

Oracle® Cloud

Administering and Working with Oracle Enterprise Data Management Cloud Learning Path



F17397-07



Oracle Cloud Administering and Working with Oracle Enterprise Data Management Cloud Learning Path,
F17397-07

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1

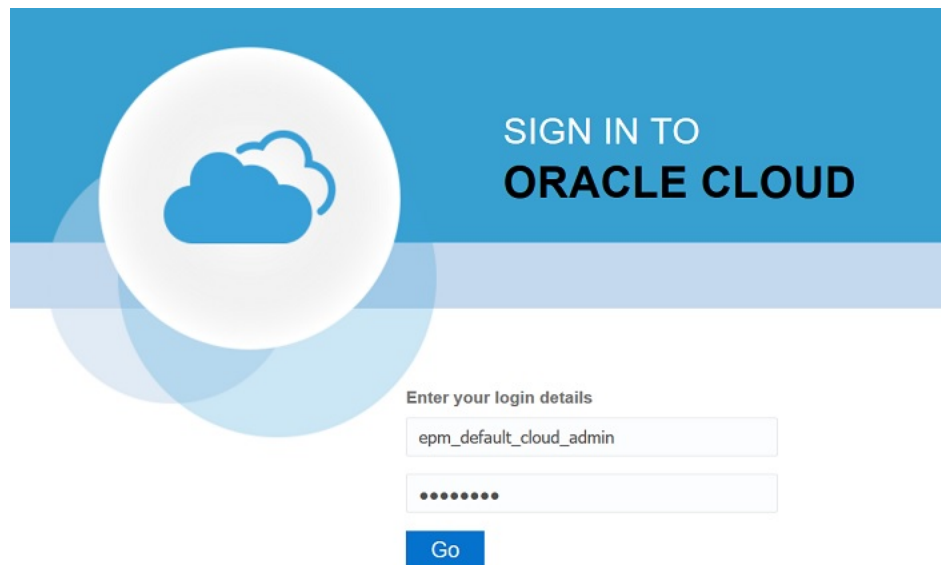
Workflow Approvals

Related Topics

- [Sign in as a Service Administrator](#)
- [Add Users to Groups](#)
- [Enable Approval Policies and Add Approval Groups](#)
- [Sign Out as a Service Administrator](#)
- [Create a Request](#)
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Sign in as a Service Administrator

Sign in to Oracle Enterprise Data Management Cloud as a service administrator.



Add Users to Groups

System administrators assign users to groups. In this example, we will:

- Add a user named Alex Smith to the *Analyst* group
- Add a user named Anita Kennedy to the *Interactive User* group

- Add a user named Kerry Lane to the *Super User* group

These groups have already been granted permissions to the dimensions.

 **Note:**

Since the Enterprise Data Management snapshot you imported for this learning path does not contain users, you must use your own users in place of Alex, Anita, and Kerry.

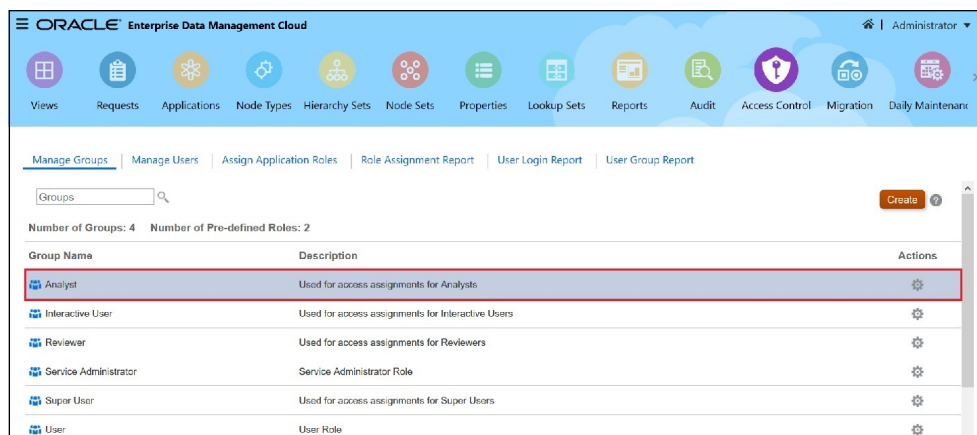
To add users to groups, from the Enterprise Data Management Cloud Home page, select **Access Control**.



Add Alex Smith to the Analyst Group

First, we will add Alex Smith to the Analyst group. Alex is the user who will create the initial request.

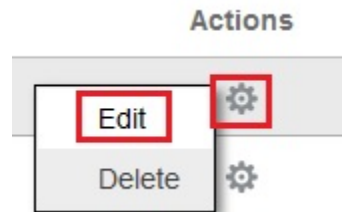
1. Select the **Analyst** group.



2. Click the **Actions**



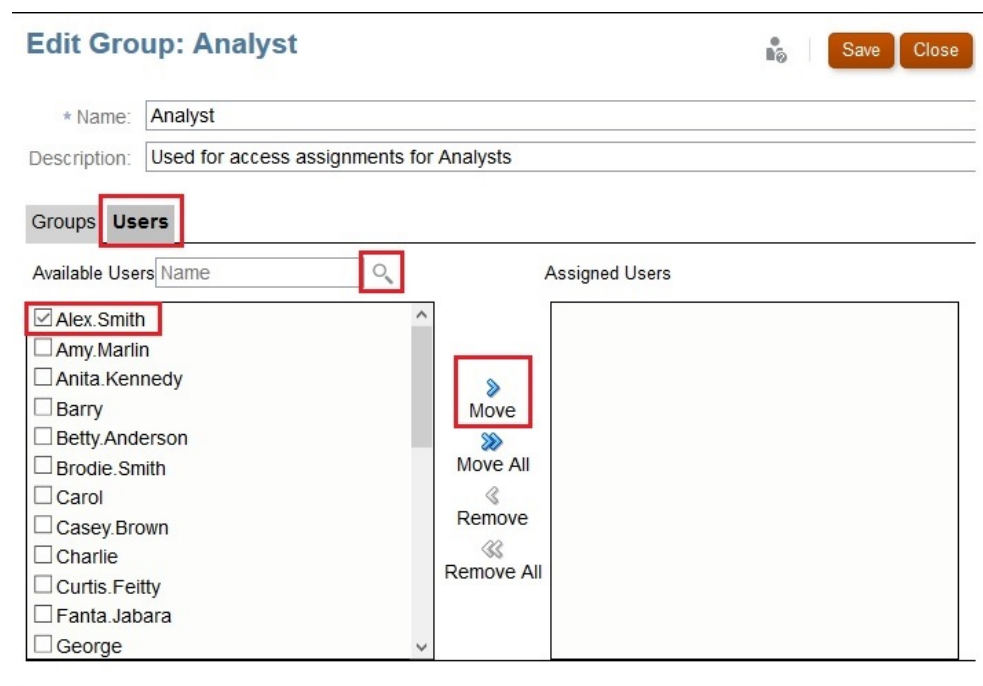
icon, and then select **Edit**.



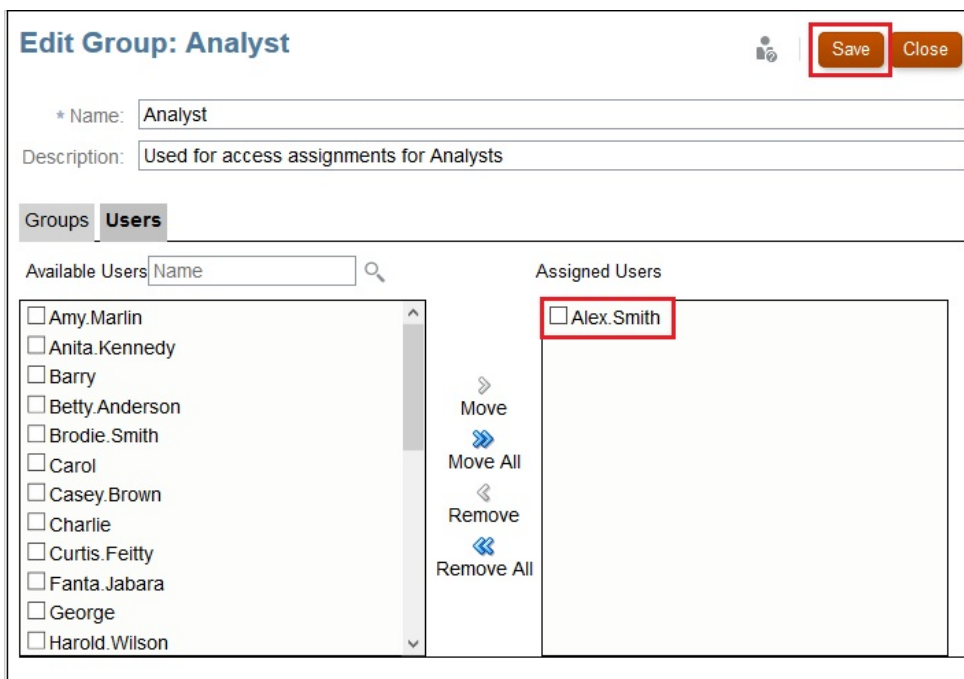
3. In the **Edit Group: Analyst** dialog box, select **Users**, and then click the **Search**



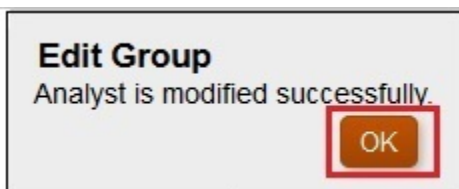
icon to display all the users. Select **Alex Smith**, and then click **Move** to move him to **Assigned Users**.



4. Click **Save** to save the selection of Alex Smith as an assigned user in the Analyst group.



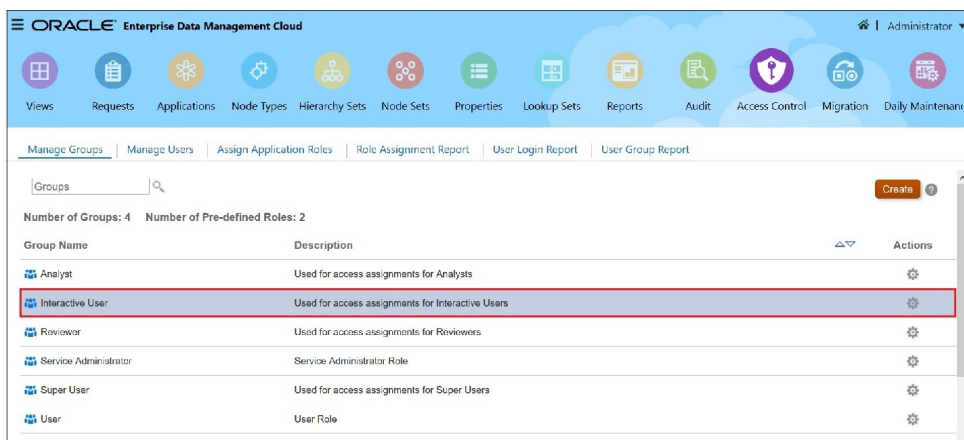
- Click **OK** in the dialog box that is displayed letting you know that the Analyst group was modified successfully.



Add Anita Kennedy to the Interactive User Group

Next we will add Anita Kennedy to the Interactive User group. Anita is going to collaborate on Alex's request and submit it for approval.

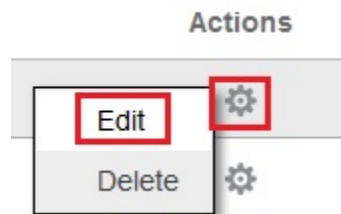
- Select the **Interactive User** group.



2. Click the **Actions**



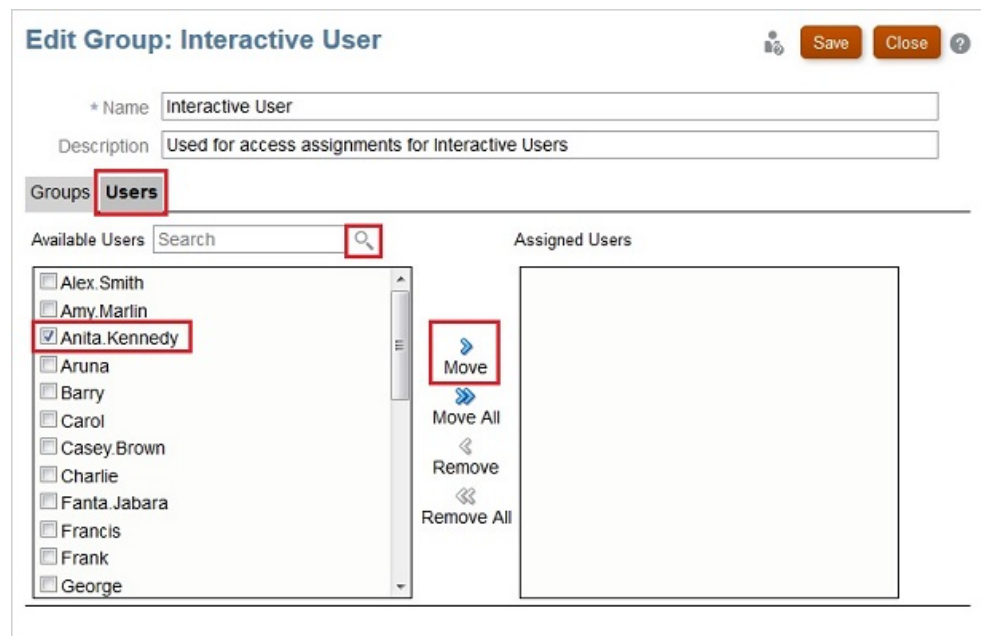
icon, and then select **Edit**.



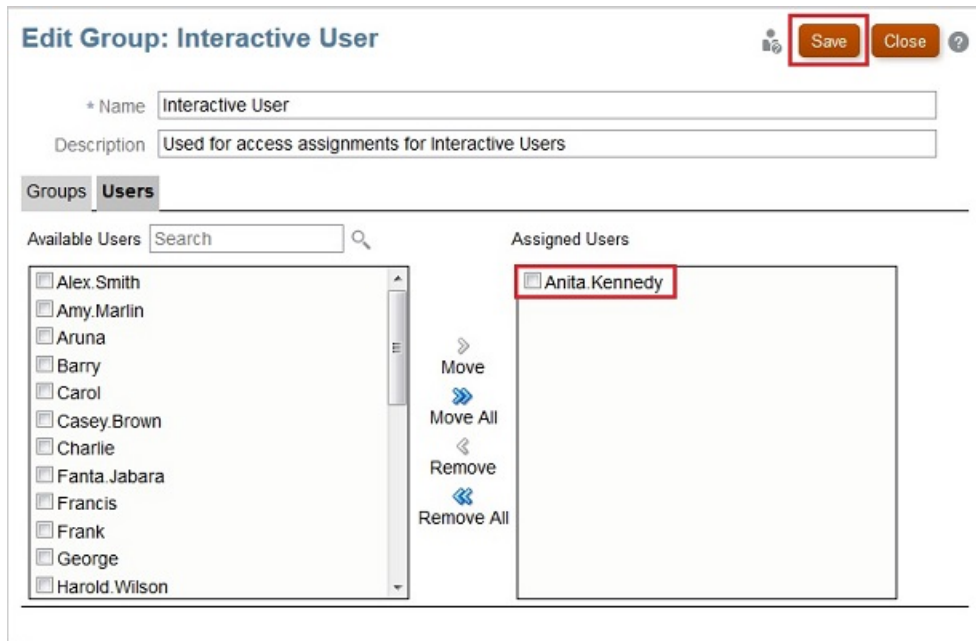
3. In the **Edit Group: Interactive User** dialog box, select **Users**, and then click the **Search**



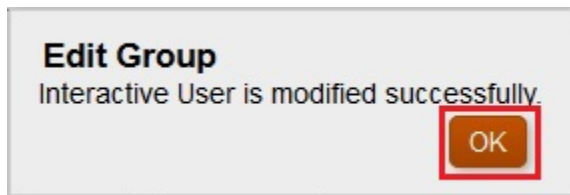
icon to display all the users. Select **Anita Kennedy**, and then click **Move** to move her to **Assigned Users**.



4. Click **Save** to save the selection of Anita Kennedy as an assigned user in the Interactive User group.



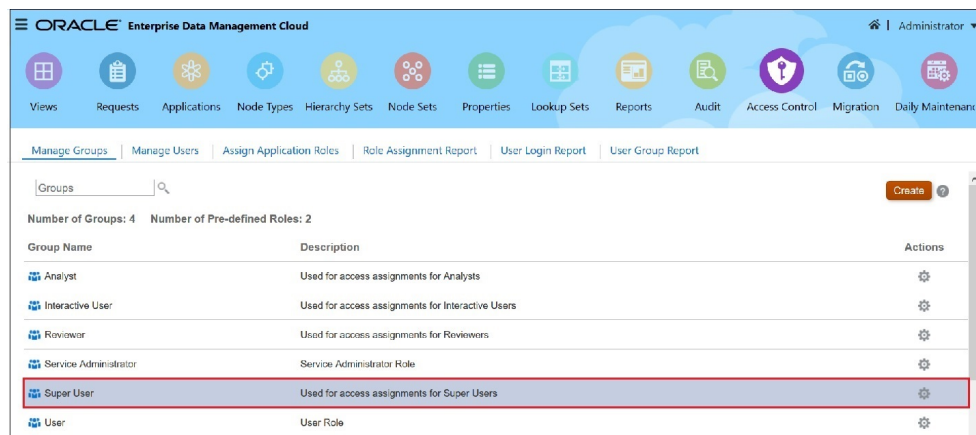
- Click **OK** in the dialog box that is displayed letting you know that the Interactive User group was modified successfully.



Add Kerry Lane to the Super User Group

Finally, we will add Kerry Lane to the Super User group so that he can approve the request.

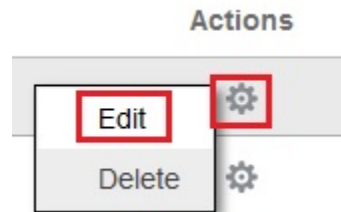
- Select the **Super User** group.



2. Click the **Actions**



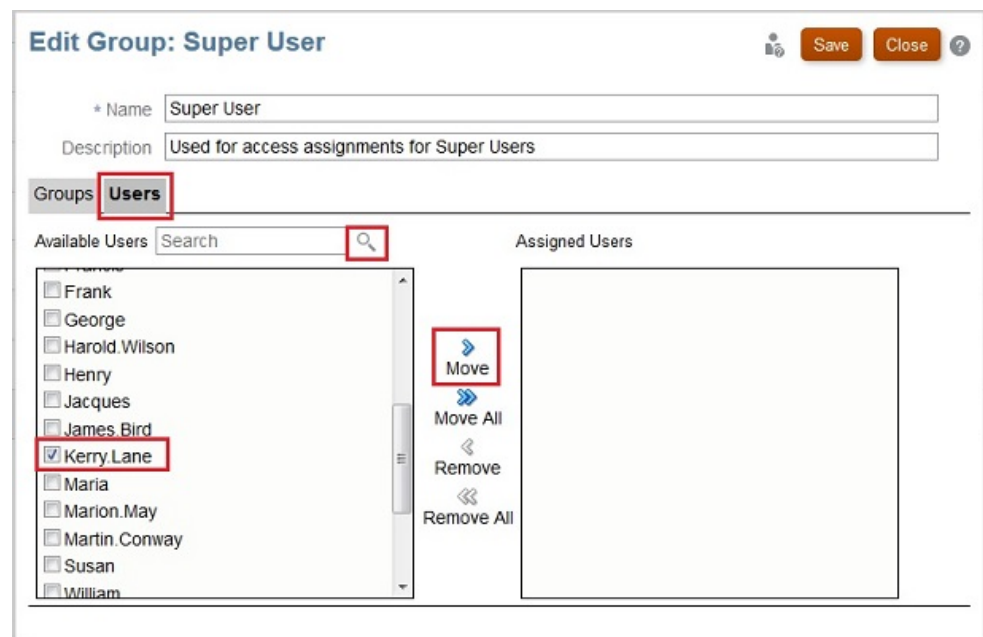
icon, and then select **Edit**.



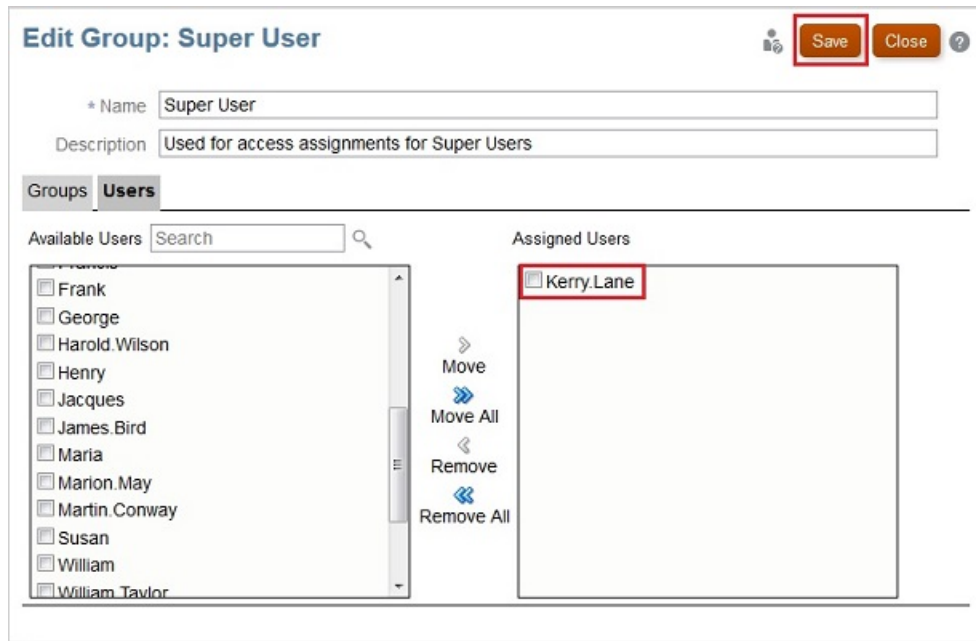
3. In the **Edit Group: Super User** dialog box, select **Users**, and then click the **Search**



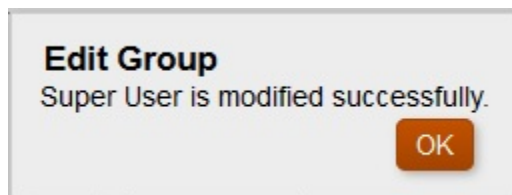
icon to display all the users. Select **Kerry Lane**, and then click **Move** to move him to **Assigned Users**.



4. Click **Save** to save the selection of Kerry Lane as an assigned user in the Super User group.



5. Click **OK** in the dialog box that is displayed letting you know that the Super User group was modified successfully.



Enable Approval Policies and Add Approval Groups

The next step is to enable the approval policy on each dimension. The Entity Maintenance view has three viewpoints representing the General Ledger, Consolidation and Close, and Planning applications. Each viewpoint uses a unique dimension, and the approval policy must be enabled for each dimension.

Recall that we added Kerry Lane to the *Super User* group. This allows him to review the changes associated with all three viewpoints, and he will be able to approve requests. In addition to enabling the approval policy, we will also add *Super User* as an approval group for each viewpoint.

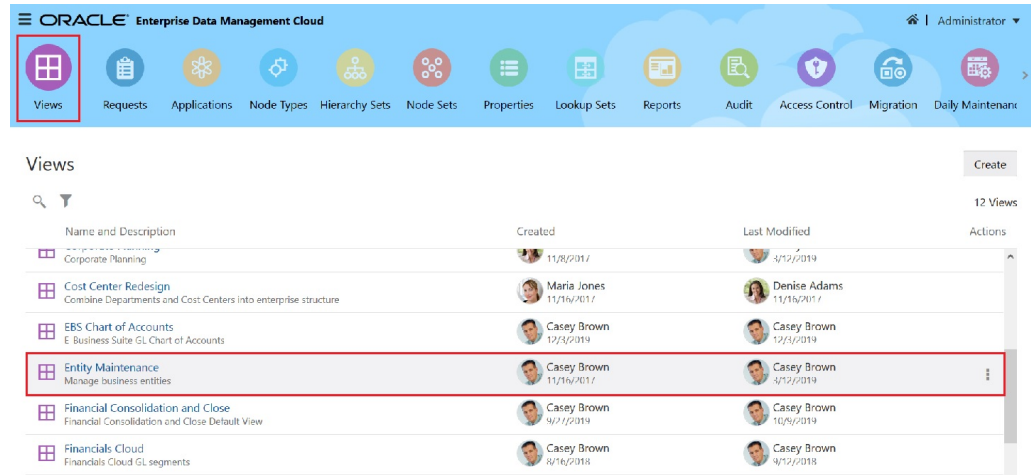
To do this, we will:

- Access the *Entity Maintenance* view
- Enable the approval policy and add the *Super User* group as an approver of changes to the *Corporate Company* dimension in the *General Ledger* viewpoint
- Enable the approval policy and add the *Super User* group as an approver of changes to the *Entity* dimension in the *Consolidation and Close* viewpoint

- Enable the approval policy and add the *Super User* group as an approver of changes to the *Entity* dimension in the *Planning* viewpoint

Access the Entity Maintenance View

To access the Entity Maintenance view, from the Enterprise Data Management Cloud Home page, select **Views**, and then select the **Entity Maintenance** view.



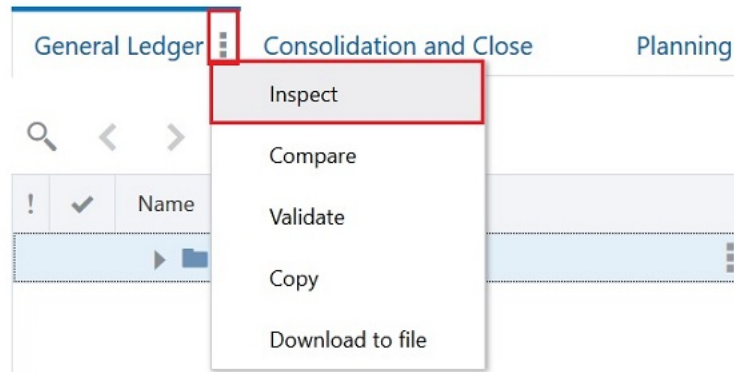
Enable the Approval Policy and Add the *Super User* Group to the *Corporate Company* Dimension in the *General Ledger* Viewpoint

1. Click

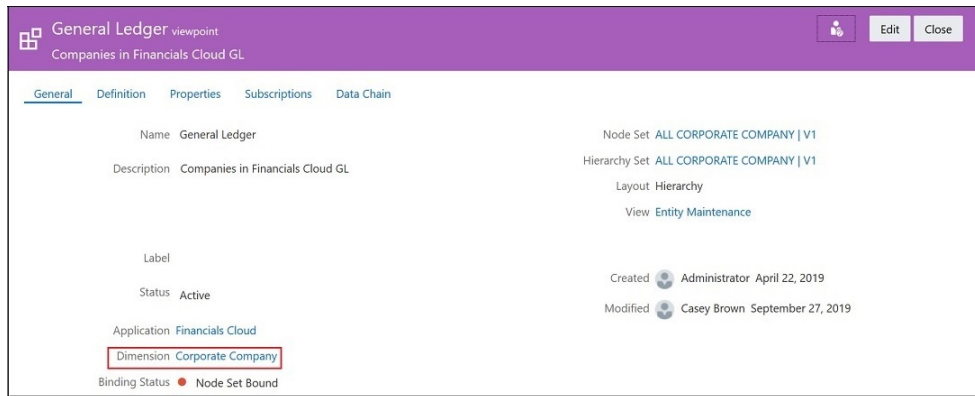


next to the **General Ledger** viewpoint, and then select **Inspect**.

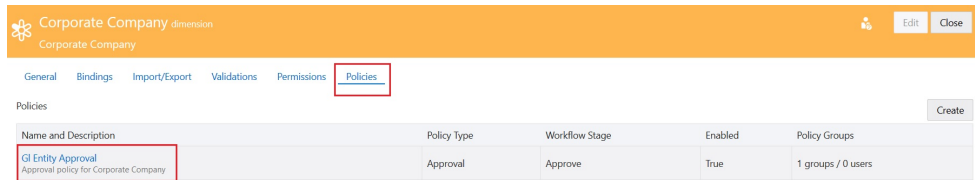
Entity Maintenance



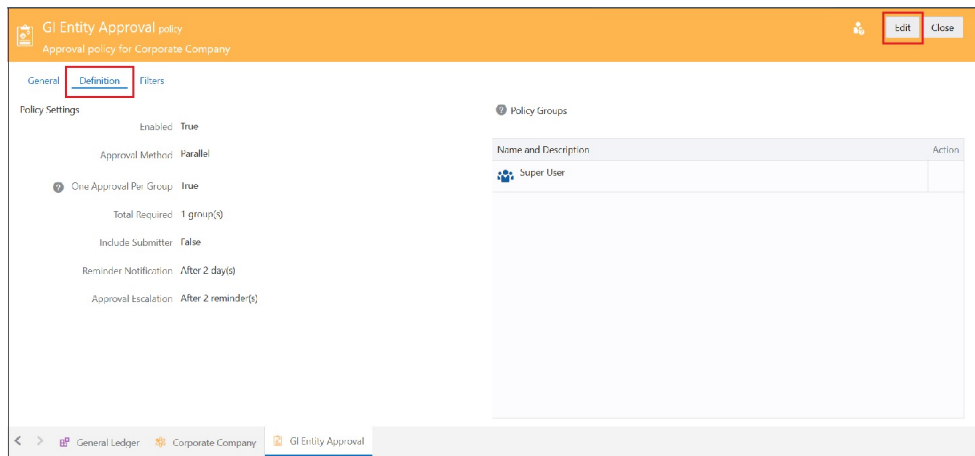
2. In the General Ledger viewpoint, select the **Corporate Company** dimension.



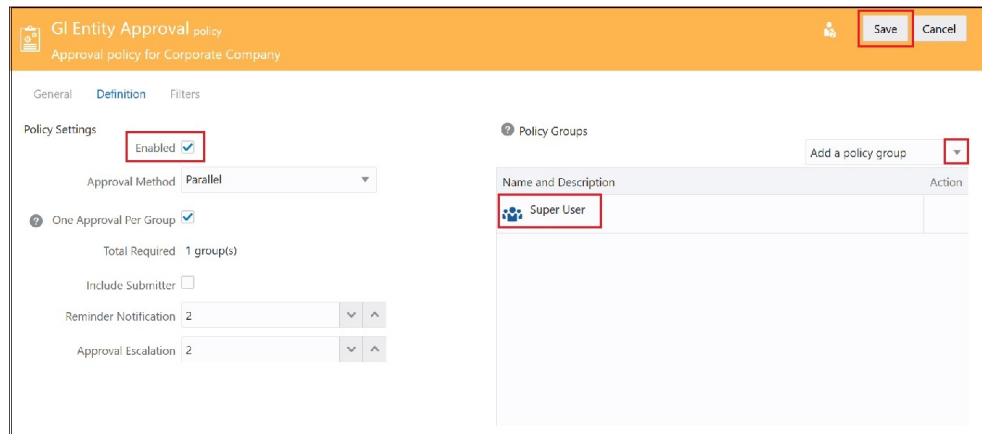
3. In the Corporate Company dimension, select **Policies**, and then select the **GL Entity Approval** policy.



4. Select **Definition**, and then click **Edit**.



5. Select **Enabled** to enable the GL Entity Approval policy. Then, click the arrow next to **Add an policy group**, select **Super User**, and the click **Save**.



6. Click **Close** to return to the Entity Maintenance screen.



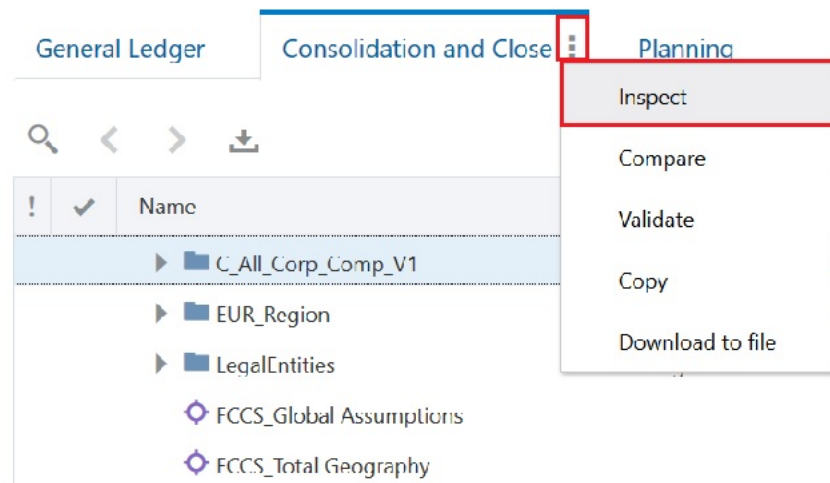
Enable the Approval Policy and Add the *Super User* Group to the *Entity* Dimension in the *Consolidation and Close* Viewpoint

1. Click

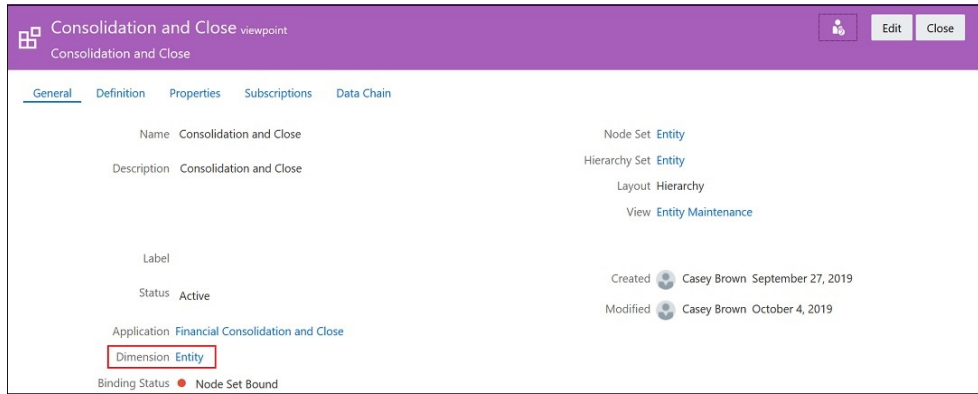


next to the **Consolidation and Close** viewpoint, and then select **Inspect**.

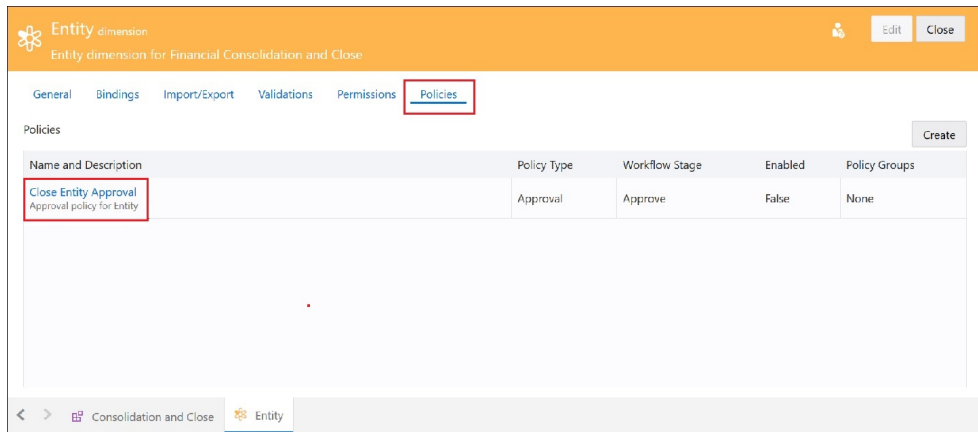
Entity Maintenance



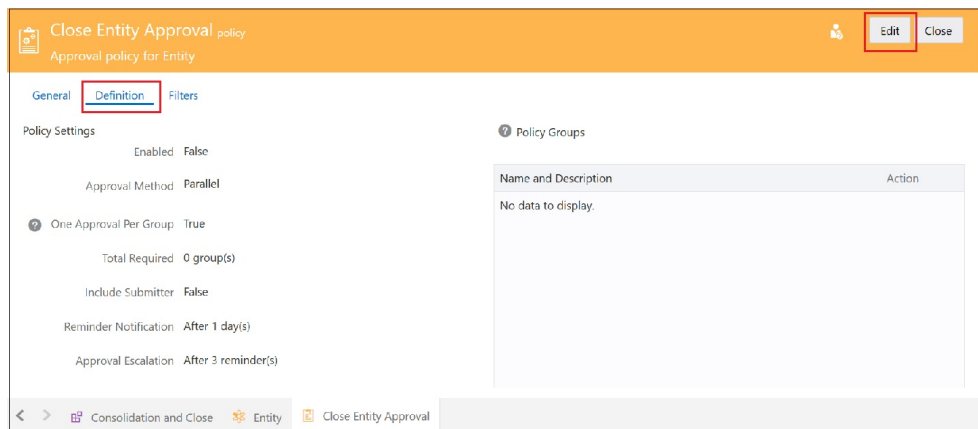
2. In the Consolidation and Close viewpoint, select the **Entity** dimension.



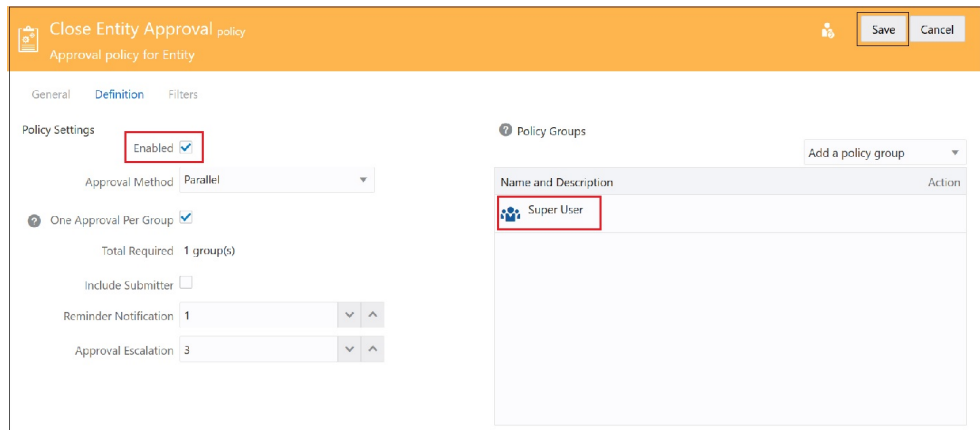
3. In the Entity dimension, select **Policies**, and then select the **Close Entity Approval** policy.



4. Select **Definition**, and then click **Edit**.



5. Select **Enabled** to enable the Close Entity Approval policy. Then, click the arrow next to **Add a policy group**, select **Super User**, and click **Save**.



6. Click **Close** to return to the Entity Maintenance screen.

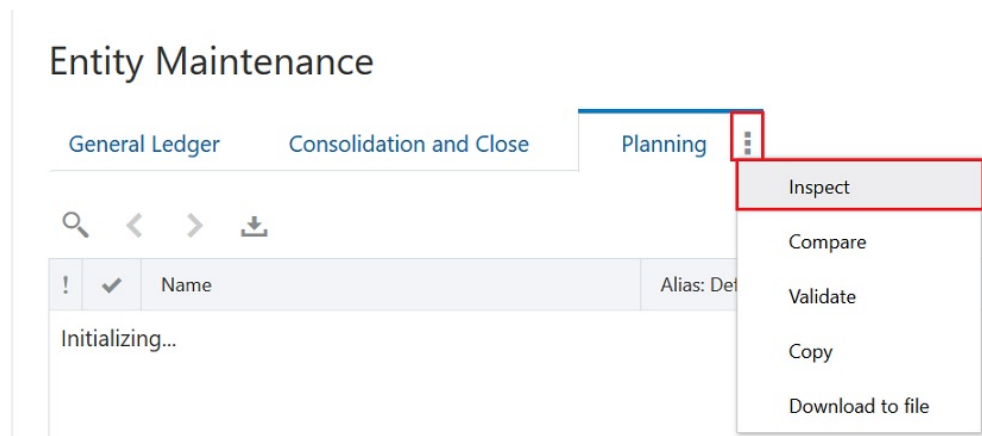


Enable the Approval Policy and Add the *Super User* Group to the *Entity* Dimension in the *Planning* Viewpoint

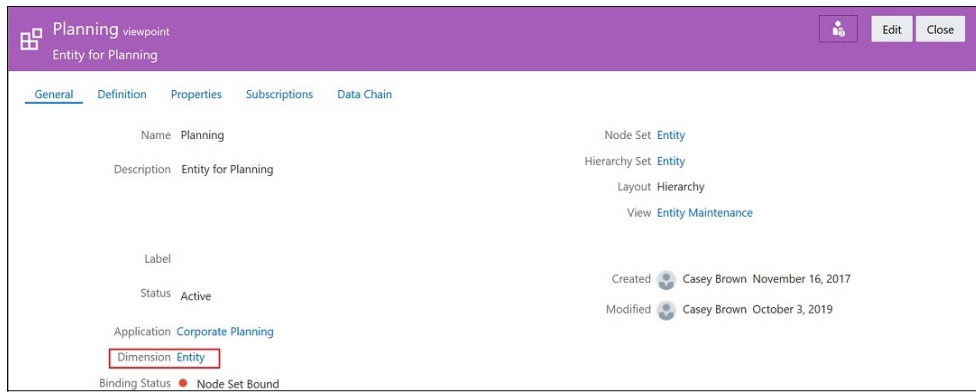
1. Click



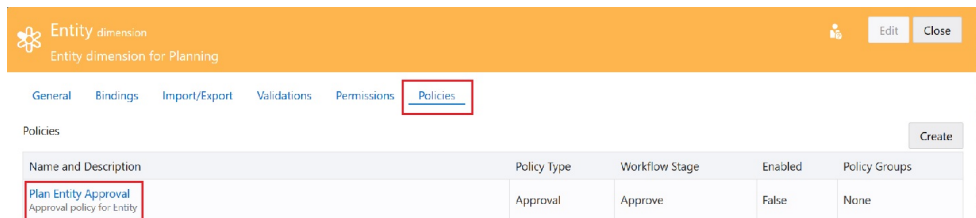
next to the **Planning** viewpoint, and then select **Inspect**.



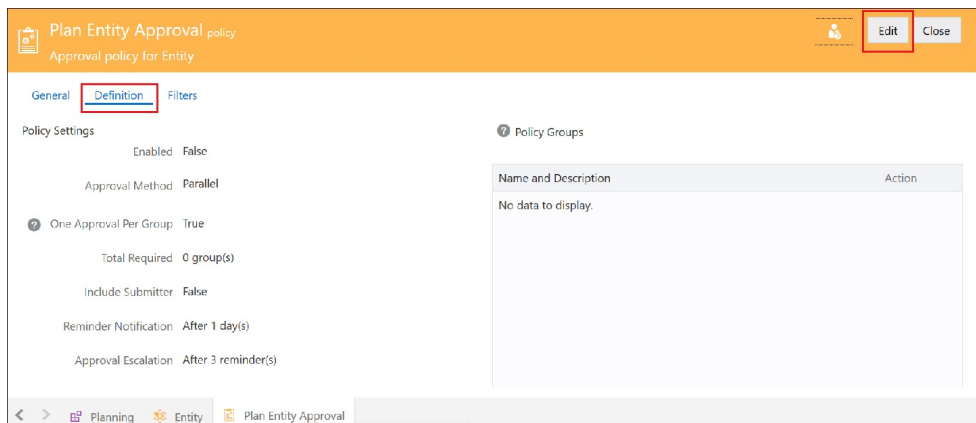
2. In the Planning viewpoint, select the **Entity** dimension.



3. In the Entity dimension, select **Policies**, and then select the **Plan Entity Approval** policy.



4. Select **Definition**, and then click **Edit**.



5. Select **Enabled** to enable the Plan Entity Approval policy. Then, click the arrow next to **Add a a policy group**, select **Super User**, and then click **Save**.

Plan Entity Approval policy
Approval policy for Entity

General Definition Filters

Policy Settings

Enabled

Approval Method Parallel

One Approval Per Group

Total Required 1 group(s)

Include Submitter

Reminder Notification 1

Approval Escalation 3

Policy Groups

Add a policy group

Name and Description	Action
Super User	

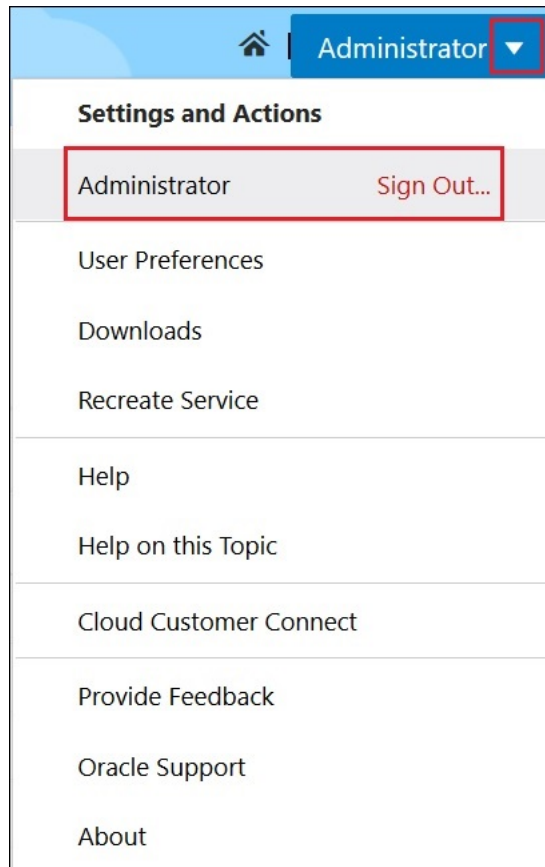
6. Click **Close** to return to the Entity Maintenance view.

Plan Entity Approval policy
Approval policy for Entity

Edit Close

Sign Out as a Service Administrator

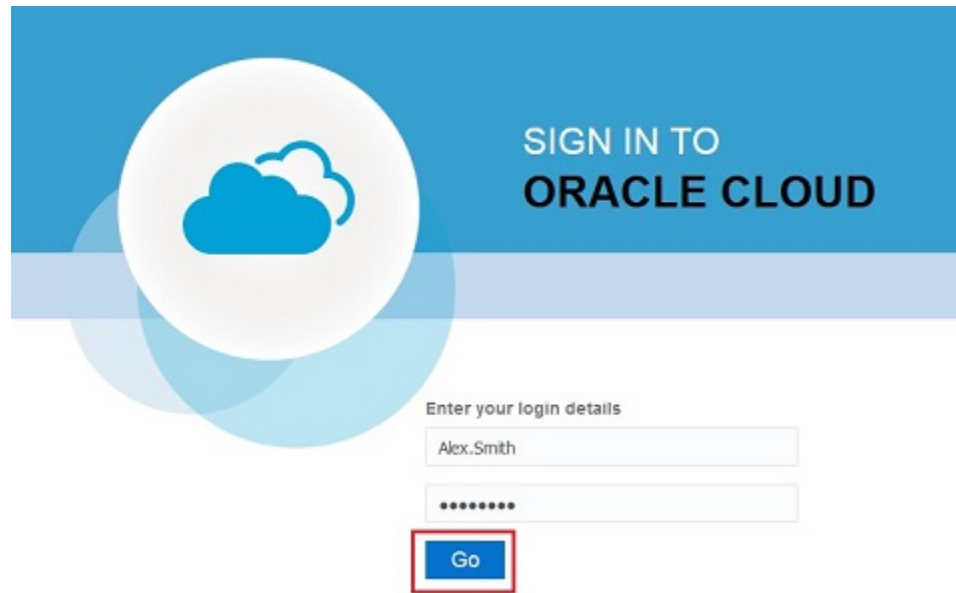
We have now completed the service administrator steps in the workflow approval process. To sign out, click the arrow next to **Administrator** at the top right of the screen, and then select **Sign Out**.



Create a Request

In this step, a user named Alex Smith is going to create a request to add a two nodes to the North America hierarchy in the General Ledger application. The two nodes are contained in a file that Alex is going to load.

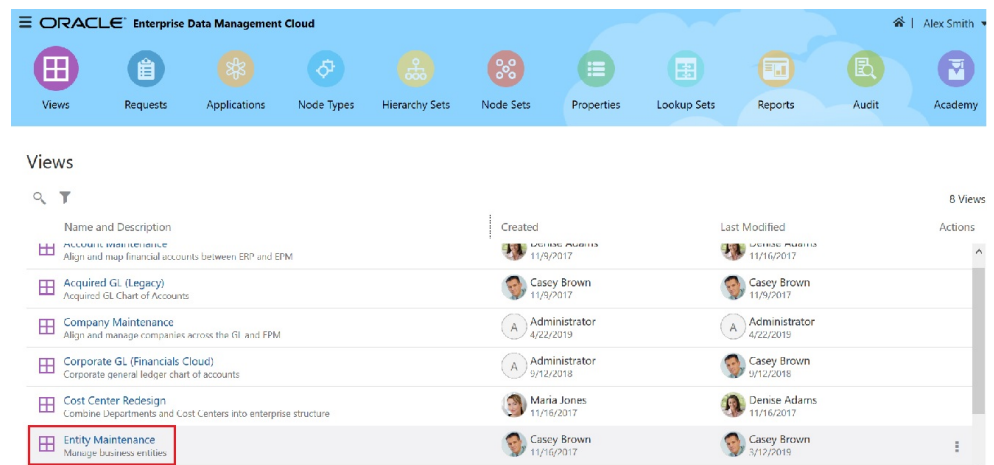
1. On the Oracle Cloud Sign In screen, sign in as Alex Smith.



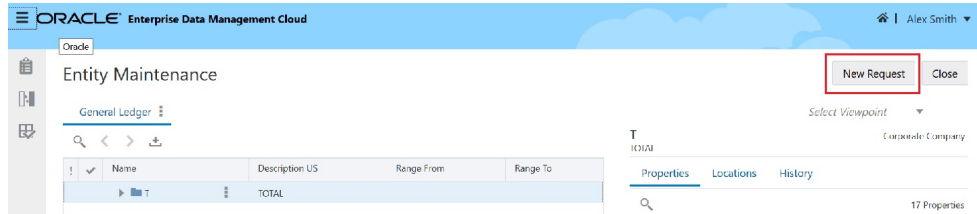
2. From the Enterprise Data Management Cloud Home page, select **Views**.



3. Select the **Entity Maintenance** view.



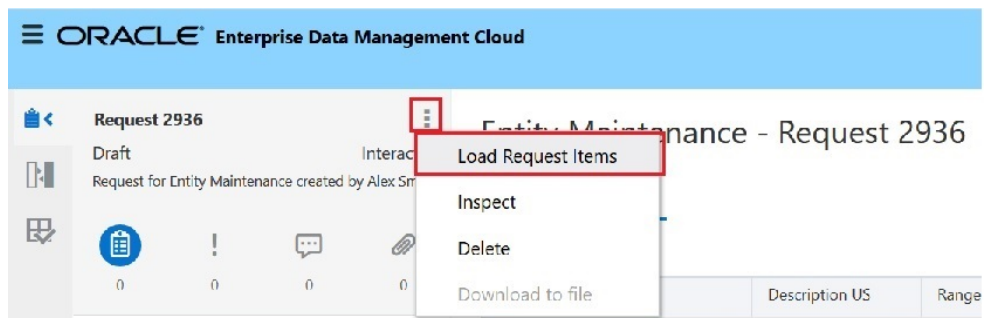
4. Select **New Request**.



5. Click

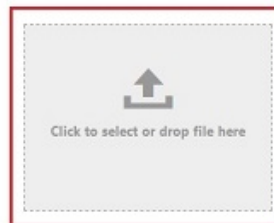
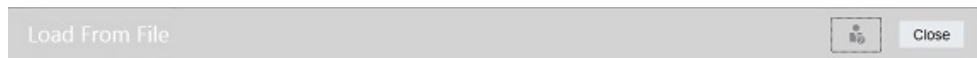


and select **Load Request Items**.



Note: The load file is automatically attached to the request.

6. Select the **GL-Entity-Updates.xlsx** file that you saved to your local drive.



7. Click **Load** to load the information in the file.

Load From File Load Cancel

File Name: GL-Entity-Updates.xlsx Viewpoint: General Ledger
 Sheet: General Ledger Description: Companies in Financials Cloud GL

Columns to Load Row/Column Count: 2/12

Column Header	Name	Description	Node Type	Enabled	Start Date
Data Preview	121	US1 Health	Corporate Company	True	
	141	US1 Support	Corporate Company	True	

8. After reviewing the results summary, click **Close**.

Load From File Close

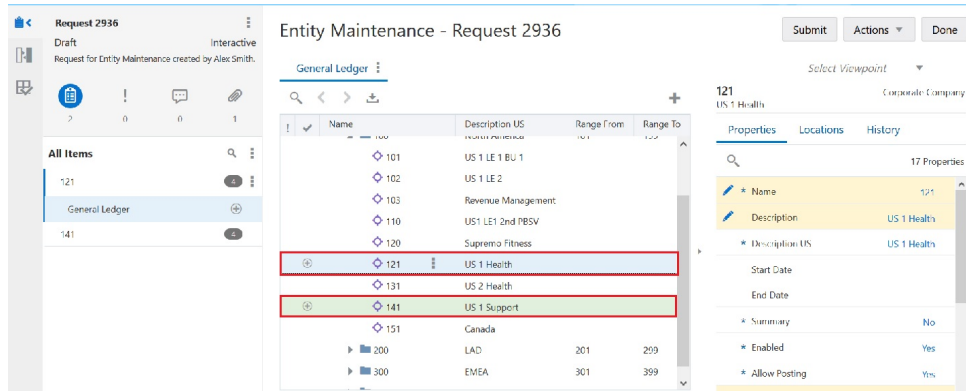
File Name: GL-Entity-Updates.xlsx Viewpoint: General Ledger
 Sheet: General Ledger Description: Companies in Financials Cloud GL


Results Summary

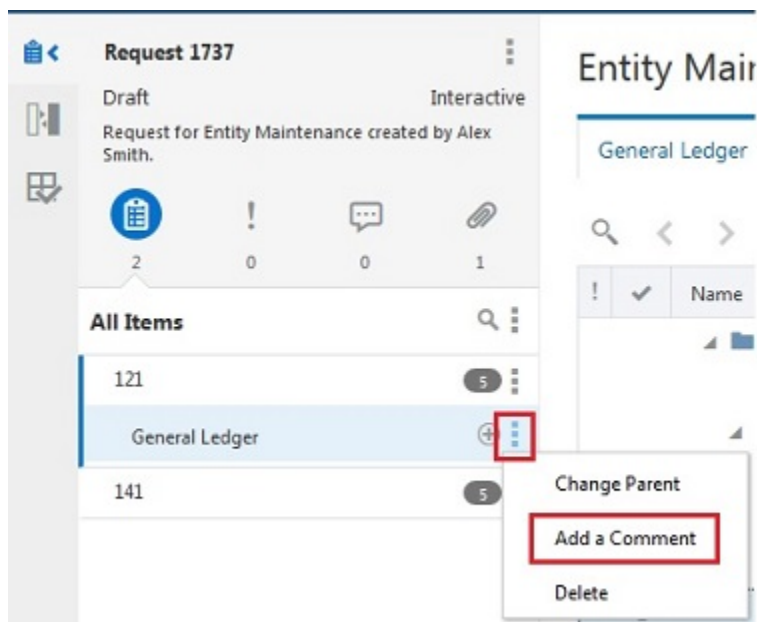
Rows Loaded 2
 Rows Processed 2
 Rows Skipped 0

✔ The file was successfully loaded into the request.

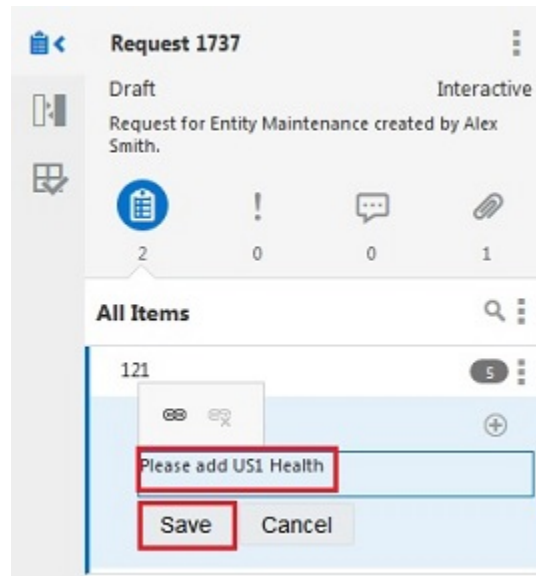
Note that two new nodes were added: **121, US1 Health** and **141, US1Support**.



9. Add a comment further explaining the request to add **121, US1 Health**. To do this, click  next to **General Ledger** and select **Add a Comment**.



10. Enter "Please add US1 Health", and then click **Save**.



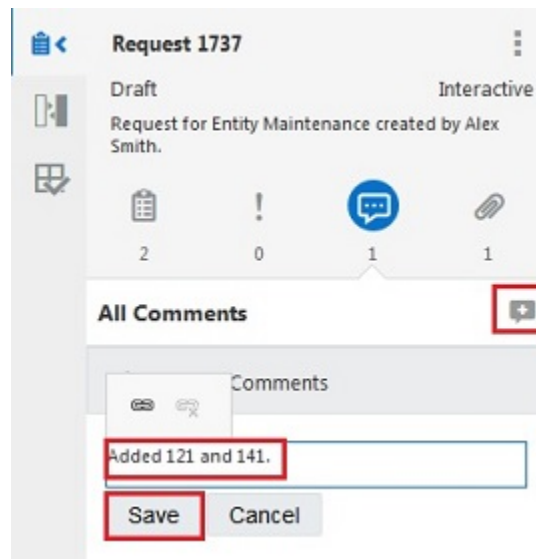
11. Add a comment for the overall request. To do this, click the **Comments**



icon. Then click



next to **All Comments**, enter "Added 121 and 141", and click **Save**.

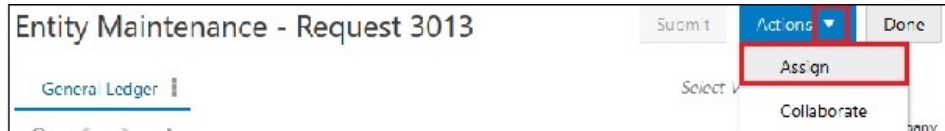


Assign a Request

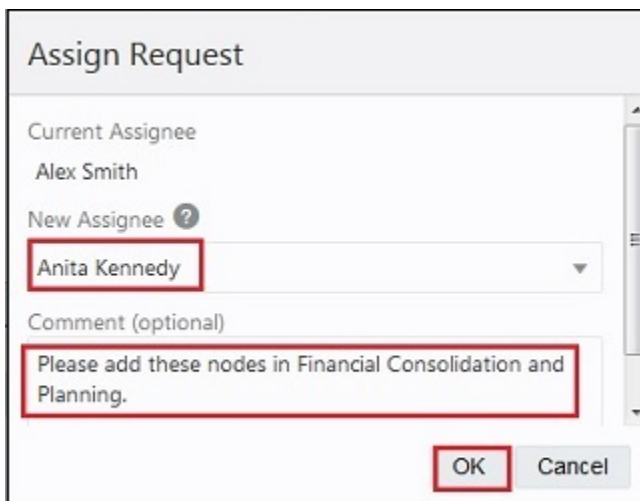
The two nodes that Alex added to the General Ledger application also need to be added to the Financial Consolidation and Planning applications. Since Alex does not have permission to access the dimensions in the Financial Consolidation and Planning

viewpoints, he assigns the request to Anita, who will continue working on the request and then submit it for approval.

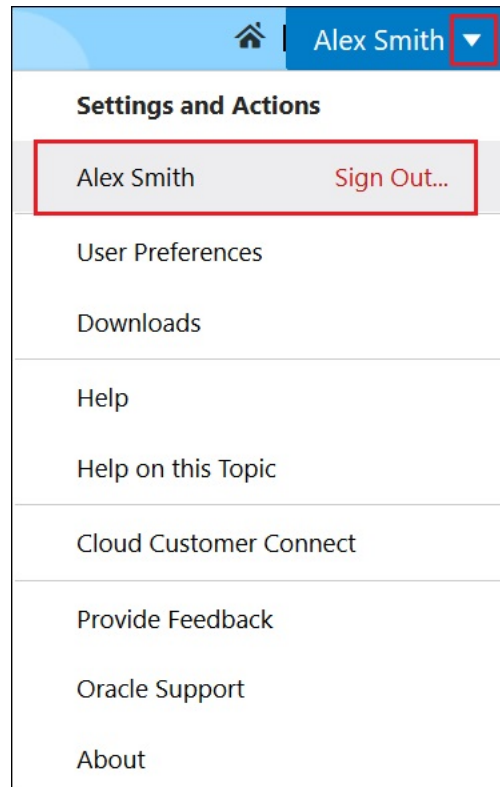
1. With the Entity Maintenance request still displayed, click **Actions**, and then select **Assign**.



2. In the Assign Request dialog box, select **Anita Kennedy** as the assignee, enter "Please add these nodes in Financial Consolidation and Planning" as the comment, and then click **OK**.



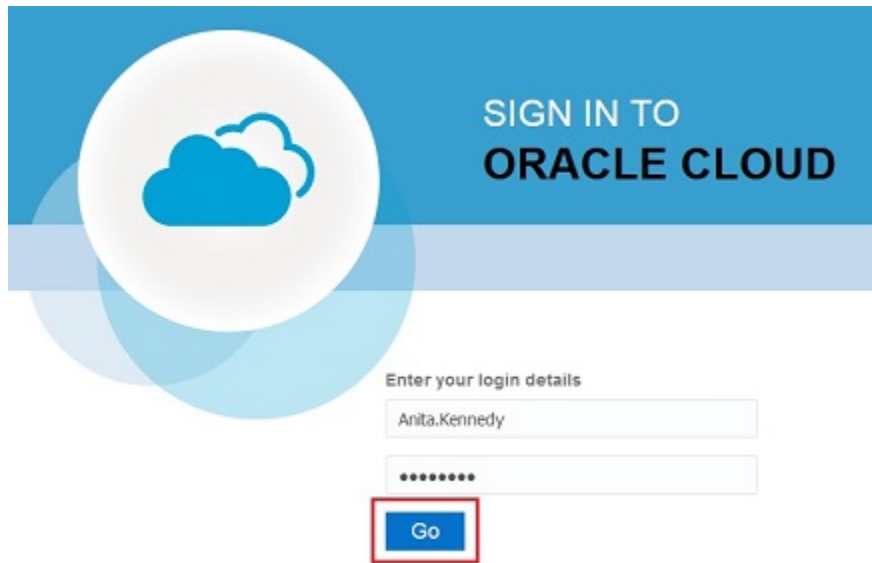
3. Click **Done** and then **Close** to return to the Enterprise Data Management Cloud home page.
4. At this point, Alex has completed the steps to create and assign a request, so he can sign out. Click the arrow next to **Alex Smith** at the top right of the screen, and then select **Sign Out**.



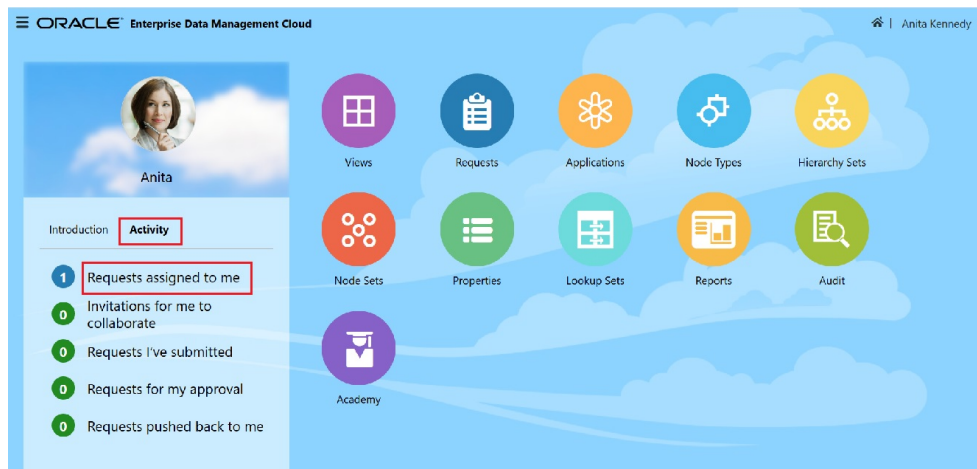
Collaborate on a Request

Since Alex only has permission to access the dimensions in the General Ledger viewpoint, he assigned the request to Anita, who now needs to add the two nodes to the dimensions in the Financial Consolidation and Planning viewpoints. Anita can add the nodes because she has permissions to the dimensions in all three viewpoints (General Ledger, Financial Consolidation, and Planning). Anita will receive an email notification asking her to update the request.

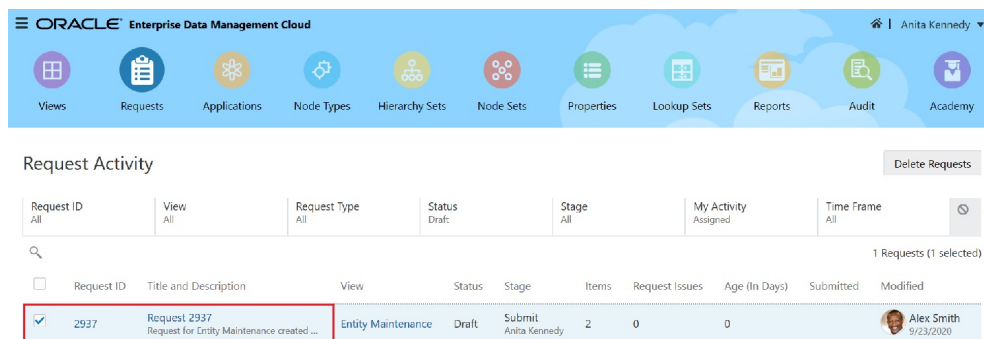
1. On the Oracle Cloud Sign In screen, sign in as Anita Kennedy.



2. Select **Activity**. Notice that Anita has one request assigned to her. This is the request assigned by Alex. Click **Requests assigned to me** to view the request.



3. Select the request, and then click the request to open it.



Notice that the additions that Alex made are highlighted in the General Ledger viewpoint. Anita can click



to view the comments Alex made about the request, and she can click



to view the attachment.

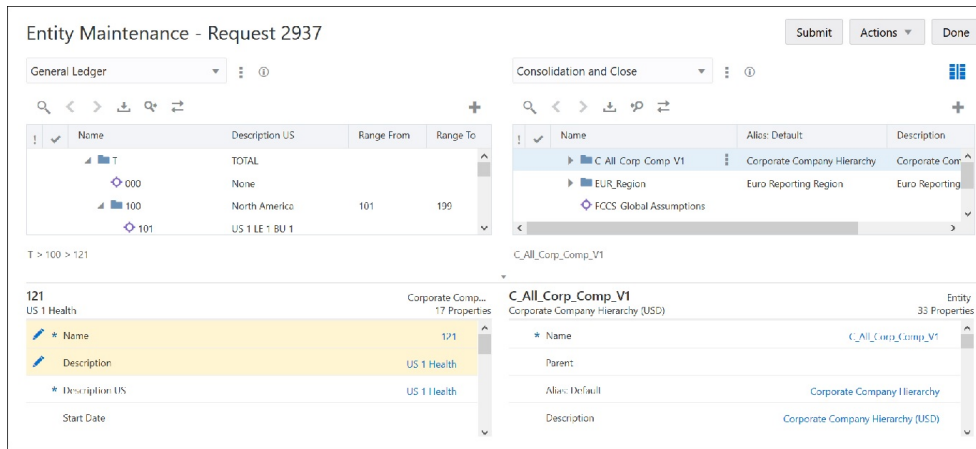
The screenshot shows the Oracle Enterprise Data Management Cloud interface. On the left, a sidebar for 'Request 2937' shows it is a 'Draft' and 'Interactive' request for 'Entity Maintenance' created by Alex Smith. It includes a 'Comments' section with two entries from Alex Smith: one assigning the request to Anita and another adding nodes 121 and 141. On the right, the 'Entity Maintenance' table is displayed with three viewpoints: 'General Ledger', 'Consolidation and Close', and 'Planning'. The 'General Ledger' viewpoint is active, showing a table with columns for Name, Description US, Range From, and Range To. Nodes 121 and 141 are highlighted in blue and green respectively, indicating they were added recently.

Name	Description US	Range From	Range To
101	US 1 LE 1 BU 1		
102	US 1 LE 2		
103	Revenue Management		
110	US1 LE1 2nd PBSV		
120	Supremo Fitness		
121	US 1 Health		
131	US 2 Health		
141	US 1 Support		
151	Canada		
200	LAD	201	299
300	EMEA	301	399

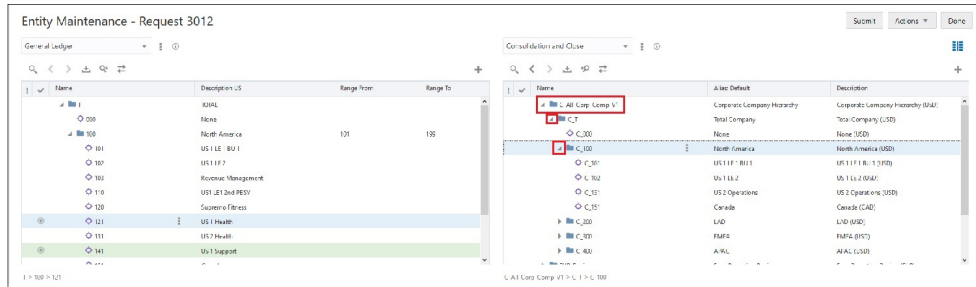
- Anita now must add the two nodes that Alex added to the General Ledger viewpoint to the Consolidation and Close and Planning viewpoints. Begin by comparing the General Ledger viewpoint with the Consolidation and Close

viewpoint. To do this, click the **Compare** icon at the top left of the screen.

After you click , the viewpoints are displayed side-by-side.

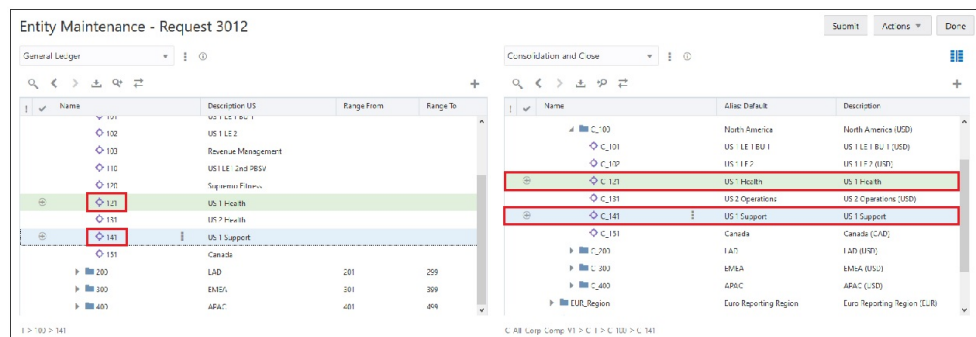


- In the **Consolidation and Close** viewpoint, expand the **C_All_Corp_Comp_V1** hierarchy down to the **C_100 North-America** node.



- In the **General Ledger** viewpoint, click on **121** and drag it over to **C_100** in the **Financial Consolidation** viewpoint. Make sure to drop the node on top of the **C_100** parent node. Do the same thing for **141**.

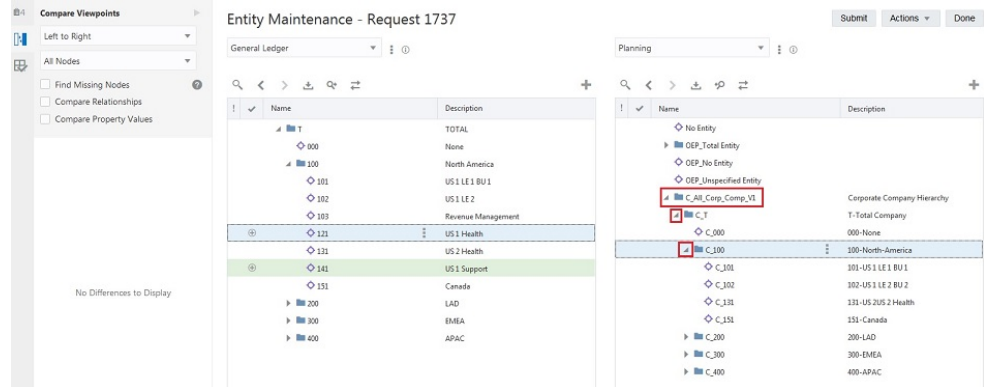
Note that you must place your cursor directly over the number in order to drag it to the new viewpoint.



- Click the arrow next to the **Consolidation and Close** viewpoint and select **Planning**.

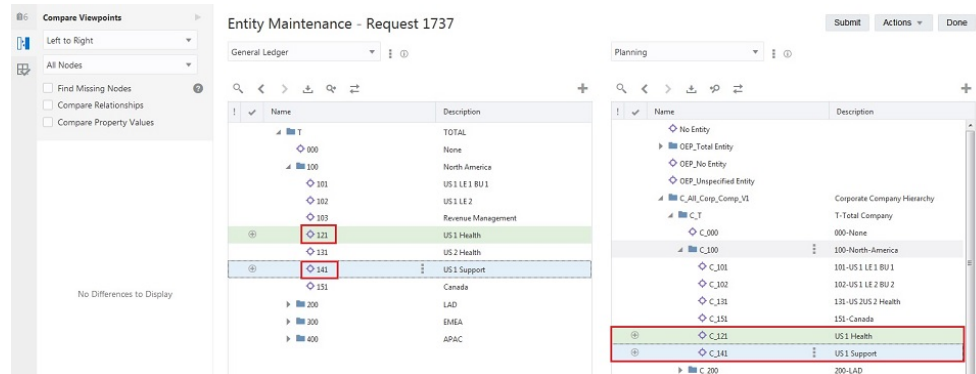


- In the **Planning** viewpoint, expand the **C_All_Corp_Comp_V1** hierarchy down to the **C_100 North-America** node.



- In the **General Ledger** viewpoint, click on **121** and drag it over to **C_100** in the **Planning** viewpoint. Do the same thing for **141**.

Note that you must place your cursor directly over the number in order to drag it to the new viewpoint.

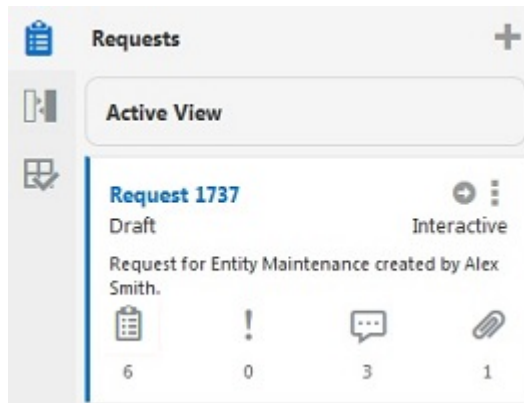


- Click the Requests



icon at the top left of the screen to review information about the request.

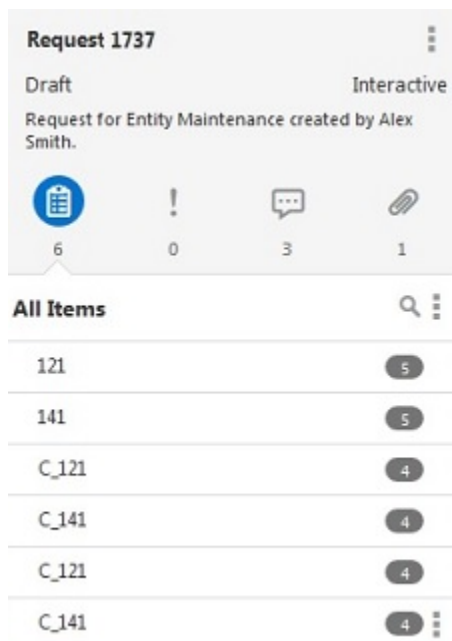
Notice that there are six request items, three comments, and one attachment.



11. Click the **Items**



icon to show request details.



12. Select each request item to see the details about the item. For example, if you select **121**, you can see that the request was created by Alex Smith for the General Ledger viewpoint, and it has one comment.


Request 1737

Draft Interactive

Request for Entity Maintenance created by Alex Smith.

6 0 3 1

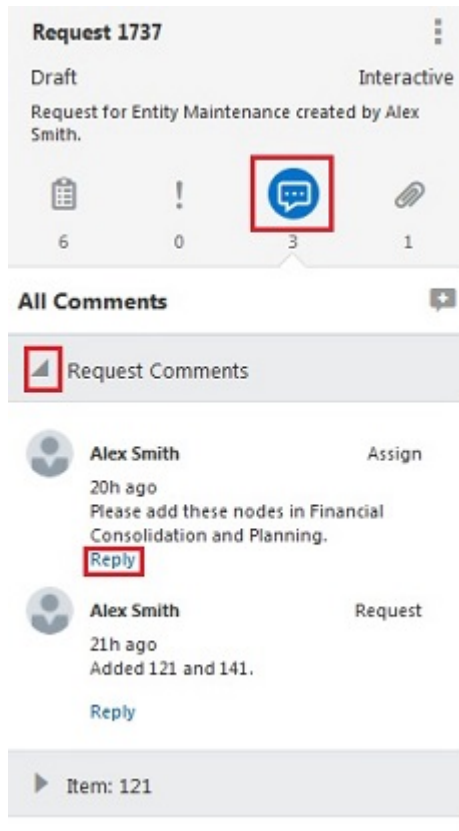
All Items

121	5
General Ledger	+
1 Comments	
 Alex Smith 21h ago Please add US1 Health	
Reply	
141	5
C_121	4
C_141	4
C_121	4
C_141	4

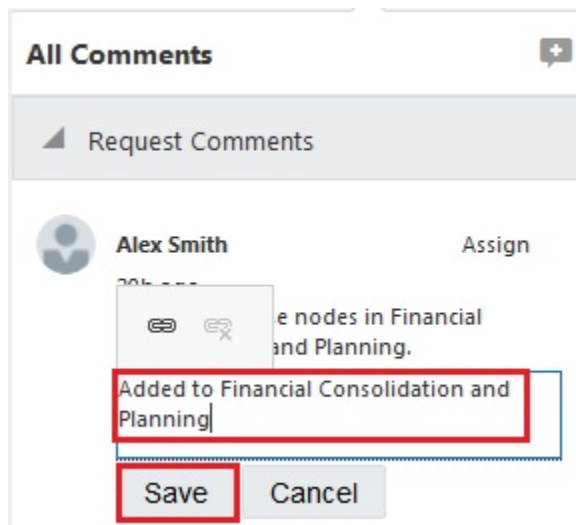
13. Click the **Comments**



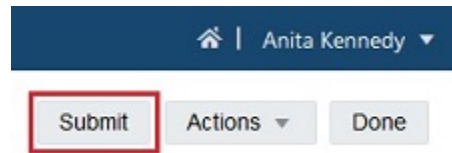
icon, then click the arrow next to **Request Comments**, and then click **Reply** to reply to Alex Smith.



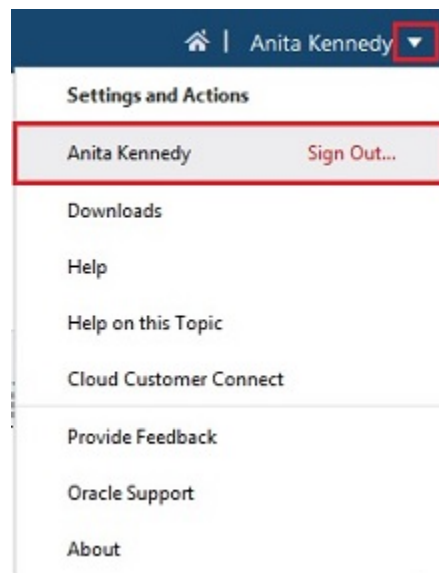
14. Enter "Added to Financial Consolidation and Planning", and then click **Save**.



15. Click **Submit** to submit the request.



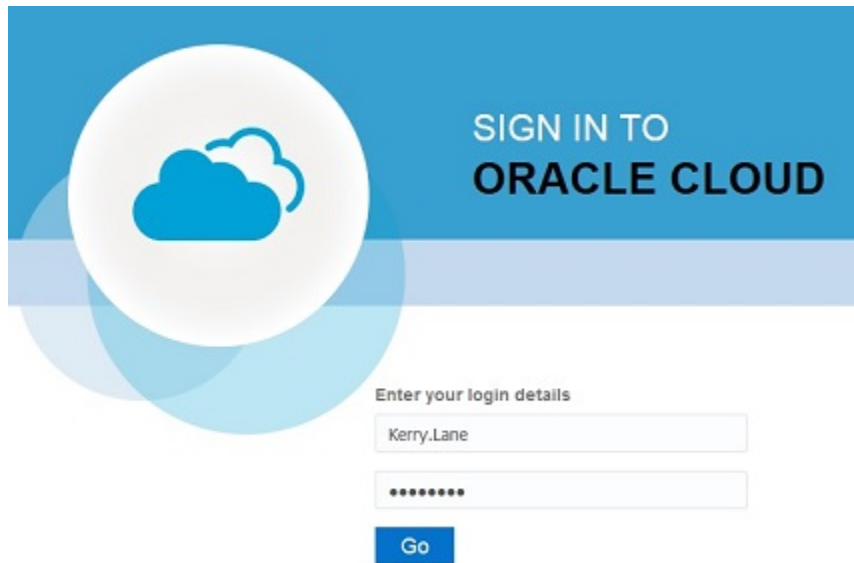
16. Click **Done** and then **Close** to return to the Enterprise Data Management Cloud home page.
17. At this point, Anita is done, so she can sign out. Click the arrow next to **Anita Kennedy** at the top right of the screen, and then select **Sign Out**.



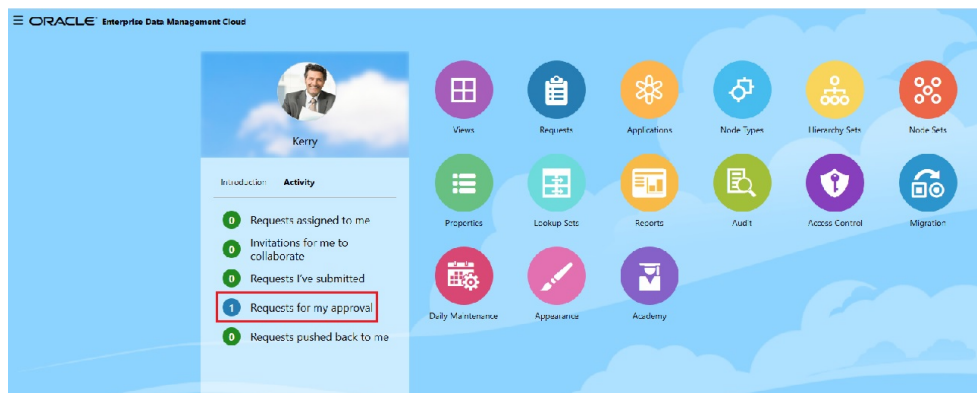
Approve a Request

In this step, Kerry Lane is going to approve the request to add two nodes to the General Ledger, Financial Consolidation, and Planning applications. Kerry has access to the dimensions in all three viewpoints (General Ledger, Financial Consolidation, and Planning). Kerry will receive an email notification asking him to approve the request.

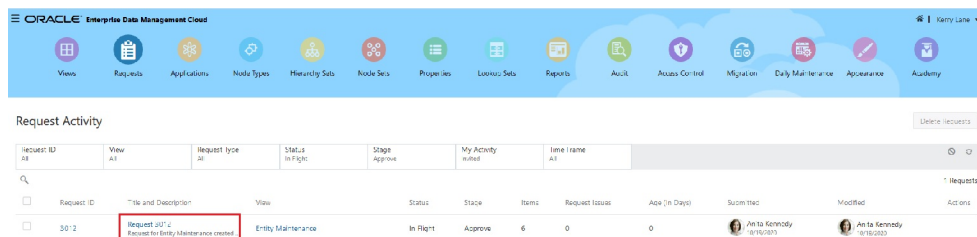
1. On the Oracle Cloud Sign In screen, log in as Kerry Lane.



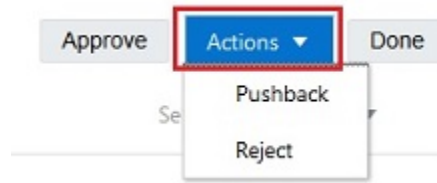
2. Select **Requests for my approval**.



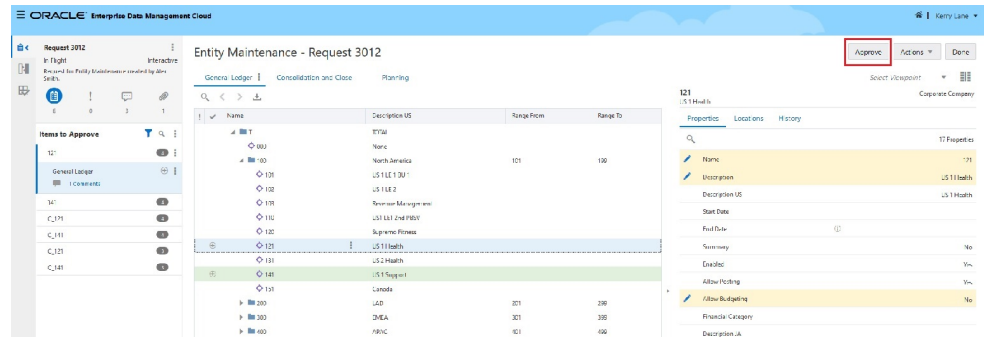
3. On the **Request Activity** screen, select the request.



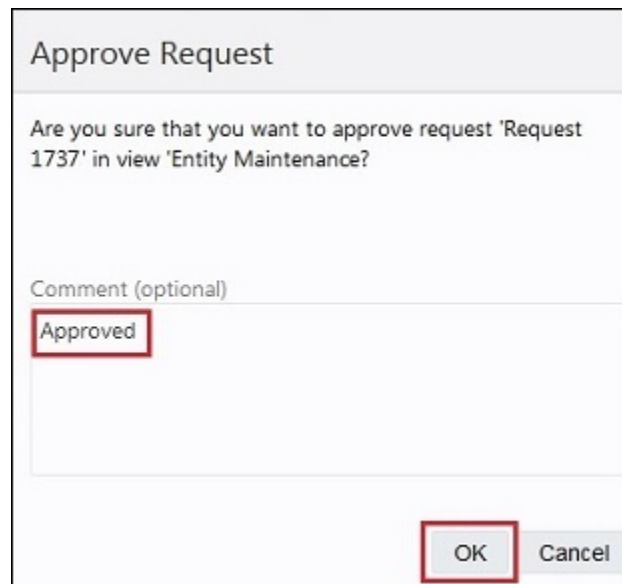
4. Click **Actions**. Notice that if you don't want to approve the request, you can either **Pushback** to the submitter, or you can **Reject** the request.



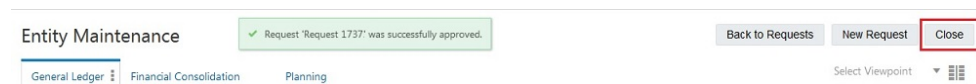
- In this example, click **Approve** to approve the request.



- In the **Approve Request** dialog box, enter **Approved**, and then click **OK**.



- Click **Done**, and then click **Close**.



- Sign out as Kerry Lane.

