# Oracle® Cloud

Getting Started with Oracle Enterprise Performance Management Cloud for Administrators





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

E96235-04

Copyright © 2017, 2018, Oracle and/or its affiliates. All rights reserved.

Primary Author: EPM Information Development Team

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# 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	1-8
Overview of Strategic Workforce Planning	1-9
Setting Up Browsers for EPM Cloud	1-9
Supported Browsers	1-10
Configuring Internet Explorer	1-10
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	1-14
Accessing EPM Cloud	1-14
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	1-18



Managing Users and Roles  About User and Role Management Understanding Predefined Roles  Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a 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  Strategic Workforce Planning  Oracle Enterprise Performance Reporting Cloud  Accessing My Services  Creating Users  Granting Roles to Users  Managing Users  Securing EPM Cloud	3- and 3- 3- 3- 3- 3- 3- 3-1 3-1
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a 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 Strategic Workforce Planning Oracle Enterprise Performance Reporting Cloud Accessing My Services Creating Users Granting Roles to Users	3- and 3- 3- 3- 3- 3- 3- 3-1 3-1
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a 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 Strategic Workforce Planning Oracle Enterprise Performance Reporting Cloud Accessing My Services Creating Users Granting Roles to Users	3- and 3- 3- 3- 3- 3- 3- 3-1 3-1
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a 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 Strategic Workforce Planning Oracle Enterprise Performance Reporting Cloud Accessing My Services Creating Users	3- and 3- 3- 3- 3- 3- 3- 3- 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a 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 Strategic Workforce Planning Oracle Enterprise Performance Reporting Cloud Accessing My Services	3- and 3- 3- 3- 3- 3- 3- 3- 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a 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 Strategic Workforce Planning Oracle Enterprise Performance Reporting Cloud	3- and 3- 3- 3- 3- 3- 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a 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 Strategic Workforce Planning	3- and 3- 3- 3- 3- 3- 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a 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	3- and 3- 3- 3- 3- 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a Budgeting Cloud Oracle Financial Consolidation and Close Cloud Oracle Tax Reporting Cloud Oracle Profitability and Cost Management Cloud Oracle Account Reconciliation Cloud	3- and 3- 3- 3- 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a Budgeting Cloud Oracle Financial Consolidation and Close Cloud Oracle Tax Reporting Cloud Oracle Profitability and Cost Management Cloud	3- and 3- 3- 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a Budgeting Cloud Oracle Financial Consolidation and Close Cloud Oracle Tax Reporting Cloud	3- and 3- 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a Budgeting Cloud Oracle Financial Consolidation and Close Cloud	3- und 3- 3-
About User and Role Management Understanding Predefined Roles Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning a Budgeting Cloud	3- und 3-
About User and Role Management Understanding Predefined Roles	3
About User and Role Management	
Managing Hoors and Dolos	
Connecting to a Service Using Financial Reporting Web Studio	2
Initiating a Connection	2-
Configuring a Private Connection	2
Configuring a Shared Connection	2
Configuring Connections in Smart View	2
URL Syntax for Smart View Connections	2
Connection Types	2
Accessing a Service Using Smart View	2
Downloading and Installing Clients	2
Calculation Manager Requirements	2
Smart View Requirements	2
Prerequisites	2
Available Clients and Utilities	2
Working with EPM Cloud Components	
	1-3
Understanding EPM Cloud Localization	1-2
Oracle Learning Library Understanding EPM Cloud Localization	
· ·	1-



	4-1
Configuring Single Sign-On Between EPM Cloud and Oracle Fusion Cloud	4-3
Configuring Single Sign-On Between EPM Cloud and NetSuite	4-5
Ensuring that Users Can Run EPM Cloud Utilities After Configuring SSO	4-7
Setting up Network Restricted Access	4-7
Relocating an EPM Cloud Environment to a Different Identity Domain	4-8
Considerations	4-8
Preparing to Relocate an environment	4-9
Create Backup of the Environment	4-9
Exporting Users and Roles from the Current Identity Domain	4-10
Scheduling the Daily Maintenance Process	4-10
Completing Relocation Tasks in Oracle Cloud	4-11
Importing Users into the Target Identity Domain and Assigning Roles	4-11
Importing Maintenance Snapshot into the Relocated Environment	4-12
For Services Other Than Oracle Enterprise Performance Reporting Cloud	4-12
For Oracle Enterprise Performance Reporting Cloud Only	4-13
Email Access Details	4-13
Managing Integrated Business Process Navigation Flows	4-13
Backing Up and Restoring an Environment Using the Maint Snapshot	
	enance
Snapshot  Overview of the Maintenance Snapshot	5-1
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud	5-1 5-2
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud  Backing up the Maintenance Snapshot	5-1 5-2 5-2
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud  Backing up the Maintenance Snapshot  Restoring Application Artifacts and Data from a Snapshot	5-1 5-2 5-2 5-3
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud  Backing up the Maintenance Snapshot  Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only	5-1 5-2 5-2 5-3 5-4
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud  Backing up the Maintenance Snapshot  Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only  Saving Backup Snapshots	5-1 5-2 5-2 5-3 5-4 5-4
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud  Backing up the Maintenance Snapshot  Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only	5-1 5-2 5-2 5-3 5-4
Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud Backing up the Maintenance Snapshot Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only Saving Backup Snapshots Restoring from a Backup	5-1 5-2 5-2 5-3 5-4 5-4
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud  Backing up the Maintenance Snapshot  Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only  Saving Backup Snapshots	5-1 5-2 5-2 5-3 5-4 5-4
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud Backing up the Maintenance Snapshot Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only Saving Backup Snapshots Restoring from a Backup  Setting Up EPM Cloud Environments	5-1 5-2 5-3 5-4 5-4 5-5
Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud Backing up the Maintenance Snapshot Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only Saving Backup Snapshots Restoring from a Backup  Setting Up EPM Cloud Environments  Understanding Updates to an Environment and Viewing Readiness Information	5-1 5-2 5-3 5-4 5-4 5-5
Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud Backing up the Maintenance Snapshot Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only Saving Backup Snapshots Restoring from a Backup  Setting Up EPM Cloud Environments  Understanding Updates to an Environment and Viewing Readiness Information Setting Service Maintenance Time	5-1 5-2 5-3 5-4 5-4 5-5
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud     Backing up the Maintenance Snapshot     Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only     Saving Backup Snapshots     Restoring from a Backup  Setting Up EPM Cloud Environments  Understanding Updates to an Environment and Viewing Readiness Information Setting Service Maintenance Time Setting Content Update Start Time	5-1 5-2 5-3 5-4 5-4 5-5
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud Backing up the Maintenance Snapshot Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only Saving Backup Snapshots Restoring from a Backup  Setting Up EPM Cloud Environments  Understanding Updates to an Environment and Viewing Readiness Information Setting Service Maintenance Time Setting Content Update Start Time  Monitoring Your Service	5-1 5-2 5-2 5-3 5-4 5-4 5-5 6-1 6-2 6-3 6-4
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud     Backing up the Maintenance Snapshot     Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only     Saving Backup Snapshots     Restoring from a Backup  Setting Up EPM Cloud Environments  Understanding Updates to an Environment and Viewing Readiness Information Setting Service Maintenance Time  Setting Content Update Start Time  Monitoring Your Service     Using Activity Reports and Access Logs to Monitor Usage	5-1 5-2 5-3 5-4 5-4 5-5 6-1 6-2 6-3 6-4 6-4
Snapshot  Overview of the Maintenance Snapshot  For Services Other Than Oracle Enterprise Performance Reporting Cloud  Backing up the Maintenance Snapshot  Restoring Application Artifacts and Data from a Snapshot  For Oracle Enterprise Performance Reporting Cloud Only  Saving Backup Snapshots  Restoring from a Backup  Setting Up EPM Cloud Environments  Understanding Updates to an Environment and Viewing Readiness Information  Setting Service Maintenance Time  Setting Content Update Start Time  Monitoring Your Service  Using Activity Reports and Access Logs to Monitor Usage  About Activity Report	5-1 5-2 5-2 5-3 5-4 5-4 5-5 6-1 6-2 6-3 6-4 6-4 6-4



	6-18
For Oracle Enterprise Performance Reporting Cloud	6-18
Monitoring Environments Using Oracle Cloud Applications	6-20
Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility	6-21
Submitting Feedback Using the Provide Feedback Utility	6-21
Disabling Feedback Notification	6-23
Rebranding EPM Cloud Environments	6-23
Understanding Encryption Levels and Session Timeout	6-25
Configuring SPF Record for Oracle Cloud Email Verification	6-25
Data to Data Africa to the control of the control o	
	6-2
Tips and Frequently Asked Questions  Resolving Connection Issues	
	7-1
Tips and Frequently Asked Questions  Resolving Connection Issues	6-26 7-1 7-2 7-3
Tips and Frequently Asked Questions  Resolving Connection Issues  Resolving EPM Automate Utility Access Problems	7-1 7-2 7-3
Tips and Frequently Asked Questions  Resolving Connection Issues Resolving EPM Automate Utility Access Problems  Monitoring the Service	7-1 7-2
Tips and Frequently Asked Questions  Resolving Connection Issues Resolving EPM Automate Utility Access Problems  Monitoring the Service  Managing User Accounts	7-1 7-2 7-3 7-5



# **Documentation Accessibility**

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

#### **Access to Oracle Support**

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



## **Documentation Feedback**

To provide feedback on this documentation, send email to epmdoc\_ww@oracle.com, or, in an Oracle Help Center topic, click the Feedback button located beneath the Table of Contents (you may need to scroll down to see the button).

Follow EPM Information Development on these social media sites:

LinkedIn - http://www.linkedin.com/groups?gid=3127051&goback=.gmp\_3127051

Twitter - http://twitter.com/hyperionepminfo

Facebook - http://www.facebook.com/pages/Hyperion-EPM-Info/102682103112642

Google+ - https://plus.google.com/106915048672979407731/ #106915048672979407731/posts

YouTube - https://www.youtube.com/oracleepminthecloud



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
- Understanding the Home Page
- · 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 is a comprehensive global tax provision solution for multinational companies reporting under GAAP (Generally Accepted Accounting Principles) or IFRS (International Finance Reporting Standards). The solution encompasses all stages of the corporate tax provision process, including tax automation, data collection, tax provision calculation, return-to-accrual automation, tax reporting and analysis, and Country by Country (CbCR) reporting.

Oracle Tax Reporting Cloud calculates your company's global tax provision, effective tax rate, and deferred tax for tax provisioning purposes. The application complies with the standards for accounting for income taxes under US GAAP and IFRS.

Oracle Tax Reporting Cloud can use the same platform as your corporate close process and therefore may be directly integrated utilizing the same metadata. As one solution, consolidated pretax income can be reported by legal entity to calculate the consolidated income tax provision. When corporate accounting finalizes the periodend close and all required amounts—such as permanent and temporary differences, tax rates, and foreign exchange rates—Oracle Tax Reporting Cloud automatically calculates the current and deferred income tax provisions by legal entity and by jurisdiction.

From the provision calculation, Oracle Tax Reporting Cloud produces a journal entry and draft income tax financial statement disclosure, complete with supporting schedules. The supporting schedules provide details for the required disclosures in the income tax footnote to the financial statements, including:

- Pretax income by foreign and domestic entities
- Consolidated tax provision by current and deferred tax expense
- Consolidated and statutory effective tax rate reconciliations
- Composition of deferred tax assets, liabilities, and valuation allowance (as required)



## 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

View this video to get an overview 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:

- 1. 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.
- **3.** 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:

- 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.
- 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.
    - 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.



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 Firefox, select **Tools**, and then **Options**.
- 2. 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.
- 3. 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.

#### Note:

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:

- 1. Go to the URL of an Oracle Enterprise Performance Management Cloud environment.
- 2. 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.



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.

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 questions 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:

1. Go to the Oracle Cloud website:

http://cloud.oracle.com

- 2. Click Sign In.
- 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.
- 7. 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.
  - 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:

 $\verb|https://ServiceName-IdentityDomainName-ServiceType.DataCenter.oraclecloud.com/applicationcontext|$ 

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

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

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

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

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

https://example-idDomain-pbcs.doml.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**

The following documents contain information on performing functional administrative tasks for Oracle Enterprise Performance Management Cloud components:

**Table 1-2** Information Sources for Service Administrators

Document Title	Description
Administering Planning for Oracle Planning and Budgeting Cloud	Explains how to create and administer Oracle Planning and Budgeting Cloud applications
Administering Planning for Oracle Enterprise Planning and Budgeting Cloud	Explains how to create and administer Oracle Enterprise Planning and Budgeting Cloud applications
Administering Oracle Financial Consolidation and Close Cloud	Explains how to create and administer Oracle Financial Consolidation and Close Cloud applications
Administering Oracle Tax Reporting Cloud	Explains how to create, configure, and administer Oracle Tax Reporting Cloud applications
Administering Oracle Profitability and Cost Management Cloud	Explains how to create and administer Oracle Profitability and Cost Management Cloud applications
Setting Up and Configuring Oracle Account Reconciliation Cloud	Explains how to set up and configure the account reconciliation process in EPM Cloud
Administering and Working with Oracle Strategic Workforce Planning Cloud	Details how to configure and administer Oracle Strategic Workforce Planning Cloud and complete tasks.
Administering Oracle Account Reconciliation Cloud	Contains information on administering account reconciliation compliance and transaction matching in EPM Cloud
Administering Oracle Enterprise Performance Reporting Cloud	Explains how to administer Oracle Enterprise Performance Reporting Cloud



Table 1-2 (Cont.) Information Sources for Service Administrators

Document Title	Description
Designing with Management Reporting for Oracle Enterprise Performance Reporting Cloud	Explains how to administer Management Reporting to create financial and managerial reports
Working with Applications, Models, and Dimensions for Oracle Enterprise Performance Reporting Cloud	Explains how to set up and administer Oracle Enterprise Performance Reporting Cloud applications
Working with EPM Automate for Oracle Enterprise Performance Management Cloud	Contains information about the EPM Automate Utility, which helps you automate many EPM Cloud administrative tasks
Administering Access Control for Oracle Enterprise Performance Management Cloud	Contains information about using Access Control to manage user groups and generate various reports to understand service usage
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.
Administering Migration for Oracle Enterprise Performance Management Cloud	Contains information about using Migration to perform administrative tasks on artifacts and to generate reports that identify artifact changes that have taken place over a period
Working with Financial Reporting for Oracle Enterprise Performance Management Cloud	Contains information on administering Financial Reporting to support EPM Cloud components
Administering Oracle Enterprise Data Management Cloud	Contains information on administering Data Management to support the loading of data from source systems and files into EPM Cloud

## 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.



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**

Availability of Oracle Enterprise Performance Management Cloud clients and utilities depends on the current environment. For example, Oracle Smart View for Office and Financial Reporting do not apply to all services.

You can download the following EPM Cloud components, utilities, and templates.

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

#### All Available Clients and Utilities

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

EPM Automate Utility

The EPM Automate Utility allows Service Administrators to access environments over a command window to automate business activities such as exporting an 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.

#### Smart View

Smart View provides a common Microsoft Office interface designed specifically for EPM Cloud. These service-specific extensions are available:

#### Planning Extensions

Planning Extensions include Smart View Admin Extensions and Planning application templates, which facilitate application administration activities, such as dimension management, 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 in Oracle Enterprise Performance Reporting Cloud, 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 auto tagging from within Microsoft Excel as part of as part of Oracle Enterprise Performance Reporting Cloud Disclosure Management.

#### Strategic Modeling

Strategic Modeling is an add-on to Smart View that enables users to interact with the Strategic Modeling Oracle Enterprise Planning and Budgeting Cloud 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 Cloud environments over a command window to automate business activities.

#### Sample Content

Provides sample Oracle Enterprise Planning and Budgeting Cloud report packages, management reports, dimension and data load files, and a sample application.



# Clients for Oracle Planning and Budgeting Cloud and Oracle Enterprise Planning and Budgeting Cloud

- EPM Automate Utility
- Smart View
- Planning Extensions
- Predictive Planning
- Strategic Modeling (for Oracle Enterprise Planning and Budgeting Cloud only)

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

- EPM Automate Utility
- Smart View
- Smart View Add-On for Administrator
- Smart View Extension for Close and Supplemental Data Management

#### Clients for Oracle Profitability and Cost Management Cloud

- EPM Automate Utility
- Smart View

#### **Clients for Oracle Account Reconciliation Cloud**

**EPM Automate Utility** 

#### **Clients for Oracle Enterprise Data Management Cloud**

**EPM Automate Utility** 

#### **Clients for Strategic Workforce Planning**

- EPM Automate Utility
- Smart View
- Planning Extensions
- Predictive Planning

#### **Clients for 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:

- Sign in to an environment. See Accessing EPM Cloud.
- 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:

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.dom1.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:

- 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**.
- 4. 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.
- **10.** 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:

- 1. Start Microsoft Excel.
- 2. Click Smart View, and then Panel.
- Click the arrow next to (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:

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



# Managing Users and Roles

#### In This Section:

- About User and Role Management
- Understanding Predefined Roles
  - Oracle Planning and Budgeting Cloud and 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
  - Strategic Workforce Planning
  - Oracle Enterprise Data Management Cloud
  - Oracle Enterprise Performance Reporting Cloud
- Accessing My Services
- Creating Users
- Granting Roles to Users
- Managing Users

# About User and Role Management

The service implements several security layers. Infrastructure security components, which are implemented and managed by Oracle, create a highly secure service environment.

The service ensures security using the following mechanisms that permit only authorized users to access the service.

- Single Sign-On (SSO)
- Role-based access to environments

SSO and role-based security are controlled by Oracle Identity Management, which defines a security domain for each environment. After a successful signin, access to the service is determined by the role assigned to the user.

#### **Identity Domain**

An identity domain controls the accounts of users who need access to environments. It also controls the features that authorized users can access. An Identity Domain Administrator creates and manages user accounts within an identity domain. The Account Administrator, while activating the service, identifies a user who is granted the Identity Domain Administrator role.



By default, each customer is allocated two environments (test and production environments) of a service. The Identity Domain Administrator uses the My Services application to manage the users who need access to these environments.

Many Oracle Enterprise Performance Management Cloud services may belong to one identity domain.

#### Users

Each user who needs to access an environment must have an account in the identity domain associated with the environment. The roles granted to the user determine what the user can do within an environment.

#### **Roles**

Roles link users to the business activities that they are permitted to perform within an environment and the data that they can access.

Users must be assigned to predefined roles that grant them access to business functions and associated data. Predefined service roles are described in Understanding Predefined Roles.

# **Understanding Predefined Roles**

Access to environments is granted by assigning users to roles. For example, to permit user John Doe to view reports belonging to a Planning and Budgeting test environment, he should be assigned to the Viewer role of the environment.

All Oracle Enterprise Performance Management Cloud services other than Oracle Enterprise Performance Reporting Cloud and Oracle Enterprise Data Management Cloud use a common set of four predefined functional roles to control access to service environments:

- Service Administrator
- Power User
- User
- Viewer

#### Note:

- To create unique role names that distinguish the roles belonging to an environment, Oracle Identity Management prepends the environment name to roles; for example, myservice Viewer, where myservice is the environment name.
- Roles belonging to a test environment are distinguished by appending test to the service name; for example, myservice-test User.

The access that a predefined role grants within an environment depends on the service type. For example, the Power User role in Oracle Planning and Budgeting Cloud enables you to manage business rule security and control the approval process



while the same role in Oracle Tax Reporting Cloud enables you to run tax automation and import data.

Predefined functional service roles are hierarchical. Access granted through lower-level roles is inherited by higher-level roles. For example, Service Administrators, in addition to the access that only they have, inherit the access granted through Power User, User, and Viewer roles.

#### **About the Identity Domain Administrator Role**

In addition to the functional roles, all EPM Cloud services use the Identity Domain Administrator role to manage users.

Identity Domain Administrators use the Security Page of My Services to perform all identity domain management tasks such as managing users and their roles, configuring single sign-on, and setting up network restricted access.

See the Identity Domain Administrator role description in *Getting Started with Oracle Cloud* for a detailed description of this role.

Identity Domain Administrator is not a functional role; it does not inherit access privileges granted through functional roles. To access service features, the Identity Domain Administrator must be granted one of the four functional roles.



An Identity Domain Administrator manages both the test and production environments of all services belonging to an identity domain.

An Identity Domain Administrator can create other Identity Domain Administrators, who can share the administrative workload. Having multiple Identity Domain Administrators also ensures seamless operation in case an Identity Domain Administrator becomes unavailable.

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

#### **Service Administrator**

Performs all Oracle Planning and Budgeting Cloud or Oracle Enterprise Planning and Budgeting Cloud functional activities, including granting roles to users. This role should be granted to functional experts who need to create and administer Planning or Oracle Enterprise Planning and Budgeting Cloud business processes and service components.

#### **Power User**

Views and interacts with data. This role grants high-level access to several functional areas within an environment and should be granted to department heads and business unit managers, and business users in charge of a region who need to control the approval process.

A Power User can perform these activities:



- Creates and maintains forms, Oracle Smart View for Office worksheets, and Financial Reporting reports
- Manages business rules security, but cannot create rules
- Creates and manages user variables for the application, but cannot delete them.
- Views substitution variables
- Controls the approvals process, performs actions on approval units to which they
  have write access, and assigns owners and reviewers for the organization under
  her charge
- Creates reports using Financial Reporting, accesses the repository to create folders and save artifacts
- Loads data using forms and Data Management

#### User



The User role was created by renaming the Planner role. If your service was provisioned after May, 2016, you will see the User role and not the Planner role.

- Enters data into forms and submits them for approval, analyzes forms using ad hoc features, controls the ability to drill through to the source system
- Accesses and modifies Financial Reporting content stored in the Repository for which the user has View, Modify, or Full Control permissions.

#### Viewer

Views and analyzes data through forms and data access tools. Typically, this role should be assigned to executives who need to view business plans during the budgeting process.

### Oracle Financial Consolidation and Close Cloud

#### **Service Administrator**

Performs all Oracle Financial Consolidation and Close Cloud functional activities, including granting roles to users.

This role should be granted to Oracle Financial Consolidation and Close Cloud experts who need to create and administer the Consolidation application and service components.

#### **Power User**

Views and interacts with data. This role grants high-level access to several Oracle Financial Consolidation and Close Cloud functional areas and should be granted, typically, to the consolidation experts and regional senior financial analysts of your organization.

A Power User can perform these activities:



- Creates and maintains forms, Oracle Smart View for Office worksheets, business rules, task lists, and Financial Reporting reports
- Consolidates data as needed for entities to which they have access
- Controls the approvals process, performs actions on consolidation units and journals to which they have modify access, and assigns owners and reviewers for the organization under their charge
- Imports data into Oracle Financial Consolidation and Close Cloud
- Creates and saves Smart Slices



Anyone other than a user with the Viewer role can become an owner or reviewer.

#### User

- Enters and submits data for approval, analyzes forms using ad hoc features, and controls the ability to drill through to the source system. Creates and submits for approval the journals for dimension members for which they have Modify rights
- Accesses Data Management (to create an integration, run an integration, and drill through) and loads data if an application role that grants such access is granted to the user

#### Viewer

Views and analyzes data through forms and any data access tools such as reports, smart slices, journals, and ad hoc grids. This role typically should be assigned to executives who need to view consolidation and close reports.

## Oracle Tax Reporting Cloud

#### **Service Administrator**

Performs all functional activities (read, write, and update) in Oracle Tax Reporting Cloud, including metadata and data, for all entities or a specific group or entity. This role also performs tax automation.

This role should be granted to Oracle Tax Reporting Cloud experts who need to create and administer the application and service components.

#### **Power User**

Reads and writes to the application, runs tax automation, and imports data for the assigned entities.

#### User

Reads, writes, and updates only tax-related forms for the assigned entities. Also, enters and submits data for approval, analyzes forms, consolidates data, and creates and submits journals for dimension members to which they have access. This role cannot perform tax automation.



#### Viewer

Views reports and has read-only access to specified forms to view and analyze data through forms and any data access tools. Data Access tools include reports and ad hoc grids. This access is usually assigned to reviewers, directors, executives, and so on.

## Oracle Profitability and Cost Management Cloud

#### Service Administrator

Performs all functional activities in an environment.

This role should be granted to functional experts who need to create and administer Oracle Profitability and Cost Management Cloud application and service components.

#### **Power User**

Views and interacts with data. This role grants high-level access to several functional areas within an environment and should be granted to department heads and business unit managers, and business users in charge of a region who need to control the approval process.

A Power User can perform activities including the following:

- Adds allocation rules, analytical features, financial reports, and queries
- Imports and exports data
- Calculates application models
- Updates metadata and performs all application management tasks except creation and deletion

#### User

- Enters data where user input is requested
- Runs analytical tools and reports
- Designs reports, queries, dashboards, and other analytical elements

#### Viewer

Views and analyzes data but does not have write access

## **Oracle Account Reconciliation Cloud**

#### **Service Administrator**

Configures the system and manages the worldwide reconciliation process. These users have unrestricted access to all Oracle Account Reconciliation Cloud features including the ability to view all reconciliations.

#### **Power User**

Adds and maintains profiles and creates reconciliations from those profiles, but only if the profiles fall within the user's security filter. A Service Administrator defines security



filters from the **System Settings** configuration tab of the Oracle Account Reconciliation Cloud environment.

Generally, this role is assigned to users who have regional reconciliation management responsibilities.



Power Users can administer authorized sets of profiles and reconciliations in Oracle Account Reconciliation Cloud. This feature is designed for companies with distributed reconciliation processes that require participation of employees familiar with configuring profiles and reconciliations locally. Authorization of profiles and reconciliations occurs through security filters on account segments. For example, Power User A might be granted authorization only to profiles or reconciliations where segment one = 100 and segment two starts with 12. Security filters are created and assigned to each Power User.

#### User

Prepares and reviews account reconciliations or views or comments on reconciliations. Access to reconciliations is controlled by the assignment of the user to the reconciliation. For example, in order to prepare a given reconciliation, the user must be assigned the Preparer role for that reconciliation.

Typically, this role is granted to preparers, reviewers, and commentators on reconciliations.

#### Viewer

Views reconciliations.

## Oracle Enterprise Data Management Cloud

#### **Service Administrator**

Performs all Oracle Enterprise Data Management Cloud functional activities such as creating applications, views and updating data. Performs administrative tasks including granting functional roles to users, migrating artifacts across test and production environments, and performing daily maintenance.

This role should be granted to functional experts who need to create and administer Oracle Enterprise Data Management Cloud applications and data.

#### User

Views data chains, but cannot update them. A user in Oracle Enterprise Data Management Cloud can be assigned roles to create views and applications and assigned permissions to work with applications, views and data chains.



## Strategic Workforce Planning

#### Service Administrator

Performs all Oracle Strategic Workforce Planning Cloud functional activities, including granting roles to users.

This role should be granted to functional experts who need to create and administer Strategic Workforce Planning components.

#### **Power User**

Views and interacts with data. This role grants high-level access to several functional areas within an environment and should be granted to department heads and business unit managers, and business users in charge of a region who need to control the approval process.

A Power User can perform these activities:

- Creates and maintains forms, Oracle Smart View for Office worksheets, task lists, and Financial Reporting reports
- Manages business rules security, but cannot create rules
- Creates and manages user variables for the application, but cannot delete them.
- Views substitution variables
- Controls the approvals process, performs actions on approval units to which they
  have write access, and assigns owners and reviewers for the organization under
  her charge
- Creates reports using Financial Reporting, accesses the repository to create folders and save artifacts

#### User

- Enters data into forms and submits them for approval, analyzes forms using ad hoc features, controls the ability to drill through to the source system
- Accesses and modifies Financial Reporting content stored in the Repository for which the user has View, Modify, or Full Control permissions.
- Accesses Data Management and loads data

#### Viewer

Views and analyzes data through forms and data access tools. Typically, this role should be assigned to executives who need to view business plans during the budgeting process.

## Oracle Enterprise Performance Reporting Cloud

#### **Service Administrator**

Creates and maintains all aspects of the service, except for user management.

#### **Reports Administrator**

Creates report packages and management reporting definitions.



#### **Application Administrator**

Creates and maintains all artifacts, such as applications, models, dimensions, and data grants.

#### **Library Administrator**

Creates folders, including root-level folders.

#### User

Views artifacts to which the user has access. This is the minimum role required to sign in to and use an environment.

# Creating Custom Roles (Groups) for Oracle Enterprise Performance Reporting Cloud

Oracle Enterprise Performance Reporting Cloud uses custom identity domain roles to facilitate access control on artifacts such as report packages. Custom roles are exposed in Oracle Enterprise Performance Reporting Cloud as groups that can be used as a convenient way to establish artifact access to multiple users at once.

Do not use custom identity domain roles to provide access to an environment. They can only be used to group users who share identical needs.

Identity Domain Administrators create and manage custom roles. See Managing Custom Roles in Managing and Monitoring Oracle Cloud for detailed instructions.

# **Accessing My Services**

The Identity Domain Administrator uses My Services to complete tasks such as the following:

- Set up single sign-on
- Create and manage users
- Manage and monitor Oracle Enterprise Performance Management Cloud account
- Set up network restricted access (whitelists/blacklists)
- Consolidate identity domains

If you are the Identity Domain Administrator for multiple environments, you must sign in to My Services using the Identity Domain Administrator credentials applicable to the identity domain associated with the environment.

To access My Services:

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.
- Enter your identity domain and click Go.



- 6. Enter your Oracle account credentials (user name and password).
- 7. Click Sign In.

## **Creating Users**

The Identity Domain Administrator can create users individually or use an upload file containing user data to create many users at once.

Identity Domain Administrators are expected to possess these skills:

- Proficiency in security concepts, including the pre-defined Oracle Enterprise Performance Management Cloud roles that allow users to gain access to an environment.
- Know how to use My Services to complete tasks.

By default, Oracle Cloud administrator (oraclecloudadmin\_ww@oracle.com) sends an email to each new user. The email contains the credentials (user name and a temporary password) that the user needs to sign into the environment.



User names must contain only ASCII characters.

Use these information sources:

- To create one user and assign roles, see "Creating a User and Assigning a Role" in Getting Started with Oracle Cloud.
- To create many users using an input file, see "Importing a Batch of User Accounts" in Getting Started with Oracle Cloud.
- To generate a Comma Separated Value (CSV) file that identifies the users in an identity domain, use the Export button on the Users tab of My Services.

# **Granting Roles to Users**

Use the information in this section to grant predefined roles to users if you did not assign a role while creating the user; for example, by uploading user information from a CSV file.

To grant predefined roles to many users at once, you use role upload files, one for each role. Create role upload files by dividing the users in the user upload file among comma-separated value files, one for each role. Each file must contain the email address of the users to whom you want to grant a specific role.

See Understanding Predefined Roles for detailed information on Oracle Enterprise Performance Management Cloud roles.

For detailed steps, see these sections in *Getting Started with Oracle Cloud*:

- Creating a User and Assigning a Role
- Assigning One Role to Many Users



#### Note:

After granting roles, a Service Administrator should email the URLs to access the test and production environments of the service to provisioned users.

Generally, you use different URLs to access the test and production environments of the service. Be sure to include the appropriate URL in the email.

# **Managing Users**

#### Revoking a Role Grant

The Service Administrator, by revoking a role granted to a user, denies access that was previously granted to the user. You revoke a role by modifying the roles assigned to the user.

#### **Deleting Users**

Only an Identity Domain Administrator can delete a user account.

See "Removing a User Account" in Managing and Monitoring Oracle Cloud.

#### **Creating Groups for Application-Level Provisioning**

The following Oracle Enterprise Performance Management Cloud applications allow you to create groups. You can assign identity domain users or other groups as children of a group.

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

Group information is maintained independently by each environment. For information on creating groups and managing application-level provisioning, see *Administering Access Control for Oracle Enterprise Performance Management Cloud*.



4

# Securing EPM Cloud

#### In This Section:

- Configuring Single Sign-On
  - Setting up Single Sign-on Using Oracle Identity Cloud Service
  - Configuring Single Sign-On Between EPM Cloud and Oracle Fusion Cloud
  - Configuring Single Sign-On Between EPM Cloud and NetSuite
- Setting up Network Restricted Access
- Relocating an EPM Cloud Environment to a Different Identity Domain
  - Considerations
  - Preparing to Relocate an environment
  - Scheduling the Daily Maintenance Process
  - Completing Relocation Tasks in Oracle Cloud
  - Importing Users into the Target Identity Domain and Assigning Roles
  - Importing Maintenance Snapshot into the Relocated Environment
  - Email Access Details
- Managing Integrated Business Process Navigation Flows

# Configuring Single Sign-On

Single Sign-On (SSO) enables users belonging to a Security Assertion Markup Language 2 (SAML2) compliant identity provider to authenticate for multiple cloud services offered by Oracle. Users use the SSO credentials that they use to access network resources of their organization to authenticate once to an Oracle Enterprise Performance Management Cloud environment, and then seamlessly access other cloud environments configured using the same identity provider.

You may use any SAML2.0 identity provider, for example, Oracle Identity Federation, Microsoft Active Directory Federation Services 2.0+, Okta, Ping Identity PingFederate, and Shibboleth Identity Provider, to establish SSO.

Oracle Fusion Cloud can be configured with Oracle Identity Federation as the identity provider. Similarly, Oracle NetSuite can be configured to use a SAML2 compliant identity provider. Additionally, you can integrate EPM Cloud with Oracle Identity Cloud Service to provide SSO access to many Oracle cloud environments.

See "Managing Oracle Single Sign-On" in *Administering Oracle Cloud Identity Management* for information on how users can access multiple Oracle Cloud services using one set of credentials.

Setting up Single Sign-on Using Oracle Identity Cloud Service

Oracle Identity Cloud Service, a comprehensive cloud-based identity management and security platform, supports a universal set of access controls, permissions, and password security constraints.

Activity flow in this SSO scenario:

- From a new browser session, a user accesses a Oracle Enterprise Performance Management Cloud environment URL. Oracle Identity Cloud Service signin screen is displayed.
- 2. The user enters an Oracle Identity Cloud Service user name and password.
- 3. Oracle Identity Cloud Service authenticates the user. The EPM Cloud environment that the user requested is displayed. Access within the environment is determined by the service role assigned to the user.
- 4. The user navigates to another environment that uses the same identity domain. Because the user is already authenticated, the requested environment is displayed without challenging the user for credentials.

For step-by-step instructions on configuring SSO using Oracle Identity Cloud Service, see Configuring Single Sign-On for Oracle Enterprise Performance Management Cloud.

#### **Prerequisites**

- A subscription to Oracle Identity Cloud Service.
- Users who need SSO access were created in Oracle Identity Cloud Service.
- Users who need SSO access were created and provisioned in the identity domains being configured for SSO.

For detailed instructions to create and provision users, see "Adding Users and Assigning Roles" in *Getting Started with Oracle Cloud*.

#### **Configuration Steps**

#### Tasks to complete in Oracle Identity Cloud Service



Use Oracle Identity Cloud Service documentation to complete these steps.

For each EPM Cloud service for which you want to set up SSO, complete these actions:

 Add the EPM Cloud service as a SAML application. Application links in the Oracle Identity Cloud Service SAML application should point to the test or production environment of a service. For example, create a SAML application for Oracle Planning and Budgeting Cloud with an application link to its test or production environment.

If multiple environments share the same identity domain, you can create them as one SAML application or create a SAML application for each environment. Creating a SAML application for each environment allows you to invoke individual EPM Cloud environments.

Complete these steps while creating each application:



Configure the SAML application for SSO.

The entity id and assertion consumer URL must specify the identity domain for which SSO is being configured.

- Download Oracle Identity Cloud Service application metadata and store it in a secure location. You will need to load this metadata into EPM Cloud while configuring the identity domain for SSO.
- Assign users to the SAML application.
- Activate the SAML application.
- Import the signing certificates of the identity domain referenced by SAML applications.

The signing certificate is generated from the identity domain that EPM Cloud service uses.

#### Tasks to complete in EPM Cloud

For each identity domain that supports SSO, complete these actions:

 Create Oracle Identity Cloud Service users as users in each identity domain and provision them.

The Identity Domain Administrator can create users individually or use an upload file containing user data to create many users at once. See these topics in *Getting Started with Oracle Cloud*:

- Creating a User and Assigning a Role
- Importing a Batch of User Accounts

Users who need to work with EPM Cloud client components; for example, EPM Automate Utility, must be configured to maintain identity domain credentials. See Ensuring that Users Can Run EPM Cloud Utilities After Configuring SSO.

Enable SSO in EPM Cloud.

See "Managing Oracle Single Sign-On" in Administering Oracle Cloud Identity Management.

- Import the metadata of the Oracle Identity Cloud Service SAML application into the identity domain.
- Export the signing certificate of the identity domain by selecting Signing
   Certificate from the drop-down list in the Configure your Identity Provider
   Information section.

You must import the signing certificate into Oracle Identity Cloud Service.

- Test the SSO configuration.
- Start SSO.
- Test SSO configuration by accessing EPM Cloud environments.

# Configuring Single Sign-On Between EPM Cloud and Oracle Fusion Cloud

Use the information in this section to establish SSO between Oracle Enterprise Performance Management Cloud and Oracle Fusion Cloud deployments that use Oracle Identity Federation as the identity provider.



For step-by-step instructions on configuring SSO between EPM Cloud and Oracle Fusion Cloud, see "Configuring Single Sign-On Between EPM Cloud and Oracle Fusion Cloud" in Configuring Single Sign-On for Oracle Enterprise Performance Management Cloud.

#### Note:

To establish SSO between Oracle Strategic Workforce Planning Cloud and Oracle Human Capital Management Cloud, use an SSO Federation (SAML 2) server that is approved for use with Fusion Cloud (many major ones are). An additional fee may be incurred if you use an uncertified server. See "Non-Certified Federation Server SSO Enablement for Oracle Fusion Cloud Service Setup Fee" in Oracle Fusion Service Descriptions for a list of SAML2 providers that are certified for Oracle HCM Cloud.

#### **Prerequisites**

- The identity provider must be SAML2 compliant (if you are using your own identity provider).
- User accounts must exist in the Oracle Fusion Cloud identity store and the EPM Cloud identity domain. Both must be configured for SSO.

If you use an identity provider such as Okta, instead of the Oracle Identity Federation of Oracle Fusion Cloud, you must configure your users in the identity provider as well.

#### **Configuration Steps**

Open a service request with Oracle Support to configure Oracle Identity
Federation as the identity provider for SSO with Oracle Fusion Cloud. Oracle
imports the required metadata to enable Oracle Fusion Cloud to work with Oracle
Identity Federation.

#### Note:

Be sure to provide the metadata of your identity provider in the service request if you are not using the Oracle Identity Federation of Oracle Fusion Cloud as the identity provider. In this scenario, Oracle will provide the metadata of Oracle Fusion Cloud service provider to your identity provider administrator to import it into your identity provider.

- In the Oracle Identity Federation that supports Oracle Fusion Cloud, or in the identity provider that you are using, create an account for each user who needs SSO access to Oracle Fusion Cloud.
  - You can create users by importing user details from a file or by accessing the Oracle Identity Management (OIM) console of the Oracle Identity Federation that supports Oracle Fusion Cloud. See Oracle Fusion Cloud documentation for information on creating users.
- Enable SSO in EPM Cloud.



See "Managing Oracle Single Sign-On "in Administering Oracle Cloud Identity Management.

• In the identity domain that supports the EPM Cloud environment, create and provision an account for each user who needs SSO access to EPM Cloud.

The Identity Domain Administrator can create users individually or use an upload file containing user data to create many users at once. See these topics in *Getting Started with Oracle Cloud*:

- Creating a User and Assigning a Role
- Importing a Batch of User Accounts

Users who need to work with EPM Cloud client components; for example, EPM Automate Utility, must be configured to maintain identity domain credentials. See Ensuring that Users Can Run EPM Cloud Utilities After Configuring SSO.

 Test SSO configuration by accessing Oracle Fusion Cloud and then navigating to EPM Cloud, and vice versa.

## Configuring Single Sign-On Between EPM Cloud and NetSuite

Use the information in this section to establish SSO between Oracle Enterprise Performance Management Cloud and NetSuite deployments using user identities stored in an identity provider such as Okta.



The procedures in this section have been tested using Okta as the identity provider that stores user identities. You can use any SAML 2.0 compliant identity provider to enable SSO.

SSO access between NetSuite and EPM Cloud is permitted only for users who have accounts in the user directories of NetSuite, Okta, and EPM Cloud identity domain.

For step-by-step instructions on configuring SSO between EPM Cloud and Oracle Fusion Cloud, see "Configuring Single Sign-On Between EPM Cloud and NetSuite" in Configuring Single Sign-On for Oracle Enterprise Performance Management Cloud.

#### **Prerequisites**

- All users of NetSuite and EPM Cloud are available in the SAML 2.0 compliant identity provider that you are using.
- EPM Cloud users who need SSO access were created and provisioned in the identity domain that services EPM Cloud. For detailed instructions to create and provision users, see "Adding Users and Assigning Roles" in Getting Started with Oracle Cloud.

After enabling SSO, all EPM Cloud users will be able to navigate to NetSuite without being challenged for credentials. For these users, functional access is controlled by NetSuite roles and permissions.

 Users who need SSO access have been created and provisioned in NetSuite. For detailed information, see NetSuite documentation.



After enabling SSO, only the users in NetSuite who have been granted a NetSuite role that assigns SAML Single Sign-on access will be able to navigate to EPM Cloud without going through an additional sign in process.

Before starting the SSO configuration process, make sure that all users who need SSO access to EPM Cloud can access and work in NetSuite.

#### **Configuration Steps**

#### Tasks to complete in the Identity Provider (for example, Okta)



Use the documentation of the identity provider to complete these steps.

- Create and activate users who need SSO access between NetSuite and EPM Cloud resources as users in your organization's identity provider.
- Add NetSuite as an application, and provision the users who can use SSO.
- Add EPM Cloud as an application, and provision the users who can use SSO.

#### Tasks to complete in NetSuite



Use NetSuite documentation to complete these steps.

- Configure and enable SAML SSO.
  - For Okta-specific instructions, see How to Configure SAML 2.0 for Netsuite.
- Create a SAML role that allow users to perform SAML SSO.
- Provision NetSuite users with the SAML role.
- Import the identity provider's (for example, Okta's) metadata file. You created this file as a part of creating the NetSuite application in Okta.

#### Tasks to complete in EPM Cloud

- Enable SSO in EPM Cloud.
  - See "Managing Oracle Single Sign-On" in *Administering Oracle Cloud Identity Management.*
- In the identity domain that supports the EPM Cloud environment, create and provision an account for each user who needs SSO access to NetSuite.
  - The Identity Domain Administrator can create users individually or use an upload file containing user data to create many users at once. See these topics in *Getting Started with Oracle Cloud*:
  - Creating a User and Assigning a Role
  - Importing a Batch of User Accounts



Users who need to work with EPM Cloud client components; for example, EPM Automate Utility, must be configured to maintain identity domain credentials. See Ensuring that Users Can Run EPM Cloud Utilities After Configuring SSO.

 Test SSO configuration by accessing NetSuite and then navigating to EPM Cloud, and vice versa.

# Ensuring that Users Can Run EPM Cloud Utilities After Configuring SSO

Some Oracle Enterprise Performance Management Cloud client components; for example, EPM Automate Utility, do not work with the SSO credentials that you use to access your organization's network resources.

In SSO-enabled environments, the accounts of all users, generally Service Administrators and Oracle Account Reconciliation Cloud Power Users, who need to work with EPM Cloud utilities, must be configured to maintain identity domain credentials. Identity Domain Administrators, while creating a user account in My Services, may select the **Maintain Identity Domain Credentials** to enable a user to maintain identity domain credentials.



Users whose accounts are configured to maintain identity domain credentials will see two sign-in options—Company Sign In and Traditional Cloud Account Sign In—when you use a browser to access an environment. All other users will see only the Company Sign In option.

To modify a user account to maintain identity domain credentials:

- Sign in to My Services as an Identity Domain Administrator. See Accessing My Services for instructions.
- 2. Click Users.
- 3. Click **Action** next to the user whose account is to be modified to maintain identity domain credentials, and then select **Modify**.
- Select Maintain Identity Domain Credentials.
- 5. Click Save.

## Setting up Network Restricted Access

Identity Domain Administrators and Service Administrators, by configuring a whitelist or a blacklist, can control whether Internet Protocol (IP) addresses belonging to a network can connect to an environment. A whitelist contains rules that define which IP addresses can access an environment while a blacklist contains rules that exclude IP addresses from connecting to an environment.

You use the Service Details screen of My Services to create whitelist or blacklist rules to regulate how users access an environment. While creating rules, the Domain Administrator or Service Administrator identifies individual IP addresses, a range of IP



address, subnets/masks, or Classless Inter-Domain Routing (CIDR) to identify the addresses that are allowed or denied access to the environment.

See "Managing Internet Protocol Whitelist and Blacklist Rules" in *Managing and Monitoring Oracle Cloud*.

# Relocating an EPM Cloud Environment to a Different Identity Domain

#### **Related Topics**

- Considerations
- Preparing to Relocate an environment
- Scheduling the Daily Maintenance Process
- Completing Relocation Tasks in Oracle Cloud
- Importing Users into the Target Identity Domain and Assigning Roles
- Importing Maintenance Snapshot into the Relocated Environment
- Email Access Details

### Considerations

- You can relocate an environment only if it was provisioned after May 1, 2016.
   Environments that were provisioned prior to this date cannot be relocated into another identity domain.
- You cannot relocate environments ordered with Hosted Named Users incremented over time, where the total number of Hosted Named User licenses has not yet been reached. Refer to your Order Documents for detailed information.
- Oracle Cloud Account Administrators may relocate an environment from its current identity domain to another if the target identity domain is provisioned for the same customer account and is in the same data center.
- Account Administrators can relocate an environment to a target identity domain even if the target identity domain already hosts an environment with the same service name. In such cases, you are prompted to rename the environment that you are relocating to ensure that the environment name is unique within the target identity domain. Account Administrator role is not the same as the Identity Domain Administrator role of the service.

Only an user who is the Account Administrator in both the source and target domains can relocate an environment.



If you are relocating a test environment, you must append <code>-test</code> to the environment name in the target identity domain; for example, <code>new\_env-test</code>. If you do not appropriately name your migrated test environments, the monthly update cycle will be disrupted.



- Account Administrators cannot create an identity domain as a part of the relocation process.
- It is possible to initially relocate only the test or production environment of a service into a target identity domain. Oracle recommends that you first relocate the test environment to the target identity domain and test to ensure that everything works as expected before relocating the production environment.

Relocation procedures are to be performed separately for the test and production environments.

You must relocate the production environment to the same target identity domain soon after relocating the test environment so that they share the target domain. You cannot relocate environments so as to consolidate test environments of many services into one identity domain and production environments into a different domain.

#### Note:

After relocating an environment, be sure to update information such as identity domain name, environment URL, and user password in batch files or scripts that you use to perform routine maintenance tasks.

A relocated environment cannot be reverted to the original identity domain.

## Preparing to Relocate an environment

You prepare to relocate an environment by completing these tasks:

- Create Backup of the Environment
- Exporting Users and Roles from the Current Identity Domain for Oracle Enterprise Performance Reporting Cloud only

## Create Backup of the Environment

Service Administrators can back up the environment by downloading the maintenance snapshot from the environment to a local folder.

If users modified data or artifacts after the last maintenance window, Service Administrators should perform the appropriate export operations and then download the resulting snapshot to a local folder. You can upload and import the saved snapshot into the relocated environment.

#### For Services Other Than Oracle Enterprise Performance Reporting Cloud

See Backing Up the Maintenance Snapshot for instructions to download the maintenance snapshot.

Use these steps to back up an environment.

- Create a snapshot using these information sources:
  - exportsnapshot command in Working with EPM Automate for Oracle Enterprise Performance Management Cloud



Relocating an EPM Cloud Environment to a Different Identity Domain

- Exporting Artifacts in Administering Migration for Oracle Enterprise Performance Management Cloud
- Download snapshots using these information sources:
  - downloadfile command in Working with EPM Automate for Oracle Enterprise Performance Management Cloud
  - Downloading Snapshots from the Service in Administering Migration for Oracle Enterprise Performance Management Cloud

#### For Oracle Enterprise Performance Reporting Cloud

Use the <code>download\_dbsnapshot</code> File Transfer Utility command to download the backup snapshot to a local computer. See "Using the File Transfer Utility" in *Administering Oracle Enterprise Performance Reporting Cloud*.

### Exporting Users and Roles from the Current Identity Domain



This step is required for Oracle Enterprise Performance Reporting Cloud only.

Identity Domain Administrators use My Services to export users from the current identity domain.

To export user information:

- Sign in to My Services as an Identity Domain Administrator. See Accessing My Services for instructions.
- 2. Click Users.
- 3. Ensure that **All Roles** is selected as the **Show** filter.
- 4. Click Export.
- 5. Save users.csv in a folder on a local computer.

## Scheduling the Daily Maintenance Process

Completing relocation tasks in Oracle Cloud prevents everyone from accessing the service until after the next scheduled maintenance of the environment is complete. Completing relocation tasks in Oracle Cloud takes only a few minutes.

To speed up the relocation process, a Service Administrator should reschedule the daily maintenance process for the environment to start at the beginning of the hour after relocation tasks are complete. If you are too close to the beginning of the next hour when you start the relocation tasks in Oracle Cloud, schedule daily maintenance to start at the hour after that. See Setting Service Maintenance Time for instructions.



## Completing Relocation Tasks in Oracle Cloud

Oracle Cloud Account Administrators use the instructions available in Relocating a Service Entitlement to Another Identity Domain in *Managing and Monitoring Oracle Cloud* to relocate an environment.

Completing relocation tasks in Oracle Cloud takes only a few minutes. Oracle Cloud sends an email to Service Administrators when the process is complete.



You can continue with the remaining tasks only after the next daily maintenance of the environment is complete. See Scheduling the Daily Maintenance Process.

## Importing Users into the Target Identity Domain and Assigning Roles



Complete this step only for Oracle Enterprise Performance Reporting Cloud. Other services do not require this step.

After the daily maintenance process is complete, an Identity Domain Administrator imports users from the user export file into the target identity domain.

Users that exist in the target identity domain are not recreated during the user import process. Such users need only be provisioned with their original roles. New users that were added to the target identity domain must also be provisioned.

Additional information is available in Getting Started with Oracle Cloud:

- Importing a Batch of User Accounts
- Assigning One Role to Many Users

To import users in to the target identity domain and assign roles:

- 1. Sign in to My Services as an Identity Domain Administrator. See Accessing My Services for instructions. Be sure to sign into the target identity domain.
- 2. Click Users.
- Click Import.
- In Import Users, click Browse and select the users export file (users.csv) that you saved to a local folder.
- 5. Click Import.

The user import process is not instantaneous.

**6.** After the user accounts are available in the Identity Domain Administrator, provision the users with roles belonging to the relocated environment.



To grant predefined service roles to many users at once, you import role upload files, one for each predefined role. See "Assigning One Role to Many Users" in *Getting Started with Oracle Cloud*.

## Importing Maintenance Snapshot into the Relocated Environment

Use one of the following to import the maintenance snapshot:

- For Services Other Than Oracle Enterprise Performance Reporting Cloud
- For Oracle Enterprise Performance Reporting Cloud Only



Delete the current application from the environment before importing maintenance snapshot.

## For Services Other Than Oracle Enterprise Performance Reporting Cloud

A Service Administrator who is also assigned the Identity Domain Administrator role uses the EPM Automate Utility to import users, role assignments, and artifacts from the maintenance snapshot into the relocated environment.

See "Command Reference" in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud* for detailed information on the commands used in this discussion.

To import the maintenance Snapshot:

- 1. Launch the EPM Automate Utility. See these topics in Working with EPM Automate for Oracle Enterprise Performance Management Cloud:
  - Running the EPM Automate Utility: Windows
  - Running the EPM Automate Utility: Linux
- 2. Using the login command, sign in to the relocated environment in the new identity domain as a Service Administrator who also has the Identity Domain Administrator role:

#### **Examples:**

- epmautomate login USERNAME PASSWORD URL IDENTITYDOMAIN
- epmautomate login USERNAME PASSWORD\_FILE URL IDENTITYDOMAIN
- 3. Execute a command similar to the following to upload artifacts and data from the snapshot; for example, Artifact Snapshot:

epmautomate importsnapshot "Artifact Snapshot" userPassword=ExamplePwd1
resetPassword=true

4. Sign out of the service:

epmautomate logout



## For Oracle Enterprise Performance Reporting Cloud Only

Use the upload\_dbsnapshot File Transfer Utility command to upload the backup snapshot to the relocated environment. See "Using the File Transfer Utility" in Administering Oracle Enterprise Performance Reporting Cloud.

### **Email Access Details**

After testing the relocated environment, a Service Administrator should email all users to provide them the URL to access the environment in the new identity domain.

If you use the Simplified Interface of Oracle Planning and Budgeting Cloud, users must use a URL similar to the following to access the relocated environment:

https://env\_name-domain.usl.oraclecloud.com/HyperionPlanning

This replaces the following redirect URL format, which you may have previously used:

https://env\_name-domain.usl.oraclecloud.com/workspace



If the environment is not set up for SSO, Oracle Cloud Administrator (oraclecloudadmin\_ww@oracle.com) sends an email to users whose accounts are recreated in the target identity domain. This email contains the user name and a temporary password to access the environment in the new identity domain.

The Service Administrator should also ask users to modify any bookmarks or shortcuts they may have, so that they point to the new service URL.



After relocating an environment, be sure to update the information, such as the identity domain, user name, and password, in batch files or scripts that you use to perform routine maintenance tasks.

# Managing Integrated Business Process Navigation Flows

Service Administrators can set up connections that enable users to navigate across Oracle Enterprise Performance Management Cloud environments to create unified business process flows across multiple environments. Cross-environment navigation flows allow users of multiple EPM Cloud environments to sign into one environment, and then seamlessly navigate to others without going through additional authentication processes. Service Administrators can create mash-ups of artifacts from various environments into a single unified business process flow for their users. Clusters, cards, and tabs can be brought together into a single flow. These cards and tabs can contain forms, reports dashboards from various applications.



#### **Considerations**

- Connections can be created in the following services only:
  - Oracle Planning and Budgeting Cloud
  - Oracle Enterprise Planning and Budgeting Cloud
  - Oracle Financial Consolidation and Close Cloud
  - Oracle Tax Reporting Cloud
- All EPM Cloud environments can be accessed from these source connections.
   Connections can be created between environments of the same service type. Only connections where environments are in the same identity domain within the same data center are supported.



Connections across environments that use different identity domains within the same data center is not currently supported.

For detailed information on setting up and using cross-environment navigation, see the Administration Guide of the source service in which you want to configure links for navigation flow.



5

# Backing Up and Restoring an Environment Using the Maintenance Snapshot

#### In This Section:

- Overview of the Maintenance Snapshot
- For Services Other Than Oracle Enterprise Performance Reporting Cloud
  - Backing up the Maintenance Snapshot
  - Restoring Application Artifacts and Data from a Snapshot
- For Oracle Enterprise Performance Reporting Cloud Only
  - Saving Backup Snapshots
  - Restoring from a Backup

## Overview of the Maintenance Snapshot

Every day, during the operational maintenance of the environment, Oracle backs up the content of the environment to create a maintenance snapshot of existing artifacts and data. Service Administrators can use this snapshot to recover artifacts and data; for example, form definitions, reports, and so on, from the previous day that were deleted from the service after the last operational maintenance window. They can also, if needed, use it to restore the environment to the state it was in during the last operational maintenance. See Setting Service Maintenance Time.

Because Oracle stores only the snapshots created in the most recent maintenance window, the artifacts and data available for restoration depend on their state during the last maintenance window. Maintenance snapshots are created primarily to restore your environment in the case of a catastrophic failure.

Oracle recommends that you download the maintenance snapshots regularly to a local machine. Service Administrators are responsible for backing up the maintenance snapshot and then restoring the service environment if needed.

The default maximum size of your environment is 150 GB; you can purchase additional storage to extend this limit. The daily maintenance process monitors snapshots and automatically removes them prior to 60 days, oldest files first, to avoid large accumulations of snapshots (over 150 GB) from adversely impacting your environment. The daily maintenance snapshot, irrespective of its size, is always retained.



#### Note:

- An environment does not create a maintenance snapshot if it has not been in use since the last maintenance window. If an environment has not been in use for 14 days, however, a new maintenance snapshot is created.
- Generally, you can migrate maintenance snapshots from the test environment to the production environment and vice versa.
  - For Oracle Account Reconciliation Cloud only: Oracle Account Reconciliation Cloud does not support migration of snapshots from the latest service update to an earlier service update (for example, when moving snapshots between test and production environments during the window when the test environment is upgraded before the production environment.)
- You can create a backup of your environment at any time by exporting artifacts using Migration. See "Exporting Artifacts" in Administering Migration for Oracle Enterprise Performance Management Cloud.

The daily maintenance snapshot, named Artifact Snapshot, is stored in the environment.

# For Services Other Than Oracle Enterprise Performance Reporting Cloud

You can download the daily maintenance snapshot to a local computer manually from the Migration screen or automatically by using the EPM Automate Utility.

## Backing up the Maintenance Snapshot

#### **Automating the Download of the Maintenance Snapshot**

To automate the downloading of the snapshot, you create a script file containing the required EPM Automate Utility commands, and schedule it (for example, using Windows Scheduler or Linux CRON job) to run after the daily maintenance of the environment is complete. See "Scenario 8: Backing up Application Snapshot to a Computer" in Working with EPM Automate for Oracle Enterprise Performance Management Cloud for a sample Windows script that you can repurpose to download the artifact snapshot.

#### **Manually Downloading the Maintenance Snapshot**

To manually download the artifact snapshot:

- Access the environment as a Service Administrator. See Accessing EPM Cloud.
- 2. Complete a step:
  - Click Application and then Migration.
  - Oracle Enterprise Data Management Cloud only: Click Migration.



- Oracle Profitability and Cost Management Cloud only: Click Console and then (Migration).
- Click Snapshots.
- Click (Actions) next to Artifact Snapshot, and then select Download.
- 5. Save the artifact snapshot (Artifact Snapshot.zip) to the local computer.

## Restoring Application Artifacts and Data from a Snapshot

You can restore application artifacts and data from previous snapshots. For example, you can restore the artifacts and data to the state they were in a few days ago by restoring them from a snapshot that you backed up to a local machine. In such scenarios, you should upload the snapshot to Oracle Enterprise Performance Management Cloud before restoring artifacts and data.

Snapshots that you create or upload to the service are stored for 60 days, after which they are automatically deleted. See these sources for information on uploading snapshots to an environment:

- The EPM Automate Utility uploadfile command in Working with EPM Automate for Oracle Enterprise Performance Management Cloud
- "Uploading Archives to the Service" in Administering Migration for Oracle Enterprise Performance Management Cloud

To restore artifacts from a snapshot:

- 1. Access the environment as a Service Administrator. See Accessing EPM Cloud.
- 2. Complete a step:
  - Click Application and then Migration.
  - Oracle Enterprise Data Management Cloud only: Click Migration.
  - Oracle Profitability and Cost Management Cloud only: Click Console and then (Migration).
- 3. Click Snapshots.
- 4. Select the snapshot that you want to use as the source to restore artifacts.
  - To restore all artifacts of a specific component:
    - a. Expand the snapshot, and then click a component name; for example HP-Vision to list artifacts of the Vision sample application included in the snapshot.
    - b. Click Import.
  - To restore specific artifacts of service components:
    - a. Expand the snapshot, and then click a component name; for example HP-Vision to access a list of artifacts of the Vision sample application included in the snapshot.
    - b. In Artifact List, expand the list of available artifacts, and then select the artifacts you want to restore.
    - Click Close to return to Artifact Snapshots.



- d. Optional: Repeat the preceding steps to select artifacts from other components included in the snapshot.
- 5. Click [ (Selected Artifacts), and then verify the list of artifacts selected for export.
- 6. Click **Actions**, and then select **Import**.
- 7. Click OK.

The Migration Status Report opens. Click **Refresh** to verify that the operation completes without errors. Click **Cancel** to close the report.

# For Oracle Enterprise Performance Reporting Cloud Only

Oracle Enterprise Performance Reporting Cloud uses the File Transfer Utility to perform backup and restore activities. For detailed information on this utility, see "Using the File Transfer Utility" in *Administering Oracle Enterprise Performance Reporting Cloud*.



Before you restore your service from a backup snapshot, make sure the destination service is the same release or newer. You cannot restore a backup snapshot into a service that has an older release. You can confirm the version from the **Settings and Action** menu in Home page.

## Saving Backup Snapshots

A saved snapshot is used to provide a specific restore point. For example,

- The state of the system immediately when going live, or immediately after a critical point, like the finalization of a quarterly reporting period. In this case, the snapshot would be restored if you ever want to further review or investigate prior activities.
- A saved snapshot could also be used if you discover that something went wrong
  prior to the most recent snapshot. You can select one of the snapshots from your
  local file system that you saved in order to restore the service to a known state.

To download the backup snapshot using the File Transfer Utility:

- Open a Command Prompt window and navigate to the folder where the File Transfer Utility is installed.
- **2.** Execute the following command:

eprcsctl operation=download\_dbsnapshot secret=SECRET tenantid=TENTANTID
user=USER password=PASSWORD file=XML\_FILE\_PATH, Where:

- secret is a phrase that is used to encrypt the backup.
- tenantid is the name of the identity domain that services the environment.
- user and password are the Oracle Enterprise Performance Management Cloud credentials of the Service Administrator who is downloading the backup.
- file is the absolute path, including file name, for storing the downloaded backup.



For example, eprcsctl operation=download\_dbsnapshot secret=myencryptionphrase tenantid=mydomain user=johndoe password=pwd file=c:\dbdownload.xml

## Restoring from a Backup

Restore can be done either through the Settings on the Home page or by using the File Transfer Utility. When you restore a backup snapshot, your system returns to that prior state. Changes that occurred after the backup are not reflected in the restored system.

Restore will take place during the next daily maintenance, which you may reschedule so that it starts soon after you upload the backup snapshot. See Setting Service Maintenance Time.



From the Daily Maintenance screen, a Service Administrator can restore an environment using the current maintenance snapshot. To access this screen, select **Daily Maintenance** from the Home page.

To restore an environment using a backup snapshot that you downloaded:

- Open a Command Prompt window and navigate to the folder where the File Transfer Utility is installed.
- 2. Execute the following command to upload the snapshot and to schedule it for restoration during the next scheduled maintenance of the environment.

eprcsctl operation=upload\_dbsnapshot secret=SECRET tenantid=TENTANTID
user=USER password=PASSWORD file=XML\_FILE\_PATH, Where:

- secret is a phrase that is used to encrypt the backup.
- tenantid is the name of the identity domain that services the environment.
- user and password are the Oracle Enterprise Performance Management Cloud credentials of the Service Administrator who is uploading the backup.
- file is the absolute path, including file name, from where the backup is to be uploaded.

For example, eprcsctl operation=upload\_dbsnapshot secret=myencryptionphrase tenantid=mydomain user=johndoe password=pwd file=c:\dbdownload.xml



6

# Setting Up EPM Cloud Environments

#### In This Section:

- Understanding Updates to an Environment and Viewing Readiness Information
- Setting Service Maintenance Time
- Setting Content Update Start Time
- Monitoring Your Service
  - Using Activity Reports and Access Logs to Monitor Usage
  - Using the Provisioning Report to Monitor Users
    - \* For Services Other than Oracle Enterprise Performance Reporting Cloud
    - \* For Oracle Enterprise Performance Reporting Cloud
  - Monitoring Environments Using Oracle Cloud Applications
- Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility
  - Submitting Feedback Using the Provide Feedback Utility
  - Disabling Feedback Notification
- Rebranding EPM Cloud Environments
- Understanding Encryption Levels and Session Timeout
- Configuring SPF Record for Oracle Cloud Email Verification
- Retrieving Data After Service Termination

# 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.
- 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.

## **Setting Service Maintenance Time**

Each environment requires up to one hour every day to perform routine maintenance. Service Administrators can select (and change) the most convenient time to start the maintenance window. In addition to routine maintenance, Oracle applies required patches (for example, monthly updates) to the environment and creates maintenance snapshots and Activity Reports during the maintenance window.

The new maintenance snapshot replaces the previous snapshot. Oracle recommends that you download the snapshot daily to backup the environment. See Backing Up and Restoring an Environment Using the Maintenance Snapshot

Because the environment is not available to users during the maintenance window, the Service Administrator should identify a one-hour period when no one uses the service. Any connected user will be logged off and will lose unsaved data.

The default maintenance start time is midnight Pacific Standard Time (PST). If you do not reset the default start time for your environment, Oracle randomizes it to start between 10:00 p.m. and 1:00 a.m. PST. After you select a maintenance start time, Oracle honors your selection even if it is midnight PST.

Some services may perform additional maintenance operations. For example, Oracle Enterprise Planning and Budgeting Cloud, Oracle Account Reconciliation Cloud, and Oracle Financial Consolidation and Close Cloud may require additional maintenance time for content upgrade. Oracle Enterprise Performance Management Cloud environments are available only to Service Administrators during such maintenance periods.

To set the maintenance start time:

- 1. Access an environment. See Accessing EPM Cloud.
- 2. Click **Tools** and then **Daily Maintenance**.



# Oracle Enterprise Performance Reporting Cloud only: Click Daily Maintenance.

- 3. Select the time zone of your data center.
- 4. In **Start Time**, select the time when the maintenance process should start.
- 5. Click Apply.

## **Setting Content Update Start Time**

#### What is Content Update?

Business processes and applications may, sometimes, require a content update to accommodate the changes introduced during the daily maintenance of an environment. If a content update is required, Oracle creates and schedules a content update job, which will, by default, be executed 12 hours after the daily maintenance is completed. All activities in the environment are suspended while content update is in progress. If other jobs are active in the environment when the content update job is scheduled to start, the content update job waits for three hours after which it is rescheduled for the next day. If a similar situation prevails at the content update scheduled start time on the next day, the update job is forcibly executed during the next daily maintenance.

#### Note:

Currently, content update start time modification is supported only for new Oracle Enterprise Planning and Budgeting Cloud and Oracle Strategic Workforce Planning Cloud subscriptions that were provisioned after March 16, 2018.

For Oracle Financial Consolidation and Close Cloud and Oracle Tax Reporting Cloud subscriptions and Oracle Enterprise Planning and Budgeting Cloud and Strategic Workforce Planning subscriptions that were provisioned prior to March 16, 2018, content update is performed immediately after completing daily maintenance.

Service Administrators can determine when content update processes starts by specifying an offset in relation to the daily maintenance start time. You can defer content update for a maximum of 12 hours. Oracle will create and schedule a new content update job based on your setting.

Because Oracle performs a cube refresh after content update, application customizations; for example, incomplete changes to the outline and metadata, may cause the content update to fail. In such cases, a Service Administrator should sign in to the environment and remove the customizations or complete the changes that caused the cube refresh to fail. If content update fails, the environment becomes inaccessible using REST APIs and the EPM Automate Utility.

If a Service Administrator signs into an environment for which content update is scheduled, a screen indicating the scheduled content update is displayed. From this screen, the Service Administrator can start the content update or schedule it for later.



#### Note:

To view the progress and details of the content update process, use the Jobs console, which you can access by clicking **Jobs** in the **Application** cluster in the Home page.

To specify content update start time:

- 1. Access an environment as a Service Administrator.
- 2. Click Tools, then Daily Maintenance, and then Upgrade.
- 3. Using **Hours** and **Mins** drop down lists, select the offset time for starting the upgrade. This offset is in relation to the daily maintenance start time.
  - If daily maintenance is in progress at the content update start time, the environment will wait for the maintenance process to end before starting content update.
- 4. To always start the content update at the default update start time, select **in the future**, automatically update the application content.
- 5. Click Save.

## Monitoring Your Service

#### **Related Topics**

- Using Activity Reports and Access Logs to Monitor Usage
- Using the Provisioning Report to Monitor Users
- Monitoring Environments Using Oracle Cloud Applications

## Using Activity Reports and Access Logs to Monitor Usage



The information in this section is not applicable to these services:

- Oracle Enterprise Data Management Cloud
- Oracle Enterprise Performance Reporting Cloud

For Oracle Enterprise Performance Reporting Cloud, you can generate a System Audit log, a CSV file, to identify changes to the service over a period of time. See "Performing an Audit" in *Administering Oracle Enterprise Performance Reporting Cloud* for detailed information.

### **About Activity Report**

The Activity Report, which is automatically generated for each day, enables Service Administrators to understand application usage. It also helps streamline application



design by identifying calculation scripts and user requests that impact application performance. Additionally, the report may be used to compare service usage and performance to those available in a report from the past. Information about these areas is available:

- User Information
- Interface Usage and Service Response Data
- Essbase Statistics
- Calculation Script Statistics
- Business Rules and Application Design Information
- CPU and Memory Usage Statistics
- Browser, Smart View, and Excel Usage Information



Information available in the Activity Report depends on the components used. For example, the report will not contain Oracle Smart View for Office statistics if no user used it to access data in the course of the day.

#### **User Information**

User information available in the report includes the following:

Number of users who accessed the service.

In addition to the average usage duration for the number of users on a specific day, the report presents information on the number of users who logged on each day over the last week, users over the last seven days, and users over the last 30 days.

Metric	08/02	08/03	08/04	08/05	08/06	08/07	Today
Users	26	25	27	27	27	, 4 <u>4</u>	22
Users Last 7 Days	35	36	41	45	49	-	51
Users Last 30 Days	35	36	41	45	49	1	52
Average Duration (Hour:Min)	00:55	00:57	00:53	00:53	00:53	-	00:28

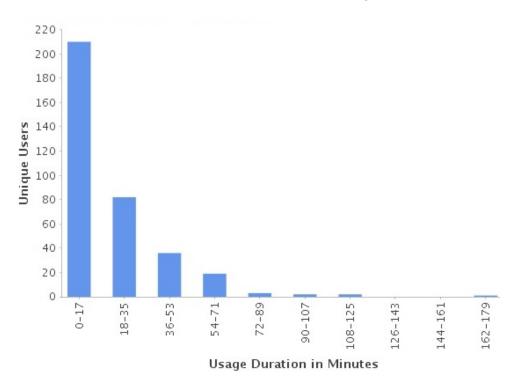
You can use this information to determine if there is a correlation between the number of users and the performance of your environment.

 List of feedbacks that were submitted to Oracle. This section helps you identify some of the issues that users faced.



User Provided Feedbacks					
Time	User	Feedback			
17:54:32	janedoe	Feedback submitted in production			
17:52:40	janedoe	Feedback submitted in production			

Number of users that used the environment for different ranges of durations.



Top 10 most active users based on usage duration.

User	Usage Duration (Min:Sec)
user0032	1175:35
user0022	1169:49
user0023	1166:57
user0025	1164:40
user0029	1164:33
user003	1163:30
user002	1162:47
user00:5	1162:33
user0092	1160:28
user0099	1146:33

Top 10 least active users based on usage duration.

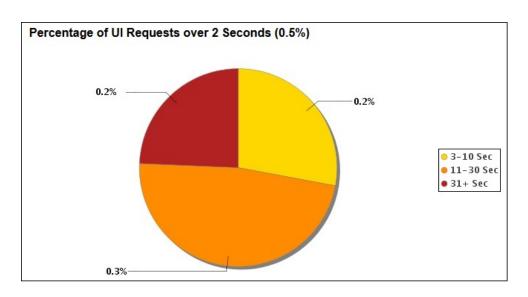
User	Usage Duration (Min:Sec
user300	00:00
user200	00:00
user500	04:49
user0092	04:50
user0099	04:58
user0032_1	06:23
user0022_1	06:24
user0023_1	06:24
user0025_1	06:24
user0029_1	06:24

### Interface Usage and Service Response Data

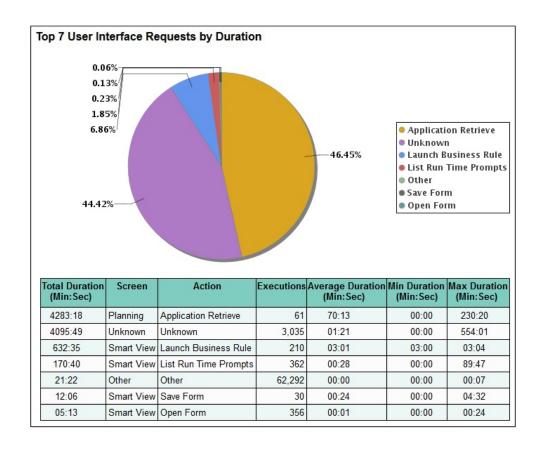
The Activity Report presents the following information on user interface requests and service response:

• Percentage of UI requests that took more than 2 seconds to finish.

A UI request is a user action such as signing in, loading data, opening or saving forms, and validating rules. The section on the top 30 worst performing user actions identifies the user, duration of the action, the activity that the user was performing, and the screen that the user was on.

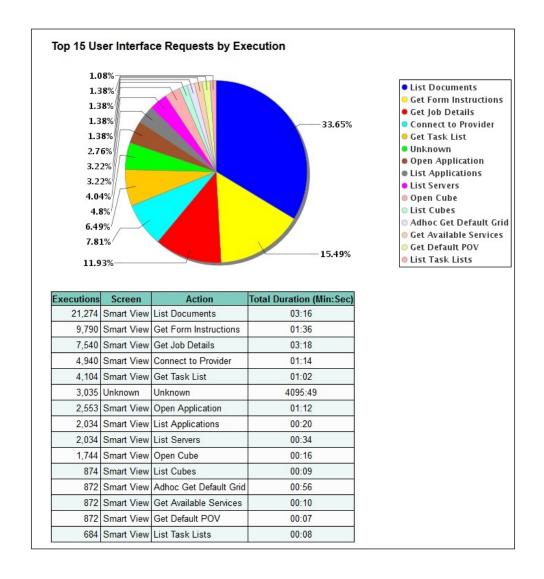


Top 7 requests that took the most time to complete.



Top 15 user interface requests that were executed most frequently.



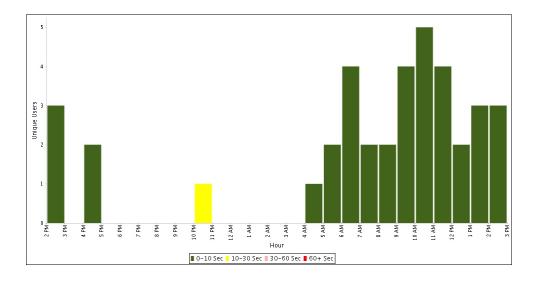


Top 30 user interface actions that took more than 2 seconds to complete. By analyzing this data, you can identify optimizations that can improve performance.

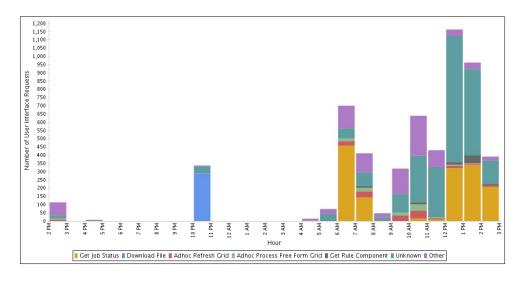
Duration (Min:Sec)	User	Time (PDT)	Screen	Action	Object	Durations (Min:Sec)
02:04	xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx	06:38:33	Smart View	Adhoc Zoom In		_Provider=02:03 See More
01:41	xxxxxxxxx.example.com	10:37:32	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:40
01:40	xxxxxxxxx.example.com	09:59:32	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:40
01:40	xxxxxxxx.example.com	10:27:44	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:40
01:40	xxxxxxxxxx.example.com	10:19:02	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:40
01:40	xxxxxxxx.example.com	10:30:16	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:40
01:39	xxxxxxxxxx.example.com	10:33:34	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:38
01:38	xxxxxxxxx.example.com	14:13:14	Smart View	Launch Business Rule	BusinessRule=03_ACT_Expenses_All_Consolidation	_Provider=01:37 See More
01:38	xxxxxxxxx.example.com	09:54:19	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:37
01:38	xxxxxxxx.example.com	09:57:02	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:37
01:38	xxxxxxxxxx.example.com	10:25:01	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:37
01:37	xxxxxxxx.example.com	10:16:18	Planning	Run Rule	Rule Name=03_ACT_Expenses_All_Consolidation	Business Rules=01:37
01:36	xxxxxxxxxx.example.com	14:17:01	Smart View	Launch Business Rule	BusinessRule=03_ACT_Expenses_All_Consolidation	_Provider=01:35 See More
00:45	xxxxxxxxx.example.com	22:35:15	EPM Automate	Download File	Chunk Size=10000 KB, See More	
00:45	xxxxxxxxx.example.com	22:08:38	EPM Automate	Download File	Chunk Size=10000 KB, See More	
00:44	xxxxxxxx.example.com	22:39:18	EPM Automate	Download File	Chunk Size=10000 KB, See More	
00:42	xxxxxxxxxx.example.com	22:08:35	EPM Automate	Download File	Chunk Size=10000 KB, See More	
00:41	xxxxxxxxx.example.com	22:39:16	EPM Automate	Download File	Chunk Size=10000 KB, See More	
00:41	xxxxxxxxx.example.com	22:40:35	EPM Automate	Download File	Chunk Size=10000 KB, See More	

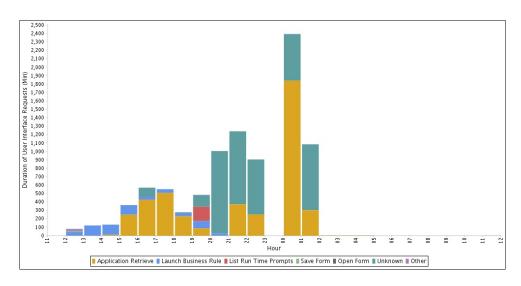
Average service response time every hour for the last 24 hours.





Number and duration of interface requests each hour.

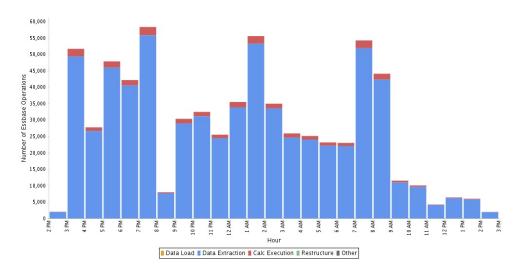




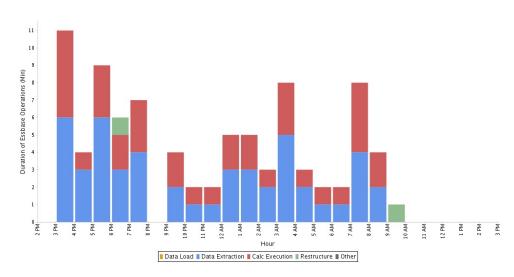
### **Essbase Statistics**

The following Essbase-related data is available:

· Number of Essbase operations each hour.



Duration of Essbase operations each hour.



Top 10 Essbase queries that were executed for the longest durations.



Total Duration (Min:Sec)	Executions	Essbase Query
07:11	1	Apr, Ver1_inp,None,FY18,ICP_0000,[Mumbai].[E_1005],M_3101,[Total Room Type & Front Office].[D_1001],Local Currency,Budget,A_361001,, Ver1_inp,None,FY18,ICP_0000,[Mumbai].[E_1009],M_3101,[Total Room Type & Front Office].[D_1001], Loc
04:34	6	SELECT {[A_268051],[A_163201],[A_361001],[A_361002],[A_361004],[A_361051],[A_361101],[A_361151], [A_361153],[A_361103],[A_361201],[A_361202],[A_361203],[A_361205],[A_361764],[A_361352],[A_361351] [A_361651],[A_361653],[A_361670],[A_361701],[A_361756],[
00:32	2	Apr, Vert_Inp,None,FY18,ICP_0000,[Mumbai].[E_1005],M_3101,[Total Room Type & Front Office].[D_1001],Local Currency,Budget,A_361001,, Vert_Inp,None,FY18,ICP_0000,[Mumbai].[E_1009],M_3101,[Total Room Type & Front Office].[D_1001], Loc

Top 10 most frequently run Essbase queries.

Executions	Total Duration (Min:Sec)	Essbase Query
6		SELECT {[A_268051],[A_163201],[A_361001],[A_361002],[A_361004],[A_361051],[A_361101],[A_361151], [A_361153],[A_361103],[A_361201],[A_361202],[A_361203],[A_361205],[A_361764],[A_361352],[A_361351] [A_361651],[A_361653],[A_361670],[A_361701],[A_361756],[
4	01:05	
1	07:11	Apr, Ver1_inp,None,FY18,ICP_0000,[Mumbai],[E_1005],M_3101,[Total Room Type & Front Office],[D_1001],Local Currency,Budget,A_361001,, Ver1_inp,None,FY18,ICP_0000,[Mumbai],[E_1009],M_3101,[Total Room Type & Front Office],[D_1001], Loc

Top 10 Essbase queries that took over 15 seconds to execute.

Ouration (Min:Sec)	Time	Essbase Query
07:11	05:30:30	
00:48	05:46:08	Apr, Ver1_Inp,None,FY18,ICP_0000,[Mumbai].[E_1005],M_3101,[Total Room Type & Front Office].[D_1001],Local Currency,Budget,A_361001,, Ver1_Inp,None,FY18,ICP_0000,[Mumbai].[E_1009],M_3101,[Total Room Type & Front Office].[D_1001], Loc
00:48	05:45:01	Apr, Ver1_Inp,None,FY18,ICP_0000,[Bengaluru].[E_2507],Dir,[Total Room Type & Front Office].[D_1001],Local Currency,Budget,Reduction in HeadCount,, Ver1_Inp,None,FY18,ICP_0000,[Bengaluru].[E_2507],Dir,[Total Room Type & Front Office

Analyzing the Essbase queries listed in this section helps you optimize the process to improve performance.

### Calculation Script Statistics

The Activity Reports contains the following information about calculation scripts that were executed in the environment:

• Top 5 worst performing calculation scripts that took over one minute to execute.

Duration (Min:Sec)	Time	Context	Calc Script Command
22:23	05:01:48	Calc Script: Forecast_Capex Blocks Read: 8,996 Blocks Updated: 104 Blocks Created: 0	FD("E_1503", Fcst_1_11, FY18, Ver1_inp, "Local Currency") FDK("ICP_0000", "M_0000", @Relative("Total Dept", 0)) FDK(May.Mar) DATACOPY "Capex Value"->"Room Furniture" TO "A_261351"->"None"; DATACOPY "Capex Value"->"POS Furniture" TO "A_261351"->"None"; DATACOPY "Capex Value"->"Pool Items" TO "A_261351"->"None"; DATACOPY "Capex Value"->"Room Equipments" TO "A_261251"->"None"; DATACOPY "Capex Value"->"Room Equipments" TO "A_261251"->"None"; DATACOPY "Capex Value"->"Laundry Equipment" TO "A_261265"->"None"; DATACOPY "Capex Value"->"Laundry Equipment" TO "A_261265"->"None"
21:38	05:04:11	Calc Script: Forecast_Capex Blocks Read: 8,996 Blocks Updated: 104 Blocks Created: 0	FIX("E_1503", Fcst_1_11, FY18, Ver1_inp, "Local Currency") FIX("ICP_0000", "M_0000", @Relative("Total Dept", 0)) FIX(May:Mar) DATACOPY "Capex Value"->"Room Furniture" TO "A_261351"->"None"; DATACOPY "Capex Value"->"POS Furniture" TO "A_261351"->"None"; DATACOPY "Capex Value"->"Pool Items" TO "A_261351"->"None"; DATACOPY "Capex Value"->"Room Equipments" TO "A_261251"->"None"; DATACOPY "Capex Value"->"Room Equipments" TO "A_261251"->"None"; DATACOPY "Capex Value"->"Laundry Equipment" TO "A_261265"->"None", DATACOPY "Capex Value"->"Laundry Equipment" TO "A_261265"->"None", DATACOPY "Capex Value"->"Housekeeping Items
21:18	04:59:49	Calc Script: Forecast_Capex Blocks Read: 8,996 Blocks Updated: 104 Blocks Created: 0	FDX("E_1503", Fcst_1_11, FY18, Ver1_inp, "Local Currency") FDX("ICP_0000", "M_0000", @Relative("Total Dept", 0)) FDX(May:Mar) DATACOPY "Capex Value"->"Room Furniture" TO "A_261351"->"None"; DATACOPY "Capex Value"->"POS Furniture" TO "A_261351"->"None"; DATACOPY "Capex Value"->"Pool Items" TO "A_261351"->"None"; DATACOPY "Capex Value"->"Room Equipments" TO "A_261251"->"None"; DATACOPY "Capex Value"->"Laundry Equipment" TO "A_261265"->"None"; DATACOPY "Capex Value"->"Laundry Equipment" TO "A_261265"->"None"; DATACOPY "Capex Value"->"Laundry Equipment" TO "A_261265"->"None"

Top 10 calculation scripts by duration

This table identifies the business rules that took the longest time to run. Available information includes the name of the calculation script, the number of times the script was run, and the duration.

Calc Script	Executions	Average Duration (Min:Sec)	Min Duration (Min: Sec)	Max Duration (Min:Sec)
Data Export: OLU	2	11:45	09:53	13:38
Fcst_Task	30	00:22	00:08	00:44
Load GL Actuals Current Year	9	00:11	00:07	00:26
Load GL Actuals Current Year ? Closed Month	50	00:04	00:01	00:05
Fcst_RoomsMainCalc	3	00:01	00:01	00:01
Fcst_BanqCateringMainCalc	4	00:01	00:01	00:01
Fcst_OtherOperatedMain	8	00:00	00:00	00:00
Fcst_OutRevOthExpCalc	4	00:00	00:00	00:00
Fcst_OverheadPropOpsUtilitiesExpCalc	2	00:00	00:00	00:00
Fcst_GLMSBenefitsCalc	18	00:00	00:00	00:00

• Top 10 calculation scripts by execution.



Top 10 Ca	Top 10 Calc Scripts by Executions					
Executions	Calc Name					
74	Weekly_Webform_Calculation					
50	Load GL Actuals Current Year ? Closed Month					
30	Fcst_Task					
18	Fcst_GLMSBenefitsCalc					
15	Weekly Task					
9	Load GL Actuals Current Year					
8	Fcst_OtherOperatedMain					
4	Fcst_BanqCateringMainCalc					
4	Fcst_OutRevOthExpCalc					
3	Fcst_RoomsMainCalc					

Top 10 worst performing calculation scripts.

op 10 Worst Performing Calc Scripts						
Duration (Min:Sec)	Time (PST)	Application	Calc Script			
13:38	02:03:11	PROPPLAN	Data Export: OLU			
09:53	01:48:44	PROPPLAN	Data Export: OLU			
00:44	18:50:40	PROPPLAN	Fcst_Task			
00:43	18:43:53	PROPPLAN	Fcst_Task			
00:43	18:55:08	PROPPLAN	Fcst_Task			
00:43	19:10:53	PROPPLAN	Fcst_Task			
00:26	21:01:21	PROPPLAN	Fcst_Task			
00:26	18:37:30	PROPPLAN	Load GL Actuals Current Year			
00:24	19:25:47	PROPPLAN	Fcst_Task			
00:22	19:05:11	PROPPLAN	Fcst_Task			

### Business Rules and Application Design Information

The following information is available:

• Top 10 worst performing business rules that takes more than 30 seconds to run.



Duration (Min:Sec)	Time (PST)	User	Business Rule	Run Time Prompts	
06:57	13:46:29	jdoe	Admin Currency Conversion	rtp_Entity:"Americas_Area" See More	
01:43	13:00:31	janedoe	Fcst_Task	rtp_Entity:"WA_Boca_Raton"	
01:39	07:01:42	jdoe	Fcst_Task	rtp_Entity:"Bonnet_Creek_Complex"	
01:35	13:38:18	janedoe	Fcst_Task	rtp_Entity:"WA_Boca_Raton"	
01:28	09:55:29	jdoe	Fcst_Task	rtp_Entity:"Bonnet_Creek_Complex"	
01:28	08:24:56	janedoe	End User Datacopy	rtp_Entity:"36391_51622" See More	
01:23	18:50:40	jdoe	Fcst_Task	rtp_Entity:"La_Quinta"	
01:22	19:10:54	janedoe	Fcst_Task	rtp_Entity:"La_Quinta"	
01:22	18:43:53	jdoe	Fcst_Task	rtp_Entity:"La_Quinta"	
01:22	18:55:09	janedoe	Fcst_Task	rtp_Entity:"La_Quinta"	

Business rules that take more than 3 seconds to run.

Business Rules Attached to a Form Taking Longer than 3 Seconds									
Duration (Min:Sec)	Time (PST)	User	Form	Business Rule	Run Time Prompts				
00:03	07:18:38	jdoe	Other Operated PL - Forecast	Fcst_OtherOperatedMain	rtp_Department:"D11202" See More				
00:03	13:07:47	janedoe	Rooms PL - Forecast	Fcst_RoomsMainCalc	rtp_Department:"D11010" See More				

Application design changes that occurred during the last 24 hours.

This section provides an audit trail of application design changes, if any. Information available in this table includes application name, type and name of the modified design artifact, identity of the user who modified the artifact, and the time when the changes were made. Data changes are not reflected in this table.

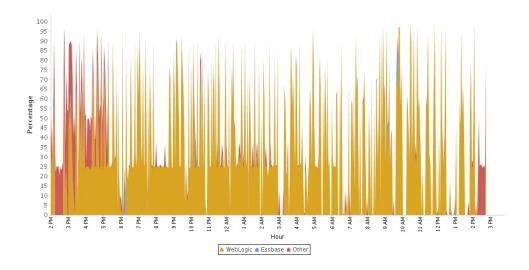
Application Design Changes								
Application Name Type		Artifact Name	Modified By	<b>Modified Time</b>				
Vision	Planning Form	/Global Artifacts/Composite Forms/Test1	xxxxxxxxxxx@example.com	20:16:16				

### CPU and Memory Usage Statistics

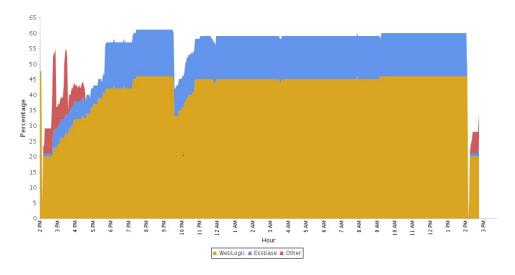
The following information on CPU and memory usage is available:

CPU usage for Essbase and application server.





Memory usage for Essbase and application server.



### Browser, Smart View, and Excel Usage Information

The following information is available:

- Oracle Smart View for Office versions being used and the number of users who used them.
- The 10 most active Smart View users who did not use the current version of Smart View.
- Top 10 users who use older versions of Smart View.
- 10 Most Active Smart View users on Older Versions of Microsoft Excel
- Microsoft Excel Versions in use and the number of users who use them.
- The versions of the browsers that were used to access the service and the number of users who used them.
- Unsupported browser versions and the number of users who used them.



### Viewing and Downloading Activity Reports and Access Logs



The information in this section is not applicable to Oracle Enterprise Data Management Cloud and Oracle Enterprise Performance Reporting Cloud.

To view and download Activity Reports and Access Logs:

- 1. Access the service. See Accessing EPM Cloud.
- Perform an action:
  - Oracle Profitability and Cost Management Cloud only: Click Application, then Application, and then Performance.
  - Oracle Account Reconciliation Cloud only: Click Console, and then Activity Reports.
  - Other services: Click Application, then Overview, and then Activity Reports.
- **3.** Perform an action:
  - To open an activity report, click View under Activity Report in the row that indicates the day for which you want to view the report.
  - To view and download an access log, click **Download** under **Access Log** in the row that indicates the day for which you want to download the log.

### Automating Activity Report and Access Log Download

Use the <code>downloadfile</code> EPM Automate Utility command to download activity reports and access logs to a local computer if you need them for audit purposes.

Oracle provides you a script that demonstrates how to use the <code>downloadfile</code> command to automate file download process. For detailed information, see these topics in Working with EPM Automate for Oracle Enterprise Performance Management Cloud:

- Automate Activity Report Downloads to a Local Computer
- Download Access Logs from an Environment
- Automating Script Execution
- Installing the EPM Automate Utility
- · Running the EPM Automate Utility

### Using the Provisioning Report to Monitor Users

You use the Provisioning Report to identify users who are provisioned to access an environment. In addition to listing the provisioned users, this report identifies the number of provisioned users who are authorized to access the environment.



### For Services Other than Oracle Enterprise Performance Reporting Cloud

You can use Access Control or the EPM Automate Utility to generate and download the Provisioning Report.

### Using Access Control to Generate the Provisioning Report

To generate and download a Provisioning Report:

- 1. Access the service as a Service Administrator. See Accessing EPM Cloud.
- 2. On the Home page, Click Tools, and then Access Control.
- 3. Click Provisioning Report.

The service displays the Provisioning Report, which shows the number of authorized users, their roles, and how those roles are granted.



### Using a Script to Automate the Process

Using the EPM Automate Utility, you can automate the process of creating the provisioning report and counting the number of provisioned users of an environment. See "Scenario 12: Counting the Number of Provisioned Users" in *Working with EPM Automate for Oracle Enterprise Performance Management Cloud*.

### For Oracle Enterprise Performance Reporting Cloud

You use a manual process described in the following steps to generate a list of unique users provisioned to access Oracle Enterprise Performance Reporting Cloud environments.

From My Services, generate a list of users provisioned with each predefined
Oracle Enterprise Performance Management Cloud role. Because there are four
predefined roles in each environment, you must generate four lists of users for an
environment.



If you need to count unique users, generate the list of provisioned users separately for test and production environments.

- Use a program such as Microsoft Excel to count unique users who are authorized to use the environment. For detailed information, consult the documentation from the vendor of the program.
  - Combine the list of provisioned users into one master list
  - Count unique provisioned users

### Generating Lists of Provisioned Users

To count unique authorized users of a service, you must generate lists of provisioned users in both the test and production environments.

To generate a list of users provisioned with predefined roles:

- 1. Access My Services. See Accessing My Services.
- 2. Click Users.
- 3. Generate a list of users who are assigned to a predefined role.
  - a. From **Show**, select a role.
  - b. Click Export.
  - c. Follow the on-screen prompts to save users.CSV.
  - **d.** Rename users.csv, for example, to users\_rolename.csv so that you do not overwrite the file later when you generate the list of users who are provisioned with other predefined roles.
- **4.** Repeat the preceding step to generate lists of users who are assigned other predefined roles.

### **Counting Unique Users**

This section explains one method to use Microsoft Excel to count the unique users in the lists of authorized users you generated for an environment.

To count authorized Oracle Enterprise Performance Reporting Cloud users:

1. Combine the lists of users you generated.

If you are counting the number of provisioned users in an environment, you combine four files, one each for the users provisioned with each predefined role of the environment. If you are counting the number of authorized users in a service, you combine eight files, four from the test environment and four from the production environment.

- **a.** Move the generated files into a folder. Ensure that no other files are present in the folder.
- b. Click Start, then All Programs, and then Accessories.
- c. Right-click Command Prompt, and then select Run as Administrator.
- d. Click Yes in the User Access Control dialog box.
- e. Change the directory to the folder where the generated files are stored.
- f. Execute this command:

copy \*.CSV all-NEW\_FILE\_NAME.CSV



Be sure to replace NEW\_FILE\_NAME.CSV with the file name; for example, all\_users, for the combined file.

- 2. Using Excel, open the combined file; for example, all\_users.csv
- 3. Select the **Email** column by clicking the column header.
- 4. Open the **Data** ribbon.
- 5. From Data Tools, select Remove Duplicates.



Email ID is the only unique identifier across user accounts. You derive the number of authorized users by removing duplicates and then counting the remaining email IDs.

- 6. In Remove Duplicates Warning, select Continue with the current selection, and then click Remove Duplicates.
- 7. In Remove Duplicates, click OK.

Excel displays a message, which indicates the number of remaining unique values. This is the number of provisioned users.



### Monitoring Environments Using Oracle Cloud Applications

Oracle Cloud provides two applications—My Services and My Account—to monitor environments. My Services application provides both summary and detailed information to monitor active environments belonging to one identity domain. You use the My Account application to monitor environments across multiple data centers and identity domains.

A dashboard that provides an overview of the health of active applications over a period of 14 days is available in Oracle Cloud. You can view historical service status, outages, and uptime percentage for a specific day by hovering over the cell for the specific application.

You can drill down to each application listed in the dashboard to gather detailed information. For Oracle Cloud, data is presented in the following default metrics:

- Number of users
- Average user interface response time (ms)
- · Size of data (GB)

For detailed information on monitoring Oracle Cloud Services, see the following sections in *Getting Started with Oracle Cloud*:



- Using My Account to Activate and Monitor Oracle Cloud Services
- Using My Services to Monitor and Administer Oracle Cloud Services

# 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

For services other than Oracle Enterprise Performance Reporting Cloud: While submitting feedback, Service Administrators can consent to submit the last maintenance snapshot of the environment to Oracle. Oracle uses the submitted application snapshot for testing purposes only; Oracle does not make changes to the application or data. If you consent to submit the maintenance snapshot, Oracle automatically encrypts and copies the log files and the current maintenance snapshot.



It is your responsibility to keep backup copies of the maintenance snapshot for recovery purposes. Oracle cannot restore your service using the snapshot that you submit. See Backing Up and Restoring an Environment Using the Maintenance Snapshot.

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



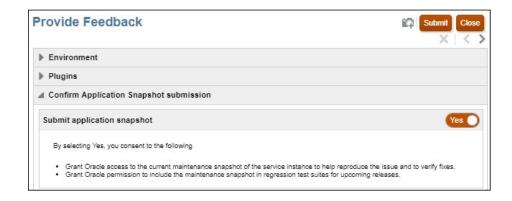
#### Note:

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 are 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 these steps to add more screenshots.
- 6. Click Submit.
- 7. Review the browser, environment, and plug-in information. Click (Next) to review screenshots.
- 8. **Optional:** If you are a Service Administrator, allow Oracle to access the maintenance snapshot.
  - a. In Provide Feedback, click User permissions.
  - **b.** In **Submit application snapshot**, click **Details** to view information about how Oracle uses the snapshot.
  - **c.** Select the radio button to indicate that you agree to submit the application snapshot to Oracle.





- 9. Click Submit.
- 10. 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.
- 11. 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:

- 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.

# Rebranding EPM Cloud Environments

#### **Customizable UI Elements**

You can customize your environments for easy recognition; for example, to distinguish your test environment from the production environments or to distinguish one service type from another. You can change the following to rebrand an environment:



- The background image that displays on the Home page
- The default display theme, which changes the color scheme of the user interface
- The Oracle logo, which appears at the right top corner of the Home page

#### Note:

Oracle Enterprise Data Management Cloud environments cannot be rebranded.

Not all Oracle Enterprise Performance Management Cloud services offer identical customization options.

The logo and background image that you use must be accessible using a URL; you cannot import them into EPM Cloud environments. Oracle does not store or maintain them.

#### Logo Requirements

Logo images smaller than 125 pixels wide and 25 pixels are displayed without resizing them. For large image logos, Oracle recommends that you maintain a 5:1 ratio so the image can be scaled without distortion.

#### **Background Image Requirements**

The default size for the background image is 1024x768. If you use a larger background image, the image is scaled to fit the resolution setting of your display. If you want your background image to fit both a browser and a mobile device, Oracle recommends that you size the image so that it fits your biggest screen (or highest resolution device). The background image is centered horizontally.

To customize the appearance of your environment:

- 1. Access the environment as a Service Administrator. See Accessing EPM Cloud.
- 2. Perform an action:
  - All services other than Oracle Enterprise Performance Reporting Cloud: Click Tools and then Appearance.
  - Oracle Enterprise Performance Reporting Cloud only: Click Appearance.
- **3. Optional:** To use a custom logo, in **Logo Image URL**, enter a web address at which the logo image is available.
- **4. Optional:** To change the background image, in **Background Image URL**, enter a web address where the image is available.
- **5. Optional:** To change background color (if this option is available):
  - Oracle Profitability and Cost Management Cloud only: From Background color, select a color scheme.
  - Other Services: From Theme, select a color scheme.





This setting does not apply to Oracle Enterprise Performance Reporting Cloud environments.

Optional: To change the shape of screen corners (if this option is available), from Shape, select Oblong, Round, or Square.

This setting is not available for Oracle Profitability and Cost Management Cloud and Oracle Enterprise Performance Reporting Cloud environments.

7. Save the settings that you specified.

# Understanding Encryption Levels and Session Timeout

#### Encryption Level for Browsers, Smart View, and the EPM Automate Utility

Oracle Enterprise Performance Management Cloud uses Transport Layer Security (TLS) with SHA-2/SHA-256 Cryptographic Hash Algorithm to secure communication with browsers, Oracle Smart View for Office, and the EPM Automate Utility.

Oracle recommends that you install the newest version of the supported browser. Generally, the newest version is compatible with higher cipher strengths and has improved security. See Supported Browsers.

#### **Encryption Level for SAML Messages to Identity Providers**

- Oracle Access Manager, which is the default EPM Cloud Service Provider (SP), uses the MD5 algorithm to sign SAML messages to the Identity Provider (IdP) that you configured when setting up SSO. See Securing EPM Cloud.
- If your IdP, for example, SiteMinder, indicates that the signature validation of authentication request from the SP fails because it is signed using MD5 while the IdP supports only newer algorithms (such as RSA), create a service request.
  - Sign into My Services.
  - Create a service request containing an Exception Request asking Oracle to provide SSO SP XML metadata (in SHA-256 format). In the service request, indicate Hosting Services Problem Type.

On receiving the service request, Oracle will attach the SP metadata in SHA-256 format to the service request, which you can extract and upload to the IdP.

EPM Cloud relational data is encrypted using Transparent Data Encryption (TDE).

#### **Session Timeout Settings**

The service automatically terminates inactive user sessions after 75 minutes.

Smart View terminates sessions after 75 minutes or the HTTP session timeout specified for Internet Explorer, whichever is shorter.

# Configuring SPF Record for Oracle Cloud Email Verification

Oracle publishes the Sender Protection Framework (SPF) policy that identifies the Oracle server IP addresses and subnets that are permitted to send cloud services



emails. You can use this information to assess the validity of the messages to determine whether or not to accept them. Additionally, you can use the information as a part of the message protection services.

Add the following lines in your SPF record to take advantage of this protection:

"v=spf1 include:spf\_c.oracle.com include:spf\_a.oracle.com -all"

# Retrieving Data After Service Termination

You retrieve your archived data using the Identity Domain Secure File Transfer Protocol (SFTP) Account that was configured by resetting its password. You cannot retrieve the archived data if the Identity Domain SFTP Account password was not reset before terminating the service. For more information, see these topics in *Managing and Monitoring Oracle Cloud*:

- Setting Up Secure FTP User Accounts
- Terminating Your Paid Subscription to an Oracle Cloud Service



7

# Tips and Frequently Asked Questions

#### In This Section:

- Resolving Connection Issues
- Resolving EPM Automate Utility Access Problems
- Monitoring the Service
- Managing User Accounts
- Client Compatibility
- Best Practices for Production Environments
- Understanding the Patching Process

# **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?

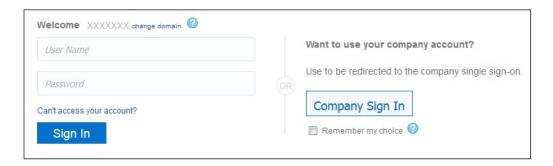
Connect to EPM Cloud without using VPN to ensure that the EPM Cloud URL and credentials are valid. If you can access the service, connectivity issue may be localized to the following, which requires help from your network administrator:

- 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.

# Resolving EPM Automate Utility Access Problems

Why does the EPM Automate Utility fail to initiate a session if my service is configured for SSO with an identity provider?

The EPM Automate Utility does not work with SSO (identity provider) credentials that you use to access the network resources of your organization.

If the service is configured for SSO, an Identity Domain Administrator must enable EPM Automate Utility users to sign in with their identity domain credentials.

See Ensuring that Users Can Run EPM Cloud Utilities After Configuring SSO.

Also, see "Enabling Sign In With Identity Domain Credentials" in *Administering Oracle Cloud Identity Management*.

My environment is configured for SSO. Why do I get password expiry warnings from oraclecloudadmin ww@oracle.com?

You get the password expiry warning because your user account is enabled to maintain identity domain credentials that are required to run some Oracle Enterprise Performance Management Cloud utilities and scripts. Scripts that use EPM Cloud credentials will fail to run after your identity domain password expires.

My scripts do not run after the EPM Cloud password expired. Can I modify an account so that the password never expires?

No. To ensure security, EPM Cloud accounts abide by Oracle's password policy, which causes passwords to expire periodically.

Oracle Cloud notifies users well in advance of password expiration. After changing EPM Cloud password, ensure that you update EPM Automate Utility scripts or recreate the password encryption file so that scripts run successfully.



The EPM Automate Utility displays EPMAT-11 Internal Server Error, Connection timed out. How do I resolve it?

This error is displayed if a connection cannot be established because of a bad URL or invalid proxy settings on the computer.

- Verify that you are using a valid URL
- If your organization requires the use of a proxy server to connect to the internet, verify that the proxy setting in Internet Explorer is accurate. Contact your Network Administrator if you need to add proxy parameters in EPM Automate Utility scripts.

The EPM Automate Utility displays EPMAT-11: Internal Server Error, SSL peer shut down incorrectly. How do I resolve it?

Typically, this error occurs when you run the EPM Automate Utility from Windows Server 2008 machines.

Windows server environments that run a lot of processes may sometimes experience TCP/IP port exhaustion. EPM Automate Utility may not establish a connection to the service if a large number of ports are in TIME\_WAIT state or a smaller number of free ports are available for LISTENING.

See the Microsoft article titled Avoiding TCP/IP Port Exhaustion for detailed information.

The EPM Automate Utility displays EPMAT-11: Unable to connect to URL when connecting from a Linux machine. How do I resolve it?

This error can occur if proxy settings are not specified in environment variables.

On Linux computers, verify that the following environment variables are set. The utility looks for the value of these variable to determine proxy settings:

- proxyHost
- proxyPort
- https.proxyHost
- https.proxyPort

# Monitoring the Service

#### How do I monitor service performance?

Service Administrators can monitor performance through My Services, which provides historic performance metrics. Service Administrators can also view Activity Reports, which helps streamline application design by identifying calculation scripts and user requests that impact application performance. See Monitoring Your Service.

#### Is there a way to performance test an environment under load?

Use the replay EPM Automate Utility command to simulate system load to verify that user experience is acceptable when the service is under a specified load. For example, you can test the user experience on a test environment under a heavy load to ensure that the service will perform well after you migrate the application from the test environment to the production environment.



See these sections in Working with EPM Automate for Oracle Enterprise Performance Management Cloud

- Command Reference
- Preparing to Run the Replay Command

#### Is there an Activity Report in Oracle Enterprise Performance Reporting Cloud?

Activity Report and access logs are not available in Oracle Enterprise Performance Reporting Cloud. However, you can generate a System Audit log, a CSV file, to identify changes to the service over a period of time. See "Performing an Audit" in Administering Oracle Enterprise Performance Reporting Cloud for detailed information.

#### How do I view service details?

Use My Services to view service status, uptime, and utilization data. Additionally, from My Services, you can access service console, environments, and the Oracle store.

See "Viewing Service Details in My Services" in *Managing and Monitoring Oracle Cloud*.

#### How do I monitor notifications related to outages?

Use the My Services Notifications page to monitor ongoing service outages and planned service outages that Oracle schedules for service maintenance. You can filter and sort the list of notifications.

See "Monitoring Notifications" in Managing and Monitoring Oracle Cloud.

How do I ensure that only authorized users can access EPM Cloud environments? How can I ensure that users can only connect using our organization's VPN?

Use a whitelist or blacklist to control access to Oracle Enterprise Performance Management Cloud environments. See these information sources:

- Setting up Network Restricted Access
- Managing Internet Protocol Whitelist and Blacklist Rules in Managing and Monitoring Oracle Cloud.

#### How do I determine the current size of data in an environment?

Use the Details page of the environment in My Services to monitor data size. The details page displays the data size in an environment in these formats:

- Usage trend as a graph
- Usage trend as a table
- Most recent data size in Gigabytes (GB)

To determine the data size:

- 1. Access My Services.
- 2. Click the name of an environment.
- 3. Click Business Metrics.
- Select Size of Data (GB).



See "Monitoring Service Status, Account Balance, and Utilization in a Domain" in *Managing and Monitoring Oracle Cloud*.

#### What contributes to the data size in an environment?

Data size in a service environment is the sum of the following:

- Application data stored in Essbase
- Artifact snapshot created by the daily maintenance process
- Snapshots that you created using Migration and the EPM Automate Utility
- Snapshots that you uploaded using Migration and the EPM Automate Utility
- Data and metadata files that you uploaded using Migration and the EPM Automate Utility

#### What is the maximum allowed data size in an environment?

The default maximum size of your environment is 150 GB; you can purchase additional storage to extend this limit. Please see your Order Documents for details of your purchased subscriptions.

Your service will work after the data size reaches the 150 GB limit. Oracle may remind you to reduce the data size when it exceeds 150 GB. You can reduce the data size by deleting unnecessary snapshots, metadata, and data files from the service.

Services other than Oracle Enterprise Performance Reporting Cloud can use the deletefile command to remove unnecessay files from an environment. See "Command Reference" in Working with EPM Automate for Oracle Enterprise Performance Management Cloud.

# Managing User Accounts

#### If my service is configured for SSO, does EPM Cloud manage user passwords?

If the service is configured for SSO, Oracle Enterprise Performance Management Cloud user names and passwords, and password policies, are managed by the directory server of your organization.

Service Administrators who need to access clients, such as EPM Automate Utility, must have EPM Cloud accounts enabled for identity domain credentials. For these accounts, EPM Cloud maintains passwords, which must abide by EPM Cloud password policies.

My service is not configured for SSO. Is there a way to ensure that EPM Cloud password policies mirror that of my company?

No. EPM Cloud password policies cannot be changed to mirror the policies of an organization.

# **Client Compatibility**

#### How do I determine if users are using a recommended browser?

Use the Activity Report to track browser usage. This report lists the following:



- Browsers with unsupported versions and the number of users who used them
- Versions of the browsers that were used to access the service and the number of users who used them

Use these information sources:

- See Viewing and Downloading Activity Reports and Access Logs.
- For a list of recommended browsers, see Supported Browsers.

#### How do I track the version of Smart View being used?

Use the Activity Report to track Oracle Smart View for Office usage. This report lists the following:

- Smart View versions being used and the number of users who use them
- The 10 most active Smart View users who do not use the current version of Smart View

See Viewing and Downloading Activity Reports and Access Logs.

### **Best Practices for Production Environments**

Oracle recommends that all activities related to building and fine-tuning, and testing applications be performed in the test environment before migrating fully tested applications from the test to the production environment.

#### **Use Maintenance Mode while Performing Administrative Tasks**

The maintenance mode is a state in which only Service Administrators can perform tasks within the application; all other users are locked out. Active users are signed out, which may result in losing unsaved data. The application remains in maintenance mode until a Service Administrator returns it to regular use by turning off the maintenance mode. See

To avoid data loss when an environment goes into maintenance mode, Oracle recommends that Service Administrators communicate the planned invocation of maintenance mode to users, advising them how to avoid losing unsaved data.

The following administration tasks, which consume a sizable amount of available computing resources, must be performed in maintenance mode.

- Adding a cube
- Refreshing cubes
- Restructuring an application
- Loading metadata
- Loading data

#### Limit the number of users who have Service Administrator role

Grant the Service Administrator role, the most powerful role in Oracle Enterprise Performance Management Cloud, to only very few users. If required, use application-level provisioning to augment the privileges of users to allow them to perform tasks that are not permitted by their role assignment in identity domain.

See Managing Application-Level Provisioning for details.



# **Understanding the Patching Process**

Oracle may issue the following patches after deploying monthly updates to your environments:

- One-off patch to an environment
- Weekly patch

#### **One-Off Patch**

A one-off patch may be deployed to an environment to address a regression issue if the Oracle Enterprise Performance Management Cloud development team is able to verify a service request that identifies a regression issue within the first week after the environment is updated in the monthly cycle.

#### **Weekly Patch**

A weekly patch deals with these situations:

- The EPM Cloud development team determines that a service request, which is filed in the first week after the environment is updated in the monthly cycle, identifies a non-regression issue
- More than ten environments are impacted by the reported issue

Despite the findings of the EPM Cloud development team, you may request a one-off patch for important issues that affect an environment. Oracle will evaluate such requests on a case-by-case basis before issuing an appropriate patch.

#### What Happens After Patching an Environment?

After fixing an issue by applying a one-off patch to a monthly update, the environment will be merged into the mainline EPM Cloud distribution during the next monthly update cycle. Oracle will not ask for explicit approval before merging the environment into the mainline.

#### Can I ask Oracle Not to Merge an Environment into the Mainline?

You can ask, through the service request, which explains the business justification for the delay, to delay the merging of an environment into the mainline. Oracle service team will follow up with you to process such requests. If you do not specify a time for merging the patch into the mainline, Oracle will merge the patch into the mainline in the next monthly cycle after the issue is fixed.

