

# Oracle® Fusion Cloud EPM Planning Quick Start Checklists



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Oracle Fusion Cloud EPM Planning Quick Start Checklists,

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# Documentation Accessibility

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Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

# 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](mailto:epmdoc_ww@oracle.com).

# Part I

## Service Administrator

### **Related Topics**

- [Learn and Connect Checklist for Planning Service Administrators](#)
- [Implement Planning Checklist for Service Administrators](#)
- [Administering Planning Checklist for Service Administrators](#)

# 1

## Learn and Connect Checklist for Planning Service Administrators



Welcome, Planning Service Administrators!



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

### Learn about Planning



1. Orient yourself with Planning by watching this [video tour](#). (8 minutes)
2. Read a [Planning overview](#). (5 minutes)
3. Step through a tutorial about the [Help Center](#), your one-stop shop for different kinds of assistance, to explore learning resources. (10 minutes)
4. Visit the [Planning library](#) on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

### Start using Planning





1. Review the basic Planning, Budgeting and Forecasting [steps](#) that you'll perform. (25 minutes)
2. Get familiar with the [application interface](#) and how you'll start your planning activities. (25 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 [Planning features](#) from previous monthly updates. (5 minutes)

### Connect with Planning communities



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### Creating and Running an EPM Center of Excellence



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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?

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 Planning Checklist for Service Administrators



Welcome, Planning Service Administrators!



Here's a checklist to help you step through your Planning 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 Planning 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 Planning



#### 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 minutes)

### 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.  
Read this: [Best Practices for Designing Your Application](#) (15 mins)  
Watch this video: [Designing Planning Applications in Oracle Planning and Budgeting Cloud](#) (5:40)
2. From the landing page, create a custom Planning application via the Application Creation wizard (includes setting up start/end year, planning frequency, currency, customizing dimensions, and other settings).  
Read this: [Creating an EPM Enterprise Cloud Service Application](#) (15 mins)  
Do this tutorial: [Creating the Enterprise Planning Business Process](#) (60 mins)  
Watch this video: [Setting Up Planning in Cloud EPM](#) (4:39)

### Set preferences, variables, and dimensions



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

Read this: [What Application and System Settings Can I Specify?](#) (15 mins)

Watch this video: [Setting User Preferences in Planning](#) (3:20)

2. Set up dimensions.

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

Do this tutorial: [Managing Dimensions in Planning](#) (35 mins)

Watch this video: [Setting Up Dimensions in Planning](#) (7:40)

3. Set up substitution variables.

Read this: [Creating and Assigning Values to Substitution Variables](#) (10 mins)

### Set up user access



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

- Read this: [Managing Role Assignments at the Application Level](#) (15 mins)
- Read this: [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)

### Load data and configure



1. Load or enter data.

Do this tutorial: [Entering Planning Data](#) (15 mins)

Do this tutorial: [Loading Data in Planning](#) (60 mins)

Watch this video: [Entering and Saving Data in Planning](#) (3:53)

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](#) (10:01)

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

Read this: [Creating Simple Forms](#) (15 mins)

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

### Perform tasks



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

- Create tasks lists to guide users through the planning process.  
Read this: [Administering Task Lists](#) (20 mins)  
Do this tutorial: [Designing Forms and Managing Task Lists in Planning](#) (55 mins)
- Set up an approvals process for plans.  
Read this: [About the Approvals Process](#) (15 mins)  
Do this tutorial: [Managing Approvals in Planning](#) (20 mins)
- Set up navigation flows to control how roles or groups interact with Planning.  
Read this: [Understanding Navigation Flows](#) (20 mins)  
Watch this video: [Designing Navigation Flows in Planning](#) (3:59)
- Browse the Table of Contents in the *Administering Planning* guide to see if other tasks are required for your implementation.  
Browse this: [Administering Planning](#) (30 mins)

### 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 Planning Checklist for Service Administrators



Welcome, Planning Service Administrators!



Here's a checklist to help you get going with the Planning 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 after the Planning application is ready to use. It is assumed that the Identity Domain Administrator has created users and granted predefined roles, and the Planning 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 what was already done during implementation, your organization's requirements, and the application design.

### Start Administering Planning



**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)

### 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
  - Financial Reporting Web Studio

- Predictive Planning
- Strategic Modeling

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)

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 Planning users and many aspects of the application and the system, and create announcements for users.

Read this: [What Application and System Settings Can I Specify?](#) (15 mins)

Watch this video: [Setting User Preferences in Planning](#) (3:20)

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 Planning Power Users](#)
- [Log In and Start Checklist for Planning Power Users](#)

# 4

## Learn and Connect Checklist for Planning Power Users



Welcome, Planning Power Users!



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

### Learn about Planning



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2. Read a [Planning overview](#). (5 minutes)
3. Step through a tutorial about the [Help Center](#), your one-stop shop for different kinds of assistance, to explore learning resources. (10 minutes)
4. Visit the [Planning library](#) on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

### Start using Planning



1. Review the basic Planning, Budgeting and Forecasting [steps](#) that you'll perform. (25 minutes)
2. Get familiar with the [application interface](#) and how you'll start your Planning activities. (25 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 [Planning features](#) from previous monthly updates. (5 minutes)

#### **Connect with Planning communities**



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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?

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](#).
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# 5

## Log In and Start Checklist for Planning Power Users



Welcome, Planning Power Users!



Here's a checklist to help you get going with Planning 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 after the Planning application is ready to use. It is assumed that the Planning 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. Install available clients as needed, such as:

- Smart View (may already be installed)
- Product-specific extensions
- Financial Reporting Web Studio
- Predictive Planning
- Strategic Modeling

Read this: [Available Clients and Utilities](#) (10 mins)

### Log in and setup



1. Log in to Planning.

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 Planning, 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)

### Start using Planning



1. Start working with Planning 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](#) (3:38 mins)

2. Learn the basics of working with your Planning 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. Set up the approvals process for your business users.

Read this: [Building a Plan with Approval Units](#) (20 mins)

Watch this video: [Overview: Approvals in Enterprise Planning and Budgeting Cloud](#) (3:29 mins)

6. 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](#) (3:03 mins)

# Part III

## User

### **Related Topics**

- [Learn and Connect Checklist for Planning Users](#)
- [Log In and Start Checklist for Planning Users](#)

# 6

## Learn and Connect Checklist for Planning Users



Welcome, Planning Users!



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

### Learn about Planning



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2. Read a [Planning overview](#). (5 minutes)
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**See new features in each monthly update**



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### How Do I Get Started?

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### Learn More

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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. 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 Planning Viewers](#)
- [Log In and Start Checklist for Planning Viewers](#)

# 8

## Learn and Connect Checklist for Planning Viewers



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### Learn More

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## Log In and Start Checklist for Planning Viewers



Welcome, Planning Viewers!



Here's a checklist to help you get going with Planning 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 after the Planning application is ready to use. It is assumed that the Planning 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



Make sure your browser meets the prerequisites.

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

## Log in and setup



1. Log in to Planning.  
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 Planning, such as setting preferences.  
Read this: [Preparing to Work in Planning](#) (10 mins)

## Start using Planning



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

Read this: [Reviewing Data](#) (15 mins)

Watch this video: [Reviewing Data](#) (4:21)