Oracle® Fusion Cloud EPM

FreeForm Quick Start Checklists

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Oracle Fusion Cloud EPM FreeForm Quick Start Checklists,

F56851-04

Contents

Part IV   Viewer

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Part I
Service Administrator

Related Topics

- Learn and Connect Checklist for FreeForm Service Administrators
- Implement FreeForm Checklist for Service Administrators
- Administering FreeForm Checklist for Service Administrators

1
Learn and Connect Checklist for FreeForm Service Administrators

Welcome, FreeForm Service Administrators!

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

Learn about FreeForm

1. Orient yourself with FreeForm by watching this video tour (4 mins)

2. Read a FreeForm overview (3 mins)

3. Get familiar with the application interface and how you'll start your FreeForm activities (5 mins)

4. Visit the FreeForm library on the Help Center to see videos, tutorials, documentation, and tools (5 mins)

See new features in each monthly update

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

2. See all the FreeForm features from previous monthly updates (5 mins)

Connect with FreeForm communities

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

- Use the FreeForm category to ask questions, connect with experts, or share your thoughts on key topics

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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
- 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 FreeForm Checklist for Service Administrators

Welcome, FreeForm Service Administrators!

Here's a checklist to help you step through your FreeForm 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 FreeForm 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.

Implement FreeForm

Sign up for the Implementation Success Program

The Implementation Success Program (ISP) is a service led by EPM Development for customers that uses a series of checkpoints during your implementation. The program

significantly increases the success rate of implementations by bringing in all EPM Development knowledge in an efficient way.

Read this and sign up: Enrolling in the Implementation Success Program (20 mins)

Review and bookmark the Oracle Enterprise Performance Management 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.

Create an application

1. Establish the goals, key objectives, and scope of your application.
   Watch this video: Analyzing Plans with FreeForm Planning Applications (4 mins)

2. FreeForm applications use an open dimensional cube construct allowing you to create cubes with any dimension combination you need.
   Read about:

   • Understanding FreeForm (3 mins)

   • FreeForm App Sources (3 mins)

   • Important Considerations for FreeForm Apps (5 mins)

   • Creating a FreeForm App (2 mins)

   Watch these videos to understand the different options:

   • Creating FreeForm Applications from On-Premises Essbase (4 mins)

   • Creating FreeForm Applications with a Hybrid BSO Cube (4 mins)

   • Creating FreeForm Applications with a Reporting/ASO Cube (4 mins)

   • Creating Multi-Cube FreeForm Applications from Essbase Outlines (4 mins)

   • Creating Multi-Cube FreeForm Applications from BSO and ASO Cubes (4 mins)

   • Creating Multi-Cube FreeForm Applications with an Excel Template - Part 1 (4 mins)

- • Creating Multi-Cube FreeForm Applications with an Excel Template - Part 2 (3 mins)
  - • Creating and Updating FreeForm Applications using Smart View (6 mins)

3. From the landing page, you can create a FreeForm application using one of the following options:

  - • Create a new application – Manually create a FreeForm application based on your own models using custom dimensions.
    Read this: Creating a FreeForm App Using the Application Creation Wizard (5 mins)

  - • Migrate – Create a FreeForm app from a snapshot that you previously uploaded to the environment.
    Read this: Creating a FreeForm App Using an Outline File or Snapshot (3 mins)

Import metadata, and set variables

1. Import metadata into the application.

   Read this:Importing Metadata (5 mins)

   Watch this video: Importing Metadata in Oracle Planning and Budgeting Cloud (5 mins)

2. Set up substitution variables.

   Read this:Creating and Assigning Values to Substitution Variables (3 mins)

Set up user access

Grant application-specific roles and assign access permissions to users, groups, and FreeForm artifacts.

Read about:

- • Managing Role Assignments at the Application Level (15 mins)

- • Setting Up Access Permissions (15 mins)

Do this tutorial: Setting Up Security in Planning (75 mins)

Watch this video overview: Understanding Security and Roles in Planning (2:24 mins)

Load data and configure

1. Load or enter data.

   Do these tutorials:

   • Entering Planning Data (15 mins)

   • Loading Data in Planning (60 mins)

   Watch this video: Entering and Saving Data in Planning(3:53 mins)

2. Build effective and efficient business rules.

   Read this: About Calculation Manager (20 mins)

   Watch this video: Building Effective and Efficient Calculations in Oracle Planning and Budgeting Cloud (10 mins)

3. Create forms, dashboards, and/or infolets for entering data.

   Read about:

   • Creating Simple Forms (15 mins)

   • Creating and Managing Dashboards (15 mins)

   • Designing Infolets (15 mins)

   Watch these videos:

   • Creating Dashboards (5 mins)

   • • Modifying Dashboards (5 mins)

   Do this tutorial: Designing Forms and Managing Task Lists in Planning (55 mins)

Design reports

Start designing your reports.

Read about

• Accessing the Report Designer (5 mins)

• Accessing Reporting Web Studio (2 mins)

Set up Smart View (Optional)

Read this: Smart View Checklist for Service Administrators (60 min).

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 FreeForm Checklist for Service Administrators

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Start Administering FreeForm

Review and bookmark the Oracle Enterprise Performance Management 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: Resolving Form Functional and Performance Issues (5 mins)

Log in and setup

1. Make sure your browser meets the prerequisites.

   Read this: Supported Browsers (15 mins)

2. Enable localization of the user interface (optional).

   Read this: Understanding EPM Cloud Localization (10 mins)

3. Enable accessibility mode (optional).

   Read this: Enabling Accessibility Features (10 mins)

4. Set up network restricted access (optional).

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

5. Authenticate and access the environment.

   Read this: Accessing EPM Cloud (10 mins) and Sample Connection URL (10 mins)

Install clients, connect, 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)

   Watch this video: How to use EPM Automate (4:46 mins)

2. Install available clients for FreeForm such as:

   • Smart View (may already be installed)

   • Product-specific extensions

   • Financial Reporting Web Studio

   Read this: Available Clients and Utilities (10 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)

4. Learn how to back up the maintenance snapshot each day.

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

Set preferences and navigation

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 mins)

Part II
Power User

Related Topics

- Learn and Connect Checklist for FreeForm Power Users
- Log In and Start Checklist for FreeForm Power Users

4
Learn and Connect Checklist for FreeForm Power Users

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Install clients and configure

1. Make sure your browser meets the prerequisites.

   Read this: Setting Up Browsers for EPM Cloud (15 mins)

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

   Read this: Downloading and Installing Clients (10 mins)

3. Install available clients for FreeForm as needed, such as:

   • Smart View (may already be installed)

   • Product-specific extensions

   • Financial Reporting Web Studio

   Read this: Available Clients and Utilities (10 mins)

Log in and setup

1. Log in to FreeForm.

   Read this: Accessing the EPM Cloud (10 mins)

2. Navigate around the Home page.

   Read this: Understanding the Home Page (5 mins)

3. Get ready to work in FreeForm, such as setting preferences.

   Read this: Preparing to Work in Planning (10 mins)

   Watch this video: Overview: Setting User Preferences in Planning (3 mins)

4. Set up Smart View (optional)

   Read this:Log In and Start Checklist for SmartView (20 mins)

Start using FreeForm

1. Start working with FreeForm forms and learn how to create and update plans quickly.

   Read this: Working in Forms (10 mins)

   Watch this video: Overview: Working with Data in Planning (3 mins)

2. Learn the basics of working with your FreeForm data.

   Read this: Basics of Working with Data (20 mins)

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

Read this: Using Dashboards to Work with Data (15 mins)

Read this: Viewing Key Information with Infolets (10 mins)

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

Read this: Working with Reports (20 mins)

5. Design and customize ad hoc grids for your business users.

Read this:Designing Ad Hoc Grids (20 mins)

Watch this video: Designing Ad Hoc Grids in Planning (3 mins)

Part III

User

Related Topics

- Learn and Connect Checklist for FreeForm Users
- Log In and Start Checklist for FreeForm Users

6
Learn and Connect Checklist for FreeForm Users

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Install clients and configure

1. Make sure your browser meets the prerequisites.

   Read this: Setting Up Browsers for EPM Cloud (15 mins)

2. Install available clients for FreeForm as needed, such as:

   • Smart View (may already be installed)

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- Financial Reporting Web Studio

Read this: Available Clients and Utilities (10 mins)

Log in and setup

1. Log in to FreeForm.

   Read this: Accessing EPM Cloud (10 mins)

2. Navigate around the Home page.

   Read this: Understanding the Home Page (5 mins)

3. Get ready to work in FreeForm, such as setting preferences.

   Read this: Preparing to Work in Planning (10 mins)

   Watch this video: Overview: Setting User Preferences in Planning (3:20 mins)

4. Get ready to use Smart View (optional).

   Read about:

   - Opening Forms in Excel (5 mins)
   - Starting Ad hoc Analysis (5 mins)
   - Smart View Components (5 mins)

   Watch these videos:

   - Navigating Smart View (5 mins)
   - Creating Basic Ad Hoc Reports in Smart View (5 mins)

Start using FreeForm

1. Start working with FreeForm forms and learn how to create and update plans quickly.

   Read this: Working in Forms (10 mins)

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   Read this: Working with Reports (20 mins)

5. Use ad hoc grids to quickly drill into data slices that are important to you.

   Read this: Using Ad Hoc for Data Entry and Analysis (20 mins)

   Watch this video: Performing New EPM Grid Operations (4:47 mins)

Part IV
Viewer

Related Topics

- Learn and Connect Checklist for FreeForm Viewers
- Log In and Start Checklist for FreeForm Viewers

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Learn and Connect Checklist for FreeForm Viewers

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Install clients and configure

Make sure your browser meets the prerequisites.

Read this: Setting Up Browsers for EPM Cloud (15 mins)

Chapter 9

Log in and setup

1. Log in to FreeForm.

   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 FreeFormsuch as setting preferences.

   Read this: Preparing to Work in Planning (10 mins)

4. Get ready to use Smart View.

   Read about:

   • Opening Forms in Excel (5 mins)

   • Smart View Components (5 mins)

   Watch this video: Navigating Smart View (5 mins)

Start using FreeForm (Optional)

View, analyze, and report on your FreeForm data using dashboards, infolets, and reports.

Read this: Reviewing Data (15 mins)

Watch this video: Reviewing Data (4:21 mins)

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