

## (24B) FreeForm Implementation LVC

Oracle Enterprise Performance Management Cloud

DURATION

**2 Days**

MODULES

**19 Lectures**

COURSE CODE

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### Course Overview

After completing this course, you should be able to: Create and manage a FreeForm application Manage dimensions, metadata, and data Load and enter data Report on data Set up application security Manage business rules Administer FreeForm in Smart View

### What You Will Learn

#### FreeForm Overview

- Course Objectives
- Course Agenda
- Lesson Objectives
- Oracle Cloud Enterprise Performance Management Overview
- Cloud EPM Standard and Enterprise Services
- About FreeForm
- Benefits and Features
- FAQ
- Multidimensional Analysis
- About Cubes and Dimensions
- Cube Types
- Comparing Single Cube to Multicube
- Overview of Clients and Tools
- FreeForm Business Case
- Accessing the FreeForm Environment
- Summary

#### Designing a FreeForm Application

- Lesson Objectives
- FreeForm Implementation Process
- Analyzing and Planning Implementations

- Application Design
- Dimensions: Overview
- Identifying Dimensions
- Dimensionality Options and Applicable Use Cases
- Attribute Dimensions
- User-Defined Attributes (UDAs)
- Checklist for Implementing FreeForm
- Summary

## Navigating FreeForm

- Lesson Objectives
- Logging On to FreeForm
- Navigating from the Home Page
- Exploring the Navigator Menu
- About the Application Cluster
- Reviewing Application Properties
- Reviewing Application Settings
- Valid and Invalid Intersections
- Cell-Level Security
- Data Exchange: Data Integration
- Data Exchange: Data Maps
- Managing Jobs
- Data Entry: Overview
- Business Rules: Overview
- Setting Up User Preferences
- Managing Connections
- Summary
- Practice 3

## Creating FreeForm Applications

- Lesson Objectives
- Creating the FreeForm Application: Overview
- Selecting the FreeForm Business Process
- Creating an Application with an Outline File or Snapshot
- Creating an Application with the Application Creation Wizard
- Calculation and Reporting Cubes
- Managing Cubes
- Clearing Cubes
- Viewing Cube Details
- Improving Cube Performance
- Active and Passive Cubes
- Summary
- Practice 4

## Designing Dimensions

- Objectives
- About Dimensions and Members
- About Dimensions and Members (continued)
- Default Dimensions and Dimension Types
- Default Dimensions (continued)
- Custom Dimensions
- User-Defined Elements
- Design Considerations for Attributes and UDAs
- Design Considerations for Attributes and UDAs (continued)
- Smart Lists: Overview
- Sparse and Dense Dimensions
- Label-Only Members
- Dimension and Member Names
- Dimension Properties
- Member Properties
- About Member Aliases
- About Dimension Hierarchies: Genealogy
- About Dimension Hierarchies: Generations and Levels
- Property Value Inheritance
- Alternate Hierarchies
- Designing Account Member Hierarchies
- Consolidation Order
- Dimension Calculation Order
- Period Aggregations
- Member Formulas
- Data Storage Options
- Customizing Time Dimensions
- Period-to-Date Hierarchies
- Performance Settings and Data Type Evaluation Order
- Performance Settings and Data Type Evaluation Order (continued)
- Enhancing Accounts Dimensions
- Enhancing Accounts Dimensions (continued)
- Summary
- Practice 5

## Managing Dimensions

- Objectives
- Managing Dimensions and Members
- Creating Dimensions
- Modifying Dimensions
- Creating Members
- Creating Shared Members
- Modifying Members

- Modifying Members (continued)
- Moving Members
- Sorting Members
- Finding Members
- Deleting Members
- Creating Aliases
- Summary
- Practices 6

## Setting Up User-Defined Elements

- Objectives
- Creating Member Formulas
- Creating Attributes
- Creating Attributes (continued)
- Assigning Attribute Values
- Adding User-Defined Attributes
- Adding User-Defined Attributes (continued)
- Managing Substitution Variables
- Managing Substitution Variables (continued)
- Managing User Variables
- Managing User Variables (continued)
- Creating Smart Lists
- Creating Smart Lists (continued)
- Associating Smart Lists with Members
- Forms and Smart Lists
- Summary
- Practices 7

## Importing and Exporting Metadata

- Objectives
- Metadata Import Export: Overview
- Metadata Import File Structure
- Loading the Import File
- Delimiters
- Importing Metadata: Creating Imports
- Importing Metadata (continued)
- Saving Jobs to Import Metadata
- Saving Jobs to Import Metadata (continued)
- Scheduling Jobs to Import Metadata
- Scheduling Jobs to Import Metadata (continued)
- Exporting Metadata: Creating Exports
- Exporting Metadata: Creating Exports (continued)
- Creating Jobs to Export Metadata
- Creating Jobs to Export Metadata (continued)
- Scheduling Jobs to Export Metadata

- Scheduling Jobs to Export Metadata (continued)
- Summary
- Practices 8

## Loading and Calculating Data

- Objectives
- Data Load Options
- Managing FreeForm Data
- Setting Up the Load File
- Importing Data Overview
- Validating Data Imports
- Importing Data
- Importing Data (continued)
- Scheduling Data Imports
- Scheduling Data Imports (continued)
- Exporting Data
- Exporting Data (continued)
- Scheduling Data Exports
- Scheduling Data Exports (continued)
- Data Calculations
- Member Rollups
- Data Blocks
- Member Formulas
- Business Rules: Overview
- Summary
- Practices 9

## Setting Up Application Security

- Lesson Objectives
- FreeForm Security: Overview
- User Authentication and Global Roles
- Application Roles
- Managing Users
- Data and Artifact Security
- Valid Intersections: Overview
- Valid Intersection Groups
- Valid Intersection Rules
- Invalid Data and Invalid Intersection Reports
- Cell-Level Security Rules
- Cell-Level Security Definition
- User and Group Security
- Managing Groups
- Managing User Group Assignments
- Assigning Roles to FreeForm Users and Groups
- Exporting Users and Groups

- Generating Provisioning Reports
- Assigning Access Permissions
- Dimension and Member Security
- Access Options
- Inheritance Options
- Precedence and Inheritance of Access Permissions
- Reporting on Access Permissions
- Summary
- Practices 10

## Creating Forms

- Lesson Objectives
- Forms: Overview
- Form Components
- Form Design Considerations
- Designing Forms
- Setting Up the Form Layout
- Setting Up Properties
- Selecting Members
- Setting Up Other Options
- Setting Up Other Options (continued)
- Assigning Business Rules
- Setting Up Smart Push
- Creating Rolling Forecasts
- Modifying Rolling Forecast Variables
- Creating Formula Rows and Columns
- Creating Menus
- Creating Menus (continued)
- Building Validation Rules
- Processing Cells for Data Validation
- Exporting and Importing Forms
- Summary
- Practice 11

## Creating Dashboards

- Lesson Objectives
- Dashboards
- Viewing Dashboards
- Designing Dashboards
- Creating Dashboards
- Design Consideration for Dashboards
- Quick Analysis
- Exporting and Importing Dashboards
- Summary
- Practice 12

## Managing Business Rules

- Lesson Objectives
- Business Rules Overview
- Calculation Manager Overview
- Business Rule Creation Process
- Determining Calculation Requirements
- Launching Calculation Manager
- Rule Designer Components
- Formula Components
- Variables
- Script, Condition, and Loop Components
- Templates Overview
- Setting Up the Clear Data Template
- Setting Up the Copy Data Template
- Setting Up the Amount-Unit-Rate Template
- Setting Up the Allocate - Level to Level Template
- Setting Up the Allocation Template
- Setting Up the Aggregation Template
- Setting Up the Currency Conversion Template
- SET Commands Template
- Creating Custom-Defined Templates
- Creating Business Rules and Rulesets
- Validating and Deploying Rules
- Assigning Business Rule Security
- Launching Business Rules from Forms
- Launching Business Rules from Task Lists
- Launching Business Rules from the Rules Card
- Summary
- Practice 13

## Setting Up Groovy Rules

- Lesson Objectives
- Groovy Overview
- Groovy in Cloud EPM
- Creating Groovy Business Rules
- Groovy Script Basics
- Summary
- Practice 14

## Entering FreeForm Data

- Lesson Objectives
- Forms Overview
- Navigation Keys
- Navigating Forms with Menus

- Visual Cues in Forms
- Viewing Member Formulas
- Viewing Consolidation Operators
- Identifying Date Fields, Text Fields, and Smart Lists
- Data Actions
- Editing Data
- Adding Comments and Attachments
- Adding Line Item Details
- Adjusting Data
- Adjusting Data with Quick Commands
- Spreading Data
- Spreading Data by Using Grid Spread
- Spreading Data by Using Mass Allocate
- Filtering and Sorting Data
- Saving and Refreshing Data
- Pushing Data
- Running Business Rules
- Performing Ad Hoc Actions
- Creating an Ad Hoc Grid
- Ad Hoc Grid Properties
- Ad Hoc Options
- Summary
- Practice 15

## Reporting on Data

- Lesson Objectives
- Cloud EPM Reports Overview
- Design Features
- Considerations
- Navigating Reports
- Report Security
- Designing Reports
- Designing Reports (continued)
- About Connections and Data Sources
- Report Components and Objects
- Creating Reports
- Report and Object Properties
- General Properties
- Layout Properties
- Report Designer Layout
- About the Report Data Point of View
- Adding Report Sheets
- Inserting Report Objects
- Adding Text Boxes
- Inserting Text Functions

- Inserting Images
- Adding Grids
- Grid Designer
- Setting the Grid POV
- Managing Grid Rows and Columns
- Grouping Data and Non-Data Segments
- Formulas and Calculations in Grids
- Conditional Formatting, Text, and Suppression
- Zooming and Drilling to Content
- Drilling Through to the Source
- Adding Charts
- Chart Designer
- About Shared Report and Objects
- About Shared Report and Objects (continued)
- Considerations for Shared Reports and Objects
- Considerations for Shared Reports and Objects (continued)
- Managing Report Objects
- Correcting Report Errors
- Viewing Reports
- About Books
- About Bursting
- Migrating Financial Reports
- Summary
- Practices 16

## Managing Navigation Flows

- Lesson Objectives
- Navigation Flow Overview
- Exploring the Default Navigation Flow
- Interface Customization
- Customization Categories
- Permissions
- Managing Navigation Flows
- Creating a Navigation Flow
- Adding Clusters, Cards, and Tabs
- Organizing Clusters, Cards, and Tabs
- Activating and Switching Navigation Flows
- Embedding Third-Party URLs
- Summary
- Practice 17

## Maintaining FreeForm

- Lesson Objectives
- Maintaining Application Overview
- Migration

- Selecting Artifacts and Running Migrations
- Reviewing Migration Status Reports
- Monitoring Applications
- Cloning FreeForm Environment
- Steps to Cloning FreeForm
- Tasks to Perform After Cloning Environment
- Setting Up Data Maps
- Creating Data Maps
- Managing Data Maps
- Running Data Maps
- Adding Data Maps to Forms
- Performing Application Diagnostics
- Summary
- Practices 18

## Administering FreeForm in Smart View

- Lesson Objectives
- Smart View Introduction
- Downloading the Smart View Client and Extensions
- Smart View Ribbon and Panel
- Application Templates
- Creating a FreeForm Application
- Adding Artifacts Using the Application Template
- Adding Artifacts Using the Application Template (continued)
- Updating FreeForm Applications in Smart View
- Managing Dimensions in Smart View
- Managing Forms and Dashboards in Excel
- Summary