Oracle® Fusion Cloud EPM

Getting Started Guide 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 Oracle Fusion 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*.

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Overview

Scope of this Guide

The information contained in this guide applies to both Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management (Cloud EPM and Cloud EDM).

In This Section:

- About Cloud EPM
- About Cloud EDM
- Understanding Feature Updates
- Information Sources

About Cloud EPM

Oracle Fusion Cloud Enterprise Performance Management offers the following services:

- Account Reconciliation
- Enterprise Data Management
- Financial Consolidation and Close
- FreeForm
- Narrative Reporting
- Planning
- Planning Modules
- Profitability and Cost Management
- Sales Planning
- Strategic Workforce Planning
- Tax Reporting

Account Reconciliation

Reconciliations ensure that a company's financial accounts are validated by checking to see if the balance in the account is correct. Account Reconciliation 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 business process that enables you to manage business process specific data viewpoints.

Enterprise Data Management supports the following capabilities:

- Govern changes across business process data viewpoints
- Share and map data sets across systems
- Support and accelerate cloud deployments
- Maintain an authoritative system of reference for enterprise data

Availability and Purchase Options

Enterprise Data Management is available in the following forms:

Enterprise Data Management business process
The Enterprise Data Management business process is included with an **EPM Enterprise subscription**. This option provides **limited number of records** and is intended for capability preview.

The Enterprise Data Management business process is available with the following EPM Enterprise subscription metrics:

- Hosted Employee Metric (unlimited records)
- Hosted Named User Metric (maximum 5,000 records)

Record counts represent unique nodes across all business processes. Nodes are grouped into business domains, which are logical groupings of real-world entities.

Oracle Fusion Cloud Enterprise Data Management standalone subscription

Cloud EDM is available as a **separate cloud service subscription**.
The standalone Cloud EDM subscription provides:

- Full Enterprise Data Management functionality
- No limits on hosted employee metrics
- No limits on record metrics

Use the standalone Cloud EDM subscription for production-scale Enterprise Data Management deployments. See About Cloud EDM. For a detailed feature overview, see Features in Enterprise Data Management Business Process and Cloud EDM.

Enterprise Data Management Videos

Use the following videos to learn more about Enterprise Data Management:

Your Goal	Watch this Video
Get an overview of Enterprise Data Management	Overview Tour Video
Understand the user interface of Enterprise Data Management	Overview: User Interface Tour Video

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
- Enterprise Journals

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

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 Cloud EPM 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 Fusion Cloud Enterprise Performance Management 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.

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

Planning

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 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 Fusion Cloud Enterprise Performance Management 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 Cloud EPM, enterprise-wide user profiles can be maintained in one place so that they can be reused across all Cloud EPM 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 business process 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 Information technology resource and budgets.

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

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.

Profitability and Cost Management

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

Profitability and Cost Management is offered as two distinct business processes:

- Profitability and Cost Management. See About Profitability and Cost Management
- Enterprise Profitability and Cost Management - A modern implementation of the Profitability and Cost Management capabilities that provides seamless integration with other Cloud EPM components. See About Enterprise Profitability and Cost Management

About Profitability and Cost Management

The Profitability and Cost Management business process models are designed for analysts with deep domain expertise in management reporting and profitability analysis, but who may have limited experience with scripting or programming languages.

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

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

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

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 as an application type in the Planning business process.

Sales Planning is extensible using the Cloud EPM 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 Fusion Cloud Enterprise Performance Management, 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

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 as an application type in the Planning business process.

Strategic Workforce Planning is extensible using the Cloud EPM 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

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

About Cloud EDM

Oracle Fusion Cloud Enterprise Data Management is a **standalone Oracle Cloud service** that helps you manage and govern changes to master data, reference data, and metadata across the enterprise.

Cloud EDM enables administratrors to:

- Access enterprise data through configurable viewpoints
- Govern data changes using request-based workflows
- Synchronize alternate business perspectives using subscriptions
- Map data sets using parent-child relationships and multi-dimensional structures

You use Cloud EDM to build an **authoritative system of reference** that coordinates structural data changes across the organization. This supports business transformation initiatives, reduces risk during mergers and acquisitions, enables consistent analytics, promotes compliance with enterprise standards, and aligns operational execution with performance measurement and planning.

Subscription and Usage

Cloud EDM is available as a **standalone cloud service subscription** with:

- No restrictions on hosted employee metrics
- No restrictions on named user metrics
- No restrictions on record counts

By comparison, the Enterprise Data Management business process included with the EPM Enterprise subscription is limited to a maximum of **5,000 records**. For a detailed feature overview, see Features in Enterprise Data Management Business Process and Cloud EDM.

Cloud EDM Cloud Videos

Use the following videos to learn more about Cloud EDM.

Your Goal	Watch this Video
Get an overview of Cloud EDM	Overview Tour Video
Understand the user interface of Cloud EDM	Overview: User Interface Tour Video

Features in Enterprise Data Management Business Process and Cloud EDM

Work with Business Processes

Business Process creators register each connected business to generate end user experiences called a default view. Upon registration, creators can assign others as business process owners or data managers. Each view contains one or more viewpoints that are optimized to maintain each registered business process dimension as a list or a hierarchy. To collaborate, business process 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 business processes, 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 business processes.
- Use approvals with subscription requests to simulate business process dimension-level enrichment and approval stages across multiple business process 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 processes or subject areas. Views are defaulted based upon business process 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 business processes. Configure mapping keys and locations for each target dimension to export data maps.

Business Process Integration

Accelerate integration with Oracle Fusion Cloud Enterprise Performance Management business processes, for example, Planning, Financial Consolidation and Close, E-Business Suite General Ledger and Oracle Financials Cloud General Ledger, using predefined business process registration. Leverage a custom business process registration using an open interface to integrate with all other business processes. Use a wizard-driven configuration experience to onboard business processes: establish reusable connections, configure import and export operations, and construct ready-to-use, business process-specific views for immediate business process maintenance purposes.

Automate Tasks

Automate tasks interactively or via a scheduled process using EPM Automate. For example, migrate across service environments, 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 business processes. 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.

Understanding Feature Updates

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

Monthly Updates to Environments

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

Viewing Readiness Information

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

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

To access readiness information from the service:

1. Access an environment. See Accessing Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management.
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*.

Information Sources

These documents provide information on how to perform tasks related to the Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management components:

Table 2-1 Information Sources for Users

Document Title	Description
Working with Planning	Explains how to perform tasks in Planning.
Working with Planning Modules	Provides information on the tasks you can perform in Planning Modules.
Working with FreeForm	Explains how to perform tasks in FreeForm applications.
Working with Sales Planning	Describes how to work with Sales Planning.
Administering and Working with Strategic Workforce Planning	Details how to configure and administer Strategic Workforce Planning and complete tasks.
Oracle Smart View for Office User's Guide	Explains how to use Oracle Smart View for Office to interact with Cloud EPM services.
Working with Strategic Modeling in Smart View	Details how to use Smart View to create and manage financial models.
Working with Predictive Planning in Smart View	Provides information on using Predictive Planning, and extension of Smart View, to predict performance based on historical data.
Working with Financial Consolidation and Close	Contains information on performing tasks using Financial Consolidation and Close.
Working with Financial Reporting	Details how to set up Financial Reporting to create financial reports, and how to view and interact with reports.

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

Document Title	Description
Working with Profitability and Cost Management	Explains how to use Profitability and Cost Management to complete tasks such as perform allocations and calculations, and balance rules for application validation.
Reconciling Accounts with Account Reconciliation	Details the procedures to reconcile accounts using the Reconciliation Compliance and Transaction Matching features of Account Reconciliation.
Working with Tax Reporting	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.
Administering and Working with Oracle Fusion Cloud Enterprise Data Management	Explains how to use Cloud EDM to manage all your enterprise data and work with business perspectives.
Creating and Managing Report Packages for Narrative Reporting	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.
Administering and Working with Strategic Workforce Planning	Details how to complete tasks using Strategic Workforce Planning.
Authoring and Approving Doclets for Narrative Reporting	Provides information on authoring and approving doclets using Narrative Reporting and Smart View.
Reviewing, Signing, and Receiving Report Packages in Narrative Reporting	Contains information to help you review and sign report packages using Narrative Reporting and Smart View.
Working with Reports	Explains how to use Management Reporting to create Cloud EPM financial and managerial reports.
Getting Started with Oracle Smart View for Google Workspace	Describes how to install and get started with Smart View for Google Workspace.
Working with Oracle Smart View for Google Workspace	Explains how to use Smart View for Google Workspace to interact with Cloud EPM services.
Working with Oracle Smart View for Office (Mac and Browser)	Explains how to use Smart View for Mac and Browser to interact with Cloud EPM services.
Working with Reports	Explains how to use Reports to create Cloud EPM financial and managerial reports.
Designing with Reports	Explains concepts and tasks designers need to understand to use Reports for Narrative Reporting and Cloud EPM Platform.

Oracle Cloud Help Center

Centralized documentation and learning resources for Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management administrators and users.

From the Help Center, you can get user assistance through various resources, including documentation, videos, and tutorials. The Help Center is typically updated on the first Friday of each month. Key areas to explore include:

- Enterprise Performance Management

- Enterprise Data Management

The Help Center features the following options in the navigation pane:

- **How Do I:** Find step-by-step instructions for typical tasks.
- **FAQs:** Find answers to your environment-specific questions.
- **Books**: Access the latest English documentation.
- **Translated Books**: Explore available translated online help and documentation.
- **Videos**: View videos that offer overview and instructions on using business process features.
- **Tutorials**: Discover instructional content to help you learn various topics.

Your Goal	Watch this Video
Learn about available user assistance assets	Overview Tour Video
Get answers, learn more, and stay current using the 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 Translation

The user interface, Online Help, and guides are available in many languages.

User Interface

Generally, the 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 Fusion Cloud Enterprise Data Management 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 Translated Version of the Service
> - Configuring Google Chrome for a Translated Version of the Service
>
> For information to display a translated 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 documentation cover all features up to Oct 1, 2025.

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

Sample Applications and Demos

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 Cloud EPM and Cloud EDM

In This Section:

Setting Up Browsers

Overview of browser setup for Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management access.

In This Section:

Supported Browsers

Lists the supported and recommended browsers for each client platform.

To comply with Oracle Support policies, you must use a supported browser while accessing the Oracle Fusion Cloud Enterprise Performance Management or Oracle Fusion Cloud Enterprise Data Management environment. 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

The applications require each user to maintain a separate browser session. Additionally, the Cloud EPM or Cloud EDM environment support only one instance of dashboards per browser session.

Applications may not refresh correctly if you have multiple sessions open at the same time on the same machine. For example, this can occur if you have one Chrome window with two tabs or multiple instances of the same browser(say two Chrome windows). Running multiple simultaneous operations using the same user ID from either the same computer or different computers may also result to unpredictable behavior.

A **Duplicate Tab** command is available in Firefox, Chrome, and Edge browsers to spawn another instance of the current tab. However, Oracle does not recommend using this command to duplicate the current view of an application, as it may result in the display of errors within the application.

Configuring Google Chrome for a Translated Version of the Service

Steps to change Chrome language settings for Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management

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 Translation.

To reconfigure Chrome for a new locale:

1. In Google Chrome, access Settings by navigating to `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 can update the language settings in Microsoft Edge to access Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management environments in a language other than the default language set in the browser.

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 accessing the URL `edge://settings/content/javascript`
- If pop-ups are blocked, make sure to add `*.oraclecloud.com` as an allowed site. You can view the current pop-up setting by accessing 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 accessing the URL `edge://settings/content/cookies`

Configuring Microsoft Edge for a Translated Version of the Service

For a list of languages in which the service is available, see Understanding Translation.

To configure Microsoft Edge for a new locale:

1. Open your Microsoft Edge browser and enter the 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 the 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 Translated Version of the Service

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

For a list of languages in which the service is available, see Understanding Translation.

> **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**.

Recommended Screen Resolution

Display settings recommended for Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management access.

Oracle recommends that you set the screen resolution of your display unit to 1920 x 1080. Additionally, the maximum window scale setting should be set to 125%.

URLs to Access Cloud EPM and Cloud EDM Environments

New Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management subscriptions are supported on Oracle Cloud Infrastructure (OCI), which leverages the OCI Identity and Access Management (IAM) service for security configuration and management. OCI may also be referred to as Oracle Fusion Cloud EPM Gen 2 or simply OCI (Gen 2).

In some cases, customers are still supported on Oracle Cloud Classic, the predecessor to OCI.

When you purchase a subscription, it includes two environments: a test environment and a production environment. You can access both the environments through unique URLs, provided by the Service Administrator. See:

- Classic URLs
- OCI URLs

> **Note**
>
> Users cannot modify the URLs. If the URLs seem difficult to remember, use vanity URLs (configured by Service Administrators) or create unique bookmarks to make it easier to enter them into your browser. See Using Vanity URLs in the *Getting Started Guide for Administrators*.

Classic URLs

Generally, in addition to an application context, the URL of the newly provisioned Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management environments identifies these components:

- Instance name: This is an auto-generated string, which is assigned when you order a 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.
- 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 and EPM Enterprise instances. This includes the URLs of legacy Profitability and Cost Management, Account Reconciliation, Enterprise Data Management, Cloud EDM, and Enterprise Performance Reporting Cloud instances.

This is also used in the URLs of newly provisioned legacy instances of Planning, Planning Modules, Tax Reporting, Enterprise Profitability and Cost Management, and Financial Consolidation and Close

- Data center region: This is the region where the data center that hosts the Cloud EPM and Cloud EDM instances 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 Cloud EPM 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?

As an existing user, you have the option to update your URLs with the new application context. For example, if your legacy URL is:

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

You can update it to:

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

Updating to the new URL is optional; the legacy URL will still work and provide access to 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, Cloud EDM, and Narrative Reporting

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

Account Reconciliation

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

OCI URLs

OCI environments follow this 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 name of your instance, for example, `acme`. To differentiate between test and production environments, Oracle appends `-test` to the instance name for the test environment.
- Cloud Account Name: The name used when creating your cloud account, for example, `epmidm`. This was previously referred to as the Identity Domain Name.
- Oracle Fusion Cloud EPM Service: This is always set to `epm`.
- Data Center Region: The region where the data center hosting your Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management environments is located, for example, `us-phoenix-1`.
- Cloud EPM Domain: The domain, for example, `ocs.oraclecloud.com`, that hosts Cloud EPM.
- Application Context: This is set to `epmcloud`

Based on the sample settings provided, the URLs would 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`

Accessing Cloud EPM and Cloud EDM

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

- User credentials. See Authenticating Using User Credentials.
- Network credentials if your organization configured Single Sign-On (SSO) access. See Authenticating Using Single Sign-On Credentials.

Authenticating Using User 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.

You must have the following information:

- URL to access the environment
- A username
- A password

To access the environment:

1. Go to the provided URL.
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 this is your first time accessing the service, you'll be directed to the **Password Management** screen to set your password.
4. To set your password:
   a. In **Old Password**, enter the temporary password that you received in the email from 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 sign-in process is governed by your organization's SSO configuration. If your setup uses IWA, you may not be prompted to enter a username and password when you access the Oracle Fusion Cloud Enterprise Performance Management or Oracle Fusion Cloud Enterprise Data Management environment.

To access an environment using your SSO credentials:

1. Go to the provided URL of the 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 the 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**.

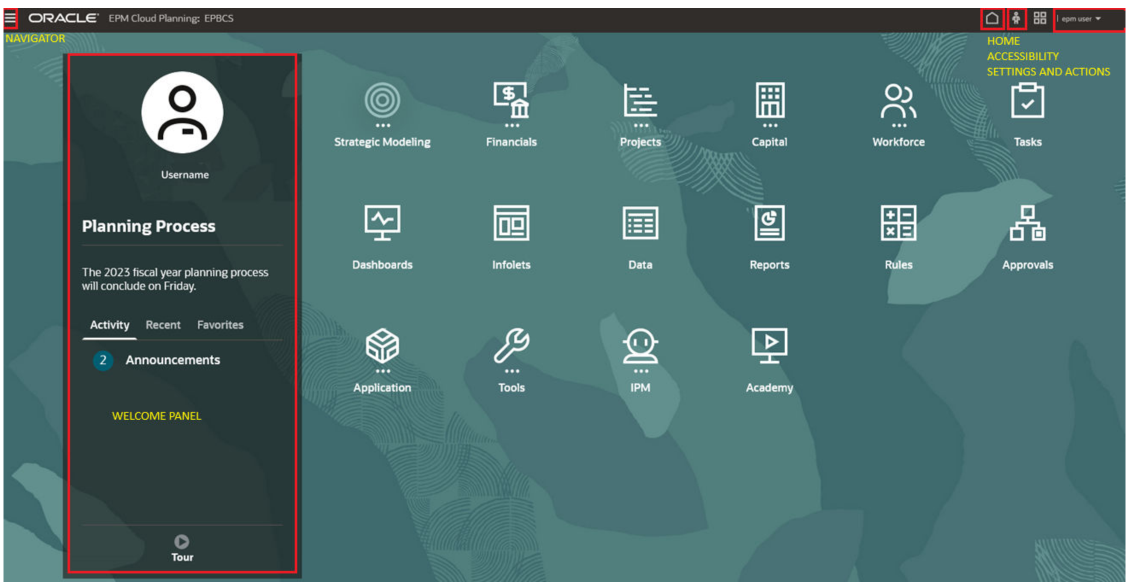
Exploring the User Experience

Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management environments utilize the Redwood Experience, which offers a modern interface with unique features.

The Home Page

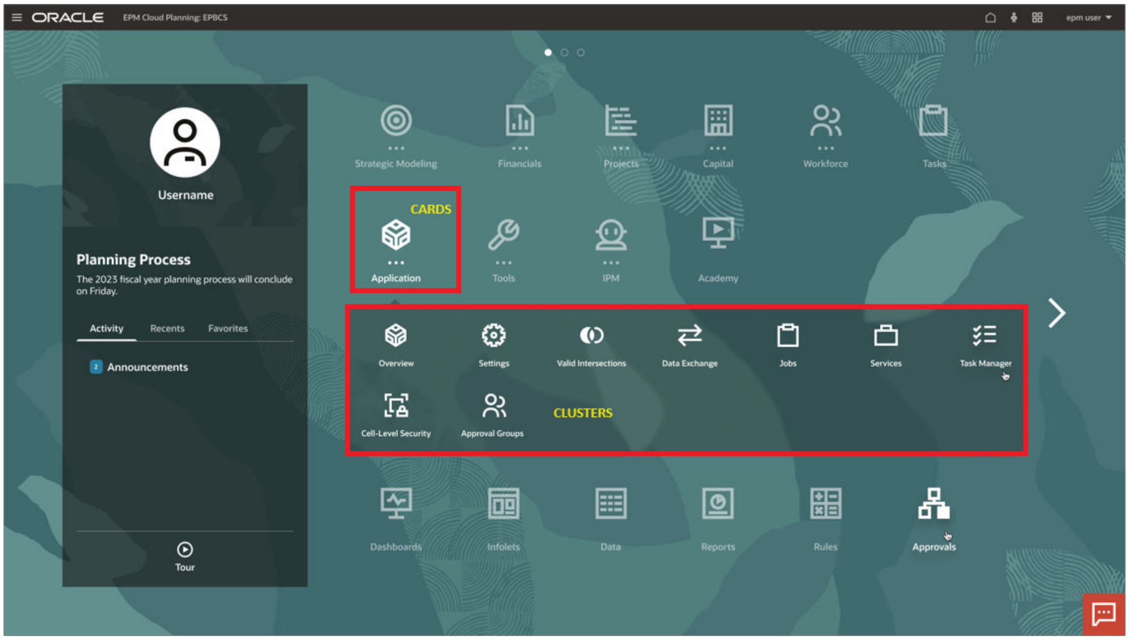
When you sign in to an environment, you will be taken to the Home Page.

- **Navigator** - In the top-left corner, you'll see the Navigator icon. Click it to open a list of shortcuts that match the features and functions available on the Home Page cards.
- **Welcome Panel** - This is located in the center-left of the screen and gives you quick access to important info, like your messages and tasks. The details here may change depending on the service you're using.
- **Home** - On the top-right corner, this icon lets you return to the Home Page from anywhere in the environment.
- **Accessibility** - Right next to the Home icon, the Accessibility icon helps you adjust settings like screen readers and high contrast mode.
- **Settings and Actions**- Click your user name in the top-right corner to access settings such as Help, Provide Feedback, Oracle Support, Sign Out and more. Additionally, you can join Oracle Cloud Customer Connect, a community where members collaborate on common goals and objectives. See Joining Oracle Cloud Customer Connect.



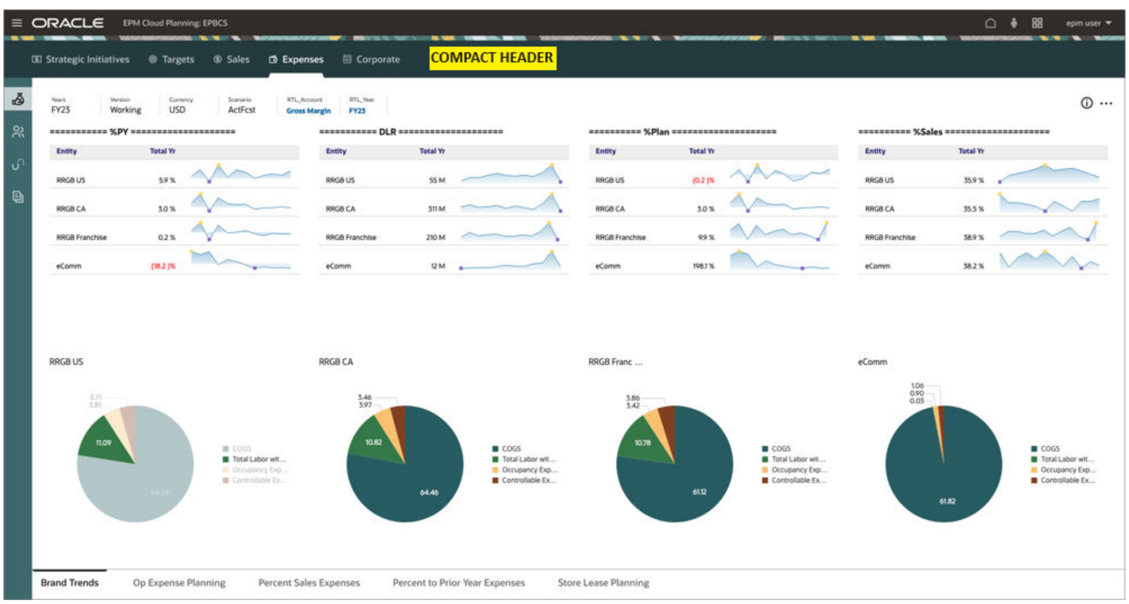
Simplified Cards and Clusters Identification

The Home Page features cards that group various activities you can perform in the environment. These cards offer access to key tasks, tutorials, and related information. Clicking on a card opens a page with available shortcuts, which vary based on your role in the environment. Each card is highlighted with its related cluster of features expanded underneath, making it easier to identify. This layout maintains the existing navigation flow while simplifying the process of locating cards.



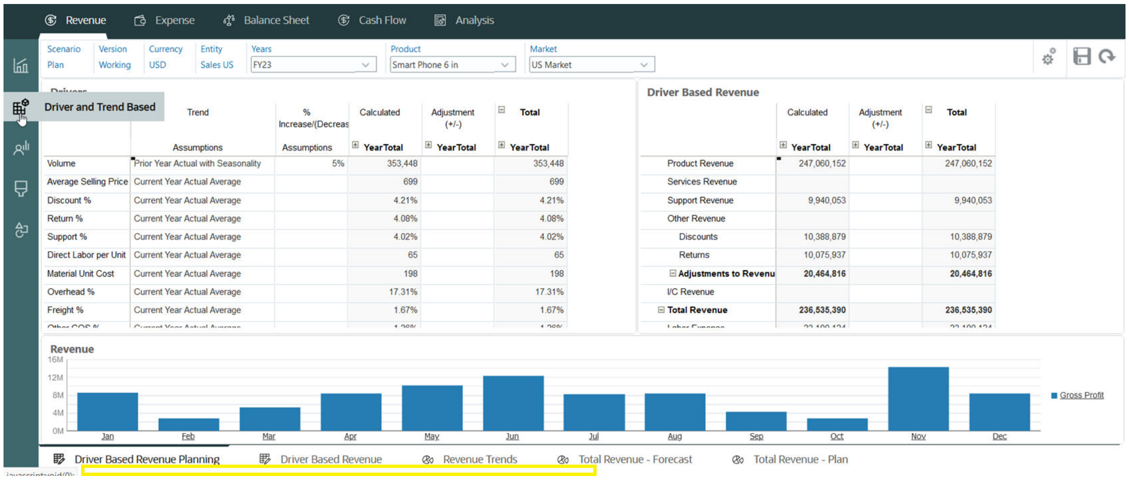
Compact Headers

When you open a card to view a service capability, compact headers at the top of the screen help save space. These headers make it unnecessary to expand or collapse the screen to see information. The color of the compact header matches the selected theme and saves approximately 90 pixels of vertical space, creating more room for URL display at the bottom.



Tabs Positioning

The tabs are located in the left pane, with their corresponding sub-tabs positioned at the bottom of the page for improved clarity and navigation. When you hover over a vertical tab, the tab name appears directly rather than a tooltip. Additionally, more space is allocated to the bottom tab to better accommodate URL display.



Changing Your Password

On your first login, you'll be asked to personalize your password and set challenge question answers for password recovery.

Oracle Fusion Cloud Enterprise Performance Management 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 managed by the identity provider.

To change your password:

1. In a browser, enter the URL of the environment for which you want to change your password.

   Changing password affects your password all the environments in that IAM domain.
2. Click **Forgot Password**.
3. In the **What's your user name?** field, enter your user ID, for example, `john.doe@example.com`.

   A password reset notification will be sent to the recovery email address associated with your username.
4. Open the recovery email and click **Reset Password**.
5. In the **Enter new password** and the **Re-enter new password** field, enter the a new password.
6. Click **Reset Password**.

   You will see a confirmation message. A confirmation email is also sent to your email address.

Joining Oracle Cloud Customer Connect

Overview of accessing Oracle's Oracle Fusion Cloud Enterprise Performance Management customer community and forums.

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 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

Overview of enabling accessibility features in Oracle Fusion Cloud Enterprise Performance Management.

In Cloud EPM, users can enable Accessibility mode for all business processes, except for Enterprise Data Management which is fully accessible by default and does not require enabling Accessibility Mode.

For more information, see Enabling Accessibility in the *Accessibility Guide*.

4

Working with Cloud EPM and Cloud EDM Client Components

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

In This Section:

Available Clients and Utilities for Cloud EPM and Cloud EDM

Depending on your role, you can download components, utilities, and templates for Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management:

- 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
- Sales Planning
- Strategic Workforce Planning
- Enterprise Data Management and Cloud EDM

Clients and Utilities for Power Users and Users

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

- EPM Automate: 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 details.
- Oracle Smart View for Office: Smart View provides a common Microsoft Office interface designed specifically for Cloud EPM.
  These extensions are available in Smart View:

  - Planning Extensions: Planning Extensions include the Planning Admin Extension, which allows application administration activities, such as dimension management, to be performed from within the Excel interface; and Planning application templates, which facilitate application administration activities, such as dimension management, 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. Also referred to as the Planning Admin Extension.
  - Reconciliation Compliance Extension: Enables users to manage reconciliation compliance transactions from the Excel interface.
  - Supplemental Data Manager Extension: Enables users to perform supplemental data management from within the Excel interface.
  - Task Manager Extension: Enables users to update their tasks from within the Excel interface.
  - Enterprise Journals Extension (Financial Consolidation and Close only): Enables users to manage the data collection process and work with journals.
  - Narrative Reporting Extension: Enables users to perform assigned tasks and analyze model data from within the Microsoft Office suite.
  - EPM Books Extension: Enables users to import Books in Microsoft Excel and work with them by changing POV values and refreshing content.
- Oracle Smart View for Office (Mac and Browser): This browser-based version of Smart View is deployed in a web browser on either Windows or Mac systems for analyzing data in Microsoft Excel 365.
  These extensions are available in Oracle Smart View for Office (Mac and Browser):
  - Admin Extension: Provides access to dimension management and application management functionality.
  - EPM Books Extension: Provides the ability to import Books in Microsoft Excel and work with them by changing POV values and refreshing content.

  See these information sources:
  - Deploying and Administering Oracle Smart View for Office (Mac and Browser): Learn about the prerequisites and how to deploy and administer Smart View in Microsoft Excel 365.
  - Working with Oracle Smart View for Office (Mac and Browser): Learn about how to connect and use Smart View features in Microsoft Excel 365 to view and analyze data.
- Oracle Smart View for Google Workspace: This browser-based version of Smart View is deployed on a web browser for analyzing data in Google Sheets.
  See these information sources:
  - Getting Started with Oracle Smart View for Google Workspace: Learn about the prerequisites and the installation information required to install Smart View in Google Sheets.
  - Working with Oracle Smart View for Google Workspace: Learn about how to connect and use Smart View features in Google Sheets to view and analyze data.
- Financial Reporting Web Studio: This extension 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 extension to Smart View works with valid forms to predict performance based on historical data.
- Sample Content: This provides sample report packages, management reports, dimension and data load files, and a sample application.

Account Reconciliation

- EPM Automate
- Smart View for Office
- Smart View Extension for Reconciliation Compliance

Enterprise Profitability and Cost Management

- EPM Automate
- Smart View for Office, Smart View for Office (Mac and Browser), and Smart View for Google Workspace
  Enterprise Profitability and Cost Management is supported only on Smart View version 22.100 or newer
- Smart View Extensions:
  - Planning Extensions
  - Task Manager

Financial Consolidation and Close and Tax Reporting

- Smart View for Office, Smart View for Office (Mac and Browser), and Smart View for Google Workspace
- Smart View Extensions:
  - Smart View Add-On For Administrator
  - Task Manager
  - Supplemental Data
  - Enterprise Journals (for Financial Consolidation and Close only)

Narrative Reporting

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

Planning, Planning Modules, and FreeForm

- EPM Automate
- Smart View for Office, Smart View for Office (Mac and Browser), and Smart View for Google Workspace
- Smart View extensions:
  - Planning Extensions

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

Profitability and Cost Management

- EPM Automate
- Smart View for Office
- Financial Reporting Web Studio

Sales Planning

- EPM Automate
- Predictive Planning
- Smart View
- Planning Admin Extension
- Strategic Modeling

Strategic Workforce Planning

- Smart View
- Planning Admin Extension
- Predictive Planning

Enterprise Data Management and Cloud EDM

EPM Automate

Smart View Prerequisites

Overview of requirements for using Oracle Oracle Smart View for Office with Oracle Fusion Cloud Enterprise Performance Management.

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 Cloud EPM update. For example, Smart View version 24.100 and 23.200 are supported for Cloud EPM 24.06 update. It should be in .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.

To know the prerequisites for Smart View for Office (Mac and Browser) and Smart View for Google Workspace, see:

- Prerequisites in *Deploying and Administering Oracle Smart View for Office (Mac and Browser)*
- Prerequisites in *Getting Started with Oracle Smart View for Google Workspace*

Using Smart View and Calculation Manager for Cloud EPM

Overview of Oracle Smart View for Office and Calculation Manager usage across Oracle Fusion Cloud Enterprise Performance Management business processes.

Smart View

Except Account Reconciliation, all Cloud EPM business processes use Smart View as a client component.

Calculation Manager

All Cloud EPM business processes except these use Calculation Manager:

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

Downloading and Installing Clients

You download Oracle Fusion Cloud Enterprise Performance Management 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 the *Working with EPM Automate* guide.

To install Cloud EPM clients:

1. Sign in to an environment. See Accessing Cloud EPM and Cloud EDM.
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 Business Process Using Smart View

You can use a shared connection or a private connection to access 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:** To connect Smart View to an Oracle Fusion Cloud Enterprise Performance Management environment, use the public URL that you would normally use to access the environment in a browser. See Configuring a Shared Connection.
- **Private connections:** Use the specific URL for the Cloud EPM environment to connect Smart View to that environment. See Configuring a Private Connection.

See Shared Connections and Private Connections in *Smart View for Office User's Guide 24.200* 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.

Refer to Sample URLs for the Oracle Fusion Cloud Enterprise Performance Management URL pattern.

Shared Connections

In the Cloud EPM URL, replace `epmcloud` with `/workspace/SmartViewProviders` to derive the shared connection URL. For example: your shared connection URL may be `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/workspace/SmartViewProviders`.

Private Connections

You use a variation of the Cloud EPM URL pattern (see Sample URLs) to derive private connection URLs.

- **Narrative Reporting**: Replace `epmcloud` with `/epm/SmartView`. For example: your private connection URL may be `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/epm/SmartView`.
- **Profitability and Cost Management**: Replace `epmcloud` with `/aps/SmartView`. For example: your private connection URL may be `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/aps/SmartView`.
- **Planning, Financial Consolidation and Close, Enterprise Profitability and Cost Management, and Tax Reporting**: Replace `epmcloud` with `/HyperionPlanning/SmartView`. For example: your private connection URL may be `https://acme-epmidm.epm.us-phoenix-1.ocs.oraclecloud.com/HyperionPlanning/SmartView`.

Configuring Connections in Smart View

After installing Oracle Smart View for Office, you must set up a connection to an Oracle Fusion Cloud Enterprise Performance Management environment.

- Configuring a Shared Connection
- Configuring a Private Connection

Troubleshooting

See Fixing Smart View Issues in the *Operations Guide*.

Configuring a Shared Connection

Steps to set up a shared Smart View connection for Oracle Fusion Cloud Enterprise Performance Management.

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

Steps to configure a private Oracle Smart View for Office connection for Oracle Fusion Cloud Enterprise Performance Management.

See Using the Quick Connection Method in *Smart View for Office User's Guide 24* 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 Cloud EPM and Cloud EDM.
2. Click (Navigator), and then select **Reporting Web Studio**.

5

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 the Oracle Fusion Cloud Enterprise Performance Management and Oracle Fusion Cloud Enterprise Data Management environments.

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.

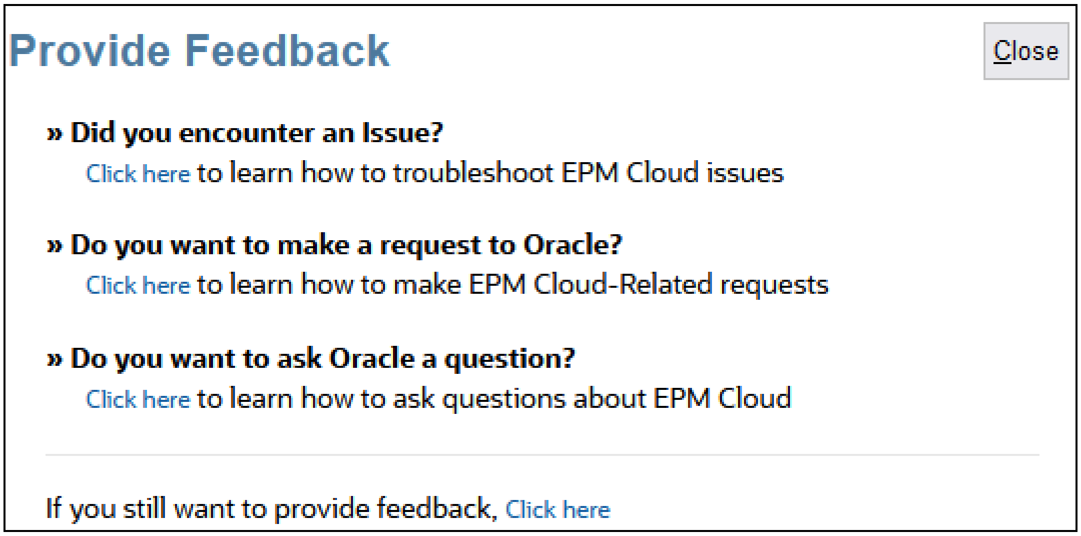
Each Service Administrator can turn off the notification by clicking the **Unsubscribe** link embedded in the email. See Disabling Feedback Notification. Regardless of the subscription status, a notification is always sent to the user who submits the feedback.

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 Information Using Provide Feedback

1. While you are in the screen about which you want to provide feedback, access the Provide Feedback utility using one of these options.
   - Click your user name (displayed at the right top corner of the screen), and then select **Provide Feedback**.
   - **For business processes other than Oracle Fusion Cloud Enterprise Data Management:** If you are in an Access Control or Migration modal window, click (User Assistance) and then select **Provide Feedback**.
2. **Provide Feedback** lists links to self-learn how to resolve specific issues. If you still want to provide feedback, click the link at the bottom.



3. **Mandatory:** In **Give a brief description**, describe the issue that you encountered.
4. **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.
5. Click (Add button) to capture the screenshot.
6. **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 these steps to add more screenshots.
7. Click **Submit**.
8. Review the **Environment** and **Plugins** information.
9. Click (Next) to review screenshots.
10. Click **Submit**.
11. **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.
12. 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**.