

Oracle® Fusion Cloud EPM

Enterprise Profitability and Cost Management Quick Start Checklists



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Oracle Fusion Cloud EPM Enterprise Profitability and Cost Management Quick Start Checklists,

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Primary Author: EPM Information Development Team

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Documentation Feedback

To provide feedback on this documentation, click the feedback button at the bottom of the page in any Oracle Help Center topic. You can also send email to epmdoc_ww@oracle.com.

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Service Administrator

Related Topics

- [Learn and Connect Checklist for Enterprise Profitability and Cost Management Service Administrators](#)
- [Administering Enterprise Profitability and Cost Management Checklist for Service Administrators](#)

Learn and Connect Checklist for Enterprise Profitability and Cost Management Service Administrators



Welcome Enterprise Profitability and Cost Management Service Administrators!



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

Learn about Enterprise Profitability and Cost Management



1. Orient yourself with Enterprise Profitability and Cost Management by watching this [video tour](#). (5 minutes)
2. Read an [Enterprise Profitability and Cost Management Overview](#) (3 min)
3. Visit the [Enterprise Profitability and Cost Management library](#) on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

Start using Enterprise Profitability and Cost Management



1. Review information about Enterprise Profitability and Cost Management applications and the [essential concepts](#) you must understand in order to model cost and revenue flows. (3 minutes)
2. Review how to create applications in Enterprise Profitability and Cost Management by watching this [overview video](#). (5 minutes)
3. Review the key concepts of modeling data in Enterprise Profitability and Cost Management by watching this [overview video](#). (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)
2. See all the [Enterprise Profitability and Cost Management features](#) from previous monthly updates. (5 minutes)

Connect with Profitability and Cost Management communities



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

- Use the [Profitability and Cost Management Forum](#) to ask questions, connect with experts, or share your thoughts on key topics in Enterprise Profitability and Cost Management.
- Use the [Idea Lab](#) to influence Oracle's product development, share, vote, and comment on your favorite ideas.
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Join a Profitability and Cost Management User Group to collaborate and learn more



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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?

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Administering Enterprise Profitability and Cost Management Checklist for Service Administrators



Welcome, Enterprise Profitability and Cost Management Service Administrators!



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

Note:

This checklist is meant to be a general guideline for tasks to be performed on Day 1. It is assumed that the Identity Domain Administrator has created users and granted predefined roles. The Enterprise Profitability and Cost Management business process has been created and you have the correct EPM Cloud URL (see [Sample EPM Cloud URLs](#)).

Create an application



1. Establish the goals, key objectives, and scope of your application.
Read this: [Application Design Best Practices](#) (5 min)
2. From the EPM Cloud Service Landing page, select **Profitability and Cost Management** and then **Enterprise Profitability and Cost Management**.
Read this: [Pre-configuring Your Environment](#) (2 mins)
3. Select what type of application to create.
Read this: [Selecting What Type of Application to Create](#) (2 mins)
4. Create either the sample application or a new application.
Read this: [Creating the Sample Application](#) (2 mins)
Read this: [Creating a New Application](#) (5 mins)

Create dimensions



Create dimensions to add to your Enterprise Profitability and Cost Management application.

Read this: [About Dimensions and Members in Enterprise Profitability and Cost Management](#) (5 min)

Read this: [Creating a Dimension](#) (5 min)

Load dimensions into the application



Load dimensions into your Enterprise Profitability and Cost Management application.

Read this: [Importing Metadata](#) (5 min)

Populate the application with data



After you load dimensions, you can populate the application with data from a data import file.

Read this: [Importing Data](#) (5 min)

Enable localization and accessibility



1. Enable localization of the user interface (optional).
Read this: [Understanding EPM Cloud Localization](#) (10 mins)
2. Activate accessibility features (optional).
Read this: [Activating Accessibility Features](#) (5 mins)

Install clients and configure



1. Make sure your browser meets the prerequisites.
Read this: [Supported Browsers](#) (3 mins)
Read this: [Setting Up Browsers for EPM Cloud](#) (5 mins)
2. Install the EPM Automate utility to access environments over a command window to automate business activities (optional).
Read this: [Installing EPM Automate](#) (5 mins)
3. Install available clients as needed, such as:
 - Oracle Smart View for Office (may already be installed)
 - Product-specific extensionsRead this: [Available Clients and Utilities](#) (5 mins)
Read this: [Downloading and Installing Clients](#) (5 mins)
4. Get familiar with the daily maintenance snapshot and set the time that maintenance is performed.
Read this: [Overview of the Maintenance Snapshot](#) (5 mins)
5. Learn how to back up the maintenance snapshot each day.
Read this: [Backing Up the Maintenance Snapshot](#) (5 mins)

Set up user access



Grant application-specific roles and assign access permissions to users, groups, and Enterprise Profitability and Cost Management artifacts.

Read these topics:

- [About Predefined Roles](#) (10 min)
- [About Application Roles](#) (3 min)
- [Working with Access Permissions](#) (10 min)

Set preferences and navigation



1. Set default preferences for Enterprise Profitability and Cost Management users and for many aspects of the application and the system, and create announcements for users.

Read this: [Managing Application and System Settings](#)

2. Connect to other Oracle Enterprise Performance Management Cloud environments to enable seamless navigation across business processes (optional).

Read this: [Connecting Environments in EPM Cloud](#)

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.

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Power User

Related Topics

- [Learn and Connect Checklist for Enterprise Profitability and Cost Management Power Users](#)
- [Log in and Start Checklist for Enterprise Profitability and Cost Management Power Users](#)

Learn and Connect Checklist for Enterprise Profitability and Cost Management Power Users



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3. Review the key concepts of modeling data in Enterprise Profitability and Cost Management by watching this [overview video](#). (5 minutes)

See new features in each monthly update



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Log in and Start Checklist for Enterprise Profitability and Cost Management Power Users



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Note:

This checklist is meant to be a general guideline for tasks to be performed on Day 1 after the Enterprise Profitability and Cost Management application is ready to use. It is assumed that the Enterprise Profitability and Cost Management business process, application, and dimensions have 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: [Supported Browsers](#) (3 mins)
Read this: [Setting Up Browsers for EPM Cloud](#) (5 mins)
2. Optional. Install the EPM Automate utility to remotely perform tasks within EPM Cloud environments.
Read this: [Installing EPM Automate](#) (5 min)
3. Install available clients as needed, such as:
 - Oracle Smart View for Office (may already be installed)
 - Product-specific extensionsRead this: [Available Clients and Utilities](#) (5 mins)
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Login and setup



1. With the URL for the system provided by your administrator, access Oracle Enterprise Performance Management Cloud.
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2. Navigate around the EPM Cloud Home page and the Enterprise Profitability and Cost Management Home page.
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3. Connect to Smart View.
Read these topics:
 - [Connections](#) (3 min)
 - [Creating Shared Connections](#) (10 min)
 - [Creating Private Connections](#) (10 min)Watch this overview video: [Leveraging EPM Cloud and On-Premise Data Using Smart View Connections](#) (5 min)

Start using Enterprise Profitability and Cost Management



1. Create models.

Read this: [About Models](#) (2 min)

Read this: [Creating a Model](#) (3 min)

Watch this video: [Models and Modeling in Enterprise Profitability and Cost Management](#) (5 min)

2. Create rules.

Read this: [Creating and Managing Rules](#) (10 min)

3. Validate models.

Read this: [About Model Validation](#) (2 minutes)

Read this: [Validating Models](#) (3 minutes)

4. Calculate models.

Read this: [Calculating Models](#) (10 min)

5. Analyze your calculations.

Read this: [About Calculation Analysis](#) (5 minutes)

6. Validate results.

Read this: [Viewing Rule Balancing Reports](#) (5 min)

3 User

Related Topics

- [Learn and Connect Checklist for Enterprise Profitability and Cost Management Users](#)
- [Log in and Start Checklist for Enterprise Profitability and Cost Management Users](#)

Learn and Connect Checklist for Enterprise Profitability and Cost Management Users



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Start using Enterprise Profitability and Cost Management



View and analyze your Enterprise Profitability and Cost Management data using dashboards and reports.

1. Familiarize yourself with the available analysis tools.
Watch this video: [Analyze Data in Enterprise Profitability and Cost Management](#) (5 min)
2. Create reports.
Read this: [Working with Reports](#) (5 min)
3. Create dashboards.
Read this: [Designing Dashboards](#) (5 min)
4. View key information with infolets.
Read this: [Viewing Key Information with Infolets](#) (5 min)
5. Analyze your data.
Read this: [Using Ad Hoc Grids for Data Entry and Analysis](#) (5 min)
6. Create profit curves.
Read this: [Working with Profit Curves](#) (5 min)
7. Trace allocations.
Read this: [Tracing Allocations](#) (5 min)

4

Viewer

Related Topics

- [Learn and Connect Checklist for Enterprise Profitability and Cost Management Viewers](#)
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Start using Enterprise Profitability and Cost Management



View and analyze your Enterprise Profitability and Cost Management data using dashboards and reports.

1. Familiarize yourself with the available analysis tools.

Watch this video: [Analyze Data in Enterprise Profitability and Cost Management](#) (5 min)

2. Create reports.

Read this: [Working with Reports](#) (5 min)

3. Create dashboards.

Read this: [Designing Dashboards](#) (5 min)

4. View key information with infolets.

Read this: [Viewing Key Information with Infolets](#) (5 min)

5. Analyze your data.

Read this: [Using Ad Hoc Grids for Data Entry and Analysis](#) (5 min)

6. Create profit curves.

Read this: [Working with Profit Curves](#) (5 min)

7. Trace allocations.

Read this: [Tracing Allocations](#) (5 min)