Oracle® Fusion Cloud EPM

Narrative Reporting Quick Start Checklists

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Oracle Fusion Cloud EPM Narrative Reporting Quick Start Checklists,

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Primary Author: EPM Information Development Team

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Contents

Documentation Accessibility

Documentation Feedback

Part I Service Administrator

1 Learn and Connect Checklist for Narrative Reporting Service Administrators

2 Implement Narrative Reporting Checklist for Service Administrators

3 Administering Narrative Reporting Checklist for Service Administrators

Part II Power User

4 Learn and Connect Checklist for Narrative Reporting Power Users

5 Log In and Start Checklist for Narrative Reporting Power Users

Part III User

6 Learn and Connect Checklist for Narrative Reporting Users

7 Log In and Start Checklist for Narrative Reporting Users

Part IV Viewer

8 Learn and Connect Checklist for Narrative Reporting Viewers

9 Log In and Start Checklist for Narrative Reporting Viewers

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Documentation Feedback

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Part I
Service Administrator

Related Topics

- Learn and Connect Checklist for Narrative Reporting Service Administrators

Related Topics

- Implement Narrative Reporting Checklist for Service Administrators

Related Topics

- Administering Narrative Reporting Checklist for Service Administrators

1

Learn and Connect Checklist for Narrative Reporting Service Administrators

Welcome, Narrative Reporting Service Administrators!

Here's a checklist to help you learn about Narrative Reporting with links to training, reference materials and community resources.

Learn about Narrative Reporting

1. Orient yourself with Narrative Reporting by watching this video tour.

   Watch this video: Overview: Tour of Narrative Reporting in EPM Enterprise Cloud. (5 minutes)
2. Read this: Narrative Reporting Overview. (5 minutes)
3. Visit the Narrative Reporting library on the Help Center, your one-stop shop for videos, tutorials, documentation and tools. Narrative Reporting Help Center. (5 minutes)

Start using Narrative Reporting

1. Get familiar with the business process and how you'll start your Narrative Reporting activities. (25 minutes)

   Read this: Overview of Narrative Reporting. (5 minutes)

2. Review the basic Narrative Reporting steps that you'll perform. (60 minutes)
   - Read this: Learn about Report Packages (5 minutes)
     - Watch this video: Overview: Report Packages in Narrative Reporting Part I (5 minutes)
     - Watch this video: Overview: Report Package in Narrative Reporting Part II (5 minutes)
     - Watch this video: Report Package Basics Learning Path (5 minutes)
   - Read this: Create Report Packages (5 minutes)

     Watch this video: Creating the Report Package Structure in Narrative Reporting (5 minutes)
   - Read this: Manage Report Packages (5 minutes)

     Watch this video: Overview: Managing Report Packages in Narrative Reporting (5 minutes)
   - Read this: Working with Reports (5 minutes)

     Watch this video: Overview: Management Reports in EPM Cloud Narrative Reporting (5 minutes)
   - Read this: Working with Report Designer (5 minutes)
     - Watch this video: Creating Management Reports (5 minutes)
     - Watch this video: Designing Reports (5 minutes)
     - Watch this video: Viewing Reports (5 minutes)

See new features in each monthly update

1. Once you're up and running, read about the new features in each monthly update. (5 minutes)

   See What's New features

2. See all the Narrative Reporting features from previous monthly updates. (5 minutes)

   See Cloud Feature Tool

3. Read about new and upcoming features. Enterprise Performance Management Roadmap.

Connect with Narrative Reporting communities

Join Customer Connect, an online community, to collaborate and learn with colleagues. Review each of these areas: (10 minutes)

- Use the Narrative Reporting Category to ask questions, connect with experts, or share your thoughts on key topics.
- Use the Idea Lab to influence Oracle's product development, share, vote, and comment on your favorite ideas.
- Use the EPM Platform Category to pose questions, connect with experts, and share your thoughts and ideas.
- Attend Enterprise Performance Management Events to be among the first to know about new release functionality and industry best practices.

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Join a Narrative Reporting User Group to collaborate and learn more

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- Join UKOUG to connect, learn, and collaborate with UK users and partners.
- Join a local User Group to connect with users in your area.
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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.

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

Implement Narrative Reporting Checklist for Service Administrators

Welcome, Narrative Reporting Service Administrators!

Here's a checklist to help you step through your Narrative Reporting implementation, with links to documentation and other resources.

> **Note:**
>
> This checklist is meant to be a general guideline for tasks to be performed for a Narrative Reporting implementation. It is assumed that the Identity Domain Administrator has created users and granted predefined roles. There may be more or fewer tasks required for this role on Day 1, depending on the involvement of implementation partners, your organization's requirements, and the application design.

Review and bookmark the EPM Cloud Operations Guide

Open the Oracle Enterprise Performance Management Cloud Operations Guide and review and bookmark the Troubleshooting chapter for resolution information and the Requests chapter for optional updates.

Familiarize yourself with Narrative Reporting

1. Learn about Narrative Reporting

   Read this: Overview of Narrative Reporting (5 minutes)

   Read this: Which Tasks Should I Do First? (5 minutes)
2. Learn about Smart View

   Read this: Learning About Smart View (5 minutes)
3. Learn about the Library

   Read this: Learning About the Library (5 minutes)

   Watch this video: Learning About the Narrative Reporting Library (5 minutes)

Set preferences and install samples

1. **Optional:** Set your user preferences

   Read this: Using the Appearance Icon (5 minutes)

   Read this: Managing User Preferences (15 minutes)
2. Upload fonts

   Read this: Uploading Additional Fonts (5 minutes)
3. Install samples

   Read this: Installing Samples (5 minutes)

Setup user access

1. Grant application-specific roles and assign access permissions to users, groups, and Narrative Reporting artifacts.
2. Read this: Learn About Security (5 minutes)
3. Read this: Granting Access (15 minutes)

4. Watch this video: Granting Access to Library Artifacts (5 minutes)

Data Extract

1. Migrate artifacts

   Read this: Migrating Artifacts (15 minutes)

2. Learn about the EPM Automate

   Read this: About EPM Automate (5 minutes)

   Read this: Installing EPM Automate (5 minutes)

Perform tasks

The following tasks may be done in any order and are optional depending on your application requirements:

1. Review videos

   Watch this video: Administer Narrative Reporting (5 minutes)

2. Browse the Table of Contents in the Administering Narrative Reporting guide to see if other tasks are required for your implementation.

   Browse this: Administering Narrative Reporting (30 minutes)

Communicate with your users

When the application is ready for use, broadcast the URL of the environment to users.

Follow your company's process for communicating with users.

3

Administering Narrative Reporting Checklist for Service Administrators

Welcome, Narrative Reporting Service Administrators!

Here's a checklist to help you get going with the Narrative Reporting business process on Day 1 of your experience, with links to documentation and other resources.

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>
> This checklist is meant to be a general guideline for tasks to be performed on Day 1 after the Narrative Reporting application is ready to use. It is assumed that the Identity Domain Administrator has created users and granted predefined roles, and the Narrative Reporting business process has already been set up. There may be more or fewer tasks required for this role on Day 1, depending on what was already done during implementation, your organization's requirements, and the application design.

Review and bookmark the EPM Cloud Operations Guide

Open the Oracle Enterprise Performance Management Cloud Operations Guide and review and bookmark the Troubleshooting chapter for resolution information and the Requests chapter for optional updates.

Log in and setup

1. Make sure your browser meets the prerequisites

   Read this: Supported Browsers (10 minutes)
2. **Optional**: Enable localization of the user interface

   Read this: Understanding EPM Cloud Localization (10 minutes)
3. **Optional**: Enable accessibility mode

   Read this: Requirements for Screen Reading Technology (10 minutes)
4. **Optional**: Set up network restricted access

   Read this: Setting Up Restricted Network Access (15 minutes)

Install clients and configure

1. **Optional**: Install the EPM Automate utility to access environments over a command window to automate business activities.

   Read this: Installing EPM Automate (10 minutes)
2. Install available clients as needed, such as:
   - Smart View (may already be installed)
   - Product-specific extensions

   Read this: Downloading and Installing Clients (15 minutes)
3. Get familiar with the daily maintenance snapshot and set the time that maintenance is performed.

   Read this: Overview of the Maintenance Snapshot (15 minutes)

   Read this: For Narrative Reporting Only
4. Learn how to back up the maintenance snapshot each day.

   Read this: Backing Up the Maintenance Snapshot (15 minutes)

   Read this: For Narrative Reporting Only (4 minutes)

Set preferences and Connections

1. **Optional**: Set your user preferences.

   Read this: Managing User Preferences (15 minutes)
2. Direct connection to an Oracle EPM Cloud data source.

   Read this: Working with Connections and Remote Libraries (3 minutes)

   Read this: Working with Reporting Artifacts in Remote Libraries (4 minutes)

   Read this: Creating and Editing Connections (15 minutes)

Part II
Power User

Related Topics

- Learn and Connect Checklist for Narrative Reporting Power Users

Related Topics

- Log In and Start Checklist for Narrative Reporting Power Users

4

Learn and Connect Checklist for Narrative Reporting Power Users

Welcome, Narrative Reporting Power Users!

Here's a checklist to help you learn about Narrative Reporting with links to training, reference materials and community resources.

Learn about Narrative Reporting

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2. Read this: Narrative Reporting Overview. (5 minutes)
3. Visit the Narrative Reporting library on the Help Center, your one-stop shop for videos, tutorials, documentation and tools. Narrative Reporting Help Center. (5 minutes)

Start using Narrative Reporting

1. Get familiar with the business process and how you'll start your Narrative Reporting activities. (25 minutes)

   Read this: Overview of Narrative Reporting. (5 minutes)

2. Review the basic Narrative Reporting steps that you'll perform. (60 minutes)
   - Read this: Learn about Report Packages (4 minutes)
     - Watch this video: Overview: Report Packages in Narrative Reporting Part I (5 minutes)
     - Watch this video: Overview: Report Package in Narrative Reporting Part II (4 minutes)
     - Watch this video: Report Package Basics Learning Path (10 minutes)
   - Read this: Create Report Packages (5 minutes)

     Watch this video: Creating the Report Package Structure in Narrative Reporting (5 minutes)
   - Read this: Manage Report Packages (5 minutes)

     Watch this video: Overview: Managing Report Packages in Narrative Reporting (5 minutes)
   - Read this: Working with Reports (5 minutes)

     Watch this video: Overview: Management Reports in EPM Cloud Narrative Reporting (5 minutes)
   - Read this: Working with Report Designer (5 minutes)
     - Watch this video: Creating Management Reports (5 minutes)
     - Watch this video: Designing Reports (5 minutes)
     - Watch this video: Viewing Reports (5 minutes)

See new features in each monthly update

1. Once you're up and running, read about the new features in each monthly update. (5 minutes)

   See What's New features

2. See all the Narrative Reporting features from previous monthly updates. (5 minutes)

   See Cloud Feature Tool

3. Read about new and upcoming features.

   See Enterprise Performance Management Roadmap.

Connect with Narrative Reporting communities

Join Customer Connect, an online community, to collaborate and learn with colleagues. Review each of these areas: (10 minutes)

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- Use the Idea Lab to influence Oracle's product development, share, vote, and comment on your favorite ideas.
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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).

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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
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- See the business benefits and value proposition of an EPM CoE in *Creating and Running an EPM Center of Excellence*.

5

Log In and Start Checklist for Narrative Reporting Power Users

Welcome, Narrative Reporting Power Users!

Here's a checklist to help you get going with Narrative Reporting on Day 1 of your experience, with links to documentation and other resources.

> **Note:**
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> This checklist is meant to be a general guideline for tasks to be performed on Day 1 after the Narrative Reporting application is ready to use. It is assumed that the Narrative Reporting business process has already been set up. There may be more or fewer tasks required for this role on Day 1, depending on your organization's requirements, the application design, and the application roles you have been assigned.

Install clients and configure

1. Make sure your browser meets the prerequisites.

   Read this: Setting Up Browsers for EPM Cloud (10 minutes)

2. **Optional**: Install EPM Automate to remotely perform tasks within EPM Cloud environments.

Read this: Downloading and Installing Clients (10 minutes)

3. **Optional:** Install available clients as needed, such as:
   - Smart View (may already be installed)
   - Product-specific extensions

     Read this: Available Clients and Utilities (10 minutes)

Log in and setup

1. Log in to Narrative Reporting.

   Read this: Access EPM Cloud (10 minutes)
2. Navigate around the Home page.

   Read this: Overview of the Home Page (5 minutes)
3. Get ready to work in Narrative Reporting, such as setting preferences.

   Read this: Managing User Preferences (15 minutes)

Start using Narrative Reporting

1. Learn to create and manage Report Packages.
   - Read this: Report Package Design Considerations (5 minutes)
   - Read this: Create Report Packages (5 minutes)
   - Watch this video: Creating the Report Package Structure in Narrative Reporting (5 minutes)
   - Read this: Manage Report Packages (5 minutes)
   - Watch this video: Overview: Managing Report Packages in Narrative Reporting (5 minutes)
   - Read this: Work with the Sample Report Package (5 minutes)
2. Learn how to create folders using the Narrative Reporting Library.
   - Read this: Learning About the Library (5 minutes)
   - Watch this video: Learning About the Narrative Reporting Library (5 minutes)
3. Learn how to use Reports, Books, Bursting, and Notes.
   - Read this: Working with Reports (5 minutes)

- Watch this video: Overview: Reports in EPM Cloud Narrative Reporting (5 minutes)
- Read this: Working with Books (5 minutes)
- Watch this video: Overview: Managing Books in Narrative Reporting (5 minutes)
- Read this: Working with Bursting (5 minutes)
- Watch this video: Creating Bursting Definitions (5 minutes)
- Read this: Working with Notes (5 minutes)

4. Learn how to use Grids, Charts, Textboxes, Functions, and Formulas.
   - Read this: About grids (5 minutes)
   - Read this: Use the formula bar (5 minutes)
   - Read this: Work with functions (5 minutes)
   - Read this: Work with text boxes (5 minutes)
   - Read this: Work with charts (5 minutes)
   - Watch this video: Creating Charts (5 minutes)
   - Read this: Work with images (5 minutes)

Part III
User

Related Topics

- Learn and Connect Checklist for Narrative Reporting Users

Related Topics

- Log In and Start Checklist for Narrative Reporting Users

6

Learn and Connect Checklist for Narrative Reporting Users

Welcome to Narrative Reporting Users!

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2. Read this: Narrative Reporting Overview. (5 minutes)
3. Visit the Narrative Reporting library on the Help Center, your one-stop shop for videos, tutorials, documentation and tools. Narrative Reporting Help Center. (5 minutes)

Start using Narrative Reporting

1. Get familiar with the business process and how you'll start your Narrative Reporting activities. (25 minutes)

   Read this: Overview of Narrative Reporting. (5 minutes)

2. Review the basic Narrative Reporting steps that you'll perform. (60 minutes)
   - Read this: Learn about report packages (5 minutes)
     - Watch this video: Overview: Report Packages in Narrative Reporting Part I (5 minutes)
     - Watch this video: Overview: Report Package in Narrative Reporting Part II (4 minutes)
     - Watch this video: Report Package Basics Learning Path (5 minutes)
   - Read this: Working with Reports (5 minutes)
     - Watch this video: Overview: Management Reports in EPM Cloud Narrative Reporting (5 minutes)
     - Watch this video: Viewing Reports (5 minutes)

See new features in each monthly update

1. Once you're up and running, read about the new features in each monthly update. (5 minutes)

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> **Note:**
>
> Some of this content may not be appropriate for your role (that is, for the activities you'll be doing in Narrative Reporting). If you're unsure about your role, talk to your service administrator. This checklist is meant to be a general guideline for tasks to be performed on Day 1 after the Narrative Reporting application is ready to use. It is assumed that the Narrative Reporting business process has already been set up. There may be more or fewer tasks required for this role on Day 1, depending on your organization's requirements, the application design, and the application roles you have been assigned.

Install clients and configure

1. Make sure your browser meets the prerequisites.

   Read this: Setting Up Browsers for EPM Cloud (10 minutes)

2. **Optional:** Install available clients as needed, such as:
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Log in and setup

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   Read this: Access EPM Cloud (10 minutes)
2. Navigate around the Home page.

   Read this: Overview of the Home Page (10 minutes)
3. Get ready to work in Narrative Reporting, such as setting preferences.

   Read this: Managing User Preferences (10 minutes)
4. Learn about Smart View.

   Read this: Learn About Smart View (5 minutes)

Start using Narrative Reporting

1. Learn to create and manage Report Packages.
   - Read this: Overview of Report Packages (5 minutes)
   - Read this: Authoring and Approving Doclets (5 minutes)
   - Watch this video: Authoring and Approving Doclets in Narrative Reporting (5 minutes)
   - Read this: Review and Sign Off on Report Packages (5 minutes)
   - Watch this video: Reviewing Report Package Content (5 minutes)
2. Learn how to use Reports.
   - Read this: Learning About Reports (5 minutes)
   - Watch this video: Reports in EPM Cloud Narrative Reporting (5 minutes)
   - Read this: Viewing Reports (5 minutes)
   - Watch this video: Viewing and Interacting with Reports (5 minutes)
   - Read this: Working with Reports in Smart View (5 minutes)

- Read this: Viewing and Interacting with Books (5 minutes)

Part IV
Viewer

Related Topics

- Learn and Connect Checklist for Narrative Reporting Viewers

Related Topics

- Log In and Start Checklist for Narrative Reporting Viewers

8

Learn and Connect Checklist for Narrative Reporting Viewers

Welcome, Narrative Reporting Viewers!

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     - Watch this video: Viewing Reports (5 minutes)

See new features in each monthly update

1. Once you're up and running, read about the new features in each monthly update. (5 minutes)

   See What's New features

2. See all the Narrative Reporting features from previous monthly updates. (5 minutes)

   See Cloud Feature Tool

Connect with Narrative Reporting communities

Join Customer Connect, an online community, to collaborate and learn with colleagues. Review each of these areas: (10 minutes)

- Use the Narrative Reporting Category to ask questions, connect with experts, or share your thoughts on key topics.
- Use the Idea Lab to influence Oracle's product development, share, vote, and comment on your favorite ideas.

- Use the EPM Platform Category to pose questions, connect with experts, and share your thoughts and ideas.
- Attend Enterprise Performance Management Events to be among the first to know about new release functionality and industry best practices.

To ensure you are always in the know, confirm your Customer Connect notification preferences are set for EPM Announcements as well as each Category you're following.

1. To set notification preferences for EPM Announcements, go to **Categories**, then **Announcements**, and then **Enterprise Performance Management**. Next, select the **Notification preferences** drop down.
2. 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.

Join a Narrative Reporting User Group 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*.

9

Log In and Start Checklist for Narrative Reporting Viewers

Welcome, Narrative Reporting Viewers!

Here's a checklist to help you get going with Narrative Reporting on Day 1 of your experience, with links to documentation and other resources.

> **Note:**
>
> Some of this content may not be appropriate for your role (that is, for the activities you'll be doing in Narrative Reporting). If you're unsure about your role, talk to your service administrator. This checklist is meant to be a general guideline for tasks to be performed on Day 1 after the Narrative Reporting application is ready to use. It is assumed that the Narrative Reporting business process has already been set up. There may be more or fewer tasks required for this role on Day 1, depending on your organization's requirements, the application design, and the application roles you have been assigned.

Install clients and configure

Make sure your browser meets the prerequisites.

Read this: Setting Up Browsers for EPM Cloud (10 minutes)

Log in and setup

1. Log in to Narrative Reporting.

   Read this: Access EPM Cloud (10 minutes)
2. Navigate around the Home page.

   Read this: Overview of the Home Page (5 minutes)
3. Get ready to work in Narrative Reporting, such as setting preferences.

   Read this: Managing User Preferences (15 minutes)
4. Learn about Smart View.
   Read this: Learn About Smart View (5 minutes)

Start using Narrative Reporting

1. Learn how to use Report Packages.
   - Read this: Learn About Report Packages (15 minutes)
   - Watch this: Overview of Report Packages Part 1 (5 minutes)
   - Watch this: Overview of Report Packages Part 2 (4 minutes)
2. Learn how to use Reports, and Books.
   - Read this: Learning About Reports (15 minutes)
   - Watch this: Reports in EPM Cloud Narrative Reporting (5 minutes)
   - Read this: Viewing Reports (4 minutes)
   - Read this: Working with Reports in Smart View (5 minutes)
   - Read this: Viewing and Interacting with Books (5 minutes)