Oracle® Fusion Cloud EPM

Financial Consolidation and Close Quick Start Checklists

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Oracle Fusion Cloud EPM Financial Consolidation and Close Quick Start Checklists,

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Contents

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Part I
Service Administrator

Related Topics

- Learn and Connect Checklist for Financial Consolidation and Close Service Administrators

Related Topics

- Implement Financial Consolidation and Close Checklist for Service Administrators

Related Topics

- Administering Financial Consolidation and Close Checklist for Service Administrators

1

Learn and Connect Checklist for Financial Consolidation and Close Service Administrators

Welcome, Financial Consolidation and Close Service Administrators!

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

Learn about Financial Consolidation and Close

1. Orient yourself with Financial Consolidation and Close by watching this video tour. (8 minutes)

   Watch Overview: Tour of Financial Consolidation and Close in EPM Enterprise Cloud. (5 minutes)

2. Read a Financial Consolidation and Close Overview. (5 minutes)
3. Visit the Financial Consolidation and Close library on the Help Center, your one-stop shop for videos, tutorials, documentation and tools. Financial Consolidation and Close Help Center.

Start using Financial Consolidation and Close

1. Review the basic consolidation and close steps. (50 minutes)
   - Workflow for Creating an Application
   - Consolidation Process
   - Data Flow
   - Consolidation Process Flow
   - Translation Process
   - Financial Consolidation and Close Learning Path
   - Understanding the Consolidation Process in Financial Consolidation and Close
2. Get familiar with the application interface and how you'll start your Financial Consolidation and Close activities. (25 minutes)

   Read a Overview of the Home Page and Navigation

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 Financial Consolidation and Close features from previous monthly updates. (5 minutes)

   See Cloud Feature Tool
3. Read about new and upcoming features. Financial Consolidation and Close Roadmap

Connect with Financial Consolidation and Close communities

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

- Use the Financial Consolidation and Close 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.
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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
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- Leads EPM-related change management initiatives and drives transformation

How Do I Get Started?

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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*.

2

Implement Financial Consolidation and Close Checklist for Service Administrators

Welcome, Financial Consolidation and Close Service Administrators!

Here's a checklist to help you step through your Financial Consolidation and Close 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 Financial Consolidation and Close 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

1. 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.

2. Read this: Enrolling in the Implementation Success Program (20 minutes)

Create an application

1. Establish the goals, key objectives, and scope of your application

   Read this: Application Overview (15 mins)

   Read this: Workflow for Creating an Application (15 mins)

2. From the landing page, create a custom Financial Consolidation and Close application via the Application Creation wizard (includes setting up start/end year, frequency, currency, customizing dimensions, and other settings)

   Read this: Creating an Application (15 mins)

   Read this: Application Design and Maintenance Best Practices (15 mins)

   Do this tutorial: Configuring Financial Consolidation and Close

Set preferences, and dimensions

1. Set default preferences for Financial Consolidation and Close users and many aspects of the application and the system, and create announcements for users

   Read this: Specifying Application Settings (15 mins)

2. Set up dimensions

   Read this: Working with Dimensions (15 mins)

   Read this: Editing Dimensions in the Simplified Dimension Editor (15 mins)

   Watch this video: Dimensions Overview (3:45)

   Watch this video: Adding and Updating Metadata Using the Dimension Editor (4:29)

Set up user access

1. Grant application-specific roles and assign access permissions to users, groups, and Financial Consolidation and Close artifacts
2. Read this: Managing Artifact and Data Access (15 mins)
3. Watch this video overview: Understanding Security (2:33)

Load data and configure

1. Load data or Enter data

   Watch this video: Tips and Tricks for Understanding Data in Financial Consolidation and Close

   Read this: Importing Data (15 mins)

   Read this: Entering Data in Forms (15 mins)
2. Build effective and efficient business rules

   Read this: About Calculation Manager (20 mins)

   Read this: Working with Rules (15 mins)

   For Complex Ownership:

   - Read this: Advanced Consolidation Overview (15 mins)
   - Read this: Advanced Consolidation Rules (20 mins)
3. Create forms/dashboards/infolets for entering data

   Read this: Managing Forms (15 mins)
4. Learn how to optimize your application for the best possible performance

   Watch this video: Financial Consolidation and Close Performance Tuning

Perform tasks

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

1. Set up journals for users to enter data

   Read this: Managing Consolidation Journals (15 mins)

Watch this video: Getting Started with Journals (6:08)

2. Set up an approvals process for data

   Read this: Managing the Approval Process (15 mins)

   Watch this video: Setting Up the Approval Process (4:39)

3. Set up navigation flows to control how roles or groups interact with Financial Consolidation and Close

   Read this: Understanding Navigation Flows (15 mins)

4. Browse the Table of Contents in the *Administering Financial Consolidation and Close* guide to see if other tasks are required for your implementation

   See this: Administering Financial Consolidation and Close (30 mins)l

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 Financial Consolidation and Close Checklist for Service Administrators

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Log in and setup

1. Make sure your browser meets the prerequisites

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

   Read this: Understanding EPM Cloud Localization (10 mins)
3. Enable accessibility mode (optional)

   Read this: Requirements for Screen Reading Technology (10 mins)
4. Set up network restricted access (optional)

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

Install clients and configure

1. Install the EPM Automate utility to access environments over a command window to automate business activities (optional)

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

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

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

   Read this: Application Design and Maintenance Best Practices (15 mins)
4. Learn how to back up the maintenance snapshot each day

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

Set preferences and navigation

1. Set default preferences for Financial Consolidation and Close users and many aspects of the application and the system, and create announcements for users

   Read this: Setting Your Preferences (15 mins)

2. Connect to other EPM Cloud environments to enable seamless navigation across business processes (optional)

   Read this: Connecting Environments in EPM Cloud (15 mins)

   Watch this video: Define Navigation Flows to Integrate Business Processes (3:51)

Part II
Power User

Related Topics

- Learn and Connect Checklist for Financial Consolidation and Close Power Users

Related Topics

- Log In and Start Checklist for Financial Consolidation and Close Power Users

4

Learn and Connect Checklist for Financial Consolidation and Close Power Users

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5

Log In and Start Checklist for Financial Consolidation and Close Power Users

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

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Install clients and configure

1. Make sure your browser meets the prerequisites.

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

2. Install EPM Automate to remotely perform tasks within EPM Cloud environments (optional).

   Read this: Downloading and Installing Clients (10 mins)

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

   Read this:

   Available Clients and Utilities (10 mins)

Log in and setup

1. Log in to Financial Consolidation and Close.

   Read this: Access EPM Cloud (10 mins)

2. Navigate around the Home page.

   Read this: Understanding the Home Page (5 mins)

3. Get ready to work in Financial Consolidation and Close, such as setting preferences.

   Read this: Setting Your Preferences (15 mins)

Start using Financial Consolidation and Close

1. Start working with Financial Consolidation and Close forms and learn how to update data quickly.

   Read this: Entering Data in Forms (15 mins)

2. Learn the basics of working with your Financial Consolidation and Close data.

   Read this: Data Flow (15 mins)

Watch this video: Tips and Tricks for Understanding Data in Financial Consolidation and Close

3. Use dashboards and infolets to visualize and work with data.

   Read this: Monitoring Dashboards (10 mins)

   Read this: Viewing Key Information with Infolets (15 mins)

   Watch this video: Dashboards Overview (3:39)

4. View summaries of key data with reports and books.

   Read this: Working with Reports (20 mins)

5. Set up the approvals process for your business users.

   Read this: Managing the Approval Process (15 mins)

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6. Design and customize ad hoc grids for your business users or use ad hoc grids to quickly drill into data slices that are important to you.

   - Read this: Creating an Ad Hoc Grid (15 mins)
   - Read this: Using Ad Hoc for Data Entry and Analysis (15 mins)

7. View, analyze, and report on your Financial Consolidation and Close data using dashboards, infolets, and reports.

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Part III
User

Related Topics

- Learn and Connect Checklist for Financial Consolidation and Close Users

Related Topics

- Log In and Start Checklist for Financial Consolidation and Close Users

6

Learn and Connect Checklist for Financial Consolidation and Close Users

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Part IV
Viewer

Related Topics

- Learn and Connect Checklist for Financial Consolidation and Close Viewers

Related Topics

- Log In and Start Checklist for Financial Consolidation and Close Viewers

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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*.

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Log In and Start Checklist for Financial Consolidation and Close Viewers

Welcome, Financial Consolidation and Close Viewers!

Here's a checklist to help you get going with Financial Consolidation and Close 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 Financial Consolidation and Close). 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 Financial Consolidation and Close application is ready to use. It is assumed that the Financial Consolidation and Close business process, application, and data 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: Setting Up Browsers for EPM Cloud (10 mins)

2. Install EPM Automate to remotely perform tasks within EPM Cloud environments (optional).

   Read this: Downloading and Installing Clients (10 mins)

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

   Read this:

   Available Clients and Utilities (10 mins)

Log in and setup

1. Log in to Financial Consolidation and Close.

   Read this: Access EPM Cloud (10 mins)

2. Navigate around the Home page.

   Read this: Understanding the Home Page (5 mins)

3. Get ready to work in Financial Consolidation and Close, such as setting preferences.

   Read this: Setting Your Preferences (15 mins)

Start using Financial Consolidation and Close

1. Start working with Financial Consolidation and Close forms and learn how to update data quickly.

   Read this: Entering Data in Forms (15 mins)

2. Learn the basics of working with your Financial Consolidation and Close data.

   Read this: Data Flow (15 mins)

Watch this video: Tips and Tricks for Understanding Data in Financial Consolidation and Close

3. Use dashboards and infolets to visualize and work with data.

   Read this: Monitoring Dashboards (10 mins)

   Read this: Viewing Key Information with Infolets (15 mins)

   Watch this video: Dashboards Overview (3:39)

4. View summaries of key data with reports and books.

   Read this: Working with Reports (20 mins)

5. Set up the approvals process for your business users.

   Read this: Managing the Approval Process (15 mins)

   Watch this video: Setting Up the Approval Process (4:40)

6. Design and customize ad hoc grids for your business users or use ad hoc grids to quickly drill into data slices that are important to you.

   - Read this: Creating an Ad Hoc Grid (15 mins)
   - Read this: Using Ad Hoc for Data Entry and Analysis (15 mins)

7. View, analyze, and report on your Financial Consolidation and Close data using dashboards, infolets, and reports.

   - Read this: Monitoring Dashboards (15 mins)
   - Read this: Viewing Key Information with Infolets (15 mins)
   - Watch this video: Dashboards Overview (3:39)
   - Read this: Working with Reports (15 mins)