight or darken areas of the screen.
 - Select **Highlight**, and then click and drag on the screen to highlight portions of the screen; for example, to highlight errors or issues.
 - Select **Darken**, and then click and drag on the screen to hide portions of the screen. Use this option to hide sensitive data from the screenshot.
4. Click  (Add button) to capture the screenshot.
5. **Optional:** Add additional screenshots:
 - a. Navigate to the new screen that you want to capture.
 - b. Click  (Add).
 - c. **Optional:** Select an option to highlight or darken areas of the screen, and then click and drag on the screen to highlight or darken an area.
 - d. Describe your issue or the actions that you performed in the current screen.
 - e. Click **Add**.
 - f. Repeat this steps to add more screenshots.
6. Click **Submit**.
7. Review the browser, environment, and plug-in information. Click  (Next) to review screenshots.
8. Click **Submit**.
9. **Optional:** If you need Oracle's assistance to resolve this issue, follow the instructions on the screen to log a service request. While creating the service

request, be sure to enter the reference number that is displayed on the screen. The reference number is included in the feedback notification email also.

10. Click **Close**.

Disabling Feedback Notification

By default, Service Administrators get a feedback notification each time a user submits feedback to Oracle. Each recipient can unsubscribe from the notification mailing list.

Service Administrators use the information included in the notification to review the issue and suggest corrective actions.

If you unsubscribe, feedback notification are disabled for you after the next daily maintenance of the environment. You will, however, continue to receive notification of any feedback that you submit.



Note:

If you disable feedback notification, you cannot enable it again.

To disable feedback notification:

1. Open the feedback notification email (sent by `EPM Cloud User Feedback`), and then click **Unsubscribe**.
2. Sign in to the environment if prompted.
3. Click **Unsubscribe**.
4. Click **Close**.