

Oracle® Fusion Cloud EPM

Getting Started with Oracle Enterprise Performance Management Cloud for Users



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Creating and Running an EPM Center of Excellence

A best practice for EPM is to create a CoE (Center of Excellence).

An **EPM CoE** is a unified effort to ensure adoption and best practices. It drives transformation in business processes related to performance management and the use of technology-enabled solutions.

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

The EPM CoE team:

- Ensures cloud adoption, helping your organization get the most out of your Cloud EPM investment
- Serves as a steering committee for best practices
- Leads EPM-related change management initiatives and drives transformation

All customers can benefit from an EPM CoE, including customers who have already implemented EPM.

How Do I Get Started?

Click to get best practices, guidance, and strategies for your own EPM CoE: [Introduction to EPM Center of Excellence](#).

Learn More

- Watch the Cloud Customer Connect webinar: [Creating and Running a Center of Excellence \(CoE\) for Cloud EPM](#)
- Watch the videos: [Overview: EPM Center of Excellence](#) and [Creating a Center of Excellence](#).
- See the business benefits and value proposition of an EPM CoE in *Creating and Running an EPM Center of Excellence*.



2

About EPM Cloud

In This Section:

- [Overview of EPM Cloud](#)
- [Strategic Workforce Planning](#)
- [Sales Planning](#)
- [EPM Cloud URLs](#)
- [Information Sources](#)

Overview of EPM Cloud

Oracle Enterprise Performance Management Cloud offers the following services:

- [Planning](#)
- [Planning Modules](#)
- [FreeForm](#)
- [Financial Consolidation and Close](#)
- [Tax Reporting](#)
- [Profitability and Cost Management](#)
- [Enterprise 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.

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.

Your Goal	Watch This
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.

Your Goal	Watch This
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.

Your Goal	Watch This
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.

Your Goal	Watch This
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.

Your Goal	Watch This
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.

Your Goal	Watch This
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.

Planning (Planning and Budgeting Cloud)

Planning is a subscription-based planning and budgeting solution built for and deployed on Oracle Fusion Cloud EPM, 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 Fusion Cloud EPM 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 Enterprise Performance Management 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 EPM Cloud, enterprise-wide user profiles can be maintained in one place so that they can be reused across all EPM 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.

Your Goal	Watch This
Learn more about Planning.	 Overview Tour Video

FreeForm

FreeForm is a subscription-based flexible and customizable reporting and planning solution deployed on Oracle Fusion Cloud EPM. It uses the proven, scalable, and best-in-class Oracle SaaS Cloud architecture.

The FreeForm business process helps companies plan their cloud strategy efficiently by avoiding reporting data fragmentation across cloud services or between cloud and on-premises solutions. It delivers instant value and greater productivity for reporting and planning use cases for all lines of business across the company. For more information, refer to Understanding FreeForm in *Administering FreeForm*

Users interact with FreeForm through a web browser or Microsoft Office interface to collaboratively report, analyze, and plan their business needs.

Proven Platform and Technology

The FreeForm functional architecture, which is based on the proven EPM Cloud Platform, provides a unified reporting and planning solution to solve simple to complex use cases across numerous industries. With FreeForm business process, enterprise-wide reporting, close and planning use cases, along with users and their security, can be managed within a centralized place.

Best-in-Class Functionality

With FreeForm business process you can easily create forms, reports, and on-the-fly what-if models with real-time collaborative dashboards. You can also perform ad hoc analysis and create powerful custom reports using annotations, commentary, and document attachments.

Scalable and Flexible

FreeForm leverages the powerful Oracle Essbase OLAP calculation engine and the comprehensive web and Microsoft Office-based Oracle Smart View for Office to enable fast rendering of complex grids with large volumes of data. Inbuilt time and data intelligence 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 Excel and web interfaces.

Enterprise Ready

FreeForm is a one-stop business process to seamlessly plug in a flexible and customizable modeling and reporting solution into larger transaction systems from Oracle and beyond. It supports small-scale to large-scale deployments, data backup and migration. It also provides Enterprise Resource Planning (ERP) data integration capabilities without compromising ease of use or self-service for smaller customers. 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 drill back to any source ERP system.

Essbase Portability

Existing FreeForm customers can leverage built-in migration capabilities to port their on-premises Essbase application to the FreeForm business process to have a SaaS based deployment of these Essbase cubes. This capability enables organizations to pursue a cloud first strategy for reporting and planning.

Unified Deployment

The FreeForm business process lets you report, analyze and plan within a unified construct. Your Oracle Enterprise Performance Management Cloud subscription includes everything that you need from a reporting and planning standpoint using web and Smart View interfaces. You don't need to license, install, upgrade, or patch software; you don't have to buy, install, or configure hardware. FreeForm enables you to leverage the deep product expertise of the worldwide Oracle Hyperion Partner network to develop and deploy cloud-based applications in just weeks.

Strategic Workforce Planning

Strategic Workforce Planning 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. Strategic Workforce Planning is available with EPM Enterprise Cloud Service as an application type in the Planning business process.

Strategic Workforce Planning is extensible using the EPM Cloud Platform framework to further add additional configurations and personalization into your Strategic Workforce Planning application with custom navigation flows, dashboards, and infolets.

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

Sales Planning

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 available with EPM Enterprise Cloud Service as an application type in the Planning business process.

Sales Planning is extensible using the EPM Cloud Platform 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.

Your Goal	Watch This
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.

Your Goal	Watch This
Learn more about Quota Planning.	 Overview: Quota Planning in Sales Planning

About Advanced 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.

About Key Account Planning

Key Account Planning expands Sales Planning to cover a data driven approach to sales baseline planning and impact of trade promotions on sales plans. This results in an overall view of the customer profit and loss including an assessment of promoted and non promoted volume and revenue by customer and product group. Key Account Planning helps key account managers plan trade promotion strategies in order to optimize their trade spends and offers collaborative sales planning. By using baseline planning and promotion planning, key account managers or sales managers can perform gap analysis and see the uplifts - the impact on sales volume or revenue - from running trade promotions.

You'll perform these tasks in Key Account Planning:

- Perform baseline planning. Run predictions on your forecast by key account and product segment, perform what if scenario modeling, and make adjustments.
- Then, in your baseline plan, use building blocks such as different pricing, placements, and product variants to identify the additional non promotional sales plan adjustments.
- Next, add, analyze and adjust trade promotional activities to strategically close the gap between your target and plan, identifying each promotion's incremental uplift volume on

an account, trade spends and profit and loss, including additional contract measures specified for the customer and COGS, to get a full view of customer profit and loss.

- Last, review volume and revenue plans and analyze trade spends and historical promotions to inform your key account planning and other sales planning decisions.

Key functionality includes:

- Baseline Planning including built-in Predictive Planning
- Integration with Quota Planning to bring in targets
- Gap Analysis – Target versus Baseline
- Trade Promotion Planning
 - Promotions planning by dates that drive the volumes and trade spends to corresponding months based on specified uplifts
 - Promotional What-ifs
 - Variable spending. These calculations cover taking the variable cost and applies them to promoted period volumes
 - Promotional planning use cases
 - * Promotion spanning across periods
 - * Promotions for single or multiple products
 - * Multiple promotions for the same product in a period
 - * Multiple promotions for the same product with overlapping dates
 - Adjustments to uplifts by Products
- Trade Spend Summary and ROI on Uplift and Revenue
- Customer Profit and Loss
 - By Customer and Product Group
 - Revenue and Uplift Revenue
 - Trade Spends – Variable and Fixed
 - COGS
 - Contract measures
- Analytics
 - Overview Dashboards with KPIs and visualization
 - Promoted and Non promoted volumes across the customer / product/ territory hierarchy
 - Key Account Summary

Key Account Planning connects sales planning with trade promotions marketing campaigns to increase sales volume or revenue. Key Account Planning:

- Provides forecast accuracy and reliability with data-driven sales plans for customer and product groups including trade promotions.
- Fosters collaboration and accountability.

- Helps you evaluate right promotion strategies by analyzing the effectiveness of your trade promotions.
- Offers what-if scenario planning to evaluate different promotion strategies.
- Eases the pain of managing multiple spreadsheets.
- Offers an extensible framework based on a robust Planning platform and ability to integrate with Sales Cloud.

Your Goal	Watch This
Learn more about Key Account Planning.	 Overview: Key Account Planning in Sales Planning

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

Your Goal	Watch this
Get an overview of Financial Consolidation and Close	 Overview Tour Video
Get started with the consolidation and close process	 Get Started 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.

Your Goal	Watch This
Learn more about Tax Reporting.	 Overview of the Tax Reporting process

Profitability and Cost Management

Businesses must be able to accurately measure, allocate, and manage costs and revenue to maximize profitability. Profitability and Cost Management manages the cost and revenue allocations necessary to compute profitability for business segments, such as products, customers, regions, and branches. It enables you to use cost decomposition, consumption-based costing, and scenario-playing to measure profitability for effective planning and decision support.

The Profitability and Cost Management business process is now available as the following two separate applications:

- [About Profitability and Cost Management](#)

- [Enterprise Profitability and Cost Management](#)

Enterprise Profitability and Cost Management, a more modern implementation of the features available in Profitability and Cost Management, provides seamless integration with other Oracle Enterprise Performance Management Cloud components.

About Profitability and Cost Management

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

Your Goal	Watch This
Learn more about Profitability and Cost Management.	 Overview Tour Video

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

About Enterprise Profitability and Cost Management

Enterprise Profitability and Cost Management, an updated version of Profitability and Cost Management. It provides these features to analysts who have deep domain experience in the computation and reporting methods of management reporting, but may not have much experience with scripting or programming languages.

Building Allocation Models

Enterprise Profitability and Cost Management provides a point and click modeling interface to build complex waterfall processes of allocation custom calculation rules. Complex waterfalls consisting of hundreds of rules organized in a sequentially controlled model can be applied to data across many periods or forecast ranges.

Managing the Calculation Process

Enterprise Profitability and Cost Management provides simple process execution controls to run all or a part of a model and reverse the results of previous runs if necessary. It provides a complete calculation history and supports review of model logic, calculation results, and performance statistics for any given point in time.

Integration with Financial and Planning Systems

The flexible design structures of Enterprise Profitability and Cost Management allow the models to combine dimensions and data from multiple source systems to support reporting that requires merging of data from many financial and operational systems. Enterprise Profitability and Cost Management's design flexibility and integration capabilities allow it to aggregate allocation processes for many financial and reporting systems into a common functional allocation hub.

Transparency of Results

Calculation audit reports for logic changes, performance statistics, and a rule-by-rule tracking of results provide complete transparency. Detailed rule transaction results available in Enterprise Profitability and Cost Management allow tracing the source of any allocated value.

Your Goal	Watch This
Get an overview of Enterprise Profitability and Cost Management.	 Overview Tour Video
Get started with Enterprise Profitability and Cost Management	 Feature Overview Tour
Learn about Enterprise Profitability and Cost Management models and modeling	 Overview Video

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.

Your Goal	Watch This
Learn more about 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.

This powerful module helps companies save additional time on performing reconciliations while improving quality and reducing risk.

Enterprise Data Management

Enterprise Data Management 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:

Enterprise Data Management is available as Oracle Enterprise Data Management Cloud, a standalone cloud service, or as a business process within Oracle Enterprise Performance Management Cloud. Oracle Enterprise Data Management Cloud is purchased separately from your EPM Cloud subscription. See [Overview of Oracle Enterprise Data Management Cloud](#).

Enterprise Data Management business process is available for the following EPM Enterprise Cloud Service subscriptions:

- Hosted Employee Metric (Unlimited records)
- Hosted Named User Metric (Maximum 5,000 records)

The record count represents a count of unique nodes across all applications grouped by business domains. A business domain corresponds to any subject area that the enterprise deems fit to share as a logical grouping of real world entities across business applications. This type offers sufficient records to most enterprises to perform a capability preview of the standalone Oracle Enterprise Data Management Cloud subscriptions.

Your Goal

Get an overview of Enterprise Data Management
Understand the user interface of Enterprise Data Management

Watch this Video



[Overview Tour Video](#)



[Overview: User Interface Tour Video](#)

Features in Enterprise Data Management and Oracle Enterprise Data 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 Oracle Enterprise Performance Management 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 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.

Overview of Oracle Enterprise Data Management Cloud

Oracle Enterprise Data Management Cloud helps manage and govern changes to master, reference, and metadata across the enterprise. Users access enterprise data through portals called viewpoints, govern changes across them via requests, synchronize alternate business perspectives via subscriptions, and map data sets through parent-child relationships and complex multi-dimensional combinations.

You use Oracle Enterprise Data Management Cloud to build an authoritative system of reference that orchestrates structural changes to accelerate business transformations, de-risk mergers and acquisitions, stimulate trustworthy business analytics, promote compliance to standards, and build alignment between how a business runs its operations, measures performance, and plans for the future.

Oracle Enterprise Data Management Cloud is a standalone service. It is different from the Enterprise Data Management business process in EPM Enterprise Cloud Service, but offers similar features with no restrictions on hosted employee and hosted record metrics. For a detailed overview, see [Features in Enterprise Data Management and Oracle Enterprise Data Management Cloud](#).

Your Goal

Get an overview of Oracle Enterprise Data Management Cloud

Watch this Video



[Overview Tour Video](#)

Your Goal

Understand the user interface of Oracle Enterprise Data Management Cloud

Watch this Video



[Overview: User Interface Tour Video](#)

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.

Your Goal	Watch This
Learn more about Narrative Reporting.	Overview Tour Video

EPM Cloud URLs

New Oracle Enterprise Performance Management Cloud subscriptions are supported on Oracle Cloud Infrastructure, which uses Oracle Identity Cloud Services as its default identity store.

Oracle Cloud Infrastructure: EPM Cloud is a component of Oracle Fusion Cloud EPM.

The newest version of Oracle Fusion Cloud EPM is known as Oracle Cloud Infrastructure (OCI). OCI delivers highly available computing power and infrastructure to EPM Cloud. New EPM Cloud subscriptions purchased by first-time customers are supported on OCI. OCI may also be referred to as Oracle Fusion Cloud EPM Gen 2 or OCI (Gen 2).

Oracle Cloud Classic: Oracle Cloud Classic is the predecessor to OCI. Many EPM Cloud customers are supported on Oracle Cloud Classic.

You use a unique URL to access each EPM Cloud environment. A Service Administrator provides these URLs to users.

- [Classic EPM Cloud URLs](#)
- [OCI EPM Cloud URLs](#)

Classic EPM Cloud URLs

Generally, in addition to an application context, the URL of a newly provisioned Oracle Enterprise Performance Management Cloud environment 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`

OCI EPM Cloud URLs

OCI environments use the following URL pattern:

`https://CLOUD_INSTANCE_NAME-CLOUD_ACCOUNT_NAME.SERVICE.DATA_CENTER_REGION.DOMAIN/CONTEXT`

The components that make up the URL are:

- **Cloud Instance Name:** The instance name, for example, `acme`. To distinguish between test and production environments, Oracle appends `-test` to create a unique instance name for the test environment.
- **Cloud Account Name:** This is the name, for example, `epmidm` used while creating the Oracle Fusion Cloud EPM Account. This was previously known as the Identity Domain Name.
- **Oracle Fusion Cloud EPM Service:** This is set to `epm`.
- **Data Center Region:** This is the region where the data center that hosts Oracle Enterprise Performance Management Cloud is located, for example, `us-phoenix-1..`
- **Oracle Fusion Cloud EPM Domain:** The domain, for example, `ocs.oraclecloud.com`, that hosts Oracle Fusion Cloud EPM.
- **Application Context:** This is set to `epmcloud`

Using the sample settings from the preceding explanation, the URLs may be as follows:

Production environment: `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/epmcloud`

Test environment: <https://acme-test-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/epmcloud>

Information Sources

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

Table 2-1 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>Working with FreeForm</i>	Explains how to perform tasks in FreeForm applications.
<i>Working with Sales Planning</i>	Describes how to work with Sales Planning.
<i>Administering and Working with Strategic Workforce Planning</i>	Details how to configure and administer Strategic Workforce Planning and complete tasks.
<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 Strategic Workforce Planning</i>	Details how to complete tasks using Strategic Workforce Planning.

Table 2-1 (Cont.) Information Sources for EPM Cloud Users

Document Title	Description
<i>Authoring and Approving Doclets for Narrative Reporting</i>	Provides information on authoring and approving doclets using Narrative Reporting and Smart View.
<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 Reports 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).

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

- Profitability and Cost Management user interfaces are not translated into Arabic and Norwegian.
- Account Reconciliation and 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.
- Oracle Digital Assistant for Enterprise Performance Management user interface is available in English only.



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 Guides

Online Help and guides are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese. Smart View documentation is translated into Dutch also.

The translated online Help and guides cover all features up to September 1, 2023, except for *Oracle Smart View for Office User's Guide*, which covers all features up to May 5, 2023.

The English online Help and guides contain up to date information on all features.

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

Setting up and Accessing EPM Cloud

In This Section:

- [Setting Up Browsers for EPM Cloud](#)
- [Accessing EPM Cloud](#)
- [The Home Page](#)
- [Changing Your Password](#)
- [Join Oracle Cloud Customer Connect](#)
- [Turning on Accessibility Mode](#)

Setting Up Browsers for EPM Cloud

- [Supported Browsers](#)
 - [Configuring Google Chrome for a Localized Version of the Service](#)
 - [Configuring Microsoft Edge](#)
 - [Configuring Firefox](#)
 - [Configuring Firefox for a Localized Version of the Service](#)
- [Minimum Screen Resolution](#)

Supported Browsers

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

To comply with Oracle Support policies, you must use a supported browser while accessing EPM Cloud. See [Oracle Software Web Browser Support Policy](#).

Table 3-1 Supported Browsers for Each Client Platform

Client Platforms	Recommended Browser	Other Supported Browsers
Microsoft Windows	Google Chrome	Firefox ESR Microsoft Edge Version 80 or newer
Apple Mac OS X	Google Chrome	Safari, Firefox ESR
Linux (all versions)	Google Chrome	Firefox ESR
iOS *	Safari	None
Android *	Google Chrome	None

* Only browser-based interaction is supported for iPads and Android mobile devices. Browser-based interaction is not supported on phones.

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`

Using Multiple Browser Tabs or Browser Instances

EPM Cloud business processes require you to maintain a unique browser session per user. Additionally, EPM Cloud supports only one instance of dashboards in a browser session.

Business processes may not refresh correctly if you have multiple sessions open at the same time on the same machine; for example, one Chrome window with two tabs or multiple instances of the same browser (two Chrome Windows). Multiple simultaneous operations using the same user ID from the same computer or different computers can also result in unpredictable behavior.

A **Duplicate Tab** command is available in Firefox, Chrome, and Edge 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**.

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 Fusion Cloud EPM or Single Sign-On credentials.

- Oracle Enterprise Performance Management Cloud credentials. See [Authenticating Using EPM Cloud Credentials](#).
- Network credentials if your organization configured Single Sign-On (SSO) access. See [Authenticating Using Single Sign-On Credentials](#).

Authenticating Using EPM Cloud Credentials

The first time you log in, check the email from Oracle Fusion Cloud EPM 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 Fusion Cloud EPM 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 Fusion Cloud EPM 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**.

Using Vanity URLs

Vanity URLs can help you easily remember complex URLs of Oracle Enterprise Performance Management Cloud environments. These are custom URLs that you can use to access EPM Cloud environments from a web browser, Oracle Smart View for Office (20.200 and higher), and EPM Automate. To create a new vanity URL, you can either use third party links (e.g. T.ly, Bitly, Rebrandly or TinyUrl) or an open source solution (e.g. YOURLS). If using an API gateway or reverse proxy, use its URL and the context defined for your environment in place of the EPM Cloud URL.

Learn to create a Vanity URL and facilitate a connection with EPM Cloud using:

- [Web Browser](#)
- [Smart View](#)

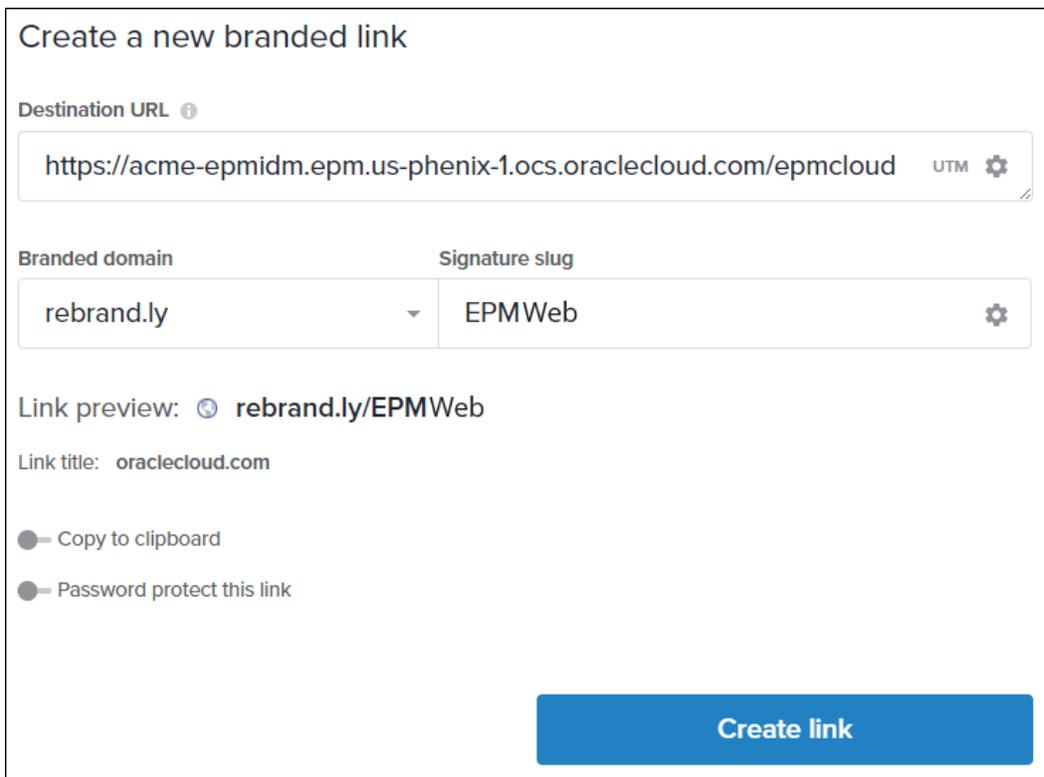
Note:

Vanity URLs do not work for cross-environment connections (EPM Connect), and EPM Agent.

Creating a Vanity URL and Connecting Using Web Browser

This example demonstrates how to use [Rebrandly](#) to create a Vanity URL, facilitating a connection to EPM Cloud from a web browser.

1. Enter the complete EPM Cloud URL in **Destination URL** that you need to simplify with a Vanity URL. Include context `/epmcloud`.
2. Enter a custom URL in **Signature slug**.
Rebrandly generates a Link preview, showcasing the newly created Vanity URL.
3. Click **Create link** to create this Vanity URL.



The screenshot shows the 'Create a new branded link' interface. At the top, the title is 'Create a new branded link'. Below it, there is a 'Destination URL' field with an information icon, containing the URL 'https://acme-epmidm.epm.us-phenix-1.ocs.oraclecloud.com/epmcloud' and a 'UTM' settings icon. Below this are two dropdown menus: 'Branded domain' set to 'rebrand.ly' and 'Signature slug' set to 'EPMWeb', both with settings icons. A 'Link preview' section shows a globe icon followed by 'rebrand.ly/EPMWeb'. Below that, the 'Link title' is 'oraclecloud.com'. There are two radio buttons: 'Copy to clipboard' (selected) and 'Password protect this link'. A large blue 'Create link' button is at the bottom right.

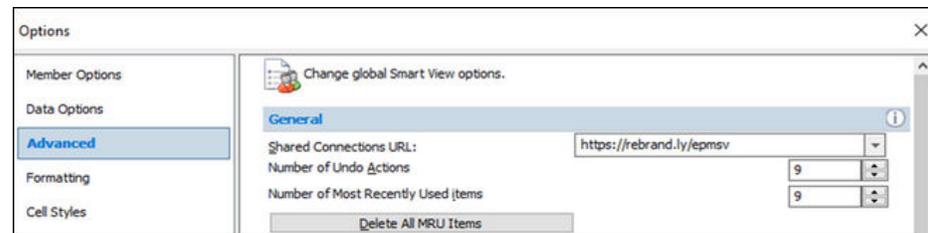
4. Enter the Vanity URL (e.g. `https://rebrand.ly/EPMWeb`) in the web browser to be redirected to the EPM Cloud URL.

Creating Vanity URLs and Connecting Using Smart View

Using [Rebrandly](#), this example demonstrates how to facilitate a connection using Vanity URL in Smart View. There are two types of connections in Smart View - Shared and Private. The EPM Cloud URL for both connections follows a specific syntax required for these connections. See [URL Syntax for Smart View Connections](#). You need to create one Vanity URL for Shared connection and another one for Private connection.

Creating a Vanity URL for Shared Connection in Smart View

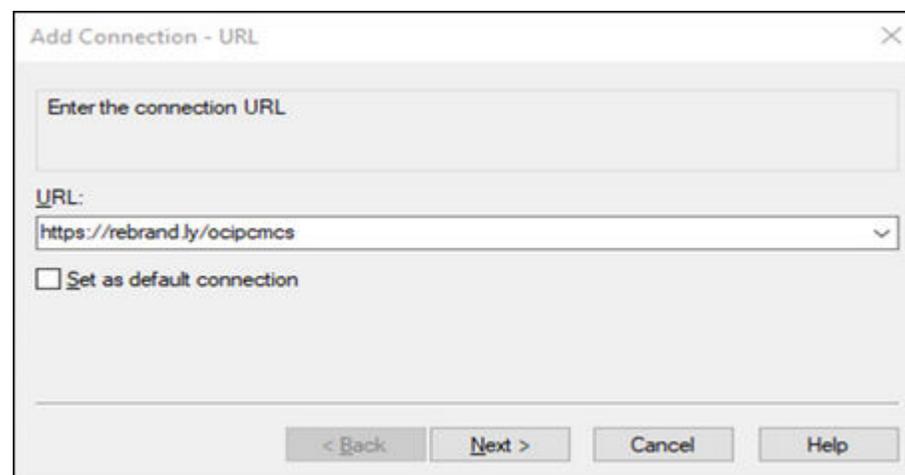
1. Enter the **Destination URL** `https://acme-epmidm.epm.us-phenix-1.ocs.oraclecloud.com/workspace/SmartViewProviders`.
2. Enter **Signature slug** `epmsv` to create a new Vanity URL `https://rebrand.ly/epmsv`.
3. To facilitate a shared connection in Smart View, follow the steps in [Configuring a Shared Connection](#). For this example-
 - a. In **Advanced** settings, add the Vanity URL in **Shared Connection URL**.



- b. Click on Shared Connection logon to access the EPM Cloud instance using Smart View.

Creating a Vanity URL for Private Connection in Smart View

1. Enter the **Destination URL** `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/HyperionPlanning/SmartView`.
2. Enter **Signature slug** `ocipcmcs` to create a new Vanity URL `https://rebrand.ly/ocipcmcs`.
3. Follow the steps in [Configuring a Private Connection](#).
 - a. In **Private Connection Wizard**, follow the steps and add the Vanity URL in this step:



- b. Complete the rest of the steps. Click on Private Connection logon to access the EPM Cloud instance using Smart View.

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**. See [Join 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, you can reset the password and change your challenge questions and responses from the My Profile page of the My Services application.

For Classic environments, users must change passwords periodically. See [Manage your Traditional Cloud Account Password](#) in *Getting Started with Oracle Cloud Applications*.

OCI (Gen 2) environments can be configured to set password policy to match your corporate standard. In *Administering Oracle Identity Cloud Service*, see:

- [Manage Oracle Identity Cloud Service Password Policies](#)
- [Changing Your Password](#)

In environments configured for Single Sign-on with an identity provider, the password policy for signing into an environment using the **Company Sign In** option is defined in the identity provider.

To change your password:

1. In a browser, enter the URL of the Oracle Enterprise Performance Management Cloud environment for which you want to change your password. Changing password affects your password in test and production environments.
2. Click **Can't access your account?** to open the **Forgot Password** screen.
3. In **User Name**, enter your user ID, for example, `john.doe@example.com`.
4. In **Identity Domain**, enter the identity domain of the environment.
5. Click **Next**.
6. Answer the challenge questions and click **Next**.
7. In **Enter new password** and **Re-enter new password**, type in a new password.
8. Click **Save**.

Join Oracle Cloud Customer Connect

Customer Connect is a community gathering place for members to interact and collaborate on common goals and objectives. It's where you will find the latest release information, discussion forums, upcoming events, and answers to use-case questions. Joining takes just a few minutes. Join now and sign up for notifications!

To Join Customer Connect:

1. Go to <https://community.oracle.com/customerconnect/> and select **Register** in the upper right.
2. After you have joined and logged in, access the forums (categories), from the Cloud Customer Connect home page. Select **Categories**, then **Enterprise Resource Planning**, and then make your selection under **Enterprise Performance Management**.

To ensure you are always in the know, confirm you have your notification preferences set for [EPM Announcements](#) as well as each category you're following.

1. To set notification preferences for EPM Announcements, go to **Categories**, then **Announcements**, and then **Enterprise Performance Management**.
2. Select **Notification preferences** and set preferences.
3. To set notification preferences for each category, navigate to the Category page and select the **Notification preferences** drop down. You must go to each Category page separately and select the **Notification preferences** drop down to set preferences.

Note:

The **Settings and Actions** menu contains a link to Cloud Customer Connect. To open Cloud Customer Connect, from the Home page, click the down arrow next to the user name, and then select **Cloud Customer Connect**.

Turning on Accessibility Mode

Oracle Enterprise Data Management Cloud is fully accessible by default and does not require you to enable Accessibility Mode. For all other business processes, users can enable Accessibility mode.

For more information, see *Enabling Accessibility in Oracle Enterprise Performance Management Cloud Accessibility Guide*.

4

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](#)
- [Services using Smart View and Calculation Manager](#)
- [Downloading and Installing Clients](#)
- [Accessing a Service Using Smart View](#)
- [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.

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

Clients and Utilities for Power Users and Users

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

- 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 - 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 - Includes 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 Transactions - Allows users to manage reconciliation compliance transactions from the Excel interface.
- Smart View Extension for Supplemental Data Management - Enables users to perform supplemental data management from within the Excel interface.
- Smart View Extension for Task Manager - Enables users to update their tasks 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.
- Financial Reporting Web 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 - This is an add-on to Smart View that enables users to interact with Strategic Modeling.
- Predictive Planning - This is an extension to Smart View that works with valid forms to predict performance based on historical data.
- Sample Content - Provides sample report packages, management reports, dimension and data load files, and a sample application.

Planning, Planning Modules, and FreeForm

- EPM Automate
- Smart View
- Planning Extensions
- Predictive Planning

- Financial Reporting Web Studio
- Strategic Modeling (for Planning Modules only)

Account Reconciliation

- EPM Automate
- Smart View
- Smart View Extension for Transactions

Enterprise Profitability and Cost Management

- Smart View
- Planning extensions
- EPM Automate

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

Narrative Reporting

- Sample Content
- EPM Automate
- Smart View
- Smart View Extension for Narrative Reporting

Oracle Enterprise Data Management Cloud

EPM Automate

Sales Planning

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

Strategic Workforce Planning

- Smart View

- Planning Extensions
- Predictive Planning

Smart View Prerequisites

The Oracle Enterprise Performance Management Cloud services must satisfy Microsoft Office requirements in addition to Oracle Smart View for Office requirements.

- The newest Smart View release is available from the [Downloads tab on Oracle Technology Network](#). You must install the current version of Smart View to utilize the latest features.

The current Smart View release and one prior release are supported for an EPM Cloud update. For example, Smart View version 23.200 and 23.100 are supported for EPM Cloud 23.11 update.

- .NET Framework 4.8 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 **Downloads** page of the service.

Services using Smart View and Calculation Manager

Smart View

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

All EPM Cloud services except these use Calculation Manager:

- Profitability and Cost Management
- Enterprise 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 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 installing Smart View or any Smart View extension, close all Microsoft Office applications.

Some Smart View extensions use the `SVEXT` extension. Double-click the downloaded file and follow the onscreen prompts to install it.

Accessing a Service Using Smart View

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

In this section:

- [Connection Types](#)
- [URL Syntax for Smart View Connections](#)
- [Configuring Connections in Smart View](#)
- [Initiating a Smart View 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.

URL Syntax for Smart View Connections

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

- [Classic Environments](#)
- [OCI Environments](#)

Classic Environments

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

Planning, Planning Modules, Enterprise Profitability and Cost Management, 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`

OCI Environments

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, Enterprise Profitability and Cost Management, and Tax Reporting

Shared connection syntax:

`https://CLOUD_INSTANCE_NAME-CLOUD_ACCOUNT_NAME.SERVICE.DATA_CENTER_REGION.DOMAIN/workspace/SmartViewProviders.`

For example, `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/workspace/SmartViewProviders`

Private connection syntax:

`https://CLOUD_INSTANCE_NAME-CLOUD_ACCOUNT_NAME.SERVICE.DATA_CENTER_REGION.DOMAIN/HyperionPlanning/SmartView.`

For example, `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/HyperionPlanning/SmartView`

Narrative Reporting

Private connection syntax:

`https://CLOUD_INSTANCE_NAME-CLOUD_ACCOUNT_NAME.SERVICE.DATA_CENTER_REGION.DOMAIN/epm/SmartView.`

For example, `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/epm/SmartView`

Profitability and Cost Management

Private connection syntax:

`https://CLOUD_INSTANCE_NAME-CLOUD_ACCOUNT_NAME.SERVICE.DATA_CENTER_REGION.DOMAIN/aps/SmartView.`

For example, `https://acme-epmidm.epm.us-phoenix-1.ocs.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](#)

Troubleshooting

See *Fixing Smart View Issues in Oracle Enterprise Performance Management Cloud Operations Guide*.

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 Smart View 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**.
Choose from:
 - a. Select **Shared Connections**, and then select a shared connection that you previously configured. See [Configuring a Shared Connection](#).
 - b. Select **Private Connections**, and then, from the drop-down list, select a private connection that you previously configured. See [Configuring a Private Connection](#).
3. Click → (Go to the selected Server or URL).
The **Login** screen is displayed.
4. In **Login**, enter the user name and password for accessing the service, and then click **Sign In**.

Troubleshooting

See *Fixing Smart View Issues in Oracle Enterprise Performance Management Cloud Operations Guide*.

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**.

5

Learn About New Features and Updates

In This Section

- [Using the EPM Cloud Features Tool to View the Features Released Each Month](#)
- [Understanding Updates to an Environment and Viewing Readiness Information](#)

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.

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:

To access readiness information from the service:

1. Access an environment.
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.

Troubleshooting

Dealing with Down Environments in *Oracle Enterprise Performance Management Cloud Operations Guide*.

6

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.

You can also provide feedback (text only) to Oracle using the feedback EPM Automate command if the user interface becomes unresponsive.

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**.