Oracle® Fusion Cloud EPM

Tax Reporting Quick Start Checklists

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Oracle Fusion Cloud EPM Tax Reporting Quick Start Checklists,

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Primary Author: EPM Information Development Team

Contents

Part IV Viewer

Documentation Accessibility

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Part I
Service Administrator

Related Topics

- Learn and Connect Checklist for Tax Reporting Service Administrators
- Implement Tax Reporting Checklist for Service Administrators
- Administering Tax Reporting Checklist for Service Administrators

1

Learn and Connect Checklist for Tax Reporting Service Administrators

Welcome, Tax Reporting Service Administrators!

Here’s a checklist to help you learn about Tax Reporting with links to training, reference materials and community resources.

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   - Tax Reporting Learning Path
2. Get familiar with the application interface and how you'll start your Tax Reporting activities. (25 minutes)

   Read a Overview of the Home Page and Navigation. (5 minutes)

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

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Implement Tax Reporting Checklist for Service Administrators

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Review and bookmark the Oracle Fusion Cloud Enterprise Performance Management Operations Guide

1. Open the 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

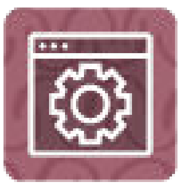
1. Establish the goals, key objectives, and scope of your application

   Read this: Learning About Applications (15 minutes)

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

2. From the landing page, create a custom Tax Reporting 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 minutes)
   - Watch this: Creating a Tax Reporting Application (10 minutes)
   - Watch this: Configuring a Tax Reporting Application (10 minutes)

Set preferences, and dimensions



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

   Read this: Specifying Application Settings (15 minutes)

2. Set up dimensions
   - Read this: Working with Dimensions (15 minutes)
   - Read this: Editing Dimensions in the Simplified Dimension Editor (15 minutes)
   - Watch this: Dimensions Overview (3:45)
   - Watch this: 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 Tax Reporting artifacts
2. Read this: Managing Security (15 minutes)

3. Read this: Managing Users and Roles (15 minutes)
4. Watch this: Understanding Security (2:33)

Load data and configure

1. Load data or Enter data

   Read this: Importing Data (15 minutes)

   Read this: Working With Forms (15 minutes)

   Watch this: Loading Data in Tax Reporting (2:24)
2. Build effective and efficient business rules

   Read this: About Calculation Manager (20 minutes)

   Read this: Working With Business Rules (15 minutes)
3. Create infolets for entering data

   Read this: Viewing Key Information With Infolets (15 minutes)

Perform tasks

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

1. Set up an approvals process for data

   Read this: Managing the Approval Process (15 minutes)

   Watch this video: Setting Up the Approval Process (4:39)
2. Set up navigation flows to control how roles or groups interact with Tax Reporting

   Read this: Understanding Navigation Flows (15 minutes)
3. Browse the Table of Contents in the *Administering Tax Reporting* guide to see if other tasks are required for your implementation

   See this: Administering Tax Reporting (30 minutes)

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 Tax Reporting Checklist for Service Administrators

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Log in and setup

1. Make sure your browser meets the prerequisites

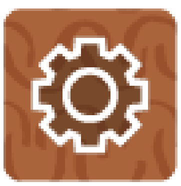
   Read this: Supported Browsers (10 minutes)
2. Enable localization of the user interface (Optional)

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

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

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

Install clients and configure



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

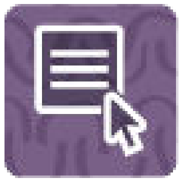
   Read this: Installing EPM Automate (10 minutes)
2. Install available clients as needed, such as:
   - Smart View (may already be installed)
   - Product-specific extensions

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

   Read this: Overview of the Maintenance Snapshot (15 minutes)
4. Learn how to back up the maintenance snapshot each day

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

Set preferences and navigation



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

   Read this: Setting Your Preferences (15 minutes)

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

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

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

Part II

Power User

Related Topics

- Learn and Connect Checklist for Tax Reporting Power Users
- Log In and Start Checklist for Tax Reporting Power Users

4
Learn and Connect Checklist for Tax Reporting Power Users

Welcome, Tax Reporting Power Users!

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Log In and Start Checklist for Tax Reporting Power Users

Welcome, Tax Reporting Power Users!

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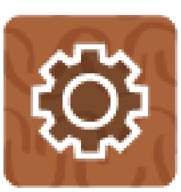
Install clients and configure



1. Make sure your browser meets the prerequisites.

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

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

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3. **Optional:** Install available clients as needed, such as:
   - Smart View (may already be installed)
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   Read this: Available Clients and Utilities (10 minutes)

Log in and setup

1. Log in to Tax Reporting.

   Read this: Access Cloud EPM (10 minutes)

2. Navigate around the Home page.

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Start using Tax Reporting

1. Start working with Tax Reporting forms and learn how to update data quickly.

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   Read this: Working with Reports (20 minutes)

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Part III
User

Related Topics

- Learn and Connect Checklist for Tax Reporting Users
- Log In and Start Checklist for Tax Reporting Users

6

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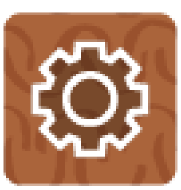

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Part IV

Viewer

Related Topics

- Learn and Connect Checklist for Tax Reporting Viewers
- Log In and Start Checklist for Tax Reporting Viewers

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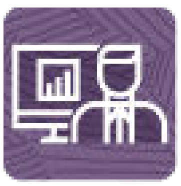

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To ensure you are always in the know, confirm your Customer Connect notification preferences are set for EPM Announcements as well as each Category you're following.

1. To set notification preferences for EPM Announcements, go to **Categories**, then **Announcements**, and then **Enterprise Performance Management**. Next, select the **Notification preferences** drop down.
2. To set notification preferences for each Category, navigate to the Category page and select the **Notification preferences** drop down. You must go to each category page separately and select the **Notification preferences** drop down.

Join a Tax Reporting User Group to collaborate and learn more

Participating in user groups keeps you on the cutting edge of the Cloud EPM 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.

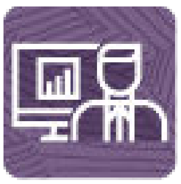
Learn More

- 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*.

9

Log In and Start Checklist for Tax Reporting Viewers

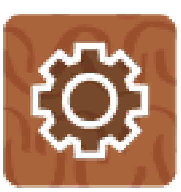
Welcome, Tax Reporting Viewers!



Here's a checklist to help you get going with Tax Reporting 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 Tax Reporting). 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 Tax Reporting application is ready to use. It is assumed that the Tax Reporting 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 Cloud EPM (10 minutes)

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

   Read this: Downloading and Installing Clients (10 minutes)

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 minutes)

Log in and setup

1. Log in to Tax Reporting.

   Read this: Access Cloud EPM (10 minutes)

2. Navigate around the Home page.

   Read this: About the Home Page (5 minutes)

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

   Read this: Setting Your Preferences (15 minutes)

Start using Tax Reporting

1. Start working with Tax Reporting forms and learn how to update data quickly.

   Read this: Working with Forms (15 minutes)

2. Learn the basics of working with your Tax Reporting data.

   Read this: Learning About Applications (15 minutes)

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

   Read this: Using Dashboards to Work with Data (10 minutes)

   Read this: Working with Infolets (15 minutes)

   Watch this video: Dashboards Overview (3:39)

> **Note:**
>
> To learn how to navigate to dashboards in Tax Reporting, read the Dashboards topic listed above.

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

   Read this: Working with Reports (20 minutes)

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

   Read this: Managing the Approval Process (15 minutes)

   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 minutes)
   - Read this: Using Ad Hoc for Data Entry and Analysis (15 minutes)

7. View, analyze, and report on your Tax Reporting data using dashboards, infolets, and reports.

   - Read this: Using Dashboards to Work with Data (15 minutes)
   - Read this: Viewing Key Information with Infolets (15 minutes)
   - Watch this video: Dashboards Overview (3:39)

     > **Note:**
     >
     > To learn how to navigate to dashboards in Tax Reporting, read the Dashboards topic listed above.

   - Read this: Working with Reports (20 minutes)