

# Oracle® Fusion Cloud EPM

## Profitability and Cost Management Quick Start Checklists



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

F46546-04

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# Documentation Accessibility

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## **Access to Oracle Support**

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

# 1

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



Welcome Profitability and Cost Management Service Administrators!



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

### Learn about Profitability and Cost Management



1. Orient yourself with Profitability and Cost Management by watching this [video tour](#). (5 minutes)
2. Review Profitability and Cost Management [user types and documentation](#) to learn about Profitability and Cost Management features that are designed for specialized use, and where to find the appropriate documentation for these features. (3 minutes)
3. Visit the [Profitability and Cost Management library](#) on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

### Start using Profitability and Cost Management





1. Review the [essential concepts](#) you must understand in order to model cost and revenue flows with Profitability and Cost Management. (3 minutes)
2. Review the [guidelines for working with a Profitability and Cost Management application](#). (5 minutes)
3. Learn how to model data in 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 [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 Profitability and Cost Management.
- Use the [Idea Lab](#) to influence Oracle's product development, share, vote, and comment on your favorite ideas.
- Use the [EPM Platform Forum](#) to pose questions, connect with experts, and share your thoughts and ideas about the EPM Platform.
- Attend [Enterprise Performance Management Events](#) to be among the first to know about new release functionality and industry best practices.

### Join a Profitability and Cost Management 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*.

# 2

## Administering Profitability and Cost Management Checklist for Service Administrators



Welcome, 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 PCM 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, create a new Profitability and Cost Management application.

Read this: [Creating a Profitability and Cost Management Application](#) (5 min)

### Create dimensions



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

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

Read this: [Creating Dimensions with Dimension Management](#) (5 min)

### Load dimensions into the application



Load dimensions into your Profitability and Cost Management application.

Read this: [Preparing Flat Files for Each Dimension](#) (5 min)

Read this: [Updating Application Dimensions with Flat Files](#) (5 min)

### Deploy the database to push the dimensions to Essbase



When you add dimensions, you must deploy the database to push the dimensions to Essbase.

Read this: [Deploying Databases](#) (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)
- Financial Reporting Web Studio
- Product-specific extensions

Read 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 Profitability and Cost Management artifacts.

Read these topics:

- [Administrative Tasks and Predefined Roles](#) (10 min)
- [Controlling Application Access](#) (3 min)

- [Granting Access to Data](#) (10 min)

Watch these videos:

- [Managing Users and Assigning Roles in Profitability and Cost Management](#) (5 min)
- [Understanding Security in Profitability and Cost Management](#) (3 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.

# Part II

## Power User

### Related Topics

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



# 3

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



Welcome Profitability and Cost Management Power Users!



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

### Learn about Profitability and Cost Management



1. Orient yourself with Profitability and Cost Management by watching this [video tour](#). (5 minutes)
2. Review Profitability and Cost Management [user types and documentation](#) to learn about Profitability and Cost Management features that are designed for specialized use, and where to find the appropriate documentation for these features. (3 minutes)
3. Visit the [Profitability and Cost Management library](#) on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

### Start using Profitability and Cost Management



1. Review the [essential concepts](#) you must understand in order to model cost and revenue flows with Profitability and Cost Management. (3 minutes)
2. Review the [guidelines for working with a Profitability and Cost Management application](#). (5 minutes)
3. Learn how to model data in Profitability and Cost Management by watching this [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)
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#### Connect with Profitability and Cost Management communities



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#### How Do I Get Started?

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#### Learn More

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# 4

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



Welcome Profitability and Cost Management Power Users!



Here's a checklist to help you get going with Profitability and Cost Management 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 Profitability and Cost Management application is ready to use. It is assumed that the 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)

- Optional. Install the EPM Automate utility to remotely perform tasks within EPM Cloud environments.

Read this: [Installing EPM Automate](#) (5 min)

- Install available clients as needed, such as:
  - Oracle Smart View for Office (may already be installed)
  - Financial Reporting Web Studio
  - Product-specific extensions

Read this: [Available Clients and Utilities](#) (5 mins)

Read this: [Downloading and Installing Clients](#) (5 mins)

### Login and setup



- With the URL for the system provided by your administrator, access Oracle Enterprise Performance Management Cloud.

Read this: [Accessing EPM Cloud](#) (5 mins)

- Navigate around the EPM Cloud Home page and the Profitability and Cost Management Home page.

Read this: [Understanding the Home Page](#) (5 mins)

Read this: [Profitability and Cost Management Home page](#) (5 mins)

- 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 Profitability and Cost Management



- Create POVs.

Read this: [Creating POVs](#) (5 min)

Step through this tutorial: [Working with POVs in EPM Cloud Profitability and Cost Management](#) (40 min)

2. Load data.

Read this: [Deploying and Loading Data into an Application Database](#) (10 min)

Watch these videos:

- [Loading Data in Oracle Profitability and Cost Management](#) (7 min)
- [Loading Data Files Using Data Management Part 1](#) (6 min)
- [Loading Data Files Using Data Management Part 2](#) (4 min)

3. Create rules.

Read this: [Working with Profitability and Cost Management Rules](#) (10 min)

Watch this video: [Managing Rules in Profitability and Cost Management](#) (6 min)

Step through these tutorials:

- [Creating Allocations Rules in Profitability and Cost Management](#) (20 min)
- [Creating Custom Allocation Rules in Profitability and Cost Management](#) (20 min)

4. Validate models.

Read this: [Creating and Managing Model Views](#) (5 min)

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

Step through this tutorial: [Create and Manage Model Views in Profitability and Cost Management](#) (20 min)

5. Run calculations.

Read this: [Calculating an Application](#) (10 min)

Watch these videos:

- [Calculation and Validation in Profitability and Cost Management](#) (6 min)
- [Calculating and Validating Models](#) (6 min)

Step through this tutorial: [Calculating Models in Profitability and Cost Management](#) (60 min)

6. Validate results.

Read this: [Performing Validation Analysis for Profitability and Cost Management](#) (5 min)

Watch this video: [Calculation and Validation in Profitability and Cost Management](#) (6 min)

# Part III

## User

### **Related Topics**

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



# 5

## Learn and Connect Checklist for Profitability and Cost Management Users



Welcome Profitability and Cost Management Users!



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

### Learn about Profitability and Cost Management



1. Orient yourself with Profitability and Cost Management by watching this [video tour](#). (5 minutes)
2. Review Profitability and Cost Management [user types and documentation](#) to learn about Profitability and Cost Management features that are designed for specialized use, and where to find the appropriate documentation for these features. (3 minutes)
3. Visit the [Profitability and Cost Management library](#) on the Help Center to see videos, tutorials, documentation and tools. (5 minutes)

### Start using Profitability and Cost Management



1. Review the [essential concepts](#) you must understand in order to model cost and revenue flows with Profitability and Cost Management. (3 minutes)
2. Review the [guidelines for working with a Profitability and Cost Management application](#). (5 minutes)
3. Learn how to model data in Profitability and Cost Management by watching this [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 [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)

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The EPM CoE team:

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#### 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*.

# 6

## Log in and Start Checklist for Profitability and Cost Management Users



Welcome Profitability and Cost Management Users!



Here's a checklist to help you get going with Profitability and Cost Management 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 Profitability and Cost Management application is ready to use. It is assumed that the Profitability and Cost Management 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: [Supported Browsers](#) (3 mins)  
Read this: [Setting Up Browsers for EPM Cloud](#) (5 mins)
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- Oracle Smart View for Office (may already be installed)
- Financial Reporting Web Studio
- Product-specific extensions

Read this: [Available Clients and Utilities](#) (5 mins)

Read this: [Downloading and Installing Clients](#) (5 mins)

### Login and setup



1. With the URL for the system provided by your administrator, access Oracle Enterprise Performance Management Cloud.

Read this: [Accessing EPM Cloud](#) (5 mins)

2. Navigate around the EPM Cloud Home page and the Profitability and Cost Management Home page.

Read this: [Understanding the Home Page](#) (5 mins)

Read this: [Profitability and Cost Management Home page](#). (5 mins)

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 Profitability and Cost Management



1. Create reports.

Read this: [Working with Profitability and Cost Management Financial Reports](#) (5 min)

2. Create dashboards.

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

3. Create analytics views.

Read this: [About the Profitability and Cost Management Analytics Features](#) (5 min)

Watch this overview video: [Embedded Analytics in Profitability and Cost Management](#) (5 min)

4. Create model views.

Read this: [Creating Model Views](#) (5 min)

5. Trace allocations.

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

6. Create profit curves.

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

# Part IV

## Viewer

### **Related Topics**

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



# 7

## Learn and Connect Checklist for Profitability and Cost Management Viewers



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### Start using Profitability and Cost Management



1. Review the [essential concepts](#) you must understand in order to model cost and revenue flows with Profitability and Cost Management. (3 minutes)
2. Review the [guidelines for working with a Profitability and Cost Management application](#). (5 minutes)
3. Review the highlights of how to get started setting up your application by watching this [video](#). (4 minutes)
4. Learn now to model data in Profitability and Cost Management by watching this [video](#). (5 minutes)



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This checklist is meant to be a general guideline for tasks to be performed on Day 1 after the Profitability and Cost Management application is ready to use. It is assumed that the Profitability and Cost Management 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: [Supported Browsers](#) (3 mins)  
Read this: [Setting Up Browsers for EPM Cloud](#) (5 mins)

- Optional. Install the EPM Automate utility to remotely perform tasks within EPM Cloud environments.

Read this: [Installing EPM Automate](#) (5 min)

- Install Oracle Smart View for Office.

Read this: [Downloading and Installing Clients](#) (5 mins)

### Login and setup



- Access Oracle Enterprise Performance Management Cloud.

Read this: [Accessing EPM Cloud](#) (5 mins)

- Navigate around the EPM Cloud Home page and the Profitability and Cost Management Home page.

Read this: [Understanding the Home Page](#) (5 mins)

Read this: [Profitability and Cost Management Home page](#). (5 mins)

- 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 Profitability and Cost Management



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

Read these topics:

- View reports.

Read this: [Working with Profitability and Cost Management Financial Reports](#) (3 min)

- View dashboards. (5 min)

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

3. View analytics.

Read this: [About the Profitability and Cost Management Analytics Features](#) (5 min)

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

Watch this overview video: [Embedded Analytics in Profitability and Cost Management](#) (5 min)

4. View models.

Read this: [Managing Model Views](#) (5 min)

5. Trace allocations.

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

6. View profit curves.

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