# Oracle® Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Users





Oracle Cloud Getting Started with Oracle Enterprise Performance Management Cloud for Users,

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## Contents

## **Documentation Accessibility**

## **Documentation Feedback**

## 1 Understanding EPM Cloud Components

Overview of EPM Cloud	1-1
Overview of Oracle Planning and Budgeting Cloud	1-2
Overview of Oracle Enterprise Planning and Budgeting Cloud	1-3
Overview of Oracle Financial Consolidation and Close Cloud	1-4
Overview of Oracle Tax Reporting Cloud	1-5
Overview of Oracle Profitability and Cost Management Cloud	1-6
Overview of Oracle Account Reconciliation Cloud	1-6
Overview of Oracle Enterprise Data Management Cloud	1-7
Overview of Oracle Enterprise Performance Reporting Cloud	1-9
Overview of Strategic Workforce Planning	1-9
Setting Up Browsers for EPM Cloud	1-10
Supported Browsers	1-10
Configuring Internet Explorer	1-11
Configuring Internet Explorer for a Localized Version of the Service	1-12
Configuring Firefox	1-12
Configuring Firefox for a Localized Version of the Service	1-13
Configuring Google Chrome for a Localized Version of the Service	1-14
Browsers on Mobile Devices	1-14
Minimum Screen Resolution	1-15
Accessing EPM Cloud	1-15
Authenticating Using Oracle Cloud Credentials	1-15
Authenticating Using Single Sign-On Credentials	1-16
Understanding the Home Page	1-16
Changing Your Password	1-17
Turning on Accessibility Mode	1-18
Sample EPM Cloud URLs	1-19



Information Sources	1-19
Oracle Cloud Help Center	1-21
Oracle Learning Library	1-21
Understanding EPM Cloud Localization	1-21
Working with EPM Cloud Components	
Available Clients and Utilities	2-1
Prerequisites	2-3
Smart View Requirements	2-4
Calculation Manager Requirements	2-4
Downloading and Installing Clients	2-4
Accessing a Service Using Smart View	2-5
Connection Types	2-6
URL Syntax for Smart View Connections	2-6
Configuring Connections in Smart View	2-7
Configuring a Shared Connection	2-7
Configuring a Private Connection	2-7
Initiating a Connection	2-7
Connecting to a Service Using Financial Reporting Web Studio	2-8
Working in EPM Cloud Environments	
Understanding Updates to an Environment and Viewing Readiness Information	3-1
Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility	3-2
Submitting Feedback Using the Provide Feedback Utility	3-2
Disabling Feedback Notification	3-3
Resolving Connection Issues	



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1

## **Understanding EPM Cloud Components**

Oracle Enterprise Performance Management Cloud combines Oracle's Enterprise Performance Management applications with the innovation and simplicity of the cloud to enable companies of any size to drive predictable performance, report with confidence, and connect the entire organization.

#### In This Section:

- Overview of EPM Cloud
  - Overview of Oracle Planning and Budgeting Cloud
  - Overview of Oracle Enterprise Planning and Budgeting Cloud
  - Overview of Oracle Financial Consolidation and Close Cloud
  - Overview of Oracle Tax Reporting Cloud
  - Overview of Oracle Profitability and Cost Management Cloud
  - Overview of Oracle Account Reconciliation Cloud
  - Overview of Oracle Enterprise Data Management Cloud
  - Overview of Oracle Enterprise Performance Reporting Cloud
- Overview of Strategic Workforce Planning
- · Setting Up Browsers for EPM Cloud
  - Supported Browsers
  - Browsers on Mobile Devices
  - Minimum Screen Resolution
- Accessing EPM Cloud
  - Authenticating Using Oracle Cloud Credentials
  - Authenticating Using Single Sign-On Credentials
- Turning on Accessibility Mode
- Sample EPM Cloud URLs
- Information Sources
  - Oracle Cloud Help Center
  - Oracle Learning Library
- Understanding EPM Cloud Localization

## Overview of EPM Cloud

Oracle Enterprise Performance Management Cloud offers the following services:

Oracle Planning and Budgeting Cloud

- Oracle Enterprise Planning and Budgeting Cloud
- Oracle Financial Consolidation and Close Cloud
- Oracle Tax Reporting Cloud
- Oracle Profitability and Cost Management Cloud
- Oracle Account Reconciliation Cloud
- Oracle Enterprise Data Management Cloud
- Oracle Enterprise Performance Reporting Cloud

#### **About Services and Environments**

You buy a service to work with EPM Cloud. Each service entitles you to two environments—a test environment and a production environment.

## Overview of Oracle Planning and Budgeting Cloud

Oracle Planning and Budgeting Cloud is a subscription-based planning and budgeting solution built for and deployed on Oracle Cloud, using a proven, flexible planning and reporting best-in-class architecture. It delivers instant value and greater productivity for business planners, analysts, modelers, and decision-makers across all lines of business of an enterprise. Users interact through a Web 2.0 or Microsoft Office interface to model, plan, and report. The service, built to scale and perform, uses industry-standard Oracle Cloud infrastructure.

#### **Proven Platform and Technology**

The service helps companies plan their cloud strategy efficiently by avoiding data and business process fragmentation. It is built to optimize Oracle Cloud resources. The service's functional architecture is based on the proven Planning platform, which helps solve simple to complex planning use cases across numerous industries. In Oracle Cloud, enterprise-wide user profiles can be maintained in one place so that they can be reused across all Oracle Cloud Services to which an organization subscribes.

#### **Best-in-Class Functionality**

The service offers an intuitive Web 2.0 and Microsoft Office interface for driver-based modeling, rolling forecasts, and management reporting for time-sensitive and goal-oriented planning activities. You can easily create and share on-the-fly models and validate them against sophisticated statistical predictive capabilities, thus generating unbiased, accurate, and agile plans. This service is built for real-time collaborative planning and variance analysis across the enterprise, using powerful annotations, commentary, document attachments, tasks, workflow, and reporting capabilities.

#### Scalable and Flexible

The service leverages the powerful Essbase OLAP calculation engine and a comprehensive rules framework to enable fast processing of complex calculations for large volumes of data. Time and data intelligence built into the service provides out-of-the-box spreading and fast on-demand aggregation capabilities. By creating and sharing on-the-fly models, you can quickly build and collaborate using Microsoft Excel and Web interfaces.



#### **Enterprise Ready**

The service is a one-stop cloud service to build, deploy, and manage business planning activities for any size organization. It supports small- to large-scale deployment, data backup and migration, plus packaged Enterprise Resource Planning (ERP) data integration capabilities without compromising ease of use or self-service for smaller customers. This service includes comprehensive features to raise issues, get support, and seek product enhancements. It provides flat-file and Excel-based import and export, and comprehensive mapping capabilities for more sophisticated data integration use cases. You can seamlessly load and extract information, and you can drill back to source ERP.

#### **Rapid Deployment**

The service lets you get started immediately, because it requires no initial investment. Your subscription includes everything that you need. You don't need to license, install, upgrade, or patch software. You don't have to buy, install, or configure hardware. You can also leverage the deep product expertise of the worldwide Oracle Hyperion Partner network to develop and deploy cloud-based planning applications in weeks, using quick-start templates.

#### **Portability**

Existing Planning customers can leverage built-in migration capabilities to port their on-premises Planning application to the service. This capability also enables organizations to introduce or extend Planning usage across the enterprise to other lines of businesses without additional demands on their IT resource and budgets.

Watch this video for an overview of key Oracle Planning and Budgeting Cloud features.

Watch this video for an introduction to Oracle Planning and Budgeting Cloud features using the Vision Corporation sample application.

## Overview of Oracle Enterprise Planning and Budgeting Cloud

Oracle Enterprise Planning and Budgeting Cloud comprises complete planning and budgeting solutions for Financials, Workforce, Capital, and Projects. These business processes include built-in best practice predefined content including forms, calculations, dashboards, drivers, and key performance indicators (KPIs). Forms are designed to integrate with the dashboards and reports that dynamically reflect your data, plans, and forecasts.

Watch this overview video to learn more about Oracle Enterprise Planning and Budgeting Cloud.

#### **Financials**

The Financials solution provides integrated driver-based planning for income statement, balance sheet, and cash flow. The out-of-box tools, such as KPIs, drivers,



and accounts help you prepare reports faster. You can also use Financials to perform expense and revenue planning.



Watch this video to learn more about Financials

#### Workforce

The Workforce solution enables headcount and compensation planning to link financial plans with the workforce plan. You can budget for future headcount and related personnel expenses such as salary, benefits, and taxes.



Watch this video to learn more about Workforce

#### **Projects**

The Projects solution bridges the gap between project planning systems and the financial planning process. It helps you assess the impact organizational projects and initiatives have on overall resources to ensure they align with short and long term financial targets.



Watch this video to learn more about Projects

#### Capital

The Capital solution helps you plan for the long-term impact of capital assets on financial plans to manage, prioritize, and plan for capital expenses.



Watch this video to learn more about Capital

#### **Strategic Modeling**

The Strategic Modeling solution combines a set of rich financial forecasting and modeling features with built in on-the-fly scenario analysis and modeling capabilities for long-term strategic planning.



Watch this video to learn more about Strategic Modeling

You might not see all the features described in this guide depending on what your Service Administrator has enabled. Service Administrators can incrementally enable some features, which adds additional forms, dashboards, KPIs, rules, and so on.

## Overview of Oracle Financial Consolidation and Close Cloud

Oracle Financial Consolidation and Close Cloud is a subscription-based consolidation and reporting solution built for and deployed on Oracle Cloud. It provides a simple and quick deployment for users who want fast implementation with no hardware and minimal IT support. It provides a user-friendly and intuitive interface along with built-in functionality for consolidation and close process tasks.

Oracle Financial Consolidation and Close Cloud provides these features:



- Simplified tablet user interface
- Native dashboarding and analysis
- Predefined dimensions for detailed analysis
- Flexible application configuration with pre-built forms and reports
- Currency translations and FX adjustment calculations
- Automated cash flow
- Dynamic out-of-box calculations with limited need for customization
- Simplified Consolidation dimension for easy audit
- Close calendar task management and workflow
- Supplemental schedule data management



View this video to get an overview of the consolidation and close process.

## Overview of Oracle Tax Reporting Cloud

Oracle Tax Reporting Cloud provides a total tax solution to calculate and analyze current and deferred tax at national and regional levels, while unifying your financial close and tax close processes. This application is designed to comply with the standards for accounting for income taxes under GAAP and IFRS.

In a multinational business, regional controllers calculate current and future tax according to local tax laws at the legal entity level. These expenses are then aggregated to national levels. Some jurisdictions may provide for tax filings at a combined level, requiring review and approval at an aggregate level. Oracle Tax Reporting Cloud provides the out-of-the-box forms, logic, provision packages, workflow, and analysis dashboards that will enable you to source, calculate, manage, and approve your tax provision. The application calculates your company's global tax provision, effective tax rate, and deferred tax for tax provisioning purposes. You can also prepare CbCR reporting (Country by Country).

Oracle Tax Reporting Cloud encompasses all stages of your organization's tax provision process, including tax automation, data collection, tax provision calculation, return-to-accrual automation, and tax reporting and analysis. The application enables you to calculate the effective tax rate and cash tax for entities within your jurisdictions, and prepare accounting journals and accompanying financial statement disclosures.

You define sequential and logically grouped tasks for all tax preparation activities, such as reviewing permanent adjustments, temporary differences, and effective tax rates, as follows:

- Use the National Tax Provision package to:
  - Use the dashboards to view current and prior year tax expenses for your entities, and view statutory and effective tax rates.
  - Use entity specific provision packages to determine current and future tax expense and liability.
- Use the **Statutory Effective Tax Rate** analysis in a national or regional provision package to identify the effective rate of tax paid on your pre-tax profits.



- Use the Regional Provision package determine and analyze existing and deferred tax requirements for a particular US state, or province.
- Use Deferred Tax to view future expenses and liabilities. You can drill down on closing balance to access additional details including current year movement, and return to accrual adjustments.
- Use CbCR reporting to analyze your tax expense across jurisdictions, including factors such as return on equity, and revenue by employee.



View this video to get an overview of the Oracle Tax Reporting Cloud process.

## Overview of Oracle Profitability and Cost Management Cloud

To maximize profitability, a business must be able to accurately measure, allocate, and manage costs and revenue. Oracle Profitability and Cost Management Cloud is an analytic software tool that manages the cost and revenue allocations that are necessary to compute profitability for a business segment, such as a product, customer, region, or branch. Oracle Profitability and Cost Management Cloud enables you to use cost decomposition, consumption-based costing and scenario-playing to measure profitability for effective planning and decision support.

Watch this video for a tour of Oracle Profitability and Cost Management Cloud



Oracle Profitability and Cost Management Cloud applications are designed for use by analysts who have deep domain experience in the computation and reporting methods of management reporting, but who may not have much experience with Essbase and scripting syntax or programming languages.

Data for Oracle Profitability and Cost Management Cloud applications is housed in both multidimensional databases and relational databases.

## Overview of Oracle Account Reconciliation Cloud

Reconciliations ensure that a company's financial accounts are validated by checking to see if the balance in the account is correct. Oracle Account Reconciliation Cloud Service makes this process simpler and faster for companies by automating the process and helping users involved in the process collaborate effectively.

Reconciliations ensure that a company's financial accounts are validated by checking to see if the balance in the account is correct. Oracle Account Reconciliation Cloud Service makes this process simpler and faster for companies by automating the process and helping users involved in the process collaborate effectively.

Because account balances are valid at a point in time, and business conditions change, it is critical that reconciliations occur. In addition, companies face stiff penalties for failing to reconcile.

Oracle Account Reconciliation Cloud consists of two modules: Reconciliation Compliance and Transaction Matching.



#### **Reconciliation Compliance**

Reconciliation Compliance helps you manage account reconciliation processes, including balance sheet reconciliations, consolidation system reconciliations, and other reconciliation processes in effect.

Reconciliations can be performed at whatever level makes sense for the business. For example, you could perform some reconciliation by business unit or company code, while performing other reconciliations at the department level. An administrator can create mapping rules to assign the account balances to the reconciliations, and when balances are imported, ensure they appear in the correct reconciliation based on these rules.

The administrator sets up the reconciliation lists that contain the balances to be reconciled, as well as account descriptions, instructions, due dates, and completed dates. Email notifications are sent, reminding other users that due dates are approaching, or that reconciliations can be acted upon.

#### **Transaction Matching**

Transaction Matching is an integrated module of Oracle Account Reconciliation Cloud and the perfect complement to the existing Reconciliation Compliance feature set.

With Transaction Matching, companies can automate performance of high volume/ labor intensive reconciliations, and seamlessly integrate those results into the tracking features within Reconciliation Compliance.

With the addition of this powerful new module, companies save additional time on the performance of reconciliations, while improving quality and reducing risk.

## Overview of Oracle Enterprise Data Management Cloud

Oracle Enterprise Data Management Cloud is a modern, agile data management application that enables enterprises to manage application-specific business viewpoints, govern changes across them, share and map data sets to accelerate cloud deployment, and build an authoritative system of reference.

#### **Work with Applications**

Application creators register each connected business application to generate end user experiences called a default view. Upon registration, creators can assign others as application owners or data managers. Each view contains one or more viewpoints that are optimized to maintain each registered application dimension as a list or a hierarchy. To collaborate, application owners and view owners may then come together to tailor custom views and viewpoints (for example, by subject area or by business domain) to build change management views. Data managers may then apply changes within their purview.

#### Work with Views and Viewpoints

Views are end user portals into enterprise data. Browse or search viewpoints within or across views. Import dirty dimension data into viewpoints from contributing applications, validate and resolve issues to build an authoritative system of reference. Compare viewpoints side-by-side to understand differences. Align related properties visually and copy values. Create requests to share data across viewpoints.



#### **Manage Change with Requests**

Requests represent the fundamental building block of change. Use requests to model changes to any viewpoint. Visualize all changes against the target viewpoint, validate them, analyze impact, and only then commit them. Author changes interactively or in batch from file sources. Browse request activity to audit committed changes.

#### **Create Alternate Views and Viewpoints**

Tailor custom views and viewpoints to build alternate hierarchies, access read-only reference data for comparison purposes, or work with hierarchy members in a list. Copy viewpoints to make a historical snapshot, perform a what-if scenario, or reorganize data as fit-for-purpose.

#### **Information Model**

Each viewpoint is powered by a data chain that specifies associated business objects (using node types), associated parent child relationships (using relationship sets), and associated predicates such as top nodes (using node sets) to construct each viewpoint for end use. Viewpoints are grouped together logically in views that either represent business applications or subject areas. Application views are defaulted based upon application registration.

#### **Build Data Maps**

Create new data chains to manage mapping relationships. Construct mapping viewpoint to map one or more sources to each target application dimension. Compare source to target and create requests to build data maps across applications. Configure mapping keys and locations for each target dimension to export data maps.

#### **Application Integration**

Accelerate integration with Oracle Enterprise Performance Management Cloud applications, for example, Oracle Enterprise Planning and Budgeting Cloud, via predefined application adapters. Leverage a custom application adapter as open interface to integrate with all other business applications. Use a wizard-driven, configuration experience to onboard applications: establish reusable connections, configure import and export operations, and construct ready-to-use, application-specific views for immediate application maintenance purposes.

#### **Automate Tasks**

Automate tasks interactively or via a scheduled process using the EPM Automate Utility. For example, migrate across service instances, upload and download files, reset an environment and recreate an environment.



#### Watch these videos:

- Overview of Oracle Enterprise Data Management Cloud
- Getting Started with the User Interface of Oracle Enterprise Data Management Cloud



## Overview of Oracle Enterprise Performance Reporting Cloud

Oracle Enterprise Performance Reporting Cloud is an Oracle Cloud solution for management and narrative reporting. It provides a secure, collaborative, and process driven approach for defining, authoring, reviewing and publishing financial and management report packages. In addition, Oracle Enterprise Performance Reporting Cloud offers multidimensional analytics, and you can choose to store, analyze, and source data from the Cloud via built-in analytics or use your own existing data sources for analyzing and authoring doclet content.

#### Key benefits:

- Combine Data and Narrative: Use report packages and doclets to address authoring, collaboration, commentary, and delivery needs.
- Collaborate Securely: Gives report contributors access to content based on their
  role and insures that sensitive content is secure. Also, lets report owners see the
  progress of the reporting lifecycle.
- **Report Confidently:** Allows you to trust that the data is reliable and accurate while providing faster, more accurate insights to all stakeholders.

View this video to get an overview of Oracle Enterprise Performance Reporting Cloud.

## Overview of Strategic Workforce Planning

Oracle Strategic Workforce Planning Cloud, a part of the Oracle Fusion Human Capital Management family, translates long-term corporate strategy into execution plans by ensuring that the strategy is supported by the right workforce—the right skill sets and headcount at the right time.

You look at long-term demand for resources by exploring scenarios that impact those demands. You also look at what's going to happen with your current workforce, for example, through retirement or natural attrition. Evaluating demand against supply helps you understand what gaps there may be—positive or negative—so that you can proactively plan for needed resources. You can anticipate the headcount and skills needed to support your business strategy.

Strategic Workforce Planning provides configurable drivers and demand thresholds that enable planners to answer such questions as, "Do our employees have the right skill sets to accomplish future plans?" and "Will expected expenses and revenues support our plans?". You select the best calculation logic for each driver, which translates driver values to future long-term full-time equivalent (FTE).



Watch this video to learn about Strategic Workforce Planning.

You can also enable Workforce to manage and track headcount expenses. You can then align critical corporate resources—people and dollars—with the strategies that best leverage a competitive advantage. Departments can collaborate to plan headcount and related expenses such as salaries, health care, bonuses, and taxes. Planners can see up-to-date graphics that show expenses and trends.



If Workforce is enabled with all its features, planners can manage and track headcount expenses:

- Analyze, calculate, and report on headcount, salary, bonuses, taxes, and health care expenses
- Plan for hires, transfers, promotions, terminations, and so on
- Define country-appropriate taxes and benefits

## Setting Up Browsers for EPM Cloud

#### **Related Topics**

- Supported Browsers
  Lists the supported and recommended browsers for Oracle Enterprise
  Performance Management Cloud.
- Browsers on Mobile Devices
- Minimum Screen Resolution

## Supported Browsers

Lists the supported and recommended browsers for Oracle Enterprise Performance Management Cloud.

Table 1-1 Supported Browsers for Each Client Platform

Client Platforms	Recommended Browser	Other Supported Browsers
Windows 7, 8, 8.1, and 10	Firefox ESR 45+	Internet Explorer 11 Google Chrome 45+
Apple Mac with OS X 10.9.5 or higher	Firefox ESR 45+	Safari Version 6 through 10. At this time, EPM Cloud is not supported on Safari Version 11.
Linux (all versions)	Firefox ESR 45+	Google Chrome 45+
iOS (7.x and 8.x) devices	Safari version 9	None
Android (4.x and 5.x) devices	Google Chrome 45+	None



Oracle Account Reconciliation Cloud and Oracle Enterprise Performance Reporting Cloud can be accessed from Apple computers running Mac OS X. Use Safari version 10 or lower if you are using Mac OS X.

- Internet Explorer should be used in standard mode. Do not enable Compatibility View and Enterprise Mode.
- See Oracle Mobile Application Framework 2.1.0 Certification Matrix for a list of supported mobile devices.

To ensure access to the service, you must configure your browser to:



Accept cookies from oraclecloud.com and cloud.oracle.com

By default, the browsers are set up to accept cookies from websites. If your browser is configured to not accept cookies from sites, you must allow a per session or permanent exception for these sites

Allow pop-up windows from oraclecloud.com and cloud.oracle.com

#### Configuring Internet Explorer

Configuring Internet Explorer for Oracle Enterprise Performance Management Cloud involves enabling cookies and customizing security settings.

Additionally, you need to complete these steps following:

- Add service URLs to trusted sites:
  - URLs of each environment that you access; for example,

https://env\_type-servicename.pbcs\_usl.oraclecloud.com/workspace

 The following URL of the website from which you access the video feature overviews:

https://apex.oracle.com

- · Enable cookies, ActiveX, and JavaScript
- Enable pop-up windows from oraclecloud.com and cloud.oracle.com.

To configure Internet Explorer settings:

- In Internet Explorer, select Tools, and then Internet Options.
- 2. Add trusted sites.
  - a. In Security, click Trusted Sites, and then Sites.
  - b. In Add this website to the zone, enter the URL of the service environment.
  - c. Click Add.
  - d. Repeat step 2.b and 2.c to add https://apex.oracle.com as a trusted site.
  - e. Click Close.
- Specify security settings.
  - a. In **Security**, click the zone to which your EPM Cloud service belongs (typically, **Internet**), and then **Custom level**.
  - b. Under ActiveX controls and plug-ins,, select Enable as the value of these settings:
    - Allow ActiveX Filtering



Enable ActiveX filtering if you do not want to add https://apex.oracle.com as a trusted site.

- Run ActiveX controls and plug-ins
- c. Under Miscellaneous, select Enable as the value of Allow script-initiated windows without size or position constraints.



- d. Click OK.
- e. Click OK.
- 4. Enable pop-ups from oraclecloud.com and cloud.oracle.com.
  - a. Select Tools, then Pop-up Blocker, and then Pop-up Blocker settings.
  - b. In Address of web site to allow, enter oraclecloud.com, and then click Add.
  - c. In Address of web site to allow, enter cloud.oracle.com, and then click Add.
  - d. Click Close.

## Configuring Internet Explorer for a Localized Version of the Service

You update the language settings of Internet Explorer to access Oracle Enterprise Performance Management Cloud in a language other than the default browser language.

For a list of languages in which the service is available, see Understanding EPM Cloud Localization.



Oracle Enterprise Performance Reporting Cloud can override the browser locale by setting a preferred locale. See Managing User Preferences in *Administering Oracle Enterprise Performance Reporting Cloud* for details.

To modify language settings:

- 1. In Internet Explorer, select **Tools**, and then **Internet Options**.
- 2. In Internet Options, click Languages.
- **3. Optional:** If the language that you want to use is not listed in **Language**, add it using these steps:
  - a. In Language Preference, click Add.
  - b. In **Add Language**, select the desired language, and then click **OK**.
- 4. Click the desired language and then click **Move Up** to move it to the top of the list.
- 5. Click OK.
- 6. Click **OK** to close **Internet Options**.

## **Configuring Firefox**

Configuring Firefox involves enabling Oracle Enterprise Performance Management Cloud pop-ups and modifying privacy settings.

Firefox, by default, is configured to accept cookies from websites. If your browser is configured to not accept cookies from sites, you must allow a per-session or permanent exception for cloud.oracle.com and oraclecloud.com. You must also allow Firefox to open pop-up windows from these websites.

To configure Firefox to accept cookies and enable pop-ups:

Start Firefox



- 2. Select **Tools**, then **Options**, and then **Privacy**.
- 3. Verify the setting in the **Firefox will** field:
  - If the value is set to **Remember history** or **Never remember history**, your browser will use default settings to correctly display the service.
  - If the value is set to Use custom settings for history:
    - Verify that the Accept cookies from sites check box is selected (checked).
    - Click Exceptions, and remove any exception that prevents the following websites from setting cookies:
      - \* cloud.oracle.com
      - \* oraclecloud.com

If the **Accept cookies from sites** check box is not selected, complete the following steps:

- a. Click Exceptions.
- b. In Address of web site, enter cloud.oracle.com, and then click either Allow or Allow for session, depending on your privacy policies.
- c. Repeat step 3.b to add oraclecloud.com.
- d. Click Save Changes.
- 4. Enable pop-up windows from cloud.oracle.com and oraclecloud.com, and, optionally, enable pages to choose their own fonts.
  - a. Click Content.
  - b. If Block pop-up windows is selected (checked), click Exceptions.
  - c. In Address of web site, enter oraclecloud.com, and then click Allow.
  - d. In Address of web site, enter cloud.oracle.com, and then click Allow.
  - e. Click Save Changes.
  - f. For Oracle Enterprise Performance Reporting Cloud only: enable pages to choose their own fonts.
    - i. Click Advanced under Fonts & Colors.
    - ii. Select Allow pages to choose their own fonts, instead of my selections above.
    - iii. Click OK.

## Configuring Firefox for a Localized Version of the Service

You update the language settings of Firefox to access Oracle Enterprise Performance Management Cloud in a language other than the default browser language.

For a list of languages in which the service is available, see Understanding EPM Cloud Localization.



#### Note:

Oracle Enterprise Performance Reporting Cloud can override the browser locale by setting a preferred locale. See Managing User Preferences in *Administering Oracle Enterprise Performance Reporting Cloud* for details.

To modify language settings:

- In Firefox, select Tools, and then Options.
- Click Content to open the Content page.
- 3. Click Choose next to Languages.
- **4. Optional:** If the language that you want to use is not listed in **Languages**, add it using these steps:
  - a. In Languages, click Select a language to add....
  - b. Select the desired language, and then click Add.
- 5. Click the desired language and then click **Move Up** to move it to the top of the list.
- 6. Click OK.

## Configuring Google Chrome for a Localized Version of the Service

You update the language settings of Google Chrome to access the service in a language other than the default browser language. For a list of languages in which the service is available, see Understanding EPM Cloud Localization.

To reconfigure Chrome for a new locale:

- In Google Chrome, access Settings by navigating to the following URL: chrome://settings/
- 2. Click Settings, then Advanced, and then Languages.
- From Language drop-down list, select Add Languages.
- In Add Languages, select the display language for the service and then click ADD.
- 5. Click **More actions** next to the display language for the service that you added in the preceding step and then select **Display Google Chrome in this Language**.
- 6. Click RELAUNCH.

Google Chrome restarts in the selected language.

## **Browsers on Mobile Devices**

Only Google Chrome (on Android mobile devices) and Apple Safari (on iPads and iPhones) are supported for mobile devices. See Oracle Mobile Application Framework 2.1.0 Certification Matrix for a list of supported devices.





Oracle Enterprise Data Management Cloud is not supported on mobile devices.

#### Minimum Screen Resolution

Ensure that the screen resolution of your display unit is set to 1024 x 768 or higher.

## **Accessing EPM Cloud**

You can access an environment using Oracle Cloud or Single Sign-On credentials.

- Using Oracle Cloud credentials. See Authenticating Using Oracle Cloud Credentials.
- Using network credentials if your organization configured Single Sign-On (SSO) access. See Authenticating Using Single Sign-On Credentials.

SSO access between Oracle Enterprise Performance Management Cloud and deployments of Oracle Fusion and NetSuite is also available. Additionally, SSO can be provided by integrating your services with Oracle Identity Cloud Service. See "Managing Single Sign-On" in *Administering Oracle Cloud Identity Management* for information on configuring the SSO process to work with the identity provider that your organization uses. Additionally, your IT administrator may configure browsers for Integrated Windows Authentication (IWA) to allow you to access the service without entering your credentials.



Clients such as the EPM Automate Utility do not work with SSO credentials. The user accounts for accessing such clients must be maintained in EPM Cloud.

## **Authenticating Using Oracle Cloud Credentials**

The first time you log in, check the email from Oracle Cloud Administrator (oraclecloudadmin\_ww@oracle.com) for your user name and a temporary password. Check the email from your Service Administrator for the URL to access the service.

To access the service, you must have the following information:

- The URL of an Oracle Cloud environment
- A user name
- A password

To access an environment:

- Go to the URL of an Oracle Enterprise Performance Management Cloud environment.
- Enter your user name and password.



#### 3. Click Sign In.

If you have already reset your default password, the Home page is displayed.

If you are accessing the service for the first time, the **Password Management** screen is displayed to help you personalize your password.

- a. In **Old Password**, enter the temporary password that you received in the email from Oracle Cloud Administrator (oraclecloudadmin\_ww@oracle.com).
- **b.** In **New Password** and **Re-Type Password**, enter a new password that conforms to the password policy displayed on screen.
- c. In Register challenge questions for your account, select challenge questions and their answers. These are used to retrieve the password if you forget it.
- d. Click Submit.

## Authenticating Using Single Sign-On Credentials

The process of signing in is determined by your organization's SSO configuration. If you are in a setup that uses IWA, upon accessing an Oracle Enterprise Performance Management Cloud URL, the SSO process may not prompt you to supply a user name and password.

To access an environment using your SSO credentials:

- 1. Go to the URL of an EPM Cloud environment.
- 2. Click Company Sign In.

#### Note:

In SSO enabled environments, **Company Sign In** is the only option available to most users. Service Administrators and Oracle Account Reconciliation Cloud Power Users, whose accounts are configured to run EPM Cloud client components such as EPM Automate Utility, will see an additional option to sign in using Traditional Cloud Account.

If you are in a setup that uses IWA, the landing page of the service is displayed. Otherwise, a login screen is displayed.

3. If a sign in screen is displayed, enter the user name and password that you use to access your organization's network resources, and then click **OK**.

## Understanding the Home Page

When you sign into an environment, the Home page, which contains cards that group the activities that you can perform in the environment, is displayed. Cards provide access to key tasks, tutorials, and related information. On clicking a card, a page containing available shortcuts opens. Availability of shortcuts on a page depends on the role you have in the environment.

In addition to service-specific cards, the following common panels, cards and icons are available on the Home page.



#### **Welcome Panel**

The Welcome Panel gives you quick access to key information including messages and the tasks assigned to you. What you see in the Welcome Panel depends on the service.

#### **Academy**

Click **Academy** to access a variety of resources for understanding and working with the service. Available resources includes video overviews, tutorials, and information on key tasks.

#### **Navigator**

Click to open a list of shortcuts that mirror the features and functionality that you normally access from the cards available on the Home page.

#### **Settings and Actions Menu**

Click your user name at the top-right corner of the screen to display **Settings and Actions**. The options available in this menu depend on your role. Generally, you use this menu to access online Help, the Provide Feedback utility, Downloads page, and Oracle Support website, and to sign out of the environment.

You can also access Oracle Cloud Customer Connect, a community gathering place for members to interact and collaborate on common goals and objectives, from **Settings and Actions**. You will find the latest release information, upcoming events, and answers to use-case guestions on Oracle Cloud Customer Connect.

#### **Accessibility Settings Icon**

Click to specify accessibility settings to enable screen readers and the high contrast setting.

#### **Home Icon**

Click to return to the Home page.

#### Show/Hide Bar

The Show/Hide bar is available after you select an option from a card on the Home page. You click it to hide or show the contents of the current card.

## **Changing Your Password**

At your first login, you are prompted to personalize your password and set responses to challenge questions to retrieve the password if you forget it. Subsequently, you can



reset the password and change your challenge questions and responses from the My Profile page of the My Services application.



This information is not applicable to users who use the **Company Sign In** option to access an environment.

#### To change your password:

Go to the Oracle Cloud website:

http://cloud.oracle.com

- 2. Click Sign In.
- 3. Under Cloud Account, select an account type and data center, for example, US Commercial 1 (us1).
- 4. Click My Services.
- 5. Enter your identity domain and click Go.
- Enter your Oracle account credentials (user name and password), and click Sign In.
- Click My Profile.
- 8. To change your current password:
  - a. In Old Password, enter your current password.
  - b. In New Password and Confirm New Password, enter a new password that abides by the password policy.
  - c. Click Submit.

## **Turning on Accessibility Mode**

Except in Oracle Enterprise Data Management Cloud environments, accessibility mode is not enabled by default. A Service Administrator must enable the use of screen reading software from your environment before other users can use accessibility mode.

If you are using a screen reader, Oracle recommends that you use Internet Explorer; some service screens may not display properly if you use other browsers.

#### See these guides:

- Accessibility Guide for Oracle Planning and Budgeting Cloud
- Accessibility Guide for Oracle Profitability and Cost Management Cloud
- Accessibility Guide for Oracle Account Reconciliation Cloud
- Accessibility Guide for Oracle Enterprise Performance Reporting Cloud



## Sample EPM Cloud URLs

You use a unique URL to access each Oracle Enterprise Performance Management Cloud environment. A Service Administrator provides this URL to users.

#### **Format**

Typically, in addition to an application context, an environment URL identifies the service name, type, and the identity domain in the following format:

 $\label{lem:https://ServiceName-IdentityDomainName-ServiceType.DataCenter.oraclecloud.com/applicationcontext$ 

For example, an Oracle Planning and Budgeting Cloud environment URL may be as follows:

https://example-idDomain-pbcs.doml.oraclecloud.com/HyperionPlanning, Where

example is the service name, idDomain is the name of the identity domain that services the environment, pbcs is the service type of the environment, dom1 is the data center that hosts the environment, and HyperionPlanning is the application context.

#### Sample URLs

#### **Oracle Planning and Budgeting Cloud**

- https://example-idDomain-pbcs.dom1.oraclecloud.com/HyperionPlanning
- https://example-idDomain-pbcs.dom1.oraclecloud.com/workspace/index.jsp

## Oracle Enterprise Planning and Budgeting Cloud and Oracle Financial Consolidation and Close Cloud

https://example-idDomain-pbcs.dom1.oraclecloud.com/HyperionPlanning

#### **Oracle Tax Reporting Cloud**

https://example-idDomain-pbcs.dom1.oraclecloud.com/workspace

Oracle Profitability and Cost Management Cloud, Oracle Account Reconciliation Cloud, Oracle Enterprise Data Management Cloud, and Oracle Enterprise Performance Reporting Cloud

https://example-idDomain-epm.doml.oraclecloud.com/epm

## Information Sources

These documents contain information on performing tasks from Oracle Enterprise Performance Management Cloud components:

Table 1-2 Information Sources for EPM Cloud Users

Document Title	Description
Working with Planning for Oracle Planning and Budgeting Cloud	Explains how to perform tasks in Oracle Planning and Budgeting Cloud.



Table 1-2 (Cont.) Information Sources for EPM Cloud Users

Document Title	Description
Working with Planning for Oracle Enterprise Planning and Budgeting Cloud	Provides information on the tasks you can perform in Oracle Enterprise Planning and Budgeting Cloud.
Working with Oracle Smart View for Office	Explains how to use Oracle Smart View for Office to interact with EPM Cloud services.
Working with Strategic Modeling in Smart View	Details how to use Smart View to create and manage financial models.
Working with Predictive Planning in Smart View	Provides information on using Predictive Planning, and extension of Smart View, to predict performance based on historical data.
Working with Oracle Financial Consolidation and Close Cloud	Contains information on performing tasks using Oracle Financial Consolidation and Close Cloud.
Working with Financial Reporting for Oracle Enterprise Performance Management Cloud	Details how to set up Financial Reporting to create financial reports, and how to view and interact with reports.
Working with Oracle Profitability and Cost Management Cloud	Explains how to use Oracle Profitability and Cost Management Cloud to complete tasks such as perform allocations and calculations, and balance rules for application validation.
Reconciling Accounts with Oracle Account Reconciliation Cloud	Details the procedures to reconcile accounts using the Reconciliation Compliance and Transaction Matching features of Oracle Account Reconciliation Cloud.
Working with Oracle Tax Reporting Cloud	Provides information on performing tasks in Oracle Tax Reporting Cloud to calculate, report on, and approve current and deferred taxes at federal and local levels using financial data, to meet standards such as US GAAP, and IFRS reporting.
Administering and Working with Oracle Enterprise Data Management Cloud	Explains how to use Oracle Enterprise Data Management Cloud to manage all your enterprise data and work with business perspectives.
Creating and Managing Report Packages for Oracle Enterprise Performance Reporting Cloud	Explains the tasks involved in creating and managing report packages that provide a secure, collaborative, and process driven approach for defining, authoring, reviewing and publishing financial and management reports.
Administering and Working with Oracle Strategic Workforce Planning Cloud	Details how to complete tasks using Oracle Strategic Workforce Planning Cloud.
Authoring and Approving Doclets for Oracle Enterprise Performance Reporting Cloud	Provides information on authoring and approving doclets using Oracle Enterprise Performance Reporting Cloud and Smart View.
Reviewing, Signing, and Receiving Report Packages in Oracle Enterprise Performance Reporting Cloud	Contains information to help you review and sign report packages using Oracle Enterprise Performance Reporting Cloud and Smart View.



Table 1-2 (Cont.) Information Sources for EPM Cloud Users

Document Title	Description
Working with Management Reporting for Oracle Enterprise Performance Reporting Cloud	Explains how to use Management Reporting to create EPM Cloud financial and managerial reports.
Working with Disclosure Management for Oracle Enterprise Performance Reporting Cloud	Helps you work with Disclosure Management to create and edit graphically the Extensible Business Reporting Language (XBRL(c)) tagged submissions to a regulatory agency (for example, a 10K or 10Q submitted to the SEC).

## **Oracle Cloud Help Center**

The Oracle Cloud Help Center is the hub for accessing the latest Oracle Enterprise Performance Management Cloud books, Help topics, and videos.

The URL of the Cloud Help Center:

http://docs.oracle.com/en/cloud/saas/index.html

#### **Service-Specific Libraries**

To access a library containing the latest documentation for a service, click the name of the service in the **Enterprise Performance Management** section of Oracle Cloud Help Center.

#### **Videos and Tutorials**

- To access EPM Cloud videos that provide overview information as well as instructions to use application features, click Videos in the navigation pane of the Cloud Help Center.
- To access service-specific videos, open the documentation library of the service, and then click **Videos** in the navigation pane.

## Oracle Learning Library

The Oracle Learning Library is dedicated to hosting free instructional content developed by Oracle subject-matter experts.

Use the Search function in Oracle Learning Library to find tutorials, overview videos and Oracle by Example (OBE) tutorials.

## **Understanding EPM Cloud Localization**

Oracle Enterprise Performance Management Cloud user interface, Online Help, and guides are available in many languages.

#### **User Interface**

Generally, EPM Cloud user interface is translated into Arabic , Danish, German, Spanish, Finnish, French, French Canadian, Italian, Japanese, Korean, Dutch,

Norwegian, Polish, Portuguese (Brazilian), Russian, Swedish, Turkish, Simplified Chinese, and Traditional Chinese.

Additionally, Oracle Smart View for Office user interface is translated into Czech, Greek, Hungarian, Hebrew, Portuguese, Romanian, Slovak, and Thai.

#### Note:

To change the language displayed on the user interface and online Help, see the following:

- Configuring Internet Explorer for a Localized Version of the Service
- Configuring Firefox for a Localized Version of the Service
- Configuring Google Chrome for a Localized Version of the Service

For information to display a localized version of Smart View, see "Translation Information" in *Working with Oracle Smart View for Office*.

#### **Exceptions**

- Oracle Account Reconciliation Cloud and Oracle Profitability and Cost
   Management Cloud user interfaces are not translated into Arabic and Norwegian.
- Disclosure Management user interface is not translated into Arabic .

#### **Online Help and Documentation**

Online Help and guides are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese. *Working with Oracle Smart View for Office* is translated into Dutch also.

The translated online help and documentation cover all features up to May 4, 2018, except for *Working with Oracle Smart View for Office*, which covers translated features up to January 5, 2018.

To see the latest documentation, use the English documentation on the Books tab.

#### **Sample Applications and Demos**

EPM Cloud sample applications, demos, and data are in English only.

#### **Videos**

The overview video closed captions are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese.

Tutorial video closed captions are not translated.



## Working with EPM Cloud Components

#### In This Section:

- Available Clients and Utilities
- Prerequisites
  - Smart View Requirements
  - Calculation Manager Requirements
- Downloading and Installing Clients
- Accessing a Service Using Smart View
  - Connection Types
  - URL Syntax for Smart View Connections
  - Configuring Connections in Smart View
  - Initiating a Connection
- · Connecting to a Service Using Financial Reporting Web Studio

## **Available Clients and Utilities**

Depending on your role, you can download components, utilities, and templates for the following Oracle Enterprise Performance Management Cloud.

- Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning and Budgeting Cloud
- Oracle Financial Consolidation and Close Cloud and Oracle Tax Reporting Cloud
- Oracle Profitability and Cost Management Cloud
- Oracle Account Reconciliation Cloud
- Oracle Enterprise Data Management Cloud
- Strategic Workforce Planning
- Oracle Enterprise Performance Reporting Cloud

#### Clients and Utilities for Power Users and Users (Users)

This is a list of all clients and utilities available from EPM Cloud subscriptions.

EPM Automate Utility

The EPM Automate Utility allows Service Administrators to access environments over a command window to automate business activities such as exporting application and downloading the exported application to desktop. See About the EPM Automate Utility in Working with EPM Automate for Oracle Enterprise Performance Management Cloud for details.

Oracle Smart View for Office

Smart View provides a common Microsoft Office interface designed specifically for EPM Cloud.

Planning Extensions

Planning Extensions include Smart View Admin Extensions and Planning application templates, which facilitate application administration activities, such as dimension management, to be performed from within the Excel interface.

Smart View Add-On For Administrator

Allows application administration activities, such as dimension management, to be performed from within the Excel interface.

Smart View Extension for Close and Supplemental Data Management
 Enables users to perform close and supplemental data management from within the Excel Interface.

Smart View Extension for Enterprise Performance Reporting

Allows users to perform assigned tasks and analyze model data from within the Microsoft Office suite.

Smart View Extension for Disclosure Management

Allows users to perform disclosure management activities, including tagging, validation and instance generation from within Microsoft Word.

Smart View Extension for Disclosure Management Auto Tagging
 Provides the ability to perform high volume XBRL for auto tagging as part of Disclosure Management from within Microsoft Excel.

Financial Reporting Web Studio

Financial Reporting Studio enables book-quality financial reporting that meets the requirements of the Finance department or any functional area that requires highly formatted multidimensional reporting. You access this component by accessing a link in the service.

Strategic Modeling

Strategic Modeling is an add-on to Smart View that enables users to interact with the Strategic Modeling business process.

Predictive Planning

Predictive Planning is an extension to Smart View that works with valid forms to predict performance based on historical data.

File Transfer Utility

This utility allows Service Administrators to access Oracle Enterprise Performance Reporting Cloudenvironments over a command window to automate business activities

Sample Content

Provides sample report packages, management reports, dimension and data load files, and a sample application.

Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning and Budgeting Cloud

Smart View



- · Planning Extensions
- Predictive Planning
- Financial Reporting Web Studio
- Strategic Modeling (for Oracle Enterprise Planning and Budgeting Cloud only)

#### Oracle Financial Consolidation and Close Cloud and Oracle Tax Reporting Cloud

- Smart View
- Smart View Add-On For Administrator
- Smart View Extension for Close and Supplemental Data Management

#### **Oracle Profitability and Cost Management Cloud**

- EPM Automate Utility
- Smart View
- Financial Reporting Web Studio

#### **Oracle Account Reconciliation Cloud**

**EPM Automate Utility** 

#### **Oracle Enterprise Data Management Cloud**

**EPM Automate Utility** 

#### **Strategic Workforce Planning**

- Smart View
- Planning Extensions
- Predictive Planning

#### **Oracle Enterprise Performance Reporting Cloud**

- Smart View
- Smart View Extension for Enterprise Performance Reporting
- Smart View Extension for Disclosure Management
- Smart View Extension for Disclosure Management Auto Tagging
- File Transfer Utility
- Sample Content

## **Prerequisites**

#### **Related Topics**

• Smart View Requirements

Excepting Oracle Account Reconciliation Cloud and Oracle Enterprise Data Management Cloud, all Oracle Enterprise Performance Management Cloud services use Oracle Smart View for Office as a client component.



Calculation Manager Requirements
 Shockwave Flash (Firefox) or Adobe Flash Player (Internet Explorer) is required.

## **Smart View Requirements**

Excepting Oracle Account Reconciliation Cloud and Oracle Enterprise Data Management Cloud, all Oracle Enterprise Performance Management Cloud services use Oracle Smart View for Office as a client component.

These services must satisfy Microsoft Office requirements in addition to Smart View requirements.

- The newest Smart View release is available from the Downloads tab on Oracle Technology Network.
- Microsoft Office 2010, 2013, or 2016
- .NET Framework 4.5 or higher

#### Note:

- Some services provide extensions and templates, which you download
  and install after installing Smart View. Extensions and templates
  applicable to a service are available from the download location of the
  service.
- For Smart View platform requirements, see the 11.1.2.x version of the Oracle Enterprise Performance Management System Certification Matrix, which is posted on Oracle Technology Network.

## Calculation Manager Requirements

Shockwave Flash (Firefox) or Adobe Flash Player (Internet Explorer) is required.

These services do not use Calculation Manager.

- Oracle Profitability and Cost Management Cloud
- Oracle Tax Reporting Cloud
- Oracle Account Reconciliation Cloud
- Oracle Enterprise Performance Reporting Cloud

## **Downloading and Installing Clients**

You download Oracle Enterprise Performance Management Cloud components and utilities from the **Downloads** page. You can download Oracle Smart View for Office from Oracle Technology Network.

For information on installing the EPM Automate Utility, see "About the EPM Automate Utility" in Working with EPM Automate for Oracle Enterprise Performance Management Cloud.

To install EPM Cloud clients:



- 1. Sign in to an environment. See Accessing EPM Cloud.
- 2. On the **Home** page, access **Settings and Actions** by clicking your user name at the top right corner of the screen.
- Click Downloads.

The Downloads page opens. This page lists only the components applicable to the service that you are currently accessing.

4. Download the component that you want to install:

#### For Smart View only:

a. Click Download from Oracle Technology Network.

The Oracle Technology Network download page is displayed.

- b. Click Download Latest Version.
- c. Select Accept License Agreement, and then click Download Now.
- d. If prompted to sign in, enter your Oracle Technology Network credentials and click Sign In.
- Follow the on-screen instructions and save the Smart View archive to a local folder.
- f. Unzip the Smart View archive to extract SmartView.exe.
- g. Close all Microsoft Office applications.

#### For components other than Smart View:

- In the **Downloads** page, click the **Download** button of the component that you
  want to install.
- **b.** Follow the on-screen instructions and save the installer to a local folder.
- 5. Run the installer (for example, SmartView.exe) as an administrator.



Before starting the installation process:

Before installing Smart View, close all Microsoft Office applications.

## Accessing a Service Using Smart View

You can use a shared Connection or a private connection to access or Oracle Smart View for Office.

#### **Related Topics**

Connection Types

Oracle Smart View for Office supports these connection types. You see the same data irrespective of the connection type you use.

URL Syntax for Smart View Connections
 Oracle Smart View for Office uses different URL syntax for shared and private connections.



- Configuring Connections in Smart View
   After installing Oracle Smart View for Office, you must set up a connection to an environment.
- Initiating a Connection
   You may need to sign in to initiate a Oracle Smart View for Office connection.

## **Connection Types**

Oracle Smart View for Office supports these connection types. You see the same data irrespective of the connection type you use.

- Shared connections: Use public URL of an environment, which is also used to
  access the environment through a browser, to establish a connection between
  Smart View and an Oracle Enterprise Performance Management Cloud
  environment. See Configuring a Shared Connection
- Private connections: Use the an environment-specific URL to establish a connection between Smart View and an EPM Cloud environment. See Configuring a Private Connection.

See "Shared Connections and Private Connections" in *Working with Oracle Smart View for Office* for more information on these connection types.



Oracle Account Reconciliation Cloud does not use Smart View.

## **URL Syntax for Smart View Connections**

Oracle Smart View for Office uses different URL syntax for shared and private connections.

Use the following information as a guide to the URL syntax you must specify for each service type.

Oracle Planning and Budgeting Cloud, Oracle Enterprise Planning and Budgeting Cloud, Oracle Financial Consolidation and Close Cloud, and Oracle Tax Reporting Cloud

#### **Shared connection syntax:**

https://env-example-idDomain.doml.oraclecloud.com/workspace/SmartViewProviders

#### Private connection syntax:

https://env-example-idDomain.doml.oraclecloud.com/HyperionPlanning/SmartView

Oracle Profitability and Cost Management Cloud and Oracle Enterprise Performance Reporting Cloud

#### Private connection syntax:

https://env-example-idDomain.dom1.oraclecloud.com/epm/SmartView



## Configuring Connections in Smart View

After installing Oracle Smart View for Office, you must set up a connection to an environment.

- Configuring a Shared Connection
- · Configuring a Private Connection

## Configuring a Shared Connection

To configure a shared connection:

- 1. Start Microsoft Excel.
- 2. Click Smart View, then Options, and then Advanced.
- In Shared Connections URL, enter the connection URL. See URL Syntax for Smart View Connections for connection syntax.
- 4. Click OK.

## Configuring a Private Connection

See "Using Quick Connection Method" in *Working with Oracle Smart View for Office* for an alternate way to create a private connection.

To configure a private connection using the Private Connection Wizard:

- 1. Start Microsoft Excel.
- Click Smart View and then Panel.
- 3. In Smart View Panel, click the arrow next to (Switch to), and then select **Private Connections**.
- Click Create new connection at the bottom of the panel.
- From Smart View, select Smart View HTTP Provider.
- In URL, enter the connection URL. See URL Syntax for Smart View Connections for connection syntax.
- 7. Click Next.
- 8. In **Login**, enter the user name and password for accessing the service, and then click **Sign In**.
- In Add Connection Application/Cube, navigate to the application and cube to work with, select it, and then click Next.
- In Add Connection Name/Description, enter a name for the connection and an optional description.
- 11. Click Finish.

## **Initiating a Connection**

You may need to sign in to initiate a Oracle Smart View for Office connection.

You can connect to only one service per worksheet.



Watch this video to see a tutorial on navigating in Oracle Smart View for Office, including connecting to a data source.

To initiate a connection:

- Start Microsoft Excel.
- 2. Click Smart View, and then Panel.
- 3. Click the arrow next to  $\square$  (Switch to), and then do one of the following:
  - Select Shared Connections, and then select a shared connection that you
    previously configured. See Configuring a Shared Connection.
  - Select Private Connections, and then, from the drop-down list, select a
    private connection that you previously configured. See Configuring a Private
    Connection.
- Click → (Go to the selected Server or URL).

The **Login** screen is displayed.

5. In **Login**, enter the user name and password for accessing the service, and then click **Sign In**.

# Connecting to a Service Using Financial Reporting Web Studio

You access Financial Reporting Web Studio by selecting a link from the service.

To launch Financial Reporting Web Studio:

- 1. Using a browser, access an environment. See Accessing EPM Cloud.
- Click (Navigator), and then select Reporting Web Studio.



## Working in EPM Cloud Environments

#### In This Section

- Understanding Updates to an Environment and Viewing Readiness Information
- Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility
  - Submitting Feedback Using the Provide Feedback Utility
  - Disabling Feedback Notification

## Understanding Updates to an Environment and Viewing Readiness Information

#### **Monthly Updates to Environments**

Generally, Oracle releases a patch containing bug fixes, code optimization, and feature updates on the first Friday of the month. Oracle applies this patch to the test environment of the service during the next Daily Maintenance window following a patch release. Typically, production environments are patched on the third Friday of the month.

Oracle notifies Service Administrators of the updates included in each patch. For minor patch releases, Oracle typically provides one week advance notification before patching the test environment. For major updates, Oracle provides a two-month advance notification.

#### **Viewing Readiness Information**

A document that provides detailed information about the currently installed service update is posted on the Oracle Cloud Release Readiness website. Information that may be available at this website includes announcements and new features, changes in behavior, and fixed defects.



You can open the Oracle Cloud Release Readiness website directly by going to https://cloud.oracle.com/saas/readiness/overview.

To access readiness information from the service:

- 1. Access an environment. See Accessing EPM Cloud.
- 2. On the Home page, access **Settings and Actions** by clicking your user name at the top right corner of the screen.
- 3. Select About and then Version.



 Click the Oracle Enterprise Performance Management Release Readiness link.

Oracle Cloud Release Readiness website is displayed.

Click Enterprise Performance Management, and then the service type, for example, Planning & Budgeting.

# Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility

You can help Oracle diagnose and resolve issues more efficiently by using the Provide Feedback utility available within your Oracle Enterprise Performance Management Cloud environment.

If you encounter an issue while using the service, use the Provide Feedback utility to describe the issue and the steps to reproduce it. To expedite the resolution of issues, Oracle recommends that you add multiple screenshots to your feedback submissions. Adding a succession of screenshots that show your progress through a task enables you to create a storyboard that shows Oracle how to recreate your issue.

Each time a user submits feedback to Oracle using the Provide Feedback utility, a feedback notification, a subset of the information that a user submits, is sent to Service Administrators and to the user who submits the feedback. These notifications enable Service Administrators to review submitted issues and suggest corrective actions. Feedback notification is enabled by default.

Each Service Administrator can turn off the notification by clicking the **Unsubscribe** link embedded in the email. See <u>Disabling Feedback Notification</u>. Regardless of the subscription status, a notification is always sent to the user who submits the feedback.

For services other than Oracle Enterprise Performance Reporting Cloud: You can also provide feedback (text only) to Oracle using the feedback EPM Automate Utility command if the user interface becomes unresponsive. See "Command Reference" in Working with EPM Automate for Oracle Enterprise Performance Management Cloud for details.

## Submitting Feedback Using the Provide Feedback Utility

Before providing feedback, ensure that you are at the stage in the process when the problem was observed.

#### Note:

Using the Provide Feedback utility to submit diagnostic information sends your submission to Oracle but does not create a service request. If a Service Administrator cannot resolve the issue, then you can create a service request using the information that you submit. While creating the service request, you will be prompted for the reference number, which is displayed on the screen when you submitted diagnostic information using the utility. Additionally, the reference number is included in the feedback notification email. Entering the reference information helps Oracle to easily collect the required diagnostic data.



#### To provide feedback:

- While you are in the screen about which you want to provide feedback, open Setting and Actions by clicking your user name (displayed at the right top corner of the screen), and then select Provide Feedback.
- 2. In Give a brief description, describe the issue that you encountered.
- 3. Optional: Select an option to highlight or darken areas of the screen.
  - Select Highlight, and then click and drag on the screen to highlight portions of the screen; for example, to highlight errors or issues.
  - Select **Darken**, and then click and drag on the screen to hide portions of the screen. Use this option to hide sensitive data from the screenshot.
- 4. Click (Add button) to capture the screenshot.
- 5. Optional: Add additional screenshots:
  - a. Navigate to the new screen that you want to capture.
  - b. Click (Add).
  - **c. Optional:** Select an option to highlight or darken areas of the screen, and then click and drag on the screen to highlight or darken an area.
  - d. Describe your issue or the actions that you performed in the current screen.
  - e. Click Add.
  - f. Repeat this steps to add more screenshots.
- 6. Click Submit.
- 7. Review the browser, environment, and plug-in information. Click (Next) to review screenshots.
- 8. Click Submit.
- 9. Optional: If you need Oracle's assistance to resolve this issue, follow the instructions on the screen to log a service request. While creating the service request, be sure to enter the reference number that is displayed on the screen. The reference number is included in the feedback notification email also.
- 10. Click Close.

## **Disabling Feedback Notification**

By default, Service Administrators get a feedback notification each time a user submits feedback to Oracle. Service Administrators use the information included in the notification to review the issue and suggest corrective actions.

You can unsubscribe from the notification mailing list. If you unsubscribe, feedback notification are disabled for you after the next daily maintenance of the environment. You will, however, continue to receive notification of any feedback that you submit.



If you disable feedback notification, you cannot enable it again.



#### To disable feedback notification:

- 1. Open the feedback notification email (sent by EPM Cloud User Feedback), and then click **Unsubscribe**.
- 2. Sign into the environment if prompted.
- 3. Click Unsubscribe.
- 4. Click Close.



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## **Resolving Connection Issues**

#### Why am I unable to connect to EPM Cloud?

If you can connect to websites outside of your organization's network, but cannot connect to Oracle Enterprise Performance Management Cloud:

- Verify that the connection URL and the credentials you are using are valid.
- Check if you can connect to the service from a different network (a wireless network or outside your organization's network).
- Verify that the browser is configured for EPM Cloud. See:
  - Configuring Internet Explorer
  - Configuring Firefox
- Verify that EPM Cloud and Oracle domains (cloud.oracle.com and oraclecloud.com) are not blacklisted.
- If you are using Virtual Priovate Network (VPN), connect to EPM Cloud without using VPN. If the connection is successful, the issue may be related to your VPN setup or internet proxy settings. Contact your network administrator for help.

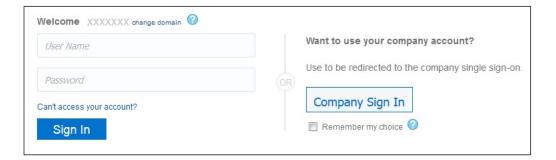
#### Why am I unable to connect to EPM Cloud through VPN?

Connect to EPM Cloud without using VPN to ensure that the EPM Cloud URL and credentials are valid. If you can access the service, connectivity issue may be localized to the following, which requires help from your network administrator:

- Internet proxy setting on your computer
- Your organization's VPN setup

#### I see two sign-in options: which should I use?

In SSO-enabled environments, a sign-in screen similar to the following is displayed for users who are permitted to maintain identity domain credentials; typically, Identity Domain Administrators and Service Administrators who need to use clients such as the EPM Automate Utility.



You should sign in using the **Company Sign In** option to access the service.



#### Can I use vanity URLs to redirect to EPM Cloud?

Vanity URLs are not supported for accessing EPM Cloud.

