Contents

Documentation Accessibility .................................................. 7

Documentation Feedback ..................................................... 9

Chapter 1. EPM System Standard Deployment Overview ..................... 11
  About Standard Deployment .............................................. 11
  Standard Deployment Topology ....................................... 11
  Deployment Directory Structure and Location Reference ............... 12
  Deployment Approach ............................................... 13
  Deployment Scenarios ............................................... 14

Chapter 2. Deployment Requirements ........................................ 17
  Minimum Server Specifications .................................... 17
  Server Requirements ............................................... 18
    Oracle Client .................................................. 18
    Microsoft Office ........................................ 18
    .NET Framework ........................................ 18
    Operating System Firewall .................................. 18
    User Access Control ........................................ 18
  Deployment User Requirements ................................... 19
  Shared File System Requirements .................................. 20
  Host Name Resolution Requirements ................................ 20
  Clock Synchronization ............................................ 21
  Environment Details ............................................. 21

Chapter 3. Setting Up Oracle Database .................................... 23
  Database Settings ................................................. 23
  Database Accounts for EPM System Deployment ....................... 23
    Database Roles and Privileges for EPM System Accounts ........ 23
    Other Settings ............................................... 24
  Database Checklist ............................................. 24
Chapter 4. Setting Up Network ........................................................ 25
  Firewall Setup ................................................................. 25
  Virtual Hosts Setup .......................................................... 25
    External Virtual Host .................................................... 26
    Internal Virtual Host .................................................... 26
  Setting Up the Load Balancer ............................................. 26

Chapter 5. Downloading and Extracting EPM System Software .............. 27
  Downloading EPM System Software ........................................ 27
  Extracting EPM System Software .......................................... 28

Chapter 6. Installing and Configuring EPM System: New Deployments .... 31
  Prerequisites ......................................................................... 31
  Installing and Configuring Foundation Services on FNDHOST1 ........ 31
  Installing and Configuring Planning on PLANHOST1 .................. 45
  Installing and Configuring Essbase Server on ESSHOST1 .......... 54
  Installing and Configuring Financial Management Server on HFMHOST1 . 61
  Installing and Configuring Financial Management Web Application on HFMWEBHOST1 ............................................. 69
  Installing and Configuring FDM on FDMHOST1 ...................... 78

Chapter 7. Configuring EPM System Web Server ................................ 85
  Configuring the Web Server ................................................. 85
  Performing Postconfiguration Tasks ....................................... 87
    Refreshing EPM Workspace ............................................ 87
    Validating the Deployment ............................................. 88

Chapter 8. Scaling Out Application Tier ........................................ 91
  Scaling Out Foundation Services ........................................... 91
  Scaling Out Planning ..................................................... 101
  Scaling Out Financial Management Server ................................ 101
  Scaling out Financial Management and FDM Web Applications .......... 102
  Scaling Out FDM Server .................................................. 102
  Scaling out Essbase Server ............................................... 102
  Configuring the Web Server ............................................. 103
  Generating Deployment Report .......................................... 103

Chapter 9. Installing EPM System Clients ....................................... 105
  Installing Smart View ..................................................... 105
  Installing Financial Reporting Studio .................................... 106
  Installing Administration Services Console .......................... 106
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 have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.
Documentation Feedback

Send feedback on this documentation to: epmdoc_ww@oracle.com

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 - http://www.youtube.com/user/OracleEPMWebcasts
About Standard Deployment

Oracle Enterprise Performance Management System standard deployment is Oracle’s best practice approach for deploying EPM System products. This approach is based on creating a base deployment of the product and then scaling out the services to handle the needed capacity. This process, described using the Microsoft Windows 2008 R2 operating system and Oracle database 11g, is applicable to all supported databases and operating systems after adjustments specific to the operating system and database being used.

Standard Deployment Topology

The standard deployment topology is depicted in the following illustration. This deployment consists of different components that can be scaled out separately.
Oracle recommends that you set up a base deployment with one server for each component, validate that it is working, and then scale out each component, depending on your high-availability and system-load requirements.

**Deployment Directory Structure and Location Reference**

The following illustration shows the enterprise deployment directory structure on each server. Binaries and configuration files for each EPM System component are located only on the server on which the component is installed. For example, Oracle Essbase binaries and configuration files, along with Essbase data directory (not shown in the illustration), are located on the Essbase host machine (ESSHOST1 in the deployment diagram).
Data directories of EPM System products other than Essbase are located on a shared disk that must be accessible from all the servers in the deployment. Because EPM System components are not installed on the shared disk, the shared disk does not have the directory structure depicted in the illustration. The shared disk hosts data directories for:

- Oracle Hyperion Reporting and Analysis Repository directory
- Exported or imported artifacts using Oracle Hyperion Enterprise Performance Management System Lifecycle Management

This document refers to the following installation and deployment locations:

- **MIDDLEWARE_HOME** refers to the location of middleware components such as Oracle WebLogic Server, Oracle HTTP Server, Java, and, optionally, one **EPM_ORACLE_HOME** or more. The **MIDDLEWARE_HOME** is defined during EPM System product installation. The default **MIDDLEWARE_HOME** directory is Oracle/Middleware.

- **EPM_ORACLE_HOME** refers to the installation directory containing the files required to support EPM System products. **EPM_ORACLE_HOME** resides within **MIDDLEWARE_HOME**. The default **EPM_ORACLE_HOME** is **MIDDLEWARE_HOME**/EPMSYS11R1; for example, Oracle/Middleware/EPMSYS11R1.

- **EPM_ORACLE_INSTANCE** denotes a location that is defined during the configuration process where some products deploy components. The default location is **EPM_ORACLE_INSTANCE** is **MIDDLEWARE_HOME**/user_projects/emsystem1; for example, Oracle/Middleware/user_projects/emsystem1.

- **WEBLOGIC_DOMAIN_HOME** refers to the directory that contains the WebLogic Server domain configuration for EPM System.

## Deployment Approach

Oracle recommends a modular deployment approach, depicted in the following illustration, to facilitate the verification of each EPM System component.
This approach simplifies troubleshooting during the setup process and facilitates configuration. The tasks that must be performed to complete each module in this deployment process are discussed in this document.

**Deployment Scenarios**

Before starting the EPM System setup process, you must complete the required server, database, and network setup process appropriate for your deployment strategy.
<table>
<thead>
<tr>
<th>Scenario</th>
<th>Deployment Instructions to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Set up base working environments</strong></td>
<td></td>
</tr>
<tr>
<td>Set Up Oracle Hyperion Planning</td>
<td>- “Installing and Configuring Foundation Services on FNDHOST1” on page 31</td>
</tr>
<tr>
<td></td>
<td>- “Installing and Configuring Planning on PLANHOST1” on page 45</td>
</tr>
<tr>
<td></td>
<td>- “Installing and Configuring Essbase Server on ESSHOST1” on page 54</td>
</tr>
<tr>
<td>Set Up Consolidation</td>
<td>- “Installing and Configuring Foundation Services on FNDHOST1” on page 31</td>
</tr>
<tr>
<td></td>
<td>- “Installing and Configuring Financial Management Server on HFMHOST1” on page 61</td>
</tr>
<tr>
<td></td>
<td>- “Installing and Configuring Financial Management Web Application on HFMWEBHOST1” on page 69</td>
</tr>
<tr>
<td></td>
<td>- “Installing and Configuring FDM on FDMHOST1” on page 78</td>
</tr>
<tr>
<td><strong>Add products to an existing environment</strong></td>
<td></td>
</tr>
<tr>
<td>Add Consolidation to Planning</td>
<td>- “Installing and Configuring Financial Management Server on HFMHOST1” on page 61</td>
</tr>
<tr>
<td></td>
<td>- “Installing and Configuring Financial Management Web Application on HFMWEBHOST1” on page 69</td>
</tr>
<tr>
<td></td>
<td>- “Installing and Configuring FDM on FDMHOST1” on page 78</td>
</tr>
<tr>
<td>Add Planning to Consolidation</td>
<td>- “Installing and Configuring Planning on PLANHOST1” on page 45</td>
</tr>
<tr>
<td></td>
<td>- “Installing and Configuring Essbase Server on ESSHOST1” on page 54</td>
</tr>
</tbody>
</table>
Minimum Server Specifications

The “Standard Deployment Topology” on page 11 uses these servers, which have the Microsoft Windows 2008 R2 operating system installed. The server names indicated in this table are used throughout this document to identify specific servers involved in the deployment.

<table>
<thead>
<tr>
<th>EPM System Component</th>
<th>Machine</th>
<th>Processor</th>
<th>Memory</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Hyperion Foundation Services</td>
<td>FNDHOST1</td>
<td>4 core 2 CPU</td>
<td>16 GB</td>
</tr>
<tr>
<td>Planning</td>
<td>PLANHOST1</td>
<td>4 core 2 CPU</td>
<td>12 GB</td>
</tr>
<tr>
<td>Essbase</td>
<td>ESSHOST1</td>
<td>4 core 2 CPU</td>
<td>16 GB</td>
</tr>
<tr>
<td>Oracle Hyperion Financial Management Server</td>
<td>HFMHOST1</td>
<td>4 core 2 CPU</td>
<td>16 GB</td>
</tr>
<tr>
<td>Financial Management Web</td>
<td>HFMWEBHOST1</td>
<td>4 core 2 CPU</td>
<td>12 GB</td>
</tr>
<tr>
<td>Oracle Hyperion Financial Data Quality Management Server</td>
<td>FDMHOST1</td>
<td>4 core 2 CPU</td>
<td>16 GB</td>
</tr>
</tbody>
</table>
Server Requirements

Subtopics

- Oracle Client
- Microsoft Office
- .NET Framework
- Operating System Firewall
- User Access Control

Oracle Client

Oracle Client Runtime 11.2.0.1 must be installed on each server.

Excepting the server that hosts the FDM Server, you must install the 64-bit Oracle Database client on all servers. You must install the 32-bit Oracle Database client on servers that host the FDM Server (FDMHOST1).

Microsoft Office

Microsoft Office 2010 must be installed on the FDM Server (FDMHOST1) and client machines that host Oracle Hyperion Smart View for Office.

.NET Framework

.NET Framework 3.5 must be installed on client machines that host Smart View.

Operating System Firewall

You must disable the operating system firewalls on the servers in the deployment. Refer to your Windows documentation for information on disabling the operating system firewall.

User Access Control

Disable User Access Control (UAC) on each deployment server.

To disable UAC:

1. Select Start, then Control Panel, then User Accounts, then User Accounts, and then Change User Account Control settings.
2. In User Account Control Settings, ensure that the slider is set to Never Notify.
Deployment User Requirements

All EPM System components should be installed from a generic Windows user account (an account that does not belong to a specific user). All patches for this deployment must be run using the user account that was used to install EPM System.

The deployment user account is referred to as the deployment account in this document. This user account should satisfy the following requirements:

- The deployment account is a member of the Administrators group on the server.
- User account control is disabled for the deployment account.
- The following local security policies are assigned to the deployment account:
  - Act as part of the operating system
  - Bypass traverse checking
  - Log on as a batch job
  - Log on as a service

To view local security policy assignments on a server, select Start, then Administrative Tools, then Local Security Policy, then Local Policies, and then User Rights Assignment.
Shared File System Requirements

A shared file system that is accessible from all the servers in the deployment is required to host these components:

- Installation files
- Reporting and Analysis Repository data
- Artifacts for Lifecycle Management in Oracle Hyperion Shared Services

The shared file system could be a share on a NAS/SAN or on one of the Windows servers. The deployment account must have read-write access to the shared file system. In the rest of this document, this shared location is referred to as `\SharedHost\SharedLocation`.

Host Name Resolution Requirements

The canonical host name of each server must be the same when accessed from within the server and from other servers in the deployment. You may want to create a local hosts file on each server to resolve host name issues.

EPM System uses Java's canonical host name resolution for resolving host names. To validate host names as resolved by Java, EPM System provides a utility (`epmsys_hostname.bat`). An archive of the utility (`epmsys_hostname.zip`) is available in the directory where you unzip the part numbers to install EPM System. See Chapter 5, “Downloading and Extracting EPM System Software” for instructions.
Clock Synchronization

The clock on each server must be synchronized to within one second difference. To synchronize clocks, point each server to the same network time server. Refer to your operating system documentation for more information.

Environment Details

Use this section to record the details for your environment.

Table 3  Deployment Environment Checklist

<table>
<thead>
<tr>
<th>Item</th>
<th>Value for Your Deployment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Deployment Account Checklist</strong></td>
<td></td>
</tr>
<tr>
<td>Deployment account to log in to server machines</td>
<td></td>
</tr>
<tr>
<td>Password of the deployment user</td>
<td></td>
</tr>
<tr>
<td><strong>Shared Disk Checklist</strong></td>
<td></td>
</tr>
<tr>
<td>Location of shared disk</td>
<td></td>
</tr>
</tbody>
</table>

Table 4  Environment Checklist

<table>
<thead>
<tr>
<th>Host For</th>
<th>Host Name</th>
<th>Server Roles Set?</th>
<th>User Roles Set?</th>
<th>Host Names Resolved?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation Services</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Essbase</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Management Server</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Management Web</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM System Clients</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Setting Up Oracle Database

In This Chapter

Database Settings ......................................................................................... 23
Database Accounts for EPM System Deployment ...................................................... 23
Database Checklist ........................................................................................ 24

Database Settings
Create an Oracle 11g database with AL32UTF8 character set encoding, and set the following database parameters:

- Number of process 600
- Number of Sessions 750

Database Accounts for EPM System Deployment
Create the following database accounts to support new EPM System deployments:

- One account for EPM System Repository
- One account for Financial Management
- One account for FDM application
  Each FDM application requires a separate database account. Before creating an FDM application, you must create a new database account for it.
- One account for a Planning application
  Each Planning application requires a separate database account. Before creating a Planning application, you must create a database account for it.

Database Roles and Privileges for EPM System Accounts

- CREATE SESSION
- CREATE VIEW
- CREATE TYPE
- CREATE TABLE
CREATE CLUSTER
CREATE TRIGGER
CREATE SEQUENCE
CREATE INDEXTYPE
CREATE PROCEDURE
CREATE ANY SYNONYM
DROP ANY SYNONYM
UNLIMITED TABLESPACE

Other Settings
- EPM System database accounts must be created in a tablespace with a minimum initial capacity of 1 GB
- Extends by 500 MB
- Auto Extend set to ON
- Minimum 1 GB temporary tablespace

Database Checklist

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Database Host</th>
<th>Database Port</th>
<th>Service Name</th>
<th>User Account</th>
<th>Account Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPM System Repository</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning Application Database</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Financial Management Application Database</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>FDM Application Database</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
In This Chapter

Firewall Setup .............................................................................................. 25
Virtual Hosts Setup ........................................................................................ 25
Setting Up the Load Balancer ............................................................................ 26

Firewall Setup

The following firewall ports must be opened for EPM System:

Table 6  Default Firewall Ports for EPM System

<table>
<thead>
<tr>
<th>Firewall</th>
<th>Ports to Open</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web-tier Firewall</td>
<td>443 (SSL Port)</td>
<td></td>
</tr>
<tr>
<td>Application-tier Firewall</td>
<td>19000 (Oracle HTTP Server Port)</td>
<td></td>
</tr>
<tr>
<td>Application-tier Firewall (Thick-client access)</td>
<td>19000 (Oracle HTTP Server Port)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>1423 (Essbase Server/Agent Port)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>32768-33768 (Essbase Databases Ports)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8205-8209 (Oracle Hyperion Financial Reporting Studio RMI Ports)</td>
<td></td>
</tr>
<tr>
<td>Database-tier Firewall</td>
<td>1521</td>
<td></td>
</tr>
</tbody>
</table>

1Default ports are listed.

Virtual Hosts Setup

Subtopics

- **External Virtual Host**
- **Internal Virtual Host**

EPM System standard deployment topology requires a load balancer; for example, F5 BIG-IP Traffic Manager, Citrix NetScaler, or Cisco ACE A10. You must create two virtual hosts on the load balancer to support the standard deployment topology. These virtual hosts are used to receive and manage external and internal requests for EPM System resources.
External Virtual Host

Create a virtual host (epm.mycompany.com) on the load balancer as the access point for all HTTP traffic to runtime components. The traffic from browser to load balancer is always over secure socket layer (SSL). This virtual host receives all external requests (from the intranet and the Internet) on port 443 and forwards them to an Oracle HTTP Server on Foundation Services servers (FNDHOST1 or FNDHOST2).

For information on configuring the load balancer to forward external requests to Oracle HTTP Server, refer to the documentation of the load balancer you are using.

Internal Virtual Host

Standard deployment topology uses a virtual host (epminternal.mycompany.com), which is used for interprocess transactional and administrative access.

This virtual host is defined on the load balancer and is used for internal invocations of services within the data center. It is not exposed to the internet or the intranet, and it is accessible within the data center only. It forwards requests to one of the Oracle HTTP Servers on Foundation Services servers (FNDHOST1 or FNDHOST2).

For information on configuring the load balancer to forward requests to Oracle HTTP Servers, refer to the documentation of the load balancer you are using.

Setting Up the Load Balancer

Configure the load balancer to route requests from the virtual hosts (epm.mycompany.com and epminternal.mycompany.com) to one of the Oracle HTTP Servers on Foundation Services servers (FNDHOST1 or FNDHOST2). These routings must be sticky.

To configure the load balancer with virtual hosts created for this deployment, refer to the instructions provided by the vendor of your load balancer.
In This Chapter

Downloading EPM System Software ................................................................. 27
Extracting EPM System Software ................................................................. 28

5

Downloading EPM System Software

To download part numbers for standard deployment:

2. In Oracle Software Delivery Cloud, click Sign In/Register.
3. In Sign In, enter your Oracle Software Delivery Cloud user name and password, and then click Sign In.
4. In Terms and Restrictions, read and accept the Trial License and Export Restrictions agreements, and then click Continue.
5. In Media Pack Search, complete these steps:
   b. In Platform, select Microsoft Windows x64 (64-bit).
   c. Click Go.
   d. In Results, select Oracle Enterprise Performance Management (11.1.2.2.0) Media Pack for Microsoft Windows x64 (64-bit).
   e. Click Continue.
Download the part numbers listed in Table 7 into a location on the shared disk; for example, into `\sharedhost\sharedlocation\downloads`.

### Table 7  EPM System Part Numbers for Standard Deployment

<table>
<thead>
<tr>
<th>Description</th>
<th>Release</th>
<th>Part Number</th>
<th>Updated</th>
<th># Parts / Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPM System Release 11.1.2.2.0 for Microsoft Windows (64-bit) Part 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.2.0 for Microsoft Windows (64-bit) Part 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.2.0 for Microsoft Windows (64-bit) Part 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.2.0 for Microsoft Windows (64-bit) Part 4</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.2.0 for Microsoft Windows (64-bit) Part 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.2.0 for Microsoft Windows (64-bit) Part 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.2.0 Client Installers for Microsoft Windows</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.2.0 for Microsoft Windows (64-bit) Oracle HTTP Server</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Extracting EPM System Software

On the shared disk, unzip the downloaded EPM System part number archives into a directory (for example, `epm_unzipped`). Using a program such as Winzip or 7-Zip, you can unzip each archive separately. If you are using 7-Zip, you can execute the following command from a command window to unzip all the part number archives in the download folder (for example, from `\downloads`, which is mapped to `\sharedhost\sharedlocation\downloads`):

```
Z:\downloads> for %i in (*.zip) do unzip -u -o %i -d epm_unzipped
```
After unzipping, the `epm_unzipped` directory is similar to this screen shot.
Prerequisites

Before you start, ensure that you have the following:

- Required servers and the deployment account that can access them
- Database connection information (host name, port, and service name) to use during the setup
- Database user accounts (user names and passwords) to use
- Access to shared disk for storing downloaded EPM System software, the repository for Oracle Hyperion Reporting and Analysis, and Lifecycle Management artifacts

Installing and Configuring Foundation Services on FNDHOST1

1. On the Foundation Services host machine (FNDHOST1), define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).
2. From the mapped network drive, launch installTool.cmd.
3. In EPM System Installer 11.1.2.2, select a language, and then click OK.
4 On the Welcome screen, click **Next**.

5 If you want to install EPM System software in a location other than the default location, select that location in the Destination screen, and then click **Next**.

6 In Installation Type, click **Next**.
In Product Selection, clear the selection (uncheck) from **Uncheck All**, and then select the following components to install:

Although you may not use all these components, installing them prepares the WebLogic domain to host the Java web applications of these components in the future.

- Foundation Services
- Essbase—Administration Services Web Application
- Essbase—Provider Services Web Application
- Reporting and Analysis—Framework
- Reporting and Analysis—Financial Reporting
- Planning
- Financial Close Management
- Disclosure Management
- Financial Management—Financial Management Web Applications
- Profitability and Cost Management

Clear (uncheck) the following component, which is automatically selected when you select Planning:

- Essbase—Essbase Server
In Confirmation, click Next to begin the installation of the selected components on FNDHOST1.
9 In Summary, click **Configure** after verifying that all components installed successfully.

![Image of the EPM System Installer](image)

10 In Oracle Instance, complete these steps, and then click **Next**.
   
a. Optional: In **Home directory for EPM Oracle instance**, change the location of EPM Oracle Home directory.

   ![Image of EPM System Configuration](image)

b. In **EPM Oracle instance name**, enter **FOUNDATION1**.

11 On the database configuration screen, enter the connection information for EPM System Repository and the user name and password of the database account to use for accessing the database (recorded in Table 5, “Database Checklist”), and then click **Next**.

![Image of the database configuration screen](image)
EPM System Repository stores the configuration information for all the servers in the deployment so components can find each other.

12 In component configuration screen, uncheck the following components, and then click Next.
- Disclosure Management
- Financial Close
- Financial Management
- Planning
- Profitability and Cost Management

13 In Configure Common Settings, complete these actions, and then click Next.
   a. Select **Run Windows Services as non-local system account**.
   b. In **User name**, enter the deployment account.
c. In **Password**, enter the deployment account password.

d. In **LCM Export/Import Location**, enter the shared disk directory; for example: `\sharedHost\sharedLocation\lcm_export_import`, which will store the Oracle Hyperion Enterprise Performance Management System Lifecycle Management artifacts that will be exported from or imported into this Foundation Services instance.

e. **Optional:** Enter SMTP mail server information.

14 In **Configure Database**, click Next to use the default values to leverage the Foundation Services database for all the products.

15 In **Configure Reporting and Analysis Framework Services**, complete these steps, and then click Next.
a. **In Repository Directory**, enter the shared disk directory; for example: \\SharedHost \SharedLocation\data\RA1, where Oracle Hyperion Reporting and Analysis Framework repository data is to be stored. Do not create this directory; Oracle Hyperion Enterprise Performance Management System Configurator creates it for you.

b. **Optional:** In **Port Range**, change the port range that Oracle Hyperion Reporting and Analysis Framework repository should use.

16 In Deploy to Application Server - Specify WebLogic Domain Information, enter the required information, and then click **Next**.

The WebLogic Server domain for EPM System components and the WebLogic administration server are created on this machine.

a. **Optional:** In **Administrator User**, change the user name of WebLogic Server domain administrator.

b. In **Administrator Password** and **Confirm Administrator Password**, enter a password for WebLogic Server administrator.
17 In Deploy to Application Server: Oracle WebLogic, review the list of web applications that will be deployed to the WebLogic Server domain, and then click Next. The Java web applications listed on this screen are deployed to one managed server.

![Deploy to Application Server: Oracle WebLogic](image1)

18 In Financial Reporting – Configure RMI ports, click Next.

![Financial Reporting – Configure RMI ports](image2)

19 In Configure Web Server, complete these steps, and then click Next.

a. In Web Server Type, select Oracle HTTP Server.

b. Optional: In Web Server Port, change the web server port number.
20 In Oracle Configuration Manager Registration, enter your information, and then click **Next**.

Oracle Configuration Manager notifies you when Oracle issues patches or security alerts. The password that you enter in this screen must match the password associated with your email address on My Oracle Support.

21 In **Set Shared Services Admin User and Password**, enter the password for EPM System administrator, and then click **Next**.

22 In **Confirmation**, review the summary of the configuration tasks that will be executed, and then click **Next**.
23 When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Task Panel.

24 In configuration task selection screen, complete these steps, and then click Next.

   a. Remove the selection (uncheck) from Uncheck All.
   b. Expand Hyperion Foundation task group, and select (check) Configure Logical Address for Web Applications.
In Update the logical address for the Web applications, complete these steps, and then click Next.

a. In Host, enter the name of the virtualhost (epminternal.mycompany.com) that you created for internal communication

b. Optional: In Port and SSL Port, change port numbers.

In Confirmation, click Next.
27 In Summary, click Finish.

28 Increase the JVM memory allocation by setting the default heap size of the managed server to 8GB:

a. On FNDHOST1, open Windows Registry Editor: Select Start and then Run, type regedit, and then click OK.

b. In Registry Editor, select HKEY_LOCAL_MACHINE, then SOFTWARE, then Hyperion Solutions, then EPMServer0, and then HyS9EPMServer.

c. Right-click JVMOptionX (where X is 1, 2, ...) whose value starts with -Xmx, and then select Modify.

d. In Value data, change the data as follows to set the heap size to 8GB:

-Xmx8000m
e. Click OK.

f. Close Registry Editor.

29 Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Foundation Services, and then Start EPM System.

30 Validate that the heap size is set correctly:
   a. Log in to the WebLogic Administration Console using WebLogic administrator credentials. ([http://WebLogic_Admin_Host:WebLogic_Admin_Port/console](http://WebLogic_Admin_Host:WebLogic_Admin_Port/console)).
   b. In the Domain Structure, expand Environment, and then select Servers.
   c. In Summary of Servers, select EPMServer0.
   d. Click the Monitoring tab, and then the Performance tab.
   e. In Java Virtual Machine Memory Utilization Statistics, review the Heap Size Max setting.
31 Validate the installation by logging to Oracle Hyperion Enterprise Performance Management Workspace by accessing the following URL:

http://FNDHOST1:19000/workspace/index.jsp

32 Have your network administrator configure the load balancer to route all requests addressed to epm.mycompany.com and epminternal.mycompany.com to the Oracle HTTP Server installations on the Foundation Services host machine (FNDHOST1).

Installing and Configuring Planning on PLANHOST1

To install and configure Planning on PLANHOST1:

1 Ensure that WebLogic Server Administration Server is running on the Foundation Services host machine (FNDHOST1).

2 On the Planning host machine (PLANHOST1), define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

3 From the mapped network drive, launch installTool.cmd.
4 In EPM System Installer 11.1.2.2, select a language, and then click **OK**.

5 In Welcome, click **Next**.

6 In Destination, specify the `MIDDLEWARE_HOME` directory location exactly as set while deploying Foundation Services on `FNDHOST1`, and then click **Next**.

7 In Installation Type, click **Next**.
8 In Product Selection, complete these steps, and then click Next.
   a. Clear the selection (uncheck) from Uncheck All.
   b. Select Planning.
       When you select Planning, Foundation Services and Essbase are automatically selected.
   c. Remove the selection from (uncheck) Essbase.

9 In Confirmation, click Next to begin the installation of the selected components on PLANHOST1.
10 In Summary, click Configure after verifying that all components installed successfully.

11 In Oracle Instance, complete these steps, and then click Next.
   a. In Home directory for EPM Oracle instance, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on FNDHOST1).
   b. In EPM Oracle instance name, enter PLANNING1.
12 On the database configuration screen, enter the connection information for EPM System Repository and the user name and password of the database account to use for accessing the database (recorded in Table 5, “Database Checklist”), and then click Next.

The data that you enter must match the data that you entered while configuring the EPM System Repository on the Foundation Services server (FNDHOST1).

13 In component configuration, uncheck Configure Web Server under Hyperion Foundation, and then click Next.
14 In Configure Database, click Next to use the default values to leverage the Foundation Services database for Planning.

15 In Deploy to Application Server - Specify WebLogic Domain Information, click Next to deploy Planning to the WebLogic Server domain that you created on the Foundation Services host (FNDHOST1).
In Deploy to Application Server: Oracle WebLogic, click Next to deploy Planning web application.

In Confirmation, review the summary of the configuration tasks that will be executed, and then click Next.
18 When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Finish.

19 Increase the JVM memory allocation by setting the default heap size of the managed server to 8GB:

a. On PLANHOST1, open Windows Registry Editor: Select Start and then Run, type regedit, and then click OK.

b. In Registry Editor, select HKEY_LOCAL_MACHINE, then SOFTWARE, then Hyperion Solutions, then Planning0, and then HyS9Planning.

c. Right-click JVMOptionX (where X is 1, 2, ...) whose value starts with -Xmx, and then select Modify.

d. In Value data, change the data as follows to set the heap size to 8GB:

   -Xmx8000m
20 Start EPM System by selecting \textit{Start}, then \textit{All Programs}, then \textit{Oracle EPM System}, then \textit{Foundation Services}, and then \textit{Start EPM System}.

21 Validate that the heap size is set correctly:

\begin{enumerate}
\item Log in to the WebLogic Administration Console using WebLogic administrator credentials. (\url{http://WebLogic_Admin_Host:WebLogic_Admin_Port/console}).
\item In the Domain Structure, expand \textit{Environment}, and then select \textit{Servers}.
\item In \textit{Summary of Servers}, select \textit{Planning0}.
\item Click the \textit{Monitoring} tab, and then the \textit{Performance} tab.
\item In \textit{Java Virtual Machine Memory Utilization Statistics}, review the \textit{Heap Size Max} setting.
\end{enumerate}
Installing and Configuring Essbase Server on ESSHOST1

1. On the Essbase host machine (ESSHOST1), define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

2. From the mapped network drive, launch installTool.cmd.

3. In EPM System Installer 11.1.2.2, select a language, and then click OK.

4. In Welcome, click Next.
5 In Destination, specify the `MIDDLEWARE_HOME` directory location exactly as set while deploying Foundation Services on `FNDHOST1`, and then click Next.

6 In Installation Type, click Next.
7 In Product Selection, complete these steps, and then click Next.
   a. Clear the selection (uncheck) from Uncheck All.
   b. Select Essbase Server
      Required Foundation Services components are automatically selected.

8 In Confirmation, click Next to begin the installation of the selected components on ESSHOST1.
9 **In Summary**, click **Configure** after verifying that all components installed successfully.

10 **In Oracle Instance**, complete these steps, and then click **Next**.
   
   a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on **FNDHOST1**).
   
   b. In **EPM Oracle instance name**, enter **ESSBASE1**.
In the database configuration screen, enter the connection information for EPM System Repository and the user name and password of the database account to use for accessing the database (recorded in Table 5, “Database Checklist”), and then click Next.

The data that you enter must match the data that you entered while configuring the EPM System Repository on the Foundation Services server (FNDHOST1).

In the component configuration screen, click Next.
13 In Configure Essbase Server, click Next.

You can configure Essbase in active-passive mode, if required. This deployment assumes that this instance is the only Essbase instance on this machine.

14 In Confirmation, review the summary of the configuration tasks that will be executed, and then click Next.
15 When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Finish.

16 On ESSHOST1, start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Foundation Services, and then Start EPM System.

17 Validate Essbase Server configuration by starting the Sample application that is installed by default. The command execution is illustrated in the following screen shot.

```
a. On ESSHOST1, start a command prompt and change directory to
   EPM_ORACLE_INSTANCE/EssbaseServer/essbaseserver1/bin

   startMaxl -l admin password1

   Replace password1 with the password of the EPM System administrator account that
   you set while configuring components on the Foundation Services host machine
   (FNDHOST1).

c. Load the sample application using the following command:

   alter system load application sample;
```
MaxL displays a message similar to the following to indicate that the process was successful.

```
Application [Sample] started with process id [xxxx]
d. Unload Sample application using this command:
   alter system unload application sample;
e. Terminate MaxL using the exit command.
```

Installing and Configuring Financial Management Server on HFMHOST1

To install and configure Financial Management on **HFMHOST1**:

1. On the Financial Management host machine (**HFMHOST1**), define a network drive (for example, Z: \) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

2. From the mapped network drive, launch `installTool.cmd`.

3. In EPM System Installer 11.1.2.2, select a language, and then click **OK**.

4. In Welcome, click **Next**.

5. In Destination, specify the `MIDDLEWARE_HOME` directory location exactly as set while deploying Foundation Services on **FNDHOST1**, and then click **Next**.
6 In Installation Type, click Next.

7 In Product Selection, complete these steps, and then click Next.
   a. Remove the selection (uncheck) from Uncheck All.

      When you select Financial Management Service, required Foundation Services components are automatically selected.
8 In Confirmation, click Next to begin the installation of the selected components on HFMHOST1.

9 In Summary, click Configure after verifying that all components installed successfully.
10 In Oracle Instance, complete these steps, and then click Next.
   a. In Home directory for EPM Oracle instance, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on FNDHOST1).
   b. In EPM Oracle instance name, enter HFM_SERVER1.

11 On the database configuration screen, enter the connection information for EPM System Repository and the user name and password of the database account to use for accessing the database (recorded in Table 5, “Database Checklist”), and then click Next.

   The data that you enter must match the data that you entered while configuring the EPM System Repository on the Foundation Services server (FNDHOST1).
12 In component configuration screen, click **Next**.

13 In Configure Database, complete these steps, and then click **Next**.
   a. Select **Perform first-time configuration of database**.
   b. Enter connection information for the Financial Management database. An entry identifying this database must be present in `tnsnames.ora` on `HFMHOST1`. 
14 In Financial Management - Configure DCOM, complete these actions, and then click Next.
   a. In **Domain user**, enter the deployment account.
   b. In **Password** and **Re-type Password**, enter the deployment account password.

15 In Financial Management – Configure Application Server, click Next.
16 In Financial Management – Configure Cluster, click Next.

Clusters are used to target different Financial Management tasks to different servers. The task of creating clusters is not part of this deployment process.

17 In Confirmation, review the summary of the configuration tasks that will be executed, and then click Next.
When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Finish.

Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Foundation Services, and then Start EPM System.

Installing and Configuring Financial Management Web Application on HFMWEBHOST1

To install and configure Financial Management web application on HFMWEBHOST1:

1. Ensure that WebLogic Server Administration Server is running on the Foundation Services host machine (FNDHOST1).

2. On the Financial Management Web host machine (HFMWEBHOST1), define a network drive (for example, Z:) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

3. From the mapped network drive, launch installTool.cmd.

4. In EPM System Installer 11.1.2.2, select a language, and then click OK.

5. In Welcome, click Next.

6. In Destination, specify the MIDDLEWARE_HOME directory location exactly as specified while deploying Foundation Services on FNDHOST1, and then click Next.
7 In Installation Type, click **Next**.

8 In Product Selection, complete these steps, and then click **Next**.
   a. Clear the selection (uncheck) from **Uncheck All**.
   b. Select **Financial Management Web Applications** under **Financial Management**.
      When you select these components, required Foundation Services components are automatically selected.
9 In Confirmation, click Next to begin the installation of the selected components on HFMWEBHOST1.

10 In Summary, click Configure after verifying that all components installed successfully.

11 In Oracle Instance, complete these steps, and then click Next.

a. In Home directory for EPM Oracle instance, verify that the location of EPM Oracle Home directory is exactly as specified while configuring the Foundation Services (on FNDHOST1).

b. In EPM Oracle instance name, enter HFM_WEB1.
In the database configuration screen, enter the connection information for EPM System Repository and the user name and password of the database account to use for accessing the database (recorded in Table 5, "Database Checklist"), and then click Next. The data that you enter must match the data that you entered while configuring the EPM System Repository on the Foundation Services server (FNDHOST1).

In the component configuration screen, click Next.

12 In the database configuration screen, enter the connection information for EPM System Repository and the user name and password of the database account to use for accessing the database (recorded in Table 5, "Database Checklist"), and then click Next. The data that you enter must match the data that you entered while configuring the EPM System Repository on the Foundation Services server (FNDHOST1).

13 In the component configuration screen, click Next.
14 In Deploy to Application Server – Specify WebLogic Domain Information, click Next to deploy Financial Management and FDM web applications to the Oracle WebLogic Server domain that you created on the Foundation Services host (FNDHOST1).

15 In Deploy to Application Server: Oracle WebLogic, click Next.
16 In Financial Management – Configure DCOM, complete these actions, and then click Next.
   a. In Domain user, enter the deployment account.
   b. In Password and Re-type Password, enter the deployment account password.

17 In Financial Management – Configure Web Server, click Next.
18 In Financial Management – Configure Web Application, click Next.

19 In Financial Management – Enable Smart View Provider, click Next.

20 In Financial Management – Enable Life Cycle Management, click Next.
21 In Financial Management – Enable Web Services, click Next.

22 In Confirmation, review the summary of the configuration tasks that will be executed, and then click Next.
23 When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Finish.

24 Increase the JVM memory allocation by setting the default heap size of the managed server to 8GB:
   a. On HFMWEBHOST1, open Windows Registry Editor: Select Start and then Run, type regedit, and then click OK.
   b. In Registry Editor, select HKEY_LOCAL_MACHINE, then SOFTWARE, then Hyperion Solutions, then HFMWeb0, and then HyS9FinancialManagementWeb.
   c. Right-click JVMOptionX (where X is 1, 2, ...) whose value starts with -Xmx, and then select Modify.
   d. In Value data, change the data as follows to set the heap size to 8GB:
      -Xmx8000m
   e. Click OK.
   f. Close Registry Editor.

25 Start EPM System on HFMWEBHOST1 by selecting Start, then All Programs, then Oracle EPM System, then Foundation Services, and then Start EPM System.

26 Validate that the heap size is set correctly:
   b. In the Domain Structure, expand Environment, and then select Servers.
c. In **Summary of Servers**, select HFMWeb0.

d. Click the **Monitoring** tab, and then the **Performance** tab.

e. In **Java Virtual Machine Memory Utilization Statistics**, review the **Heap Size Max** setting.

---

### Installing and Configuring FDM on FDMHOST1

To install and configure FDM on FDMHOST1:

1. On the FDM host machine (**FDMHOST1**), define a network drive (for example, `Z:\`) that maps to the shared disk directory into which you extracted EPM System software (for example, `\sharedhost\sharedlocation\downloads\epm_unzipped`).

2. From the mapped network drive, launch `installTool.cmd`.

3. In EPM System Installer 11.1.2.2, select a language, and then click **OK**.
4 In Welcome, click Next.

5 In Destination, specify the MIDDLEWARE_HOME directory location exactly as specified while deploying Foundation Services on FNDHOST1, and then click Next.

6 In Installation Type, click Next.
In Product Selection, complete these steps, and then click Next.

a. Clear the selection (uncheck) from Uncheck All.

b. Select the following under FDM:
   - FDM Workbench Client
   - FDM Web Application
   - FDM Load Balancer
   - FDM Task Manager
   - FDM Server

When you select these components, required Foundation Services components are automatically selected.

In Confirmation, click Next.
9 **In Summary**, click **Configure** after verifying that all components installed successfully.

10 **In Oracle Instance**, complete these steps, and then click **Next**.

   a. **In Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on **FNDHOST1**).

   b. **In EPM Oracle instance name**, enter **FDM_SERVER1**.
On the database configuration screen, enter the connection information for EPM System Repository and the user name and password of the database account to use for accessing the database (recorded in Table 5, “Database Checklist”), and then click Next.

The data that you enter must match the data that you entered while configuring the EPM System Repository on the Foundation Services server (FNDHOST1).

On the component configuration screen, click Next.
13 In Confirmation, review the summary of the configuration tasks that will be executed, and then click Next.

14 When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Finish.
### Installing and Configuring EPM System: New Deployments

#### EPM System Configurator 11.1.2.2

<table>
<thead>
<tr>
<th>Product/Task</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hyperion Foundation</td>
<td>Completed</td>
</tr>
<tr>
<td>Pre-Configuration</td>
<td>Completed</td>
</tr>
<tr>
<td>Configure Oracle Configuration Manager</td>
<td>Completed</td>
</tr>
<tr>
<td>Configure Database</td>
<td>Completed</td>
</tr>
<tr>
<td>FDM</td>
<td>Completed</td>
</tr>
<tr>
<td>Pre-Configuration</td>
<td>Completed</td>
</tr>
<tr>
<td>Register with Saved Services</td>
<td>Completed</td>
</tr>
<tr>
<td>Configure FDM Server</td>
<td>Completed</td>
</tr>
</tbody>
</table>

**Status:**

Configuration completed.
To configure the web server:

1. On the Foundation Services host machine (for example, FNDHOST1) start Oracle Hyperion Enterprise Performance Management System Configurator for the instance by selecting Start, then All Programs, then Oracle EPM System, then Foundation Services, then FOUNDATION1 and then EPM System Configurator (Single Instance).

2. In configuration task selection screen, complete these steps, and then click Next.
   a. Clear the selection (uncheck) from Uncheck All.
   b. Expand Hyperion Foundation task group, and select (check) Configure Web Server.

3. In Configure Web Server, click Next.
4 In Confirmation, click Next.

5 In Summary, click Finish.

6 Restart the Oracle Process Manager service for the Oracle HTTP Server. The number after ohsInstance is different for you.
Performing Postconfiguration Tasks

Subtopics

- Refreshing EPM Workspace
- Validating the Deployment

Planning postconfiguration tasks include refreshing EPM Workspace and verifying the Planning deployment.

Refreshing EPM Workspace

To refresh EPM Workspace:

1. Start a browser session.
2. Access the following URL:

   http://FNDHOST1:9000/workspace/refresh

   In this URL, use port 9000, which is the managed server port where EPM Workspace is available, not the Oracle HTTP Server port.

   You should get a success message similar to the following screen shot.
Note: If you scaled out Foundation Services, refresh EPM Workspace on each Foundation Services host machine in your deployment.

Validating the Deployment

Subtopics

- Planning
- Financial Management

Planning

To validate Planning deployment:

1. Log on to EPM Workspace by accessing the following URL:
   http://epm.mycompany.com:19000/workspace/index.jsp

2. In EPM Workspace, select Navigate, then Administer, and then Planning Administration.
   Click OK if a warning about compatibility settings is displayed.

   The Classic Application Wizard is displayed. This wizard is used for creating Classic Planning applications.
Financial Management

To validate Financial Management deployment:

1. Log on to EPM Workspace by accessing the following URL using the EPM System Administrator credentials:
   
   http://epm.mycompany.com:19000/workspace/index.jsp

2. Select Navigate, then Administer, then Classic Application Administration, and then Consolidated Administration.

3. Click OK if compatibility setting warning is displayed.

   The Consolidation Administration application opens.
In This Chapter

Scaling Out Foundation Services ................................................................. 91
Scaling Out Planning ............................................................................... 101
Scaling Out Financial Management Server .............................................. 101
Scaling out Financial Management and FDM Web Applications .............. 102
Scaling Out FDM Server ...................................................................... 102
Scaling out Essbase Server ................................................................ 102
Configuring the Web Server ................................................................. 103
Generating Deployment Report .............................................................. 103

Scaling Out Foundation Services

Complete this procedure on each host machine; for example, FNDHOST2, onto which Foundation Services is to be scaled out.

To scale out Foundation Services:

1. On the Foundation Services scale out machine (FNDHOST2), define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

2. From the mapped network drive, launch installTool.cmd.

3. In EPM System Installer 11.1.2.2, select a language, and then click OK.

4. In Welcome, click Next.
5 In Destination, specify the $MIDDLEWARE_HOME$ directory location exactly as specified while deploying Foundation Services on $FNDHOST1$, and then click Next.

6 In Installation Type, click Next.
7 In Product Selection screen, complete these steps:

a. Clear the selection (uncheck) from **Uncheck All**.

b. Select the following components.
   - From **Foundation Services**
     - Foundation Components
     - Performance Management Architect Web Application
     - Performance Management Architect Data Synchronizer Service
     - Calculation Manager
   - From **Essbase**
     - Administration Services Web Application
     - Provider Services Web Application
     - Performance Management Architect Web Application
   - From **Reporting and Analysis**
     - Framework
     - Financial Reporting

c. Click **Next**.
8 In Confirmation, click Next.

9 In Summary, click Configure after verifying that all components installed successfully.
10 In Oracle Instance, complete these steps, and then click Next.

a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services on *FNDHOST1*.

b. In **EPM Oracle instance name**, enter *FOUNDATION2*.

11 On the database configuration screen, complete these steps:

a. Select **Connect to a previously configured Shared Services database**.

b. Enter database connection information for EPM System Repository and the user name and password of the database account to use for accessing the database (recorded in...
Table 5, “Database Checklist”). This information must be identical to the information you entered while deploying Foundation Services on FNDHOST1.

c. Click **Next**.

EPM System Repository stores the configuration information for all the servers in the deployment so that components can find one another.

12 On the component configuration screen, complete these steps:
   a. Remove the selection (uncheck) from **Uncheck All**.
   b. Select these components:
      - From **Hyperion Foundation**
        - Scale out compact server on this machine
        - Configure Web Server
      - From **Reporting and Analysis**
        - Configure Framework Services
   c. Click **Next**.
13 In Configure Reporting and Analysis Framework Services, click Next.

14 In Configure Web Server, complete these steps, and then click Next.
   a. In Web Server Type, select Oracle HTTP Server.
   b. Optional: In Web Server Port, change the web server port number.
   c. Click Next.
In Confirmation, review the summary of the configuration tasks that will be executed, and then click Next.

When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Finish.
17 Increase the JVM memory allocation by setting the default heap size of the managed server to 8GB:

a. On FNDHOST2, open Windows Registry Editor: Select **Start** and then **Run**, type **regedit**, and then click **OK**.

b. In Registry Editor, select **HKEY_LOCAL_MACHINE**, then **SOFTWARE**, then **Hyperion Solutions**, then **EPMServer1**, and then **HyS9EPMServer**.

c. Right-click **JVMOptionX** (where X is 1, 2, ...) whose value starts with **-Xmx**, and then select **Modify**.

d. In **Value data**, change the data as follows to set the heap size to 8GB:

```
-Xmx8000m
```
e. Click OK.

f. Close Registry Editor.

18 Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Foundation Services, and then Start EPM System.

19 Validate that the heap size is set correctly:

a. Log in to the WebLogic Administration Console using WebLogic administrator
   credentials. (http://WebLogic_Admin_Host:WebLogic_Admin_Port/console).

b. In the Domain Structure, expand Environment, and then select Servers.

c. In Summary of Servers, select EPMServer1.

d. Click the Monitoring tab, and then the Performance tab.

e. In Java Virtual Machine Memory Utilization Statistics, review the Heap Size Max setting.
Reconfigure the load balancer so that it routes requests addressed to epm.mycompany.com and epminternal.mycompany.com to the Oracle HTTP Server on this Foundation Services host also.

Scaling Out Planning

Complete this procedure on each host machine; for example, PLANHOST2, onto which Planning is to be scaled out.

To scale out Planning:

1. Verify that you are logged on to the Planning scale out machine (PLANHOST2) using the deployment account.

2. Complete step 1 on page 45 through step 21 on page 53 to set up an instance of Planning on the scale out machine (PLANHOST2). Use PLANNING2 as the instance name on this machine. Validate heap size changes for the managed server named Planning1.

Scaling Out Financial Management Server

Complete this procedure on each host machine; for example, HFMHOST2, onto which Financial Management Server is to be scaled out.
To scale out the Financial Management Server:

1. Verify that you are logged on to the Financial Management scale-out machine (HFMHOST2) using the deployment account.
2. Complete step 1 on page 61 through step 18 on page 68 to set up an instance of Financial Management server on the scale out machine (HFMHOST2). Use HFM_SERVER2 as the instance name on this host machine.

Scaling out Financial Management and FDM Web Applications

Complete this procedure on each host machine; for example, HFMWEBHOST2, onto which Financial Management and FDM Web applications are to be scaled out.

To scale out Financial Management Web:

1. Verify that you are logged on to the Financial Management Web scale out machine (HFMWEBHOST2) using the deployment account.
2. Complete step 1 on page 69 through step 26 on page 77 to set up Financial Management and FDM Web applications on the scale out machine (HFMWEBHOST2). Use HFM_WEB2 as the instance name on this machine. Validate heap size changes for the managed server named HFMWeb1.

Scaling Out FDM Server

Complete this procedure on each host machine; for example, FDMHOST2, onto which FDM Server is to be scaled out.

To scale out FDM Server:

1. Verify that you are logged on to the FDM Server scale out machine (FDMHOST2) using the deployment account.
2. Complete step 1 on page 78 through step 14 on page 83 to set up an Oracle Hyperion Financial Data Quality Management Server instance on the scale-out machine (FDMHOST2). Use FDM_SERVER2 as the instance name on this machine.

Scaling out Essbase Server

Complete this procedure on each host machine; for example, ESSHOST2, onto which Essbase is to be scaled out.

Because scaled-out Essbase Servers are independent, an application deployed to one server does not span across to other Essbase Servers. While creating applications, for example, using Oracle Hyperion Planning, you choose the Essbase Server that you want to use.
To scale out Essbase Server:

1. Verify that you are logged on to the Essbase Server scale out machine (**ESSHOST2**) using the deployment account.

2. Complete step 1 on page 54 through step 17 on page 60 to set up an Oracle Essbase Server instance on the scale out machine (**ESSHOST2**). Use **ESSBASE2** as the instance name on this machine.

Configuring the Web Server


Generating Deployment Report

Generate a deployment report as a reference of your current deployment. This report allows you to compare this deployment with future deployments.

To generate a deployment report:

1. Open a command prompt window on the Oracle Hyperion Foundation Services host machine (**FNDHOST1**).

2. Navigate to **EPM_ORACLE_INSTANCE/bin**; for example, `C:\Oracle\Middleware\user_projects\FOUNDATION1\bin`.

3. Execute the following command:

   ```shell
   epmsys_registry report deployment
   ```

   The report is displayed in a browser. The report file (**deployment_report.html**) is stored in **EPM_ORACLE_INSTANCE/diagnostics/reports**; for example, `C:\Oracle\Middleware\user_projects\FOUNDATION1\diagnostics\reports\deployment_report.html`.

Configuring the Web Server  103
Installing Smart View

Smart View must be installed on a machine that already has Microsoft Office and .NET Framework 3.5 installed.

To install Smart View:

1. From the client machine, access EPM Workspace using the following URL:
   http://epm.mycompany.com:19000/workspace/index.jsp

2. In EPM Workspace, select Tools, then Install, and then Smart View to launch Smart View installer.

3. Follow onscreen prompts to install Smart View.

After you complete the installation, Oracle Hyperion Smart View for Office is available as a menu item in Microsoft Office products like Microsoft Excel.
Installing Financial Reporting Studio

Because Financial Reporting Studio requires access to the host servers in the application tier, it should be installed on a machine that has network access to these servers. In the reference topology (illustrated in “Standard Deployment Topology” on page 11), Financial Reporting Studio is installed on the client workstation (CLIENTHOST1) within the DMZ.

➢ To install Financial Reporting Studio:

1. From a client machine that has network access to the host servers in the application tier, access EPM Workspace using the following URL:
   http://epm.mycompany.com:19000/workspace/index.jsp
2. In Oracle Hyperion Enterprise Performance Management Workspace, select Tools, then Install, and then Financial Reporting Studio to launch the installer.
4. To launch Oracle Hyperion Financial Reporting Studio, select Start, then All Programs, then Oracle, then Financial Reporting Studio, and then Financial Reporting Studio.

Installing Administration Services Console

Because Oracle Essbase Administration Services Console requires access to the host servers in the application tier, it should be installed on a machine that has network access to these servers. In the reference topology (illustrated in “Standard Deployment Topology” on page 11), Administration Services Console is installed on the client workstation (CLIENTHOST1) within the DMZ.

➢ To install Administration Services Console:

1. On a client machine that has network access to the host servers in the application tier, define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).
2. On the mapped network drive, navigate to EssbaseAdministrationServicesConsole directory; for example, to Z:\EssbaseAdministrationServicesConsole.
3. Double-click EASConsole.exe.
4. Follow onscreen prompts to install Administration Services Console.
5. On Summary, click Finish.
6. Start Oracle Essbase Administration Services Console by selecting Start, then All Programs, then Oracle EPM System, then Essbase, then Essbase Administration Services, and then Start Administration Services Console.
Installing Financial Management Client

To create a Financial Management application, you must first create a profile (.per) file that represents the application. Use the instructions in this section to install Financial Management Client, which includes the program that creates the profile file.

➢ To install Financial Management Client:

1. On a client machine that has network access to the host servers in the application tier, define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).
2. On the mapped network drive, navigate to FinancialManagementClient directory.
3. Double-click HFMClient64.
5. On Summary, click Finish.