

Oracle® Fusion Cloud EPM

Oracle Enterprise Performance Management Cloud Quick Start Checklists



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Oracle Fusion Cloud EPM Oracle Enterprise Performance Management Cloud Quick Start Checklists,
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1

Learn and Connect



Welcome Cloud Account Administrator!



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

Learn about EPM Cloud



1. Orient yourself with EPM Cloud business processes by perusing overviews available in [Overview of EPM Cloud](#) (4 mins)
2. Visit the [EPM Cloud libraries](#) on the Help Center to see videos, tutorials, documentation, and tools (5 mins)

Connect with EPM Cloud communities



- Join [Customer Connect](#), an online community, to collaborate and learn with colleagues. (10 minutes)
- Use the [Idea Lab](#) to influence Oracle's product development, share, vote, and comment on your favorite ideas.

Join User Groups to collaborate and learn more



Participating in user groups keeps you on the cutting edge of the EPM Cloud landscape. Join one of these user groups:

- Join [ODTUG](#) to stay on the cutting edge of the Oracle technology landscape
- Join [OATUG](#) to learn about Oracle applications and technology
- Join [UKOUG](#) to connect, learn, and collaborate with UK users and partners
- Join a [local User Group](#) to connect with users in your area
- Attend [Developer Events](#) to exchange ideas, network, and build communities

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.

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

The EPM CoE team:

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

How Do I Get Started?

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

Learn More

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

2

EPM Cloud Checklist for OCI GEN 2 Account Owners



Welcome Oracle Enterprise Performance Management Cloud Account Owner!

On purchasing an EPM Cloud subscription, Oracle sends you, the person designated as the initial contact (whose email ID was provided while ordering the subscription), an email that identifies the steps to activate and provision it. Use this checklist to take you through the steps involved in activating and provisioning your EPM Cloud subscription.



Activate Your First EPM Cloud Order



Read about [Activating an EPM Cloud Subscription \(First-time Customers on Oracle Cloud Infrastructure\)](#)

Being that you are a first time subscriber of Oracle Cloud, start by creating an Oracle Cloud Account, which is required to activate your order.

While creating this account, you perform these activities in **Oracle Cloud Activate My Services** page:

- Specify a unique Cloud Account Name, which will be used as the name for your identity domain. This name forms a part of the URL to access your EPM Cloud environments.
- Designate a user as a Cloud Account Administrator and Service Administrator for your EPM Cloud service. This user should be someone who is capable of creating EPM Cloud instances and provisioning users for them.

Oracle creates this user in the Identity Cloud and assigns Cloud Account Administrator role to the user. Oracle also sends an email to the user with the information needed to access My Services to complete the next stage of the process. This email, sent by `oraclecloudadmin_ww@oracle.com`, is titled **Action Required: Please Activate Your Services**.

This user is also assigned to the Service Administrator role in the environments after you create your EPM Cloud instances.



Instructions to activate your order [Instructions for First-time Customers](#) (5 minutes)

Working with a Reorder (Onboard Order)

If an Account Owner creates a new order for an additional EPM Cloud subscription, Oracle creates an Onboard Order, which allows the activation of the new instances within an existing Oracle Cloud account to share infrastructure components (Cloud Account Name, users and security) or the creation of the new instances under a new Oracle Cloud account for which you must set up users and security.

The Onboard Order email sent by `oraclecloudadmin_ww@oracle.com`, is titled **Action Required: Please Activate Your Services**.

You can activate an Onboard Order in its own Oracle Account or in an existing Oracle Account.

Activating an Onboard Order in a New Oracle Account

The process of activating an Onboard Order in a new Oracle Account is identical to that for activating a new order.



- Read about reorders: [Instructions for Reorders](#) (2 minutes)
- Instructions to activate and configure an Onboard Order in a new Oracle Account:
 - [Instructions for First-time Customers](#) (5 minutes)
 - [EPM Cloud Checklist for Cloud Account Administrators \(New Orders on OCI Gen 2\)](#) (40 minutes)

Working with a Classic EPM Cloud Order

For Classic orders, Oracle activates your subscription and creates environments. Oracle emails the URLs of the environments to the Account Owner, who can use the

following checklist to go through the steps involved in activating and provisioning the environments.



[EPM Cloud Checklist for Cloud Account Administrators \(New Classic Orders\) \(30 Minutes\)](#)

3

EPM Cloud Checklist for Cloud Account Administrators (New Orders on OCI Gen 2)



While activating an Oracle Enterprise Performance Management Cloud subscription, the Account Owner designated you as the Account Administrator as well as the Service Administrator for EPM Cloud services. Subsequently, you should have received an email from `oraclecloudadmin_ww@oracle.com` titled **Action Required: Please Activate Your Services**. This email contains the information you need to access the My Services as the Cloud Account Administrator to complete the next stage of the process.



Use this checklist to take you through the steps involved in activating and provisioning your subscription.

Create EPM Cloud Instance

When you create an instance, EPM Cloud automatically creates two environments.



Instructions for [Creating an EPM Cloud Instance](#) (4 minutes)

Create Identity Domain Administrators and Service Administrators

You can delegate setup and configuration activities to other Identity Domain Administrators and Service Administrators.



Instructions for [Creating Identity Domain Administrators and Service Administrators](#) (6 minutes)

Set up Single Sign-On (Optional)

Identity Domain Administrators set up SSO from the Oracle Cloud Identity Console.



- Read about [Federating with SAML 2.0 Identity Providers](#) (10 minutes)
- [Instructions for Federating an Identity Provider](#) (10 minutes)
- Instructions for [Configuring SSO with OCI EPM Cloud Using Azure AD as the Identity Provider](#) (20 minutes)
- Instructions for [Configuring Single Sign-On Between EPM Cloud and Oracle Fusion Cloud](#) (20 minutes)
- Instructions for [Configuring Single Sign-On Between EPM Cloud and NetSuite](#) (20 minutes)

Create Users and Assign Predefined EPM Cloud Roles

Identity Domain Administrators have many options (My Services, Oracle Cloud Identity Console, EPM Automate, and REST APIs) to create users and assign EPM Cloud predefined roles.



- Read about user and role management in EPM Cloud:
 - [About User and Role Management](#) (4 minutes)
 - [Understanding Predefined Roles](#) (4 minutes)
 - * [Planning and Planning Modules predefined roles](#) (2 minutes)
 - * [Financial Consolidation and Close predefined roles](#) (2 minutes)
 - * [Tax Reporting predefined roles](#) (2 minutes)
 - * [Profitability and Cost Management predefined roles](#) (2 minutes)

- * [Account Reconciliation predefined roles](#) (2 minutes)
- * [Oracle Enterprise Data Management Cloud predefined roles](#) (1 minutes)
- * [Narrative Reporting predefined roles](#) (1 minutes)
- Instructions to use My Services User Management screen to create and assign predefined roles to one user at a time: [Create Users and Assign Roles](#) (4 minutes)
- Instructions to use Identity Cloud Services Console to create users one at a time: [Create User Accounts](#) (3 minutes)
- Instructions to use Identity Cloud Services Console or My Services User Management screen to create a batch of users by importing from a Comma Separated Value file: [Import User Accounts](#) (5 minutes)
- Instructions to use EPM Automate to create batches of users and assign them roles.
 - Add a batch of users: [addUsers command](#) (5 minutes)
 - Assign a predefined role to a batch of users: [assignRole](#) command (5 minutes)
- Instructions to use REST APIs to create batches of users and assign them roles.
 - Add a batch of users: [Add Users to an Identity Domain](#) (5 minutes)
 - Assign a predefined role to a batch of users: [Assign Users to a Predefined Role or Application Role](#) command (5 minutes)

Set Notification Preferences (Optional)

Complete this step only if Oracle notifications for service incidents should be in a language other than English:



Read about [Setting Notification Preferences](#) (2 minutes)

Manage and Monitor EPM Cloud Account

Account Administrators use the Reports Dashboard of Identity Cloud Services Console to manage and monitor your Oracle Cloud account. Available reports are:

- System log that captures activity such as logins and user management actions.
- Notification delivery status for events such as new users and password changes.
- Login attempts to Identity Cloud Services.
- Users who did not log into Identity Cloud Services for a period.
- Application Access for users who log in to an environment
- Predefined roles granted to or revoked from users.



- [Understand the Type of Reports](#)
- [Run Reports](#)

Set up Network Restricted Access (Optional)

Use EPM Automate to set up an allowlist for your EPM Cloud instance.



Read about setting up IP allowlist using EPM Automate [ipAllowList](#) command (5 minutes).

Notify Users

A Service Administrator creates an EPM Cloud business process in an environment. When it is ready for use, broadcast the URL of the environment to users.

Set up OAuth2 for REST API and EPM Automate Access (Optional)

EPM Automate and REST APIs can use the OAuth 2.0 authentication protocol to access OCI (GEN 2) environments to execute commands, especially for automating the running of commands.



Read about setting up OAuth 2.0 [Authentication with OAuth 2 - Only for OCI \(Gen 2\) Environments](#) (5 minutes) in *REST API for Oracle Enterprise Performance Management Cloud*

Set up Automated Retrieval of Reports (Optional)

You can create and schedule scripts that use EPM Automate commands to automate a wide variety of administrative activities, including the downloading of the Activity Report and other audit reports.



Information sources in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud* :

- [Automating Activity Report Downloads to a Local Computer](#) (15 minutes)
- [Using the groupAssignmentAuditReport Command](#) (5 minutes)
- [Using the userAuditReport Command](#) (5 minutes)
- [Creating Audit Reports of Users Assigned to Roles](#) (15 minutes)
- [Creating Role Assignment and Revocation Audit Report](#) (15 minutes)

Set up Automatic Daily Backup Archival (Optional)

You can create and schedule scripts that use EPM Automate commands to automatically backup the daily maintenance snapshot of the environment to a local computer or to Oracle Object Storage.



Information sources in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud* :

- [Back up Application Snapshot to a Computer](#) (15 minutes)
- [Copying a Snapshot to or from Oracle Object Storage](#) (15 minutes)

Change the Maintenance Time (Optional)

Each EPM Cloud environment requires up to one hour every day to take a backup of the environment, install any updates, and create the Activity Report.



Read about Daily Maintenance:

- [Daily Maintenance Operations](#) (2 minutes)
- [Setting the Maintenance Start Time for an Environment](#) (1 minute)

4

EPM Cloud Checklist for Cloud Account Administrators (New Classic Orders)



While activating an Oracle Enterprise Performance Management Cloud subscription, the Account Owner designated you as the Account Administrator as well as the Service Administrator for EPM Cloud services. Subsequently, you should have received an email from `oraclecloudadmin_ww@oracle.com` titled **Action Required: Please Activate Your Services**. This email contains the information you need to access your My Account portal as the Cloud Account Administrator to complete the next stage of the process, which includes the following activities:

Use this checklist to take you through the steps involved in activating and provisioning your subscription.



Create Identity Domain Administrators

You can delegate setup and configuration activities by creating other Identity Domain Administrators who are capable of creating and provisioning EPM Cloud users.



Read instructions to use My Services Users screen to create a user and assign a role:

- [Create Users Using My Services \(Classic\)](#) (1 minute)
- [Assigning Roles Using My Services \(Classic\)](#) (1 minute)

Set up Single Sign-On (Optional)

Identity Domain Administrators set up SSO from My Services.



- Read about [Managing Oracle Single Sign-On](#) (10 minutes)
- Instructions for [Setting up Single Sign-on Using Oracle Identity Cloud Service as an Identity Provider \(for Classic EPM Cloud Only\)](#) (20 minutes)
- Instructions for [Configuring Single Sign-On Between EPM Cloud and Oracle Fusion Cloud](#) (20 minutes)
- Instructions for [Configuring Single Sign-On Between EPM Cloud and NetSuite](#) (20 minutes)

Create Users and Assign Predefined Roles

Identity Domain Administrators have many options (My Services, EPM Automate, and REST APIs) to create EPM Cloud users.



- Read about user management in EPM Cloud: [About User and Role Management](#) (4 minutes)
- Instructions to use My Services Users screen to create one user at a time: [Create Users Using My Services \(Classic\)](#) (1 minute)
- Instructions to use My Services to create a batch of users by importing from a Comma Separated Value file: [Import a Batch of User Accounts](#) (5 minutes)
- Instructions to use EPM Automate to create a batch of users: [addUsers command](#) (5 minutes)
- Instructions to use a REST API to create a batch of users: [Add Users to an Identity Domain](#)
- Instructions to use My Services to assign a role to a user: [Create Users Using My Services \(Classic\)](#) (1 minute)
- Instructions to use My Services to assign a role to many users: [Assign One Role to Many Users](#) (5 minute)
- Instructions to use EPM Automate to assign a role to a batch of users: [assignRole command](#) (5 minutes)
- Instructions to use a REST API to assign a role to a batch of users: [Assign Users to a Predefined Role or Application Role](#) (5 minutes)

Set up Network Restricted Access (Optional)

You can set up an allowlist for your EPM Cloud instance.



- Read about setting up network restricted access in EPM Cloud: [Setting up Secure Access](#) (2 minutes)
- Instructions to set up of IP allowlist: [Managing Internet Protocol Allowlist Rules](#)

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