

Oracle® Enterprise Performance Management System

Installation and Configuration Guide

Release 11.1.2.1

Updated: January 2012

EPM System Installation and Configuration Guide, 11.1.2.1

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1

About EPM System Product Installations

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About EPM System Products

Check the [Oracle Documentation Library \(http://www.oracle.com/technology/documentation/epm.html\)](http://www.oracle.com/technology/documentation/epm.html) on Oracle® Technology Network to see whether an updated version of this guide is available.

Oracle Enterprise Performance Management System products form a comprehensive Enterprise Performance Management system that integrates modular suites of financial management applications with the most comprehensive business intelligence capabilities for reporting and analysis. Major components of EPM System products:

- Oracle Hyperion Foundation Services
 - Foundation Services (includes Oracle Hyperion Shared Services and Oracle Hyperion Enterprise Performance Management Workspace)
 - Oracle HTTP Server
 - Oracle WebLogic Server
 - Oracle Hyperion EPM Architect
 - Oracle Hyperion Calculation Manager
 - Oracle Hyperion Smart View for Office
- Oracle Essbase
 - Oracle Essbase
 - Oracle Essbase Administration Services
 - Oracle Essbase Integration Services

- Oracle Essbase Provider Services
- Oracle Essbase Studio
- Oracle Essbase Spreadsheet Add-in
- Oracle Hyperion Reporting and Analysis
 - Oracle Hyperion Reporting and Analysis Framework
 - Oracle Hyperion Interactive Reporting
 - Oracle Hyperion Financial Reporting
 - Oracle Hyperion SQR Production Reporting
 - Oracle Hyperion Web Analysis
- Oracle's Hyperion Financial Performance Management Applications
 - Oracle Hyperion Planning (including Oracle Hyperion Capital Asset Planning, Oracle Hyperion Workforce Planning, Oracle Hyperion Public Sector Planning and Budgeting, and Oracle Hyperion Business Rules)
 - Oracle Hyperion Financial Management
 - Oracle Hyperion Performance Scorecard
 - Oracle Hyperion Strategic Finance
 - Oracle Hyperion Profitability and Cost Management
 - Oracle Hyperion Disclosure Management
 - Oracle Hyperion Financial Close Management
- Oracle's Data Management
 - Oracle Hyperion Financial Data Quality Management
 - Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications
 - Oracle Hyperion Data Relationship Management

For information about the products and components in each of these product families, see *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.

Assumed Knowledge

This guide is for administrators who install, configure, and manage EPM System products. It assumes the following knowledge:

- Security and server administration skills
- Windows administration skills and or UNIX/Linux administration skills
- Web application server administration skills.

- A strong understanding of your organization's security infrastructure, including authentication providers such as Oracle Internet Directory, LDAP, or Microsoft Active Directory, and use of SSL
- A strong understanding of your organization's database and server environments
- A strong understanding of your organization's network environment and port usage

About Middleware Home, EPM Oracle Home, and EPM Oracle Instance

Middleware Home

A Middleware home consists of the Oracle WebLogic Server home, and, optionally, one or more Oracle homes, including EPM Oracle home. A Middleware home can reside on a local file system or on a remote shared disk that is accessible through Network File System (NFS).

The Middleware home location is defined during the first product installation on the computer. Subsequent installations on the computer use the previously defined location. The default installation directory is `Oracle/Middleware`. The Middleware home location is referred to as *MIDDLEWARE_HOME* throughout this document.

EPM Oracle Home

An Oracle home contains installed files necessary to host a specific product, and resides within the directory structure of the Middleware home. The EPM Oracle home contains files for EPM System products.

Components of EPM System products are installed in the EPM Oracle home directory under the Middleware home. The default EPM Oracle home location is *MIDDLEWARE_HOME/EPMSys11R1*. In addition, common internal components used by the products are installed in EPM Oracle home. Choose the location carefully to ensure that the location has enough disk space for all products that you are installing on the machine. You cannot change the location.

The EPM Oracle home location is defined in the system environment variable called *EPM_ORACLE_HOME*. The EPM Oracle home location is referred to as *EPM_ORACLE_HOME* throughout this document.

In a distributed environment, the EPM Oracle home directory structure must be the same on each machine.

EPM Oracle Instance

Additionally, during configuration, some products deploy components to the EPM Oracle instance defined during configuration. The default location for the EPM Oracle instance is *MIDDLEWARE_HOME/user_projects/epmsystem1*. The EPM Oracle instance location is referred to as *EPM_ORACLE_INSTANCE* throughout this document. Deployed components include:

- Data and applications

- Deployed Web applications
- Log files

Web applications are deployed to *MIDDLEWARE_HOME/user_projects/domains/domainName*.

Typically, if you are installing all products on a single machine, for the first product you configure, you create a new EPM Oracle instance. For each product after that, you modify the existing instance. If you are installing in a distributed environment, create a new instance with a unique name on each machine.

In a UNIX environment, you can deploy to a shared drive by installing to a shared drive and then configuring each machine to deploy to a different instance. See [“Deploying to a Shared Drive Environment \(UNIX\)” on page 20](#).

If you want to configure multiple instances of Essbase on a machine, see [“Configuring and Starting Additional Instances of Essbase Server” on page 156](#).

Installation Checklist

Oracle Hyperion Enterprise Performance Management System Installer installs components on three tiers:

- Client tier
- Services tier
- Web tier, which includes the Java Application Server tier and the Web server tier

Additionally, when you configure EPM System products, you set up databases on the Data tier.

For more information about EPM System product architecture, see *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.

EPM System installation follows this workflow. Each part of the workflow is described in the guides as noted in the table below:

Note: If you are installing Financial Close Management, follow the installation and configuration sequence described in [“Financial Close Management Installation and Configuration Prerequisites and Roadmap” on page 86](#).

Note: Upgrade Note!

If you are upgrading from an earlier release of EPM System products, use EPM System Installer and Oracle Hyperion Enterprise Performance Management System Configurator to install products in a new environment, following the process in [Chapter 5, “Upgrading EPM System Products.”](#) Upgrading does not apply to moving from Release 11.1.2 to Release 11.1.2.1.

If you are moving from Release 11.1.2 to Release 11.1.2.1, Use the “Apply Maintenance Release” option in EPM System Installer instead, and see [“Maintenance Release Installation Checklist”](#) on page 21.

Task	Reference
1. Plan the installation and perform prerequisite tasks.	“Installation Planning Checklist” in <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i>
2. Meet the system requirements.	<i>Oracle Hyperion Enterprise Performance Management System Certification Matrix</i> (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html)
3. Prepare the installation files.	Chapter 2, “Preparing for Installation”
4. Install EPM System products.	Chapter 3, “Installing EPM System Products” Ensure that you meet any installation prerequisites that apply to your environment. “Installation Prerequisites” on page 83. In particular, make sure that you review the prerequisites for Oracle HTTP Server, which is installed with Foundation Services. Tip: Before you begin, determine the type of installation you plan to perform: ● New installation ● Maintenance release installation ● Re-installation For details on each installation type, see “Installation Type” on page 101. Upgrade Note! If you are upgrading from an earlier release, you must choose “New Installation” and install in a new installation location. See Chapter 5, “Upgrading EPM System Products.”

Task	Reference
5. Configure EPM System products using EPM System Configurator.	Chapter 4, “Configuring EPM System Products” Ensure that you meet any configuration prerequisites that apply to your environment. See “Configuration Prerequisites ” on page 117. Note: In a distributed environment, configure Foundation Services first. Foundation Services must be installed and configured in order for other products to configure successfully. To configure Foundation Services, select the Foundation tasks on the Task Selection panel of EPM System Configurator: “Configure Common Settings,” “Configure Database,” “Configure Oracle Configuration Manager,” and “Deploy to Application Server.” Configure other EPM System products, and then configure the Web server last: select “Configure Web Server” from the Foundation tasks. For more information about required configuration sequence, see “Configuration Sequence” on page 121. Note: If you are enabling SSL in your deployment, see the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> before you configure. Different SSL configurations have implications for the choices you make during configuration using EPM System Configurator. Also, there are additional post-configuration tasks when deploying an SSL configuration.
6. Optionally, manually deploy EPM System Web applications.	Chapter 6, “Manually Deploying EPM System Web Applications”
7. Perform any required postconfiguration tasks for your products.	Chapter 7, “Performing Postconfiguration Tasks”
8. Start EPM System services.	Chapter 8, “Starting and Stopping EPM System Products”
9. Validate the installation using Oracle Hyperion Enterprise Performance Management System Diagnostics and verify deployment.	Chapter 9, “Validating the Installation and Verifying Deployment”
10. Enable external authentication and provision users.	<i>Oracle Hyperion Enterprise Performance Management System User and Role Security Guide</i>

Tip: During installation, configuration, and validation, keep a list of all user names and passwords that you use to create or modify the system, including the applications with which they are associated and their purpose.

Deploying to a Shared Drive Environment (UNIX)

For UNIX environments, you can deploy to a shared drive (not supported for Windows). When you deploy to a shared drive, you can:

- Install once, and configure on each machine
- Review the configuration for a distributed setup from a single machine
- Review logs for different machines from a single machine

- Enable patching in a single place
- Simplify disaster recovery setup

The following procedure describes an overview of the process of deploying EPM System products to a shared drive. Use this procedure along with the installation checklist. See the [“Installation Checklist” on page 18](#) for details.

EPM System supports the following types of shared drives:

- Any SAN storage device with a shared disk file system supported on the installation platform
- Any NAS device over a supported network protocol

➤ Deploying to a shared drive environment:

- 1 Map all the machines in the deployment to the same network share.
- 2 Run EPM System Installer on one machine to install all EPM System components on the shared drive.

During installation, on the **Destination/Middleware Home** page, specify a directory on the shared drive.

- 3 Run EPM System Configurator on each machine in the environment.
 - For each machine, on the **Configure a New or Existing EPM Oracle Instance** configuration page, for **Home directory for EPM Oracle instances** specify the same instance home, and for **EPM Oracle Instance name** specify a new instance name. For example, after configuration, the directory structure for *EPM_ORACLE_INSTANCE* looks like:


```

/user_projects
/node1
/node2
/nodeN
domains/epmsystem
          
```
 - For each machine, configure only the components to be run on the machine.
 - Configure Foundation Services first, on the machine that is to be the WebLogic Administration Server.
 - The **Set Up Shared Services and Registry Database Connection** configuration page displays only on the first machine.
- 4 Complete the configuration on each machine and close EPM System Configurator before moving on to configure another machine.

Maintenance Release Installation Checklist

Note: If you are applying the maintenance release to Financial Close Management, follow the installation and configuration sequence described in [“Financial Close Management Maintenance Release Installation Prerequisites” on page 91](#).

Table 1 Maintenance release installation checklist

Task	Reference
Plan the installation and perform prerequisite tasks.	"Installation Planning Checklist" in <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i>
Meet the system requirements.	<i>Oracle Hyperion Enterprise Performance Management System Certification Matrix</i> (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html)
Prepare the installation files.	Chapter 2, "Preparing for Installation"
Install EPM System products.	Chapter 3, "Installing EPM System Products" Installation notes: ● Review prerequisites. See "Maintenance Release Installation Prerequisites" on page 90. ● During installation, select Apply Maintenance Release. ● EPM System Installer applies the release to all installed 11.1.2.0 products. You cannot apply the maintenance release to only some products in your deployment. On the Product Selection page, you cannot make any selections or deselections. ● Note that for clients that have a new client installer in Release 11.1.2.1 (Financial Reporting Studio Client, Planning Offline Client and Strategic Finance Client), applying the maintenance release installation option does not update the client software. You must install the client using the client installer. See "Installing EPM System Clients" on page 109.
Configure EPM System products using EPM System Configurator.	Chapter 4, "Configuring EPM System Products" Ensure that you meet any configuration prerequisites that apply to your environment. See " Configuration Prerequisites " on page 117. All required configuration tasks are preselected for you. By default, EPM System Configurator uses the same database for all products that you configure at one time. To use a different database for each product, perform the "Configure Database" task separately for each product. In some cases you might want to configure separate databases for products. For the Configure a New or Existing EPM Oracle Instance configuration task, select Modify an existing EPM Oracle instance . Note: In a distributed environment, configure Foundation Services first. Foundation Services must be installed and configured for other products to configure successfully. Configure other EPM System products, and then configure the Web server last: select "Configure Web Server" from the Foundation tasks. For more information about required configuration sequence, see " Configuration Sequence " on page 121. Note: If you are deploying in an SSL-enabled environment, see the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> before you configure. The type of SSL deployment you choose affects the choices you make during configuration with EPM System Configurator. Also, there are additional post-configuration tasks in an SSL environment.
Optionally, manually deploy EPM System Web applications.	Chapter 6, "Manually Deploying EPM System Web Applications"
Perform any required postconfiguration tasks for your products.	Chapter 7, "Performing Postconfiguration Tasks"

Task	Reference
Start EPM System services.	Chapter 8, “Starting and Stopping EPM System Products”
Validate the installation using EPM System Diagnostics and verify deployment.	Chapter 9, “Validating the Installation and Verifying Deployment”

About Clustering Essbase with Oracle Process Manager and Notification (OPMN) Server

Oracle Process Manager and Notification server (OPMN) enables you to monitor and control the Essbase Agent process. You add Essbase Agent information to `opmn.xml` to enable OPMN to start, stop, and restart the agent using the OPMN command line interface. OPMN can automatically restart the Essbase Agent when it becomes unresponsive, terminates unexpectedly, or becomes unreachable as determined by ping and notification operations. Additionally, you can use the failover functionality available in OPMN to provide high availability of Essbase clusters.

The following table describes an overview of the process of installing, configuring, and managing Essbase with OPMN.

Table 2 Installing, configuring, and managing Essbase with OPMN

Task	Reference
Install EPM System products, including Essbase. Install Essbase locally on each node. During installation, EPM System Installer also installs OPMN on the Essbase Server machine. Note: Oracle recommends that the Oracle Hyperion Shared Services Registry database be on a different machine than Essbase.	Chapter 3, “Installing EPM System Products”
Configure EPM System products, including Essbase. By default EPM System Configurator sets up Essbase to be managed by OPMN. If you are implementing Essbase clustering (active-passive only), during configuration with EPM System Configurator, do the following: - On the first machine, use EPM System Configurator to set up the cluster: - On the Configure Essbase Server panel, for “Full path to application location (ARBORPATH),” the location you specify must be a shared drive. The location must reside on a file system that is reachable by all Essbase servers in the cluster. - Click “Cluster Setup” to set up the cluster. - On the second machine, use EPM System Configurator to make this Essbase Server join the cluster you created on the first machine: - On the Configure Essbase Server page, for “Full path to application location (ARBORPATH),” the location must match the location you specified on the first machine in the cluster. - Click “Cluster Setup” to make this Essbase Server join the cluster you created on the first machine. During cluster setup on the second machine, EPM System Configurator updates <code>essbase.cfg</code> to specify <code>failovermode=true</code>.	Chapter 4, “Configuring EPM System Products” “Configure Essbase Server” on page 152

Task	Reference
If you set up an active-passive Essbase cluster using EPM System Configurator, you must perform additional steps to set up Essbase failover on both nodes of the cluster.	“Setting Up Active-Passive Essbase Clusters” on page 252
If you configured more than one instance of Essbase Server on a single machine, each instance has its own OPMN, its own start scripts, and its own log files. You must update each instance's copy of <code>opmn.xml</code> so that each OPMN has unique ports for communication.	“Modifying OPMN for an Additional Instance of Essbase” on page 254
Start Essbase using OPMN. Note: EPM System Configurator also sets up start scripts to start Essbase without using OPMN. Note that if you use this method of starting Essbase, OPMN is not used for managing Essbase and active-passive failover clusters are not supported.	“Essbase Server” on page 293
Optionally, learn more about OPMN service failover and the required elements and attributes in <code>opmn.xml</code> for configuring Essbase for failover.	Appendix J, “OPMN Service Failover for Essbase Server”
Diagnose problems by reviewing the OPMN logs.	The “Essbase” chapter of <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide</i>
Manage Essbase using OPMN, which enables you to monitor and control the Essbase Agent process.	<i>Oracle Essbase Database Administrator's Guide</i> , “Managing Essbase Using OPMN.”

Installation Documentation Roadmap

You can find EPM System installation documentation in the [Oracle Documentation Library](http://www.oracle.com/technology/documentation/epm.html) (<http://www.oracle.com/technology/documentation/epm.html>) on Oracle® Technology Network. For faster access to the documentation for a specific release, you can use the Enterprise Performance Management Documentation Portal (<http://www.oracle.com/us/solutions/ent-performance-bi/technical-information-147174.html>), which also contains links to EPM Supported Platform Matrices, My Oracle Support, and other information resources.

Always check the [Oracle Documentation Library](http://www.oracle.com/technology/documentation/epm.html) (<http://www.oracle.com/technology/documentation/epm.html>) on Oracle® Technology Network to see whether updated versions of these guides are available.

For system requirements and release compatibility, you can find the *Oracle Hyperion Enterprise Performance Management System Certification Matrix* at http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html.

Table 1 lists the documents to consult for instructions on performing essential installation tasks.

Table 3 Documentation That You Need

Task	Related Documentation
Meeting system requirements and understanding release compatibility	<i>Oracle Hyperion Enterprise Performance Management System Certification Matrix</i> (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html)
Planning the installation	<i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i>
- Installing, configuring, and deploying EPM System products - Starting EPM System products - Validating the installation - Upgrading EPM System products	<i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</i>
Securing EPM System	<i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i>
Provisioning users	<i>Oracle Hyperion Enterprise Performance Management System User and Role Security Guide</i>

Table 2 lists the documents to consult for additional installation tasks that you might need to perform.

Table 4 Documentation That You Might Need

Task	Related Documentation
Troubleshooting installations	<i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide</i>
Creating a backup of product and application data	<i>Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide</i>
Migrating from one environment to another	<i>Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide</i>
Clustering EPM System applications for high availability and disaster recovery	<i>Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide</i>

Additional content is available in the White Papers Library at [Oracle Enterprise Performance Management / Business Intelligence White papers](http://www.oracle.com/technetwork/middleware/bi-foundation/resource-library-090986.html). (<http://www.oracle.com/technetwork/middleware/bi-foundation/resource-library-090986.html>).

2

Preparing for Installation

In This Chapter

Downloading the Installation Files	27
EPM System Software Dependencies	29
Component Installation By Tier and Installation Assemblies	33

Downloading the Installation Files

➤ To download the installation files:

1 Create a directory to store the EPM System files.

You can download files to a shared drive, or to each machine in your deployment. If you are installing from a network drive, map this drive. This directory is referred to as */download_location* in this procedure.

Tip: Oracle recommends that you download files to a shared drive.

2 Download the following files from the “Oracle Enterprise Performance Management System” page of the [Oracle Software Delivery Cloud \(http://edelivery.oracle.com/\)](http://edelivery.oracle.com/) site into */download_location*. Note that some files are posted by platform; ensure that you download files for the platform you are using.

- EPM System Installer (Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition Release 11.1.2.1 for *platformName*)
- ZIP files for the products you purchased. ZIP files include installation *assemblies* (product plug-in installation files for EPM System Installer).

Review the Media Pack Readme on the [Oracle Software Delivery Cloud](http://edelivery.oracle.com/) to see which ZIP files to download depending on the products you purchased. (To see the Media Pack Readme, once you have selected the media pack, click **Readme**.)

3 Unzip the EPM System Installer into */download_location*.

If you are prompted that any files already exist, click **Yes** to overwrite the files.

Tip: Use a zip file extraction program that can handle long path names, such as 7-Zip.

Unzip to a directory with no spaces in the name.

4 Unzip the installation assemblies into the same directory (*/download_location*).

If you are prompted that any files or common components already exist, click **Yes** to overwrite the files.

The assemblies are automatically unzipped into an */assemblies* directory. For information about which assemblies to use for product components, see [“Component Installation By Tier and Installation Assemblies”](#) on page 33.

If you downloaded files to a central location, ensure that you unzip the following common files. If you downloaded files to multiple machines in your deployment, on each machine in the deployment, unzip the following common files. Unzip files for each operating system in a separate folder.

- Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition Release 11.1.2.1.0 for *PlatformName*
- Oracle Hyperion Foundation Services Release 11.1.2.1.0 for *PlatformName* Part 1 of 7
- Oracle Hyperion Foundation Services Release 11.1.2.1.0 for *PlatformName* Part 2 of 7
- Oracle Hyperion Foundation Services Release 11.1.2.1.0 for *PlatformName* Part 3 of 7
- Oracle Hyperion Foundation Services Release 11.1.2.1.0 for *PlatformName* Part 4 of 7
- Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7
- Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 6 of 7
- Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7

Note the following information about preparing files for a distributed environment:

- Even though you need the EPM-FoundationServices ZIP files on each machine in the environment, install Foundation Services Web applications on only one machine (unless multiple instances are required for clustering).
- On the machine on which you plan to administer the WebLogic Server, you must install all Web applications for all applications you plan to deploy on any machine in the environment. For more information, see [“Installing EPM System Products in a Distributed Environment”](#) on page 94.

5 The */assemblies* directory should include a subdirectory for each product that you want to install on this machine. Ensure that the */assemblies* directory looks as follows:

```
assemblies/  
    product/
```

version/
assembly.dat

Note: ProductRef.inf might be in the /assemblies directory. It can remain without causing problems.

EPM System Installer can install a product only if the installation assembly files for the product are downloaded and unzipped to the correct location.

EPM System Software Dependencies

This section describes the required EPM System software for EPM System components. Use it to understand what selections to make in EPM System Installer based on what product you purchased.

In some cases, EPM System Installer preselects products for you when there is a dependency. For example, when you are installing Planning, Essbase Server is preselected. When you are installing Web Analysis, Reporting and Analysis Framework Services and Common Libraries is preselected. You can clear these dependant options if you plan to install them on another machine.

Table 5 Essbase Software Dependencies

Client Tier	Web Tier	Services Tier
Essbase		
Required: ● Essbase Client ● Spreadsheet Add-in (installed separately) ● Essbase Administration Services Console ● Smart View Optional: ● Essbase Studio Console ● Essbase Integration Services Console ● Performance Management Architect Batch Client ● Performance Management Architect File Generator	Required: ● Foundation Services Web Applications (Shared Services and EPM Workspace) ● Essbase Administration Services Web Application ● Provider Services Web Application Optional: ● Performance Management Architect Web Application ● Performance Management Architect Data Synchronizer Service	Required: ● Essbase Server Optional: ● Essbase Integration Services ● Essbase Studio Server ● Performance Management Architect Dimension Server Service

Table 6 Reporting and Analysis Software Dependencies

Client Tier	Web Tier	Services Tier
Reporting and Analysis		
Required: - Financial Reporting Studio (installed separately, with Financial Reporting Print Server) - Interactive Reporting Studio - Interactive Reporting Dashboard Development Services - SQR Production Reporting Studio Optional: - Smart View	Required: - Foundation Services Web Applications (Shared Services and EPM Workspace) - Financial Reporting Web Application - Web Analysis Web Application - Reporting and Analysis Framework Web Application - Financial Management ADM Driver	Required: - Reporting and Analysis Framework Services and Common Libraries - Production Reporting - Interactive Reporting Services

Table 7 Financial Performance Management Applications Software Dependencies

Client Tier	Web Tier	Services Tier
Planning		
Required: - Financial Reporting Studio (installed separately) - Essbase Administration Services Console - Smart View - Planning Offline Client Optional: - Performance Management Architect Batch Client - Performance Management Architect File Generator Note: You do not need to install Performance Management Architect components if you are using Classic application administration.	Required: - Foundation Services Web Applications (Shared Services and EPM Workspace) - Planning Web application - Essbase Administration Services Web application - Financial Reporting Web Application - Reporting and Analysis Framework Web application - Calculation Manager Web Application Optional: - Provider Services Web Application - Web Analysis Web application - Performance Management Architect Web Application - Performance Management Architect Data Synchronizer Service Note: You do not need to install Performance Management Architect components if you are using Classic application administration.	Required: - Reporting and Analysis Framework Services and Common Libraries - Planning RMI Services (installed automatically) - Essbase Server Optional: - Financial Reporting Print Server - Performance Management Architect Dimension Server Service Note: You do not need to install Performance Management Architect components if you are using Classic application administration.

Client Tier	Web Tier	Services Tier
Financial Management		
Required: - Financial Management Client - Financial Reporting Studio (installed separately) - Smart View - Financial Management ADM Driver Optional: - Financial Management Sample Applications and Starter Kits - Performance Management Architect Batch Client - Performance Management Architect File Generator Note: You do not need to install Performance Management Architect components if you are using Classic application administration.	Required: - Foundation Services Web Applications (Shared Services and EPM Workspace) - Financial Reporting Web Application - Reporting and Analysis Framework Web application - Financial Management IIS Web Applications Optional: - Web Analysis Web application - Calculation Manager Web Application - Performance Management Architect Web Application - Performance Management Architect Data Synchronizer Service - Financial Management Web Service (required only for Financial Close Management) - Financial Management Service (required only for Financial Close Management) Note: You do not need to install Performance Management Architect components if you are using Classic application administration.	Required: - Reporting and Analysis Framework Services and Common Libraries - Financial Management Service Optional: - Performance Management Architect Dimension Server Service Note: You do not need to install Performance Management Architect components if you are using Classic application administration.
Profitability and Cost Management		
Optional: - Financial Reporting Studio (installed separately) - Essbase Administration Services Console - Smart View - Performance Management Architect Batch Client - Performance Management Architect File Generator	Required: - Foundation Services Web Applications (Shared Services and EPM Workspace) - Profitability and Cost Management Web Application - Essbase Administration Services Web Application - Essbase Provider Services Web Application - Performance Management Architect Web Application - Performance Management Architect Data Synchronizer Service Optional: - Financial Reporting Web Application - Web Analysis Web Application - Reporting and Analysis Framework Web Application	Required: - Essbase Server - Performance Management Architect Dimension Server Service Optional: - Financial Reporting Print Server Service - Reporting and Analysis Framework Services and Common Libraries

Client Tier	Web Tier	Services Tier
Financial Close Management		
Smart View	Required: - Foundation Services Web Applications (Shared Services and EPM Workspace) - Financial Close Management Web Application	
Disclosure Management		
Required: - Smart View - Disclosure Management Client and Taxonomy Designer (installed separately)	Required: - Foundation Services Web Applications (Shared Services and EPM Workspace) - Reporting and Analysis Framework Web Application - Disclosure Management Web Application	Required: Reporting and Analysis Framework Services and Common Libraries
Performance Scorecard		
Optional: - Interactive Reporting Studio Console - Interactive Reporting Dashboard Development Services - Essbase Administration Services Console - Performance Scorecard ETL Web Application	Required: - Foundation Services Web Applications (Shared Services and EPM Workspace) - Reporting and Analysis Framework Web Application - Performance Scorecard Web Reports Web Application - Performance Scorecard Alerter Web Application	Optional: - Essbase Services Server (Required if you are using Essbase as a data source) - Framework Services and Common Libraries - Interactive Reporting Services
Strategic Finance		
Required: - Strategic Finance Client (installed separately) Optional: - Financial Management Client - Strategic Finance Integration with Financial Management Services (Client) - FDM Workbench Client	Required: - Foundation Services Web Applications (Shared Services and EPM Workspace) - Strategic Finance Web Services	Required: Strategic Finance Service

Table 8 Data Management Software Dependencies

Client Tier	Web Tier	Services Tier
FDM		

Client Tier	Web Tier	Services Tier
Required: ● FDM Workbench Client	Required: ● Foundation Services Web Applications (Shared Services and EPM Workspace) ● ERP Integrator Web Application ● FDM Web Application	Required: ● FDM Server ● FDM Task Manager ● FDM Load Balancer When using Financial Management, Essbase, Planning, or Oracle Hyperion Enterprise® as target systems, the target system clients must be installed on the same server as FDM: ● Financial Management Client ● Essbase Client ● Oracle Hyperion Enterprise® Client

Note: For information about which releases of these required products are compatible with the current release of a particular EPM System product, see the Release Compatibility tab in the *Oracle Hyperion Enterprise Performance Management System Certification Matrix* (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html).

Component Installation By Tier and Installation Assemblies

Use the information in this section to help plan which ZIP files to download and which assemblies are required for EPM System product components.

Tip: Oracle recommends that you download ZIP files to a shared drive. If you follow this recommendation, you need not use the following tables to determine which ZIP files are required for each product component.

Note: By default, for most products, EPM System Installer installs 32-bit products on 32-bit operating systems and 64-bit products on 64-bit operating systems for the Web and Services tier. EPM System Installer installs 32-bit client products on all operating systems. For Essbase Server and Essbase Client, EPM System Installer installs both 32-bit and 64-bit components on a 64-bit operating system. EPM System Configurator configures only 64-bit components on 64-bit operating systems.

The following sections describe the components and services available for installation on each tier (Client, Web, and Services) for each product when you install using the option “Choose components individually.” See [“EPM System Software Dependencies” on page 29](#) for information on which components are required and optional for your product.

The following tables also describe the ZIP files and installation assemblies required to install each component.

Foundation Services

The following table describes the components installed on each tier for Foundation Services products and the ZIP files and installation assemblies required to install that component.

Table 9 Foundation Services Assemblies and Download Files

Client Tier	Web Tier	Services Tier
	Foundation Services Web Applications (Installs Shared Services and EPM Workspace) Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● sharedServices ● biplus_workspace_new_webapp Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 6 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7	
	Static Content Files Required Assemblies ● staticContent Required Download Files ● Oracle Hyperion Enterprise Performance Management System Additional Content Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
	Oracle HTTP Server Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● ohs ● oracle_common ● WebLogic upgrade jar file ● staticContent Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 3 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 4 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Enterprise Performance Management System Additional Content Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
	WebLogic Application Server Required Assemblies ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7	
Performance Management Architect Batch client Required Assemblies ● bpm_architect_batch_client ● commonComponents ● productCommonComponents ● oracle_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Enterprise Performance Management Architect, Fusion Edition Release 11.1.2.1.0		

Client Tier	Web Tier	Services Tier
Performance Management Architect File Generator (Windows only) Required Assemblies ● bpm_architect_generator ● commonComponents ● productCommonComponents Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Enterprise Performance Management Architect, Fusion Edition Release 11.1.2.1.0		

Client Tier	Web Tier	Services Tier
	Performance Management Architect Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● bpm_architect_webapp Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Enterprise Performance Management Architect, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
	Performance Management Architect Data Synchronizer Service Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● bpm_architect_datasync Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Enterprise Performance Management Architect, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
		Performance Management Architect Dimension Server Service (Windows only) Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● bpm_architect_services Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Enterprise Performance Management Architect, Fusion Edition Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
	Calculation Manager Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● calc Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Calculation Manager Release 11.1.2.1.0	

Essbase

The following table describes the components installed on each tier for Essbase products and the ZIP files and installation assemblies required to install that component.

EPM System Installer installs both 32-bit and 64-bit Essbase Server and Essbase Client on a machine with a 64-bit operating system. EPM System Installer installs only 32-bit Essbase Server and Essbase Client on a machine with a 32-bit operating system. EPM System Configurator configures only 64-bit Essbase on a machine with a 64-bit operating system and 32-bit Essbase on a machine with a 32-bit operating system.

If required, you can manually configure 32-bit Essbase client or server on a 64-bit machine. See [Appendix C, “Additional Essbase Configuration.”](#)

Table 10 Essbase Assemblies and Download Files

Client Tier	Web Tier	Services Tier
Essbase Client Required Assemblies ● commonComponents ● productCommonComponents ● essbaseProductCommonComponents ● essbase_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Essbase Clients Release 11.1.2.1.0		
Essbase Client C API Required Assemblies ● commonComponents ● productCommonComponents ● essbaseProductCommonComponents ● essbase_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Essbase Clients Release 11.1.2.1.0		
Essbase Administration Services Console (Windows only) Required Assemblies ● commonComponents ● productCommonComponents ● essbase_administration_services_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Essbase Clients Release 11.1.2.1.0		

Client Tier	Web Tier	Services Tier
Essbase Studio Console (Windows only) Required Assemblies ● commonComponents ● productCommonComponents ● essbase_studio Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Essbase Clients Release 11.1.2.1.0		
Essbase Integration Services Console (Windows only) Required Assemblies ● commonComponents ● productCommonComponents ● essbaseProductCommonComponents ● essbase_integration_services Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Essbase Release 11.1.2.1.0 Part 1 of 2		

Client Tier	Web Tier	Services Tier
	Essbase Administration Services (installs Business Rules automatically) Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● essbase_administration_services_webapp Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Essbase Release 11.1.2.1.0 Part 1 of 2	

Client Tier	Web Tier	Services Tier
	Provider Services Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● analytic_services_provider_webapp Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Essbase Release 11.1.2.1.0 Part 1 of 2	

Client Tier	Web Tier	Services Tier
		● Essbase Integration Services Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● essbase_integration_services Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Essbase Release 11.1.2.1.0 Part 1 of 2

Client Tier	Web Tier	Services Tier
		Essbase Studio Server Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● essbase_studio_services Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Essbase Release 11.1.2.1.0 Part 1 of 2

Client Tier	Web Tier	Services Tier
		● Essbase Server Note: On a machine with a 64-bit operating system, EPM System Installer installs both 32-bit and 64-bit binaries. Note: EPM System Installer installs WebLogic Server on the Essbase Server machine even if you are installing Essbase for a standalone installation. Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● essbase_services ● ohs ● staticContent Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 3 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 4 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Essbase Release 11.1.2.1.0 Part 2 of 2 for <i>PlatformName</i> ● Oracle Hyperion Enterprise Performance Management

Client Tier	Web Tier	Services Tier
		System Additional Content Release 11.1.2.1.0

Reporting and Analysis

The following table describes the components installed on each tier for Reporting and Analysis products and the ZIP files and installation assemblies required to install that component.

Table 11 Reporting and Analysis Assemblies and Download Files

Client Tier	Web Tier	Services Tier
	Framework Web Application Required Assemblies - commonComponents - essbaseProductCommonComponents - ocm - productCommonComponents - tools - webLogicCommonComponent - oracle_common - WebLogic upgrade jar file - biplus_workspace_webapp - biplus_portlets_webapp Required Download Files - Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 - Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 - Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 - Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 - Oracle Hyperion Enterprise Performance Management Reporting and Analysis Core Components Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
		Framework Services and Common Libraries Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● biplus_core_services ● biplus_migration_utility Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Enterprise Performance Management Reporting and Analysis Core Components Release 11.1.2.1.0
Interactive Reporting Studio (Windows only) Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● biplus_interactive_reporting_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Hyperion Interactive Reporting Release 11.1.2.1.0 Part 1 of 2		

Client Tier	Web Tier	Services Tier
Interactive Reporting Dashboard Development Services (Windows only) Required Assemblies ● commonComponents ● productCommonComponents ● essbaseProductCommonComponents ● biplus_dds Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Hyperion Interactive Reporting Release 11.1.2.1.0 Part 1 of 2		

Client Tier	Web Tier	Services Tier
		Interactive Reporting Services Required Download Files ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● biplus_interactive_reporting_services ● biplus_core_services Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Hyperion Interactive Reporting Release 11.1.2.1.0 Part 2 of 2 for <i>PlatformName</i> ● Oracle Hyperion Enterprise Performance Management Reporting and Analysis Core Components Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
Production Reporting		
SQR Production Reporting Studio (Windows only) Required Assemblies ● commonComponents ● biplus_product_reporting_client ● biplus_product_reporting_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Hyperion SQR Production Reporting Release 11.1.2.1.0 Part 1 of 2		
SQR Production Reporting Activator (Windows only) Required Assemblies ● commonComponents ● biplus_product_reporting_client ● biplus_product_reporting_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Hyperion SQR Production Reporting Release 11.1.2.1.0 Part 1 of 2		
SQR Production Reporting Remote (Windows only) Required Assemblies ● commonComponents ● biplus_product_reporting_client ● biplus_product_reporting_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Hyperion SQR Production Reporting Release 11.1.2.1.0 Part 1 of 2		

Client Tier	Web Tier	Services Tier
SQR Production Reporting Viewer (Windows only) Required Assemblies ● commonComponents ● biplus_product_reporting_client ● biplus_product_reporting_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Hyperion SQR Production Reporting Release 11.1.2.1.0 Part 1 of 2 ● Oracle Hyperion Enterprise Performance Management Reporting and Analysis Core Components Release 11.1.2.1.0		

Client Tier	Web Tier	Services Tier
		SQR Production Reporting Engine (DB2, DDO, Informix, ODBC, Oracle, Sybase, Teradata (UNIX only)) Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● biplus_product_reporting_services ● biplus_product_reporting_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Hyperion SQR Production Reporting Release 11.1.2.1.0 Part 1 of 2 ● Hyperion SQR Production Reporting Release 11.1.2.1.0 Part 2 of 2 for <i>PlatformName</i>

Client Tier	Web Tier	Services Tier
Financial Reporting		
	Financial Reporting Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● biplus_financial_reporting_webapp ● biplus_financial_reporting_common ● hfm_client, if you are using Financial Reporting with Financial Management ● hfm_common, required for Financial Management components Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Reporting, Fusion Edition Release 11.1.2.1.0 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
Web Analysis		
	Web Analysis Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● biplus_webanalysis_webapp ● hfm_client, if you are using Web Analysis with Financial Management ● hfm_common, required for Financial Management components ● biplus_core_services Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Hyperion Web Analysis Release 11.1.2.1.0 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0 ● Oracle Hyperion Enterprise Performance Management Reporting and Analysis Core Components Release 11.1.2.1.0	

Financial Performance Management Applications

The following table describes the components installed on each tier for Financial Performance Management Applications products and the ZIP files and installation assemblies required to install that component.

Table 12 Financial Performance Management Applications Assemblies and Download Files

Client Tier	Web Tier	Services Tier
Planning		
	Planning Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● planning ● rmi ● essbase_services Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Planning, Fusion Edition Release 11.1.2.1.0 ● Oracle Essbase Release 11.1.2.1.0 Part 2 of 2 for <i>PlatformName</i>	

Client Tier	Web Tier	Services Tier
Financial Management (All components are Windows only)		
Financial Management Client Required Assemblies ● commonComponents ● hfm_client ● hfm_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0		
Financial Management Sample Applications and Starter Kits Required Assemblies ● commonComponents ● hfm_client ● hfm_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0		

Client Tier	Web Tier	Services Tier
Financial Management ADM Driver Required Assemblies ● commonComponents ● productCommonComponents ● hfm_client ● hfm_common Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0		

Client Tier	Web Tier	Services Tier
	Financial Management IIS Web Applications Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hfm_webapp ● hfm_common ● hfm_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
	Financial Management Web Service Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hfm_webapp ● hfm_common ● hfm_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
		Financial Management Service Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hfm_common ● hfm_services ● hfm_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
Performance Scorecard		
	Performance Scorecard Web Reports Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hps_webapp Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Performance Scorecard, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
	Performance Scorecard Alerter Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hps_webapp Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Performance Scorecard, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
	Performance Scorecard ETL Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hps_webapp Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Performance Scorecard, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
Strategic Finance (All components are Windows only)		
	Strategic Finance Web Services Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hsf_server Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Strategic Finance, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
		Strategic Finance Service Note: Strategic Finance integration with Essbase and Planning is automatically installed. Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hsf_server Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Strategic Finance, Fusion Edition Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
		Strategic Finance Integration with Financial Management Services (Server)¹ Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hsf_server Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Strategic Finance, Fusion Edition Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
		Strategic Finance Integration with Enterprise Services (Server)² Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hsf_server Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Strategic Finance, Fusion Edition Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
Profitability and Cost Management		
	Profitability and Cost Management Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hpm Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Profitability and Cost Management, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
Disclosure Management		
	Disclosure Management Web Application (Windows only) Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● disclosure Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Disclosure Management Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
Financial Close Management		
	Financial Close Management Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● financial_close Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Close Management Release 11.1.2.1.0	

¹You must also install the Financial Management client.

²You must first install the Enterprise client.

Data Management

The following table describes the components installed on each tier for Data Management products and the ZIP files and installation assemblies required to install that component.

Table 13 Data Management Assemblies and Download Files

Client Tier	Web Tier	Services Tier
FDM (All components are Windows only)		
FDM Workbench Client Required Assemblies ● commonComponents ● productCommonComponents ● fdm Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Financial Data Quality Management, Fusion Edition Release 11.1.2.1.0		

Client Tier	Web Tier	Services Tier
	FDM Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● fdm Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Data Quality Management, Fusion Edition Release 11.1.2.1.0	

Client Tier	Web Tier	Services Tier
		FDM Load Balancer Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● hfm_client ● fdm Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Data Quality Management, Fusion Edition Release 11.1.2.1.0 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
		FDM Task Manager Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● fdm ● hfm_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Data Quality Management, Fusion Edition Release 11.1.2.1.0 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
		FDM Server Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● fdm ● hfm_client Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Data Quality Management, Fusion Edition Release 11.1.2.1.0 ● Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0

Client Tier	Web Tier	Services Tier
ERP Integrator		
	ERP Integrator Web Application Required Assemblies ● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools ● webLogicCommonComponent ● oracle_common ● WebLogic upgrade jar file ● aif Required Download Files ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7 ● Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7 ● Oracle Hyperion Financial Data Quality Management, Fusion Edition Release 11.1.2.1.0	

Download File Contents

The following table describes the contents of each download file on the Oracle Software Delivery Cloud. Use this table to help plan your EPM System installation, if necessary.

Tip: To see the ZIP file name for each download file, see the Oracle Software Delivery Cloud.

Table 14 Download File Contents

ZIP File Name	Assemblies
Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition Release 11.1.2.1.0 for <i>PlatformName</i>	N/A. Contains EPM System Installer.

ZIP File Name	Assemblies
Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 1 of 7	● commonComponents ● essbaseProductCommonComponents ● ocm ● productCommonComponents ● tools
Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 2 of 7	● webLogicCommonComponent
Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 3 of 7	● ohs
Oracle Hyperion Foundation Services Release 11.1.2.1.0 for <i>PlatformName</i> Part 4 of 7	● ohs_patchset
Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 5 of 7	● oracle_common
Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 6 of 7	● biplus_workspace_new_webapp ● sharedServices
Oracle Hyperion Foundation Services Release 11.1.2.1.0 Part 7 of 7	● WebLogic upgrade jar file
Oracle Hyperion Calculation Manager Release 11.1.2.1.0	● calc
Oracle Hyperion Enterprise Performance Management Architect, Fusion Edition Release 11.1.2.1.0	● bpm_architect_batch_client ● bpm_architect_datasync ● bpm_architect_generator ● bpm_architect_services ● bpm_architect_webapp
Oracle Essbase Release 11.1.2.1.0 Part 1 of 2	● analytic_services_provider_webapp ● essbase_administration_services_webapp ● essbase_integration_services ● essbase_studio_services
Oracle Essbase Release 11.1.2.1.0 Part 2 of 2 for <i>PlatformName</i>	● essbase_services
Oracle Essbase Clients Release 11.1.2.1.0	● essbase_administration_services_client ● essbase_client ● essbase_studio
Oracle Essbase Spreadsheet Add-in Release 11.1.2.1.0 for Microsoft Windows	NA. Contains Spreadsheet Add-in Installer.
Oracle Hyperion Financial Reporting, Fusion Edition Release 11.1.2.1.0	● biplus_financial_reporting_common ● biplus_financial_reporting_webapp
Oracle Hyperion Financial Reporting Studio and Print Server, Fusion Edition Release 11.1.2.1.0 for Microsoft Windows	NA. Contains Financial Reporting Studio and Print Server Installer.

ZIP File Name	Assemblies
Oracle Hyperion Enterprise Performance Management Reporting and Analysis Core Components Release 11.1.2.1.0	● biplus_core_services ● biplus_migration_utility ● biplus_portlets_webapp ● biplus_workspace_webapp
Hyperion Interactive Reporting Release 11.1.2.1.0 Part 1 of 2	● biplus_dds ● biplus__im_services ● biplus__interactive_reporting_client
Hyperion Interactive Reporting Release 11.1.2.1.0 Part 2 of 2 for <i>PlatformName</i>	● biplus_interactive_reporting_services
Hyperion SQR Production Reporting Release 11.1.2.1.0 Part 1 of 2	● biplus_product_reporting_client ● biplus_product_reporting_common
Hyperion SQR Production Reporting Release 11.1.2.1.0 Part 2 of 2 for <i>PlatformName</i>	● biplus_product_reporting_services
Hyperion Web Analysis Release 11.1.2.1.0	● biplus_webanalysis_webapp
Oracle Hyperion Financial Management, Fusion Edition Release 11.1.2.1.0	● hfm_client ● hfm_common ● hfm_services ● hfm_webapp
Oracle Hyperion Planning, Fusion Edition Release 11.1.2.1.0	● planning ● rmi
Oracle Hyperion Planning, Fusion Edition Offline Planning Module Release 11.1.2.1 for Microsoft Windows	NA. Contains Offline Planning Client Installer.
Oracle Hyperion Financial Data Quality Management, Fusion Edition Release 11.1.2.1.0	● aif ● fdm
Oracle Hyperion Financial Data Quality Management Adapter Suite, Fusion Edition Release 11.1.2.1.0 for Microsoft Windows	NA
Oracle Hyperion Financial Data Quality Management Adapter for Financial Management, Fusion Edition Release 11.1.2.1.0	NA
Oracle Hyperion Financial Data Quality Management ERP Source Adapter for SAP, Fusion Edition Release 11.1.2.1.0	NA
Oracle Hyperion Profitability and Cost Management, Fusion Edition Release 11.1.2.1.0	● hpm
Oracle Hyperion Data Relationship Management, Fusion Edition Release 11.1.2.1.0	NA. Contains Data Relationship Management installer.
Oracle Hyperion Smart View for Office, Fusion Edition Release 11.1.2.1.0 for Microsoft Windows	NA. Contains Smart View installer.

ZIP File Name	Assemblies
Oracle Hyperion Performance Scorecard, Fusion Edition Release 11.1.2.1.0	● hps_webapp
Oracle Hyperion Strategic Finance, Fusion Edition Release 11.1.2.1.0	● hsf_server
Hyperion Strategic Finance for Banking Release 11.1.2.1.0	NA. Contains Strategic Finance Client Installer.
Oracle Hyperion Disclosure Management Release 11.1.2.1.0	● disclosure
Oracle Hyperion Disclosure Management Client Release 11.1.2.1.0 for Microsoft Windows	NA. Contains Disclosure Management Client Installer.
Oracle Hyperion Financial Close Management Release 11.1.2.1.0	● financial_close
Oracle Hyperion Enterprise Performance Management System Additional Content Release 11.1.2.1.0	● staticContent

3

Installing EPM System Products

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Installation Prerequisites

Subtopics

- [Oracle HTTP Server Installation Prerequisites](#)
- [Financial Close Management Installation and Configuration Prerequisites and Roadmap](#)
- [Maintenance Release Installation Prerequisites](#)

Note the following installation prerequisites.

- See the *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for installation prerequisites for preparing a database, preparing IIS for products that require it, and preparing Web browsers.
- If you plan to deploy EPM System products in an SSL-enabled environment, review the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* before you install and configure. The SSL implementation you choose affects the options you choose during configuration.
- If you are installing on Windows 2008, disable UAC before installing. UAC must be disabled to install, configure, and run EPM System products. UAC can be enabled on end-user client desktops.
- Ensure that there is 1 GB of temp space available.
- Before you install Essbase on a 64-bit Linux system, install the 64-bit version of the `libaio` package version 0.3.105-2 or higher.

- If you are installing on the same machine on which Oracle Business Intelligence Enterprise Edition or Oracle Business Intelligence Publisher are installed, install into two different Middleware homes. The products rely on different releases of Fusion Middleware.
- For ERP Integrator, you must install Oracle Data Integrator, which is available on EDelivery in the Oracle Enterprise Performance Management Media Pack, and then apply 9377717 - Oracle Data Integrator 10.1.3.6.0 Patch Set, which is available on My Oracle Support. When you are setting up Oracle Data Integrator, set `ODI_JAVA_HOME` to a JDK 1.5 home.
- If you want to include Microsoft Office documents (Word, Excel, PowerPoint) in your Financial Reporting PDF books or reports with cell documents, then the corresponding Office products must be preinstalled prior to installing Financial Reporting Print Server.
- Install Microsoft Excel on the FDM Server machine.
- Install Microsoft Office Professional before installing Disclosure Management. To use Disclosure Management Client, when you install Microsoft Office, you must select **.NET programmability support** for Word and Excel.
- Typically, EPM System Installer installs WebLogic Server for you. If you have an existing WebLogic Server installation and want to use it instead of the WebLogic Server installed by EPM System Installer, note the Middleware home location for the WebLogic Server installation. During installation, you must install EPM System products to this same Middleware home. If EPM System Installer detects an existing WebLogic Server installation in the installation location, it does not install WebLogic Server.
- If you have an existing Oracle SOA Suite installation you plan to use with Financial Close Management, note the Middleware home location for the Oracle SOA Suite installation. During installation, you must install EPM System products to this same Middleware home.
- If you are installing FDM or Strategic Finance using Terminal Services, switch your session to installation mode before you run EPM System Installer (`change user /install`).
- If you plan to install the Strategic Finance Integration with Enterprise, you must install the Enterprise client first.

Upgrade Note!

If you are upgrading, follow the upgrading checklist and perform the upgrade installation prerequisites. See [“Upgrading Checklist” on page 177](#) and [“Upgrade Installation Prerequisites” on page 182](#).

Oracle HTTP Server Installation Prerequisites

EPM System Installer installs Oracle HTTP Server during the installation of Foundation Services, using the Oracle HTTP Server silent installer.

You must install Oracle HTTP Server even if you do not plan to use it as your Web server, because EPM System Configurator activates the Web server configuration task with the Oracle HTTP Server installation. During Web server configuration with EPM System Configurator, you can specify the Web server to use.

Before you begin installation, ensure that you meet the installation prerequisites for Oracle HTTP Server and review the Oracle HTTP Server installation documentation and Release Notes for details on certified operating systems and supported UNIX / Linux packages and important installation issues and workarounds.

- For Oracle HTTP Server system requirements information, go to: http://www.oracle.com/technology/software/products/ias/files/fusion_requirements.htm.
- For Oracle HTTP Server certification information, go to: http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html.
- For Oracle HTTP Server installation information, see the Oracle HTTP Server installation documentation: http://download.oracle.com/docs/cd/E15523_01/webtier.htm) and Release Notes (http://download.oracle.com/docs/cd/E15523_01/relnotes.htm).
- For Oracle HTTP Server installation issues and workarounds, see the readme for your platform: http://download.oracle.com/docs/cd/E15523_01/relnotes.htm.

On AIX, if you are using Oracle HTTP Server with Oracle Database, you must run `rootpre.sh` as the `root` user before you install Oracle HTTP Server. Run this script once on each machine in the deployment. The file is in `SystemInstaller-11120-aix.zip`. For details see the [Oracle® Fusion Middleware Release Notes 11g Release 1 \(11.1.1\) for AIX Based Systems \(64-Bit\)](http://download.oracle.com/docs/cd/E15523_01/doc.1111/e14771/toc.htm) (http://download.oracle.com/docs/cd/E15523_01/doc.1111/e14771/toc.htm).

On Windows, ensure that you have a paging file size of at least 512 MB. Do not select the option to automatically manage paging file size.

Note: EPM System Installer also installs Oracle HTTP Server on the machine hosting the Essbase Server to support OPMN, so these prerequisites apply to the Essbase Server machine as well. (Note that you only need to configure Oracle HTTP Server on the machine hosting the Web server.)

Before beginning the installation, EPM System Installer runs prerequisite checks for Oracle HTTP Server. If this test reports any errors (reported on the Welcome page of EPM System Installer), review the Oracle HTTP Server documentation for solutions.

Caution! Do not proceed with EPM System product installation until all of the Oracle HTTP Server prerequisites have passed.

During installation with EPM System Installer, check the Installation status for information about Oracle HTTP Server installation status. If Oracle HTTP Server installation fails, check the logs for details. The logs report information from the Oracle HTTP Server silent installer. You can find the logs in:

- Windows: `EPM_ORACLE_HOME/diagnostics/logs/ohs`
- UNIX: `EPM_ORACLE_HOME/diagnostics/logs/install/common-ohs-oui-out.log`

You can also review the Oracle HTTP Server product logs. For more information about Web server logs, see the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

Financial Close Management Installation and Configuration Prerequisites and Roadmap

For Financial Close Management, you must install Oracle SOA Suite and all its required patches.

Note: If you are applying the maintenance release to move from Financial Close Management Release 11.1.2.0 to Release 11.1.2.1, see [“Financial Close Management Maintenance Release Installation Prerequisites” on page 91](#).

Note: In a distributed environment, you must install Oracle SOA Suite on the following machines in the deployment, although you need to configure it on only one machine (the machine on which you want to run SOA Server): Financial Close Management, WebLogic Administration Server, Foundation Services, and if you are integrating with these products: Financial Management (Web application), Financial Reporting (Web application), FDM (Web application).

Note: Oracle SOA Suite and EPM System must be deployed to the same WebLogic domain.

In addition, for a distributed environment, ensure that you review [“Installing EPM System Products in a Distributed Environment” on page 94](#) for additional requirements.

The following tables provide an overview of the installation and configuration process for Oracle SOA Suite and Financial Close Management in the following scenarios:

- In a new deployment, where you have not installed or configured any EPM System products.
- In an existing deployment, where you have already installed and configured some EPM System products and now want to extend the deployment to include Financial Close Management and Oracle SOA Suite.

Table 15 Roadmap for Installing and Configuring Oracle SOA Suite and Financial Close Management in a new EPM System Deployment

Task	Reference
Install EPM System products. Note: In a distributed environment, on the machine on which you plan to administer the WebLogic Server, you must install all Web applications for all applications you plan to deploy on any machine in the environment. A default installation of EPM System installs WebLogic Server, which is required for Oracle SOA Suite. The WebLogic Administration Server is installed and deployed on the Foundation Services machine.	“Installing EPM System Products” on page 97. In addition, for a distributed environment, ensure that you review “Installing EPM System Products in a Distributed Environment” on page 94 for additional requirements.

Task	Reference
If you are using Microsoft SQL Server, review “XA Configuration Required to Start the SOA Infrastructure on Microsoft SQL Server 2008 ” in the <i>Oracle® Fusion Middleware Release Notes 11g Release 1 (11.1.1) for Microsoft Windows (32-Bit)</i>.	http://download.oracle.com/docs/cd/E15523_01/relnotes.1111/e10132/soa.htm#CDEIFEAC
Run the Repository Creation Utility and install Oracle SOA Suite. Note: In a distributed environment, you must install Oracle SOA Suite on the following machines in the deployment, although you need to configure it on only one machine (the machine on which you want to run SOA Server): Financial Close Management, WebLogic Administration Server, Foundation Services, and if you are integrating with these products, Financial Management (Web application), Financial Reporting (Web application), FDM (Web application).	“Installing Oracle SOA Suite” on page 117
Configure Oracle SOA Suite, creating a new WebLogic domain. You must also install any required Oracle Fusion Middleware patches, available on My Oracle Support. Note: In a distributed environment note the following additional step: ● If Oracle SOA Suite is on a machine separate from EPM System products, you must install Foundation Services on the SOA machine. ● If Oracle SOA Suite is configured on a machine separate from the WebLogic Administration Server machine, use the <code>pack</code> command on the machine hosting the WebLogic Administration Server to pack the domain, and then use the <code>unpack</code> command to unpack it on the machine hosting the SOA Server.	“Configuring and Starting Oracle SOA Suite” on page 118 and Chapter 3, “Installing EPM System Products”
Stop the SOA managed server. Stop WebLogic Server if it is on the same machine as Foundation Services.	
Configure EPM System products, selecting all required configuration tasks except “Deploy to SOA.” During deployment, you must extend the WebLogic domain created during Oracle SOA Suite deployment. Note: Note the following information about configuring in a distributed environment: ● You must configure Foundation Services first. If you are deploying EPM System products to a domain hosted on another machine (and the domain was not created with EPM System Configurator), you must make manual updates to <code>jps-config.xml</code> and <code>system-jazn.xml</code> on the Administration Server box. See step 18 on page 241 and step 19 on page 242 of Chapter 6, “Manually Deploying EPM System Web Applications.”	“Using EPM System Configurator” on page 130
Start WebLogic Administration Server and then the SOA managed server.	“Configuring and Starting Oracle SOA Suite” on page 118
Start EPM System Configurator and select the “Deploy to SOA” task for Financial Close Management. If you are deploying EPM System products to a domain hosted on another machine (and the domain was not created with EPM System Configurator), you must also select the “Configure Web Server” task.	“Using EPM System Configurator” on page 130
Restart WebLogic Administration Server.	
In a distributed environment, if Oracle SOA Suite is on a machine separate from EPM System products, ensure that you have installed Foundation Services on the SOA machine. Then, on the SOA machine, start EPM System Configurator and configure with the default selected configuration tasks (“Configure Common Settings,” “Configure Database,” “Configure Oracle Configuration Manager”). During database configuration, specify the Foundation Services database information you entered when you configured the Foundation Services machine. Tip: You can ignore any messages about Shared Services registration failing.	Chapter 4, “Configuring EPM System Products”

Task	Reference
Perform postconfiguration tasks for Financial Close Management.	“Financial Close Management Postconfiguration Tasks ” on page 272
Stop the SOA server, and then start EPM System products, the SOA Server and Financial Close Management in the order listed.	Chapter 8, “Starting and Stopping EPM System Products,” and “Financial Close Management Application Server” on page 305
Validate the installation and verify deployment.	Chapter 9, “Validating the Installation and Verifying Deployment”

If you have already installed and configured some EPM System products, you can add Financial Close Management and Oracle SOA Suite to the existing deployment using the following roadmap:

Table 16 Roadmap for Installing and Configuring Oracle SOA Suite and Financial Close Management in an Existing EPM System Deployment

Task	Reference
Install Financial Close Management. Note: In a distributed environment, on the machine on which you plan to administer the WebLogic Server, you must install all Web applications for all applications you plan to deploy on any machine in the environment. A default installation of EPM System installs WebLogic Server, which is required for Oracle SOA Suite. The WebLogic Administration Server is installed and deployed on the Foundation Services machine.	“Installing EPM System Products” on page 97. In addition, for a distributed environment, ensure that you review “Installing EPM System Products in a Distributed Environment” on page 94 for additional requirements.
If you are using Microsoft SQL Server, review “XA Configuration Required to Start the SOA Infrastructure on Microsoft SQL Server 2008 ” in the <i>Oracle® Fusion Middleware Release Notes 11g Release 1 (11.1.1) for Microsoft Windows (32-Bit)</i>.	http://download.oracle.com/docs/cd/E15523_01/relnotes.1111/e10132/soa.htm#CDEIFEAC
Run the Repository Creation Utility and install Oracle SOA Suite. Note: In a distributed environment, you must install Oracle SOA Suite on the following machines in the deployment, although you need to configure it on only one machine (the machine on which you want to run SOA Server): Financial Close Management, WebLogic Administration Server, Foundation Services, and if you are integrating with these products, Financial Management (Web application), Financial Reporting (Web application), FDM (Web application).	“Installing Oracle SOA Suite” on page 117

Task	Reference
From the WebLogic Administration Server machine, configure Oracle SOA Suite. Note: During configuration, you must extend the WebLogic domain created during initial EPM System deployment. You must also install any required Oracle Fusion Middleware patches, available on My Oracle Support. Note: In a distributed environment note the following additional step: ● If Oracle SOA Suite is on a machine separate from EPM System products, you must install Foundation Services on the SOA machine. ● If Oracle SOA Suite is configured on a machine separate from the WebLogic Administration Server machine, use the <code>pack</code> command on the machine hosting the WebLogic Administration Server to pack the domain, and then use the <code>unpack</code> command to unpack it on the machine hosting the SOA Server. Tip: You might need to restart the Weblogic Administration Server prior to starting the SOA managed server.	“Configuring and Starting Oracle SOA Suite” on page 118 and Chapter 3, “Installing EPM System Products”
Stop the SOA managed server. Stop WebLogic Server if it is on the same machine as Foundation Services.	
Configure Financial Close Management, selecting all required configuration tasks under Financial Close Management in EPM System Configurator except “Deploy to SOA.” During deployment, you must extend the WebLogic domain created during EPM System deployment. You must also complete the Foundation Services “Configure Web Server” task.	“Using EPM System Configurator” on page 130
Start WebLogic Administration Server and then the SOA managed server.	“Configuring and Starting Oracle SOA Suite” on page 118
Start EPM System Configurator and select the “Deploy to SOA” task for Financial Close Management.	“Using EPM System Configurator” on page 130
Restart WebLogic Administration Server.	
In a distributed environment, if Oracle SOA Suite is on a machine separate from EPM System products, ensure that you have installed Foundation Services on the SOA machine. Then, on the SOA machine, start EPM System Configurator and configure with the default selected configuration tasks (“Configure Common Settings,” “Configure Database,” “Configure Oracle Configuration Manager”). During database configuration, specify the Foundation Services database information you entered when you configured the Foundation Services machine. Tip: You can ignore any messages about Shared Services registration failing.	
Perform postconfiguration tasks for Financial Close Management.	“Financial Close Management Postconfiguration Tasks” on page 272
Stop the SOA server, and then start EPM System products, the SOA Server and Financial Close Management in the order listed.	Chapter 8, “Starting and Stopping EPM System Products,” and “Financial Close Management Application Server” on page 305
Restart EPM Workspace to access Financial Close Management from EPM Workspace.	

Task	Reference
Validate the installation and verify deployment.	Chapter 9, “Validating the Installation and Verifying Deployment”

Maintenance Release Installation Prerequisites

If you are applying the maintenance release to move from EPM System Release 11.1.2 to Release 11.1.2.1, note the following installation prerequisites.

- You must apply the maintenance release on top of your existing EPM System installation.
- You must apply the maintenance release to all EPM System products in the deployment. You cannot apply the maintenance release to only some products.
- If you are applying the maintenance release to move from EPM System release 11.1.2.0 to EPM System Release 11.1.2.1, or if you are reinstalling EPM System products, you must first stop all the services for EPM System products.

Note that you must manually stop the Integration Services service manually using the Task Manager.

- If you are applying the maintenance release to move from Essbase Release 11.1.2 to Release 11.1.2.1, you must first export linked reporting object information from the 11.1.2 database, and then delete the linked reporting objects. After applying the maintenance release, import the exported linked reporting objects. See [“Essbase Maintenance Release Installation Prerequisites” on page 90](#).
- If you have an earlier release of Financial Reporting Studio, uninstall it and stop and disable the Financial Reporting Print Server service if it is running before installing the new release.
- If you have an earlier release of Spreadsheet Add-in, uninstall it before installing the new release.

Essbase Maintenance Release Installation Prerequisites

If you are applying the maintenance release to move from Essbase Release 11.1.2 to Release 11.1.2.1, you must first export linked reporting object (LRO) information from the 11.1.2 database. After installing and configuring, you import the exported linked reporting objects.

► To export linked reporting objects from Essbase Release 11.1.2:

- 1 On the machine hosting the Release 11.1.2 installation, back up the application linked reporting object data to a specified directory by using the following MAXL command:

```
EXPORT database DBS-NAME LRO to server directory 'directoryName';
```

For example:

```
MAXL> EXPORT database Sample.Basic LRO to server directory 'V1';
```

In this example, Sample.Basic LRO data is exported to Sample-Basic-V1 in ARBORPATH/app.

2 Remove the application linked reporting object data with the following MAXL command:

```
ALTER database DBS-NAME delete LRO all
```

For example:

```
MAXL> ALTER database sample.basic delete LRO all;
```

3 Shut down the Essbase Release 11.1.2 server.

4 Install and configure Essbase Release 11.1.2.1.

5 Import the linked reporting objects to Essbase Release 11.1.2.1.

For details on this step, see [“Importing Linked Reporting Objects” on page 251](#).

Financial Close Management Maintenance Release Installation Prerequisites

The following table provides an overview of the installation and configuration process for Oracle SOA Suite and Financial Close Management if you are moving from Financial Close Management Release 11.1.2.0 to Release 11.1.2.1.

Note the following about applying the maintenance release to Financial Close Management:

- The maintenance release installation option is supported from Financial Close Management Release 11.1.2.0.01 (patch set 9672729). You can use the `OPatch lsinventory` command to find out whether this patch has already been applied.
- Before you are apply the maintenance release to move from Financial Close Management Release 11.1.2.0.01 to Financial Close Management Release 11.1.2.1, make sure there are no schedules with an **Open** status.

Table 17 Roadmap for Applying the Maintenance Release to Financial Close Management

Task	Reference
Shut down all EPM System, WebLogic, and SOA services.	
Install Financial Close Management Release 11.1.2.1 on the machine hosting Financial Close Management Release 11.1.2.0. Note: During installation, select Apply Maintenance Release . You must apply the maintenance release to all EPM System products in the deployment.	“Installing EPM System Products” on page 97 .

Task	Reference
Upgrade Oracle SOA Suite components to PS3 and then apply any required patches. The following list provides an overview of the steps: ● Update the existing software (SOA components). ● Update the <code>_SOAINFRA</code> schemas. ● Update the <code>_MDS</code> Schema. ● Update configurations and stores. For more information, see section 3.8.3 in the <i>Oracle® Fusion Middleware Patching Guide 11g Release 1 (11.1.1)</i>. ● Enable WS-AtomicTransactions. For more information, see section 3.8.4 in the <i>Oracle® Fusion Middleware Patching Guide 11g Release 1 (11.1.1)</i>. ● Run the SOA Upgrade Script to upgrade the WebLogic domain. ● Update the Oracle Web Services Manager repository. Apply the following patches for Oracle Fusion Middleware, available on My Oracle Support: ● 11063511 - SPORADIC MISSING OF SUBJECT IN BUSINESS EVENT HEADER ● 11864201 - PSE FOR MLR BUG 11864201 ON TOP OF 11.1.1.4.0 (PSE #536496) Shut down the Financial Close Management managed server, the SOA Server, and all managed servers before you apply a patch. Review the patch Readmes for information on how to apply a patch. For patch 11063511, set the <code>ORACLE_HOME</code> environment variable to <code>../Oracle/Middleware/Oracle_SOA1</code>. For patch 11864201, set the <code>ORACLE_HOME</code> environment variable to <code>MIDDLEWARE_HOME/oracle_common</code>. Apply the patches on each machine on which SOA is installed.	<i>Oracle® Fusion Middleware Patching Guide 11g Release 1 (11.1.1)</i> (http://download.oracle.com/docs/cd/E17904_01/doc.1111/e16793/patch_set_installer.htm#CHDCCEAC)
Configure EPM System products, selecting all required configuration tasks except for Deploy to SOA , including database configuration and Web application deployment for Shared Services and Financial Close Management.	“Using EPM System Configurator” on page 130
Start WebLogic Administration Server.	
Perform tasks in WebLogic Administration Console: 1. Log in to the WebLogic Administration Console if you are not already logged in. and click Deployments in the left pane. 2. In the right pane, delete <code>FCCNotification</code>, <code>FCCTaskNotification</code>, and <code>FCCAlertNotification</code> from the deployments. 3. Go to Services, then JDBC, then DataSources and delete <code>EDNLocalTxSource</code> and <code>EDNSource</code>. 4. Start SOA Server. During SOA Server startup, you might see errors, because the SOA Composites on the server are from the earlier release and the underlying components are from the upgraded release. You can ignore these messages.	
Start EPM System Configurator and select the Deploy to SOA task for Financial Close Management.	“Using EPM System Configurator” on page 130
Shut down all the servers and restart them (SOA Server, WebLogic Administration Server).	

Task	Reference
Perform maintenance release postconfiguration tasks for Financial Close Management.	“Financial Close Management Postconfiguration Tasks” on page 272
Stop the SOA server, and then start EPM System products, the SOA Server and Financial Close Management in the order listed. Note that there is a new start order for Release 11.1.2.1.	Chapter 8, “Starting and Stopping EPM System Products,” and “Financial Close Management Application Server” on page 305
Update product integration types by importing the Release 11.1.2.1 versions of all product integration files. The product integration files are posted on My Oracle Support.	“Managing Integration Types” in the <i>Oracle Financial Close Management Administrator's Guide</i>.

Installation Sequence

EPM System Installer enables you to install, configure, and deploy multiple products on a machine at one time. EPM System Installer installs components in the correct order, so you can select as many products as you want to install on a machine at one time.

Before installing products:

- See “Installation Planning Checklist” in *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.
- Review the system requirements in the *Oracle Hyperion Enterprise Performance Management System Certification Matrix* (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html).
- Review the Media Pack Readme on the [Oracle Software Delivery Cloud](#) to see which products are required or optional for use with your products.

Note that EPM System Installer installs WebLogic Server on each machine where you install a Web tier or Service tier component, including Essbase Server. The .jar files that are installed as part of WebLogic Server and Oracle common directory are used by EPM System Configurator as well as common services. Note that WebLogic Server does not need to run on the Essbase Server.

Note: If you have already installed Oracle SOA Suite and WebLogic Server, but have not yet installed EPM System products, during installation, select **Apply Maintenance Release** first to install the latest WebLogic Server, and then select **New Installation** to continue with the installation of EPM System products.

The following EPM System products are not installed and configured using EPM System Installer:

- Smart View. To install Smart View using the standalone executable, see [“Installing EPM System Clients” on page 109](#).

- Spreadsheet Add-in. To install Spreadsheet Add-in using the standalone executable, see [“Installing EPM System Clients” on page 109](#).
- Financial Reporting and Financial Reporting Studio. See [“Installing Financial Reporting Studio and Financial Reporting Print Server” on page 111](#).
- Planning Offline Client. See [“Installing Planning Offline Client ” on page 112](#).
- Strategic Finance Client. See [“Installing Strategic Finance Client ” on page 112](#).
- Disclosure Management client, and optionally, Taxonomy Designer. See [“Installing EPM System Clients” on page 109](#).
- Data Relationship Management. See the *Oracle Hyperion Data Relationship Management Installation Guide*.

Installing EPM System Products in a Distributed Environment

You typically install EPM System products in a distributed environment. The number of computers you need depends on several factors, including:

- The size of the applications
- The number of users
- The frequency of concurrent use by multiple users
- Any requirements your organization has for high availability
- Your organization's security requirements

See the *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for sample deployment diagrams to help plan your deployment.

EPM System Installer simplifies the task of installing components in a distributed computing environment. You can install, configure, and validate any components you want on any computer. Once you have installed, configured, and validated the components on that machine, you can repeat the process on another machine.

For information about which assemblies you need on each machine in a distributed environment, see [Chapter 2, “Preparing for Installation.”](#)

Note the following information about planning for an installation in a distributed environment:

- If you are deploying to a shared drive (UNIX only), not all of the following notes apply.
See [“Deploying to a Shared Drive Environment \(UNIX\)” on page 20](#).
- While you can install products in any order in a distributed environment, there is a required configuration sequence in a distributed environment. In particular, note that you must configure Foundation Services first. Foundation Services must be installed and configured for other products to configure successfully. To configure Foundation Services, select the Foundation tasks on the Task Selection panel of EPM System Configurator: “Configure

Common Settings,” “Configure Database,” “Configure Oracle Configuration Manager,” and “Deploy to Application Server.” Configure the Web server last.

See [“Configuration Sequence in a Distributed Environment” on page 123](#).

- In a distributed environment, EPM Oracle home must be the same on each machine. For example, if the path for EPM Oracle home is `/Oracle/Middleware` on the first machine you configure, it must be `/Oracle/Middleware` on all the machines in the deployment.
- On the machine on which you plan to administer the WebLogic Server, you must install all Web applications for all applications you plan to deploy on any machine in the environment. (The WebLogic Administration Server is installed and deployed on the Foundation Services machine.)
- On each remote machine in a distributed environment, install the Web applications you plan to run on that machine and then use EPM System Configurator to deploy the Web applications automatically, or manually deploy the Web applications.

Note that EPM System Installer installs WebLogic Server on each machine (for Web tier and Service tier components) in a distributed environment.

- If you are deploying Web applications on a machine other than the WebLogic Administration Server machine, WebLogic Administration Server must be running.
- All Web applications in an EPM System deployment must be deployed on either all Windows machines or on all UNIX machines. However, because Financial Management runs only on Windows, if you are using Financial Management with Reporting and Analysis, you must also deploy Reporting and Analysis on a Windows machine. (Financial Management is not supported as a data source on a UNIX platform.) If your other Web applications are deployed to UNIX machines, you must deploy Financial Reporting and Web Analysis on Windows using a manual process.

See [“Deploying Financial Reporting and Web Analysis on Windows for use with Financial Management” on page 246](#).

- You can have more than one OHS Web server in a deployment for load balancing and failover. In this scenario, configure the Web server on each machine in the environment.
- If you are using IIS as the Web server, install each IIS application so that it is co-located with an IIS Web server. This means that any machine hosting an IIS application also requires an IIS Web server.
- If you are installing in multiple environments (for example, Development, Test, and Production), install Foundation Services products in each environment.
- You must install the Financial Management Smart View Provider and the Financial Management LCM Provider on the same box as the Financial Management Web application.
- For IIS 6.0, you cannot install 32-bit components on a 64-bit system on which 64-bit components are already installed. You must install the 32-bit components on another system or install all of the 32-bit components on a 32-bit system. Specifically FDM (32-bit) and Strategic Finance (32-bit) cannot be deployed on the same computer where Financial Management (64-bit) and Performance Management Architect (64-bit) are deployed. On 32-bit platforms, all EPM System products can co-exist. For IIS 7 (the default on Windows 2008 systems), 32-bit and 64-bit components can co-exist.

- During configuration, the Oracle HTTP Server machine needs connectivity to the machine hosting the Shared Services Registry.
- EPM System static content, including product online Help, is installed with Oracle HTTP Server.
- In a distributed environment, for Financial Close Management, you must install Oracle SOA Suite on the following machines in the deployment, although you need to configure it on only one machine (the machine on which you want to run SOA Server): Financial Close Management, WebLogic Administration Server, Foundation Services, Financial Management (Web application), Financial Reporting (Web application), FDM (Web application).

Note: Oracle SOA Suite and EPM System must be deployed to the same domain.

- For FDM, when you are using Financial Management, Essbase, Planning, or Hyperion Enterprise as target systems, the target system clients must be installed on the same server as FDM.
- If you are using FDM and you are using IIS as the Web Server to host EPM Workspace, you must install the FDM Web application and the EPM Workspace Web application on the same box.
- If you are using Financial Management and IIS as the Web Server, you must install Financial Management Web applications and the Web Server on the same box.
- If you are using Performance Management Architect and IIS as the Web Server, you must install Performance Management Architect Web applications and the Web Server on the same box.

Characters Supported for Installation and Configuration

The following characters are supported during installation and configuration with EPM System Installer and EPM System Configurator.

Table 18 Characters Supported for Installation and Configuration

Fields	Supported Characters	Blocked Characters
PATH	Alphanumeric, dash (-), underscores (_), periods (.), and tildes (~). Tildes are supported only on Microsoft Windows.	All others
Host name	Alphanumeric, dash (-), and dot(.). EPM System supports IPv6 addresses. However, during installation and configuration, you must enter the host name, not the IPv6 address.	All others
User name	Alphanumeric characters including non-English (extended and double-byte) characters, except for the blocked characters	+ * / # [] { } () ; : , @ ! “

Fields	Supported Characters	Blocked Characters
Clusters, database names, and other general fields such as DSN names	Alphanumeric characters including non-English (extended and double-byte) characters, except for the blocked characters	+ . - * \ / # [] { } () ; : , @ ! " ' & % ^ _ ` ~

Installing EPM System Products

You can install EPM System products using the graphical user interface, using the console mode interface, or using a silent mode installation response file.

When you install EPM System products, you choose which type of installation to perform:

- New installation.
Note that you also choose this option if you are upgrading from an earlier release (Release 11.1.1.3.x, Release 9.3.3.x, or Release 9.2.1.x.)
- Apply maintenance release, if you are moving from Release 11.1.2.0 to Release 11.1.2.1.
- Re-install this release

For each type of installation, you choose whether to install EPM System products by tier or by individual component:

- Select “Choose components by tier” to install all the product components for the selected products by tier (Client, Web application, and Services). You still have the option to specify installation location and the products to install.
- Select “Choose components individually” if you want more control over which services and components are installed for each product component.

Oracle recommends that you install EPM System products by tier.

Note: On Windows machines, do not use the `Administrator` user to install and configure. Run EPM System Installer and EPM System Configurator as a user with administrator rights. Install and configure as the same user for all EPM System products. If you are using Windows 2008, install with UAC disabled. UAC must be disabled to install, configure, and run EPM System products. UAC can be enabled on end-user client desktops.

Note: On UNIX machines, do not use the `root` user to install and configure. Install and configure as the same user for all EPM System products. On UNIX machines, for all Oracle products, the user that is installing must be part of the same group; the group must have write permission to the central inventory (`oraInventory`).

Note: When you upgrade or apply the maintenance release, install and configure using the same user that was used to install and configure the earlier release.

Note: You cannot run EPM System Installer at the same time that you are running another instance of an Oracle Universal Installer (such as the installer for Oracle Database).

Note: Run EPM System Installer from a mapped drive, not from a UNC address.

► To install EPM System products:

1 Choose a method:

- (Windows) Double-click `installTool.cmd` in the root directory to which you extracted the EPM System Installer files.
- (Windows) From a Windows console, change to the root directory to which you extracted the EPM System Installer files and enter `installTool.cmd -console`.
- Create a silent installation response file. See [“Performing Silent Installations” on page 106](#).
- (UNIX) Change to the root directory to which you extracted the EPM System Installer files and enter `./installTool.sh`.
- (UNIX) Change to the root directory to which you extracted the EPM System Installer files and enter `./installTool.sh -console`.

EPM System Installer performs some initial checks while launching. Review the command prompt window for details. If you see a message in the command prompt window that User Account Control (UAC) is enabled on Windows 2008 systems, disable UAC, reboot, and then restart EPM System Installer.

EPM System Installer launches.

Tip: The first page of EPM System Installer might open hidden behind other windows if you navigate away from the EPM System Installer window or try to reposition the initial window. Press Alt+Tab to switch to the first page of the wizard.

2 Select a language.

Throughout EPM System Installer, if a component is not available for installation in the language you selected, it is shaded in color and marked with an asterisk (*).

3 Review and complete each page of EPM System Installer, clicking or selecting **Next to move to the next page.**

In console mode, enter the number beside the selection you want.

Tip: EPM System Installer starts to display the progress indicator after it has prepared the list of assemblies to install. This might take several minutes, depending on how many products you selected. EPM System Installer displays progress incrementally as each assembly's installation is complete.

The following table provides links where you can find more details about each page of EPM System Installer.

Table 19 EPM System Installer Pages

Page	Reference
Welcome	“Welcome” on page 99
Destination/MiddleWare Home	“Destination/Middleware Home” on page 100
Installation Type	“Installation Type” on page 101
Product Selection	“Product Selection” on page 102
Confirmation	“Confirmation” on page 105
Progress	“Progress” on page 106
Summary	“Summary” on page 106

- 4 When installation is complete, click or select **Configure** to configure the products using EPM System Configurator, or click or select **Finish** to close EPM System Installer.

Note: If you are installing Financial Close Management, note that it requires additional steps before you configure with EPM System Configurator. See [“Configuration Prerequisites for Financial Close Management” on page 117](#).

For more information about configuring EPM System products, see [Chapter 4, “Configuring EPM System Products.”](#)

After you install and configure the products, start the services as described in [Chapter 8, “Starting and Stopping EPM System Products.”](#) You can then use EPM System Diagnostics to validate that the installation was successful and that the components are communicating. See [Chapter 9, “Validating the Installation and Verifying Deployment.”](#)

Welcome

- Review the prerequisites carefully before you continue the installation. When you have confirmed that your system meets the prerequisites to run EPM System Installer, click or select **Next** to continue the installation.

EPM System Installer checks for the following:

- Whether the computer host name resolves to an IP address. If the machine host name resolves to an IP address, EPM System Installer provides a warning. Oracle recommends that you resolve this issue and provide a host name instead of an IP address before proceeding.
- Whether your system has a supported operating system.

- Whether your system meets minimum memory requirements to run the installation.
- Whether the user installing has administrator privileges (Windows only).
- Whether your system meets environment variable prerequisites.
- Whether the inventory is writable.
- Whether there is 1 GB of temp space available.
- Basic pre-installation checks for Oracle HTTP Server and WebLogic Server.
- In addition, EPM System Installer runs prerequisite checks for Oracle HTTP Server. If this test reports any errors, review the Oracle HTTP Server documentation for solutions. (See [“Oracle HTTP Server Installation Prerequisites” on page 84](#) for details on finding the Oracle HTTP Server documentation and readmes.)

Caution! Do not proceed with EPM System product installation until all of the Oracle HTTP Server prerequisites have passed.

A check mark indicates that your system meets EPM System Installer prerequisites. If any of the prerequisite items do not display a check mark, and you choose to continue, the installation might not succeed.

Tip: If you are using a `hosts` file to resolve your host name, the host name resolves to the first entry in your `hosts` file. To prevent potential communication problems in a distributed environment, ensure that the first entry in your `hosts` file is the machine's fully qualified domain name so that the fully qualified name is stored in the Shared Services Registry.

Destination/Middleware Home

- Specify the destination for the installation location, or browse to a location and select it, and then click or select **Next**. The default location is `Oracle/Middleware`.

The destination you specify becomes the Middleware home. By default EPM System Installer creates a default EPM Oracle home under the Middleware home. The default location is `Oracle/Middleware/EPMSys11R1`.

See [“About Middleware Home, EPM Oracle Home, and EPM Oracle Instance” on page 17](#).

Note the following information about the Middleware home:

- Ensure that this destination has enough disk space to install all the products that you want to install on this machine. See *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for disk space requirements.
- You select a Middleware home for each machine in your environment.

In a distributed environment, EPM Oracle home must be the same on each machine. For example, if the path for EPM Oracle home is `/Oracle/Middleware` on the first machine you configure, it must be `/Oracle/Middleware` on all the machines in the deployment.

- If you are reinstalling EPM System products on this machine, adding products to your installation, or applying the maintenance release, the existing location for the Middleware home is listed as the default installation destination, and you cannot change it.
- The destination path cannot contain spaces; for example, `c:\Program Files` is not acceptable (unless you use short path notation).
- The first character must be an alphanumeric character.

Note: If you previously used EPM System Installer, and you saved the installation selections to a file, you can load the selections to prepopulate the installation destination and the products to install. Doing so is useful if you are installing the same products on multiple machines. Click **Load**, browse to the saved selections file, and click **Open**.

Installation Type

- Select an installation type, and then click or select **Next**. If an installation type is not applicable on this machine, the option is unavailable.

Note: You cannot combine installation types in one session. For example, you cannot perform a new installation of one product at the same time you perform a reinstallation of another product.

Choose from the following installation types:

- “New installation”
 - Choose this option if you are installing an EPM System product for the first time on this computer.
 - Choose this option if you want to install additional components that you did not initially install.
 - Choose this option if you are upgrading from an earlier release of EPM System products. You must install to a new installation location on a machine with an existing earlier release of EPM System products or to a new machine.

- “Apply maintenance release”

Choose this option if you already installed release 11.1.2.0. This release provides a maintenance release for release 11.1.2.0.

If you are applying the maintenance release, you must first stop all EPM System services.

If you are applying the maintenance release, EPM System Installer applies the release to all installed 11.1.2.0 products. You cannot apply the maintenance release to only some products in your deployment.

- “Re-install this release”

Choose this option if you already installed this version of this EPM System product and want to reinstall it, for example if you need to repair an existing installation.

If you are reinstalling EPM System products, you must first stop all EPM System services.

Choose one of the following options:

- Select “Choose Components By Tier” if you want to install all the components, by tier, for the selected products. You still have the option to specify installation location and the products to install. This is the simplest path, and is recommended unless you want to customize the installation.
- Select “Choose Components Individually” if you want more control over which services and components are installed for each product component.

See [Chapter 2, “Preparing for Installation”](#) for more information about what is installed for each type of installation. Some components are available only if you select “Choose Components Individually.”

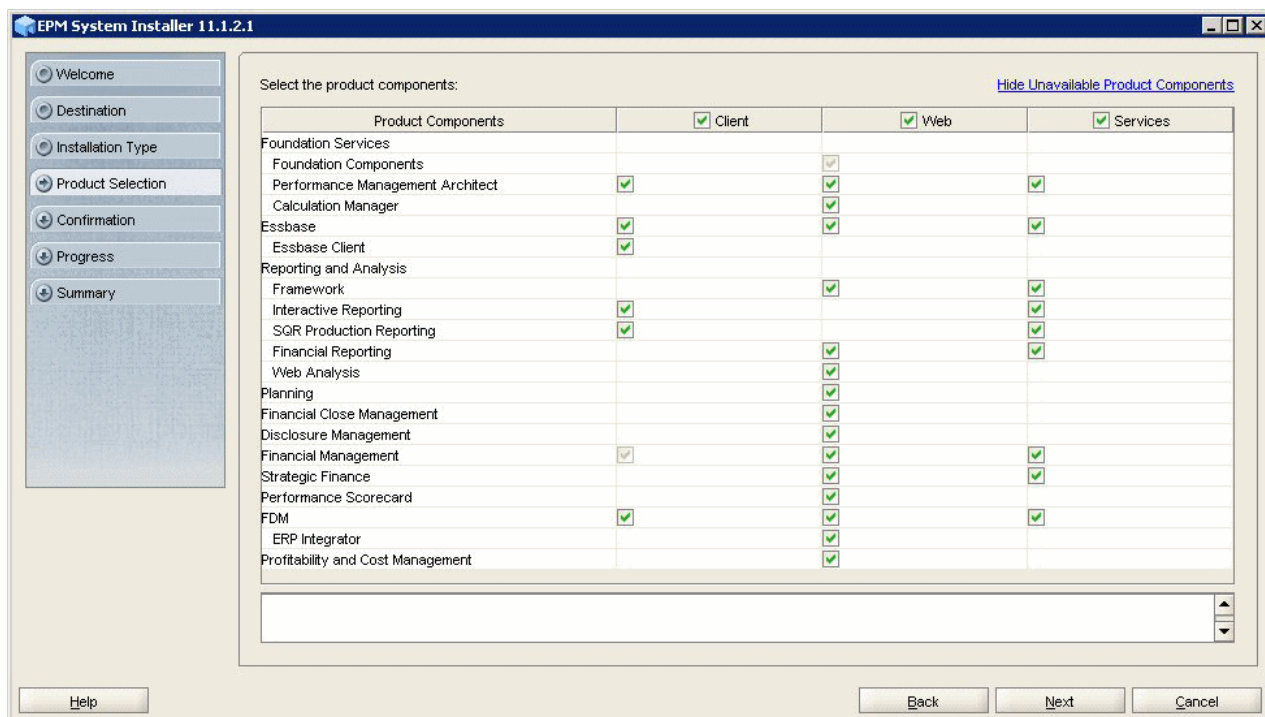
Product Selection

- If you selected **Choose Components By Tier**, select the tier or tiers, products, and components to install, and then click or select **Next**. If you selected **Choose Components Individually**, select the products and product components to install, and then click or select **Next**.

If you selected “Apply Maintenance Release” as the installation type, EPM System Installer applies the release to all installed 11.1.2.0 products. You cannot apply the maintenance release to only some products in your deployment. On the Product Selection page, you cannot make any selections or deselections.

For information about what is installed on each tier, see [“Component Installation By Tier and Installation Assemblies” on page 33](#).

Figure 1 Choose Components By Tier

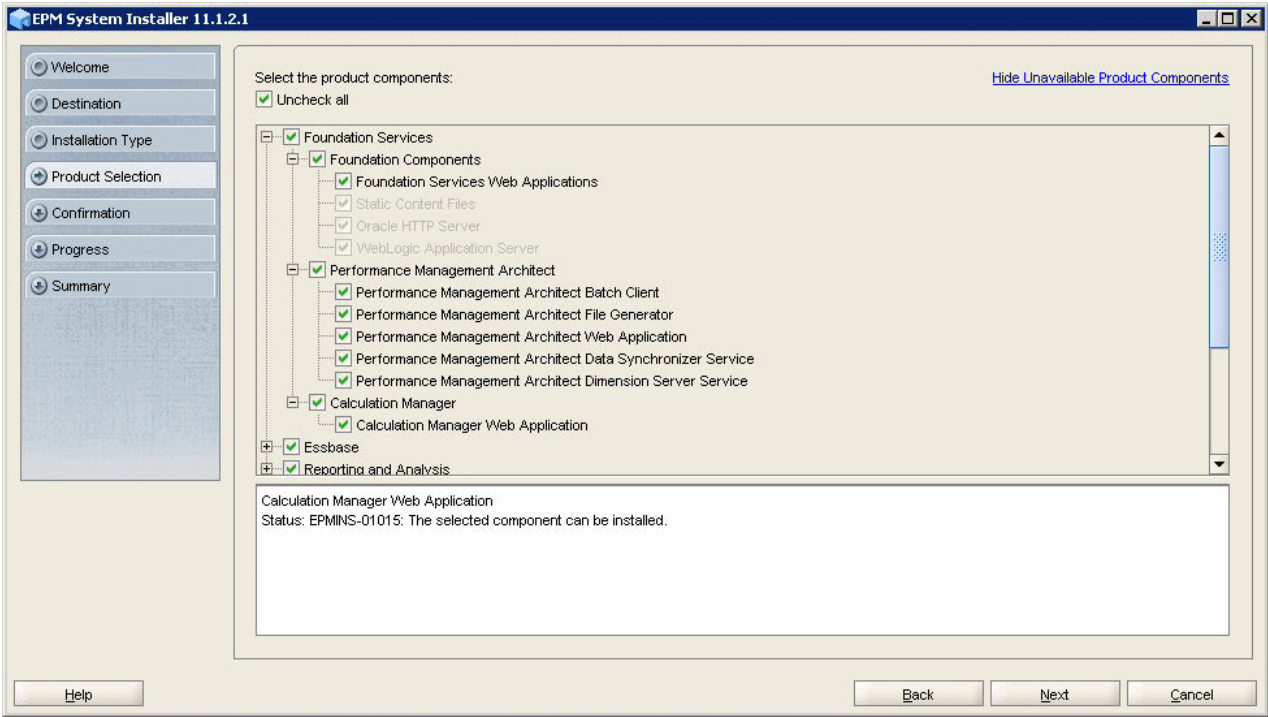


The following table describes the options if you select “Choose Components by Tier.”

Table 20 Choose Components By Tier Installation Options

Action	Details
To install by tier, select the deployment tier to install – Client, Web, or Services.	EPM System Installer automatically selects all product components available for installation on the selected tier. Components are available for installation if you downloaded the installation assemblies and extracted them to the proper /assemblies directory. EPM System Installer automatically selects any required components for the selected product.
Clear any products that you do not want to install for the selected tier.	You can choose to install all the products you want on a particular machine at one time. EPM System Installer installs them in the correct order. EPM System Installer prompts you if a dependent component must be selected. Note: A component with a version number or Re-install next to it indicates that it has already been installed. Select a different installation type to install the component (reinstall). Tip: Click a cell to see a description of your selection in the box at the bottom of the window.
Clear the deployment tiers that you do not want to install on this machine.	When you deselect a tier, EPM System Installer deselects all products and components for that tier.
Hide/Show unavailable products.	To see only products for which installation assemblies are available, select Hide Unavailable Products. To see all products, select Show Unavailable Products.

Figure 2 Choose Components Individually



The following table describes the options if you select “Choose Components Individually.”

Table 21 Choose Components Individually Installation Options

Action	Details
Select the products and product components to install.	You can expand and collapse the entries to select or clear specific options for each product and component.
Uncheck all / Check all	Select “Check all” to select all the products, or “Uncheck all” to clear all the products.
Hide/Show unavailable products.	To see only products for which installation assemblies are available, select Hide Unavailable Product Components . To see all products, select Show Unavailable Product Components .

Generally, you can install any combination of components on any computer. Note the following about product selection:

- Products are available for installation only if the assemblies are downloaded to the correct location and the selected component is supported on the platform on which you are installing. If a product is unavailable on the Product Selection page, ensure that the assemblies are in the correct location.

See [Chapter 2, “Preparing for Installation.”](#) For Troubleshooting tips, see *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*
- Select a product component to see information and status about it in the lower portion of the screen. If Microsoft Internet Information Server (IIS) is required for your installation, and it is not installed, a warning is noted in the lower portion of the screen, and you cannot

proceed until you install IIS. If you are installing on an unsupported platform, a warning is displayed.

- The Shared Services and EPM Workspace Web applications are installed when you install the Foundation Services Web applications.
- If you selected “New Installation,” and you have already installed this release of a product, the product is unavailable in the Product Selection page.
- In some cases, a component is selected, but is unavailable (you can't clear it), because it is required for another selected component.
- If you want to install Essbase in standalone mode (not using Foundation Services), you can skip the installation for Foundation Services Web applications. However, you must configure the Shared Services Registry database. To configure the Shared Services Registry database without installing Foundation Services, see [“Setting Up Essbase in Standalone Mode” on page 173](#).

Confirmation

- Review the summary of products to be installed. If necessary, click or select **Back** and make corrections. Click or select **Next** to begin the installation.

EPM System Installer warns you if there is insufficient disk space.

The **Install Type** column notes one of the following:

- **Install** if this is a new installation or if you have done a new installation as an upgrade.
- **Re-install** if this is a reinstallation of the same release of this EPM System product.
- “Maintenance” if this is a maintenance installation to move from EPM System products Release 11.1.2.0 to Release 11.1.2.1.

To save your installation selections to perform the same installation on another computer, or to use as the basis for a response file for silent installation, see [“Saving Installation Selections” on page 105](#).

Saving Installation Selections

If you plan to install this same set of components on another computer, you can save the installation selections in a file. You can then load the selections on another computer during installation to prepopulate EPM System Installer pages for **Destination** and **Product Selection**.

- To save the installation selections, click or select **Save**, browse to a location, specify a file name, and click or select **Save**.

This procedure creates an editable file that can be used as the basis for a response file for silent installation. For information about using a response file, see [“Loading Saved Selections” on page 107](#).

Progress

- To cancel the installation, click or select **Cancel**.

EPM System Installer starts to display the progress indicator after it has prepared the list of assemblies to install. This might take several minutes, depending on how many products you selected. EPM System Installer displays progress incrementally as each assembly's installation is complete.

When you click or select Cancel, EPM System Installer waits until the current assembly completes installing and then stops. It does not undo installations for assemblies that were already installed. Use EPM System Uninstaller to remove assemblies that were installed.

See [Chapter 11, “Uninstalling EPM System.”](#)

Note: “Creating Oracle Inventory” sets up infrastructure for future service fixes.

Summary

- Review the installation summary, and then click or select **Configure** to launch EPM System Configurator or click or select **Finish** to close EPM System Installer.

EPM System Installer indicates the success or failure of the installation. If any part of the installation failed, EPM System Installer notes which assembly failed to install. Check the log files for more information about the errors. You can find the log files in `EPM_ORACLE_HOME/diagnostics/logs/install`. There is a log file for each assembly, named *product-install.log*; for example, `hss-install.log`, and a log file for installation, `installTool-install-DateTime.log`.

For more information about configuring EPM System products, see [Chapter 4, “Configuring EPM System Products.”](#)

After you install and configure the products, start the services as described in [Chapter 8, “Starting and Stopping EPM System Products.”](#) You can then use EPM System Diagnostics to validate that the installation was successful and that the components are communicating. See [Chapter 9, “Validating the Installation and Verifying Deployment.”](#)

Performing Silent Installations

Silent installations automate the installation process so that you can install EPM System products on multiple computers without manually specifying installation settings on each machine.

To enable silent installation, record your installation settings in a response file. You can then run a silent installation from the command line, using the installation options that were saved in the response file.

➤ To record installation settings and run a silent installation:

1 Navigate to the directory that contains EPM System Installer.

2 From a command line, run a command:

```
installTool.cmd -record filename
```

for Windows or

```
installTool.sh -record filename
```

for UNIX,

where *filename* includes an absolute path or file name for the response file.

The file is saved in XML format, but you do not have to save the file with a `.xml` extension.

EPM System Installer launches.

3 Proceed through EPM System Installer, specifying the options that you want to record. For additional information about installation options, see [“Installing EPM System Products” on page 97](#).

Installation options are recorded in the response file. You can modify the response file later to change installation options.

You are now ready to run the installation in silent mode.

4 Copy the response file to the machine on which you want to run the installation. You can also copy the file to a network drive that is accessible from the machines on which you want to install.

5 From the command line, enter a command:

```
installtool.cmd -silent filename
```

for Windows or

```
installtool.sh -silent filename
```

for UNIX.

The installation runs in the background.

Upgrade Note!

Silent response files are not compatible between EPM System Release 11.1.1.x or Release 11.1.2.0 and Release 11.1.2.1. If you created silent response files for use with any earlier release of EPM System products, you must re-create them for use with EPM System Release 11.1.2.1.

Loading Saved Selections

You can also record installation settings from within EPM System Installer.

- To record installation settings, during installation, on the Installation Confirmation page, click or select **Save**, browse to a location, specify a file name, and click or select **Save**. The file is saved in the same format as for silent installations.
- To playback the installation using the same installation destination and product component selections, start EPM System Installer, and on the Destination page, click or select **Load**, browse to the saved selections file, and click or select **Open**.

Modifying Response Files

After you create a response file, you can modify it to customize the installation options for certain machines. For example, you might create a master silent file for all products, and then for each machine, change the location of the Middleware home and keep only the product components that you want to install on this machine.

- To modify a response file:
 - 1 Open the response file in any text editor. The file is in XML format.
 - 2 Edit the file using the following options.
 - `<HyperionHome>`—Location of the Middleware home.
 - `<SelectedProducts>`—Product components to install to specific tiers. Make changes in `<Product name>`, `<ProductComponent name>`, `<InstallTier>`, and `<Component>`.
 - `<Product name>`—The name of the product. Enclose product names in quotes, as they are XML attributes.
 - `<ProductComponent name>`—The component of the product. Enclose component names in quotes, because they are XML attributes.
 - `<InstallTier>`—The installation tier for the component installation (Client, Service, WebApplication).
 - `<Component>` — The services to install.
 - 3 Save the file in XML format.

Installing EPM System Clients

Subtopics

- [Installing Smart View](#)
- [Installing Spreadsheet Add-in](#)
- [Installing Financial Reporting Studio and Financial Reporting Print Server](#)
- [Installing Planning Offline Client](#)
- [Installing Strategic Finance Client](#)
- [Installing Disclosure Management Client](#)

Some EPM System clients are installed with EPM System Installer. However, the following client products have their own installers:

- Smart View
- Spreadsheet Add-in
- Financial Reporting Studio Client and Financial Reporting Print Server
- Planning Offline Client
- Strategic Finance Client
- Disclosure Management Client

For information about the files to download, see [Chapter 2, “Preparing for Installation.”](#)

Upgrade Note!

If you are upgrading from an earlier release of an EPM System client component, or applying the maintenance release to move from Release 11.1.2.0 to Release 11.1.2.1, you must uninstall the earlier release before you install the new release. No configuration is required.

Tip: If you are installing EPM System clients using Terminal services, switch your session to installation mode before you run any client installers (`change user /install`).

Installing Smart View

➤ To install Smart View:

- 1 Ensure that Microsoft Excel is installed with the Visual Basic Option.
- 2 Choose a method:
 - From eDelivery, download Smart View. If you are licensed to use Oracle Essbase Visual Explorer, the filename is `smartviewHVE.exe`. Otherwise, it is `smartview.exe`.
 - If you have installed and configured EPM Workspace, you can launch the Smart View installer from within EPM Workspace. Select **Tools**, then **Install**, and then **Smart View**.
- 3 Proceed through the installation wizard, and when installation is complete, click **Finish**. Smart View is displayed the next time you open a Microsoft Office application.

- 4 Visual Explorer licensees only:** To make Visual Explorer available to users, copy `smartviewHVE.exe` to the following location and rename it to `smartview.exe`:
- `EPM_ORACLE_HOME/common/epmstatic/wspace/SmartView`

Tip: Rename the existing `smartview.exe` file before performing this step.

Administrators can enable silent installations — installations that do not require settings to be specified each time — for Smart View. The silent installation command can be included in scripts to automate installation.

► To run silent installations:

- 1 Open a command line prompt.**
- 2 Navigate to the directory of the Smart View installer.**
- 3 Run one of the following commands:**
 - To install in the default directory, run `SmartView.exe /s /v"/qn URL=http://server:19000/workspace/SmartViewProviders"`
 - To install in another directory, run `SmartView.exe /s /v"/qn INSTALLDIR=targetPath",` for example, `SmartView.exe /s /v"/qn INSTALLDIR=D:\SmartView"`
 - To run silent installation and log the installation sequence, run `SmartView.exe /s /v" /qn /l*c log,` For example: `SmartView.exe /s /v" /qn /l*c C:\sv_silent_install.log"`

For Oracle Essbase Visual Explorer users, replace `SmartView.exe` with `SmartViewHVE.exe` in the command line.

Installing Spreadsheet Add-in

► To install Spreadsheet Add-in:

- 1 Ensure that Microsoft Excel is installed with the Visual Basic Option.**
- 2 Download the Spreadsheet Add-in ZIP file from the Oracle Software Delivery Cloud, unzip the file to a temporary location, and launch `Spreadsheet Add-in.exe`.**

If you are installing Spreadsheet Add-in using Remote Desktop, install using an admin console session. (Launch Remote Desktop using `mstsc /admin` or `mstsc /console`).

If you are using Spreadsheet Add-in as a Power User instead of as an Administrator, you must manually set `ESSBASEPATH`.

If the `EPM_ORACLE_HOME` environment variable is defined, Spreadsheet Add-in is installed in `EPM_ORACLE_HOME/products/Essbase/EssbaseClient` by default. If the `EPM_ORACLE_HOME` environment variable is not defined, Spreadsheet Add-in is installed in `EPM_ORACLE_HOME/products/ExcelAddin` by default.

The Spreadsheet Add-in installer creates a start menu item: **Oracle, Essbase, Essbase Client**.

➤ To run silent installations for Spreadsheet Add-in:

- 1 **Open a command line prompt.**
- 2 **Navigate to the directory of the Spreadsheet Add-in installer.**
- 3 **Run the following command:**

```
Spreadsheet Add-in.exe" /S /v"/qn INSTALLDIR=targetPath FOR_CURRENT_USER=user /l*v  
log"
```

where:

- *targetPath* — the installation directory. The default value is `c:\Oracle\Middleware\EPMSysstem11R1`. If the `EPM_ORACLE_HOME` environment variable is defined, this value is ignored.
- *user* — specify 1 to install Spreadsheet Add-in for all users or 2 to install Spreadsheet Add-in for the current user only. The default value is 1.
- *log* — the path for log files.

For example:

```
Spreadsheet Add-in.exe" /S /v"/qn INSTALLDIR=C:\Oracle\ FOR_CURRENT_USER=1  
/l*v C:\ESS_install.log"
```

Installing Financial Reporting Studio and Financial Reporting Print Server

Before you install Financial Reporting Studio and Financial Reporting Print Server, meet the following prerequisites:

- If you have an earlier release of Financial Reporting Studio, uninstall it.
 - If you have an earlier release of the Financial Reporting Print Server, stop and disable the Financial Reporting Print Server Windows service, and delete HRPrinter1-5 from Windows printers.
 - Ensure that a supported 32-bit version of Ghostscript is installed.
- To install Financial Reporting Studio and the Financial Reporting Print Server, choose one of the following methods:
- Download the Financial Reporting Studio installer from the EPM Workspace menu: From the Tools menu, select **Install** and then select **Financial Reporting Studio** and then launch the installer.
 - Download the Financial Reporting Studio ZIP file from the Oracle Software Delivery Cloud (FinancialReportingStudio-11121.zip), unzip the file to a temporary location, and launch FinancialReportingStudio.exe.

By default, Financial Reporting Studio is installed in `Program Files/Oracle/FinancialReportingStudio`. The Financial Reporting Studio installer installs all languages at once. The Financial Reporting Studio installer creates a start menu item: **Oracle, Financial Reporting Studio**.

After installing Financial Reporting Studio, configure the Financial Reporting Print Server. The Financial Reporting Application Server must be installed, configured, and running. See [“Configuring the Financial Reporting Print Server” on page 259](#)

Note: Installation of the Financial Reporting Data Provider is performed by the Smart View extensions automatic update feature. In the **Smart View** menu in Excel, in **Extensions**, select **Check for Updates** to download and deploy the extension.

Installing Planning Offline Client

► To install Planning Offline Client:

Choose a method:

- If you have installed and configured EPM Workspace, you can launch the Planning Offline Client installer from within EPM Workspace. Select **Tools**, then **Install**, and then **Planning Offline Client**.
- Download the Planning Offline Client file from the Oracle Software Delivery Cloud, unzip the file to a temporary location, and launch `OfflinePlanning.exe`.

To install silently, use the following command:

```
OfflinePlanning.exe /s /v"/qn INSTALLDIR=targetPath"
```

On the machine on which you install Planning Offline Client, you must also install Microsoft Excel and Smart View. The Planning Web application does not need to be installed on the same machine, but it must be running.

By default, Planning Offline Client is installed in `EPM_ORACLE_HOME/products/OfflinePlanning`. The Planning Offline Client installer installs all languages at once and uses the system locale for the language.

Installing Strategic Finance Client

► To install Strategic Finance Client:

Choose a method:

- If you have installed and configured EPM Workspace, you can launch the Strategic Finance Client installer from within EPM Workspace. Select **Tools**, then **Install**, and then **Strategic Finance Client**.
- Download the Strategic Finance Client file from the Oracle Software Delivery Cloud, unzip the file to a temporary location, and launch `HSFClient.exe`.

To install silently, use the following command:

```
HSFClient.exe /s /v"/qn INSTALLDIR=targetPath"
```

By default, Strategic Finance Client is installed in *EPM_ORACLE_HOME*/products/hsf. The Strategic Finance Client installer installs all languages at once and uses the system locale for the language. The Strategic Finance Client installer creates a start menu item: **Oracle, Strategic Finance**.

Installing Disclosure Management Client

Installation of the Disclosure Management Client is performed by the Smart View extensions automatic update feature. In the **Smart View** menu in Excel, in **Extensions**, select **Check for Updates** to download and deploy the extension.

If you have installed and configured EPM Workspace, you can launch the Taxonomy Designer installer from within EPM Workspace. Select **Tools**, then **Install**, and then **Taxonomy Designer**.

By default, Disclosure Management Client is installed in /Program Files/Oracle Hyperion Disclosure Management.

4

Configuring EPM System Products

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About EPM System Configurator

EPM System Configurator is installed with the first EPM System product installed on a computer and is used to configure all products installed on the computer. Use EPM System Configurator on each computer on which EPM System products are installed. (The Client tier does not require configuration.)

EPM System Configurator provides these tasks for configuration and reconfiguration of EPM System products. Not all tasks are required for all products.

- “Oracle Instance” — The location you specify for dynamic run-time files for EPM System products.
- “Configure Database” for Foundation Services — The database that you configure for Foundation Services, which holds the Shared Services Registry.
- “Configure Common Settings” — EPM System Configurator displays the Configure Common Settings page once on each machine that you configure.
- “Configure Oracle Configuration Manager” — A required task on the first machine in a deployment that you configure. EPM System Configurator uses the values that you enter during configuration on the first machine for all machines in the deployment.

- “Configure Logical Address for Web Applications” — optional. Use this option after first-time deployment if you need to change the logical address for a Web application. This task lets you change the logical address without redeploying the Web application.
- “Configure Web Server” — required. Configures the Web server for all EPM System Web applications.

If you have already configured the Web server and you configure any additional products, you must run EPM System Configurator again and select the Foundation Services “Configure Web Server” task. Then, restart the Web server and EPM Workspace.

- “Set Shared Services admin user password” — required. EPM System Configurator creates a preprovisioned user called `admin` that enables you to log on to Shared Services after configuration to create and provision users. EPM System Configurator requires you to specify a new admin password during configuration. You need not select this task. EPM System Configurator displays this page only once, on the first machine you configure.
- “Configure Database” for products — To store and retrieve data.
- “Deploy to Application Server” — To deploy the application to a Web application server.
- Product-specific configuration tasks for products that require it.
- Upgrade configuration tasks for products that require it, if you are upgrading from an earlier release.

Note: EPM System Configurator also performs pre-configuration tasks and registers products with Shared Services during configuration. You need not select these tasks; they are automatically performed when needed.

Use the configuration worksheets throughout this chapter to plan your configuration and to document the configuration steps for your company if required for disaster recovery.

About the Shared Services Registry

The Shared Services Registry is part of the database that you configure for Foundation Services. Created the first time that you configure EPM System products, the Shared Services Registry simplifies configuration by storing and reusing the following information for most EPM System products that you install:

- Initial configuration values such as database settings and deployment settings
- The computer names, ports, servers, and URLs you use to implement multiple, integrated, EPM System products and components
- Essbase failover content

Configuration changes that you make for one product are automatically applied to other products used in the deployment.

You can view and manage the contents of the Shared Services Registry using Lifecycle Management in the Oracle Hyperion Shared Services Console. See the *Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide*.

Configuration Prerequisites

Configuration prerequisite notes:

- On UNIX systems, ensure that `ulimit` is 4096. You can query for the current `ulimit` setting with the following command: `ulimit -n`.
- If you plan to deploy EPM System products in an SSL-enabled environment, review the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* before you configure. The SSL implementation that you choose affects the options that you select during configuration.
- Gather the information that you need to configure products. See “[Using EPM System Configurator](#)” on page 130.
- If you are using Financial Close Management, see “[Configuration Prerequisites for Financial Close Management](#)” on page 117.
- If you plan to integrate Oracle BI EE or BI Publisher with EPM Workspace, see “[Prerequisites for Integrating Oracle BI EE and BI Publisher Release 10.1.3.4.1+ with EPM Workspace Release 11.1.2.1](#)” on page 120.
- If you are using Profitability and Cost Management, and plan to use Oracle Web Services Manager to automate Profitability and Cost Management tasks, see “[Installing and Configuring the Repository Creation Utility](#)” on page 269.

Configuration Prerequisites for Financial Close Management

Subtopics

- [Installing Oracle SOA Suite](#)
- [Configuring and Starting Oracle SOA Suite](#)

Before you can configure Financial Close Management, you must install, configure, and start Oracle SOA Suite.

Installing Oracle SOA Suite

The following procedure provides an overview of the Oracle SOA Suite installation procedure. For more information about this procedure, see the *Oracle® Fusion Middleware Installation Guide for Oracle SOA Suite 11g Release 1* http://download.oracle.com/docs/cd/E15523_01/doc.1111/e13925/overview.htm#sthref12. This roadmap contains documentation links for the steps that follow.

► To install Oracle SOA Suite:

- 1 Ensure that you meet all the prerequisites and system requirements described in the *Oracle® Fusion Middleware Installation Guide for Oracle SOA Suite 11g Release 1*.

Note: Oracle SOA Suite requires WebLogic Server, which is installed with a default installation of EPM System.

- 2 Install and run the Repository Creation Utility (RCU) to create the required schemas for Oracle SOA Suite. Note the following details for this step:
 - Download the Repository Creation Utility from the “Oracle Enterprise Performance Management System” Media Pack on Oracle EDelivery and then install it.
 - To start RCU, from `rcuHome/bin`, run `./rcu` (UNIX) or `rcu.bat` (Windows).
 - You can ignore any messages about using a non-AL32UTF8 database.
 - On the **Database Connection Details** page, specify a user with DBA or SYSDBA privileges, such as `sys`.
 - On the **Select Components** page, make the following selections:
 - Expand **SOA and BPM Infrastructure** and select the following SOA infrastructure components: **SOA Infrastructure** and **User Messaging Service**. (You need not select **Business Activity Monitoring (BAM)**.)
 - Expand **AS Common Schemas** and select **Metadata Services** if it is not already selected.
 - For Identity Management, **OID** is selected by default. Do not select **Oracle Identity Federation**.

Make a note of the schema owner names for all the components because you need them to configure Oracle SOA Suite.

- On the Schema Passwords page, Oracle recommends that you select **Use same passwords for all schemas**. Make a note of this password.
- 3 Download Oracle SOA Suite from the “Oracle Enterprise Performance Management System” Media Pack on Oracle EDelivery, and then install it using the default options. If you have already installed EPM System products, install to the same Middleware home, for example: `Oracle/Middleware`.

During installation, use the JDK in the EPM System installation (`MIDDLEWARE_HOME/JDK160_21`).
 - 4 When the installation is complete, configure Oracle SOA Suite. See [“Configuring and Starting Oracle SOA Suite” on page 118](#).

Configuring and Starting Oracle SOA Suite

Ensure that you have installed Oracle SOA Suite as described in [“Installing Oracle SOA Suite” on page 117](#). Before you configure Financial Close Management, you must configure and start Oracle SOA Suite.

The following procedure provides an overview of the Oracle SOA Suite configuration procedure. For more information about this procedure, see the “Configuring Oracle SOA Suite” chapter of the *Oracle® Fusion Middleware Installation Guide for Oracle SOA Suite 11g Release 1* http://download.oracle.com/docs/cd/E15523_01/doc.1111/e13925/configure.htm#CACEEJJJ.

► To configure Oracle SOA Suite:

- 1 **From the WebLogic Administration Server machine, run the Oracle Fusion Middleware Configuration Wizard to configure a WebLogic domain, and choose the products that you want to configure in that domain. To start the Configuration Wizard, from `SOA_ORACLE_HOME/common/bin`, run `config.sh` (UNIX) or `config.cmd` (Windows).**

Note that EPM System and Oracle SOA Suite must be deployed to the same domain. The choice you make for the domain depends on your deployment scenario:

- In a new deployment, where you have not yet configured EPM System products, you must create a new WebLogic domain.
- In an existing deployment, where you have already configured EPM System products and now want to extend the deployment to include Financial Close Management and Oracle SOA Suite, you must extend the existing WebLogic domain created during EPM System deployment.

Note the following additional details for this step. Note that not all steps are listed, only those that require specific selections for Financial Close Management.

- During deployment, select the following products: Oracle SOA Suite and all common Oracle components, including Oracle Enterprise Manager, Oracle WSM Policy Manager, Oracle JRF WebServices Asynchronous services, and Oracle JRF, if they are not already selected.
 - Select the default JDK. Oracle recommends that you select Production Mode. (When using Production Mode, when you start WebLogic Administration Server, when you are prompted to enter a user name and password, enter the user name and password that you entered during the configuration of the Administration Server domain.)
 - When you configure the JDBC datasources, enter the database details that you entered when you ran RCU.
 - Use the default settings for the server port. By default, the Administration Server port is 7001 and the `soa_server1` port is 8001.
- 2 **Start WebLogic Administration Server and the Oracle SOA Suite managed servers using the WebLogic Administration Console.**
 - To start the WebLogic Administration Server, run the following command:
`MIDDLEWARE_HOME/user_projects/domains/domainName/startWebLogic.cmd`
 - To start the SOA Managed Server, run the following command: `MIDDLEWARE_HOME/user_projects/domains/domainName/bin/startManagedWebLogic.cmd soa_server1`.

The Oracle SOA Server must be running before you can configure Financial Close Management.

Tip: SOA setup usually runs on two servers - an Admin Server running on port 7001, which hosts the Enterprise Management application, and a managed server running on port 8001, which hosts the SOA infrastructure. Log in to `http://host:7001/em` with your domain user name and password and check the status of both servers.

3 Apply the following patches for Oracle Fusion Middleware, available on My Oracle Support:

- 11063511 - SPORADIC MISSING OF SUBJECT IN BUSINESS EVENT HEADER
- 11864201 - PSE FOR MLR BUG 11864201 ON TOP OF 11.1.1.4.0 (PSE #536496)

Shut down the Financial Close Management managed server, the SOA Server, and all managed servers before you apply a patch. Review the patch Readmes for information on how to apply a patch.

For patch 11063511, set the `ORACLE_HOME` environment variable to `../Oracle/Middleware/Oracle_SOA1`.

For patch 11864201, set the `ORACLE_HOME` environment variable to `MIDDLEWARE_HOME/oracle_common`.

Apply the patches on each machine on which SOA is installed.

Next, configure EPM System products according to the configuration sequence noted in “Financial Close Management Installation and Configuration Prerequisites and Roadmap” on page 86. Then, perform manual postconfiguration tasks. See Chapter 7, “Performing Postconfiguration Tasks.” In particular, you must complete the Financial Close Management postconfiguration tasks. See “Financial Close Management Postconfiguration Tasks” on page 272.

Prerequisites for Integrating Oracle BI EE and BI Publisher Release 10.1.3.4.1+ with EPM Workspace Release 11.1.2.1

Before you can integrate Oracle BI EE and BI Publisher Release 10.1.3.4.1+ with EPM Workspace Release 11.1.2.1, you must install and configure Shared Services Release 11.1.1.3 on a machine other than the machine used for EPM System Release 11.1.2.1. Then, perform the following steps:

- Before you can integrate BI Publisher Release 10.1.3.4.1+ with EPM Workspace 11.1.2.1, you must complete the prerequisite steps described in the *Oracle Business Intelligence Publisher Administrator's and Developer's Guide Release 10.1.3.4.1*, available at http://download.oracle.com/docs/cd/E10415_01/doc/index.htm. Note the following caveats:
 - In the section “Configuring Oracle BI Publisher with EPM Workspace,” the step “Configure the EPM Workspace Web server” is not required because Web Server is configured during configuration of EPM System Release 11.1.2.1.

- All references to the Registry Properties file (`reg.properties`) in the “Prerequisites for Integration with EPM Workspace” refer to the Registry Properties file (`reg.properties`) that was created during the installation and configuration of Shared Services Release 11.1.1.3.
- Before you can integrate Oracle BI EE Release 10.1.3.4.1+ with EPM Workspace 11.1.2.1, you must complete the prerequisite steps described in the *Oracle Business Intelligence Publisher New Features Guide* Release 10.1.3.4.1+, available at http://download.oracle.com/docs/cd/E10415_01/doc/index.htm. Note the following caveats:
 - In the section “Installing and Configuring Oracle BI Presentation Services with EPM Workspace,” the steps “Configuring the Web Server for EPM Workspace” and “Verifying the Web Server Configuration” are not carried out using EPM Workspace Release 11.1.1.3 but on EPM System Release 11.1.2.1.
 - All references in the document to the Registry Properties file (`reg.properties`) refer to the Registry Properties file (`reg.properties`) that is created during the installation and configuration of Shared Services Release 11.1.1.3.

Next, proceed with configuration of EPM System Release 11.1.2.1 using EPM System Configurator, selecting the task “Set up Connection to Oracle BI EE and Publisher.” Configure the Web server last.

In this scenario, you must have an installation of Shared Services Release 11.1.1.3 along with the installation of EPM System Release 11.1.2.1.

Caveats for working in this environment:

- Native users are not supported.
- You must install and configure EPM System Release 11.1.2.1 and EPM System Release 11.1.1.3 on different servers. Configuration on a single server is not supported.

Configuration Sequence

In general, for a new installation, Oracle recommends that for each machine, you configure all EPM System products at the same time for the products installed on the machine. By default, EPM System Configurator preselects all products for you. Foundation Services must be installed and configured for other products to configure successfully. The configuration sequence for various deployment scenarios is described in the following sections.

Configuration sequence notes:

- If you are configuring Financial Close Management, there is a required configuration sequence. See “[Financial Close Management Installation and Configuration Prerequisites and Roadmap](#)” on page 86.
- By default, EPM System Configurator uses the same database for all products that you configure at one time. To use a different database for each product, perform the “Configure Database” task separately for each product. In some cases you might want to configure separate databases for products. Configure the Web server last.

- You must perform the “Configure Database” task at the same time as or before you perform the “Deploy to Application Server” task.
- If you have already configured the Web server, and you configure any additional products, you must run EPM System Configurator again and select the Foundation Services “Configure Web Server” task. Then, restart the Web server and EPM Workspace.
- Automatic Web server configuration with EPM System Configurator is supported only for the Oracle HTTP Server installed by EPM System Installer or IIS.

Configure the following products after you have completed all the configuration tasks using EPM System Configurator:

- Data Relationship Management. See the *Oracle Hyperion Data Relationship Management Installation Guide*.
- FDM. The tasks in EPM System Configurator register the FDM Web server in the Shared Services Registry. The remainder of the configuration is done in FDM. See the *Oracle Hyperion Financial Data Quality Management Configuration Guide*.

Note: If you want to install Essbase in standalone mode (not using Foundation Services), you can skip the installation for Foundation Services Web applications. However, you must still configure the Shared Services Registry. To configure the Shared Services Registry without installing Foundation Services, you run EPM System Configurator from the command line using the `-forceRegistry` option. See [“Setting Up Essbase in Standalone Mode” on page 173](#).

Configuration Sequence in a Single-Machine Environment

Oracle recommends that for each machine, you configure all EPM System products at the same time for the products installed on the machine. If you are configuring multiple products on a machine at the same time, EPM System Configurator configures them in the correct order. Foundation Services must be installed and configured for other products to configure successfully.

Configuration sequence notes:

- By default, EPM System Configurator uses the same database for all products that you configure at one time. To use a different database for each product, perform the “Configure Database” task separately for each product. In some cases you might want to configure separate databases for products. In this case, configure Foundation Services first and configure the Web server last.
- If you have already configured the Web server, and you configure any additional products, you must run EPM System Configurator again and select the Foundation Services “Configure Web Server” task. Then, restart the Web server and EPM Workspace.
- Typically, if you are installing all products on a single machine, for the first product you configure, you create a new EPM Oracle instance. For each product after that, you modify the existing instance.

- If you are configuring Financial Close Management, there is a required configuration sequence. See [“Financial Close Management Installation and Configuration Prerequisites and Roadmap”](#) on page 86.

After you have completed configuration, perform the postconfiguration tasks required for your product. See [Chapter 7, “Performing Postconfiguration Tasks.”](#)

Configuration Sequence in a Distributed Environment

Configuration in a distributed environment notes:

- Configure Foundation Services first. Foundation Services must be installed and configured for other products to configure successfully. To configure Foundation Services, select the Foundation tasks on the Task Selection page of EPM System Configurator: “Configure Common Settings,” “Configure Database,” “Configure Oracle Configuration Manager,” and “Deploy to Application Server.” Then, for each machine in the deployment, configure all EPM System products at one time for the products installed on the machine.
- Configure the Web server last. (Select the Foundation Services “Configure Web Server” task.) Then, restart the Web server and EPM Workspace.

Tip: If you are configuring one product at a time and want to validate each product as you go, configure the Web server after you configure each product. Then, restart the Web server and EPM Workspace.

- Complete the configuration on each machine and close EPM System Configurator before launching EPM System Configurator on another machine.
- When you configure in a distributed environment, you must configure the Shared Services database on every machine. On the first machine, you are setting up the Shared Services Registry. For configurations on subsequent machines, choose “Connect to a previously configured Shared Services database.” In this case, you are letting the machine know the location of the Shared Services Registry.
- When you configure in a distributed environment, provide a new, unique instance name as you configure each server. For example, if you are using the default instance name `epmsystem1` on the first server, and you keep the same naming convention on subsequent servers, you would create new, unique instance names on each subsequent server, such as `epmsystem2`, `epmsystem3`, and so on.
- Create a new EPM Oracle instance on each machine.
- Oracle HTTP Server is installed with Foundation Services. It is also installed on the Essbase Server machine. In a distributed environment, configure only one instance of Oracle HTTP Server. However, if you are using more than one Web server in a deployment for load balancing and failover, configure the Web server on every machine on which you want to run the Web server.
- If you have already configured the Web server, and you configure any additional products, you must run EPM System Configurator again and select the Foundation Services “Configure Web Server” task. Then, restart the Web server and EPM Workspace.

- Deploy all EPM System products to a single domain. The only exception to this requirement is documented in [“Deploying Financial Reporting and Web Analysis on Windows for use with Financial Management” on page 246.](#)
- If you want to cluster Web applications for load balancing, see [“Clustering Web Applications” on page 125.](#)
- For information on configuring Reporting and Analysis in a distributed environment, see “Chapter 6, Reporting and Analysis Services Clustering.” in the *Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide*.

After you have completed configuration, perform the postconfiguration tasks required for your product. See [Chapter 7, “Performing Postconfiguration Tasks.”](#)

See the following sections for information about EPM System clustering you can perform during configuration with EPM System Configurator. For other types of clustering, see the *Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide*. See the *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for sample deployment diagrams to help plan your deployment.

Maintenance Release Configuration Sequence

When you are applying the maintenance release to move from Release 11.1.2.0 to Release 11.1.2.1, when you launch EPM System Configurator, note the following:

- On the Task Selection page, all required configuration tasks are preselected.
- You must complete all Pending tasks in EPM System Configurator.

Upgrade Configuration Sequence

Upgrade Note!

See [“Upgrading Checklist” on page 177](#) for details about the configuration sequence when you are upgrading from an earlier release of EPM System products.

For more information about configuration when you are upgrading, see [“Configuring EPM System Products in an Upgrade” on page 197.](#)

About Clustering

Subtopics

- [Clustering Web Applications](#)
- [Clustering Essbase Server](#)
- [Clustering Financial Management Servers](#)
- [Load Balancing Financial Management or FDM Web Applications on IIS](#)

Clustering Web Applications

You can cluster EPM System Web applications during configuration with EPM System Configurator. Use the following general configuration sequence. This procedure assumes that the Oracle HTTP Server installed by EPM System Installer is the logical host.

Before you cluster Web applications, ensure that you meet the installation prerequisites for installing in a distributed environment. See [“Installing EPM System Products in a Distributed Environment” on page 94](#).

➤ To cluster EPM System Web applications during configuration with EPM System Configurator:

- 1 Install EPM System Web applications on each machine in your environment.
- 2 Configure the Web application on the first machine, selecting “Deploy to Application Server” on the EPM System Configurator Task Selection page.

During deployment, EPM System Configurator creates a cluster for each managed server in WebLogic.

- 3 Configure the Web application on the next machine, selecting “Deploy to Application Server” on the EPM System Configurator Task Selection page. On the Application Server deployment page, click Setup, and then enter details on the Advanced Setup page. See [“Advanced Setup” on page 140](#).

During deployment, EPM System Configurator adds the server to the cluster in WebLogic.

Repeat this step for any additional machines in the deployment.

- 4 Configure the Web server last, selecting “Configure Web Server” from the Foundation tasks on the EPM System Configurator Task Selection page. Then, restart the Web server and EPM Workspace.

Considerations about clustering Web applications:

- EPM System Configurator configures a cluster for each managed server.
- You should have only one cluster for each EPM System product. Note that EPM System Configurator creates a cluster for each managed server.
- For clustering Financial Management servers, see [“Clustering Financial Management Servers” on page 126](#).

If you are manually deploying Web applications, see [“\(Optional\) Clustering Web Applications in a Manual Deployment” on page 244](#) for information on clustering with WebLogic Server.

Clustering Essbase Server

Using EPM System Configurator, you can cluster Essbase Server to provide active-passive failover with write-back capability. Active-passive Essbase failover clusters use the service failover functionality of the Oracle Process Manager and Notification (OPMN) Server.

For this release, an active-passive Essbase cluster can contain only two Essbase servers. OPMN stops, starts, and monitors the agent process.

Active-passive Essbase clusters do not support load balancing.

To configure an active-passive Essbase cluster, during configuration with EPM System Configurator, on the Essbase Server Configuration page, click or select **Set up Cluster** and enter the cluster details. See [“Setting Up Essbase Clusters” on page 155](#).

As an alternative to active-passive failover, for information about active-active clustering using Provider Services, see “Essbase Clustering and Failover” in the *Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide*. You can implement active-passive failover using EPM System Configurator, or active-active failover using Provider Services, but not both.

Clustering Financial Management Servers

The following procedure is an overview of the recommended process for adding servers to the Financial Management environment, defining clusters, and adding servers to the clusters.

Note: EPM System Configurator does not dynamically resolve the list of newly registered Financial Management servers clusters. You must restart EPM System Configurator before registering remote servers/clusters.

➤ To cluster servers in your Financial Management environment:

- 1 After you install Financial Management on a new server or servers, run EPM System Configurator on all new servers and select the “Configure Application Server” task.
- 2 Run EPM System Configurator on any one application server and select the “Configure Application Cluster” task to define clusters and to add servers to or remove servers from clusters.
- 3 Run EPM System Configurator on any application or Web server and select the “Register Application Servers/Cluster” task.
- 4 Restart the Foundation Services Web application and the Web server.
- 5 In EPM Workspace, register each application against the preferred cluster. See the *Oracle Hyperion Financial Management Administrator's Guide*.

Load Balancing Financial Management or FDM Web Applications on IIS

You can configure Oracle HTTP Server to provide load balancing support to two or more Financial Management or FDM Web applications. You set up a load balancer in front of the Web server using EPM System Configurator.

- To set up Oracle HTTP Server as a load balancer for Financial Management or FDM Web applications:
 - 1 Install EPM System products including Financial Management or FDM Web applications on two or more machines.
 - 2 Configure EPM System products using EPM System Configurator using the sequence described in [“Configuration Sequence in a Distributed Environment” on page 123](#).
 - 3 Configure Financial Management and FDM on each machine in the environment.
 - 4 On one machine, select **Update Logical Addresses for Web Applications** from the Foundation tasks and for **Host**, enter the URL of the load balancer or Oracle HTTP Server.

You need to perform this task on only one machine in the environment.
 - 5 Configure the Web server last. (Select **Configure Web Server** from the Foundation tasks.) Then, restart the Web server and EPM Workspace.

Configuring Products in an SSL-Enabled Environment

If you are configuring EPM System products for SSL, the configuration sequence and selections that you make during configuration depend on the type of SSL implementation you choose. See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* for more information. EPM System supports the following types of SSL configuration:

- Full SSL Deployment (including data access)
- SSL Terminating at the Web Server
- SSL Accelerators (Off-loading)
- Two-way SSL

Note: Essbase supports only one-way SSL using self-signed certificates by default. Using default certificates is recommended for use only in a test environment. Oracle recommends that you use certificates from well-known third party CAs in a production environment. See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* for details.

Configuring Products for Manual Deployment

If you plan to manually deploy EPM System Web applications, launch EPM System Configurator with the `/configtool-manual.bat | .sh` command. Perform required configuration tasks

except for the “Deploy to Application Server” task and the “Configure Web Server” task. Then, perform the steps outlined in [Chapter 6, “Manually Deploying EPM System Web Applications.”](#)

Product Configuration Task Summary

The following tables summarize the configuration tasks for each product. All products are automatically registered with Shared Services during configuration. EPM System Configurator displays the “Configure Common Settings” page once on each machine that you configure. EPM System Configurator displays the “Configure Oracle Configuration Manager” page on the first machine that you configure.

Clients do not require configuration and are not included in these tables.

The following table summarizes the configuration options available for Foundation Services products.

Table 22 Foundation Services Configuration Task Summary

	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks	Post-configuration Tasks
Foundation Services	X	X This selection deploys Shared Services and the EPM Workspace Web applications.	● Configure Common Settings ● Configure Logical Address for Web Applications (Optional) ● Configure Oracle Configuration Manager ● Set up Connection to Oracle BI and Publisher (Optional) ● Configure Web Server ● (Upgrades only) Import data from earlier release	X
Performance Management Architect	X (Windows only)	X	X (Optional) Configure Interface Datasource (Windows only)	X
Calculation Manager	X	X		

The following table summarizes the configuration options available for Essbase products.

Table 23 Essbase Configuration Task Summary

	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks	Post-configuration Tasks
Essbase			X Configure Essbase Server	X
Administration Services	X	X	X (Upgrades only) Import data from earlier release	X

	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks	Post-configuration Tasks
Provider Services		X	X (Upgrades only) Import data from earlier release	
Essbase Studio	X (Required for Essbase Studio catalog)		X Configure Essbase Studio Data File Location	X
Integration Services			X Configure Essbase Integration Services	X

The following table summarizes the configuration options available for Reporting and Analysis products.

Table 24 Reporting and Analysis Configuration Task Summary

	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks	Post-configuration Tasks
Reporting and Analysis	X	X	X Configure Reporting and Analysis Services	X

The following table summarizes the configuration options available for Financial Performance Management Applications products.

Table 25 Financial Performance Management Applications Product Configuration Task Summary

	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks	Post-configuration Tasks
Financial Management (All configuration tasks are Windows only)	X	X Note: You need to select this task only if you are using Financial Management with Financial Close Management.	X - Configure DCOM - Configure Application Server - Configure Application Cluster - Register Application Servers/Cluster - Configure Web Server (Upgrades only) Upgrade applications from earlier release	X
Performance Scorecard	X	X	X Configure Attachment Files Location	X
Planning	X	X		X
Profitability and Cost Management	X	X		X

	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks	Post-configuration Tasks
Strategic Finance (All configuration tasks are Windows only)			X - Configure Data Folder - WebServices Configuration	X
Disclosure Management	X	X		
Financial Close Management	X	X	X - Deploy to SOA - Configure Content Management System Location (Optional)	X

The following table summarizes the configuration options available for Data Management products.

Table 26 Data Management Product Configuration Task Summary

	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks	Post-configuration Tasks
FDM (All configuration tasks are Windows only)	X (For ERP Integrator)	X (For ERP Integrator)	X - Configure FDM Web Application - Configure FDM Server	X
Data Relationship Management				X

Using EPM System Configurator

Run EPM System Configurator on each computer hosting the products to configure or reconfigure.

For a list of characters supported during configuration with EPM System Configurator, see [“Characters Supported for Installation and Configuration” on page 96](#).

Note: On Windows machines, do not use the Administrator user to install and configure. Run EPM System Installer and EPM System Configurator as a user with administrator rights. Install and configure as the same user for all EPM System products. If you are using Windows 2008, install with UAC disabled. UAC must be disabled to install, configure, and run EPM System products. UAC can be enabled on end-user client desktops.

Note: On UNIX machines, do not use the `root` user to install and configure. Install and configure as the same user for all EPM System products. On UNIX machines, for all Oracle products, the user that is installing must be part of the same group; the group must have write permission to the central inventory (`oraInventory`).

Note: When you upgrade or apply the maintenance release, install and configure using the same user that was used to install and configure the earlier release.

➤ To configure EPM System products:

1 Choose a method to launch EPM System Configurator:

- On the last page of EPM System Installer, click or select **Configure**.
- From the **Start** menu, select **Programs**, then **Oracle EPM System**, then **Foundation Services**, and then **EPM System Configurator**.
- Change to `EPM_ORACLE_HOME/common/config/version_number` and then launch `configtool.bat (.sh)`.
- To run EPM System Configurator in console mode, launch it from the command line using the `-console` parameter. For example `EPM_ORACLE_HOME/common/config/version_number/startconfigtool.bat -console`.
- For silent configurations, see [“Performing Silent Configurations” on page 171](#).
- If you are manually deploying Web applications, launch EPM System Configurator from the command line using `EPM_ORACLE_HOME/common/config/version_number/configtool-manual.bat (.sh)`. See [Chapter 6, “Manually Deploying EPM System Web Applications”](#) for more information.

EPM System Configurator performs initial checks. Review the status of these checks in the console window. EPM System Configurator checks whether:

- Environment variables are set
- `.oracle.products` is present
- All required `.jars` are present
- Windows `system32` is in the `PATH`
- Oracle HTTP Server installation was successful
- There is a valid EPM Oracle home

2 Review and complete each page of EPM System Configurator, clicking or selecting **Next to move to the next page.**

In console mode, enter the number beside the selection you want.

The following table provides links where you can find more details about each page of EPM System Configurator.

Page	Reference
Configure Instance	“Configure a New or Existing EPM Oracle Instance ” on page 133
Task selection	“Task Selection” on page 134
Set Up Shared Services and Registry Database Connection	Ensure that the database is started and that you have created a database as described in “Preparing a Database” in <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i> . Enter the information as described in “Set Up Shared Services and Registry Database Connection” on page 143 .
Configure database	Ensure that the database is started and that you have created a database as described in “Preparing a Database” in <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i> . Enter the information as described in “Configure Database” on page 135 .
Application server deployment	Enter the information as described in “Deploy to Application Server: Oracle WebLogic” on page 139 .
Product-specific configuration tasks	For detailed procedures to configure each product, see the sections: ● “Foundation-Specific Configuration Tasks” on page 142 ● “Performance Management Architect-Specific Tasks (Optional)” on page 149 ● “Essbase-Specific Tasks” on page 152 ● “Reporting and Analysis-Specific Tasks” on page 159 ● “Financial Management-Specific Tasks” on page 160 ● “Performance Scorecard — Configure Attachment Files Location” on page 169 ● “Strategic Finance-Specific Tasks” on page 169 ● “Financial Close Management-Specific Tasks” on page 170 ● “FDM-Specific Configuration Tasks” on page 171

- 3 (Optional) To save the configuration selections in a response file for silent configuration, click or select **Save**, browse to a location, specify a file name, and click or select **Save**.**

This procedure creates an editable file that can be used as a response file for silent configuration. See [“Performing Silent Configurations” on page 171](#).

- 4 Confirm the configuration tasks to complete, and then click or select **Next**.**

EPM System Configurator displays the status of the configuration process.

Configuration time depends on the products and tasks that you selected. Progress is recorded in `EPM_ORACLE_INSTANCE/diagnostics/logs/config/configtool.log`.

When configuration finishes, the status of each task is displayed. Configuration results are noted in `EPM_ORACLE_INSTANCE/diagnostics/logs/config/configtool_summary.log`.

- 5 Click or select **Task Panel** to return to the Task Selection page to complete additional configuration tasks.**
- 6 Click or select **Finish**.**

If configuration is successful, perform postconfiguration tasks, start services, and validate service startup.

See [Chapter 7, “Performing Postconfiguration Tasks,”](#) [Chapter 8, “Starting and Stopping EPM System Products”](#) and [Chapter 9, “Validating the Installation and Verifying Deployment.”](#)

Terminating configuration for a particular product does not terminate the entire process. Configuration continues for the other products. EPM System Configurator displays error messages on a summary page after the configuration process completes.

If errors are displayed, perform these tasks:

- Review the log files.
- See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide* for information about resolving configuration issues.
- If you see errors related to the Oracle HTTP Server installation, ensure that you have met the Oracle HTTP Server installation prerequisites. See [“Oracle HTTP Server Installation Prerequisites” on page 84](#). For more tips on troubleshooting the Oracle HTTP Server installation, see the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.
- If Oracle Configuration Manager is not available during configuration, EPM System Configurator shows that the “Configure Oracle Configuration Manager” task failed. When the Oracle Configuration Manager is available, restart EPM System Configurator and select the “Configure Oracle Configuration Manager” task.

Configure a New or Existing EPM Oracle Instance

- Specify a new or an existing EPM Oracle instance for the deployment.

EPM System Configurator deploys dynamic components of EPM System products (components that can change during run-time) in the EPM Oracle instance directory. The default EPM Oracle instance location is `MIDDLEWARE_HOME/user_projects/epmsystem1`.

Typically, if you are installing all products on a single machine, for the first product you configure, create a new instance. For each product after that, modify the existing instance.

If you are installing in a distributed environment, create a new instance with a unique name on each machine.

The following table describes options for Instance configuration.

EPM System Configurator	Description	Your Information
Modify an existing EPM Oracle instance/Create a new EPM Oracle instance	You can modify an existing EPM Oracle instance or create a new instance. See “About Middleware Home, EPM Oracle Home, and EPM Oracle Instance” on page 17 for more information about instances.	
Home directory for EPM Oracle instances	Specify the directory in which to create the instance. The default EPM Oracle instance location is <i>MIDDLEWARE_HOME/user_projects</i> .	
EPM Oracle Instance name	Specify a name for the instance. The default instance name is <i>epmsystem1</i> .	

Task Selection

- Select the products and tasks to configure for this machine, or click or select **Next** to select all the required tasks.

Task selection notes:

- In a new installation, all required tasks are selected by default.
- You can clear tasks that you want to perform later.
- Select “Check All” or “Uncheck All” to select or clear all tasks.
- You cannot clear mandatory tasks, which are selected by default. If the task is unavailable (grey) and selected (checked), the task is performed and you cannot clear it.
- If you are applying the maintenance release, required configuration tasks are preselected. For products that require the Configure Database task, select “Connect to a previously configured database.”
- EPM System Configurator automatically performs common tasks the first time you configure any component of a product, such as Shared Services registration. EPM System Configurator uses the Shared Services Registry to locate Shared Services.
- The EPM Workspace Web application and the Shared Services Web application are deployed when you select the Hyperion Foundation Deploy to Application Server task.

For ease of deployment and simplicity, you can use one database for all products, which is the default when you configure all products at the same time.

Caution! To use a different database for each product, perform the “Configure Database” task separately for each product. In some cases, you might want to configure separate databases for products. Consider performance, roll-back procedures for a single application or product, and disaster recovery plans.

Configure Database

- Specify the database settings to use for the products that you selected on the Task Selection page.

For ease of deployment and simplicity, for a new installation, you can use one database for all products, which is the default when you configure all products at the same time. To use a different database for each product, perform the “Configure Database” task separately for each product. In some cases, you might want to configure separate databases for products. Consider performance, roll-back procedures for a single application or product, and disaster recovery plans. See *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.

Database configuration notes:

- Ensure that the database is set up as described in “Preparing a Database” in *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.
- When you initially configure, a default database name is displayed. Change the defaults to match the name of the database and user that you already created.
- A database type might not be available if one of the selected products doesn’t support it. In this case, configure this product separately. See the *Oracle Hyperion Enterprise Performance Management System Certification Matrix* (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html) for a list of supported databases for each product.
- During Performance Management Architect database configuration, EPM System Configurator checks that Oracle Database client is installed.
- If you are configuring an Oracle database, EPM System Configurator checks that the database was created with the correct character set. If not, you are prompted to correct it. See the *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for character set requirements.
- The schemas for the EPM System databases are documented and are available in a ZIP file (*EPM Data Models Release 11.1.2.1*) posted on the EPM Whitepaper library: [Oracle Enterprise Performance Management / Business Intelligence White papers](http://www.oracle.com/technetwork/middleware/bi-foundation/resource-library-090986.html). (<http://www.oracle.com/technetwork/middleware/bi-foundation/resource-library-090986.html>).

Upgrade Note!

Note the following about database configuration if you are upgrading:

- Select “Upgrade database to the current release from...” and select the release number.
- When you run the Configure Database task for Performance Management Architect, it may take a long time to complete. Do not interrupt this task while it is running.

The following table describes options for database configuration.

EPM System Configurator Fields	Description	Your Information
Configure database	Confirm the list of products for which you want to configure the database. The list displayed depends on the products that you initially selected to configure. To create different databases for each product, select only one product at a time and run EPM System Configurator again to configure the database for another product.	
Connect to a previously configured database/ Perform first-time configuration of database/Upgrade existing database to the current release from...	Select whether to connect to a previously configured database, or to configure a new database. Upgrade Note! If you are upgrading from an earlier release, select “Upgrade existing database to the current release from...” and then select the release. Note: This task assumes that you have created the database. If you have not created a database, see “Preparing a Database” in <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i>.	
Database Type	Select the database type.	
Server	Specify the name of the computer or server hosting the database. For Oracle RAC, specify the VIP name or one of the node names as the server name.	
Port	Select the default or specify a custom server port number on which the database listens.	
Service Name or SID, or Database Name	Specify the name of the database. If you are using an Oracle RAC database, specify the RAC service name. For Financial Management with Oracle Database, you can use TNS identifier in <code>tnsnames.ora</code> instead of SID or Service Name. Note that all values in <code>tnsnames.ora</code> are case sensitive.	
User Name	Enter the database user name.	
Password	Enter the database user password. Note: If the password changes, reconfigure as described in “Changing Repository Passwords and Database Connection Information” on page 318.	
Advanced Options (Optional)	Click or select to specify additional information. See “Advanced Options for Database Configuration (Optional)” on page 137. You can use this option to configure Oracle RAC.	

When you configure EPM System products to use a database, EPM System Configurator ensures that the database is connected and is a supported database type. For a list of supported databases for this release, see the *Oracle Hyperion Enterprise Performance Management System Certification Matrix* (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html).

You can use Windows Authentication for SQL Server connections if you use Microsoft SQL Server database. See “[Setting Up Microsoft SQL Server Windows Authentication](#)” on page 137.

Setting Up Microsoft SQL Server Windows Authentication

► To set up Windows authentication for a SQL Server connection:

- 1 Configure SQL Server to use Windows authentication.
- 2 Grant your Windows account appropriate access to your database.
- 3 From the configuration task list, select **Configure Database**.
- 4 From the database list, select **SQL Server**.
- 5 Specify all database information except for **Username** and **Password**.

Advanced Options for Database Configuration (Optional)

The following table describes advanced options for database configuration.

EPM System Configurator Fields	Description	Your Information
JDBC URL	Enter additional attributes for the connection. If you enter a JDBC URL, it overrides the values that you entered in the Configure Database page. See Appendix E, “JDBC URL Attributes” for more information.	
Use secure connection to the database (SSL)	Select to enable secure communication to the database. To use an SSL-enabled JDBC connection, you must also enter specific parameters. See Appendix E, “JDBC URL Attributes” for more information. See the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> to see whether selecting this option is appropriate for your SSL implementation.	
Trusted Keystore	Enter or browse to the location of the keystore.	
Trusted Keystore Password	Enter the password for the keystore.	
For Oracle		
Data Tablespace	Enter the name of an existing tablespace used to store table data. The data tablespace is the logical portion of the database used to allocate storage for table data.	
Index Tablespace	To specify the database tablespaces in which the indexes are created, select the index location.	

EPM System Configurator Fields	Description	Your Information
For Financial Management		
Number of pooled DB connections	Specify the number of maximum pooled relational database connections for the application, or use the default value of 40. Financial Management requires approximately 25 relational database connections per application. For more information about pooled database connections, see Appendix F, "Database Information for Financial Management."	

Deploy to Application Server – Specify WebLogic Domain Information

- Specify information about the WebLogic domain to which to deploy the Web applications.

You deploy all EPM System products to one domain.

Note: If you are using Financial Close Management, EPM System and Oracle SOA Suite must be deployed to the same domain. If you have already configured Oracle SOA Suite, deploy EPM System products to the same domain.

If you are deploying EPM System products to a domain hosted on another machine and the domain was not created with EPM System Configurator, you must make manual updates to `jps-config.xml` and `system-jazn.xml` on the Administration Server box. See [step 18 on page 241](#) and [step 19 on page 242](#) of [Chapter 6, "Manually Deploying EPM System Web Applications."](#)

The following table describes options to define the WebLogic Server domain.

EPM System Configurator Fields	Description	Your Information
Deploy Web applications to an existing domain/Deploy Web applications to a new domain. The Administration Server for this domain will be created on this machine.	Specify whether to deploy Web applications to an existing domain or to a new domain. If you create a new domain, the WebLogic Administration Server for this domain is created on this machine.	
Domain Name	To define a new domain, enter a domain name. The default domain name is EPMSysm. To deploy to an existing domain, specify the domain to use for deployment.	
Administration Server Host	For an existing domain, specify the Administration Server Host.	

EPM System Configurator Fields	Description	Your Information
Administration Server Port	Accept the default port; or, to change the default, enter a port number that does not conflict with other applications installed on your machine.	
Administrator User	Enter the Administrator user name for the domain. By default, EPM System Configurator uses <code>epm_admin</code> .	
Administrator Password	Enter the Administrator password or enter a new password for a new domain. Tip: Make a note of this password.	
Confirm Administrator Password	If you are defining a new domain, confirm the Administrator password.	

Deploy to Application Server: Oracle WebLogic

- Specify the application server options, or click or select **Next** to accept the default entries.

The following table describes options for WebLogic application server deployment configuration.

EPM System Configurator Fields	Description	Your Information
Ear/War	Select the components to deploy.	
Managed Server Name	Displays the Weblogic Managed Server name.	
Port	Accept the default port; or, to change the default, enter a port number that does not conflict with other applications installed on your machine. See “Ports” in <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i> .	
SSL Port	Accept the default port or specify the SSL port to use for deployment. Specifying this port sets up SSL using the Java application server's default certificates. See the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> for recommendations on updating the Java application server with a valid certificate. If you are using SSL, you must disable the non-SSL port (or redirect it to the SSL port) in your Java application server after configuration to ensure secure communication.	
Advanced Set up	Click or select Set up to specify the logical address the products use to connect to the Web application server. Select this option when the Web applications do not communicate with the Web application server directly, as in the following scenarios: ● You have set up a cluster with a load balancer. ● You are using an SSL offloader. See “Advanced Setup” on page 140. For more information about clustering, see “Clustering Web Applications” on page 125 and the <i>Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide</i> .	

Deployment notes:

- Deploy all products to a single domain.
- By default, EPM System Configurator deploys 32-bit binaries to 32-bit application servers on 32-bit operating systems, and 64-bit binaries to 64-bit application servers on 64-bit operating systems.
- The EPM Workspace Web application and the Shared Services Web application are deployed when you select the Hyperion Foundation Deploy to Application Server task.
- If you are implementing a custom authentication module, you must include its Java archive (.jar) in the EPM Product classpath. See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide* for detailed procedures to implement a custom authentication module.

What Happens During Deployment: WebLogic Server

Deployment notes:

- EPM System Configurator deploys each application to the WebLogic Server domain you specified. For a new domain, the domain is created when the first application is deployed. Each application runs in a separate JVM, except for Shared Services, and EPM Workspace, which run together and are deployed to the same managed server.
- EPM System Configurator deploys the applications to `MIDDLEWARE_HOME/user_projects/domains/domainName`.
- Start and stop scripts are created in `EPM_ORACLE_INSTANCE/bin/`.
- For each application, in `EPM_ORACLE_INSTANCE/bin/deploymentScripts` there is a `setCustomParamsProduct.bat` file (.sh extension for UNIX), where you can change `JAVA_OPTIONS` when using start scripts.
- EPM System Configurator creates a cluster for each managed server.

Advanced Setup

- If you selected **Set up** during Web application server deployment or during Financial Management Web server configuration, specify the logical address the products use to connect to the Web application server.

The following table describes options for cluster setup configuration.

EPM System Configurator Fields	Description	Your Information
Select logical Web address	Select an existing logical address to edit it, or select New to specify the URL for a new cluster. You should have only one cluster for each EPM System product. EPM System Configurator creates a cluster for each managed server.	

EPM System Configurator Fields	Description	Your Information
Name	Enter a name for the cluster.	
Host	Enter a host for the cluster. Typically, enter the host name for the load balancer. If you selected “Use SSL for Web application server communications (Requires Manual Configuration)” on the “Configure Common Settings” page, ensure that the cluster URL that you override with uses an SSL port.	
Port	Enter the port number for the cluster.	
SSL Port	If you selected “Use SSL for Web application server communications (Requires Manual Configuration)” on the “Configure Common Settings” page, enter an SSL port.	
URL Context	Review or update the context path. The context path is the part of the URL that accesses the deployed Web application. For example, in the following URL, <code>workspace</code> is the context path: <code>http://webserverhost.example.com:19000/workspace</code>	

For information about clustering EPM System products, see [“Configuration Sequence in a Distributed Environment” on page 123](#) and the *Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide*.

Upgrade Note!

For Performance Management Architect, you must use cluster names that are the same as the instance names that were used in Performance Management Architect configuration in the earlier release.

Foundation-Specific Configuration Tasks

Subtopics

- [Configure Common Settings](#)
- [Set Up Shared Services and Registry Database Connection](#)
- [Update Logical Address for Web Applications](#)
- [Configure Oracle Configuration Manager](#)
- [Set up Connection to Oracle BI EE and Publisher](#)
- [Set Shared Services Admin User Password](#)
- [Configure Web Server](#)
- [Foundation Services – Import Data From Earlier Release](#)

Configure Common Settings

- Specify settings for all products on all machines that have been identified in the Shared Services Registry so far, or click or select **Next** to accept the default values.

If you configure on another machine and change any of these options, your new selections apply for all products and machines that you have not configured. If you reconfigure on a machine, the new settings apply to any products that you reconfigure and to future configurations.

The following table describes options for common settings configuration.

EPM System Configurator Fields	Description	Your Information
Create Windows Services for configured components (Windows only)	Select to configure each service as a Windows service that starts automatically when you start Windows.	
Run Windows Services as non-local system account	Select to specify a non-local system account to configure Windows services, and then specify a user name and password. Note: Oracle recommends that you select this option. If you are using Reporting and Analysis in a distributed environment, you must update the service to run as a user who has read-write access to the shared data folder. If you do not select this option, EPM System Configurator creates Windows services using the local system account. Before you start the services, change them to use the appropriate domain account	
User name	Enter the user name for the user to launch the Windows services. If you leave this field blank, EPM System Configurator creates the services using the local system account.	
Password	Enter the password for the user used to launch Windows services.	

EPM System Configurator Fields	Description	Your Information
Use SSL for Web application server communications (requires manual configuration)	Depending on your SSL implementation, select to use SSL communication for all Web applications. If this option is selected, URLs are in the form <code>https</code>. Note: Selecting this option does not enable secure communication for the Web application server and does not create and load certificates into JREs and JDKs. See <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> for more information. To change from an SSL-enabled environment to a non-SSL-enabled environment or the converse, see “Reconfiguring for SSL” on page 317. Modifying this option is not sufficient.	
Mail Server Host	For products that integrate an e-mail feature, which uses standard Simple Mail Transfer Protocol (SMTP) protocol, specify the outgoing mail (SMTP) server. To enable e-mail alerts, you must specify the SMTP server name.	
Port	Specify the mail server port number or accept the default value. If you are using SSL to communicate with the mail server, enter an SSL port.	
Administrator's Email Address	Specify the administrator's e-mail address to use for notifications.	
Use SSL to communicate with mail server	Select to use SSL communication for all e-mail communication.	
Use authentication to send email	Specify whether the mail server requires authentication, and then specify a user name and password.	
User Name	Specify the user name for the SMTP server.	
Password	Specify the password for the SMTP server.	

Set Up Shared Services and Registry Database Connection

- Specify the settings for the Shared Services and Registry database.

When you initially configure EPM System products, you configure a database for use by Foundation Services, which includes the Shared Services Registry.

When you configure the Shared Services and Registry database, EPM System Configurator ensures that the database is connected and is a supported database type. If a database is detected, you may be prompted to choose whether to use the detected database or create a database.

If you are configuring an Oracle database, EPM System Configurator checks that the database was created with the correct character set. If not, you are prompted to correct it. See the *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for character set requirements.

For a list of supported databases, see the *Oracle Hyperion Enterprise Performance Management System Certification Matrix* (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html). For database prerequisites for this release, see *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.

You can use Windows Authentication for SQL Server connections if you use Microsoft SQL Server database. See [“Setting Up Microsoft SQL Server Windows Authentication” on page 137](#).

For more information about the Shared Services Registry, see [“About the Shared Services Registry” on page 116](#).

Note: This task assumes that you have created the database. If you have not created a database, see “Preparing a Database” in *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.

If you uninstall EPM System products and then reinstall into the same location, you cannot reuse the Shared Services and Registry database.

Upgrade Notes!

- If you are upgrading from an earlier release, select **Perform first-time configuration of Shared Services database** and enter database connection information for a new database.
- If you are upgrading from Release 11.1.1.3, and you configured all EPM System products to use one database, you are alerted that pre-existing Shared Services tables have been detected in the database. When prompted to drop and recreate the tables, select **Yes**.

Note: If you are applying the maintenance release to move from Release 11.1.2.0 to Release 11.1.2.1, select **Connect to a previously configured Shared Services database**.

The following table describes options for Shared Services and Registry Database configuration.

EPM System Configurator Fields	Description	Your Information
Connect to a previously configured Shared Services database/ Perform first-time configuration of Shared Services database	When you first configure the Shared Services and Registry database, choose Perform first-time configuration of Shared Services database. This database includes the Shared Services Registry, which is used to store common information for all products. When you configure in a distributed environment, you must configure the Shared Services database on every machine. On the first machine, you are setting up the Shared Services Registry. For configurations on subsequent machines, choose Connect to a previously configured Shared Services database. In this case, you are letting the machine know the location of the Shared Services Registry. For some products, you can use this same database to store product information. In this case, each product has its own table in this database. See “Installation Planning Checklist” in <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i> for additional information about database preparation for each product. Upgrade Note! If you are upgrading from an earlier release, select Perform first-time configuration of Shared Services database and enter database connection information for a new database. If you are applying the maintenance release to move from Release 11.1.2.0 to Release 11.1.2.1, select Connect to a previously configured Shared Services database and select a release number.	

EPM System Configurator Fields	Description	Your Information
Database Type	Select the database type.	
Server	Specify the name of the database server where the Shared Services database should be created. For Oracle RAC, specify the VIP name or one of the node names as the server name.	
Port	Select the default or specify a custom Shared Services server port number on which the database listens.	
Service Name or SID, or Database Name	Specify the name of the Shared Services database. If you are using an Oracle RAC database, specify the RAC service name.	
User Name	Enter the name of the database user.	
Password	Enter the password of the database user. Note: If the password changes, reconfigure as described in Chapter 10, “Reconfiguring EPM System Products.”	
Advanced options (Optional)	Click or select to specify additional information. For more information on these options, see “Advanced Options for Database Configuration (Optional)” on page 137. You can use this option to configure Oracle RAC.	

Update Logical Address for Web Applications

- Specify the logical address details to use for Web applications, or click or select **Next** to accept the defaults:

Use this option after first-time deployment if you need to change the logical address for a deployed Web application. This task lets you change the logical address without redeploying the Web application.

Note: You need to perform this task on only one machine in the deployment.

The following table describes options for configuring the logical addresses to use for Web applications.

EPM System Configurator Fields	Description	Your Information
Set the logical Web address for all the Web applications to / Set the logical Web address for each Web application individually to	Select whether to apply the same address to all Web applications or to apply a different address to each Web application	
Product	Shows the components for which a Web application is deployed	
Host	For each enabled module, review the host name to which this Web server proxies requests.	
Port	Review or update the port numbers for the application server listen ports for the applications. The port here must match the listen port of the deployed application.	
SSL Port	Review or update the SSL port of the logical Web application. If you are using SSL, you should disable the non-SSL port (or redirect it to the SSL port) in your Java application server after configuration to ensure secure communication.	
Context	Review or update the context path. The context path is the part of the URL that accesses the deployed Web application. For example, in the following URL, <code>workspace</code> is the context path: <code>http://webserverhost.example.com:19000/workspace</code>	

Note: Use fully qualified host names for all entries. For example, `webserverhost.example.com`.

Configure Oracle Configuration Manager

- Specify the contact information to use for notifications from My Oracle Support and Oracle Configuration Manager.

Oracle Configuration Manager collects machine configuration information and installed Oracle software information on a regular basis and uploads it to My Oracle Support. Click or select **View Details** for more information.

EPM System Configurator displays this page on the first machine you configure and uses the values for each additional machine in the deployment.

The following table describes options for registering for Oracle Configuration Manager.

EPM System Configurator Fields	Description	Your Information
Email	Enter the E-mail address to use for notifications from MyOracle Support.	
View Details	Click or select View Details to see information about Oracle Support policies.	

EPM System Configurator Fields	Description	Your Information
I wish to receive security updates via My Oracle Support	Specify whether you want to receive security updates.	
My Oracle Support password	Enter your My Oracle Support password.	

Note: EPM System Installer installs Oracle Configuration Manager for you in *EPM_ORACLE_HOME/ccr*.

For more information about Oracle Configuration Manager, see http://docs.oracle.com/cd/E24625_01/index.htm

Set up Connection to Oracle BI EE and Publisher

- Specify the configuration information for EPM Workspace to work with Oracle BI EE and BI Publisher.

You must reconfigure the Web server after you perform this task. If the Web server is on this machine, select **Configure Web Server** at the same time you select **Set up Connection to Oracle BI EE and Publisher**.

The following table describes options for configuring EPM Workspace to work with Oracle BI EE and BI Publisher.

EPM System Configurator Fields	Description	Your Information
Set up Oracle BI EE		
Host	Specify the host where Oracle BI EE is installed.	
Port	Specify the port on which Oracle BI EE listens.	
SSL Port	If you are using SSL, specify the SSL port.	
URL Context	Review or update the context path. The context path is the part of the URL that accesses the deployed Web application. The default value is <i>/analytics</i> .	
Set up Oracle BI Publisher		
Host	Specify the host where BI Publisher is installed.	
Port	Specify the port on which BI Publisher listens.	
SSL Port	If you are using SSL, specify the SSL port.	
URL Context	Review or update the context path. The context path is the part of the URL that accesses the deployed Web application. The default value is <i>/xmlpserver</i> .	

Set Shared Services Admin User Password

- For hardened security, reset the password for the Shared Services admin user.

EPM System Configurator creates a preprovisioned user called `admin`, which enables you to log on to Shared Services after configuration to create and provision users. EPM System Configurator requires you to specify a new admin password during configuration. After configuration, make subsequent changes to the admin user password in the Shared Services Console. See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

The following table describes options for resetting the Shared Services admin user password.

EPM System Configurator Fields	Description	Your Information
Password	Enter a new password for the Shared Services admin user. Tip: Make a note of this password.	
Re-type Password	To confirm the new password, re-enter the password for the Shared Services admin user.	

Configure Web Server

- Specify Web server information, or click or select **Next** to accept the defaults.

Information in this page comes from applications already deployed and recorded in the Shared Services Registry and applications you are deploying in this configuration sequence.

You need only configure the Web server on the machine on which you want to run the Web server. EPM System Installer also installs Oracle HTTP Server on the machine hosting Essbase Server, but you need not configure this instance. (You can leave the “Configure Web Server” task “Pending.”)

Caution! If you have already configured the Web server and you configure any additional products, you must run EPM System Configurator again and select the Foundation Services **Configure Web Server** task. Then, restart the Web server and EPM Workspace.

Note: Enabling SSL for the Web server requires manual configuration. See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

The following table describes options for the Web server configuration.

EPM System Configurator Fields	Description	Your Information
Web Server Type	Select the Web server.	

EPM System Configurator Fields	Description	Your Information
Web Server Port	Specify the Web server port. If you use SSL, ensure that the port number that you enter is a secure port.	
Location of Web server	Specify or browse to the location of the Web server.	
Set the logical web address for the web applications to the web server	Select this option if you want EPM System Configurator to set the logical Web address for all Web applications to the Web Server. Use this option if you want to use the Web server as the load balancer. If you do not select this option, EPM System Configurator uses the address of the physical Web application as the logical address.	
Component	Review the components for which the Web server is being configured.	

Foundation Services – Import Data From Earlier Release

This option is available only if you are upgrading from an earlier release. If you are not upgrading, skip this section.

Upgrade Note!

- If you are upgrading from an earlier release, specify the location from which to import Shared Services data. You must specify the full path to `hssmigratedata.zip`, which is created with the Shared Services Upgrade Utility.

If you have not yet exported Shared Services data from the earlier release, see [“Exporting Shared Services Data from the Earlier Release” on page 183](#).

Select this task only if you also select or have already completed the “Deploy to Application Server” task for Foundation Services.

For more information about what happens during this configuration task, see [“What Happens During Shared Services Data Import” on page 203](#)

Performance Management Architect-Specific Tasks (Optional)

Subtopics

- [Configure Interface Datasources \(Optional\)](#)
- [Interface Datasource Database Type \(Optional\)](#)
- [Interface Datasource Details \(Optional\)](#)
- [Select Datasource to Edit or Delete \(Optional\)](#)

Creating an Interface Datasource is required if you want to use interface tables in Performance Management Architect. Interface tables provide a database interface that enables the import of

metadata and data from external systems into the Dimension Library. However, this task is not necessary for initial configuration. See the *Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide*. You configure the tables by creating data source links that can be used during import profile creation and data synchronization.

Configure Interface Datasources (Optional)

- Specify whether you want to create, edit, or delete a data source link.

Interface data source configuration is available only on the machine on which the Dimension Server is installed. You must register with Shared Services before performing this task.

Note: Use a database other than your repository database for interface data source. See “Preparing a Database” in *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.

The following table describes options for Performance Management Architect interface data source configuration.

EPM System Configurator Fields	Description	Your Information
Create a new datasource link	Select Create a New Datasource Link, click or select Next, and then: 1. Choose the database type. See “Interface Datasource Database Type (Optional)” on page 151. 2. Specify the interface data source database properties. See “Interface Datasource Details (Optional)” on page 151.	
Edit an existing datasource link	Select Edit an Existing Datasource Link, click or select Next, and then: 1. Choose the data source to edit. See “Select Datasource to Edit or Delete (Optional)” on page 151. 2. Modify the data source properties. See “Interface Datasource Details (Optional)” on page 151.	
Delete a datasource link	Select Delete a Datasource Link, click or select Next, and then choose the instance to delete. See “Select Datasource to Edit or Delete (Optional)” on page 151.	
Import Data Sources from an old release	Upgrade Note! If you are upgrading from an earlier release, select this option. EPM System Configurator imports data from the migrated Shared Services data and stores it in the Shared Services Registry.	

Interface Datasource Database Type (Optional)

- Select the specific database type (Oracle, SQL or DB2) and click or select **Next**.

Interface Datasource Details (Optional)

- To create or edit an interface data source, specify the database details.

The following table describes options for Performance Management Architect interface datasource details configuration.

EPM System Configurator Fields	Description	Your Information
Database Type	Displays the database type.	
Datasource Name	Accept the default name, or enter a name for the data source.	
Server	Accept the default name, or enter the name of the server hosting the database. (The default displays based on the database type.)	
Port	Accept the default port number, or enter the port number of the server hosting the database. (The default displays based on the database type.)	
SID (Oracle) or Database (MS SQL Server or IBM DB2)	Enter the database name to use as an interface data source. If you are using Oracle RAC, enter the service name.	
User	Enter the user name for the database used as the interface data source.	
Password	Enter the password for the database used as the interface data source.	
Create interface tables	Select to create the interface tables in the database. Oracle recommends that you select this option.	

Select Datasource to Edit or Delete (Optional)

- If you chose **Edit an Existing Datasource Link** or **Delete a Datasource Link**, select the data source to edit or delete.

Optional: If you are deleting a data source, select **Delete interface tables** to delete the database tables.

Essbase-Specific Tasks

Subtopics

- [Configure Essbase Server](#)
- [Setting Up Essbase Clusters](#)
- [Configuring and Starting Additional Instances of Essbase Server](#)
- [Configure Essbase Integration Services](#)
- [Configure Essbase Studio Data File Location](#)
- [Administration Services Import Data From Earlier Release](#)
- [Provider Services Import Data From Earlier Release](#)

Configure Essbase Server

- Specify the configuration information for Essbase Server, or click or select **Next** to accept the default settings. In general, Oracle recommends that you keep the default settings. However, if you are upgrading from an earlier release of Essbase, for **Full path to application location (ARBORPATH)**, specify the existing location or the replicated location of the Essbase application directory. The default location might not be correct.

Note: Oracle HTTP Server is installed with Foundation Services. It is also installed on the Essbase Server machine. In a distributed environment, configure only one instance of Oracle HTTP Server, the one on the Foundation Services machine.

Using automatic configuration with EPM System Configurator, you can configure only the 32-bit version of Essbase on 32-bit systems and the 64-bit version of Essbase on 64-bit systems.

If required, you can manually configure 32-bit Essbase client or server on a 64-bit machine. See [Appendix C, “Additional Essbase Configuration.”](#)

For information about configuring an additional instance of Essbase Server, see [“Configuring and Starting Additional Instances of Essbase Server” on page 156.](#)

During configuration, if you do not select “Essbase in Standalone mode,” EPM System Configurator automatically registers Essbase with Shared Services and writes the Shared Services connection information to `essbase.cfg`. In addition, it specifies environment variables in a file used to launch Essbase Server.

The following table describes the configuration options for Essbase Server.

Table 27 Essbase Server Configuration

EPM System Configurator Fields	Description	Your Information
Essbase Instance Name	Enter a name for this instance of Essbase.	

EPM System Configurator Fields	Description	Your Information
Set up Cluster	Click or select Set up Cluster to create a cluster to provide active-passive Essbase failover support with write-back capabilities. You can include only two instances in a cluster. See “Setting Up Essbase Clusters” on page 155. For each instance of Essbase that you configure, select Set up Cluster. When you configure the first instance of Essbase on the first machine, you define the cluster. When you configure the second instance of Essbase on the second machine, you make this Essbase Server join the cluster you created on the first machine.	
Agent Port Number	Accept the default port number on which the Essbase listens for client requests. If you change the default value, enter a port number that is not used by other programs.	
SSL Agent Port Number	Specify the SSL port on which Essbase listens for client requests.	
Start Port	Accept the default number or enter the first port number on which the Essbase Server listens for client requests. The port value is stored in <code>essbase.cfg</code>.	
End Port	Enter the greatest port number that Essbase Server can use to connect. Essbase uses at least two ports for each application. For a large number of applications, you need a larger port range.	
Full path to application location (ARBORPATH)	The location for applications. Note: Previous versions of Essbase used <code>ARBORPATH</code> to refer to the installation location. If you are setting up an Essbase cluster, the application location must be a shared drive. When you configure the second machine in the cluster, the location must match the location you specified for the first machine in the cluster. Upgrade Note! If you are upgrading from an earlier release of Essbase, specify the existing location or the replicated location of the Essbase application directory. The default location might not be correct.	

EPM System Configurator Fields	Description	Your Information
Set the language to be used by Essbase (ESSLANG)	The <i>ESSLANG</i> variable is a locale definition. For example, to support American English, set ESSLANG to English_UnitedStates.Latin1@Binary. Based on the value you specify, EPM System Configurator updates <i>setEssbaseEnv.bat</i> (in <i>EPM_ORACLE_INSTANCE/EssbaseServer/essbaseserver1/bin</i>) with the <i>ESSLANG</i> value and Essbase uses this value. Verify the operating system locale setting on your computer and select the matching <i>ESSLANG</i> value. The <i>ESSLANG</i> setting for a computer must agree with the locale setting of the computer's operating system. In addition, on a Windows machine, the <i>ESSLANG</i> value and the system locale must match the language of the Planning application that you plan to take offline. You must choose the correct <i>ESSLANG</i> setting for Essbase products to start successfully. The <i>ESSLANG</i> setting can affect the function of applications and databases. On Windows, if <i>ESSLANG</i> is already set on the computer (for example, if you have already installed Essbase), the current value is selected by default. On UNIX platforms, the <i>ESSLANG</i> setting defaults to English (Latin I) regardless of the setting in the operating system. For more details about ESSLANG, see "ESSLANG Variable" on page 154. For the full list of supported ESSLANG values, see <i>Oracle Essbase Database Administrator's Guide</i>.	
Deploy Essbase in standalone mode	Select to use legacy security for Essbase Server instead of Shared Services security. This option is not available if you use the <code>-forceRegistry</code> option to start EPM System Configurator.	

ESSLANG Variable

Each Essbase Server installation requires that you set an *ESSLANG* value. See the topic on managing file encoding in the *Oracle Essbase Database Administrator's Guide*.

The default value for *ESSLANG* is English (Latin1). For examples of *ESSLANG* values for non-English languages, see the list of supported locales in the Unicode-mode applications topic in the *Oracle Essbase Database Administrator's Guide*.

During configuration, EPM System Configurator writes the *ESSLANG* value that you specify to the Shared Services Registry and to the launch file used to start Essbase.

For Administration Services and Provider Services, there is no prompt to specify the *ESSLANG* value; it is set to the default value "English_UnitedStates.Latin1@Binary."

Managing ESSLANG Settings

The *ESSLANG* environment variable on the Essbase Server computer must retain the locale value of an application for as long as that application is in use.

Note: If the *ESSLANG* variable is changed after applications are created on an Essbase Server computer, those applications cannot be started.

Clients also use locales. *ESSLANG* variables are optional for clients. EPM System Configurator sets the Essbase client *ESSLANG* environment variable during configuration, and defaults it to “English_UnitedStates.Latin1@Binary.” Client and Essbase locale values must be the same for non-Unicode-mode clients and applications. For Unicode-mode applications, client and Essbase locale values can be different.

To avoid possible database corruption, the *ESSLANG* locale specification must be the same on client and Essbase Server in the following situations:

- The client is not Unicode-enabled.
- A Unicode-enabled client saves an outline over an existing outline on a version of the Essbase Server that is not Unicode-enabled.
- A Unicode-enabled client saves an outline to a non-Unicode application on a Unicode-enabled Essbase Server.

The *ESSLANG* locale specifications on clients and Essbase Server computers can be different when a Unicode-enabled client views and updates an outline belonging to a Unicode-mode application.

For products that use Essbase RTC in a non-English environment, you must set *ESSLANG* manually on the client.

Setting Up Essbase Clusters

You can cluster Essbase Server to provide active-passive failover with write-back capability.

An Essbase cluster can contain only two Essbase servers. To install an additional Essbase server, install an additional instance of Essbase on another machine.

On the first machine, when you configure Essbase Server, click **Set up Cluster** to define the cluster. On the second machine, when you configure Essbase Server, click **Set up Cluster** to make this Essbase Server join the cluster you created on the first machine.

► To set up an Essbase cluster:

- 1 For the first instance of Essbase Server, on the Essbase Server Configuration page of EPM System Configurator, click or select **Set up Cluster** and specify the information for the Essbase cluster on the **Set up Cluster** page.
- 2 Repeat the steps on the second machine for the second instance of Essbase Server.

During cluster setup on the second machine, EPM System Configurator updates `essbase.cfg` to specify `failovermode=true`.

The following table describes options for configuring Essbase for failover.

EPM System Configurator Fields	Description	Your Information
Select cluster	Select New to create a new cluster to which to add an Essbase Server. Or, to add an Essbase Server to an existing cluster, select the cluster name from the list.	

EPM System Configurator Fields	Description	Your Information
Cluster Name	If you select New, specify the name of the cluster. The Essbase cluster name must be unique in a deployment environment. It cannot contain special characters or spaces.	

Note the following information about Essbase clusters:

- An Essbase cluster can contain only two Essbase servers. The *ARBORPATH* and application location must be the same for both servers.
- When you set up an Essbase cluster, the application location must be a shared drive. The location must reside on a file system that all Essbase servers in the cluster can reach.
- Essbase supports the following types of shared drives:
 - Any SAN storage device with a shared disk file system supported on the installation platform
 - Any NAS device over a supported network protocol

Oracle recommends SAN or a fast NAS device such as NetApp filers because of reduced I/O latency and failover times.

- If you are adding the second Essbase Server to a cluster, EPM System Configurator changes its *ARBORPATH* application location to that of the first Essbase Server.
- If you have been working in a nonclustered environment and want to change to a clustered environment, and the Essbase applications are not in a shared location, you must migrate the applications to a shared location. See “Copying or Migrating Applications” in the *Oracle Essbase Database Administrator's Guide*.

When you are using Essbase in a clustered environment, you must perform additional steps to set up Essbase failover on both nodes of the cluster.

See [“Setting Up Active-Passive Essbase Clusters” on page 252](#).

As an alternative to active-passive clustering using OPMN, you can set up active-active clustering using Provider Services. See “Essbase Clustering and Failover” in the *Oracle Hyperion Enterprise Performance Management System High Availability and Disaster Recovery Guide*.

Configuring and Starting Additional Instances of Essbase Server

You can install Essbase Server once and configure multiple additional instances. Configure the first instance as usual using EPM System Configurator. For subsequent instances, specify a new instance during configuration.

For subsequent instances, you can configure only the 32-bit version of Essbase on 32-bit systems and the 64-bit version of Essbase on 64-bit systems. Configuring a 32-bit version of Essbase on a 64-bit system is not supported when you configure additional instances.

➤ To configure an additional instance of Essbase Server on the same machine:

- 1 After you have configured the first instance of Essbase Server, launch EPM System Configurator on the same machine.
- 2 On the “Configure a New or Existing EPM Oracle Instance” page, specify the location for the additional instance of Essbase Server.

The default location for a subsequent instance is *MIDDLEWARE_HOME/user_projects/epmsystemN*, where *N* is the number of the instance.

- 3 On the Essbase Server Configuration page, specify the following information:

- A unique Essbase instance name
- A unique agent port number
- A unique SSL agent port number
- A unique port range. The range of ports used by one Essbase Server instance must not overlap the range of ports used by another instance or any other products.

The port numbers for the additional instance of Essbase Server are stored in the *essbase.cfg* file for this installation.

- For ARBORPATH: If this instance is in a cluster with another instance, this instance must have the same application location as the first instance. If this instance is not in a cluster with another instance the ARBORPATH can be different.

- 4 Complete configuration with EPM System Configurator.

- 5 To prevent a port conflict in OPMN, you must manually edit *opmn.xml*. See [“Modifying OPMN for an Additional Instance of Essbase” on page 254](#).

Each instance of Essbase Server has its own OPMN and its own startup script. To start an additional instance of Essbase Server, use the *startEssbase.bat* | *.sh* script for this instance, in *EssbaseInstanceLocation/bin*.

Each instance has its own log file in *EssbaseInstanceLocation/diagnostics/logs/essbase*.

Configure Essbase Integration Services

This configuration task adds the Integration Services start script to the single EPM System start script; however, no EPM System Configurator pages appear, and you need not enter information.

- Select **Configure Essbase Integration Services** from the Task Selection page and proceed through EPM System Configurator.

Configure Essbase Studio Data File Location

- Specify the location to be used for sample file installation or for text files that will be used as data sources, or click or select **Next** to accept the default.

EPM System Configurator includes the value you enter in the Essbase Studio `server.properties` file.

The following table describes options for Essbase Studio data file location configuration.

EPM System Configurator Fields	Description	Your Information
Server data file location	Specify the location to be used for sample file installation or for text files that will be used as data sources. By default the location is <code>EPM_ORACLE_INSTANCE/BPMS/bpms1/datafiles</code>. Upgrade Note! If you are upgrading from an earlier release, specify the existing location or the replicated location for the Essbase Studio data files.	

Administration Services Import Data From Earlier Release

This option is available only if you are upgrading from an earlier release. If you are not upgrading, skip this section.

Upgrade Note!

- If you are upgrading from an earlier release, specify the location from which to import Administration Services data.

If you have not yet prepared data from the earlier release for upgrading, see [“Copying Files for Temporary Use During Configuration” on page 185](#).

This task is available only if you also select or have already completed the “Configure Database” task for Administration Services.

During configuration, this data is moved to the Shared Services Registry and the files are no longer used.

Provider Services Import Data From Earlier Release

This option is available only if you are upgrading from an earlier release. If you are not upgrading, skip this section.

Upgrade Note!

- If you are upgrading from an earlier release, specify the location from which to import Provider Services data.

If you have not yet prepared data from the earlier release for upgrading, see [“Copying Files for Temporary Use During Configuration”](#) on page 185.

This task is available only if you also select or have already completed the “Deploy to Application Server” task for Provider Services.

During configuration, this data is moved to the Shared Services Registry and the files are no longer used.

Reporting and Analysis-Specific Tasks

Subtopics

- [Configure Reporting and Analysis Framework Services](#)
- [Configure Reporting and Analysis Services](#)

Configure Reporting and Analysis Framework Services

- Specify the following Reporting and Analysis Framework service information, or click or select **Next** to accept the defaults:

The following table describes options for Reporting and Analysis Framework Services configuration.

EPM System Configurator Fields	Description	Your Information
Repository Directory	Specify the directory where the Reporting and Analysis repository data is stored; for example: <i>EPM_ORACLE_INSTANCE/ReportingAnalysis/data/directoryName</i>. If you are replicating repositories, specify a writable shared drive. All instances should share the file system location. If you are running this service as a Windows service, use a UNC path instead of a mapped drive. Doing so prevents potential permissions errors than can occur when Windows attempts to create a mapped drive at startup. Upgrade Note! If you are upgrading from an earlier release, specify the existing location or the replicated location for the Reporting and Analysis repository.	
Port Range	Specify the port range to use for Reporting and Analysis Framework services.	

Configure Reporting and Analysis Services

- Specify the following options to configure Interactive Reporting services, or click or select **Next** to accept the defaults.

The following table describes options for Interactive Reporting service configuration.

EPM System Configurator Fields	Description	Your Information
Port Range	Specify the range of ports to use, or click or select Next to keep the default port ranges.	

Financial Management-Specific Tasks

Subtopics

- [Financial Management – Configure DCOM](#)
- [Financial Management – Configure Application Server](#)
- [Financial Management – Configure Clusters](#)
- [Financial Management – Register Servers and Clusters](#)
- [Financial Management – Configure Web Server](#)
- [Financial Management – Configure Web Application](#)
- [Financial Management – Enable Smart View Provider](#)
- [Financial Management – Enable Life Cycle Management Provider](#)
- [Financial Management – Enable Web Services](#)
- [Web Server Configuration Advanced Options](#)
- [Financial Management Upgrade Applications from Earlier Release](#)

You must run EPM System Configurator as an administrator to configure Financial Management.

Financial Management – Configure DCOM

- Specify the Distributed Component Object Model (DCOM) account information to configure DCOM security.

You must specify the Windows administrator under whose identity the application server processes are launched. Perform this task on the machines that host the Financial Management Web server tier and on the Services tier.

Note: You must run as a Domain or Local Administrator with Group Policies rights to configure the DCOM user.

Because all Financial Management application server processes are run under an administrator identity (the specified Windows admin user), no other administrator is required to log on to the application server to start the application server processes.

The following table describes options for Financial Management DCOM configuration.

EPM System Configurator Fields	Description	Your Information
Domain User	Specify the user name. Limitations for the domain and user name: ● A user name cannot duplicate any other user or group name of the computer being administered. A user name can contain up to 20 uppercase and lowercase letters. A user name cannot consist solely of periods (.) and spaces and cannot contain these special characters: " ' \ [] : ; = , + * ? < > & ● Do not use a single quotation mark (') in a user name. A user with a single quotation mark in the user name cannot log on to Financial Management. ● You cannot use an IP address as a domain name when you configure the user account.	
Password	Enter the password. The password can contain up to 14 characters and is case-sensitive. The system does not verify the password, so ensure that the password that you use is valid. Note: If the entries that you make require changing the local security policy on the system, you must log off and log on again to commit the changes.	
Re-type Password	Enter the password again to confirm it.	
Enable DCOM on this machine	Select to enable DCOM on this machine. This option is available for the Application services and Web tier installation of Financial Management. This option is not available if DCOM is already enabled on the computer. This option enables DCOM for the entire computer. Enabling DCOM makes possible the launching of servers and connecting to objects by remote clients for the machine. It also sets the DCOM Default Authentication level to None for the computer. The Enable DCOM step is required for Financial Management client components to communicate with Financial Management application server components when the application server is on a different computer. It also enables the Financial Management client and application server computers to be on different domains.	

After you enter the Windows administrator information, EPM System Configurator performs these steps:

- Creates the Windows admin user (DCOM user) on the local machine if the user does not exist
- Adds the user to the local Administrators group. The Financial Management administrator user or group must be a member of the local Administrators group on each application server.
- Assigns these local security policies to the admin user: “Act as part of the operating system” and “Log on as a batch job.” These local security rights must be enabled for users on each Financial Management application server.
- Sets the “DCOM Run as” identity for all Financial Management application processes

- Sets DCOM Launch permissions for users

If the DCOM user password changes, or if you want to use a different DCOM user name and password, ensure that the user settings are valid and working, and then use EPM System Configurator to re-enter the DCOM user name and password. Perform this task on the Web tier and on the Services tier for Financial Management.

Financial Management – Configure Application Server

- Specify the application server information, or click or select **Next** to accept the defaults.

The following table describes options for Financial Management application server configuration.

EPM System Configurator Fields	Description	Your Information
Working Folder	Accept the default, or enter or browse to the path for the Server Working Folder. The Server Working folder stores system-generated files, such as reports. The default Server Working Folder location is <i>EPM_ORACLE_INSTANCE/products/FinancialManagement/Server Working Folder</i>. Note: When you use multiple application servers, each server should have its own working folder. Application servers should not share working folders, because temporary files might be overwritten.	
Max App Server Delay	Accept the default value or enter the time interval in seconds between when a change is made to an application and when the change is visible to users accessing the application through another application server.	
Max Data Sync Delay	Accept the default value or enter the time interval in seconds between when a change is made to data and when the change is visible to users accessing the data through another application server.	
Creator Group	Accept the default value or enter the Creator Group name. Only users in the Application Creator Group can create Financial Management applications.	
Administrator Group	Accept the default value or enter the Administrator Group name. Only users in the Administrator Group can access these administrative tasks: ● List and log out users on the system ● Manage servers and applications ● Delete system messages The Administrator Group must be a group that has already been defined in Shared Services. If you do not specify the Administrator Group, the DCOM user has access to system administrative tasks.	

Financial Management – Configure Clusters

- Specify the names of the application servers that participate in the cluster.

An application server cluster is a set of application servers running the same application. Clustered application servers provide load balancing and failover capability and enable the servers to be transparently maintained while applications remain available for users.

The following table describes options for Financial Management cluster configuration.

EPM System Configurator Fields	Description	Your Information
Defined Clusters	Select the cluster for which you want to specify servers. This list displays all clusters you have specified on any machine in the installation. You can also add, edit, or remove a cluster. Upgrade Note! This list displays all clusters that you configured in the earlier release. If no clusters exist, EPM System Configurator creates a default cluster. You must use cluster names that are the same as the instance names that were used for Financial Management configuration in the earlier release.	
Servers in the Cluster	The list displays all servers in the currently selected cluster. To remove a server from the list, select it and click or select Remove. Upgrade Note! If you installed the upgraded version on a new server, make sure to add the upgraded server name to the cluster and remove the earlier release server.	
Available Servers	Select the server that you want to include in the cluster, and click or select Add. The list displays all available servers. If there is only one server, it is listed here. Servers already in a cluster are not available and are not listed.	

If you use multiple application servers connected to one database server, you must ensure that the system clocks on the application servers are synchronized. If the clocks are not synchronized, the data being viewed might not be current.

Note: The synchronization between Financial Management application servers is based on system time. Changing the clock can affect this synchronization. For the time change to and from Daylight Savings Time, Oracle recommends that you stop the servers before the time change and restart them afterward.

Financial Management – Register Servers and Clusters

- Register the server or cluster before accessing applications.

You can perform this task on each machine in the installation. Specify the server or cluster that you want this Web application to communicate with.

The following table describes options for Financial Management server/cluster registration.

EPM System Configurator Fields	Description	Your Information
Registered Servers and Clusters	To remove a server or cluster from the list to register, select it and click or select Remove . This list displays registered servers or clusters.	
Available Servers and Clusters	Select the server or cluster that you want to register and click or select Add . This list displays defined clusters and individual servers.	

Financial Management – Configure Web Server

- Select the components that you want to enable as Web applications in IIS or click or select **Next** to accept the default.

Financial Management ASP.NET Web service is deployed as part of Financial Management Web Server configuration.

The following table describes options for Financial Management Web server configuration.

EPM System Configurator Fields	Description	Your Information
Configure IIS for Financial Management Web Application	Select to enable Financial Management as a Web application in IIS, and then specify the options for the Financial Management Web server. See “Financial Management – Configure Web Application” on page 164 .	
Configure IIS to Enable Smart View Provider	Select to enable Smart View as a Web application in IIS, and then specify the options for the Smart View Web server. See “Financial Management – Enable Smart View Provider” on page 166 .	
Configure IIS to Enable Lifecycle Management	Select to enable Lifecycle Management as a Web application in IIS. See “Financial Management – Enable Life Cycle Management Provider” on page 166 .	
Configure IIS to Financial Management Web Services (required for Financial Close Management)	Select to enable the Financial Management Web Services Web application in IIS. See “Financial Management – Enable Web Services” on page 167 .	

Financial Management – Configure Web Application

- Configure the Web server for Financial Management or click or select **Next** to accept the defaults.

The following table describes options for Financial Management Web application configuration.

EPM System Configurator Fields	Description	Your Information
Web Server Installation Directory	Accept the default or enter or browse to the path for the Financial Management Web installation directory. Note: The default location is the directory in which the Web components were installed; for example: <code>EPM_ORACLE_HOME/products/FinancialManagement/Web/HFM</code> .	
Virtual Directory Name	Accept the default or enter the virtual directory name; for example: <code>HFM</code> .	
Web Session Timeout	Accept the default or specify the timeout in minutes. This value also applies to the Financial Management Smart View Provider and the Financial Management Oracle Hyperion Enterprise Performance Management System Lifecycle Management Provider.	
Advanced Options	Click or select Advanced Options to specify additional options for the Web server configuration. See “Financial Management Web Application Advanced Options” on page 165 .	

Financial Management Web Application Advanced Options

- Specify additional options for the Financial Management Web application.

The following table describes advanced options for Financial Management Web application configuration.

EPM System Configurator Fields	Description	Your Information
File Transfer Directory	Browse to the path for the directory for the load, extract, and log files, or use the default location; for example, <code>EPM_ORACLE_HOME/products/FinancialManagement/Web/FileTransfer</code> . The File Transfer directory should be located outside of the virtual directory. If it is located under the virtual directory, you should set No Execute rights on the File Transfer directory. You must create a file transfer directory for load and extract log files and temporary files. When you specify the file transfer directory, the system performs these steps: 1. Creates the file transfer directory, if it does not exist 2. Assigns the IIS users Windows permissions of Read, Write, and Execute This directory is also used for the Financial Management Lifecycle Management Provider.	
Max Upload File Size	Enter a maximum size for loading Web files. If you use IIS 6.0, you can set the ASP file size properties for loading and extracting files on the Web. Oracle recommends that you use the default file size properties unless you experience problems during loading and extracting. However, if you load or extract huge files and send large amounts of data to the browser and experience errors, you can change the file size settings. For example, if you load large files, you might receive a 403 error message if the maximum upload file size is set too low. In this case, you must increase the maximum file size. You enter the file size in bytes, so if you expect to load files of 200 MB, you change the setting for maximum upload file size to 200,000,000 bytes.	

EPM System Configurator Fields	Description	Your Information
Response Buffer Size	Enter a maximum size for extracting Web files.	

If you run IIS 5.0 Isolation mode in IIS 6.0 on Windows 2003, after you create Web directories and set ASP properties, you must manually set two additional IIS properties for the application protection and authentication level.

See [“Configuring Settings for IIS 5.0 Isolation Mode \(Optional\)” on page 267](#).

Financial Management — Enable Smart View Provider

- Configure the Web server for Smart View.

The following table describes options for Financial Management Smart View Provider configuration.

EPM System Configurator Fields	Description	Your Information
Web Server Installation Directory	Enter the location in which Smart View was installed or use the default location. Note: The default location is <code>EPM_ORACLE_HOME/products/FinancialManagement/Web/HFMOOfficeProvider</code> .	
Virtual Directory Name	Enter the virtual directory name for Smart View, or use the default virtual directory. The default directory name is <code>HFMOOfficeProvider</code> .	
Advanced Options	Click or select to specify advanced options for Smart View configuration. See “Web Server Configuration Advanced Options” on page 168 .	

The Smart View Provider uses the Web Session Timeout value that you set for the Financial Management Web application. See [“Financial Management — Configure Web Application” on page 164](#).

Financial Management — Enable Life Cycle Management Provider

- Configure the Web server for Lifecycle Management.

The following table describes options for Financial Management Lifecycle Management configuration.

EPM System Configurator Fields	Description	Your Information
Web Server Installation Directory	Enter the location in which Lifecycle Management was installed, or use the default location. Note: The default location is <code>EPM_ORACLE_HOME/products/FinancialManagement/Web/HFMLCMService</code> .	
Virtual Directory Name	Enter the virtual directory name for Lifecycle Management, or use the default virtual directory. The default directory name is <code>hfm lcm service</code> .	
Advanced Options	Click or select to specify advanced options for Lifecycle Management configuration. See “Web Server Configuration Advanced Options” on page 168 .	

The Lifecycle Management Provider uses the Web Session Timeout value that you set for the Financial Management Web application. See [“Financial Management — Configure Web Application” on page 164](#). It also uses the File Transfer Directory that you specify for Financial Management Web application advanced options. See [“Financial Management Web Application Advanced Options” on page 165](#).

Financial Management — Enable Web Services

- Configure the Web server for Financial Management Web Services.

The following table describes options for Financial Management Web Services configuration.

EPM System Configurator Fields	Description	Your Information
Web Server Installation Directory	Enter the location in which Financial Management Web Services was installed, or use the default location. Note: The default location is <code>EPM_ORACLE_HOME/products/FinancialManagement/Web/HFMApplicationService</code> .	
Virtual Directory Name	Enter the virtual directory name for Financial Management Web Services, or use the default virtual directory. The default directory name is <code>hfm application service</code> .	
Web Session Timeout	Accept the default, or enter the Web session timeout value in seconds. Note: The default session timeout is 20 minutes. You should set the timeout option to a length of time appropriate for your sessions.	
Advanced Options	Click or select to specify advanced options for Financial Management Web Services configuration. See “Web Server Configuration Advanced Options” on page 168 .	

Financial Management Web Services uses the File Transfer Directory that you specify for Financial Management Web application advanced options. See [“Financial Management Web Application Advanced Options” on page 165](#).

Web Server Configuration Advanced Options

- Specify additional options for the Smart View, Lifecycle Management, and Financial Management Web Services Web server configuration.

The following table describes the advanced options for Smart View, Lifecycle Management, and Financial Management Web Services Web server configuration.

EPM System Configurator Fields	Description	Your Information
Enable HTTP Compression	Specify whether to enable compression for communication between the Web browser and the Web application. By default, compression is on.	
Enable Proxy Server Keep Alive	If you use a proxy server between the Web server and client, select this option and set a time interval, in seconds, for the connection.	
Keep Alive Interval (in seconds)	If you use a proxy server between the Web server and client, select this option and set a time interval, in seconds, for the connection.	
Always warn when client version is newer (Smart View Provider only)	Select to warn of a newer add-in version.	
Always force client to upgrade (Smart View Provider only)	Select to upgrade to the latest add-in version to ensure client and server version compatibility.	

Financial Management Upgrade Applications from Earlier Release

This option is available only if you are upgrading from an earlier release. If you are not upgrading, skip this section.

Upgrade Note!

- Select **Upgrade Applications from Earlier Release** from the Task Selection page and proceed through EPM System Configurator.

Note that there is no EPM System Configurator page for this task and you need not enter information.

This task is available only if you also select or have already completed the “Configure Database” and “Configure Financial Management DCOM” tasks for Financial Management.

During the execution of this task, EPM System Configurator upgrades Financial Management applications from the earlier release to the current release.

Performance Scorecard – Configure Attachment Files Location

- Accept the default location to access Performance Scorecard files or specify a new directory, and then select or click or select **Next**.

The following table describes Performance Scorecard configuration options.

EPM System Configurator Fields	Description	Your Information
Performance Scorecard attachment files location	Accept the default location, or specify a different directory to access Performance Scorecard files. Files are stored in <code>EPM_ORACLE_INSTANCE/HPS/hpsfiles</code> but if you want to use a symbolic link or drive mapping to the storage location, enter the symbolic link name or drive map path here. Upgrade Note! If you are upgrading from an earlier release, specify the existing location or the replicated location for the Performance Scorecard files.	

Strategic Finance-Specific Tasks

Subtopics

- [Strategic Finance Configure Data Folder](#)
- [Strategic Finance Configure Web Services](#)

Strategic Finance Configure Data Folder

- Specify the location of the Strategic Finance data directory, or click or select **Next** to accept the default.

The following table describes options for Strategic Finance configuration.

EPM System Configurator Fields	Description	Your Information
Data Directory Location	Accept the default, or specify the location for Strategic Finance data. Upgrade Note! If you are upgrading from an earlier release of Strategic Finance, specify the existing location or the replicated location of the data directory for the earlier release.	

When you are prompted for the Directory for Server data files, do not specify the Strategic Finance data directory in a file share directory on a remote server or in an NAS (Network Attached Storage) area. Specify the data directory as a local hard drive or SAN (Storage Area Network array).

Strategic Finance Configure Web Services

- Specify the following options to configure the Strategic Finance Web server:

The following table describes options for Strategic Finance Web server configuration.

EPM System Configurator Fields	Description	Your Information
Enable Web Service	Select to activate the Strategic Finance Web services Application Programming Interface for the Web. This must be enabled for the interface to FDM to work.	
Strategic Finance Server	Accept the default, or specify the Strategic Finance server to associate with.	

Financial Close Management-Specific Tasks

Subtopics

- [Configure Content Management System Location \(Optional\)](#)
- [Deploy to SOA](#)

Configure Content Management System Location (Optional)

If you have an existing content management system, you can configure Financial Close Management to link to the documents stored in it.

- Specify the location of a Document Management System to use.

The following table describes options for Financial Close Management custom settings configuration.

EPM System Configurator Fields	Description	Your Information
URL	Enter the URL of the system hosting the Document Management system. For example for Release 10g, enter: <code>http://host:port/</code> See the <i>Oracle Hyperion Enterprise Performance Management System Certification Matrix</i> (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html) for information about supported document management systems.	

Deploy to SOA

Note that this configuration task has a required configuration sequence. See “[Financial Close Management Installation and Configuration Prerequisites and Roadmap](#)” on page 86 for more information.

- Select **Deploy to SOA** from the Task Selection page and proceed through EPM System Configurator. You must restart WebLogic Administration Server after completing this task.

Note that there is no EPM System Configurator page for this task and you need not enter information.

During the execution of this task, EPM System Configurator embeds information about these products in the SOA component and then deploys the SOA composites:

- Financial Management
- FDM
- Financial Reporting

FDM-Specific Configuration Tasks

Subtopics

- [Configure FDM Server](#)
- [Configure FDM Web Application](#)

These tasks update the Shared Services Registry with information about FDM and register FDM with Shared Services; however, no EPM System Configurator pages appear, and you need not enter information. See the *Oracle Hyperion Financial Data Quality Management Configuration Guide* for additional information about configuring FDM.

Configure FDM Server

- Select **Configure FDM Server** from the Task Selection page and proceed through EPM System Configurator.

Configure FDM Web Application

- Select **Configure FDM Web Application** from the Task Selection page and proceed through EPM System Configurator.

Performing Silent Configurations

Silent configurations automate the configuration process so that you can configure EPM System products on multiple computers without manually specifying configuration settings on each machine.

To enable silent configurations, record your configuration settings in a response file. You can then run a silent configuration from the command line, using the configuration options that were saved in the response file.

Note: If you are performing a silent configuration using Remote Desktop, run it using an admin console session. (Launch Remote Desktop using `mstsc /admin`).

► To record configuration settings and run a silent configuration:

- 1 **Navigate to the directory that contains EPM System Configurator. By default, the directory is**
`EPM_ORACLE_HOME/common/config/version_number`.
- 2 **From a command line prompt, enter `configtool.bat -record filename` or `./configtool.sh -record filename`, where *filename* includes an absolute path or file name.**

The file is saved in XML format, but you need not save the file with a `.xml` extension.

EPM System Configurator launches.

If you do not specify a file name, EPM System Configurator creates the file for you:
`EPM_ORACLE_HOME/common/config/version_number/configResponse.xml`.
- 3 **Proceed through the EPM System Configurator, specifying the options that you want to record.**

Note: When you are recording silent configurations, you can proceed through EPM System Configurator only one time. (You cannot select go back to the Product Selection page to continue with more configuration tasks.) If you return to the Task Selection page, the response file is rerecorded.

Configuration options are recorded in the response file, which is in XML format. Passwords are saved in encrypted format in the response file.

You are now ready to configure products in silent mode.

- 4 **Copy the response file to the machine on which you configure products. You can also copy the file to a network drive that is accessible from the machines you want to configure.**
- 5 **From the command line, enter a command:**

`configtool.bat -silent filename` or `./configtool.sh -silent filename`.

The configuration runs in the background.

You can also record configuration settings from within EPM System Configurator. To record configuration settings, during configuration, on the Configuration Confirmation page, click or select Save, browse to a location, specify a file name, and click or select Save. The file is saved in the same format as for silent configurations.

Upgrade Note!

Silent response files are not compatible between earlier releases and Release 11.1.2.1. If you created silent response files for use with any earlier release of EPM System, you must re-create them for use with EPM System Release 11.1.2.1.

You can modify the response file later to change configuration options.

Tip: To change the password later, open the response file in a text editor, enter the password in clear text, and change the `<encrypted>` parameter to `false`. The next time you perform a silent configuration using this response file, EPM System Configurator encrypts the password and reverts the `<encrypted>` parameter to `true`.

Setting Up Essbase in Standalone Mode

If you want to install Essbase in standalone mode (not using Shared Services), you can skip the installation for Foundation Services Web applications. However, you must still configure the Shared Services Registry database. To configure the Shared Services Registry database without installing Foundation Services Web applications, you run EPM System Configurator from the command line using the `-forceRegistry` option. This option forces the “Shared Services and Registry Database Configuration” page to display during configuration so you can enter database details for the Shared Services Registry. EPM System Configurator populates the database with tables for the Shared Services Registry, but not for Foundation Services.

➤ To configure the Shared Services Registry without installing Foundation Services Web applications:

1 Start EPM System Configurator from the command line, including the `-forceRegistry` option:

- From a Windows console, change to `EPM_ORACLE_HOME/common/config/version_number`, and then enter `configtool.bat -forceRegistry`.
- On UNIX, change to `EPM_ORACLE_HOME/common/config/version_number` and then enter `./configtool.sh -forceRegistry`.

The `-forceRegistry` option also works with EPM System Configurator in silent mode and in console mode; for example:

```
configtool.bat|.sh -forceRegistry -record  
configtool.bat|.sh -forceRegistry -silent  
configtool.bat|.sh -forceRegistry -console
```

2 Proceed through the configuration, entering the database details for the Shared Services Registry.

What Happens During Configuration

During product configuration, EPM System Configurator completes these actions:

- Performs the configuration tasks that you selected
- Configures help for products in EPM Workspace
- Configures each product to start as a Windows service, if you select this option on the “Configure Common Settings” page during configuration
- Creates a default Shared Services Administrator role in Native Directory when you configure Foundation Services. This is the only preprovisioned user created. Subsequently, when you

use EPM System Configurator to register products with Shared Services, the Shared Services Administrator role is provisioned with the product administrator role.

Troubleshooting Configuration

Configuration results are noted in `EPM_ORACLE_INSTANCE/diagnostics/logs/config/configtool_summary.log`.

If you encounter errors, perform these tasks:

- Configure products individually.
- See the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide* for information about configuration checks, debugging using logs, troubleshooting methodology, and solutions to common configuration issues.

Tip: EPM System Configurator provides a script, `ziplogs`, in `EPM_ORACLE_INSTANCE/bin`. You can run this script to provide files to Support for troubleshooting installation and configuration issues. This tool collects all log files, including logs for installation, configuration, and validation and registry reports if you have used those tools, and saves them in ZIP file in `EPM_ORACLE_INSTANCE/diagnostics/ziplogs`.

5

Upgrading EPM System Products

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This chapter describes the upgrade process for EPM System products. To upgrade EPM System products to Release 11.1.2.1, you deploy Release 11.1.2.1 software in a new location and move applications and data to the new deployment. When you upgrade, you must install and configure using the same user that was used to install and configure the earlier release.

Note: Upgrading does not apply to moving from Release 11.1.2.0 to Release 11.1.2.1. Use the “Apply Maintenance Release” option in EPM System Installer instead. See [“Maintenance Release Installation Checklist” on page 21](#). When you apply the maintenance release, you need not follow the upgrade procedures described in this chapter.

Note: For most clients, if you are upgrading from an earlier release of an EPM System client component, you must uninstall the earlier release before you install the new release. No configuration is required. If you have an earlier release of Financial Reporting Studio, you must uninstall it and stop the Financial Reporting Print Server service if it is running before installing the new version. See [“Installing EPM System Clients” on page 109](#).

About Upgrading

When using EPM System products, the term upgrade is defined as follows: The process of deploying a new software release and moving applications, data, and provisioning information from the earlier deployment to the new deployment.

You can repeat the upgrade process as needed to get the latest data from the previous release. See [“Repeating the Upgrade Process for Applications” on page 236](#).

To upgrade EPM System products to Release 11.1.2.1, you install and configure Release 11.1.2.1 software in a new location and move applications and data to the new deployment environment. There are two supported scenarios:

- Install EPM System on a *new* machine or machines. You can either reuse the existing database and data, or replicate the database and data to a new machine.

If you are upgrading to a new machine, you must upgrade to a platform of the same type. For example, if the earlier release was on a Windows machine, you must upgrade to a Windows machine. If the earlier release was on a Linux machine, you must upgrade to a Linux machine.
- Install EPM System on the *existing* machine or machines (Oracle recommends that you install in a new installation location). You can either reuse the existing database and data, or replicate the database and data to a new machine.

Caution! If you want to maintain your earlier release environment, you must install on a new machine and you must replicate data.

Logs related to upgrading are located in `EPM_ORACLE_INSTANCE/diagnostics/logs/` upgrades. For more information about logging during upgrades, see the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

Supported Upgrade Paths

You can upgrade to EPM System Release 11.1.2.1 from the following releases:

Table 28 Supported upgrade paths

Release Upgrade Path From	To
11.1.1.3.x	11.1.2.1

Release Upgrade Path From	To
9.3.3.x Note: If you were using Performance Management Architect Release 9.3.1, you can download Performance Management Architect Release 9.3.3 from My Oracle Support.	11.1.2.1
9.2.1.x	11.1.2.1
An environment that includes multiple releases, which can include an environment with one instance of Shared Services or an environment with two instances of Shared Services	See “Upgrading from an Environment with Multiple Releases” on page 235.

- If you are starting from Release 9.2.x, Oracle recommends the following upgrade path: 9.2.0 to 9.2.1 to 11.1.2.1.
- If you are starting from Release 9.3.x, Oracle recommends the following upgrade path: 9.3.0 to 9.3.1 to 9.3.3 to 11.1.2.1.
- If you are starting from Release 11.1.1.x, Oracle recommends the following upgrade path: 11.1.1.0 or 11.1.1.1 or 11.1.1.2 to 11.1.1.3 to 11.1.2.1.
- If you are starting from an earlier release, Oracle recommends that you upgrade to the highest level release that directly supports upgrade from your starting release
- Security Synchronization between Essbase and Shared Services was removed in Essbase Release 9.3, starting with Release 9.3.1.4.1. Essbase and Shared Services Release 11.1.1.3, however, still synchronize security information. For this reason, if you are using Essbase Release 9.3.1.4.1, 9.3.1.5, 9.3.1.6, or 9.3.1.7, you must first upgrade all products to Release 9.3.3, as recommended above. Upgrading to Release 11.1.1.3 is not an option for these Essbase releases.

Upgrading Checklist

The following table identifies the high-level tasks that you perform to upgrade EPM System products. You must perform tasks in this order and you must complete the entire checklist.

The process described in this chapter assumes that you upgrade one product at a time and indicates where a sequence is required.

Note: If you are upgrading from an environment with multiple releases, see [“Upgrading from an Environment with Multiple Releases”](#) on page 235.

Table 29 Upgrading Checklist

Task	Reference	Check When Completed
Go through the tasks in the following section once for all EPM System products at one time.		
Preparing to Upgrade		
1. Review release compatibility, system requirements, and other prerequisites for this release. If your database environment needs to be upgraded, perform the database upgrade before you proceed. See the database documentation for details.	● <i>Oracle Hyperion Enterprise Performance Management System Certification Matrix</i> (http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html) ● <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i>	
2. Prepare the new environment for the new Release 11.1.2.1 installation. Note: Create a new database to store Shared Services data. (However, if you are upgrading from Release 11.1.1.3 and you used one database repository for all products, you do not need to create a new database for Shared Services. The Shared Services tables will be dropped during configuration.) Tip: In preparation for a new installation, you can use a worksheet to note the machines on which earlier release products are installed, and the machines on which you plan to install the new release products. You can refer to this information in subsequent procedures.	● <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i> ● “Planning the Upgrade Installation” on page 180	
3. Perform upgrade-specific prerequisite tasks.	“Upgrade Installation Prerequisites” on page 182	
4. Download and prepare the installation files.	“Downloading and Preparing Files for Installation” on page 183	
5. Prepare data for upgrading.	“Preparing Data for Upgrading” on page 183	
6. Stop EPM System services if you are upgrading on the same machine.	“Stopping EPM System Services” on page 196	
7. Uninstall the earlier release of EPM System products. Oracle recommends that you uninstall if you are upgrading to the same machine.	“Uninstalling the Earlier Release of EPM System Products” on page 196	

Task	Reference	Check When Completed
Iterate through the following checklist items for each product, one product at a time, in the following order: ● Foundation Services. ● Essbase Server and all other Essbase products. Note that after configuring other Essbase products, you must also configure the Web server. After configuration, restart the Web Server and EPM Workspace. You can configure all Essbase products at one time if the products that use a database are configured to use the same database. Otherwise, you can perform the configure database task separately for each Essbase product. ● All other EPM System products, in any order. Note that after configuring each product, you must also configure the Web server. After configuration, restart the Web Server and EPM Workspace. Tip: Oracle recommends that after completing each step, you return to this checklist so that you perform the upgrade steps in the correct order.		
Installing and Configuring		
8. Install EPM System products (choosing the New installation option) in a new installation location.	● “Installing EPM System Products for an Upgrade” on page 197 for information specific to installation when you are upgrading ● Chapter 3, “Installing EPM System Products” for general information about installation	
9. Configure Release 11.1.2.1 products. Note that you must configure Foundation Services first. Foundation Services must be installed and configured for other products to configure successfully. Caution! If you have already configured the Web server and you configure any additional products, you must run EPM System Configurator again and select the Foundation Services Configure Web Server task. Then, restart the Web server and EPM Workspace.	● “Configuring EPM System Products in an Upgrade” on page 197 for information specific to configuration when you are upgrading	
10. Start EPM System services.	Chapter 8, “Starting and Stopping EPM System Products”	
Validating the Installation		
11 Using EPM System Diagnostics, validate the installation.	Chapter 9, “Validating the Installation and Verifying Deployment”	
Performing Post-Configuration Tasks		
12. Complete product-specific postconfiguration tasks.	Chapter 7, “Performing Postconfiguration Tasks”	
13. If products have been rehosted on a new server, make updates, such as updating data source connections.	“Updating References to a Rehosted Environment” on page 206	

Task	Reference	Check When Completed
14. Upgrade applications for the following products from the earlier release to the current release: ● FDM Note that Planning applications are upgraded using the Upgrade Wizard, which also includes steps for rehosting. Other applications are upgraded during configuration.	“Upgrading Applications from the Earlier Release to the Current Release” on page 222	
15. Perform product-specific upgrade tasks for products that you upgraded.	“Performing Additional Product-Specific Upgrade Tasks” on page 223	
16. If your previous deployment did not use Shared Services security, transfer users and groups to Shared Services. This step is required for earlier releases of the following products if you have not yet implemented Shared Services security. ● Performance Scorecard ● Strategic Finance ● FDM If you used Shared Services security in the earlier release, you can skip this procedure.	“Transferring Users and Groups” on page 231	

Planning the Upgrade Installation

In preparation for upgrade, use the following worksheet to note the machines on which the earlier release products are installed, and on which machines you plan to install the new release products.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Table 30 Planning the Upgrade Installation

Product	Earlier Release Server Name(s)	Earlier Release Port Number(s)	New Release Server Name(s)	New Release Port Number(s)
Foundation Services				
Foundation Services				
Performance Management Architect Web Application				
Performance Management Architect Data Synchronizer Service				
Performance Management Architect Dimension Server Service (Windows only)				
Calculation Manager Web Application				

Product	Earlier Release Server Name(s)	Earlier Release Port Number(s)	New Release Server Name(s)	New Release Port Number(s)
Essbase				
Essbase Server				
Essbase Administration Services				
Provider Services Web Application				
Essbase Integration Services				
Essbase Studio Server				
Reporting and Analysis				
Reporting and Analysis Framework Web Application				
Reporting and Analysis Framework Services and Common Libraries				
Interactive Reporting Services				
Production Reporting Engine				
Financial Reporting Web Application				
Financial Reporting Print Server Service (Windows only)				
Web Analysis Web Application				
Financial Performance Management Applications				
Planning Web Application				
Financial Management Web Applications				
Financial Management Web Service				
Financial Management Service				
Performance Scorecard Web Reports Web Application				
Performance Scorecard Alerter Web Application				
Performance Scorecard ETL Web Application				
Strategic Finance Web Services				
Strategic Finance Service				
Strategic Finance Integration with Financial Management Services (Server), Strategic Finance Integration with Enterprise Services (Server)				

Product	Earlier Release Server Name(s)	Earlier Release Port Number(s)	New Release Server Name(s)	New Release Port Number(s)
Profitability and Cost Management Web Application				
Data Management				
FDM Web Application				
FDM Load Balancer				
FDM Task Manager				
FDM Server				
ERP Integrator Web Application				

Upgrade Installation Prerequisites

Subtopics

- [Backing Up the Earlier Release](#)
- [Performing Product-Specific Prerequisites](#)

Backing Up the Earlier Release

Before you proceed with an upgrade, ensure that you have backed up information from the earlier release including databases, applications, and other files. For instructions:

- For Release 9.2.1 and Release 9.3.3 products, see the earlier product release installation guide.
- For Release 11.1.1.3 products, see the *Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide*.

Performing Product-Specific Prerequisites

Ensure that you meet the following product-specific requirements:

- If Shared Services was configured with NTLM as a provider, you must migrate users before you upgrade. See “Migrating Users and Groups Across User Directories” in the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.
- Performance Management Architect - If you are upgrading from Release 9.3.3, before you upgrade Performance Management Architect, allow enough space for the database to double in size.
- Strategic Finance - If you are using Strategic Finance with the built-in NTLM security in your earlier release, before upgrading you need to perform an additional task. Using the earlier release, either move existing Strategic Finance built-in NTLM users to Active Directory or native users in Shared Services before upgrading Strategic Finance. See the

Oracle Hyperion Enterprise Performance Management System Security Administration Guide and [“Transferring Existing Strategic Finance Users to Shared Services” on page 232.](#)

- For ERP Integrator, for any data rules that were not run in Release 11.1.1.3, specify a default value for the scenario dimension. If you do not specify a default value, these rules are not accessible in the new release.

When you are done with this step, return to the [“Upgrading Checklist” on page 177.](#)

Downloading and Preparing Files for Installation

Download files for Release 11.1.2.1 and extract the zip file contents. See [Chapter 2, “Preparing for Installation.”](#)

When you are done with this step, return to the [“Upgrading Checklist” on page 177.](#)

Preparing Data for Upgrading

Subtopics

- [Exporting Shared Services Data from the Earlier Release](#)
- [Copying Files for Temporary Use During Configuration](#)
- [Replicating Data](#)
- [Replicating the Databases \(Optional\)](#)

Exporting Shared Services Data from the Earlier Release

To use data from the earlier release of Shared Services, you export the data using a utility, and then copy the resulting file to the machine hosting the new installation. During configuration, EPM System Configurator extracts the necessary data for use in the current release.

Note: The database, Shared Services, and OpenLDAP must be running before you perform this procedure.

Note: Before you migrate Shared Services data, ensure that the admin user is provisioned for the Essbase Server. You can remove this provisioning after the upgrade is complete.

➤ To export Shared Services data from the earlier release:

- 1 **If you have not already done so, download files for Release 11.1.2.1 and extract the contents of the System Installer ZIP file.**

If you have not yet downloaded the System Installer ZIP file (Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition

Release 11.1.2.1 for *platformName*), download it from the Oracle Software Delivery Cloud. See [Chapter 2, “Preparing for Installation.”](#)

Tip: Use a zip file extraction program that can handle long path names, such as 7-Zip.

- 2 In the *SystemInstallerExtractLocation/Migration* directory, look for *HSSMigrate.zip* and extract the contents to the *HYPERION_HOME* directory on the machine hosting the earlier release of Shared Services.
- 3 From a command line, run the following script from the *HYPERION_HOME/Migrate* directory:

```
hssmigrate.bat|sh
```

The utility searches for Shared Services configuration files and prompts you for confirmation.

Tip: To ensure successful export of Lifecycle Management data from Release 11.1.1.3 on UNIX, set executable permissions on *set_hyphome_servername_1.sh*, in *\$home/*.

- 4 At the prompt, review the location from which the utility will extract Shared Services configuration files. If the path is correct, press Enter. If the path is not correct, enter 2, specify the correct path, and then press Enter.

Tip: The path you enter should be the path for the *CSS.xml*, *Domain.xml*, and *WorkflowEngine.properties* files, for example: *HYPERION_HOME/AppServer/InstalledApps/WebServerName/WebServerVersion*.

The utility creates a file, *hssmigratedata.zip*, in *HYPERION_HOME/migrate*, that stores the Shared Services data.

Tip: If the utility reports errors, review the logs in *HYPERION_HOME/migrate/logs*, correct any errors, and then re-run the utility to generate a new ZIP file that replaces the existing file.

- 5 Copy *hssmigratedata.zip* from *HYPERION_HOME/migrate* to the machine on which you plan to host the new release of Shared Services, or make the file available on a shared drive. (If you are installing on the same machine, make sure the location is outside of *HYPERION_HOME*.)

You specify the location during configuration.

- 6 In a distributed installation, for some products, if products will be installed on a machine or machines other than the machine hosting Shared Services, copy *hssmigratedata.zip* to each machine and unzip the contents to the *MIDDLEWARE_HOME* directory.

This step is required for Essbase Studio, Web Analysis, Administration Services if you are also using Business Rules, and Performance Scorecard.

Create the *MIDDLEWARE_HOME* directory if it does not exist. You must specify this *MIDDLEWARE_HOME* during installation.

Tip: If you do not want to create the *MIDDLEWARE_HOME* directory in advance, you can create a temporary folder to store these files. After installation, unzip *hssmigratedata.zip* to the *MIDDLEWARE_HOME* created by EPM System Installer.

For more information about what happens during Shared Services data import, see [“What Happens During Shared Services Data Import” on page 203](#).

Copying Files for Temporary Use During Configuration

If you are upgrading Provider Services, Administration Services, or Planning, some files from the earlier release of EPM System are required during configuration of the new release. You must make the files available on a shared drive or copy them from the earlier release installation to the machine hosting the new installation for use during configuration with EPM System Configurator.

During configuration with EPM System Configurator, this data is moved to the Shared Services Registry and the files are no longer used.

➤ To copy the files required for configuration:

- 1 On the machine hosting the new release installation, prepare a temporary location to store files from the earlier release.**

During configuration, you specify the location of these files.

- 2 Copy the following files from the earlier release installation to the directory that you just created:**

Table 31 Files for Temporary Use During Configuration

Product	Files to Copy for Temporary Use
Provider Services	If you are upgrading from Release 9.3.3 or Release 11.1.1.3, copy all Provider Services files to a single folder, for example: <pre>ProviderServicesDataLocation/ domain.db essbase.properties</pre> If you are upgrading from Release 9.2.1, the directory structure that you copy to must be: <pre>ProviderServicesDataLocation/ ahas/domain.db svp/domain.db essbase.properties svp.properties</pre> Copy the following files: ● <code>essbase.properties</code>, located in: ○ Release 9.2.1: <i>HighAvailabilityServicesInstallationDirectory/bin</i> OR <i>SmartViewProviderInstallationDirectory/bin</i> ○ Release 9.3.3: <i>HYPERION_HOME/APS/bin</i> ○ Release 11.1.1.3: <i>HYPERION_HOME/products/Essbase/aps/bin</i> ● <code>datasources.xml</code> (for upgrades from Release 11.1.1.3 only), located in: <i>HYPERION_HOME/products/Essbase/aps/bin</i> ● <code>svp.properties</code>, for upgrades from Release 9.2.1 only if you are using SmartView Provider, located in <i>SmartViewProviderInstallationDirectory/bin</i> ● <code>domain.db</code>, located in: ○ Release 9.2.1: <i>HighAvailabilityServicesInstallationDirectory/data</i> AND <i>SmartViewProviderInstallationDirectory/data</i> If you have High Availability Services and SmartView provider, copy both files. ○ Release 9.3.3: <i>HYPERION_HOME/APS/data</i> ○ Release 11.1.1.3: <i>HYPERION_HOME/products/Essbase/aps/data</i> ● Smart slice definitions (for upgrades from Release 11.1.1.3 only) located in <i>HYPERION_HOME/products/Essbase/aps/data/cubeviews</i>. Copy the entire <code>cubeviews</code> directory structure. For upgrade from Release 9.2.1, during configuration, EPM System Configurator merges the contents of the two <code>domain.db</code> files if both files exist and the contents of <code>essbase.properties</code> and <code>svp.properties</code> if both files exist.

Product	Files to Copy for Temporary Use
Administration Services and Business Rules	● Copy the entire storage directory structure located at: <i>HYPERION_HOME/products/Essbase/eas/storage</i>. For Release 9.3.3, the directory structure is <i>HYPERION_HOME/AnalyticAdministrationServices/storage</i>. ● <i>HBRServer.properties</i> (for Release 9.2.1 and 9.3.3 using Planning); the default location is <i>HYPERION_HOME/products/Essbase/eas</i>. For Release 9.3.3, the directory structure is <i>HYPERION_HOME/AnalyticAdministrationServices</i>. Copy the file to <i>MIDDLEWARE_HOME/EPMDData/eas</i> on the new machine, which in a default installation is <i>c:/oracle/middleware/EPMDData/eas</i>. You must specify this <i>MIDDLEWARE_HOME</i> during installation. Tip: If you do not want to create the <i>MIDDLEWARE_HOME</i> directory in advance, you can create a temporary folder to store the file. After installation, copy <i>HBRServer.properties</i> to the <i>MIDDLEWARE_HOME</i> created by EPM System Installer. For Release 11.1.1.3 using Planning, to replicate <i>HBRServer.properties</i>, perform the following steps: 1. On the source machine hosting Release 11.1.1.3, use Lifecycle Management to export Business Rules Server-related properties (<i>HBRServer.properties</i>): In the Shared Services Console, go to Application Groups, then Foundation, then Deployment Metadata, select Essbase under Shared Services Registry and perform a migration to the file system by clicking Define Migration. The data is exported to: <i>HYPERION_HOME/common/import_export/admin@Native Directory/Export_File_Name</i>. 2. Copy the exported folder structure (info and resource folders) to the target machine hosting Release 11.1.2.1 to any folder, such as <i>MIDDLEWARE_HOME/EPMDData/eas</i>. Oracle recommends that you copy the exported folder structure under <i>MIDDLEWARE_HOME/EPMDData/eas</i> along with the storage folder required for the Administration Services upgrade. You must specify this <i>MIDDLEWARE_HOME</i> during installation. Tip: If you do not want to create the <i>MIDDLEWARE_HOME</i> directory in advance, you can create a temporary folder to store the file. After installation, copy <i>HBRServer.properties</i> to the <i>MIDDLEWARE_HOME</i> created by EPM System Installer. Make note of the location to which you replicate the data. During configuration with EPM System Configurator, you enter this location on the Import Data From Earlier Release configuration page for Administration Services.
Reporting and Analysis	<i>server.xml</i>, located in: ● Release 9.2.1 and 9.3.3: <i>BIPLUS_HOME/common/config</i>, where <i>BIPLUS_HOME</i> by default is <i>HYPERION_HOME/BIPlus</i> ● Release 11.1.1.3: <i>HYPERION_HOME/common/workspacert/9.5.0.0/common/config/dynamic/UUID</i>, where <i>UUID</i> is the dynamic ID for the folder. If there is more than one <i>UUID</i> folder, retrieve <i>server.xml</i> from the folder that contains <i>irdas_default.txt</i>. Make note of the location to which you replicate the data. During postconfiguration tasks for Interactive Reporting, you specify the location of this file when you import DAS data sources.

Product	Files to Copy for Temporary Use
Planning	HspJSHome.properties (for Release 9.2.1 only, in <i>HYPERION_HOME</i>/AppServer/InstalledApps/<i>Web_application_server</i>/HyperionPlanning/WEB-INF/classes) Note: The file required for Planning Release 9.2.1 must be copied to <i>MIDDLEWARE_HOME</i>/EPMDData/planning, which in a default installation is <i>c:/oracle/middleware/EPMDData/planning</i>. You are not prompted for this location during configuration. Create the <i>MIDDLEWARE_HOME</i> directory if it does not exist. You must specify this <i>MIDDLEWARE_HOME</i> during installation. Tip: If you do not want to create the <i>MIDDLEWARE_HOME</i> directory in advance, you can create a temporary folder to store the file. After installation, copy HspJSHome.properties to the <i>MIDDLEWARE_HOME</i> created by EPM System Installer.

Replicating Data

When you upgrade to EPM System Release 11.1.2.1, you use the data from the earlier release in one of two ways:

- You can replicate the data to a new machine, making it accessible from the new installation environment. For example, use this option if you want to maintain the earlier release environment.

During product configuration with EPM System Configurator, you specify the new, replicated location for data when you configure the product data directory locations.

Note: Oracle recommends that you replicate data.

- You can leave the data on the existing machine, making the drive shareable. If you choose to leave data on the existing machine, you can skip the procedures in this section. During product configuration with EPM System Configurator, you specify the existing data location. You can choose this option only if you no longer need to maintain the earlier release environment.

Note: For Essbase, you can choose this option only if the data is on a supported type of shared drive, such as a SAN drive.

► To replicate product data files:

- 1 On the shared drive or machine hosting the data for the new release, create directories to store the replicated product data.

Tip: This location is the data storage location for Release 11.1.2.1, so store data in a meaningful, permanent location. You might choose to specify a location for each product, for example: *EPMDData/productName*. Do not store data in the directory that is to be used as *EPM_ORACLE_INSTANCE*, which in a default installation is *Oracle/Middleware/user_projects/epmsystem1*. (*EPM_ORACLE_INSTANCE* must be an empty directory.)

- 2 Replicate data as noted in the following table for each EPM System component.

During configuration during an upgrade, EPM System Configurator prompts you for the data location.

Table 32 Data to Replicate for Upgrading

Product	Data to Replicate
Essbase	Essbase provides a tool to help with replicating data. See “Preparing Essbase Data for Upgrading” on page 190. In addition, note the following: If you are installing this release of Essbase on a new machine, gather additional data from the machine hosting the earlier release installation: ● Make a list of the ODBC DSNs defined on the machine so that you can redefine them on the new machine. Perform this step for Essbase and Integration Services. ● Make a list of JAVA options (<code>ESS_JVM_OPTIONn</code>) that are set on the machine so that you can redefine them on the new machine (either as environment variables (Windows) or through <code>hyperionenv.doc</code> (UNIX)).
Administration Services/ Business Rules	<code>HBRClient.properties</code>; the default location is <code>HYPERION_HOME/products/Essbase/eas</code>. For Release 9.3.3, the location is <code>HYPERION_HOME/AnalyticAdministrationServices</code>. You must copy the file to <code>EPM_ORACLE_HOME/products/essbase/eas</code> on the target machine. Tip: If you have already installed the new release, copy the <code>HBRClient.properties</code> from the source machine over the existing file on the target machine.
Essbase Studio	For upgrades from Release 11.1.1.3, text files that are used as data sources. In Release 11.1.1.3, these files were stored by default in <code>HYPERION_HOME/products/Essbase/EssbaseStudio/Server/datafiles</code>. Note: Make note of the location to which you replicate the data. During configuration with EPM System Configurator, you enter this location on the Configure Essbase Studio Data File Location configuration page.
Reporting and Analysis	Data files. By default these files were stored in the following location: ● 9.2.1 and 9.3.3: <code>BIPLUS_HOME/data/RM1_servername</code> ● 11.1.1.3: <code>HYPERION_HOME/products/Foundation/workspace/data/RM1_servername</code> Note: Make note of the location to which you replicate the data. During configuration with EPM System Configurator, you enter this location on the Reporting and Analysis Framework Services configuration page, for Repository Directory.
Performance Scorecard	Attachment and note files. By default these files were stored in the <code>/attachments</code> and <code>/notes</code> directories in following location: ● Release 9.2.1: <code>HYPERION_HOME/hps/9.2/AppServer/InstalledApps/WEB_SERVERVERSION/webappsconf</code> ● Release 9.3.3 and 11.1.1.3: <code>HYPERION_HOME/deployments/WEB_SERVER/webappsconf</code> Note: Make note of the location to which you replicate the data. During configuration with EPM System Configurator, you enter this location on the Performance Scorecard configuration page, for Specify directory to store Performance Scorecard files.

Product	Data to Replicate
Strategic Finance	Data files. By default these files were stored in the following location: - For Release 9.2.1 and Release 9.3.3: /HSFData - For Release 11.1.1.3: <i>HYPERION_HOME</i>/products/hsf/HSFData Note: Make note of the location to which you replicate the data files. During configuration with EPM System Configurator, you enter this location on the Strategic Finance configuration page.
FDM	Data files. For each application, copy the entire data directory structure. To see the location of the source application data: From Workbench client, select Add Application, select the application, click Modify and then note the data location. Repeat for each application. The FDM data directory on the new machine should be a UNC share and should be available to the DCOM user used to configure FDM. This directory structure must be replicated to the new environment if it is not accessible from the new environment. Note: Make note of the location to which you replicate the FDM data directory. During FDM configuration, for each application, you specify the new data directory.

Preparing Essbase Data for Upgrading

The Essbase Staging Tool simplifies preparing data for upgrade. If you need to replicate data, use the following procedure. You must replicate all applications. If you do not want some of the applications in the upgraded environment, delete them after completing the entire upgrade process.

Notes:

- The Essbase Server must be running before you launch the Essbase Staging Tool. The tool shuts down the Server as needed. To ensure data integrity, disable logins and make sure no users are active before starting the Staging Tool.
- If the *ESSLANG* environment variable is not set on the machine on which you are running Staging Tool, the Staging Tool sets the value to `English_UnitedStates.Latin1@Binary`. The *ESSLANG* value for the Staging Tool should be same as the *ESSLANG* value for the Essbase Server.
- On a 64-bit Linux system, before you run the Staging Tool, install the 64-bit version of the `libaio` package version 0.3.105-2 or higher.

If you are upgrading from an earlier release and an application has more than 127 linked reporting objects, perform the following procedure to export linked reporting objects before you run the Staging Tool.

Tip: To determine how many linked reporting objects an application has, use the MAXL command `query database DBS-NAME list lro all;`, for example, `MAXL> query database sample.basic list lro all;`.

➤ To export linked reporting objects:

- 1 On the machine hosting the earlier release of Essbase, export linked reporting objects by backing up the application linked reporting object data to a specified directory by using the following MAXL command:

```
EXPORT database DBS-NAME LRO to server directory 'directoryName';
```

For example:

```
MAXL> EXPORT database Sample.Basic LRO to server directory 'V1';
```

In this example, Sample.Basic LRO data is exported to Sample-Basic-V1 in *ARBORPATH/app*, where *ARBORPATH* is the server *ARBORPATH*.

- 2 Delete the linked reporting objects from the earlier release application with the following MAXL command:

```
ALTER database DBS-NAME delete LRO all;
```

For example:

```
MAXL> ALTER database sample.basic delete LRO all;
```

- 3 Move the application to Release 11.1.2.1 using the Staging Tool, described in the next procedure.
- 4 Note that you must manually import the linked reporting objects later in the upgrade process.

Tip: If you want to maintain your earlier release environment, reimport the linked reporting objects on the source system after the upgrade process is complete.

➤ To prepare Essbase data for upgrading perform the following tasks on the machine hosting the earlier release installation:

- 1 Oracle recommends that you perform data validation for Essbase applications:

- Start Essbase Server.
- Use the MaxL command `alter system resync sss` to sync up security information.
- For BSO applications, use the MaxL command `alter database applicationName.databaseName validate using default error_file;` against the database. If the validation returns errors, revert to a backup that is free of errors.
- Stop Essbase Server and back up all application files, database files, and the security file.
- Restart Essbase Server and then in Administration Services Console, run a full restructure on the database.

- 2 Using Administration Services, edit Application Properties for each application (select **General** then **Startup**) to ensure that **Start application when Essbase Server starts** is NOT selected.

You can also view this property for all applications using the MAXL command `display application all;` to ensure that `autostartup` is set to `FALSE` for all applications. (Use the MAXL command `alter application DBSName disable autostartup;` to turn off the property for each application as needed.)

- 3 If you have not already done so, download files for Release 11.1.2.1 and extract the contents of the System Installer ZIP file.

If you have not yet downloaded the System Installer ZIP file, download it from the Oracle Software Delivery Cloud. See [Chapter 2, “Preparing for Installation.”](#)

Extract the contents to a directory that does not have spaces in the name.

Tip: Use a zip file extraction program that can handle long path names, such as 7-Zip.

- 4 In the *SystemInstallerExtractLocation/Migration* directory, look for *EssStagingTool.zip* and extract the contents to any empty directory (*EssStagingToolExtractLocation*) on the machine hosting the earlier release of Essbase.

Use the version of the Staging Tool for the platform from which you are upgrading. For example, if you are upgrading from a 32-bit machine to a 64-bit machine, use the 32-bit Staging Tool.

- 5 From a command line, run the following script from the *EssStagingToolExtractLocation* directory:

```
essStage.bat | sh username [agentPort]
```

where *username* is the name of any Essbase user who is an administrator. *agentPort* is optional and specifies the port on which the Essbase instance is running. The default value is 1423.

- 6 When prompted, enter the Administrator password.

The Staging Tool queries Essbase for a list of applications and the disk volumes that are defined, and for ASO applications it queries for a list of table spaces that are defined.

- 7 At the prompt, review the list of methods for preparing data for upgrade, and then select a method:

- **Same-named disk volumes, table spaces, and ARBORPATH on source and target.** This option is the fastest. If you select this method, the system you are upgrading on must use the same disk volume, table spaces, and ARBORPATH as the earlier release.
- **Differently-named disk volumes, table spaces, or ARBORPATH on source and target.** If you select this method, you can specify a different disk volume, table spaces, or ARBORPATH on the system you are upgrading to than what is defined on the earlier release system.

Note: If you select this method, make note of the new ARBORPATH location. During configuration with EPM System Configurator, you enter this location on the Essbase configuration page, for **Full path to application location (ARBORPATH)**.

- **Consolidated disk volumes or tablespaces on target by exporting data.** Select this method if you want to consolidate disk volumes on the system to which you are upgrading. This method exports data to text files so that you can later import them on the upgraded system. Because this method is the slowest, use it only if you need to consolidate disk volumes, for example if the source machine has volumes defined for c, d, and e drives and the target machine has only c and d drives. This option performs some data validation during export.

8 Select whether you want to apply this method to all applications or to only some applications.

Note that all applications must be replicated to ensure the integrity of the `essbase.sec` file. If you select only some applications, you must select a second method of preparing the data for all remaining applications.

If you select **Yes** for **Select all applications**, proceed to [step 11](#).

9 If you selected **No** for **Select all applications**, enter the number for each application to which you want to apply the first data preparation method that you selected. When you are finished selecting applications, press Enter.

10 If you selected **No** for **Select all applications**, select the data preparation method to use for all of the remaining applications.

If you selected **Same-named disk volumes, table spaces, and ARBORPATH on source and target** or **Differently-named disk volumes, table spaces, or ARBORPATH on source and target**, the Staging Tool automatically selects **Consolidated disk volumes or tablespaces on target by exporting data** for the remaining applications.

11 Depending on the data preparation method that you selected, the next steps vary:

- If you selected **Same-named disk volumes, table spaces, and ARBORPATH on source and target**, enter **Y** to proceed with preparing data.

The Staging Tool prepares `essbase.cfg`, `essbase.sec`, data, and applications for file transfer.

- If you selected **Differently-named disk volumes, table spaces, or ARBORPATH on source and target**:

- a. Specify a new `ARBORPATH` location for the machine on which you are upgrading and then press Enter. The `ARBORPATH` for the current release is displayed in parentheses for your reference.

Caution! The `ARBORPATH` that you specify cannot be the directory that is to be used as `EPM_ORACLE_INSTANCE`, which in a default installation is `Oracle/Middleware/user_projects/epmsystem1`. (`EPM_ORACLE_INSTANCE` must be an empty directory.)

Tip: `ARBORPATH` is the location for applications; previous releases used `ARBORPATH` to refer to the installation location. `ESSBASEPATH` is now used to define the installation location. For more information, see “Understanding How Essbase Files Are Stored” in the *Oracle Essbase Database Administrator's Guide*.

- b. If prompted, specify a new disk volume for the machine on which you are upgrading and then press Enter. The disk volume for the current release is displayed in parentheses for your reference.
- c. If prompted, specify a new default tablespace for the machine on which you are upgrading and then press Enter. The default tablespace for the current release is

displayed in parentheses for your reference. (This step applies only to ASO applications.)

- d. Enter **Y** to proceed with preparing data.

The Staging Tool prepares `essbase.cfg`, `essbase.sec`, data, and applications for file transfer, updating internal references to `ARBORPATH`, disk volumes, and tablespaces as needed. Later in the upgrade process you must run a script (`editagtsec.msh`) to update disk volume settings in `essbase.sec` for the relocated applications.

- If you selected **Consolidated disk volumes or tablespaces on target by exporting data:**

- a. Specify the directory to which to export data, and then enter **Y** to proceed with preparing data.

The tool prepares a list of data to export, and then copies the data to the export directory you specified. It shuts down Essbase before copying files. If it cannot shut down Essbase, you are prompted to shut down Essbase.

- b. If you are prompted to shut down Essbase, shut it down, and then press Enter to continue.

The Staging Tool prepares data files, exported data along with a script to import it, and a script for editing the security file.

Note that with this option, you must perform additional tasks later in the process: You must run a script (`editagtsec.msh`) to update disk volume settings in `essbase.sec` for the relocated applications. You must manually import LROs and data later in the upgrade process using a script (`importdata.msh`).

The Staging Tool displays the processing status for each application.

If the Staging Tool displays the error "Cannot open file [%s]" for sample applications, you can ignore the message. EPM System Installer installs sample applications on the new host machine.

Note that the Staging Tool copies all of the files and directories under the specified `ARBORPATH`, disk volume locations, and tablespace locations.

12 Review the methods for transferring the processed files, select a method, and then enter **Y** to continue.

- **Automatically copy files to a mounted or mapped file system.** If you select this option, the Staging Tool prompts you for the mounted drive location for each of the destination `ARBORPATH`, table space, disk volume, and export data directory directories. Specify the mounted path of the same `ARBORPATH` path that you specified during the data preparation method. The destination path for tablespace should map to the tablespace specified in the data preparation method. The destination path for disk volume path should map to complete paths and not just to disk volume.

Specify an existing, empty directory.

If errors occur during file transfer, the Staging Tool closes and shuts down Essbase.

The Staging Tool also prepares a file with file transfer instructions. If the copy process fails for any reason, follow the instructions in `EssStagingToolExtractLocation/`

`work/FileTransferSteps.txt` to manually copy the data to the machine on which you plan to upgrade Essbase.

- **Get a list of file transfer instructions.** If you select this option, the Staging Tool exports data and prepares a file with file transfer instructions. Review `EssStagingToolExtractLocation/work/FileTransferSteps.txt` for details and follow the steps to manually copy the data to the machine on which you plan to upgrade Essbase.
- **Exit.** If there were any failures or errors during the application processing, you can exit, correct the errors, and restart the Staging Tool.

The Staging Tool notes when the file transfer is complete and shuts down Essbase.

- 13** If needed, update the files on the target machine to ensure that they have the same owner as the user who will install Essbase.

`EssStagingToolExtractLocation/work/FileTransferSteps.txt` includes the list of files to update.

- 14** (Optional) Review the log file, `EssStagingToolExtractLocation/essStaging.log`, for details of the Staging Tool actions.

You can use the log during configuration with EPM System Configurator to remind you of the options you specified.

If you realize that you made mistakes in your entries for the Staging Tool, you can rerun it.

- 15** On the target machine hosting the new release, make required updates to `essbase.cfg`: Update the `DISKVOLUMES`, `SSAUDIT`, `SSAUDITR`, and `TransactionLogLocation` settings to reflect new directory locations.

Note: The Staging Tools copies `ARBORPATH/app/appname/dbname/Replay`, which is related to the transaction logging and replay feature. Because Oracle recommends a fresh implementation of transaction logging and replay in any given Essbase release, Oracle recommends that you delete these files on the upgraded system before you proceed. As a best practice, the files in the `LOGLOCATION` and `Replay` directories should be backed up periodically.

When you have finished preparing Essbase data for upgrading, return to [“Replicating Data” on page 188](#) to replicate data for other EPM System products.

Replicating the Databases (Optional)

Optionally, replicate the entire database or databases to a new machine or machines. Oracle recommends that you replicate the databases.

During database configuration with EPM System Configurator, specify the new product database location.

Note the following about replicating databases:

- If the database version needs to be updated, perform the database upgrade before replicating data.
- If you want to maintain the earlier release installation, you must replicate the databases.
- You do not need to replicate the Shared Services database. Shared Services requires a new database and data from the earlier release is imported during configuration.
- If you are upgrading from Essbase Studio Release 11.1.1.3, ensure that the data is valid before you upgrade to ensure successful upgrade.
- For Financial Management and MS SQL Server, if you are restoring a backup of an existing database in a new environment, make sure that the current database user has access to the imported database objects. This can be accomplished using a script such as `master.sp_change_users_login`.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Stopping EPM System Services

If you are installing Release 11.1.2.1 on the same machine as the earlier release installation, stop all EPM System services. If you need details about stopping services, see [Chapter 8, “Starting and Stopping EPM System Products.”](#)

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Uninstalling the Earlier Release of EPM System Products

Oracle recommends that you uninstall earlier releases of EPM System products unless you want to maintain the earlier release environment. During uninstallation, when prompted whether you want to delete all the files and directories in the EPM Oracle home directory, select **No** unless you have moved your data to another location.

Note: If you are upgrading on the existing machine, and you want to uninstall the earlier release, you must uninstall before you install Release 11.1.2.1. (Oracle recommends that you install Release 11.1.2.1 on a new machine.) You cannot uninstall the earlier release of Shared Services after you upgrade to the new release on the same machine.

If you are upgrading FDM on the existing machine, you must uninstall the earlier release before you proceed.

Tip: If you choose not to uninstall the earlier release and you are upgrading on the existing machine, you might need to edit the `PATH` variable to remove all references to the earlier release. This can prevent you from reaching the character limit for the `PATH` variable when you configure.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Installing EPM System Products for an Upgrade

Install EPM System products using EPM System Installer, as described in [Chapter 3, “Installing EPM System Products.”](#)

Note the following about installing EPM System products in an upgrade:

- For each machine, you can install all the products that you plan to host on that machine at one time. For additional requirements for a distributed installation, see [“Installing EPM System Products in a Distributed Environment” on page 94](#).
- When you upgrade, you must install and configure using the same user that was used to install and configure the earlier release.
- Oracle recommends that you install Release 11.1.2.1 on a new machine.
- If you are installing on the same machine as the earlier release, EPM System Installer warns you that the earlier release might no longer work after you install the current release.
- If you are upgrading from a deployment that includes Planning Release 9.2.1 (for `HspJSHome.properties`) or Administration Services with Planning Release 9.2.1 or Release 9.3.3 (for `hbrserver.properties`), during installation, specify the `MIDDLEWARE_HOME` that you created when you replicated Planning data.

Note: To install and configure the Financial Reporting Print Server, see [“Installing Financial Reporting Studio and Financial Reporting Print Server” on page 111](#).

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Configuring EPM System Products in an Upgrade

Caution! Do not proceed with configuration until you have exported Shared Services data from the earlier release. See [“Exporting Shared Services Data from the Earlier Release” on page 183](#).

After you install, use EPM System Configurator to configure EPM System products.

Upgrade configuration notes:

- You must configure Foundation Services first. Foundation Services must be installed and configured for other products to configure successfully.
- In a distributed environment, for Shared Services, perform the **Configure Database** and **Import data from earlier release** tasks on each machine on which Shared Services is installed before configuring any other products. For other products, you perform the import data tasks on only one machine in a distributed environment.

- Configure Essbase and Essbase products next.
- You must perform the **Configure Database** task at the same time as or before you perform the “Deploy to Application Server” task.
- Because you are configuring products one at a time, configure the Web server after each product. (Select the Foundation Services “Configure Web Server” task.) After configuration, restart the Web server and EPM Workspace.
- You must deploy all EPM System products to a single WebLogic domain. The only exception to this requirement is documented in [“Deploying Financial Reporting and Web Analysis on Windows for use with Financial Management”](#) on page 246.
- If you are upgrading multiple instances of Essbase, for each instance that you are upgrading from, you must create a new instance in Release 11.1.2.1. See [“Configuring and Starting Additional Instances of Essbase Server”](#) on page 156.

The following table describes the tasks that you must select in EPM System Configurator and describes the tasks EPM System Configurator performs during upgrade. For details about running EPM System Configurator, see [Chapter 4, “Configuring EPM System Products”](#) or click **Help**.

Note: For all products other than Shared Services, during product database configuration, select **Upgrade existing database to the current release from...** and select a release number. Then, enter connection information for the existing or replicated database.

➤ To launch EPM System Configurator, from the **Start** menu, select **Programs**, then **Oracle EPM System**, then **Foundation Services**, and then **EPM System Configurator**.

Table 33 Required Configuration Tasks During Upgrade

Product	Configuration Tasks	What Happens During Upgrade
All products	Configure a New or Existing EPM Oracle Instance. Typically, if you are installing all products on a single machine, for the first product you configure, you create a new EPM Oracle instance. For each product after that, you modify the existing instance. If you are installing in a distributed environment, create a new instance with a unique name on each machine.	

Product	Configuration Tasks	What Happens During Upgrade
Shared Services	● Configure Common Settings ● Configure Database ● Configure Oracle Configuration Manager ● Configure Web Server ● Deploy to Application Server ● Import data from earlier release During Shared Services database configuration, select Perform first- time configuration of Shared Services database, and then enter connection information for a new database. If you are upgrading from Release 11.1.1.3, and you configured all EPM System products to use one database, you are alerted that pre-existing Shared Services tables have been detected in the database. When prompted to drop and recreate the tables, select Yes. For the Deploy to Application Server configuration task, deploy to a new WebLogic domain. For the Import Data From Earlier Release configuration task, specify the location from which to import Shared Services data. You must specify the full path to <code>hssmigratedata.zip</code>, which is created with the Shared Services Upgrade Utility. Caution! Perform this task only once on a machine. In a distributed environment, perform the Configure Database and Import data from earlier release tasks on each machine on which Shared Services is installed before configuring any other products. When you are done with this step, return to the “Upgrading Checklist” on page 177.	Imports Shared Services data from the earlier release. For more information about this process, see “What Happens During Shared Services Data Import” on page 203. Note: You see applications in EPM Workspace and provisioning information in Shared Services only after a product is reregistered and applications are migrated. You see EPM Workspace preferences upgraded from the earlier release only after you have upgraded all EPM System components and you have started Reporting and Analysis Framework. In addition, users must be provisioned with a Reporting and Analysis role other than IR HTML Viewer or IR WebClient Viewer.

Product	Configuration Tasks	What Happens During Upgrade
Essbase	● Configure Essbase Server On the Configure Essbase Server page, for Full path to application location (ARBORPATH), specify the location of the existing or replicated Essbase data. Note: If you replicated data to a new machine, and if you selected Differently-named disk volumes, table spaces, or ARBORPATH on source and target or Consolidated disk volumes or tablespaces on target by exporting data during data replication, you must run a script immediately after configuring Essbase to update the Essbase security file to reflect the disk volumes on the upgraded system. The Essbase Staging Tool provides a script to update the settings in the security file (<code>essbase.sec</code>): Start the Essbase Server and EPM System services. Navigate to <code>ARBORPATH/app</code> on the machine that is hosting the upgraded Essbase Server and run the following script using MaxL: <pre>%ARBORPATH%/bin/startMaxl.bat -u userName editagtsec.msh</pre> where <code>userName</code> is the Administrator user name to connect to the upgraded Essbase server. The script prompts you to enter the password. Note: <code>editagtsec.msh</code> could be empty in some scenarios. For example, when you launched the Staging Tool, the Staging Tool reports on existing volumes. If no volumes are listed, <code>editagtsec.msh</code> is empty.	Registers applications with Shared Services and upgrades applications. Note: When you upgrade from an earlier release, a backup of the security file for the earlier release is created before the security file is upgraded. The security file backup, <code>Essbase.Bak_preUpgrade</code>, is in <code>ARBORPATH/bin</code>. Unlike the <code>Essbase_timestamp.bak</code> file, which regularly backs up the latest state of Essbase security, this pre-upgrade backup file is kept intact and is not subsequently updated by further operations.
Provider Services	● Deploy to Application Server ● Import Data From Earlier Release ● Configure Web Server (Foundation task) For the Import Data From Earlier Release task, specify the location of the existing or replicated data.	Moves data from the earlier release into the Shared Services Registry. Moves <code>essbase.properties</code> to <code>EPM_ORACLE_INSTANCE/aps/bin</code> and merges its contents with the <code>essbase.properties</code> file installed with Release 11.1.2.1.
Administration Services	● Configure Database ● Deploy to Application Server ● Import Data From Earlier Release ● Configure Web Server (Foundation task) For the Import Data From Earlier Release task, specify the location of the existing or replicated data	Moves data from the earlier release into the Shared Services Registry.

Product	Configuration Tasks	What Happens During Upgrade
Essbase Studio	● Configure Database ● Configure Essbase Studio Server Data File Location ● Configure Web Server (Foundation task) On the Configure Essbase Studio Server Data File Location page, specify the location of the existing or replicated Essbase Studio data.	Upgrades the Essbase Studio catalog and the database. EPM System Configurator performs the following tasks during the upgrade process: 1. Exports metadata from the source catalog to an external xml file (<i>EPM_ORACLE_HOME/tmp/studio_dump.xml</i>). 2. Renames the source catalog tables and constraints by replacing the prefix <i>cp_</i> with the prefix <i>cc_</i>. 3. Creates new catalog tables with the prefix <i>cp_</i>. 4. Imports metadata from <i>studio_dump.xml</i> into the new catalog. 5. Converts metadata objects from the earlier release to the structure for the upgraded release. 6. Deletes <i>studio_dump.xml</i> if the upgrade succeeds. Note: If database configuration fails during upgrade from Release 11.1.1.3, see the <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide</i>. Maintain the Release 11.1.1.3 environment until the upgrade is complete.
Integration Services	● Configure Essbase Integration Services When you are done with this step, return to the “Upgrading Checklist” on page 177.	
Performance Management Architect	● Configure Database ● Deploy to Application Server ● Configure Web Server (Foundation task) ● If you have interface data sources, on the Configure Interface Data Sources page, select Import Data Sources from an old release. No EPM System Configurator pages appear for this task, and you need not enter information. Make sure to perform this task before you create any new interface data sources. When you are done with this step, return to the “Upgrading Checklist” on page 177.	Updates the database. For interface datasources, imports data from the migrated Shared Services data and stores it in the Shared Services Registry.

Product	Configuration Tasks	What Happens During Upgrade
Calculation Manager (for upgrades from Release 11.1.1.3)	● Configure Database ● Deploy to Application Server ● Configure Web Server (Foundation task) When you are done with this step, return to the “Upgrading Checklist” on page 177.	Updates the database.
Reporting and Analysis	● Configure Database ● Deploy to Application Server ● Configure Reporting and Analysis Services ● Configure Web Server (Foundation task) On the Reporting and Analysis Framework Services configuration page, for Repository Directory, specify the location of the existing or replicated data. When you are done with this step, return to the “Upgrading Checklist” on page 177.	Updates Web Analysis application settings. Updates the database.
Planning	● Configure Database ● Deploy to Application Server ● Configure Web Server (Foundation task) When you are done with this step, return to the “Upgrading Checklist” on page 177.	Updates the database. For Planning Release 9.2.1 only, moves the data from <code>HSPJS.properties</code> to the Planning system repository and the file is no longer used. You perform application upgrade later in the upgrade process.
Financial Management	● Configure Database ● Deploy to Application Server ● Configure DCOM ● Configure Application Server ● Configure Application Cluster ● Register Application Servers/Cluster ● Configure Web Server (Financial Management task) ● Upgrade applications from earlier release ● Configure Web Server (Foundation task) You must select Upgrade applications from earlier release. Note that there is no EPM System Configurator page for this task and you need not enter information. Note: Depending on the number and size of applications you are upgrading, this task can take some time. When you are done with this step, return to the “Upgrading Checklist” on page 177.	Upgrades applications by converting database tables, and registers applications with Shared Services. Note: Perform the application upgrade only once, regardless of how many Financial Management application servers are configured.

Product	Configuration Tasks	What Happens During Upgrade
Performance Scorecard	● Configure Database ● Deploy to Application Server ● Configure Attachment Files Location ● Configure Web Server (Foundation task) On the Performance Scorecard Specify directory to store Performance Scorecard files configuration page, specify the location in which to store files. When you are done with this step, return to the “Upgrading Checklist” on page 177.	Updates the database.
Profitability and Cost Management	● Configure Database ● Deploy to Application Server ● Configure Web Server (Foundation task) When you are done with this step, return to the “Upgrading Checklist” on page 177.	Updates the database and reregisters all upgraded Profitability and Cost Management applications with Shared Services.
Strategic Finance	● Configure Data directory ● WebServices Configuration ● Configure Web Server (Foundation task) On the Strategic Finance Configuration configuration page, specify the location of the existing or replicated data. When you are done with this step, return to the “Upgrading Checklist” on page 177.	Updates the database.
Disclosure Management	N/A. Use the Apply Maintenance Release option during installation.	
Financial Close Management	N/A. Use the Apply Maintenance Release option during installation.	
FDM	● Configure Database (for ERP Integrator) ● Deploy to Application Server (for ERP Integrator) ● Configure FDM Web Application ● Configure FDM Server ● Configure Web Server (Foundation task) When you are done with this step, return to the “Upgrading Checklist” on page 177.	Registers FDM with Shared Services. Updates the ERP Integrator database. You complete configuration in FDM and upgrade applications later in the upgrade process.

What Happens During Shared Services Data Import

During configuration, with the Foundation **Import data from earlier release** task, EPM System Configurator extracts the contents of `hssmigratedata.zip` and imports the data to Shared Services Release 11.1.2.1.

EPM System Configurator imports the following data:

- Security (including application roles)
- Projects and Application IDs
- Performance Management Architect interface datasource tables
- Taskflow information
- Audit information (for 11.1.1.3 only)
- `CSS.xml`

Logs related to the import process are written to `EPM_ORACLE_INSTANCE/diagnostics/upgrade/hss_upgrade_ps1.log` and to the console. If there are any errors during the import process, you can rerun just the **Import data from earlier release** task.

EPM System Configurator performs the following tasks:

- Updates `CSS.xml` (for 9.2.1 and 9.3.3) to replace all DN-based identity attributes to GUID-based attributes and imports them to the Shared Services Registry.
- Updates all DN-based identities to their corresponding GUID-based identities.
- Moves Native Directory to last in the search order.
- Imports projects (application groups) into the Shared Services Registry.
- Imports application IDs into the Shared Services Registry. Note that application nodes are created but are not visible until the applications are registered later in the upgrade process.
- Imports the Performance Management Architect datasource file `InterfaceTables.instance` on a temporary basis for use during Performance Management Architect configuration.

If you are moving task flows, note that task flow permissions are moved to roles as follows:

Table 34 How permission types are moved to roles

Permission Type	Role Name
Grant Read	Run Taskflow
Grant Write or Grant Manage	Manage Taskflow
Deny Read, Deny Write, or Deny Manage	No mapping
None	No mapping

Upgrading a Distributed Deployment of Reporting and Analysis

If you are upgrading a distributed deployment of Reporting and Analysis, note that the distributed configuration is not automatically replicated in the upgrade as it was in earlier releases when you upgraded. You must set up the distributed configuration in the Release 11.1.2.1

environment. Use the Upgrading Checklist, but repeat the installation and configuration steps as needed, as described in the following procedure.

- To configure a distributed deployment of Reporting and Analysis in an upgrade scenario:
 - 1 Install and configure the first host. During configuration with EPM System Configurator, for the product database configuration, select **Upgrade existing database to the current release from...** and select a release number. Then, enter connection information for the existing or replicated database.
 - 2 For a subsequent host that already existed in the previous deployment, install and configure the host. During configuration with EPM System Configurator, for the product database configuration, select **Upgrade existing database to the current release from...** and select a release number. Then, enter connection information for the existing or replicated database.
 - 3 To add a host that did not exist in the previous deployment, install and configure on the new host. During configuration with EPM System Configurator, for the product database configuration, select **Connect to a previously configured database**. Then, enter connection information for the existing or replicated database.

Starting EPM System Services

Start EPM System services before you proceed. See [Chapter 8, “Starting and Stopping EPM System Products.”](#)

When you are done with this step, return to the [“Upgrading Checklist” on page 177.](#)

Validating the Installation

Use EPM System Diagnostics to validate the installation. See [Chapter 9, “Validating the Installation and Verifying Deployment.”](#)

Performing PostConfiguration Tasks

You must perform any required product-specific postconfiguration tasks before you proceed. See [Chapter 7, “Performing Postconfiguration Tasks.”](#)

When you are done with this step, return to the [“Upgrading Checklist” on page 177.](#)

Updating References to a Rehosted Environment

Subtopics

- [Updating References to a Rehosted Essbase Server](#)
- [Updating Provider Services References to a Rehosted Essbase Server](#)
- [Updating Administration Services References to a Rehosted Essbase Server or Provider Services Server](#)
- [Updating Essbase Studio References to a Rehosted Environment](#)
- [Updating Reporting and Analysis References to a Rehosted Server Environment](#)
- [Updating Performance Management Architect References to a Rehosted Server Environment](#)
- [Updating Planning References to a Rehosted Server Environment and Upgrading Applications](#)
- [Updating Business Rules References to a Rehosted Essbase or Planning Server](#)
- [Updating Profitability and Cost Management References to a Rehosted Essbase Server](#)
- [Updating Strategic Finance References to a Rehosted Essbase Server or Financial Management Server](#)
- [Updating Performance Scorecard References to a Rehosted Essbase Server](#)
- [Updating Integration Services References to a Rehosted Server Environment](#)

If you are upgrading by installing EPM System products on a new host machine, you need to update references for some products to reflect the new host name and port number. Perform the rehosting steps for Essbase first. Make sure EPM System services are started before you proceed.

Updating References to a Rehosted Essbase Server

Subtopics

- [Mapping Essbase Server Host Names to Cluster Names](#)
- [Updating Internal Essbase References to a Rehosted Essbase Server](#)

If the Essbase Server host and port has changed since the earlier release, you must update references to the Essbase Server within Shared Services Registry (to map the server name to a cluster name), within Essbase, and within other products that use Essbase as a data source.

Note: Some products have additional steps if other servers have been rehosted.

Update the Essbase Server host information in the following places:

Table 35 Updating References to the Essbase Server Host

Essbase Server Host Reference	For Information on How to Update
Map Essbase Server names to cluster names. You must perform this step before you update references for other products.	“Mapping Essbase Server Host Names to Cluster Names” on page 207

Essbase Server Host Reference	For Information on How to Update
Update Essbase Server references within Essbase. You must perform this step before you update references for other products.	“Updating Internal Essbase References to a Rehosted Essbase Server” on page 208
For products that use Essbase as a data source, if the Essbase Server host or port has changed since the earlier release, update references to the Essbase Server. Perform these steps after you install and configure each product. Note: The steps for Performance Management Architect are required even if Essbase Server has not been rehosted.	● Provider Services – “Updating Provider Services References to a Rehosted Essbase Server” on page 209 ● Administration Services – “Updating Administration Services References to a Rehosted Essbase Server or Provider Services Server” on page 209 ● Business Rules – “Updating Business Rules References to a Rehosted Essbase or Planning Server” on page 219 ● Essbase Studio – “Updating Essbase Studio References to a Rehosted Environment” on page 210 ● Reporting and Analysis – “Updating Reporting and Analysis References to a Rehosted Server Environment” on page 214 ● Performance Management Architect – “Updating Performance Management Architect References to a Rehosted Server Environment” on page 215 ● Planning – “Updating Planning References to a Rehosted Server Environment and Upgrading Applications” on page 216 ● “Updating Business Rules References to a Rehosted Essbase or Planning Server” on page 219 ● Profitability and Cost Management – “Updating Profitability and Cost Management References to a Rehosted Essbase Server” on page 220 ● Strategic Finance – “Updating Strategic Finance References to a Rehosted Essbase Server or Financial Management Server” on page 220 ● Performance Scorecard – “Updating Performance Scorecard References to a Rehosted Essbase Server” on page 221

Mapping Essbase Server Host Names to Cluster Names

To simplify the rehosting process for products that use Essbase as a data source, perform this task to map the server host name to the cluster name. This allows other EPM System products to connect to Essbase by cluster name.

You must perform this step before you update references for other products. This step adds search-and-replace host pairs to the Shared Services Registry that other products use to update their Essbase host environments.

Note: Performance Management Architect requires this step even if the Essbase Server has not been rehosted.

➤ To map Essbase Server host names to cluster names:

1 Add the `ApsResolver` property to `essbase.cfg` and `essbase.properties`.

See [“Enabling Client Lookup by Cluster Name” on page 254](#).

2 From a command prompt on the machine hosting Shared Services, navigate to the following directory:
EPM_ORACLE_INSTANCE/bin/upgrades.

3 Run the following script:

```
updateEssbaseServer oldEssbaseServerHost ClusterNameForNewHost
```

where *oldEssbaseServerHost* is a fully qualified *server name:port*.

Tip: The default cluster name is *EssbaseCluster-1*. The cluster name is case sensitive.

The utility stores the mapping information between the earlier release of Essbase Server and the new logical cluster name in the Shared Services Registry.

4 Repeat for each Essbase Server instance.

Updating Internal Essbase References to a Rehosted Essbase Server

You must map Essbase Server names to cluster names before you perform this step. See [“Mapping Essbase Server Host Names to Cluster Names” on page 207](#).

If the Essbase Server host has changed since the earlier release, you must update internal references to the host. This step updates partition definitions and alias locations.

► To update internal references to a rehosted Essbase Server:

1 From a command prompt on the machine hosting Essbase, navigate to the following directory:

```
EPM_ORACLE_INSTANCE/bin/upgrades.
```

2 Run the following script, and then enter the administrator password when prompted:

```
EssbaseUpdateEssbaseServer.bat | sh newHost:port userName
```

Where *newHost* is any alias or fully qualified name or IP address for the upgraded machine and *userName* is an Essbase administrator user provisioned in Release 11.1.2.1. The default port is 1423.

The utility updates the host for all location aliases and partition definitions for all Essbase applications.

3 Repeat for each Essbase Server instance.

Review the log file, *EPM_ORACLE_INSTANCE/diagnostics/logs/essbase/EssbaseRehost.log*, for details of the script actions.

If you are configuring all Essbase products at one time, continue to the next section. Otherwise, when you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Updating Provider Services References to a Rehosted Essbase Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server” on page 206](#).

If the Essbase Server host has changed since the earlier release, you must make updates so that Provider Services recognizes the new Essbase data source.

► To update internal references to a rehosted Essbase Server:

1 From a command prompt, navigate to the following directory: `EPM_ORACLE_INSTANCE/bin/upgrades`.

2 Run the following script:

```
ApsUpdateEssbaseServer.bat | sh
```

Execute this utility once.

If you are configuring all Essbase products at one time, continue to the next section. Otherwise, when you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

To update internal references to a rehosted Oracle BI EE Server, see the *Oracle Hyperion Provider Services Administration Guide*.

Updating Administration Services References to a Rehosted Essbase Server or Provider Services Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server” on page 206](#).

If the Essbase Server host and port have changed since the earlier release, you must make updates so that Administration Services recognizes the new Essbase data source. After upgrading, review and update the list of servers in the Administration Services Console.

► To update Administration Services references to a rehosted Essbase Server:

1 Log in to the Administration Services Console.

The Essbase Servers from the previous installation are listed.

2 Review the list of Essbase Servers.

3 Add, update, or delete servers as needed for the new deployment environment.

When you add a new server, the **Add Essbase Server** dialog box displays a list of available servers that are in the upgraded installation, which it reads from the Shared Services Registry.

Delete previous Essbase hosts from the Enterprise tree.

For details, see *Administration Services Online Help*.

If the Provider Services Server host and port have changed since the earlier release, you must make updates so that Administration Services recognizes the new location.

➤ To update Administration Services references to a rehosted Provider Services Server:

1 Log in to the Administration Services Console.

The Provider Services Servers from the earlier installation are listed.

2 Review the list of servers.

3 Add, update, or delete servers as needed for the new deployment environment.

When you add a new server, in the **Add Provider Server** dialog box, enter the Provider hosts for the new installation: click **URL** (the **Provider URL** box is updated), and ensure that the port is correct. From the **Authenticating Essbase Server** menu select the active **Essbase** and then click **OK**.

4 Delete previous Provider Services Server hosts from the Provider Servers tree.

If you are configuring all Essbase products at one time, continue to the next section. Otherwise, when you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Updating Essbase Studio References to a Rehosted Environment

Subtopics

- [Updating Essbase Studio References to a Rehosted Essbase Server](#)
- [Updating Cube Linkages](#)
- [Updating Essbase Studio References to a Rehosted Performance Management Architect Server or to Text Files Used as Data Sources](#)

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server ” on page 206](#).

After upgrade, Essbase Server connections and deployed cubes are affected by changes in host, port, or data encryption information for the underlying Essbase Server instances or clusters, or for any Essbase Studio Server instances.

You must update references to those server instances and clusters in Essbase Studio.

Table 36 Updating References to the Essbase Server Host and the Essbase Studio Host

Task	Reference
If Essbase Server host and port have been moved to a new location, update Essbase Studio references to the Essbase Server.	“Updating Essbase Studio References to a Rehosted Essbase Server” on page 211
If the Essbase Studio Server host and port have been moved to a new location and you have deployed applications that point to the earlier release Essbase Studio Server location, update the cube linkage of those deployed applications to point to the new Essbase Studio Server instance.	“Updating Cube Linkages” on page 212

Task	Reference
If Performance Management Architect has been moved to a new location, then for all Performance Management Architect data source connections that point to the earlier release location, edit the connection properties to reflect the new server location.	“Updating Essbase Studio References to a Rehosted Performance Management Architect Server or to Text Files Used as Data Sources” on page 213
If text files were moved to a non-default directory, edit the connection properties for any text file connections to point to the new location.	“Updating Essbase Studio References to a Rehosted Performance Management Architect Server or to Text Files Used as Data Sources” on page 213

Updating Essbase Studio References to a Rehosted Essbase Server

► To update references to a rehosted Essbase Server instance or cluster:

1 In Essbase Studio Console, select **Tools**, and then **Rehost Essbase Connections**.

2 In **Rehost Essbase Connections**, select the connection to rehost under **Essbase connections**.

The old cluster name or Essbase host and port number, and, if applicable, data encryption method, are displayed under **Host/Port/Encryption in Catalog**.

3 Under **New Host/Port/Encryption**, enter the new cluster name or new host name, port number, and, if applicable, data encryption method.

Note: For Essbase Server clusters, only the cluster name is required. The port number is not required. By default, the new cluster name is displayed in the **New Host/Port/Encryption** column.

Use the following syntax:

- For an Essbase Server instance, no data encryption, enter:
host:port
- For an Essbase Server instance, with data encryption, enter:
host:port:ssl
- For an Essbase Server cluster, no data encryption, enter:
cluster_name

4 **Optional:** Click **Test Connection** to validate the entry that you made under **New Host/Port/Encryption**.

Note: Essbase Studio does not validate entries as you enter them. You must click **Test Connection** to validate the information that you entered.

5 Select an **Update Deployment History** option for the currently selected Essbase Server connection:

- **Update the host name and port number for all deployment history**—Replaces all old Essbase Server host and port references to the new host and port that you specified.

This is the default option.

- **Replicate the last successful deployment history and update the copy only**—Makes a copy of the last successful deployment history listing, and then updates the copy with the new host and port information, and the date and time of the rehosting.

Tip: When selecting the **Replicate** option, after the update is complete, each rehosted Essbase model displays twice in the Metadata Navigator: once with the old *host:port* information and once with the new *host:port* and, if required, data encryption information.

Note: Deployment history is updated only for successfully rehosted Essbase Server connections.

6 Click Update.

7 For the rehosting status of each Essbase Server connection that is rehosted, check the Update Status column in the Rehost Essbase Connections dialog box.

If the rehost is successful, the **Host/Port/Encryption in Catalog** column is updated with the new cluster or host and port information and, if applicable, encryption information. If the rehost fails, an error message is displayed.

Note: If other Essbase Server connections have the same old *host:port* setting, rehosting one instance rehosts all other instances.

Updating Cube Linkages

➤ After upgrade or if Essbase Studio has moved to another server, to update the cube linkage for cubes built using Essbase Studio:

- 1 In Essbase Studio Console, select Tools, and then Update Cube Linkage.**
- 2 Select Update all Essbase applications and databases to link to the current Essbase Studio Server (all Essbase instances must be started).**

All Essbase applications and databases will be linked to the Essbase Studio Server to which you are currently connected.

Note: All Essbase instances or clusters must be running for the cube linkage update to take effect.

- 3 Optional:** To keep all Essbase applications running after the update, clear the **Stop all Essbase applications after the update** check box.

The default is to stop all Essbase applications after update.

4 Click Update.

A message indicates that the cube linkage update is successful.

If unsuccessful, an error message shows the details.

5 To exit, click Close.

Updating Essbase Studio References to a Rehosted Performance Management Architect Server or to Text Files Used as Data Sources

If Performance Management Architect has been moved to a new host or port from the earlier release installation, then for all Performance Management Architect data source connections that point to the earlier release location, edit the connection properties to reflect the new server location. If text files used as data sources have moved to a non-default location, edit the connection properties.

You edit the data source connection information in Essbase Studio.

➤ To edit the properties of a data source:

- 1 In Essbase Studio Console, from the **Source Navigator**, select the **Data Sources** tab.
- 2 Under **Data Sources** in the physical tree, right-click the data source to edit and select **Properties**.
- 3 Complete the following tasks in the **Parameters** section of the dialog box.

Dimension Server sources:

- a. In **Server Name**, modify the name of the computer where Performance Management Architect resides.
- b. To modify the port number, ensure that the **Default** check box next to **Port** is cleared, and enter the new port number.
- c. Modify the **User Name** and **Password** for this instance of Performance Management Architect.

Text file sources:

- a. To modify the **Location** of the text file data source, click **Browse**.
- b. In the **Text File Location** dialog box, select the directory that contains the text file data source you want to access.

Note: You can select only one directory per data source. Essbase Studio does not support text files from different subdirectories within the same directory.

- c. Review the files listed under **Contents of selected directory** to ensure that this is the text file data source you want to select.

- 4 Click **Apply**, and then click **OK**.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Updating Reporting and Analysis References to a Rehosted Server Environment

Subtopics

- [Updating Financial Reporting References to a Rehosted Essbase Server](#)
- [Updating Web Analysis References to a Rehosted Essbase Server](#)
- [Updating References to a Rehosted Production Reporting Server](#)

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server”](#) on page 206.

Table 37 Upgrade Tasks for Reporting and Analysis

Upgrade Task	Reference
Financial Reporting - If the Essbase Server host and port have changed since the earlier release, make updates so that Financial Reporting recognizes the new Essbase data source.	“Updating Financial Reporting References to a Rehosted Essbase Server” on page 214
Financial Reporting - Update Provider Services data sources if the Provider Services host has changed.	In EPM Workspace, from the Tools menu, select Database Connection Manager , select the database connection and then click Edit to enter new connection information.
Web Analysis - If the Essbase Server host and port have changed since the earlier release, make updates so that Web Analysis recognizes the new Essbase data source.	“Updating Web Analysis References to a Rehosted Essbase Server” on page 215
If the Production Reporting Server has moved to a new server for this release, update references to the new server.	“Updating References to a Rehosted Production Reporting Server” on page 215

Updating Financial Reporting References to a Rehosted Essbase Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server”](#) on page 206.

If the Essbase Server host and port has changed since the earlier release, update references to the Essbase Server host within Financial Reporting where Essbase is used as a data source.

Before you proceed, make sure the Financial Reporting service is started.

► To update Financial Reporting references to a rehosted Essbase Server:

- 1 From a command prompt, navigate to the following directory: `EPM_ORACLE_INSTANCE/bin/upgrades`.
- 2 Run the following script:
`FRUpdateEssbaseServer.bat | .sh`

Updating Web Analysis References to a Rehosted Essbase Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server” on page 206](#).

If the Essbase Server host and port has changed since the earlier release, update references to the Essbase Server host within Web Analysis where Essbase is used as a data source.

➤ To update Web Analysis references to a rehosted Essbase Server:

1 From a command prompt, navigate to the following directory: `EPM_ORACLE_INSTANCE/bin/upgrades`.

2 Run the following script:

```
WebAnalysisUpdateEssbaseServer.bat | sh
```

Updating References to a Rehosted Production Reporting Server

If you installed Production Reporting on a different host than the earlier release, run the `reshostSQRConfig` utility to remap the SQR engine-related metadata from the earlier release host to the new host in the database. You do not need to run this utility if you installed Production Reporting on the same host as the earlier release.

Shut down all Reporting and Analysis Framework services before running the utility.

➤ To update references to a rehosted Production Reporting Server:

1 From a command prompt, navigate to the following directory: `EPM_ORACLE_INSTANCE/bin/ReportingAnalysis/SDK`.

2 Run the following script:

```
reshostSQRConfig.bat | sh host1 host2
```

where *host1* is the host name for the machine from which you are upgrading, and *host2* is the host name for the upgraded machine.

The script updates tables to reflect the new host.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Updating Performance Management Architect References to a Rehosted Server Environment

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server” on page 206](#).

Even if Essbase Server has not been rehosted, you must perform the procedure in [“Mapping Essbase Server Host Names to Cluster Names” on page 207](#).

Table 38

Upgrade Task	Reference
Make updates so that Performance Management Architect recognizes the new Essbase Server location.	“Updating Performance Management Architect References to Essbase Server” on page 216
If the interface datasource has been rehosted since the earlier release, run EPM System Configurator to configure the interface datasource. (Select Configure Interface Datasource from the Performance Management Architect configuration tasks.) During configuration, point to the new database host. For example, if you are using Performance Management Architect with ERP Integrator, and the ERP Integrator host and port have changed since the earlier release, update ERP Integrator connection information in the Performance Management Architect data source that is associated with the ERP Integrator schema.	“Configure Interface Datasources (Optional)” on page 150

Updating Performance Management Architect References to Essbase Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server” on page 206](#).

Make updates so that Performance Management Architect recognizes the Essbase Server cluster name. This step is required even if the Essbase Server has not been rehosted.

► To update Performance Management Architect references to the Essbase Server:

- 1 From the machine hosting the Dimension Server, from a command prompt, navigate to the following directory: `EPM_ORACLE_INSTANCE/bin/upgrades`.
- 2 Run the following script:

```
EPMAUpdateEssbaseServer.bat
```

The script indicates the status of application and notes when the process is complete.

Updating Planning References to a Rehosted Server Environment and Upgrading Applications

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server” on page 206](#).

Use the Planning Upgrade Wizard to update references to rehosted data sources and to upgrade Planning applications. For example, if the Essbase Server host and port have changed since the earlier release, you must update data sources and update mappings from Planning applications to reporting applications. If the relational data source has changed, you must update data source connections. The Planning Upgrade Wizard enables you to update multiple data sources and reporting applications simultaneously. The Upgrade Wizard also upgrades applications created in Performance Management Architect or Classic Planning.

Caution! You must update references to rehosted data sources before you upgrade applications.

Note: Before updating references to data sources, ensure that the Essbase server and the relational database are running.

➤ To update references to data sources and upgrade applications:

- 1 From EPM Workspace, select **Navigate**, then **Administer**, then **Classic Application Administration**, **Planning Administration** and then click **Upgrade Wizard**. Log in as an administrator user that has Dimension Editor or Application Creator role.
- 2 On the **Update Data Sources** page, review the relational database information and the Essbase server information for each Planning data source. If the Essbase server host and port have changed during upgrade, or if the relational database has moved to a new host, update the information.
 - To update multiple relational databases with the same information:
 - a. On the bottom of the page, select the data sources to which to apply relational database updates.
 - b. Under **Update Relational Information**, enter the new database information.
 - c. Click **Apply to Selected**.
 - To update multiple Essbase servers with the same information:
 - a. On the bottom of the page, select the data sources to which to apply Essbase information updates.
 - b. Under **Update Essbase Information**, enter the new Essbase server information.
Note that you can specify the Essbase cluster name.
 - c. Click **Apply to Selected**.
 - To update each data source individually:
 - a. On the bottom of the page, select the data sources to which to apply the updates.
 - b. Enter the new information for each data source.
- 3 Choose an option:
 - Click **Reset** to undo the updates.
 - Click **Validate** to test the connections to the selected data sources, and fix any issues that are noted.
 - Click **Save** to save the updates to the selected data sources.
- 4 Click **Next** to proceed to the **Upgrade Applications** page.
- 5 On the **Upgrade Applications** page, review the **Relational Server** and **Essbase Server** details and confirm that they are correct. If the details are not correct, click **Previous** and make the corrections. Then select one or more applications and click **Upgrade**, and then click **OK** to proceed.

The list shows both Classic applications and Performance Management Architect applications. Applications that have already been upgraded are not available. The **Status** column indicates the upgrade status of each application.

The selected applications are upgraded and reregistered with Shared Services. For applications created in Release 9.2.1 or 9.3.3, the Upgrade Wizard upgrades identities in the Planning schema. After upgrade, applications are associated with the same project that they were associated with before upgrading. Any applications that were not associated with a project are assigned to the default Shared Services project.

The administrator user that is upgrading the applications is assigned the Provisioning Manager role for those applications.

A message shows the pass and failure status. The **Status** column shows the details for each application. The logs show details for the upgrade for all applications.

Upgrade log files are created for each upgraded application in *EPM_ORACLE_INSTANCE/diagnostics/logs/planning/PlanningAppUpgradeLog_application_name.txt*.

6 Click Next.

7 For updates from Release 11.1.2 only: On the Update Reporting Essbase Servers page, review or update the Essbase server information for reporting applications.

Only applications that have already been upgraded and that have reporting applications created on an Essbase server (other than the default Essbase server) are listed.

- To update multiple reporting applications with the same information:
 - a. On the bottom of the page, select the applications to which to apply the updates.
 - b. Under **Update Reporting Essbase Information**, enter the new Essbase server information.
 - c. Click **Apply to Selected**.
- To update each reporting application individually:
 - a. On the bottom of the page, select the reporting applications to which to apply the updates.
 - b. Enter the new Essbase server information for each application.

8 Choose an option:

- Click **Reset** to undo the updates.
- Click **Validate** to test the connections to the selected Essbase servers, and fix any issues that are noted.
- Click **Save** to save the updates to the selected Essbase servers.

9 Click Cancel.

Note: If you do not see the updates reflected in the Planning application, stop and then restart the Planning server.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Updating Business Rules References to a Rehosted Essbase or Planning Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server ” on page 206](#).

If the Essbase or Planning server was rehosted, update the Business Rules connection information against which rules and sequences are launched. This task is required any time the Essbase or Planning server is hosted on a new computer (for example, after an upgrade).

► To update Business Rules references to a rehosted Essbase or Planning server:

1 From the Administration Services Console, from the Oracle Hyperion Business Rules menu, select **Administration, and then **Update Connections**.**

2 Select the connection type — **Essbase or **Planning** — from the **Server Type** list.**

For Planning, the list includes the active Planning servers in the rehosted or upgraded environment. A Planning server is listed only after you have logged in to the Planning application.

3 From the bottom portion of the screen, select the server or servers that you want to modify.

You can also select **Select All** or **Deselect All**.

4 Specify the new server name, and click **Apply to Selected.**

Enter the server name as a Provider Services URL, as an Essbase cluster name, or in the format *host:port*. *Port* is optional; if you do not specify it, the default is used. The server name is not validated, so make sure you enter the name correctly.

Note: If you want to revert to the last saved values, click **Reset**. You cannot reset values after you click **Save**.

5 Click **Save, and then click **OK** when prompted to continue.**

The time required to make the changes depends on the number of rules. During this process, business rules, including security that is associated with the server, are updated to refer to the new server.

If you want to revert to your last saved state, click **Reset**.

6 Click **Close to close the Confirmation dialog box.**

7 Repeat these steps for each server that was rehosted.

8 When you are finished, click **Close.**

9 Restart the Planning and Administration Services servers.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Updating Profitability and Cost Management References to a Rehosted Essbase Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server”](#) on page 206.

If the Essbase Server host and port have changed since the earlier release, make updates so that Profitability and Cost Management recognizes the new location.

► To update Profitability and Cost Management references to a rehosted Essbase Server:

- 1 From a command prompt, navigate to the following directory: `EPM_ORACLE_INSTANCE/bin/updates`.
- 2 Run the following script:

```
HPMUpdateEssbaseServer.bat
```

When you are done with this step, return to the [“Upgrading Checklist”](#) on page 177.

Updating Strategic Finance References to a Rehosted Essbase Server or Financial Management Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server”](#) on page 206.

If the Essbase Server host and port have changed since the earlier release, make updates so that Strategic Finance recognizes the new location. This procedure is also required if the Financial Management Server has changed since the earlier release.

► To update Strategic Finance references to a rehosted Essbase Server or Financial Management Server:

- 1 In Strategic Finance, from the **Server** menu, select **Update Connections**.
The **Update Connections** dialog box displays all of the batches and maps that exist on the Strategic Finance Server.
- 2 From the **Connection Type** list, select the appropriate connection type.
- 3 Select the batch or map items related to a rehosted server, enter the new server name, and then click **Update Selected**.
- 4 Repeat these steps for each rehosted server and its associated batch or map items.

When you are done with this step, return to the [“Upgrading Checklist”](#) on page 177.

Updating Performance Scorecard References to a Rehosted Essbase Server

You must perform Essbase Server rehosting steps before you perform this step. See [“Updating References to a Rehosted Essbase Server” on page 206](#).

If the Essbase Server host and port has changed since the earlier release, update references to the Essbase Server host within Performance Scorecard where Essbase is used as a data source.

➤ To update Performance Scorecard references to a rehosted Essbase Server:

- 1 In Performance Scorecard, select **Administration**, and then **Data Source List**.
- 2 Select the name of the external data source and then click **Edit**.
- 3 Select each tab to change general settings and required dimension mappings, and then click **Save**.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Updating Integration Services References to a Rehosted Server Environment

You must perform the following upgrade tasks for Integration Services.

Table 39 Upgrade Tasks for Integration Services

Upgrade Task	Reference
If the Integration Services Server host has changed since the earlier release (for example if you upgraded to a new machine), redefine the Integration Services ODBC DSNs on the machine hosting the new installation using the same names.	See the <i>Oracle Essbase Integration Services System Administrator's Guide</i> for details.
For Integration Services-deployed applications, update drill-through to point to the new Integration Server location. This ensures that the application outline files are updated with the new Integration Server connection information.	“Specifying an Alternate Integration Server for Drill-Through Reports” on page 221

Specifying an Alternate Integration Server for Drill-Through Reports

For already-deployed Essbase applications, for each OLAP metaoutline, perform the following procedure.

➤ To specify an alternate Integration Services server for drill-through reports:

- 1 In the OLAP Metaoutline main window, select a metaoutline name.
- 2 Right-click the metaoutline name and from the menu, select **Properties**, and then select the **Drill-Through Reports** tab.
- 3 In the **Alternate Integration Server** text box, enter the machine name and port number (separated by a colon) of the new Integration Server instance that is now used for executing drill-through reports.

If you are using Integration Server on the default port, you do not need to specify the port number.

4 Click OK.

You must perform a member load or select **Update Drillthrough Data** from the **Outline** menu after making these changes.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Upgrading Applications from the Earlier Release to the Current Release

If you have not already done so, upgrade applications for the following products from the earlier release to the current release:

- FDM, using the Schema Update Utility. See the *Oracle Hyperion Financial Data Quality Management Configuration Guide* for information about upgrading FDM applications.
- Planning, using the Upgrade Wizard. See [“Updating Planning References to a Rehosted Server Environment and Upgrading Applications” on page 216](#). Note that if the Essbase Server host has changed since the earlier release, you also use the Upgrade Wizard to update references to data sources before you upgrade applications.

Applications for the following products are upgraded automatically:

- Essbase applications are updated automatically during configuration with EPM System Configurator.
- Financial Management applications are upgraded during configuration with EPM System Configurator (during database configuration).
- Profitability and Cost Management applications are upgraded during configuration with EPM System Configurator.

Performing Additional Product-Specific Upgrade Tasks

Subtopics

- [Performance Management Architect Upgrade Tasks](#)
- [Essbase Upgrade Tasks](#)
- [Essbase Studio Upgrade Tasks](#)
- [Reporting and Analysis Upgrade Tasks](#)
- [Financial Management Upgrade Tasks](#)
- [Strategic Finance Upgrade Tasks](#)
- [ERP Integrator Upgrade Tasks](#)

Performance Management Architect Upgrade Tasks

Table 40 Performance Management Architect Upgrade Tasks

Upgrade Task	Reference
To ensure that Performance Management Architect displays correctly after upgrading, have all users delete temporary internet files in Internet Explorer.	
If needed, provision users with the new EPMA Admin role. For example, this role is required to run Application Diagnostics.	<i>Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide</i> or the <i>Oracle Hyperion Enterprise Performance Management System User and Role Security Guide</i> .
Review differences in default property values from earlier versions and if necessary set new property values.	<i>Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide</i>
Because new validations were added in this release, applications that validated successfully in an earlier release might not validate in the current release. Review and resolve validation errors and warnings. To validate each application, right-click the application in the Application Library and select Validate . Validation errors are reported in the Job Console.	<i>Oracle Hyperion Enterprise Performance Management Architect Administrator's Guide</i>
After upgrading, applications might display as “Out of sync with deployment.” Redeploy all out-of-sync applications. All applications should have the status “In sync with deployment” before proceeding.	

When you are done with these steps, return to the [“Upgrading Checklist” on page 177](#).

Essbase Upgrade Tasks

Subtopics

- [Importing Essbase Data and Linked Reporting Objects](#)
- [Manually Import Linked Reporting Objects](#)

Perform the following upgrade tasks for Essbase.

Table 41 Essbase Upgrade Tasks

Upgrade Task	Reference
If you upgraded to a new machine, redefine the Essbase ODBC DSNs on the machine hosting the new installation.	
If you upgraded to a new machine, specify any JAVA options on the new machine either as environment variables (Windows) or through <code>hyperionenv.doc</code> (UNIX).	
If you replicated data to a new machine, and if you selected Consolidated disk volumes or tablespaces on target by exporting data , run a script to import Essbase data and linked reporting objects.	“Importing Essbase Data and Linked Reporting Objects” on page 224
If the upgraded application has more than 127 linked reporting objects, manually import the linked reporting objects.	“Manually Import Linked Reporting Objects” on page 224
Oracle recommends that you make a backup of the applications. This ensures that the backup is of the upgraded format.	

When you are done with these steps, return to the [“Upgrading Checklist” on page 177](#).

Importing Essbase Data and Linked Reporting Objects

If you replicated data to a new machine, and if you selected **Consolidated disk volumes or tablespaces on target by exporting data** during data replication, you must run a script to import the Essbase data and linked reporting objects on the upgraded system. The Essbase Staging Tool provides a script to perform this task.

➤ To import data and linked reporting objects on the upgraded machine:

Navigate to the export data directory you defined during data replication on the machine that is hosting the upgraded Essbase Server and run the following script using MaxL:

```
%ARBORPATH%/bin/startMaxl.bat -u userName importdata.msh
```

where *userName* is the Administrator user name to connect to the upgraded Essbase server. The script prompts you to enter the password.

Manually Import Linked Reporting Objects

If the upgraded application has more than 127 linked reporting objects, manually import the linked reporting objects.

➤ To import linked reporting objects:

- 1 Start Essbase Server.
- 2 Run the following MaxL command to import the linked reporting object data from the earlier release backup directory: (The Staging Tool replicated the linked reporting objects with the rest of the Essbase data.)

```
IMPORT database DBS-NAME LRO from server directory 'directoryName';
```

For example:

```
MAXL> IMPORT database Sample.Basic LRO from server directory  
'Sample-Basic-V1';
```

Essbase Studio Upgrade Tasks

The following are tasks for upgrading Essbase Studio to Release 11.1.2.1.

Table 42 Essbase Studio Upgrade Tasks

Task	Reference
Starting with release 11.1.2, the template for drill-through to FDM URLs is changed. If you are upgrading from release 11.1.1.3 to 11.1.2.1, update any drill-through reports to FDM created in Essbase Studio. The URLs for these reports should be changed to use the new template.	"Sample FDM URL Template" in the <i>Oracle Essbase Studio User's Guide</i>

Reporting and Analysis Upgrade Tasks

Subtopics

- [Configuring Reporting and Analysis Framework Service Properties](#)
- [Configuring Web Application Properties](#)
- [Importing DAS Data Sources](#)
- [Updating EPM Workspace Custom Login Information](#)
- [Assigning New Interactive Reporting Roles](#)
- [Production Reporting Upgrade Tasks](#)

Perform the following upgrade tasks for Reporting and Analysis.

Table 43 Upgrade Tasks for Reporting and Analysis

Upgrade Task	Reference
Configure Reporting and Analysis Framework Service properties.	"Configuring Reporting and Analysis Framework Service Properties" on page 226
Configure Reporting and Analysis Framework Web application properties.	"Configuring Web Application Properties" on page 226
Import DAS datasources.	"Importing DAS Data Sources" on page 226

Upgrade Task	Reference
If any custom login changes existed, update them using Shared Services Console.	“Updating EPM Workspace Custom Login Information” on page 227
Assign new roles “IR WebClient Viewer” and “IR HTML Viewer” to allow users to open BQY documents or job outputs.	“Assigning New Interactive Reporting Roles” on page 227
Update Production Reporting Servers.	“Production Reporting Upgrade Tasks” on page 227

Configuring Reporting and Analysis Framework Service Properties

When you upgrade, Reporting and Analysis Framework Service properties from the earlier release are not retained.

- To configure Reporting and Analysis Framework Service properties:
 - 1 In EPM Workspace, select **Navigate**, then **Administer**, then **Reporting and Analysis**, and then **Services**.
 - 2 Right-click a service, select **Properties**, review the property settings, and reset them if needed.

See the *Hyperion Reporting and Analysis Framework Administrator’s Guide* for more information.

Configuring Web Application Properties

When you upgrade, Reporting and Analysis Framework Web application properties from the earlier release are not retained.

- To configure Reporting and Analysis Framework Web application properties:
 - 1 In EPM Workspace, select **Navigate**, then **Administer**, then **Reporting and Analysis**, and then **Web Applications**.
 - 2 Right-click a Web application, select **Properties**, review the property settings, and reset them if needed.

See the *Hyperion Reporting and Analysis Framework Administrator’s Guide* for more information.

Importing DAS Data Sources

- To import DAS data sources:
 - 1 Open the **Services** section of EPM Workspace (select **Navigate**, then **Administer**, then **Reporting and Analysis**, and then **Services**).
 - 2 In the **Services** tab, select an Interactive Reporting Data Access service and click .
 - 3 Select the **Data Sources** tab and click **Import**.
 - 4 Select the source `server.xml` file from the file system and click **OK**.

Specify the location of the `server.xml` that you copied during data replication.

After you click **OK**, the new data sources are displayed.

- 5 **Optional: Add new data sources, or modify or remove existing data sources.**
- 6 Click **OK** to exit from the **Data Sources** tab.

Updating EPM Workspace Custom Login Information

In Release 9.x, you set up single sign-on information such as custom login using the Servlet Configurator for the Reporting and Analysis Web application. In Release 11.x, you set up single sign-on options using the Configuration and Management Console (CMC). After you upgrade, if you had any custom login information in the earlier release, you must use Shared Services to implement the custom login information in the current release. See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

Assigning New Interactive Reporting Roles

Two roles have been added to restrict users' access to information based on roles:

- IR HTML Viewer role - required to open a BQY document or Job Output in the HTML viewer.
- IR WebClient Viewer role - required to open a BQY document or Job Output in the Interactive Reporting plugin.

After you upgrade, assign users these two roles as needed; the new roles are not assigned by default. You can assign roles in one of two ways:

- Use Shared Services to provision roles. For more information, see the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.
- Use a Java SDK program to perform a bulk assignment of the new roles to users and groups. See `EPM_ORACLE_HOME/products/biplus/SDK/samples/java/AddNewRole.java` for more details on this program and the *Hyperion Reporting and Analysis Framework Developer's Guide* for details on how to run SDK programs.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Production Reporting Upgrade Tasks

After you upgrade, you must update Production Reporting engines to specify the new location of the Production Reporting executable.

➤ To update Production Reporting engines:

- 1 In EPM Workspace, select **Navigate**, then **Administer**, then **Reporting and Analysis**, and then **Production Reporting Engines**.
- 2 Right-click the engine to update and then select **Update Production Reporting Engine**.

3 Specify the new location for the Production Reporting executable.

Financial Management Upgrade Tasks

Perform the following upgrade tasks for Financial Management.

Table 44 Upgrade Tasks for Financial Management

Upgrade Task	Reference
If server names change in a cluster, run EPM System Configurator for all Financial Management clients and perform the cluster registration task to update this information locally.	“Financial Management – Register Servers and Clusters” on page 163
If cluster names are changed or deleted (which can happen during an upgrade or any time), or if server names change within a cluster, the upgrade might not be able to determine the cluster for the application. There are two possible symptoms for this issue: ● The Upgrade applications from earlier release task fails, and details are logged in <code>EPM_ORACLE_INSTANCE/diagnostics/logs/upgrades/HFMAApplicationUpgrade.log</code>. The log contains a message such as the following: “Failed to find default Cluster name for the application <i>applicationName</i>. Will register application with HSS using server <i>localServerName</i>.” ● The Upgrade applications from earlier release task succeeds, but the application fails to open in EPM Workspace, and the following error is in the Financial Management event log: “Server/Cluster is incorrectly configured. Please reconfigure your Cluster or Server connection.” If either of these symptoms occur, you must reregister applications manually using EPM Workspace to assign the correct cluster or server.	“Financial Management Upgrade Tasks” on page 228
Define a new cluster if required in the new environment.	“Clustering Financial Management Servers” on page 126

Reregistering Applications in EPM Workspace

► To register applications in EPM Workspace:

- 1 From the **Navigate** menu, select **Administer**, then **Classic Application Administration**, then **Consolidation Administration**, then **Register Application**.
- 2 Select a cluster, select an application, and then review and update as needed the values for cluster/server, User Management Project, and security URL.
- 3 Click **Register**.
- 4 Repeat for each application.
- 5 After all applications are registered, restart Foundation Services and the Web server.

When you are done with this step, return to the [“Upgrading Checklist” on page 177](#).

Strategic Finance Upgrade Tasks

Note: If you are using the Strategic Finance client as a standalone program, Strategic Finance converts the data to the upgraded format when you open the existing .alc files in the new release. If you are using a Client-Server implementation and point the upgraded Strategic Finance server to an existing database during configuration, it converts that database upon first startup, and as each entity is opened at user request. The administrator can also force one or more entities in the database by using the Strategic Finance Administrator Utility.

Table 45 Strategic Finance Upgrade Tasks

Task	Reference
In releases earlier than 9.3.x, Strategic Finance used port 1493. Since Release 9.3.x, the default port used for Strategic Finance is 7750. It might be necessary to select the new port number for connections configured on workstations that had clients installed previously.	
If you customized Strategic Finance files in the earlier release, copy the custom files and client-defined fields to the machine hosting the new installation. Replicating these files is required only if there are customizations to these files. If no customizations have been made to these files, you do not have to replicate them in the new environment; use the base files that are installed with Release 11.1.2.1. • .coa: chart of accounts files • .drs: default report spec files • .alc: alcar file • .alt: alcar template • consdata.dat (Release 9.x) • currdata.dat (Release 9.x) • currencies_user.xml (Release 11.x) • convert.idx Copy these files to <code>EPM_ORACLE_HOME/products/hsf/bin</code>. When you are done with this step, return to the “Upgrading Checklist” on page 177.	
If you are upgrading from Release 11.1.1.3, use the Strategic Finance migration utility to move Strategic Finance provisioning from the earlier release to the current release.	“Upgrading Strategic Finance Provisioning Information” on page 229

Upgrading Strategic Finance Provisioning Information

If you are upgrading from Release 11.1.1.3, use the Strategic Finance migration utility to move Strategic Finance provisioning information from the earlier release to the current release.

Note: Shared Services Release 11.1.2.1 must be running

► To upgrade provisioning information:

1 Navigate to *EPM_ORACLE_HOME*/products/hsf/scripts and open *setenv.bat* in a text editor.

2 Specify the *EPM_ORACLE_INSTANCE* location in this portion of the file:

```
rem ***** EPM_ORACLE_INSTANCE needs to be defined, please complete the environment
variable definition below
rem * ex:
rem * set EPM_ORACLE_INSTANCE=C:\Oracle\Middleware\user_projects\epmsystem1
rem *
rem *****
set EPM_ORACLE_INSTANCE=
```

In a default installation, *EPM_ORACLE_INSTANCE* is *Oracle/Middleware/user_projects/epmsystem1*.

3 From a command prompt, navigate to the following directory:

EPM_ORACLE_HOME/products/hsf/scripts

4 Run the following command:

```
ProvisioningMigrator.cmd /S:earlierReleaseServerName /U:userName
```

where *userName* is the admin user.

ERP Integrator Upgrade Tasks

Perform the following upgrade tasks for ERP Integrator.

Table 46 ERP Integrator Upgrade Tasks

Task	Reference
Delete existing scenarios from your work repository and then import the latest scenarios from the following location: <i>EPM_ORACLE_HOME</i> /products/FinancialDataQuality/odi/scenarios.	
If you have target applications with a data load method not based on FDM, create period mappings before running any data loads. Due to a difference in structure of period mappings, period mappings are not upgraded from Release 11.1.1.3 to Release 11.1.2.0.	“Updating Period Mappings” on page 230

When you are done with these steps, return to the [“Upgrading Checklist” on page 177](#).

Updating Period Mappings

► To update period mappings:

1 In ERP Integrator, expand **Setup** and select **Period Mapping** and then **Application Mapping**.

2 Select the target application and click **Add** to add period mappings.

See the *Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications Administrator's Guide* for details.

Transferring Users and Groups

Subtopics

- [Transferring Existing Performance Scorecard Users to Shared Services](#)
- [Transferring Existing Strategic Finance Users to Shared Services](#)
- [Transferring Existing FDM Users to Shared Services](#)

If you are upgrading Strategic Finance, Performance Scorecard, or FDM and did not use Shared Services security in the earlier release, use these procedures to transfer users and groups for the first time to Shared Services.

Note: If you used Shared Services security in the earlier release, you can skip this procedure.

When you are done with the tasks in this section, return to the [“Upgrading Checklist” on page 177](#).

Transferring Existing Performance Scorecard Users to Shared Services

If this is the first time you have configured Performance Scorecard for use with Shared Services, you must transfer the users and user groups from Performance Scorecard.

Before performing a transfer, the following tasks must be performed:

- Ensure that the Performance Scorecard Administrator exists in Shared Services, and has been assigned the security role of Provisioning Manager.
- Ensure that the Performance Scorecard application has been registered and assigned to a project in Shared Services.
- Ensure that all employee e-mail addresses are in a valid and correct format, such as *user@domain.domain_suffix*. If there is a user with an incorrect e-mail address, transfer might fail.

➤ To transfer users and groups to Shared Services from Performance Scorecard:

- 1 Ensure the Shared Services server is running.
- 2 Log on to Performance Scorecard as an Administrator.
- 3 From Performance Scorecard, select **Administration** then **User Provisioning Migration**.

The Shared Services Administrator For Migration page is displayed.

- 4 Enter the **User ID** and **Password** for the Administrator.

The transfer administrator must exist in Shared Services, and assigned as Provisioning Manager.

- 5 Click **Next** to display the Pre-Migration Check page.

- 6 Click **Perform Pre-Migration Check** to verify existing data, and create database tables for the migration. As the verification progresses, appropriate status messages are displayed. A message is shown when the pre-migration progress check is complete. Click **OK** to dismiss the message and continue.
- 7 Click **Next** to display the Externalize Users page.

The page shows a list of all users in the model, their details and service provider. The Migration Action status is displayed as **Migrate**.
- 8 For each user that you **DO NOT WANT** to include in the migration, click **Edit**. The Migration dialog box is displayed.
- 9 From **Migration Action**, select **Do Not Migrate** for the selected user, then click **Save**.

This user is not included in the one-time migration. In future, if the user needs to be added to the Shared Services list, you must add the user individually.
- 10 Repeat [step 9](#) for each user that you want to exclude from the migration.
- 11 **Optional:** When the list of users is complete, select the **Externalize Groups** tab to select the groups that you want to migrate.

The page shows a list of all groups in the model, the details and service provider. The Migration Action status is displayed as Migrate.
- 12 For each group that you **DO NOT WANT** to include in the migration, click **Edit**.

The Migration dialog box is displayed.
- 13 From **Migration Action**, select **Do Not Migrate** for the selected group, then click **Save**.

This group is not included in the one time migration. In future, if the group needs to be added to the Shared Services list, you must add the group individually.
- 14 Repeat [step 13](#) for each group that you want to exclude from the migration.
- 15 When the list of groups is complete, click **Next** to display the Migration to Shared Services page.
- 16 Click **Test migration**.

A confirmation is displayed when the test migration process has been successfully completed. Click **OK** to dismiss the message. If a problem is indicated in the migration status messages, correct any errors and try again.
- 17 Click **Migrate** to begin the migration process.

The progress of the migration is indicated by the Migration status messages. A message is displayed to advise the migration has been successfully completed.

All migrated users and groups are displayed, and have the inherited Performance Scorecard attributes for their security roles.

Transferring Existing Strategic Finance Users to Shared Services

If this is the first time you have configured Strategic Finance for use with Shared Services, you must transfer the users and user groups from Strategic Finance.

Note: Before you can perform this task, you must go to Shared Services and set up the user name you are using for the installation as a Provisioning Manager and Administrator. Refer to the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

➤ To migrate existing Strategic Finance users to Shared Services:

- 1 From the Windows desktop select **Start**, then **Programs**, then **Hyperion Solutions**, then **Strategic Finance**, then **Server**, and then **Server Administrator**.
- 2 When the Administrator utility prompts to ask if you wish to start migrating Strategic Finance users and user group to the new Shared Services, click **OK**.
- 3 In the **Users** dialog box, select an option from the **Migration Action** column for each user in Strategic Finance to define how each is migrated, then click **OK**.

For each user, the table lists the following information:

- The **Name** column lists the name of the user name as it exists in Strategic Finance.
- The **User ID** column lists the name of the user name as it exists in the Standard NTLM Provider.
- The **New Shared Services ID** column lists the name of the user name as it exists in Shared Services. This column is empty if the user does not yet exist in Shared Services.
- The **Role** column lists the user group role to be assigned in Shared Services as the user group is created in Shared Services.
- The **Status** column indicates if the user name has been located or not.
- The **Migration Action** column enables you to define how each user is migrated.

If a user does not exist in an external directory (NTLM, MSAD, or LDAP), select one of the following options:

- The **Create Native User** option creates a new user name in an external directory and migrate the user name over.

If a user currently exists in Shared Services, select one of the following options:

- The **Map to Existing User** option migrates the Strategic Finance user to the corresponding user name in an external directory.
- The **Don't Migrate** option does not copy the user to Shared Services.

- 4 In the **User Groups** dialog box, select an option from the **Migration Action** column and the **Role** column for each user group in the **Name** column to define how each is migrated, then click **Finish**.

For each user group, the table lists the following information:

- The **Name** column lists the name of the user group as it exists in Strategic Finance.
- The **Shared Services Name** column lists the name of the user group as it exists in Shared Services. This column is empty if the user does not yet exist in Shared Services.
- The **Role** column enables you to define how each user is migrated.
- The **Migration Action** column enables you to define how each user is migrated.

If a user group does not exist in Shared Services, select one of the following options:

- The **Create Native Group** option creates a new user group in Shared Services and migrate the user group over.

If a user group currently exists in Shared Services, select one of the following options:

- The **Merge** option merges the Strategic Finance user group with the corresponding user group in Shared Services.
- The **Don't Migrate** option does not copy the user group to Shared Services.

Once users and user groups have been migrated from Strategic Finance to Shared Services, the **Users** tab of the Administrator utility are no longer displayed, as all related functionality has been moved over to Shared Services. To verify, you can check the log file that automatically displays when the migration is complete.

Transferring Existing FDM Users to Shared Services

Use the User Migration utility to provision users in a current FDM application to Shared Services.

Note: You must log in as a Shared Services administrator to use this utility.

➤ To provision current users in an FDM application to Shared Services:

- 1 From the Windows Start menu, select **Programs, Oracle EPM System, Financial Data Quality Management, Workbench**, and then **User Migration**.

The FDM logon screen is displayed.

- 2 Log on to the FDM application in which to migrate users. This user should be an administrative user in FDM.

The FDM-User Migration window is displayed and lists all of the users associated with the FDM application.

The e-mail addresses for users shown in this window are for display purposes only. E-mail addresses are not migrated, synchronized, or provisioned in Shared Services for the selected users.

- 3 Select the appropriate application group.
- 4 Select the users to provision in Shared Services by checking the box to the left of the user name, or select **All Users**.
- 5 Click **Provision User(s)**.

When the migration is complete, the status for each user selected changes to Provisioned.

- 6 Exit the User Migration utility.
- 7 Repeat steps [step 1](#) - [step 6](#) for each FDM application for which you want to perform user migration.

Note: In order for the users to be provisioned using User Migration Utility, the users that exist in the FDM application must exist in Shared Services as part of a provider or as a native user.

Note: When using Shared Services, the Security Level option on the User Maintenance screen in FDM is not selectable. Security levels must be set in Shared Services. After changing the security level for a user, changes take effect next time the user logs on to FDM.

Upgrading Smart View

You can upgrade Smart View in one of several ways:

- Have users install Smart View from EPM Workspace: from the Tools menu, select **Install** and then **Smart View**.
- Install Smart View on client machines using the Smart View installer. See [“Installing Smart View” on page 109](#). You can also launch this installer to install Smart View silently.
- If you want to use Smart View Release 11.1.2.1 with an earlier release of EPM System products, review the *Oracle Hyperion Enterprise Performance Management System Certification Matrix* for supported versions.

Upgrading from an Environment with Multiple Releases

Subtopics

- [Upgrading From an Environment with a Single Instance of Shared Services](#)
- [Upgrading From an Environment with Two Instances of Shared Services](#)

If you are upgrading from an environment with multiple releases, use the following information to plan your upgrade. There are several scenarios; use the procedure appropriate for your deployment. Note that in these scenarios, you must upgrade all EPM System products to the current release.

Upgrading From an Environment with a Single Instance of Shared Services

If you are upgrading from an environment with a single instance of Shared Services (Release 11.1.1.3), perform the upgrade as documented in [“Upgrading Checklist” on page 177](#).

Perform the upgrade for Release 11.1.1.3 products first. Note that you must configure Foundation Services first. Next, perform the upgrade tasks for all Release 9.3.3 products.

Note: If you are upgrading multiple instances of Essbase, for each instance that you are upgrading from, you must create a new instance in Release 11.1.2.1.

Upgrading From an Environment with Two Instances of Shared Services

If you are upgrading from an environment with two instances of Shared Services (Release 11.1.1.3 or 9.3.3 and Release 11.1.2), upgrade using the following procedure.

► To upgrade an environment that has two instances of Shared Services:

- 1 Using EPM System Installer, use the **Apply maintenance release** option to move Foundation Services, Financial Close Management, and Disclosure Management from Release 11.1.2.0 to Release 11.1.2.1.

If you are applying the maintenance release to Financial Close Management, see [“Financial Close Management Maintenance Release Installation Prerequisites” on page 91](#).

- 2 Use EPM System Configurator to configure Foundation Services, Financial Close Management, and Disclosure Management.

During database configuration for Foundation Services, select **Upgrade existing database to the current release from..** and select a release number, and then select **Import Data From Earlier Release**.

- 3 Perform any required post-configuration tasks for these products. See [Chapter 7, “Performing Postconfiguration Tasks.”](#)
- 4 Using the Upgrading Checklist, upgrade all Release 11.1.1.3 or Release 9.3.3 products except Shared Services to Release 11.1.2.1. Note that you do not need to install Shared Services again. However, you do have to export Shared Services data and perform a configuration task. Perform the upgrade tasks product by product in the following order:
 - Foundation Services. Perform the tasks to export Shared Services data. See [“Exporting Shared Services Data from the Earlier Release” on page 183](#). During configuration with EPM System Configurator, when you configure Shared Services, select only **Import Data From Earlier Release**.
 - Essbase
 - All other products

Note: If you are upgrading multiple instances of Essbase, for each instance that you are upgrading from, you must create a new instance in Release 11.1.2.1.

For information about the upgrade process, see the [“Upgrading Checklist” on page 177](#).

- 5 Note that Disclosure Management mappings from Release 11.1.2.0 are not moved to Release 11.1.2.1. You must manually recreate the Disclosure Management mappings in release 11.1.2.1.

Repeating the Upgrade Process for Applications

The upgrade logic in this release is based on deploying a new software release and moving applications, data, and provisioning information from the earlier deployment to the new

deployment. This approach allows the upgrade process to be repeatable. You start with a new database, delete existing configurations, and repeat the upgrade process as documented.

➤ To repeat the upgrade process for applications:

- 1 Back up the existing 11.1.2.1 deployment.
- 2 For every machine in the deployment:
 - a. Rename the `.oracle.instances` file in the user home (`$HOME` for UNIX, `Documents and Settings/<userid>` for Windows), removing it from use.
 - b. Rename the existing `user_projects` folder to another name, removing it from use.
- 3 Reconfigure the deployment by following the regular 11.1.2.1 upgrade procedure as documented in the [“Upgrading Checklist” on page 177](#).
 - Use a new database for the Shared Services Registry
 - Reuse the replicated product databases (from the previous release)

Note: You can repeat this step as needed to get the latest data from the previous release.

6

Manually Deploying EPM System Web Applications

In This Chapter

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This chapter assumes that you are an experienced Web application server administrator. If you are not an experienced Web application server administrator, you should automatically configure and deploy EPM System Web applications using EPM System Configurator.

For detailed information about managing Web applications with WebLogic Server, see http://download.oracle.com/docs/cd/E15523_01/wls.htm.

Manually Deploying Web Applications

➤ To manually deploy EPM System Web applications:

1 Install EPM System products using EPM System Installer.

Typically, EPM System Installer installs WebLogic Server for you. If you have an existing WebLogic Server installation and want to use it instead of the WebLogic Server installed by EPM System Installer, during installation, you must install EPM System products to the same Middleware home. If EPM System Installer detects an existing WebLogic Server installation in the installation location, it does not install WebLogic Server.

Note the requirements for installing Web applications in a distributed environment. See “Installing EPM System Products in a Distributed Environment” on page 94.

2 Launch EPM System Configurator using the following command and perform all required configuration tasks except for the “Configure Web Server” task. Note that the “Deploy to Application Server” task is not available.

Windows:

```
EPM_ORACLE_HOME/common/config/  
version_number/configtool-manual.bat
```

UNIX:

```
EPM_ORACLE_HOME/common/config/  
version_number/configtool-manual.sh
```

Launching EPM System Configurator with this command hides the Web application deployment tasks and skips the product registration with Shared Services task.

See [Chapter 4, “Configuring EPM System Products.”](#)

- 3 **Launch the Fusion Middleware Configuration Wizard: From the command line, change the directory to `MIDDLEWARE_HOME/oracle_common/common/bin` and launch `config.cmd` (Windows) or `config.sh` (UNIX).**
- 4 **Select **Create a New WebLogic Domain** and then click **Next**.**

Note: All EPM System products must be deployed to the same domain. If you have already deployed EPM System products, select “Extend an Existing WebLogic Domain.” Additionally, if you are using Financial Close Management, EPM System and Oracle SOA Suite must be deployed to the same domain. If you have already configured Oracle SOA Suite, deploy EPM System products to the same domain by selecting “Extend an Existing WebLogic Domain.”

A list displays all the Web applications installed in the Middleware home. For EPM System products, the list is generated from the configuration templates that were installed during installation with EPM System Installer.

- 5 **Select **Generate a domain configured automatically to support the following products**, then select the EPM System Web applications you want to deploy, and then click **Next**.**

Oracle recommends that you simultaneously configure all Web applications.

- 6 **Enter the domain name and location and then click **Next**.**

By default, the domain location is `MIDDLEWARE_HOME/user_projects/domains`.

- 7 **Enter a user name and password for the domain administrator, and a domain description, and then click **Next**.**

- 8 **Select a WebLogic domain startup mode (Development or Production), specify which JDK to use, and then click **Next**.**

You must select Production mode. Oracle recommends that you select the default JDK.

- 9 **Configure the JDBC data sources, and then click **Next**.**

For each Web application, specify the database connection information that you entered during database configuration with EPM System Configurator.

If you configured different databases for different products, enter database connection information separately for each Web application. Select the Web application, and then enter the connection information.

Tip: EPMSysRegistry is the Shared Services and Registry database.

The Configuration Wizard tests the database connection.

- 10 **Review the Connection Result log, and then click **Next**.**

- 11 For **Managed Servers, Clusters and Machines**, on the **Configure Managed Servers** panel, enter the listen ports and change them from the default value of 7001. See the *Oracle Hyperion Enterprise Performance Management System Installation Start Here* for a list of default ports.

Note: If you change the ports from the defaults, you must also change them in the stop scripts located in `MIDDLEWARE_HOME/user_projects/domains/EPMSysSystem/bin`.

- 12 For a distributed deployment, for **Managed Servers, Clusters and Machines**, on the **Configure Machines** panel, create a machine for each machine in the deployment.
- 13 For each managed server, assign the managed server to a machine.
- 14 (Optional) For **Managed Servers, Clusters and Machines**, on the **Configure Clusters** panel, you can set up a cluster. You can also set up a cluster after you've completed the deployment. For details on Web application server clustering, see [“\(Optional\) Clustering Web Applications in a Manual Deployment” on page 244](#).
- 15 Review the Configuration Summary, and then click Create to create the domain and deploy the Web applications.

Web applications are deployed in offline mode.

- 16 For a distributed deployment:
 - a. Start the Node Manager on each machine in the deployment.
 - b. On the WebLogic Administration Server machine, pack the domain that you created.
 - c. Copy the pack to each machine in the deployment.
 - d. Unpack on each machine in the deployment.

WebLogic Server unpacks all Web applications on each machine in the deployment. On each machine, it runs the managed servers that you associated with the machine.

- 17 If you deployed Financial Close Management, perform additional manual steps. See [“Additional Postdeployment Steps for Financial Close Management” on page 244](#).

- 18 Open `MIDDLEWARE_HOME/user_projects/domains/domainName/config/fmwconfig/system-jazn-data.xml` in a text editor, and after the last `</grant>` line in the file, add the following: (Note that these changes are also required if you deployed EPM System products to a domain hosted on another machine and the domain was not created with EPM System Configurator.)

```
<grant>
<grantee>
<codesource>
<url>file:${EPM_ORACLE_HOME}/products/Essbase/eas/server/lib/eascsf.jar</url>
</codesource>
</grantee>
<permissions>
<permission>
<class>oracle.security.jps.service.credstore.CredentialAccessPermission</class>
<name>context=SYSTEM,mapName=CSF_EAS_MAP,keyName=*</name>
<actions>read,write,update,delete</actions>
</permission>
</permissions>
</grant>
```

```

<grant>
<grantee>
<codesource>
<url>file:${EPM_ORACLE_HOME}/common/CSS/11.1.2.0/lib/css.jar</url>
</codesource>
</grantee>
<permissions>
<permission>
<class>oracle.security.jps.service.policystore.PolicyStoreAccessPermission</class>

<name>context=APPLICATION,name=*</name>
<actions>getApplicationPolicy</actions>
</permission>
</permissions>
</grant>
<grant>
<grantee>
<codesource>
<url>file:${EPM_ORACLE_HOME}/common/jlib/11.1.2.0/lib/registry-api.jar</url>

</codesource>
</grantee>
<permissions>
<permission>
<class>oracle.security.jps.service.credstore.CredentialAccessPermission</class>

<name>context=SYSTEM,mapName=epm_sys_reg_cred_map,keyName=*</name>
<actions>read,write,update,delete</actions>
</permission>
</permissions>
</grant>

```

- 19** Open `MIDDLEWARE_HOME/user_projects/domains/domainName/config/fmwconfig/jps-config.xml` in a text editor and make the following changes. (Note that these changes are also required if you deployed EPM System products to a domain hosted on another machine and the domain was not created with EPM System Configurator.)

- To the `<serviceInstances>` set in the document, add the following:

```

<serviceInstances>
<serviceInstance provider="jaas.login.provider" name="idstore.loginmodule">
  <description>Identity Store Login Module</description>
  <property
value="oracle.security.jps.internal.jaas.module.idstore.IdStoreLoginModule"
name="loginModuleClassName" />
  <property value="REQUIRED" name="jaas.login.controlFlag" />
  <property value="true" name="debug" />
  <property value="true" name="addAllRoles" />
</serviceInstance>
<serviceInstance provider="idstore.ldap.provider" name="idstore.ldap">
...
  <property name="virtualize" value="true"/>
</serviceInstance>
</serviceInstances>

```

- To the `jpsContexts/jpsContext` section, add the following:

```

<serviceInstanceRef ref="idstore.loginmodule" />

```

- 20 (Optional)** To simplify the startup of WebLogic servers, edit the `boot.properties` file on every server in the domain to provide the domain user and password. This file is located in `MIDDLEWARE_HOME/user_projects/domains/domainName/servers/product/security`.

Note: Note that these inputs are stored in clear text until the servers are started, after which this data is encrypted by WebLogic.

- 21** To synchronize the password keys between the WebLogic Admin server machine and the managed server machine, copy `SerializedSystemIni.dat` from the WebLogic Admin server machine to the managed server machine; for example, `WEBLOGIC_SERVER/user_projects/domains/EPMSysstem/security` to `DOMAIN_HOME/security` where `DOMAIN_HOME` is the domain defined for the deployment in the `MIDDLEWARE_HOME/user_projects/domains` managed server home.

- 22** Start the WebLogic Administration Console and start the EPM System Web applications.

Note that when you manually deploy Web applications, use the start scripts in `DOMAIN_HOME/bin`.

Note: If you didn't perform step [step 20](#), you will be prompted to provide the domain user and password when you start the Web applications.

Tip: You can also start Web applications on all machines using the Weblogic Administration Console. To do so, you must first run `MIDDLEWARE_HOME/oracle_common/common/bin/setNMProps.sh(cmd)` to modify `nodemanager.properties`.

During the managed server startup, the Shared Services Registry is updated with values for the EPM System Web applications you deployed.

- 23** Stop all EPM System Web applications.
- 24** Launch EPM System Configurator using the following command and select the “Configure Web Server” task.

Windows:

```
EPM_ORACLE_HOME/common/config/  
version_number/configtool-manual.bat
```

UNIX:

```
EPM_ORACLE_HOME/common/config/  
version_number/configtool-manual.sh
```

EPM System Configurator performs the registration with Shared Services and Configure Web Server tasks.

If you are also want to configure Essbase while you are manually deploying Web applications, when you first ran `configtool-manual.sh`, the **Configure Essbase Server** task was not available. It is available in this second pass of configuration, so if needed, select it now.

- 25** Start all EPM System services and Web applications according to the order described in [Chapter 8, “Starting and Stopping EPM System Products.”](#) Note that when you manually deploy Web applications, use the start scripts in `DOMAIN_HOME/bin`.

Tip: You can also start Web applications on all machines using the Weblogic Administration Console. To do so, you must first run `MIDDLEWARE_HOME/oracle_common/common/bin/setNMPProps.sh(cmd)` to modify `nodemanager.properties`.

To validate the installation and verify deployment, see [Chapter 9, “Validating the Installation and Verifying Deployment.”](#)

Tip: If you need to redeploy a Web application after you have successfully deployed, replace the EAR file, delete the `tmp` folder for the managed server, and then start the application.

Additional Postdeployment Steps for Financial Close Management

If you are manually deploying Financial Close Management, perform the following procedures after you deploy.

► To complete the Financial Close Management deployment:

- 1** Go to `EPM_ORACLE_INSTANCE/bin` and run the following commands:

```
epmsys_registry.bat addproperty #APP_SERVER_ID/@adminUser ADMIN_USER
epmsys_registry.bat addproperty #APP_SERVER_ID/@adminPort ADMIN_PORT
epmsys_registry.bat addencryptedproperty #APP_SERVER_ID/@adminPassword
ADMIN_PASSWORD
epmsys_registry.bat addproperty #APP_SERVER_ID/@adminHost ADMIN_HOST
```

Where `APP_SERVER_ID` is the ID of the WebLogic AppServer component in the Shared Services Registry.

For more information about editing the Shared Services Registry, see [Appendix G, “Updating the Shared Services Registry.”](#)

- 2** Start EPM System Configurator and select the **Deploy to SOA** task.
- 3** Start the Financial Close Management Web application.

(Optional) Clustering Web Applications in a Manual Deployment

You can cluster a manually deployed Web application using WebLogic. This section provides a general overview of clustering Web applications. See the WebLogic documentation for more details on this procedure.

Note: If you deployed Web applications using EPM System Configurator, EPM System Configurator creates the cluster and adds servers to the cluster. You need not perform additional tasks in WebLogic. See [“Clustering Web Applications” on page 125](#).

➤ To cluster Web applications:

- 1 Start the WebLogic Administration Console.
- 2 If you manually deployed the Web applications, in the Domain Structures pane, click **Clusters** and create a cluster.

If you deployed the Web applications with EPM System Configurator and clicked Setup to specify the logical address for the Web application, this step is not necessary, because EPM System Configurator created the cluster for you.

- 3 If you manually deployed the Web applications, select the cluster, click the **HTTP** tab, and for **Frontend Host**, enter the host name and port of the load balancer.

If you deployed the Web applications with EPM System Configurator and clicked Setup to specify the logical address for the Web application, this step is not necessary, because EPM System Configurator entered this information during configuration.

- 4 Click the **Servers** tab, click **Add**, and on the **Add a Server to Cluster** page, select a server from the list, and then click **Finish**.
- 5 Click the **Deployments** tab, select an EPM System Web application, click the **Targets** tab, and for the cluster this Web application is deployed to, select **All Servers in the Cluster**.

Repeat this step for all EPM System Web applications.

In a distributed environment, the Node Manager propagates changes to all the machines in the cluster.

- 6 To add another server to the cluster to scale out the deployment:
 - a. Select the server and select **Clone**.
 - b. Select the server that you just cloned, and change the machine on which the server is running.
- 7 Repeat [step 2](#) - [step 6](#) as needed.
- 8 Start the servers from WebLogic Administration Console.
- 9 Launch EPM System Configurator and perform the “Configure Web Server” task.

Extending a Deployment

If you have deployed only some EPM System Web applications, you can extend the deployment by deploying additional Web applications. For example, if you previously deployed Planning, you can extend the deployment to deploy Profitability and Cost Management. Use the manual deployment steps in this chapter, however, instead of selecting “Create a New WebLogic Domain,” select “Extend an Existing WebLogic Domain.”

Deploying Financial Reporting and Web Analysis on Windows for use with Financial Management

Typically, EPM System Web applications must be deployed to either all Windows or all UNIX machines, because EPM System Configurator deploys all products to one domain. However, in a UNIX environment, if you want to use Financial Management as a data source for Financial Reporting and Web Analysis, you must deploy the Financial Reporting and Web Analysis Web applications on Windows. In this scenario, you must manually create a second domain for the Windows Web applications and manually deploy these two Web applications.

Deploy all other EPM System Web applications on your UNIX boxes either automatically with EPM System Configurator or manually using the instructions in this chapter.

On the Windows machine, you must deploy Financial Reporting and Web Analysis manually using the procedures in this chapter. During deployment, create a new domain for the Windows Web applications.

7

Performing Postconfiguration Tasks

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Some products require additional steps after configuration.

General Postconfiguration Tasks

The following table describes general postconfiguration tasks for EPM System products.

Table 47 General Postconfiguration Tasks

Task	Reference
Optional: Increase the JVM memory allocation for your Web Application Server	“Increasing the JVM Memory Allocation” on page 248
If you applied the maintenance release to move from Release 11.1.2 to Release 11.1.2.1, after you configure, clear cached files from the Web browser. This ensures that the browser uses the correct Javascript files.	

Task	Reference
If you are using Lifecycle Management to import large models, the import might take longer to process than the time specified in the default timeout settings on the WebLogic Server. To work around this issue, increase the default timeout settings for WebLogic. This applies to Performance Management Architect, Planning, Performance Scorecard, and Profitability and Cost Management.	WebLogic Server documentation
On AIX systems, you might need to increase the maximum length of the command line to allow EPM System processes to start. As root user, enter the following command: <code>chdev -l sys0 -a ncargs=16</code>	
Optional: Harden security for EPM System products.	<i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i>

Increasing the JVM Memory Allocation

Depending on the size of your environment, you might need to increase the heap size for your Web application server to optimize performance. While the default can be used in a test environment (single server type configuration), the heap size must be increased for use in a production environment (multiple servers).

Choose a method:

- To increase the heap size for the Windows service, update the Windows registry for Windows services using `regedit`. For `HKEY_LOCAL_MACHINE\SOFTWARE\Hyperion Solutions\Product Component\ServiceName`, update the `JVMOptionX` (where *X* is 1, 2, ...) whose value starts with `-Xmx`.
- Edit a product's custom start script to specify the desired heap sizes. For example, for Shared Services, open `EPM_ORACLE_INSTANCE/bin/deploymentscripts/setCustomParamsFoundationServices.bat | .sh`, and modify the `-Xms128m -Xmx1024m` entry.

Restart the Windows service or rerun the script for the product after making changes.

Shared Services Postconfiguration Tasks

The following table describes Shared Services postconfiguration tasks.

Table 48 Shared Services Postconfiguration Tasks

Task	Reference
If you are not using the default port for the Web server, or if the Web server is on a different machine than Shared Services, you must edit the Start menu item for Foundation Services to reflect the correct port number.	

Task	Reference
Provision users and groups.	<i>Oracle Hyperion Enterprise Performance Management System User and Role Security Guide</i>

EPM Workspace Postconfiguration Tasks

The following table describes EPM Workspace postconfiguration tasks.

Table 49 EPM Workspace Postconfiguration Tasks

Task	Reference
If you are not using the default port for the Web server or if the Web server is on a different machine than EPM Workspace, you must edit the Start menu item for EPM Workspace to reflect the correct port number.	
If you are integrating EPM Workspace with Oracle BI EE or BI Publisher, perform an additional task to create compatible single sign-on tokens. Because Shared Services Release 11.1.1.3 uses a different encryption method than Release 11.1.2.1.0, you must generate a new single sign-on token encryption key . You can select either Reset to default or Generate a new key. If you generate a new key, you need to replace <code>css-9_5_0.jar</code> in <code>oraclebi/web/javahostt/lib/obiscustomauth</code> on the Oracle BI EE machine with the same file from the 11.1.1.3 installation, which is in <code>HYPERION_HOME/common/css/9.5.0.0/lib</code>. After performing this task, restart Oracle BI EE and BI Publisher services. If Oracle BI EE or BI Publisher Release 10.1.3.4.1 are installed on a machine other than the machine hosting Shared Services Release 11.1.1.3.00, perform the following additional steps: 1. On the machine hosting Oracle BI EE or Oracle Business Intelligence Publisher, create a folder for <code>HYPERION_HOME</code> and then create a new environment variable, <code>HYPERION_HOME</code>, pointing to this location. 2. Create the following directory structure under <code>HYPERION_HOME</code>: <code>/common/CSS</code>. 3. Copy <code>ssHandlerTK</code> key to <code>HYPERION_HOME/common/CSS</code>. See "Regenerating Encryption Keys" in the <i>Oracle Hyperion Enterprise Performance Management System User and Role Security Guide</i> for details.	"Setting Encryption Options" in the <i>Oracle Hyperion Enterprise Performance Management System User and Role Security Guide</i>.
Optional: Use the Administer section of EPM Workspace (select Navigate, then Administer, and then Workspace Server Settings) to manage EPM Workspace properties.	For EPM Workspace properties, see the <i>Oracle Enterprise Performance Management Workspace Administrator's Guide</i>.

Performance Management Architect Postconfiguration Tasks

The following table describes Performance Management Architect postconfiguration tasks.

Table 50 Performance Management Architect Postconfiguration Tasks

Task	Reference
If you are applying the maintenance release to move from Release 11.1.2.0 to Release 11.1.2.1, update references to the Essbase Server.	“Updating Deployment Information” on page 250
After you deploy Performance Management Architect, depending on your environment, you might need to increase the Max Thread execution time (defined by the <code>StuckThreadMaxTime</code> attribute value) for the application server. Increasing this value prevents long processes from terminating.	WebLogic Server application server documentation
If you are using Lifecycle Management to import large models, the import might take longer to process than the time specified in the default timeout settings on the WebLogic Server. To work around this issue, you must reset the default timeout settings in WebLogic Server.	
Optional: Perform server administration tasks.	<i>“Administering Servers” in the Hyperion Enterprise Performance Management Architect Administrator’s Guide</i>
Optional: Based on the size of applications, you might need to increase the <code>DimensionServerStartupTimeout</code> setting in <code>bpma_server_config.xml</code> .	See “Appendix C: Configuration Settings in BPMA_Server_Config.xml” in the <i>Oracle Hyperion Enterprise Performance Management Architect Administrator’s Guide</i>

Updating Deployment Information

If you are applying the maintenance release to move from Release 11.1.2.0 to Release 11.1.2.1, perform the following procedure to update references to the Essbase Server.

Tip: To simplify updating Essbase Server information for a large number of applications, you can run a script instead of using Application Diagnostics. See [“Updating Performance Management Architect References to Essbase Server” on page 216](#).

➤ To update deployment information using Application Diagnostics:

- 1 Log in as a user who has the **EPMA Administrator** role (you need to provision this role first) and then start Performance Management Architect Application Diagnostics: In the **Application Library**, right-click an application and select **Diagnostics**, and then run the test to check for **Invalid Deployment Information**.
- 2 Select **Retrieve potential deployed locations** and then click **Apply**.
- 3 Select the correct instance and cluster, click **Synchronize deployment data**, and then click **Apply**.

Essbase Postconfiguration Tasks

Subtopics

- [Importing Linked Reporting Objects](#)
- [Setting User Limits on 64-bit AIX](#)
- [Setting Up Active-Passive Essbase Clusters](#)
- [Enabling Client Lookup by Cluster Name](#)
- [Modifying OPMN for an Additional Instance of Essbase](#)
- [\(UNIX\) Configuring the Environment for Essbase and Oracle BI EE Integration](#)

The following table describes Essbase postconfiguration tasks.

Table 51 Essbase Postconfiguration Tasks

Task	Reference
If you are using SSL for Essbase, enable SSL. Oracle recommends that you enable SSL for Essbase in a production environment.	<i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i>
Maintenance Release Only If you are applying the maintenance release to move from Essbase Release 11.1.2.0 to Release 11.1.2.1, you must import linked reporting objects from the earlier release.	“Importing Linked Reporting Objects” on page 251
(UNIX) Set User Limits on 64-bit AIX.	“Setting User Limits on 64-bit AIX” on page 252
If you set up an active-passive Essbase cluster using EPM System Configurator, perform additional steps to set up Essbase failover on both cluster nodes.	“Setting Up Active-Passive Essbase Clusters” on page 252
Enable clients to look up Essbase by cluster name instead of URL.	“Enabling Client Lookup by Cluster Name” on page 254
If you configured an additional instance of Essbase, edit <code>opmn.xml</code> for each additional instance to change the ports to unique ports.	“Modifying OPMN for an Additional Instance of Essbase” on page 254
(UNIX) If you are using Oracle BI EE as the data source for Essbase, you must set additional environment variables for the Oracle BI EE driver before launching Essbase.	“(UNIX) Configuring the Environment for Essbase and Oracle BI EE Integration” on page 255
To designate a specific installation of JRE for use with Essbase, update the <code>JVMODULELOCATION</code> setting in <code>essbase.cfg</code> .	“Changing JVMModuleLocation (UNIX)” on page 335 or “Changing JVMODULELOCATION (Windows)” on page 336
(Optional) EPM System Installer installs both 32-bit and 64-bit Essbase Server on a machine with a 64-bit operating system. You can configure Essbase to use the 32-bit binaries on a 64-bit machine.	

Importing Linked Reporting Objects

If you are applying the maintenance release to move from Essbase Release 11.1.2.0 to Release 11.1.2.1, you must import linked reporting objects from the earlier release.

Before you complete this step, you must have exported the linked reporting objects from Release 11.1.2.0. See [“Essbase Maintenance Release Installation Prerequisites” on page 90](#).

► To import linked reporting objects:

- 1 **Start Essbase Server.**
- 2 **Run the following MAXL command to import the linked reporting object data from the earlier release backup directory:**

```
IMPORT database DBS-NAME LRO from server directory  
'directoryName'
```

For example:

```
MAXL> IMPORT database Sample.Basic LRO from server directory  
'Sample-Basic-V1';
```

Setting User Limits on 64-bit AIX

When running Essbase Server on a 64-bit AIX platform, you must change the user limits to increase the size of a data segment. The following table lists suggested values:

User Limit	Value
time (seconds)	unlimited
file (blocks)	unlimited
data (kbytes)	unlimited
stack (kbytes)	No higher than 128 MB for 64-bit and 64 MB for 32-bit
memory (kbytes)	unlimited
coredump (blocks)	unlimited
nofiles (descriptors)	4096, with a maximum of less than 32,000

Setting Up Active-Passive Essbase Clusters

If you set up an active-passive Essbase cluster using EPM System Configurator, you must perform additional steps to set up Essbase failover on both cluster nodes.

► To complete the setup of the Essbase active-passive cluster:

- 1 **Update `EPM_ORACLE_INSTANCE/config/OPMN/opmn/opmn.xml` to specify the OPMN service failover network topology. In the `<notification-server interface>` section, add the `<topology>` section. For example:**

```
<notification-server interface="any">  
  <ipaddr remote="hostName" />  
  <port local="portNumber" remote="portNumber" />  
  <ssl enabled="true" wallet-file="\Oracle\Middleware\user_projects
```

```

\epmsystem1\config\OPMN\opmn\wallet" />
    <topology>
        <nodes list="nodeName1:nodeRemotePort1,nodeName2:nodeRemotePort2" />
    </topology>
</notification-server>

```

- 2 In the same section of the file, update *hostName* to match the *nodeName* for this machine.

Oracle recommends using a fully qualified name.

- 3 In the same section of the file, enable or disable SSL communication as the communication mechanism between the OPMN servers in the failover nodes. By default, the `ssl enabled` parameter is `True`.

To enable SSL, you must also recreate the wallet file on both nodes of the cluster. The wallet file parameters must be the same on both machines.

To disable SSL communication, change the `ssl enabled` parameter to `False`. For example:

```

<notification-server interface="any">
    <ipaddr remote="hostName" />
    <port local="portNumber" remote="portNumber" />
    <ssl enabled="false" wallet-file="\Oracle\Middleware\user_projects
\epmsystem1\config\OPMN\opmn\wallet" />
    <topology>
        <nodes list="nodeName1:nodeRemotePort1,nodeName2:nodeRemotePort2" />
    </topology>
</notification-server>

```

where *nodePort1* and *nodePort2* are the remote ports of OPMN on each machine in the cluster.

- 4 Update `opmn.xml` to enable service failover for Essbase. In the `<ias-component id="Essbase">` section, add `service-failover="1"`. For example:

```

<ias-component id="Essbase">
    <process-type id="EssbaseAgent" module-id="ESS" service-failover="1" service-
weight="100">

```

- 5 In the `<ias-component id="Essbase">` section of `opmn.xml`, for the first node, change `service-weight="100"` to `service-weight="101"`. For the second node, keep the value at 100.

- 6 Update `opmn.xml` to reflect the name of the cluster. In the `<ias-component id="Essbase">` section, change `id="Essbase"` from "Essbase" to the name of the cluster. For example, change:

```

<ias-component id="Essbase">

```

to

```

<ias-component id="EssbaseClusterName">

```

- 7 In `opmn.xml`, remove "numprocs" from the process set definition and change the `restart-on-death` value to "true". For example edit the following section:

```

<process-set id="AGENT" numprocs="1" restart-on-death="false">

```

as follows:

```

<process-set id="AGENT" restart-on-death="true">

```

Enabling Client Lookup by Cluster Name

Essbase clients can use a URL to connect to an Essbase cluster, in the form: `http(s)://host:port/aps/Essbase?ClusterName=clusterName`. To simplify login, Essbase clients can use the cluster name directly instead of the URL. If you want to enable client login using the cluster name, you must first specify a property to configure Provider Services. The cluster name is resolved by the Provider Services servers specified in configuration files:

► To enable lookup by cluster name:

1 Modify `essbase.cfg` and `essbase.properties` as follows:

- For server-to-server communication, modify `essbase.cfg` to specify the Provider Services server to use, in the following format, separating each URL with a semicolon:

```
ApsResolver http(s)://host:port/aps
```

- For client-to-server communication, modify `essbase.properties` to specify the Provider Services server to use, in the following format:

```
ApsResolver=http(s)://apshost1:port/aps
```

2 Restart Essbase after updating these files.

Upgrade Note!

After upgrading, update the `ApsResolver` setting in all `essbase.cfg` files (those installed for the servers, and those installed for the Essbase clients).

Modifying OPMN for an Additional Instance of Essbase

If you configured more than one instance of Essbase Server on a single machine, each instance has its own OPMN, its own start scripts, and its own log files. You must update each instance's copy of `opmn.xml` so that each OPMN has unique ports for communication.

► To modify OPMN for an additional instance of Essbase:

1 Open `MIDDLEWARE_HOME/user_projects/instanceName/config/OPMN/opmn/opmn.xml` in a text editor.

2 In the `<notification-server interface="any">` section of the file, update the two port values (port local="`portNumber`" and remote="`portNumber`") for this instance of OPMN so it does not conflict with other instances, and then save the file. For example:

```
<notification-server interface="any">
  <ipaddr remote="hostName" />
  <port local="portNumber" remote="portNumber" />
  <ssl enabled="false" wallet-file="\Oracle\Middleware\user_projects
\epmsystem1\config\OPMN\opmn\wallet" />
</notification-server>
```

3 Perform this step on each instance of `opmn.xml`.

(UNIX) Configuring the Environment for Essbase and Oracle BI EE Integration

If you are using Oracle BI EE as the data source for Essbase, you must set additional environment variables for the Oracle BI EE driver before launching Essbase.

Note: Essbase Release 11.1.2 integrates with Oracle BI EE Release 10g (10.1.3.4 and later) on UNIX.

► To configure the environment for Essbase and Oracle BI EE integration:

1 Install the Oracle BI EE ODBC driver.

Oracle BI EE ODBC driver components are installed in their own Home directory. Ensure that the UNIX users who have access/execute privileges to Essbase have the same privileges to the Oracle BI EE ODBC driver components.

2 Modify `odbc.ini` (for Essbase) and `odbcinst.ini` (for Essbase Studio) to add the Oracle BI EE ODBC driver. These files are in `EPM_ORACLE_HOME/common/ODBC/Merant/6.0`. Modify the files by editing the DSN (for `odbc.ini`) or the driver descriptor (for `odbcinst.ini`) to include the absolute path for the Oracle Business Intelligence Enterprise Edition ODBC driver.

Use the following example for the DSN entry for `odbc.ini`:

```
[ODBC Data Sources]
:
OBI Paint=Oracle BI Server [DSN for OBI driver]

[ODBC]
IANAAppCodePage=4
InstallDir=/EPM_ORACLE_HOME/common/ODBC/Merant/6.0
Trace=1
TraceFile=/EPM_ORACLE_HOME/common/ODBC/Merant/6.0/odbctrace.out
TraceDll=/EPM_ORACLE_HOME/common/ODBC/Merant/6.0/lib/odbctrac.so

[OBI Paint] [DSN entry]
Driver=../../OracleBI/server/Bin/libnqsodbc.so [path to load OBI driver]
Description=Oracle BI Server
ServerMachine=qtflnx10.us.oracle.com
Repository=
Catalog=
UID=Administrator
PWD=Administrator
Port=9703
```

Use the following example for the {driver descriptor} entry for `odbcinst.ini`:

```
[ODBC Drivers]
Oracle BI Server=Installed [driver descriptor. same as the one in essbase.cfg]

[Oracle BI Server] [driver descriptor entry]
Driver=../../OracleBI/server/Bin/libnqsodbc.so [path to load OBI driver]
APILevel=3
ConnectFunctions=YYN
DriverODBCVer=3.52
```

```
FileUsage=0
SQLLevel=2
```

3 Add the following environment variables to the `opmn.xml` file:

```
<variable append="true" id="LD_LIBRARY_PATH"
  value="/vol1/prod1/OracleBI/server/Bin"/>
<variable append="true" id="LD_LIBRARY_PATH"
  value="/vol1/prod1/OracleBI/web/Bin"/>
<variable id="SATEMPDIR" value="/vol1/prod1/OracleBIData/tmp"/>
<variable id="SAROOTDIR" value="/vol1/prod1/OracleBI"/>
<variable id="SA_ROOTDIR" value="/vol1/prod1/OracleBI"/>
<variable id="SADATADIR" value="/vol1/prod1/OracleBIData"/>
```

Integration Services Postconfiguration Tasks

The following table describes Integration Services postconfiguration tasks.

Table 52 Integration Services Postconfiguration Tasks

Task	Reference
Configure data sources. To create OLAP models or build metaoutlines, you must connect Integration Services to a database that contains metadata (the OLAP Metadata Catalog database) and to a database in which needed users' data is stored (the Data Source database).	"Configuring Data Sources" in <i>Oracle Essbase Integration Services System Administrator's Guide</i>
Create an OLAP Metadata Catalog	"Creating, Upgrading, and Deleting OLAP Metadata Catalogs" in <i>Oracle Essbase Integration Services System Administrator's Guide</i>
Connect to Server Components and Data Sources	"Connecting to Server Components and Data Sources" in <i>Oracle Essbase Integration Services System Administrator's Guide</i>
If you are using the XML Import/Export feature, map JDBC Data Sources	"Mapping JDBC Data Sources (Teradata Users Only)" in <i>Oracle Essbase Integration Services System Administrator's Guide</i>
Optional: Set up sample applications.	"Setting Up the Sample Applications" in <i>Oracle Essbase Integration Services System Administrator's Guide</i>

Essbase Studio Postconfiguration Tasks

The following table describes Essbase Studio postconfiguration tasks.

Table 53 Essbase Studio Postconfiguration Tasks

Task	Reference
If you used the “Apply Maintenance Release” option to move from Essbase Studio Release 11.1.2 to this release, update the Essbase Studio catalog.	“Updating the Essbase Studio Catalog” on page 257
Optional: Customize Essbase Studio <code>server.properties</code> (in properties, located in the <code>EPM_ORACLE_INSTANCE/BPMS/bpms/bin</code>). Upgrade Note! When you upgrade, Essbase Studio properties from the earlier release are not retained. If you want to use the same settings in the upgraded release, you must re-enter them.	<i>Oracle Essbase Studio User's Guide</i>
If you want to use drivers that are not installed by EPM System Installer, download the appropriate drivers and install them to the required location.	<i>Oracle Essbase Studio User's Guide</i>

Updating the Essbase Studio Catalog

If you used the “Apply Maintenance Release” option to move from Essbase Studio Release 11.1.2 to this release, you must update the Essbase Studio catalog after installation and configuration.

You update the catalog by issuing the `reinit` command in the Essbase Studio command line client. This updates the catalog with the latest release procedures.

➤ To update the Essbase Studio catalog:

1 Ensure that Essbase Studio Server is running.

2 From the `EPM_ORACLE_INSTANCE/bin` directory, run one of the following scripts:

```
start_BPMS_bpms1_CommandLineClient.bat | sh
```

A command window called the CPL Shell is displayed.

3 At the prompt, enter a valid Essbase Studio host name, administrator user name, and password.

Note: You must have Essbase Studio administrator privileges to use the `reinit` command.

4 At the prompt, enter the following command:

```
reinit
```

5 Enter `exit` to close the CPL Shell.

The Essbase Studio catalog is now ready for use.

Reporting and Analysis Postconfiguration Tasks

Subtopics

- [Configuring the Financial Reporting Print Server](#)
- [Configuring X11 for Web Application Server Components for Financial Reporting \(UNIX\)](#)
- [Configuring SAP Data Source Access and Authentication](#)
- [Adding Drivers for Web Analysis](#)
- [Setting up the Environment Variables for Production Reporting \(UNIX\)](#)
- [Preparing Interactive Reporting for Printing \(UNIX\)](#)
- [Configuring Fonts \(UNIX\)](#)
- [Re-creating the Executables \(Production Reporting Only\) \(UNIX\)](#)

The following table describes Reporting and Analysis postconfiguration tasks.

Table 54 Reporting and Analysis Postconfiguration Tasks

Task	Reference
Optional: Customize properties for Reporting and Analysis Framework using the Administer Module in EPM Workspace. Tip: If there is a firewall between the Web and the agent, use the property "Pass data using streams instead of files."	<i>Hyperion Reporting and Analysis Framework Administrator's Guide</i>
Optional: Customize initial user preferences for Financial Reporting using JConsole. JConsole is the Java Monitoring and Management Console used to define and manage the various properties for Financial Reporting and the applications that run with it, across multiple servers. When you select Attributes on the MBeans tab, you can view and set the properties and values. Launch JConsole using <code>EPM_ORACLE_HOME/products/financialreporting/bin/FRConfig.cmd (.sh)</code>	<i>Oracle Hyperion Financial Reporting Studio User's Guide</i>
For Financial Reporting, if you are using Oracle Universal Content Management for external content, use JConsole to configure it. Launch JConsole using <code>EPM_ORACLE_HOME/products/biplus/bin/FRConfig.cmd (.sh)</code>	<i>Oracle Hyperion Financial Reporting Workspace Administrator's Guide</i>
For Reporting and Analysis Framework on IPV6 systems, update <code>default-domain.cfg</code>, in <code>EPM_ORACLE_HOME/common/raframeworkrt/11.1.2.0/lib</code>, to include the following entry at the end of the file: <pre>policies:iiop:server_address_mode_policy:publish_hostname="true"</pre>	
For Financial Reporting integration with Oracle Hyperion Public Sector Planning and Budgeting, to use the Search Facility in the HTML output, configure a search engine capable of searching HTML pages.	
Configure the Financial Reporting Print Server. The Print Server runs only on Microsoft Windows.	"Configuring the Financial Reporting Print Server" on page 259

Task	Reference
If you are unable to connect to a Network Address Translated server from a Financial Reporting Studio installation outside the firewall, add the <code>-DuseHostname=true</code> JVM parameter on the Foundation Services server, and add the following property in the <code>default-domain.cfg: policies:iiop:server_address_mode_policy:publish_hostname="true"</code> .	<i>Oracle Hyperion Financial Reporting Studio User's Guide</i>
(UNIX) Configure X11 for Web application server components for Financial Reporting. You must also set the <code>DISPLAY</code> variable for Production Reporting in order to generate charts.	“Configuring X11 for Web Application Server Components for Financial Reporting (UNIX)” on page 261
To configure Reporting and Analysis to access SAP JAVA Connector (SAP JCo) data sources and optionally to authenticate users against an SAP server, install the SAP JCo files to each Reporting and Analysis component machine. (Applies to Web Analysis, and Production Reporting.)	“Configuring SAP Data Source Access and Authentication” on page 261
For Web Analysis: If you are using an RDBMS as a data source or for relational drill-through, add the necessary drivers.	“Adding Drivers for Web Analysis” on page 262
(UNIX) Set up environment variables for Production Reporting.	“Setting up the Environment Variables for Production Reporting (UNIX)” on page 263
(UNIX) Prepare Interactive Reporting for printing.	“Preparing Interactive Reporting for Printing (UNIX)” on page 263
Optional: Configure fonts for UNIX systems.	“Configuring Fonts (UNIX)” on page 263
Optional: (UNIX) Recreate the executables for Production Reporting.	“Re-creating the Executables (Production Reporting Only) (UNIX)” on page 264

Configuring the Financial Reporting Print Server

You must install Financial Reporting Studio before you can configure the Financial Reporting Print Server. See [“Installing Financial Reporting Studio and Financial Reporting Print Server” on page 111](#). In addition, the Financial Reporting Application Server must be installed, configured, and running.

► To configure the Financial Reporting Print Server:

- 1 From a command line, navigate to *FinancialReportingStudio_Installation_Location/products/financialreporting/install/bin* and open `FRSetupPrintServer.properties` in a text editor.
- 2 Specify the Financial Reporting Server URL and administrator credentials used to register the Financial Reporting Print Server:
 - `FRWebServer=http://server:port` (specify the same Server URL used when connecting from Financial Reporting Studio)
 - `AdminUser=username`
 - `AdminPassword=password`
- 3 From a command line, navigate to *FinancialReportingStudioInstallationLocation/products/financialreporting/install/bin/* and run the following command:
`FRSetupPrintServer.cmd` to configure and register the Print Server.
- 4 Ensure that the Financial Reporting Print Server service has been created and started. You might have to start it manually the first time.

In addition, note the following requirements.

To print cell documents, the corresponding “print” applications (Microsoft Word, Excel, and PowerPoint) on the Print Server machine must have the following characteristics:

- Be properly installed
- Be properly registered for printing in the computer’s registry
- Be available to the “SYSTEM” account
- Have access to, and be able to print from, the printers installed by Financial Reporting (HRPrinter1-5). The SYSTEM account issues all print requests, so it is important that the applications can print using the Print Server’s printers.

To optimize the print server, disable the following items:

- All add-ins (including EPM System add-ins) from all Microsoft Office applications to enhance application launch time and consume system resources. If enabled, it may display UI components that require user input.
- SmartTags (Office 2002+) to enhance performance.
- “Office Assistant” which prompts the user for input, which halts printing.

Tip: Dedicate a machine as a print server, and ensure that add-ins are not used.

Configuring X11 for Web Application Server Components for Financial Reporting (UNIX)

To perform chart generation, Financial Reporting requires access to a graphics display device, either real or virtual. Oracle recommends that you use an X virtual frame buffer (Xvfb) instead of a hardware graphics display device, because Xvfb performs all operations in memory and does not require that screens or input devices be attached to the machine. For details about enabling Xvfb, see [Appendix H, “Enabling an X Virtual Frame Buffer for Financial Reporting and Production Reporting.”](#)

You must also set the `DISPLAY` variable for Production Reporting to generate charts.

Configuring SAP Data Source Access and Authentication

To configure Reporting and Analysis (Web Analysis, and Production Reporting) to access SAP JAVA Connector (SAP JCo) data sources and optionally to authenticate users against an SAP server, install the SAP JCo files to each Reporting and Analysis component machine.

- To configure Reporting and Analysis to use SAP as a data source and optionally to use SAP as an authentication provider:

1 Obtain the SAP JCo files:

- From your SAP distribution
- Download from the SAP Web site as a registered user at <https://service.sap.com/connectors>

2 (Windows) After Reporting and Analysis installation:

- a. Place the SAP JCo binaries in `EPM_ORACLE_HOME/common/SAP/bin`.
- b. Place the SAP JCo java archives (JAR files) in `EPM_ORACLE_HOME/common/SAP/lib`.
- c. Expand the JAR file, using the convenience utility, in `EPM_ORACLE_HOME/common/SAP/lib/explodejarUsingJRE.bat` | `sh`.

3 UNIX: After Reporting and Analysis installation, place the SAP JCo binaries in `EPM_ORACLE_HOME/common/SAP/bin`. Place the SAP JCo java archives (.jar files) in `EPM_ORACLE_HOME/common/SAP/lib`.

4 Optional: To configure Reporting and Analysis to use SAP as an authentication provider:

- a. Download these files from the SAP Enterprise Portal EP60 SP2 or later into `EPM_ORACLE_HOME/common/SAP/lib`.

For the 64-bit version of Financial Reporting, use `EPM_ORACLE_HOME/common/SAP-64/lib`.

- `com.sap.security.core.jar`
- `com.sap.security.api.jar`
- `sap.logging.jar`
- `iaik_jce.jar`

- `iaik_jce_export.jar` (if using the export version of the IAIK-JCE libraries)
- b. After installation, expand the JAR files, using the convenience utility, in
- ```
EPM_ORACLE_HOME/common/SAP/lib/explodejarUsingJRE.bat | sh
```

For the 64-bit version of Financial Reporting, use `EPM_ORACLE_HOME/common/SAP-64/lib/explodejarUsingJRE.bat | shs`.

## Adding Drivers for Web Analysis

If you are using an RDBMS as a data source or for relational drill-through, add the necessary drivers.

► To add drivers for Windows:

- 1 **Append** `EPM_ORACLE_INSTANCE/bin/deploymentScripts/setCustomParamsWebAnalysis.bat` **with an updated value for the** `EXT_POST_CLASSPATH` **variable. Add each RDBMS driver JAR file separately into the variable definition. For example:**

```
set EXT_POST_CLASSPATH=C:/jdbcdrivers/db2java.jar;C:/jdbcdrivers/db2jcc.jar;C:/jdbcdrivers/db2jcc_license_cisuz.jar;C:/jdbcdrivers/ojdbc14.jar;%EXT_POST_CLASSPATH%
```

Editing this file affects only the Web Analysis services that were started using `startWebAnalysis.bat` in `EPM_ORACLE_INSTANCE/bin`.

- 2 **Using Regedit, look in:** `HKEY_LOCAL_MACHINE\SOFTWARE\Hyperion Solutions\WebAnalysis\HyS9WebAnalysis\JVMOptionX` **for the** `-Djava.class.path` **value, and append the driver paths.**

For example, for SQL Server, you might append:

```
C:\jdbc\msbase.jar;C:\jdbc\mssqlserver.jar;C:\jdbc\msutil.jar;C:\jdbc\sqljdbc.jar
```

The full list of JAR files:

- Oracle - `ojdbc14.jar`
- DB2 - `db2java.jar db2jcc.jar db2jcc_license_cisuz.jar db2jcc_license_cu.jar`
- SQL Server - `msbase.jar mssqlserver.jar msutil.jar sqljdbc.jar`

- 3 **Restart Web Analysis.**

► To add drivers for UNIX:

- 1 **Append** `EPM_ORACLE_INSTANCE/bin/deploymentScripts/setCustomParamsWebAnalysis.sh` **with an updated value for** `EXT_POST_CLASSPATH` **variable. Add each RDBMS driver JAR file into the variable definition separately. For example:**

```
EXT_POST_CLASSPATH=$HOME/jdbcdrivers/db2java.jar:$HOME/jdbcdrivers/db2jcc.jar:$HOME/jdbcdrivers/db2jcc_license_cisuz.jar:$HOME/jdbcdrivers/ojdbc14.jar:${EXT_POST_CLASSPATH}
export EXT_POST_CLASSPATH
```

# Setting up the Environment Variables for Production Reporting (UNIX)

You run a script to set the environment variables. The scripts are in specified database directories.

- To configure the environment variables, locate the environment scripts in the following directories:

*EPM\_ORACLE\_HOME/products/biplus/bin/SQR/Server/db\_name/bin*

or, for the 64-bit version:

*EPM\_ORACLE\_HOME/products/biplus/bin/SQR/Server/db\_name/bin64*

where *db\_name* is the name of the database. The following databases are supported: Oracle, Sybase, Informix, DB2, ODBC, DDO, and Teradata.

- For all databases, the following script configures the basic environment variables:
  - For C Shell: `source setenv.csh`
  - For Bourne or Korn Shell: `setenv.sh`
- For the DDO database, the following script configures additional environment variables:
  - For C Shell: `source setjre.csh`
  - For Bourne or Korn Shell: `setjre.sh`

In addition, for jobs with charts, configure X11 display as described in [Appendix H, “Enabling an X Virtual Frame Buffer for Financial Reporting and Production Reporting.”](#)

## Preparing Interactive Reporting for Printing (UNIX)

- To prepare Interactive Reporting for printing:

- 1 Ensure that Acrobat Reader is installed.
- 2 If the installation location for Acrobat Reader is not in the *PATH*, set a new environment variable: *PATH\_TO\_ACROREAD*, where the path is the Acrobat Reader installation location.

## Configuring Fonts (UNIX)

Perform these procedures if you want to improve the quality of the fonts.

Interactive Reporting Service must be configured with appropriate fonts to ensure that BQY documents in EPM Workspace have a consistent look and feel with the Web Client. You must make Type1, TrueType, or OpenType fonts available to Interactive Reporting Service. The configured fonts must support characters for all intended languages.

EPM System Installer installs Andale WT font in *EPM\_ORACLE\_HOME*/products/biplus/fonts directory and configures Interactive Reporting Service to use it. This font supports most characters from Western European languages, as well as Chinese, Japanese, and Korean.

Customers must use fonts appropriate for their usage. For example, when using Western European languages, for a Windows-like look and feel, you could download Microsoft's TrueType Web fonts and configure as below:

► To make Microsoft's TrueType Web fonts available to EPM Workspace:

**1** Download the Microsoft TrueType Web fonts from:

<http://sourceforge.net/projects/corefonts/> or other source.

**2** Create a directory for the font files.

**3** If you are using downloaded Microsoft fonts, extract each file (\*.exe) into the newly created directory using the `cabextract` utility:

```
downloadLocation/cabextract -d directory CAB file
```

**Tip:** Cabextract is an open-source tool that enables you to extract font files. You can download it from the Web.

**4** Using the `ttmkfdir` utility, create a `fonts.dir` file in the directory containing the font files.

**Tip:** You can download the `ttmkfdir` utility from the following URL: <http://packages.debian.org/stable/x11/ttmkfdir>.

**5** Add the `fonts.dir` directory to environment variable `FONT_PATH`, or add it to the `BQ_FONT_PATH` environment variable inside *EPM\_ORACLE\_HOME*/common/raframeworkrt/11.1.2.0/bin/set\_common\_env.sh.

**6** Restart Interactive Reporting Service.

## Re-creating the Executables (Production Reporting Only) (UNIX)

For Production Reporting for Sybase, Oracle, Informix, DB2, and Teradata, ensure that you have the proper database client software installed on the same machine as Production Reporting. Production Reporting for ODBC and DDO does not require additional libraries.

If you have your own user-defined functions, if a new version of the database libraries becomes available, or to apply OS-level patches, then you must relink the product as described in this section. The Production Reporting script uses standard environment variables for each database to identify the location of the libraries.

You must re-create the executables if the version of the operating system or database client software is different than when the original executables were created. Find the versions by using the following command line flag:

```
-id
```



- To re-create the executables, enter the following commands from a shell:

```
cd EPM_ORACLE_HOME/products/biplus/bin/SQR/Server/db_name/lib
./sqrmake
```

where *db\_name* is the name of one of the following database names: Oracle, Informix, DB2, Sybase, ODBC, DDO, or Teradata.

*HYPERION\_HOME* and *SQRDIR* are required to re-create the executables. Set *SQRDIR* to *EPM\_ORACLE\_HOME/products/biplus/bin/SQR/Server/db\_name/bin*.

## Planning Postconfiguration Tasks

The following table describes Planning postconfiguration tasks.

**Table 55** Planning Postconfiguration Tasks

| Task                                                                                                                                                                             | Reference                                                                                                              |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| If you applied the maintenance release to move from Planning Release 11.1.2.0 to Release 11.1.2.1, you must run the Upgrade Wizard and use the <b>Upgrade Applications</b> page. | <a href="#">“Updating Planning References to a Rehosted Server Environment and Upgrading Applications” on page 216</a> |
| If you are using Offline Planning, perform the postconfiguration tasks.                                                                                                          | <a href="#">“Configuring Offline Planning” on page 265</a> and <i>Oracle Hyperion Planning Administrator's Guide</i>   |
| (UNIX) Configure the Planning locale for a non-English UNIX environment.                                                                                                         | <a href="#">“(UNIX) Configuring the Planning Locale for Use in Non-English Environments ” on page 266</a>              |

## Configuring Offline Planning

- To configure Offline Planning:

- 1 Because Offline Planning Provider terminates when a user without proper access takes a form offline, administrators must give users the following permissions:
  - Read and write permissions for the following directories and subdirectories:  
*EPM\_ORACLE\_HOME/products/Planning/Offline/myanalytics* and  
*EPM\_ORACLE\_HOME/products/Planning/offline/offlinedata*.
  - Read and execute permissions for *c:/windows/system32/msvcr71.dll*.
- 2 Install Smart View.
- 3 Enable the form for offline use and assign appropriate roles. See the *Oracle Hyperion Planning Administrator's Guide* and the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*.

## (UNIX) Configuring the Planning Locale for Use in Non-English Environments

► To configure the Planning locale for use in a non-English UNIX environment:

1 In `EPM_ORACLE_INSTANCE/bin/deploymentScripts`, edit `setCustomParamsHyperionPlanning.sh` to include these items:

- An *ESSLANG* value
- A *LANG* value
- An *LC\_CTYPE*

*ESSLANG*, *LANG* and *LC\_CTYPE* should be assigned the same locale.

For example, for simplified Chinese:

```
ESSLANG=SimplifiedChinese_China.MS936@Binary; export ESSLANG
```

```
LANG=zh_CN.gb18030; export LANG
```

```
LC_CTYPE=zh_CN.gb18030; export LC_CTYPE
```

See the table at the end of this section for more languages.

2 Ensure that the *ESSLANG* value that you set in `setCustomParamsHyperionPlanning.sh` matches the *ESSLANG* value set for Essbase Server (set with EPM System Configurator).

**Table 56** *ESSLANG*, *LANG* and *LC\_CTYPE* Values

| Language            | ESSLANG                                 | LANG   LC_ALL   LC_CTYPE |
|---------------------|-----------------------------------------|--------------------------|
| Brazil-Portuguese   | Portuguese_Portugal.ISO-8859-15@Default | pt_BR.ISO8859-1          |
| Dutch               | Dutch_Netherlands.ISO-8859-15@Default   | nl_NL.iso88591           |
| Swedish             | Swedish_Sweden.ISO-8859-15@Swedish      | sv_SE.iso885915          |
| Korean              | Korean_Korea.MS949@Binary               | ko_KR.euckr              |
| Finnish             | Finnish_Finland.ISO-8859-15@Finnish     | fi_FI.iso885915@euro     |
| Simplified Chinese  | SimplifiedChinese_China.MS936@Binary    | zh_CN.gb18030            |
| Japanese            | Japanese_Japan.JapanEUC@Binary          | ja_JP.eucJP              |
| Danish              | Danish_Denmark.ISO-8859-15@Danish       | da_DK.ISO8859-15         |
| Traditional Chinese | TraditionalChinese_Taiwan.EUC-TW@Binary | Zh_TW.big5               |
| German              | German_Germany.Latin1@Default           | de_DE.iso885915@euro     |
| French              | French_France.ISO-8859-15@Default       | fr_FR.ISO8859-15         |
| Arabic              | Arabic_SaudiArabia.ISO-8859-6@Default   | ar                       |

# Financial Management Postconfiguration Tasks

The following table describes Financial Management postconfiguration tasks.

**Table 57** Financial Management Postconfiguration Tasks

| Task                                                                                                                                                                                                                                             | Reference                                                                                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| If you applied the maintenance release to move from Release 11.1.2.0 to Release 11.1.2.1, you must update the schema. In EPM System Configurator, from the Financial Management tasks, select <b>Upgrade applications from earlier release</b> . |                                                                                                                                            |
| To use Extended Analytics, create a UDL file and optionally, encrypt it.                                                                                                                                                                         | <i>Oracle Hyperion Financial Management Administrator's Guide</i>                                                                          |
| Use the HFM Configuration Utility (HFMConfigure.exe) in <code>EPM_ORACLE_HOME/products/FinancialManagement/client</code> to perform DSN configuration for Extended Analytics and to register clusters and servers.                               | <i>Oracle Hyperion Financial Management Administrator's Guide</i> or the online Help for the HFM Configuration Utility (HFMConfigure.exe). |
| <b>Optional:</b> Configure Settings for IIS 5.0 Isolation Mode.                                                                                                                                                                                  | <a href="#">"Configuring Settings for IIS 5.0 Isolation Mode (Optional)" on page 267</a>                                                   |

## Configuring Settings for IIS 5.0 Isolation Mode (Optional)

Before you install Financial Management, you install and configure IIS. However, if you run IIS 5.0 Isolation mode in IIS 6.0 on Windows 2003, after you run EPM System Configurator and create Web directories, you must set two additional IIS properties for the Application Protection and Authentication Level.

► To set the properties for IIS 5.0 Isolation mode:

- 1 Select **Start**, then **Programs**, then **Administrative Tools**, and then **Internet Services Manager**.
- 2 Expand **Internet Information Services** and its subdirectories, and right-click the virtual directory for Financial Management; for example, HFM, and select **Properties**.
- 3 On the **Virtual Directory** tab, from the list for Application Protection, change the setting to **High (Isolated)**.
- 4 Close Internet Services Manager.
- 5 Select **Start**, then **Programs**, then **Administrative Tools**, and then **Component Services**.
- 6 Expand the directories, and then select **COM+ Applications**.
- 7 Select the Financial Management Web site; for example, IIS (Default Web Site//Root/HFM).
- 8 Right-click the Web site and select **Properties**.
- 9 On the **Security** tab, from the list in the **Authentication Level for Calls**, change the setting to **None**.

## Strategic Finance Postconfiguration Tasks

The following table describes Strategic Finance postconfiguration tasks.

**Table 58 Strategic Finance Postconfiguration Tasks**

| Task                                                | Reference                                                                                                                                           |
|-----------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| Set up servers and databases.                       | Chapter 2, “Performing Server-Related Tasks” and Chapter 3, “Working With Databases” in the <i>Hyperion Strategic Finance Administrator's Guide</i> |
| Connect the Strategic Finance client to the server. | “Managing Entities on Strategic Finance Servers” in the <i>Hyperion Strategic Finance User's Guide</i> .                                            |

## Performance Scorecard Postconfiguration Tasks

The following table describes Performance Scorecard postconfiguration tasks.

**Table 59 Performance Scorecard Postconfiguration Tasks**

| Task                                                                                                                                                                                                                                                                 | Reference |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|
| If you use Lifecycle Management to import large models, the import might take longer to process than the time specified in the default timeout settings on the WebLogic Server. To work around this issue, increase the default timeout settings in WebLogic Server. |           |

## Profitability and Cost Management Postconfiguration Tasks

### Subtopics

- [Installing and Configuring the Repository Creation Utility](#)
- [Configuring Oracle Web Services Manager](#)
- [Configuring the Keystore and Modifying the Credential Store](#)
- [Starting Web Services Policy Manager](#)
- [Starting Managed Servers](#)

After configuring EPM Workspace, there are several postconfiguration tasks that must be completed before you can use Profitability and Cost Management.

**Table 60 Profitability and Cost Management Postconfiguration Tasks**

| Task                                                                                                                                                                                                                                                              | Reference                                                                      |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| If you are applying the maintenance release to move from Profitability and Cost Management Release 11.1.2.0 to Release 11.1.2.1, reregister applications in Performance Management Architect.                                                                     |                                                                                |
| Increase the heap size for your Web application server.                                                                                                                                                                                                           | <a href="#">“Increasing the JVM Memory Allocation” on page 248</a>             |
| If you use Lifecycle Management to import large models, the import might take longer to process than the time specified in the default timeout settings on the WebLogic Server. To work around this issue, reset the default timeout settings in WebLogic Server. | <i>Oracle Hyperion Profitability and Cost Management Administrator's Guide</i> |

| Task                                                                                                                                    | Reference                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|
| If you are using Oracle Web Services Manager to automate Profitability and Cost Management tasks, perform the following tasks in order: |                                                                                           |
| 1. Install and run Repository Creation Utility (RCU) to set up the required schemas to work with Oracle Web Services Manager (OWSM).    | <a href="#">“Installing and Configuring the Repository Creation Utility” on page 269</a>  |
| 2. Configure Oracle Web Services Manager (OWSM).                                                                                        | <a href="#">“Configuring Oracle Web Services Manager” on page 270</a>                     |
| 3. Configure the keystore and modify the credential store for Oracle Web Services Manager.                                              | <a href="#">“Configuring the Keystore and Modifying the Credential Store” on page 271</a> |
| 4. Start <code>wsm-pm</code> .                                                                                                          | <a href="#">“Starting Web Services Policy Manager” on page 271</a>                        |
| 5. Restart managed servers.                                                                                                             | <a href="#">“Starting Managed Servers” on page 272</a>                                    |

## Installing and Configuring the Repository Creation Utility

If you will be using Oracle Web Services Manager to automate Profitability and Cost Management tasks, you must install the Repository Creation Utility (RCU) before configuring the EPM System products. The RCU creates the required schemas to work with Oracle Web Services Manager (OWSM). Oracle Web Services Manager is automatically installed, but not configured, with EPM Workspace.

➤ To install and configure the Repository Creation Utility:

- 1 **Download the Repository Creation Utility from the “Oracle Enterprise Performance Management System” Media Pack on Oracle EDelivery.**
- 2 **Navigate to the `Installer-RCU` folder.**
- 3 **Copy `rcuHome.zip` to the location in which you want to install the Repository Creation Utility, and extract the contents.**
- 4 **From `rcuHome/bin`, run the Repository Creation Utility to create the database schema to manage the automated processing, using the appropriate file for your operating system:**
  - For Windows, run `rcu.bat`
  - For UNIX, run `./rcu`

**Note:** Ignore any messages about using a non-AL32UTF8 database.

The new database schema is required for “Metadata Services” and does not reflect the Profitability and Cost Management model database. For detailed information, see the *Oracle Fusion Middleware Repository Creation Utility User's Guide 11g*.

- 5 **On the **Database Connection Details** page, specify a user with DBA or SYSDBA privileges, such as `sys`.**

- 6 On the **Select Components** page, perform these tasks:
  - Expand **AS Common Schemas** and select **Metadata Services**, if it is not already selected.
  - Make a note of the **Schema Owner** names for all the components because you need them to configure Oracle Web Services Manager.
- 7 On the **Schema Passwords** page, Oracle recommends that you select **Use same passwords for all schemas**. Make a note of this password.
- 8 On the **Summary** page, review the selections, and then click **Create**.
- 9 On the **Completion Summary** page, click **Close**.

For additional information on the Repository Creation Utility, see the *Oracle® Fusion Middleware Repository Creation Utility User's Guide 11g Release 1 (11.1.1)*.

## Configuring Oracle Web Services Manager

When you install EPM Workspace, Release 11.1.2.1, Oracle Web Services Manager (OWSM) is automatically installed, but not configured.

You must configure OWSM before you can use Web Services.

► To configure OWSM:

- 1 Select **All Programs**, then **Oracle WebLogic**, then **WebLogic Server 11g**, then **Tools**, and then **Configuration Wizard**.
- 2 On the **Welcome** screen, select **Extend an Existing WebLogic domain** to add new components to the existing EPM domain, and modify configuration settings.
- 3 Click **Next**.
- 4 Under **Select a WebLogic Domain Directory**, select `user_projects`, then `domains`, and then `EPMSys`, and then click **Next**.

If you specified a different domain name when you configured EPM System products, select that domain.
- 5 Under **Select Extension Source**, select **Extend my domain automatically to support the following products**, and then select **Oracle WSM Policy Manager**, and then click **Next**.
- 6 From **Configure JDBC Data Sources**, modify the details for the JDBC data sources, as required, providing the password that you entered during RCU configuration, and then click **Next**.
- 7 From **Test Data Sources**, select the data sources to be tested, and then click **Test Connections**.

If the connections are working, a check mark is displayed under **Status**. If the connections are not working, go back to correct the JDBC data source details, and rerun the test.
- 8 Click **Next**.
- 9 From **Configure the JDBC Schema**, enter details for the OWSM `.mds` schema, and then click **Next**.
- 10 From **Test Component Schema**, select the component schema to be tested, and then click **Test Connections**.

If the connections are working, a check mark is displayed under **Status**. If the connections are not working, go back to correct the JDBC data source details, and rerun the test.

- 11 Click **Next**.
- 12 From **Select Optional Configuration**, select **Deployments and Services**, and then click **Next**.
- 13 From **Target Deployments to Clusters or Servers**, under **Target**, select the cluster or servers, and then check **mds-owsm** under **JDBC** to target the selected clusters or servers, and then click **Next**.
- 14 On the **Configuration Summary**, select a domain to review its attributes in the Details pane, and then click **Extend**. If required, click **Previous** to return to a screen to make any corrections.
- 15 On the **Extending Domain** screen, click **Done** when the extension is complete.

The WebLogic domain is now available for Web Services. See the *Oracle Hyperion Profitability and Cost Management New Features Guide*.
- 16 Restart the server machine, stop all EPM System services, and then start WebLogic Administration Server Console.

## Configuring the Keystore and Modifying the Credential Store

➤ To configure the keystore and modify the credential store:

- 1 Complete the steps in [“Configuring the Keystore for Oracle Web Services Manager” on page 276](#) to create a keystore and assign the keystore to the EPM System WebLogic domain.
- 2 From `MIDDLEWARE_HOME/oracle_common/common/bin`, run `wlst.cmd`.
- 3 Enter `connect()` and then enter the WebLogic Administrator user name and password.
- 4 Enter the following commands, in order:

```
createCred(map="oracle.wsm.security",key="epmpcm.credentials",user="orakey",password="welcome1",desc="User credentials Key")

updateCred(map="oracle.wsm.security",key="keystore-csf-key",user="orakey",password="welcome1",desc="Keystore Key")

updateCred(map="oracle.wsm.security",key="enc-csf-key",user="orakey",password="welcome1",desc="Encryption Key")

updateCred(map="oracle.wsm.security",key="sign-csf-key",user="orakey",password="welcome1",desc="Signing Key")
```

## Starting Web Services Policy Manager

➤ To start Web Services Policy Manager:

- 1 Log in to the WebLogic Administration Console using WebLogic administrator credentials. (`http://WebLogic_Admin_Host:WebLogic_Admin_Port/console`).
- 2 Navigate to **Servers, FoundationServices0, Deployments, wsm-pm, Control**.
- 3 Under **Start/Stop**, select **wsm-pm** and select **Start - Servicing All Requests** and then select **Yes**.

## Starting Managed Servers

- Start each managed server in the following order:
- WebLogic Administration Server
- Hyperion Foundation Services Managed Server
- Oracle HTTP Server - Oracle Process Manager (*ohsInstanceInstance Number*)
- Hyperion Profitability - Web Application

## Financial Close Management Postconfiguration Tasks

### Subtopics

- [Targeting WSM-PM and MDS-OWSM to Foundation Services](#)
- [Configuring the SOA Managed Server](#)
- [Configuring the Keystore for Oracle Web Services Manager](#)
- [Setting the `soa.oracle.home` Environment Variable](#)
- [Adding a Grant to `bpm-services.jar`](#)
- [Enabling EdnJmsMode](#)
- [Configuring for OAM](#)
- [Start Managed Servers](#)
- [Raising the Maximum Capacity in the Connection Pool](#)
- [Modifying the JTA Timeout](#)
- [Specifying the Language for E-Mail Notifications](#)
- [Reconfiguring External Providers \(Maintenance Release Only\)](#)

This section describes additional tasks required to configure Financial Close Management. Perform these tasks after you install and configure Oracle SOA Suite and Financial Close Management.

If you are applying the maintenance release to move from Financial Close Management Release 11.1.2.0 to Release 11.1.2.1, the only task you need to perform is [“Reconfiguring External Providers \(Maintenance Release Only\)”](#) on page 282.

---

**Caution!** You **must** perform these tasks before you can start and run Financial Close Management. Perform the tasks in the order in which they are listed.

---

The following table describes Financial Close Management postfiguration tasks.

**Note:** For the procedures that follow, note that if you selected Production Mode when you created the WebLogic domain, to make changes in the WebLogic Administration Console you must first click **Lock & Edit** in the Change Center. After you make the changes, click **Activate Changes** in the Change Center.



**Table 61** Financial Close Management Postconfiguration Tasks

| Task                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Reference                                                                                                                                               |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| To enable Lifecycle Management with Financial Close Management in a distributed environment, target WSM-PM and MDS-OWSM to Shared Services.                                                                                                                                                                                                                                                                                                                       | <a href="#">“Targeting WSM-PM and MDS-OWSM to Foundation Services” on page 273</a>                                                                      |
| Configure the SOA managed server.                                                                                                                                                                                                                                                                                                                                                                                                                                 | <a href="#">“Configuring the SOA Managed Server” on page 274</a>                                                                                        |
| Configure the keystore for Oracle Web Services Manager.                                                                                                                                                                                                                                                                                                                                                                                                           | <a href="#">“Configuring the Keystore for Oracle Web Services Manager” on page 276</a>                                                                  |
| If Financial Close Management and SOA are deployed on different machines, set the <code>soa.oracle.home</code> environment variable.                                                                                                                                                                                                                                                                                                                              | <a href="#">“Setting the <code>soa.oracle.home</code> Environment Variable” on page 278</a>                                                             |
| If Financial Close Management and SOA are deployed on different machines, add a grant to <code>bpm-services.jar</code> .                                                                                                                                                                                                                                                                                                                                          | <a href="#">“Adding a Grant to <code>bpm-services.jar</code>” on page 278</a>                                                                           |
| If you are using Microsoft SQL Server, enable <code>EdnJmsMode</code> .                                                                                                                                                                                                                                                                                                                                                                                           | <a href="#">“Enabling <code>EdnJmsMode</code>” on page 279</a>                                                                                          |
| If you are using Microsoft SQL Server or Oracle Database and you are using OAM for single sign-on, perform additional steps.                                                                                                                                                                                                                                                                                                                                      | <a href="#">“Configuring for OAM” on page 280</a>                                                                                                       |
| Start managed servers.                                                                                                                                                                                                                                                                                                                                                                                                                                            | <a href="#">“Start Managed Servers” on page 280</a>                                                                                                     |
| Raise the maximum capacity in the connection pool.                                                                                                                                                                                                                                                                                                                                                                                                                | <a href="#">“Raising the Maximum Capacity in the Connection Pool” on page 281</a>                                                                       |
| Modify the JTA Timeout.                                                                                                                                                                                                                                                                                                                                                                                                                                           | <a href="#">“Modifying the JTA Timeout” on page 281</a>                                                                                                 |
| To receive e-mail notifications in a language different from the default language specified on the SOA server, perform additional steps.                                                                                                                                                                                                                                                                                                                          | <a href="#">“Specifying the Language for E-Mail Notifications” on page 282</a>                                                                          |
| If you are using Microsoft SQL Server, there is a known issue with WebLogic and Logging Last Resource (LLR) datasources. The error comes from inserting/updating rows in a table used by LLR. To work around this issue, the DBA must drop the LLR table and recreate it with a larger column size.<br><b>Tip:</b> This step is needed only if the managed server for Financial Close Management has a name other than the default <code>FinancialClose0</code> . | <a href="http://download.oracle.com/docs/cd/E13222_01/wls/docs92/jta/llr.html">http://download.oracle.com/docs/cd/E13222_01/wls/docs92/jta/llr.html</a> |
| If you are using Microsoft SQL Server, remove <code>EDNLocalTxDataSource</code> and <code>EDNDataSource</code> .                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                         |
| <b>Maintenance Release Only</b><br>Reconfigure external providers.                                                                                                                                                                                                                                                                                                                                                                                                | <a href="#">“Reconfiguring External Providers (Maintenance Release Only)” on page 282</a>                                                               |
| Create and manage Integration Types.                                                                                                                                                                                                                                                                                                                                                                                                                              | <i>Oracle Financial Close Management Administrator's Guide.</i> You can download integration <code>xm1</code> files from My Oracle Support.             |

## Targeting WSM-PM and MDS-OWSM to Foundation Services

This procedure is required to enable Oracle Hyperion Enterprise Performance Management System Lifecycle Management with Financial Close Management in a distributed environment.

- To target WSM-PM AND MDS-OWSM to Foundation Services
- 1 Log in to WebLogic Administration Server Console if you are not already logged in.
- 2 To target `wsm-pm` to Foundation Services: In the WebLogic Administration Server Console, select **Deployments**, select **wsm-pm**, select the **Targets** tab, select **wsm-pm** and select **Change Targets**. Under **Clusters**, select **Foundation Services** and then select **Yes**. **FoundationServices** now appears under **Current Targets** for **wsm-pm** on the **Targets** tab.
- 3 To target `mds-owsm` to Foundation Services: In the WebLogic Administration Server Console, select **Services**, then **Datasources**. Select **mds-owsm**, select the **Targets** tab. Under **Clusters**, select **Foundation Services** and then click **Save**. **FoundationServices** now appears under **Targets** next to **mds-owsm** on the **Services, Datasources** page.

## Configuring the SOA Managed Server

### Subtopics

- [Setting the Listener Address on the SOA Server](#)
- [Connecting Oracle Internet Directory \(OID\), Microsoft Active Directory \(MSAD\), or SunOne to the SOA Server](#)
- [Configuring the E-mail Driver](#)

### Setting the Listener Address on the SOA Server

When you are configuring a new SOA Server, ensure that you configure the listener address properly so that Financial Close Management can identify the SOA Server location by querying the Administration Server repository.

- To set the listener address on the SOA Server:
- 1 Log in to the WebLogic Administration Console if you are not already logged in.
- 2 Set **Listen address** to the *hostname* of the SOA Server in two places:
  - Select **Environment**, then **Servers**, and then `soa_server1`.
  - Select **Environment**, then **Machines**, then **LocalMachine**, and then **Node Manager**.

### Connecting Oracle Internet Directory (OID), Microsoft Active Directory (MSAD), or SunOne to the SOA Server

This procedure is required to configure the SOA Server to communicate with an external provider, such as OID, MSAD, or SunOne. Shared Services must also be configured to work with this external provider. Follow the sections specific to your provider.

**Note:** Financial Close Management does not support Shared Services Native Directory. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide* for more information.

➤ To connect OID, MSAD, or SunOne to the SOA Server:

- 1 Log in to the WebLogic Administration Console if you are not already logged in.
- 2 Click **Security Realms** on the left, click **myrealm**, and then click the **Providers** tab.
- 3 Click **Add**, enter the following details, and then click **OK**.

For OID:

- Name - **OID**
- Type - **OracleIntenetDirectoryAuthenticator**

For MSAD:

- Name - **MSAD**
- Type - **ActiveDirectoryAuthenticator**

For SunOne:

- Name - **SunOne**
- Type - **IPlanetAuthenticator**

You can ignore the prompt to restart the server; you will be restarting at the end of this procedure.

- 4 Click the provider you just added, click the **Provider Specific** tab, enter the following details for your provider, and then click **OK**.
  - Host
  - Port
  - Principal
  - Credential
  - User Base DB
  - Group Base DB
  - User from Name Filter (MSAD only)
  - User Name Attribute (MSAD only)

You can leave the rest of the default values unchanged.

- 5 Click **OID**, **MSAD**, or **SunOne**, and for **Control Flag**, select **SUFFICIENT**.
- 6 Restart WebLogic Server.

## Configuring the E-mail Driver

► To configure the e-mail driver:

- 1 Go to Oracle Enterprise Manager for the SOA server: `http://WebLogic_Admin_Host:WebLogic_Admin_Port/em` and log in as the WebLogic administrator user.
- 2 Expand the **User Messaging Service** folder, right-click **usermessagingdriver-email(soa\_server1)**, and select **Email Driver Properties**.
- 3 Specify the following properties, and then click **Apply**.
  - **OutgoingMailServer** - enter the mail server name, for example: *myMailServer.myCompany.com*
  - **OutgoingMailServerPort** - specify the port for the mail server.
  - **OutgoingMailServerSecurity** - SSL is recommended.
  - **OutgoingUserName** - specify a valid e-mail address.
  - **OutgoingPassword - Type of Password** - select **Clear Text**.
  - **OutgoingPassword - Password** - specify the password for the **OutgoingUserName** you specified.
- 4 In the left panel, expand the **SOA** folder, right-click **soa-infra (soa\_server1)**, click **SOA Administration**, and then select **Workflow Notification Properties**.
- 5 Specify the following properties, and then click **Apply**.
  - **Notification Mode** - select **ALL** or **EMAIL**.
  - **Email: From Address** - specify a valid e-mail address.
- 6 Restart the SOA Server.
- 7 Go to Oracle Enterprise Manager to test the human workflow notification settings:
  - a. Expand the **SOA** folder, right-click **soa-infra (soa\_server1)**, select **Service Engines**, then **Human Workflow**, select the **Notification Management** tab, and then click **Send Test Notification**.
  - b. Enter a valid **SentTo** e-mail address, select **EMAIL** as the channel, enter a test message, and then click **Send**.
  - c. Verify that you received the e-mail message.

## Configuring the Keystore for Oracle Web Services Manager

Set up the Keystore for message protection and configure the Credential Store Provider.

**Tip:** If you have not yet deployed Oracle Enterprise Manager, you must deploy it before completing this procedure. EPM System Installer installs Enterprise Manager but does not deploy it. To deploy it, use the WebLogic Configuration Wizard to extend the domain with the Oracle Enterprise Manager template.

The Financial Close Management client and the Financial Management Web service use the following policies:

- wss11\_saml\_token\_with\_message\_protection\_client\_policy
- wss11\_saml\_token\_with\_message\_protection\_service\_policy

➤ To set up the keystore used by Web Services Manager:

### 1 Create a Keystore.

See “How to Create and Use a Java Keystore” in the “Setting up the Keystore for Message Protection” section of the *Oracle Fusion Middleware Security and Administrator's Guide for Web Services 11g Release 1 (11.1.1)*. ([http://download.oracle.com/docs/cd/E14571\\_01/web.1111/b32511/setup\\_config.htm#BABJHIBI](http://download.oracle.com/docs/cd/E14571_01/web.1111/b32511/setup_config.htm#BABJHIBI)).

Use the `keytool` to create a Java keystore. For example, go to `/Oracle/Middleware/user_projects/$DOMAIN_HOME/config/fmwconfig` in the server running the WebLogic Administration Server hosting your EPM System domain and execute the following command to add a key pair to the keystore:

```
keytool -genkeypair -keyalg RSA -alias orakey -keypass welcome1 -keystore default-keystore.jks -storepass welcome1 -validity 3600
```

This command creates a keystore with the name `default-keystore.jks` if it does not already exist and adds a new private key entry with alias `'orakey'` and password `welcome1` to it. You can change the alias, password, and domain name as needed in the command.

**Note:** If the `keytool` command is not recognized, the `Path` environmental variable might not include JDK. Add the JDK to the `Path` variable using the following command:

```
set PATH=%PATH%;C:\Oracle\Middleware\JDK160_21\bin\; ;.
```

### 2 Assign the Keystore to the EPM System WebLogic domain.

See “Setting up the Keystore for Message Protection” in the *Oracle® Fusion Middleware Security and Administrator's Guide for Web Services 11g Release 1 (11.1.1)* [http://download.oracle.com/docs/cd/E14571\\_01/web.1111/b32511/setup\\_config.htm#BABJHIBI](http://download.oracle.com/docs/cd/E14571_01/web.1111/b32511/setup_config.htm#BABJHIBI).

- a. Using the Enterprise Manager – Fusion Middleware control, in the Navigator pane, expand **WebLogic Domain** to show the domain for which you need to configure the keystore, and then select the domain.
- b. Using Fusion Middleware Control, click **WebLogic Domain**, right-click to go to **Security**, and then **Security Provider Configuration**. Click the plus sign (+) to expand the **Keystore** control near the bottom of the page, and then click **Configure**.

The Web Services Manager Keystore Configuration page is displayed.

- c. If it is not already selected, click the **Configure Keystore Management** box.
- d. Enter the path and name for the keystore that you created. By default, the keystore name is `default-keystore.jks`, but you can change this. However you cannot change the keystore type. It must be `JKS`.

- e. Enter a password for the keystore and confirm it.
- f. Enter an alias and password for the signature and encryption keys. Confirm the passwords.

The alias and password for the signature and encryption keys define the string alias and password used to store and retrieve the keys.

- g. Click **OK** to submit the changes.

Note that changing any of the fields on this page requires a restart of Oracle Enterprise Manager Fusion Middleware Control to take effect.

**Note:** Copy the keystore (default-keystore.jks) and the cwallet.sso files to \$DOMAIN\_HOME/config/fmwconfig on every machine that hosts either the admin server or the managed server of the WebLogic domain. For a single node installation, there is only one machine that hosts the admin and managed servers. For a distributed node installation, the managed servers can be spread over many machines.

## Setting the soa.oracle.home Environment Variable

This procedure is required in a distributed environment when Financial Close Management and SOA are configured on different machines.

► To set the soa.oracle.home environment variable:

- 1 On the machine on which Financial Close Management is installed, shut down all the managed servers.
- 2 Make a backup copy of setDomainEnv.cmd | .sh, which is in *MIDDLEWARE\_HOME*/user\_projects/domains/bin.
- 3 Edit setDomainEnv.cmd | .sh and add the following line before `if "%JAVA_VENDOR%...`. Leave a blank line before and after the added text:

```
set SOA_ORACLE_HOME=InstallationLocLocation\Oracle_SOA1
```

For example: `set SOA_ORACLE_HOME=C:\Oracle\Middleware\Oracle_SOA1`

- 4 Add the following option to the *EXTRA\_JAVA\_PROPERTIES* variable.

```
-Dsoa.oracle.home=%SOA_ORACLE_HOME%
```

## Adding a Grant to bpm-services.jar

This procedure is required in a distributed environment when Financial Close Management and SOA are configured on different machines. Perform this procedure on all machines with managed servers in the WebLogic domain.

► To add a grant to bpm-services.jar:

- 1 Make a backup copy of *domain/config/fmwconfig/system-jazn-data.xml*.
- 2 Edit *system-jazn-data.xml* to include the following grant for bpm-services.jar:

```

<grant>
 <grantee>
 <codesource>
 <url>file:${soa.oracle.home}/soa/modules/oracle.soa.workflow_11.1.1/
bpm-services.jar</url>
 </codesource>
 </grantee>
 <permissions>
 <permission>
 <class>oracle.security.jps.JpsPermission</class>
 <name>VerificationService.createInternalWorkflowContext</name>
 </permission>
 <permission>
 <class>oracle.security.jps.service.credstore.CredentialAccessPermissi
on</class>
 <name>credstoressp.credstore.BPM-CRYPTO.BPM-CRYPTO</name>
 <actions>read,write</actions>
 </permission>
 <permission>
 <class>oracle.security.jps.JpsPermission</class>
 <name>IdentityAssertion</name>
 <actions>*</actions>
 </permission>
 </permissions>
</grant>

```

### 3 Restart all managed servers.

## Enabling EdnJmsMode

This procedure is required only if you are using Microsoft SQL Server.

► To enable EdnJmsMode:

- 1 Log in to Oracle Enterprise Manager Console (<http://host:7001/em>).
- 2 Expand SOA.
- 3 Right-click `soa-infra`.
- 4 Select **SOA Administration**.
- 5 Select **Common Properties**.
- 6 Scroll down and click **More SOA Infra Advanced Configuration Properties**.
- 7 Change the attribute `EdnJmsMode` from `False` to `True`, and then click **Apply**.
- 8 Restart the managed server.

## Configuring for OAM

- If you are using Microsoft SQL Server or Oracle Database and OAM for single sign-on, perform the following procedure:

- 1 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)).
- 2 In the Domain Structure portlet, click **Security Realms**.
- 3 From the available realms, click the realm name with **Default Realm status** `True`.

**Tip:** Click the realm name, not the check box.

- 4 Click the **Providers** tab to list all configured Authentication/Assertion providers.
- 5 Under Authentication Providers, click **New**.
- 6 Select **OAMIdentityAsserter** from the list of supported Authentication/Assertion providers, then in the **Create a New Authentication Provider** panel, specify a name for the provider, such as **OAMIdentityAsserter**, and then click **OK**.

**OAMIdentityAsserter** is now listed in the list of configured providers.

- 7 Reorder the providers in the following order:
  - MSAD, OID, or SunOne, depending on which provider you are using
  - OAM IdentityAsserter
  - Default Authenticator
  - Default IdentityAsserter

## Start Managed Servers

- Start each managed server in the following order:
- WebLogic Administration Server
  - Hyperion Foundation Services Managed Server
  - Oracle HTTP Server - Oracle Process Manager (*ohsInstanceInstance Number*)
  - In any order:
    - Financial Close Management Web application
    - Financial Management Web Services Managed Server, if you're using Financial Management with Financial Close Management.
    - FDM Web application, if you're using FDM with Financial Close Management.
    - Financial Reporting Web application, if you're using Financial Reporting with Financial Close Management.
  - Oracle SOA managed server



## Raising the Maximum Capacity in the Connection Pool

If necessary, fine tune the data source to size the connection pool.

➤ To raise the maximum capacity in the connection pool:

- 1 In the **WebLogic Administration Console** ([http://WebLogic\\_Admin\\_Host:WebLogic\\_Admin\\_Port/console](http://WebLogic_Admin_Host:WebLogic_Admin_Port/console)), select **Services**, then **JDBC**, and then **Datasources**.
- 2 Select your data source, then **Connection Pool**, and then **Maximum Capacity**.
- 3 Edit settings to increase capacity as follows:
  - `financialclose_datasource`—150

If resource errors specific to these data sources are logged, increase their capacity:

- `EDNDataSource` (Oracle Database only)
- `EDNLocalTxDataSource` (Oracle Database only)
- `mds-owsm`
- `mds-soa`
- `EPMSysRegistry`
- `OraSDPMDDataSource`
- `SOADDataSource`
- `SOALocalTxDataSource`

**Note:** You can increase the capacity for each data source by a different amount, depending on the needs for your installation.

If the Financial Close Management log includes this error message:

```
java.sql.SQLException: Could not retrieve datasource via JNDI url 'jdbc/
data_source' weblogic.jdbc.extensions.PoolDisabledSQLException:
weblogic.common.resourcepool.ResourceDisabledException: Pool data
source is Suspended, cannot allocate resources to applications..], then you
have exceeded the maximum connections allowed in the connection pool for the specified data
source, and you need to increase the capacity of the connection pool.
```

## Modifying the JTA Timeout

Modify the JTA timeout.

► To modify the JTA timeout:

- 1 In the **WebLogic Administration Console** ([http://WebLogic\\_Admin\\_Host:WebLogic\\_Admin\\_Port/console](http://WebLogic_Admin_Host:WebLogic_Admin_Port/console)), select **Domain Structure**, then **Services**, and then **JTA**.
- 2 From the **JTA** tab, change **Timeout Seconds** to 300.
- 3 Click **Save** and then **Activate Changes** to apply the change.

## Specifying the Language for E-Mail Notifications

To receive e-mail notifications in a language different from the default language specified on the SOA server, specify the user's language preference in the identity store.

For example, with an LDAP-based identity store:

1. Connect to the identity store.
2. Navigate to the user entry.
3. Add or set the `preferredLanguage` attribute.

## Reconfiguring External Providers (Maintenance Release Only)

After you have applied the maintenance to move from Financial Close Management Release 11.1.2.0 to Release 11.1.2.1, if you are using an external provider, perform the following tasks to reconfigure the SOA Server to communicate with an external provider, such as OID, MSAD, or SunOne.

► To reconfigure an external provider:

- 1 Shut down all servers (SOA Server, WebLogic Administration Server).
- 2 Navigate to `domain/config/fmwconfig` and open `jps-config.xml` in a text editor.
- 3 Remove the `<serviceInstance>` entry that was added during Release 11.1.2.1 installation, with the name `idstore.AD` (for MSAD), `idstore.OID` (for OID), or `idstore.IPLANET` (for SunOne).
- 4 In the `<default>` context, remove the line that includes the service instance reference you just deleted. For example, in the following entry for MSAD, remove `<serviceInstanceRef ref="idstore.AD" />`.

```
<jpsContext name="default">
<serviceInstanceRef ref="credstore" />
<serviceInstanceRef ref="keystore" />
<serviceInstanceRef ref="policystore.xml" />
<serviceInstanceRef ref="audit" />
<serviceInstanceRef ref="idstore.AD" />
</jpsContext>
```

Make sure the entry `idstore.ldap` exists in the default context.

- 5 Start WebLogic Administration Server, and log in to the WebLogic Administration Console.

- 6 Click **Security Realms** on the left, click **myrealm**, and then click the **Providers** tab.
- 7 Delete the external provider (MSAD, OID, or SunOne).
- 8 Restart WebLogic Administration Server, and log in to the WebLogic Administration Console.
- 9 Click **Security Realms** on the left, click **myrealm**, and then click the **Providers** tab.
- 10 Click **Add**, and re-add the external provider.

For details about adding an external provider, see [“Connecting Oracle Internet Directory \(OID\), Microsoft Active Directory \(MSAD\), or SunOne to the SOA Server”](#) on page 274.

- 11 Restart Start WebLogic Administration Server.

## FDM Postconfiguration Tasks

The following table describes FDM postconfiguration tasks.

**Table 62** FDM Postconfiguration Tasks

| Task                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Reference                                                                                                                                                                                                                                                                                                                                                                                                        |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Configure FDM and create FDM applications. EPM System Configurator only registers FDM with Shared Services. The remainder of the configuration is done in FDM. Configuration tasks for a new installation or a maintenance release include:</p> <ul style="list-style-type: none"> <li>● Configuring Web server components</li> <li>● Configuring Task Manager</li> <li>● Configuring Application Server components</li> <li>● Configuring Load Balance Manager</li> <li>● Configuring Workbench</li> <li>● Setting up FDM applications</li> <li>● Configuring adapters</li> <li>● Upgrading applications using the Schema Update Utility, if you are applying the maintenance release.</li> </ul> <p><b>Upgrade Note!</b></p> <p>If you are upgrading, configure FDM and upgrade applications. When you are upgrading FDM, configuration tasks include:</p> <ul style="list-style-type: none"> <li>● Configuring Web server components</li> <li>● Configuring Task Manager</li> <li>● Configuring application server components</li> <li>● Configuring Load Balance Manager</li> <li>● Configuring Workbench</li> <li>● Upgrading applications using the Schema Update Utility. If you replicated data to a new location, you are first prompted to add applications. When you add applications, for each application, specify the replicated FDM data folder and the database information.</li> <li>● Configuring adapters</li> <li>● If the earlier release of FDM did not use Shared Services security, transferring users and groups for the first time to Shared Services.</li> </ul> | <p>See the <i>Oracle Hyperion Financial Data Quality Management Configuration Guide</i> for information about configuring FDM.</p> <p>If you are installing FDM for the first time or applying the maintenance release to move from FDM Release 11.1.2.0 to Release 11.1.2.1, see “Installations and Maintenance Releases.”</p> <p>If you are upgrading from an earlier release of FDM, see “Upgrading FDM.”</p> |

## ERP Integrator Postconfiguration Tasks

The following table describes ERP Integrator postconfiguration tasks.

**Table 63** ERP Integrator Postconfiguration Tasks

| Task                                                          | Reference                                                                                                                      |
|---------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| Configure Oracle Data Integrator to work with ERP Integrator. | <i>Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications Administrator's Guide</i> |

## Data Relationship Management Postconfiguration Tasks

The following table describes Data Relationship Management postconfiguration tasks.

**Table 64** Data Relationship Management Postconfiguration Tasks

| Task                                                | Reference                                                              |
|-----------------------------------------------------|------------------------------------------------------------------------|
| Install and configure Data Relationship Management. | <i>Oracle Hyperion Data Relationship Management Installation Guide</i> |



# Starting and Stopping EPM System Products

---

## In This Chapter

|                                               |     |
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| Using a Single Script to Start Services ..... | 285 |
| Summary List of Services and Processes .....  | 286 |
| Services and Processes .....                  | 288 |
| Launching Clients .....                       | 308 |

This chapter identifies how to start EPM System products and lists them in the order in which Oracle recommends that they be started. This chapter also provides default URLs for EPM System products.

Before you start any services or processes, start all databases used as repositories.

**Note:** Some services or processes take longer than others to start, and startup times may vary by computer.

If you selected **Run Windows Services as non-local system account** and specified a user name and password on the “Configure Common Settings” panel of EPM System Configurator, Windows services are started using the specified user name. If you do not specify a user name and password, EPM System Configurator creates Windows services using the local system account. Before you start the services, change them to use the appropriate domain account.

Note that Start menu items for Web applications are available only on the machine on which the Web server is installed.

---

**Caution!** If you started the SOA Server to configure Financial Close Management, stop it before starting EPM System services. If you are using Financial Close Management, see the required service startup order in “[Financial Close Management Application Server](#)” on page 305.

---

## Using a Single Script to Start Services

EPM System Installer installs a single start script in `EPM_ORACLE_INSTANCE/bin`, called `start.bat|sh`. Running the single start script on a machine in your EPM System deployment starts all EPM System services installed on that machine.

To launch the single start script from the Start menu, Select Start, then Programs, then Oracle EPM System, then Foundation Services, and then Start EPM System. Run this start script on each machine in your environment.

The single start script works by calling the individual start scripts for every product in the recommended startup order, specified in [“Summary List of Services and Processes” on page 286](#). Before you can use a service in this list, services preceding it in the list must be started. When you use the single start script, some services may start before services they depend on start (because startup times vary). When this happens, you may need to wait to use some services while other services finish initializing.

After the single start script completes, you can run EPM System Diagnostics to determine which services on a machine are running. See [Chapter 9, “Validating the Installation and Verifying Deployment.”](#)

A single stop script, `stop.bat | sh` is also installed in `EPM_ORACLE_INSTANCE/bin`. Running the stop script on a machine in your EPM System deployment stops all EPM System products on that machine.

## Summary List of Services and Processes

The following EPM System product services and processes are listed below in their recommended startup order.

---

**Caution!** If you started the SOA Server to configure Financial Close Management, stop it before starting EPM System services. If you are using Financial Close Management, see the required service startup order in [“Financial Close Management Application Server” on page 305](#).

---

1. Databases for repositories.
2. Any corporate user directories that you plan to configure for use with Shared Services.
3. Foundation Services Managed Server application server, which includes Shared Services, and EPM Workspace.
4. Reporting and Analysis Framework — Agent Service (if required for your environment)
5. Reporting and Analysis Framework Application Server (if required for your environment)
6. Web server

The remaining services and processes can be started in any order:

1. Performance Management Architect Services
2. Performance Management Architect application server
3. Performance Management Architect Data Synchronizer application server
4. Essbase Server
5. Administration Services application server

6. Integration Services Server
7. Essbase Studio Server
8. Provider Services application server
9. Financial Reporting Services
10. Financial Reporting application server
11. Web Analysis application server
12. Calculation Manager application server
13. Planning application server and the Hyperion RMI Registry
14. Financial Management service
15. Financial Management Web application server
16. Strategic Finance service
17. Performance Scorecard application server
18. Performance Scorecard Alerter application server
19. Profitability and Cost Management application server
20. Disclosure Management application server
21. Financial Close Management application server.

---

**Caution!** If you started the SOA Server to configure Financial Close Management, stop it before starting EPM System services. If you are using Financial Close Management, see the required service startup order in [“Financial Close Management Application Server” on page 305](#).

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22. Data Relationship Management services
23. FDM Task Manager service
24. ERP Integrator - Web Application

# Services and Processes

## Subtopics

- [Databases for Repositories](#)
- [Corporate User Directories](#)
- [Foundation Services Managed Server Application Server](#)
- [Hyperion Reporting and Analysis Framework - Agent Service](#)
- [Reporting and Analysis Framework Application Server](#)
- [Web Server](#)
- [Performance Management Architect Server Services](#)
- [Performance Management Architect Application Server](#)
- [Performance Management Architect Data Synchronizer Application Server](#)
- [Essbase Server](#)
- [Administration Services Server](#)
- [Integration Services Server](#)
- [Essbase Studio Server](#)
- [Provider Services Application Server](#)
- [Financial Reporting Services](#)
- [Financial Reporting Application Server](#)
- [Web Analysis Application Server](#)
- [Calculation Manager Application Server](#)
- [Planning Application Server](#)
- [Financial Management Services](#)
- [Financial Management Application Server](#)
- [Strategic Finance](#)
- [Performance Scorecard Application Server](#)
- [Performance Scorecard Alerter Application Server](#)
- [Profitability and Cost Management Application Server](#)
- [Disclosure Management Application Server](#)
- [Financial Close Management Application Server](#)
- [Data Relationship Management](#)
- [FDM](#)
- [ERP Integrator Application Server](#)

The services and processes discussed in this topic are listed in the order in which Oracle recommends that they be started.

## Databases for Repositories

Databases for repositories.

## Corporate User Directories

Any corporate user directories that you plan to configure for use with Shared Services. See the vendor documentation for startup instructions.



## Foundation Services Managed Server Application Server

The following table describes the services and processes for the Foundation Services Managed Server application server, which includes Shared Services, and EPM Workspace Web applications.

**Table 65** Foundation Services Managed Server Application Server Services and Processes

| Information Type                                      | Details                                                                                                                                                          |
|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Foundation Services, and then Start Foundation Services                                                |
| <b>Registered Service Name</b>                        | HyS9Foundation Services                                                                                                                                          |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Foundation Services - Managed Server                                                                                                                    |
| <b>Description</b>                                    | Hyperion Foundation Services support Hyperion applications, including authentication, user provisioning, task flow management, data and metadata synchronization |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startFoundationServices.bat</i>                                                                                                       |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startFoundationServices.sh</i>                                                                                                        |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopFoundationServices.bat</i>                                                                                                        |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopFoundationServices.sh</i>                                                                                                         |

## Hyperion Reporting and Analysis Framework - Agent Service

The following table describes the services and processes for the Reporting and Analysis Framework Agent.

**Table 66** Reporting and Analysis Framework Agent

| Information Type                                      | Details                                                                                                                                |
|-------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Reporting and Analysis, and then Start Reporting and Analysis Agent Services |
| <b>Registered Service Name</b>                        | HyS9RaFrameworkAgent                                                                                                                   |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Reporting and Analysis Framework                                                                                              |
| <b>Description</b>                                    | HyS9RaFrameworkAgent - Hyperion Reporting and Analysis Framework Agent                                                                 |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startRaFrameworkAgent.bat</i>                                                                               |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startRaFrameworkAgent.sh</i>                                                                                |

| Information Type           | Details                                                 |
|----------------------------|---------------------------------------------------------|
| <b>Windows Stop Script</b> | <i>EPM_ORACLE_INSTANCE/bin/stopRaFrameworkAgent.bat</i> |
| <b>UNIX Stop Script</b>    | <i>EPM_ORACLE_INSTANCE/bin/stopRaFrameworkAgent.sh</i>  |

## Services and Processes Started with Reporting and Analysis Framework Agent Service

When the Reporting and Analysis Framework Agent is started, these additional services and processes are started:

- Interactive Reporting process.
- Reporting and Analysis Framework common services and processes

## Reporting and Analysis Framework Application Server

The following table describes the services and processes for the Reporting and Analysis Framework application server.

**Table 67** Reporting and Analysis Framework Application Server

| Information Type                                      | Details                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Reporting and Analysis, then Start Reporting and Analysis Framework Application<br><br>This menu item starts: <ul style="list-style-type: none"> <li>• Reporting and Analysis Framework Web application</li> <li>• Reporting and Analysis Framework Agent Service</li> </ul> |
| <b>Registered Service Name</b>                        | HyS9RaFramework                                                                                                                                                                                                                                                                                                                        |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Reporting and Analysis Framework - Web Application                                                                                                                                                                                                                                                                            |
| <b>Description</b>                                    | HyS9RaFramework - Hyperion Reporting and Analysis Framework web application                                                                                                                                                                                                                                                            |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startRaFramework.bat</i>                                                                                                                                                                                                                                                                                    |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startRaFramework.sh</i>                                                                                                                                                                                                                                                                                     |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopRaFramework.bat</i>                                                                                                                                                                                                                                                                                     |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopRaFramework.sh</i>                                                                                                                                                                                                                                                                                      |

## Web Server

The following table describes the services and processes for the Web server. EPM System Installer installs Oracle HTTP Server.

The Oracle HTTP Server service is managed with OPMN.

For information about OPMN, see the Oracle® Fusion Middleware Oracle Process Manager and Notification Server Administrator's Guide Release 11g (11.1.1.2.0) ([http://download.oracle.com/docs/cd/E15523\\_01/doc.1111/e14007/toc.htm](http://download.oracle.com/docs/cd/E15523_01/doc.1111/e14007/toc.htm))

**Table 68** Web Server Services and Processes

| Information Type                                                                              | Details                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Display Name in Windows Services Control Panel</b>                                         | <ul style="list-style-type: none"><li>● Oracle Process Manager (ohsInstanceInstanceNumber)<br/>Note that this menu command directs to the start script, which redirects Oracle HTTP Server to start using OPMN. The OPMN start script <code>opmnctl.bat</code> is located in <code>EPM_ORACLE_INSTANCE/httpConfig/ohs/bin</code>.</li><li>● IIS: IIS Admin Service</li></ul> |
| <b>Description</b>                                                                            | <ul style="list-style-type: none"><li>● N/A</li><li>● IIS: Enables this server to administer Web and FTP services. If this service is stopped, the server will be unable to run Web, FTP, NNTP, or SMTP sites or configure IIS. If this service is disabled, any services that explicitly depend on it will fail to start.</li></ul>                                         |
| <b>Windows Startup Script (For Oracle HTTP Server installed by EPM System Installer only)</b> | <p><code>EPM_ORACLE_INSTANCE/bin/startOHS.bat</code></p> <p>Note that this start script redirects Oracle HTTP Server to start using OPMN. The OPMN start script <code>opmnctl.bat</code> is located in <code>EPM_ORACLE_INSTANCE/httpConfig/ohs/bin</code>.</p>                                                                                                              |
| <b>UNIX Startup Script (For Oracle HTTP Server installed by EPM System Installer only)</b>    | <p><code>EPM_ORACLE_INSTANCE/bin/startOHS.sh</code></p> <p>Note that this start script redirects Oracle HTTP Server to start using OPMN. The OPMN start script <code>opmnctl</code> is located in <code>EPM_ORACLE_INSTANCE/httpConfig/ohs/bin</code></p>                                                                                                                    |
| <b>Windows Stop Script (For Oracle HTTP Server installed by EPM System Installer only)</b>    | <p><code>EPM_ORACLE_INSTANCE/bin/stopOHS.bat</code></p>                                                                                                                                                                                                                                                                                                                      |

| Information Type                                                                        | Details                                   |
|-----------------------------------------------------------------------------------------|-------------------------------------------|
| <b>UNIX Stop Script (For Oracle HTTP Server installed by EPM System Installer only)</b> | <i>EPM_ORACLE_INSTANCE/bin/stopOHS.sh</i> |

## Performance Management Architect Server Services

The following table describes the services and processes for the Performance Management Architect services.

**Table 69** Performance Management Architect Services

| Information Type                                      | Details                                                                                                                                                       |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | N/A                                                                                                                                                           |
| <b>Registered Service Name</b>                        | EPMA_Server                                                                                                                                                   |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion EPMA Server                                                                                                                                          |
| <b>Description</b>                                    | Hyperion EPM Architect Dimension Server provides the back services needed by the EPMA Web Tier, including dimensionality, applications, and the jobs console. |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/StartEpmaServer.bat</i>                                                                                                            |
| <b>UNIX Startup Script</b>                            | NA                                                                                                                                                            |
| <b>Windows Stop Script</b>                            | <ul style="list-style-type: none"> <li>Process Manager: <i>EPM_ORACLE_INSTANCE/bin/stopEpmaServer.bat</i></li> </ul>                                          |
| <b>UNIX Stop Script</b>                               | NA                                                                                                                                                            |

## Performance Management Architect Application Server

The following table describes the services and processes for the Performance Management Architect application server.

**Table 70** Performance Management Architect Application Server Services and Processes

| Information Type                  | Details                                                                                                                                              |
|-----------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b> | Select Start, then Programs, then Oracle EPM System, then Foundation Services, then Performance Management Architect, and then Start Web Application |
| <b>Registered Service Name</b>    | HyS9EPMAWebTier                                                                                                                                      |

| Information Type                                      | Details                                                |
|-------------------------------------------------------|--------------------------------------------------------|
| <b>Display Name in Windows Services Control Panel</b> | Hyperion EPMA Web Tier - Web Application               |
| <b>Description</b>                                    | Provide access service to EPMA Web Server              |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startEpmaWebReports.bat</i> |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startEpmaWebReports.sh</i>  |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopEpmaWebReports.bat</i>  |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopEpmaWebReports.sh</i>   |

In addition, Performance Management Architect has a Web tier component that runs in IIS.

## Performance Management Architect Data Synchronizer Application Server

The following table describes the services and processes for the Performance Management Architect Data Synchronizer application server.

**Table 71** Performance Management Architect Data Synchronizer Application Server Services

| Information Type                                      | Details                                                                                                                                                |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Foundation Services, then Performance Management Architect, and then Start Data Synchronizer |
| <b>Registered Service Name</b>                        | HyS9EPMDataSynchronizer                                                                                                                                |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion EPMA Data Synchronizer - Web Application                                                                                                      |
| <b>Description</b>                                    | Provide access service to EPMA Data Synchronizer Web Server                                                                                            |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startEPMDataSync.bat</i>                                                                                                    |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startEPMDataSync.sh</i>                                                                                                     |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopEPMDataSync.bat</i>                                                                                                     |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopEPMDataSync.sh</i>                                                                                                      |

## Essbase Server

During installation, EPM System Installer installs OPMN and registers Essbase Server for OPMN. OPMN manages the Essbase Agent, which manages the Essbase Server.

In a Windows environment, before you launch Essbase, change the OPMN service (Oracle Process Manager (*instanceName*)) to start as a named user so that the shared network files are accessible.

Navigate to `EPM_ORACLE_INSTANCE/bin` and use the following commands to start and stop Essbase Server:

- `opmnctl startproc ias-component=EssbaseInstanceName` or `./opmnctl startall`
- `opmnctl restartproc ias-component=EssbaseInstanceName`
- `opmnctl stopproc ias-component=EssbaseInstanceName`
- `opmnctl status`

where *EssbaseInstanceName* is one of the following:

- If you have not implemented clustering, *EssbaseInstanceName* is the name of the Essbase instance that you entered on the “Essbase Server Configuration” page during configuration with EPM System Configurator.
- If you have implemented clustering, *EssbaseInstanceName* is the name of the Essbase cluster that you entered on the “Set up Essbase Clusters” page during configuration with EPM System Configurator.

If you are using Essbase in a clustered environment, there are additional steps required to set up Essbase failover on both nodes of the cluster. See “[Setting Up Active-Passive Essbase Clusters](#)” on page 252.

The following table describes additional methods for starting and stopping Essbase Server. Note that the Essbase Server start and stop scripts redirect to OPMN.

For information about OPMN, see the Oracle® Fusion Middleware Oracle Process Manager and Notification Server Administrator's Guide Release 11g (11.1.1.2.0) ([http://download.oracle.com/docs/cd/E15523\\_01/doc.1111/e14007/toc.htm](http://download.oracle.com/docs/cd/E15523_01/doc.1111/e14007/toc.htm))

**Table 72** Starting and Stopping Essbase Server

| Information Type                                      | Details                                                                                                                                                                                        |
|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Essbase, then Essbase Server, and then Start Essbase<br>This command launches <code>startEssbase.bat</code> (and redirects to OPMN). |
| <b>Registered Service Name</b>                        | Oracle Process Manager ( <i>instanceName</i> )                                                                                                                                                 |
| <b>Display Name in Windows Services Control Panel</b> | Oracle Process Manager ( <i>instanceName</i> )                                                                                                                                                 |
| <b>Description</b>                                    | N/A                                                                                                                                                                                            |

| Information Type              | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Startup Script</b> | <ul style="list-style-type: none"> <li>● Essbase Server – <code>EPM_ORACLE_INSTANCE/bin/startEssbase.bat</code> (redirects to OPMN)</li> </ul> <p>Each instance of Essbase Server has its own startup script. If you configured an additional instance of Essbase, <code>startEssbase.bat sh</code> is located in <i>additionalInstanceLocation/bin</i>. Launch the start script from this location to launch this instance of Essbase.</p> <ul style="list-style-type: none"> <li>● ESSCMD – <code>EPM_ORACLE_INSTANCE/EssbaseServer/EssbaseServerInstanceName/bin/startEsscmd.bat</code> (also available in the <code>/EssbaseClient</code> directory)</li> <li>● essmsh – <code>EPM_ORACLE_INSTANCE/EssbaseServer/EssbaseServerInstanceName/bin/startMaxl.bat</code> (also available in the <code>/EssbaseClient</code> directory)</li> </ul> <p>All the scripts call <code>setEssbaseEnv.bat</code> to set up <code>ESSBASEPATH</code>, <code>ARBORPATH</code>, and <code>PATH</code> before starting.</p>                                                                                              |
| <b>UNIX Startup Script</b>    | <ul style="list-style-type: none"> <li>● Essbase Server – <code>EPM_ORACLE_INSTANCE/bin/startEssbase.sh</code> (redirects to OPMN)</li> </ul> <p>Each instance of Essbase Server has its own startup script. If you configured an additional instance of Essbase, <code>startEssbase.bat sh</code> is located in <i>additionalInstanceLocation/bin</i>. Launch the start script from this location to launch this instance of Essbase.</p> <ul style="list-style-type: none"> <li>● ESSCMD – <code>EPM_ORACLE_INSTANCE/EssbaseServer/EssbaseServerInstanceName/bin/startEsscmd.sh</code> (also available in the <code>/EssbaseClient</code> directory)</li> <li>● essmsh – <code>EPM_ORACLE_INSTANCE/EssbaseServer/EssbaseServerInstanceName/bin/startMaxl.sh</code> (also available in the <code>/EssbaseClient</code> directory)</li> </ul> <p>All the scripts call <code>hyperionenv.doc</code> to set up <code>ESSBASEPATH</code>, <code>ARBORPATH</code>, and <code>PATH</code> before starting.</p> <p>When running Essbase manually from a console, the console cannot be set to UTF-8 encoding.</p> |
| <b>Windows Stop Script</b>    | <p><b>Server:</b></p> <ul style="list-style-type: none"> <li>● Essbase Server – <code>EPM_ORACLE_INSTANCE/bin/stopEssbase.bat</code> (redirects to OPMN)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| <b>UNIX Stop Script</b>       | <p><b>Server:</b></p> <ul style="list-style-type: none"> <li>● Essbase Server – <code>EPM_ORACLE_INSTANCE/bin/stopEssbase.sh</code> (redirects to OPMN)</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

Stopping Essbase Server can take some time, depending on how many Essbase applications are running on the server. To stop Essbase Server, you need Administrator permissions.

See the *Oracle Essbase Database Administrator's Guide* for more information about shutting down Essbase Server.

For more information about stopping Essbase Server, see the *Oracle Essbase Database Administrator's Guide* and the *Oracle Essbase Technical Reference*.

## Administration Services Server

The following table describes the services and processes for the Administration Services server.

**Table 73 Administration Services Application Server Service/Process**

| Information Type                                      | Details                                                                                                                                         |
|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Essbase, then Essbase Administration Services, and then Start Administration Services |
| <b>Registered Service Name</b>                        | Hys9eas                                                                                                                                         |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Administration Services - Web Application                                                                                              |
| <b>Description</b>                                    | HyS9eas - Controls the running of an Applications Server                                                                                        |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startEssbaseAdminServices.bat</i>                                                                                    |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startEssbaseAdminServices.sh</i>                                                                                     |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopEssbaseAdminServices.bat</i>                                                                                     |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/startEssbaseAdminServices.sh</i>                                                                                     |

## Integration Services Server

The following table describes the services and processes for the Integration Services server.

**Table 74 Integration Services Server Service/Process**

| Information Type                                      | Details                                                                                                                                                |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Essbase, then Integration Services, and then Server <sup>1</sup>                             |
| <b>Registered Service Name</b>                        | Hyperion Integration Services                                                                                                                          |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Integration Services                                                                                                                          |
| <b>Description</b>                                    | N/A                                                                                                                                                    |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startEisServer.bat</i>                                                                                                      |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startEisServer.sh</i>                                                                                                       |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopEisServer.bat</i><br>Note that you must manually stop the Integration Services service manually using the Task Manager. |



| Information Type        | Details                                                                                                                                             |
|-------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>UNIX Stop Script</b> | <code>EPM_ORACLE_INSTANCE/bin/stopEisServer.sh</code><br>Note that you must manually stop the Integration Services service by stopping the process. |

<sup>1</sup>For more information on starting and stopping Integration Services Server from the command line, on other startup switches for the `olapisvr` command, and on using the `ais.cfg` file, see the *Essbase Integration Services System Administrator's Guide*.

## Essbase Studio Server

The following table describes the services and processes for the Essbase Studio server.

**Table 75** Essbase Studio Server

| Information Type                                      | Details                                                                                                       |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Essbase, then Essbase Studio, and then Start Server |
| <b>Registered Service Name</b>                        | Hyperion Studio Service BPMS bpms1                                                                            |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Studio Service BPMS bpms1                                                                            |
| <b>Description</b>                                    | NA                                                                                                            |
| <b>Windows Startup Script</b>                         | <code>EPM_ORACLE_INSTANCE/bin/startBPMS_bpms1_Server.bat</code>                                               |
| <b>UNIX Startup Script</b>                            | <code>EPM_ORACLE_INSTANCE/bin/startBPMS_bpms1_Server.sh</code>                                                |
| <b>Windows Stop Script</b>                            | <code>EPM_ORACLE_INSTANCE/bin/stopBPMS_bpms1_Server.bat</code>                                                |
| <b>UNIX Stop Script</b>                               | <code>EPM_ORACLE_INSTANCE/bin/stopBPMS_bpms1_Server.sh</code>                                                 |

By default, Essbase Studio Server runs in the background on UNIX. This behavior is controlled by a combination of an Essbase Studio Server property (`server.runInBackground`), EPM System environment variables, and `startServer.sh`.

► To start Essbase Studio Server in the foreground on UNIX:

1. In the Essbase Studio `server.properties` file, set the `server.runInBackground` property to “false” or comment it out.

The `server.properties` file is located in `EPM_ORACLE_INSTANCE/user_projects/epmsystem1/BPMS/bpms/bin/server.properties`. See *Oracle Essbase Studio User's Guide* for information on this property.

2. Set these variables in the environment where you plan to run `startServer.sh`:

```
EPM_ORACLE_INSTANCE=/installationPath/Oracle/Middleware/user_projects/epmsystem1
```

```
EPM_ORACLE_HOME=/installationPath/Oracle/Middleware/EPMSystem11R1
```

```
JAVA_HOME="${EPM_ORACLE_HOME}/../jdk160_21/jre"
```

```
JAVA_OPTIONS="-DESSBASE_STUDIO_INSTANCE=${EPM_ORACLE_INSTANCE}/BPMS/bpms1
-DsuppressAPSPProductInfo=true"
```

3. Edit the Essbase Studio `startServer.sh` shell as follows:

`startServer.sh` is located in `EPM_ORACLE_HOME/products/Essbase/EssbaseStudio/Server/startServer.sh`.

- Locate the last line of the file:

```
nohup "${JAVA_HOME}/bin/java" -Xms128m -Xmx768m $JAVA_OPTIONS -jar
"${EPM_ORACLE_HOME}/products/Essbase/EssbaseStudio/Server/server.jar" >/dev/
null &
```

- Remove `nohup` from the beginning of the line, the `STDOUT` to null direction (`>/dev/null`), and the background processing command (`&`) from the line; for example:

```
"${JAVA_HOME}/bin/java" -Xms128m -Xmx768m $JAVA_OPTIONS -jar "${EPM_ORACLE_HOME}/
products/Essbase/EssbaseStudio/Server/server.jar"
```

4. Start Essbase Studio Server by running the following statement: `./startServer.sh`.

## Provider Services Application Server

The following table describes the services and processes for the Provider Services application server.

**Table 76** Provider Services Application Server Services and Processes

| Information Type                                      | Details                                                                                                                              |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Essbase, then Provider Services, and then Start Analytic Provider Services |
| <b>Registered Service Name</b>                        | HyS9aps                                                                                                                              |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Provider Services - Web Application                                                                                         |
| <b>Description</b>                                    | Provide access service to Hyperion Provider Services                                                                                 |
| <b>Windows Startup Script</b>                         | <code>EPM_ORACLE_INSTANCE/bin/startAnalyticProviderServices.bat</code>                                                               |
| <b>UNIX Startup Script</b>                            | <code>EPM_ORACLE_INSTANCE/bin/startAnalyticProviderServices.sh</code>                                                                |
| <b>Windows Stop Script</b>                            | <code>EPM_ORACLE_INSTANCE/bin/stopAnalyticProviderServices.bat</code>                                                                |
| <b>UNIX Stop Script</b>                               | <code>EPM_ORACLE_INSTANCE/bin/stopAnalyticProviderServices.sh</code>                                                                 |

## Financial Reporting Services

The following table describes the services and processes for Financial Reporting.

This service is optional and is only created when you install the Print Server after installing Financial Reporting Studio. See [“Installing Financial Reporting Studio and Financial Reporting Print Server”](#) on page 111.

**Table 77** Financial Reporting Services and Processes

| Information Type                               | Details                                                                |
|------------------------------------------------|------------------------------------------------------------------------|
| Windows Start Menu Command                     | N/A                                                                    |
| Registered Service Name                        | HyS9FRPrint                                                            |
| Display Name in Windows Services Control Panel | Hyperion Financial Reporting - Print Service                           |
| Description                                    | Generates PDF, batch, and scheduled job output for Financial Reporting |
| Windows Startup Script                         | N/A                                                                    |
| UNIX Startup Script                            | N/A                                                                    |
| Windows Stop Script                            | N/A                                                                    |
| UNIX Stop Script                               | N/A                                                                    |

## Financial Reporting Application Server

The following table describes the services and processes for the Financial Reporting application server.

**Table 78** Financial Reporting Application Server Services and Processes

| Information Type                               | Details                                                                                                                                     |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Windows Start Menu Command                     | Select Start, then Programs, then Oracle EPM System, then Reporting and Analysis, and then Start Reporting and Analysis Financial Reporting |
| Registered Service Name                        | HyS9FRReports                                                                                                                               |
| Display Name in Windows Services Control Panel | Hyperion Financial Reporting - Web Application                                                                                              |
| Description                                    | Provide access service to Hyperion Financial Reporting Web Server                                                                           |
| Windows Startup Script                         | <i>EPM_ORACLE_INSTANCE/bin/startFinancialReporting.bat</i>                                                                                  |
| UNIX Startup Script                            | <i>EPM_ORACLE_INSTANCE/bin/startFinancialReporting.sh</i>                                                                                   |
| Windows Stop Script                            | <i>EPM_ORACLE_INSTANCE/bin/stopFinancialReporting.bat</i>                                                                                   |
| UNIX Stop Script                               | <i>EPM_ORACLE_INSTANCE/bin/stopFinancialReporting.sh</i>                                                                                    |

## Web Analysis Application Server

The following table describes the services and processes for the Web Analysis application server.

**Table 79** Web Analysis Application Server Services and Processes

| Information Type                       | Details                                                                                                                              |
|----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>      | Select Start, then Programs, then Oracle EPM System, then Reporting and Analysis, and then Start Reporting and Analysis Web Analysis |
| <b>Registered Service Name</b>         | HyS9WebAnalysis                                                                                                                      |
| <b>Display Name in Windows Control</b> | Hyperion Web Analysis - Web Application                                                                                              |
| <b>Description</b>                     | Provide access service to Hyperion Web Analysis - Web Application                                                                    |
| <b>Windows Startup Script</b>          | <i>EPM_ORACLE_INSTANCE/bin/startWebAnalysis.bat</i>                                                                                  |
| <b>UNIX Startup Script</b>             | <i>EPM_ORACLE_INSTANCE/bin/startWebAnalysis.sh</i>                                                                                   |
| <b>Windows Stop Script</b>             | <i>EPM_ORACLE_INSTANCE/bin/stopWebAnalysis.bat</i>                                                                                   |
| <b>UNIX Stop Script</b>                | <i>EPM_ORACLE_INSTANCE/bin/stopWebAnalysis.sh</i>                                                                                    |

## Calculation Manager Application Server

The following table describes the services and processes for Calculation Manager.

**Table 80** Calculation Manager Services and Processes

| Information Type                                      | Details                                                                                                    |
|-------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Calculation Manager, and then Start Calc Manager |
| <b>Registered Service Name</b>                        | HyS9CALC                                                                                                   |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion CALC Manager - Web Application                                                                    |
| <b>Description</b>                                    | Provide access service to CALC Manager Web Server                                                          |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startCalcMgr.bat</i>                                                            |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startCalcMgr.sh</i>                                                             |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopCalcMgr.bat</i>                                                             |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopCalcMgr.sh</i>                                                              |

## Planning Application Server

The following table describes the services and processes for the Planning application server.

**Table 81** Planning Application Server Services and Processes

| Information Type                                      | Details                                                                                     |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Planning, and then Start Planning |
| <b>Registered Service Name</b>                        | HyS9Planning                                                                                |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Planning - Web Application                                                         |
| <b>Description</b>                                    | Provides access service to Planning Web server                                              |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startPlanning.bat</i>                                            |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startPlanning.sh</i>                                             |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopPlanning.bat</i>                                             |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopPlanning.sh</i>                                              |

In addition, Planning uses the Hyperion RMI Registry.

**Table 82** Hyperion RMI Registry Application Server Services and Processes

| Information Type                                      | Details                                                       |
|-------------------------------------------------------|---------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | N/A                                                           |
| <b>Registered Service Name</b>                        | Hyperion RMI Registry                                         |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion RMI Registry                                         |
| <b>Description</b>                                    | N/A                                                           |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/startRMI.bat</i>                       |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_HOME/common/RMI/11.1.2.0/HyperionRMIService</i> |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/stopRMI.bat</i>                        |
| <b>UNIX Stop Script</b>                               | N/A                                                           |

## Financial Management Services

The following table describes the services and processes for Financial Management.

**Table 83** Financial Management Services and Processes

| Information Type                  | Details                                                                                                       |
|-----------------------------------|---------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b> | Select Start, then Programs, then Oracle EPM System, then Financial Management, and then Financial Management |

| Information Type                                      | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Registered Service Name</b>                        | <ul style="list-style-type: none"> <li>● Hyperion S9 Financial Management Service</li> <li>● Hyperion S9 Financial Management DME Listener</li> <li>● HFMWebServiceManager</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                           |
| <b>Display Name in Windows Services Control Panel</b> | <ul style="list-style-type: none"> <li>● Hyperion Financial Management – Management Service</li> <li>● Hyperion Financial Management – DME Listener</li> <li>● Hyperion Financial Management – Web Service Manager</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                   |
| <b>Description</b>                                    | <ul style="list-style-type: none"> <li>● Hyperion Financial Management Service: Service which perpetuates application instances for optimal login performance</li> <li>● Hyperion Financial Management DME Listener: Hyperion Financial Management IP Listener for communication with the Hyperion Data Movement Engine. If this service is stopped, the DME Web service will not be able to communicate with all HFM instances on this server.</li> <li>● Hyperion Financial Management Web Service Manager: Manages the session information for connection in the Financial Management web server.</li> </ul> |
| <b>Windows Startup Script</b>                         | <ul style="list-style-type: none"> <li>● <i>EPM_ORACLE_INSTANCE/bin/startHFMMangementService.bat</i></li> <li>● <i>EPM_ORACLE_INSTANCE/bin/startHFMDMEListener.bat</i></li> <li>● <i>EPM_ORACLE_INSTANCE/bin/startHFMWebServiceManager.bat</i></li> </ul>                                                                                                                                                                                                                                                                                                                                                       |
| <b>UNIX Startup Script</b>                            | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| <b>Windows Stop Script</b>                            | <ul style="list-style-type: none"> <li>● <i>EPM_ORACLE_INSTANCE/bin/stopHFMMangementService.bat</i></li> <li>● <i>EPM_ORACLE_INSTANCE/bin/stopHFMDMEListener.bat</i></li> <li>● <i>EPM_ORACLE_INSTANCE/bin/stopHFMWebServiceManager.bat</i></li> </ul>                                                                                                                                                                                                                                                                                                                                                          |
| <b>UNIX Stop Script</b>                               | NA                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |

**Note:** The synchronization between Financial Management application servers is based on system time. Changing the clock can affect this synchronization. For the time change to and from Daylight Savings Time, Oracle recommends that you stop the servers before the time change and restart them afterward.

## Financial Management Application Server

The following table describes the services and processes for the Financial Management Web application server.

**Table 84** Financial Management Web Application Services and Processes

| Information Type                  | Details                                                                                                                          |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b> | Select Start, then Programs, then Oracle EPM System, then Financial Management, and then Start Financial Management Web Services |

| Information Type                                      | Details                                               |
|-------------------------------------------------------|-------------------------------------------------------|
| <b>Registered Service Name</b>                        | HyS9FinancialManagementWebSvcs                        |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Financial Management - Web Services          |
| <b>Description</b>                                    | Provide web services support to Financial Management  |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startFMWebServices.bat</i> |
| <b>UNIX Startup Script</b>                            | NA                                                    |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopFMWebServices.bat</i>  |
| <b>UNIX Stop Script</b>                               | NA                                                    |

In addition, Financial Management has a Web tier component that runs in IIS.

## Strategic Finance

The following table describes the services and processes for Strategic Finance.

**Table 85** Strategic Finance Services and Processes

| Information Type                                      | Details                                                                                                                                                                                 |
|-------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Strategic Finance, then Server, and then Start Strategic Finance Service                                                      |
| <b>Registered Service Name</b>                        | HyHSFSrv                                                                                                                                                                                |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Strategic Finance Service                                                                                                                                                      |
| <b>Description</b>                                    | Provides Oracle Hyperion Strategic Finance, Fusion Edition services including entity repository management, authentication, access control, consolidation, data and metadata management |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_HOME/products/hsf/scripts/StartHSFService.bat</i>                                                                                                                         |
| <b>UNIX Startup Script</b>                            | NA                                                                                                                                                                                      |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_HOME/products/hsf/scripts/StopHSFService.bat</i>                                                                                                                          |
| <b>UNIX Stop Script</b>                               | NA                                                                                                                                                                                      |

In addition, Strategic Finance has a Web tier component that runs in IIS.

## Performance Scorecard Application Server

The following table describes the services and processes for the Performance Scorecard application server.

**Note:** If you are using Essbase as a data source for Performance Scorecard, you must start Essbase first.

**Table 86** Performance Scorecard Application Server Services and Processes

| Information Type                                      | Details                                                                                         |
|-------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Scorecard, and then Start Web Reports |
| <b>Registered Service Name</b>                        | HyS9HPSWebReports                                                                               |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Performance Scorecard Web Reports - Web Application                                    |
| <b>Description</b>                                    | Hyperion Performance Scorecard WebReports - Web Application                                     |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startHpsWebReports.bat</i>                                           |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startHpsWebReports.sh</i>                                            |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopHpsWebReports.bat</i>                                            |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopHpsWebReports.sh</i>                                             |

## Performance Scorecard Alerter Application Server

The following table describes the services and processes for the Performance Scorecard Alerter application server.

**Table 87** Performance Scorecard Alerter Application Server Services and Processes

| Information Type                                      | Details                                                                                     |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Scorecard, and then Start Alerter |
| <b>Registered Service Name</b>                        | HyS9HPSAlerter                                                                              |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Performance Scorecard Alerter - Web Application                                    |
| <b>Description</b>                                    | Hyperion Performance Scorecard Alerter - Web Application                                    |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startHpsAlerter.bat</i>                                          |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startHpsAlerter.sh</i>                                           |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopHpsAlerter.bat</i>                                           |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopHpsAlerter.sh</i>                                            |

## Profitability and Cost Management Application Server

The following table describes the services and processes for Profitability and Cost Management.



**Table 88** Profitability and Cost Management Services and Processes

| Information Type                                      | Details                                                                                               |
|-------------------------------------------------------|-------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Profitability, and then Start Profitability |
| <b>Registered Service Name</b>                        | HyS9HyS9PftWeb                                                                                        |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Profitability - Web Application                                                              |
| <b>Description</b>                                    | Provides a Workspace module for Profitability.                                                        |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startProfitability.bat</i>                                                 |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startProfitability.sh</i>                                                  |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopProfitability.bat</i>                                                  |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopProfitability.sh</i>                                                   |

## Disclosure Management Application Server

The following table describes the services and processes for Disclosure Management.

**Table 89** Disclosure Management Services and Processes

| Information Type                                      | Details                                                                                                               |
|-------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Disclosure Management, and then Start Disclosure Management |
| <b>Registered Service Name</b>                        | HyS9Disclosure                                                                                                        |
| <b>Display Name in Windows Services Control Panel</b> | Oracle Hyperion Disclosure Management - Web Application                                                               |
| <b>Description</b>                                    | Provide access service to Disclosure Management                                                                       |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startDisclosureManagement.bat</i>                                                          |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startDisclosureManagement.sh</i>                                                           |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopDisclosureManagement.bat</i>                                                           |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopDisclosureManagement.sh</i>                                                            |

## Financial Close Management Application Server

The following table describes the services and processes for Financial Close Management.

**Note:** Ensure that you complete the post-configuration tasks before you start Financial Close Management. See [“Financial Close Management Postconfiguration Tasks” on page 272.](#)

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**Caution!** If you started the SOA Server to configure Financial Close Management, stop it before starting EPM System services.

---

**Note:** Before you start Financial Close Management, note the following server startup order:

- WebLogic Administration Server
- Hyperion Foundation Services Managed Server
- Oracle HTTP Server - Oracle Process Manager (*ohsInstanceInstanceNumber*)
- In any order:
  - Financial Close Management Web application
  - Financial Management Web Services Managed Server, if you’re using Financial Management with Financial Close Management.
  - FDM Web application, if you’re using FDM with Financial Close Management.
  - Financial Reporting Web application, if you’re using Financial Reporting with Financial Close Management.
- Oracle SOA managed server

**Table 90** Financial Close Management Services and Processes

| Information Type                                      | Details                                                                                                  |
|-------------------------------------------------------|----------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Financial Close, and then Start FinancialClose |
| <b>Registered Service Name</b>                        | HyS9FinancialClose                                                                                       |
| <b>Display Name in Windows Services Control Panel</b> | Oracle Financial Close Management - Web Application                                                      |
| <b>Description</b>                                    | Provide access service to Financial Close Manager Web Application                                        |
| <b>Windows Startup Script</b>                         | <i>EPM_ORACLE_INSTANCE/bin/startFinancialClose.bat</i>                                                   |
| <b>UNIX Startup Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/startFinancialClose.sh</i>                                                    |
| <b>Windows Stop Script</b>                            | <i>EPM_ORACLE_INSTANCE/bin/stopFinancialClose.bat</i>                                                    |
| <b>UNIX Stop Script</b>                               | <i>EPM_ORACLE_INSTANCE/bin/stopFinancialClose.sh</i>                                                     |

## Data Relationship Management

The following table describes the services and processes for Data Relationship Management.

**Table 91** Data Relationship Management Services and Processes

| Information Type                                      | Details                                                                                                                                                                                                                                                                                                                                                         |
|-------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Data Relationship Management, and then Configuration Console<br><br>From the Start menu, select Programs, then Oracle EPM System, then Data Relationship Management, then Configuration Console or <code>EPM_ORACLE_HOME/products/DataRelationshipManagement/server/bin/drm-server-console.exe</code> |
| <b>Registered Service Name</b>                        | Oracle DRM Server Processes                                                                                                                                                                                                                                                                                                                                     |
| <b>Display Name in Windows Services Control Panel</b> | Oracle DRM Server Processes                                                                                                                                                                                                                                                                                                                                     |
| <b>Description</b>                                    | Handles starting and stopping of required server applications in the Oracle DRM environment                                                                                                                                                                                                                                                                     |
| <b>Windows Startup Command</b>                        | Net start "Oracle DRM Server Processes"                                                                                                                                                                                                                                                                                                                         |
| <b>UNIX Startup Script</b>                            | NA                                                                                                                                                                                                                                                                                                                                                              |
| <b>Windows Stop Command</b>                           | Net stop "Oracle DRM Server Processes"                                                                                                                                                                                                                                                                                                                          |
| <b>UNIX Stop Script:</b>                              | NA                                                                                                                                                                                                                                                                                                                                                              |

In addition, Data Relationship Management has a Web tier component that runs in IIS.

## FDM

The following table describes the services and processes for FDM.

**Table 92** FDM Task Manager Services and Processes

| Information Type                                      | Details                                                                                                                               |
|-------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| <b>Windows Start Menu Command</b>                     | Select Start, then Programs, then Oracle EPM System, then Financial Data Quality Management, then Task Manager, and then Task Manager |
| <b>Registered Service Name</b>                        | HyS9FDMTaskManagerSrv                                                                                                                 |
| <b>Display Name in Windows Services Control Panel</b> | Hyperion Financial Data Quality Management - Task Manager                                                                             |
| <b>Description</b>                                    | Provides the ability to schedule Hyperion Financial Data Quality Management tasks                                                     |
| <b>Windows Startup Script</b>                         | <code>EPM_ORACLE_INSTANCE/bin/startFDMTaskManager.bat</code>                                                                          |
| <b>UNIX Startup Script</b>                            | NA                                                                                                                                    |
| <b>Windows Stop Script</b>                            | <code>EPM_ORACLE_INSTANCE/bin/stopFDMTaskManager.bat</code>                                                                           |
| <b>UNIX Stop Script</b>                               | NA                                                                                                                                    |

In addition, FDM has a Web tier component that runs in IIS.

## ERP Integrator Application Server

The following table describes the services and processes for ERP Integrator.

**Table 93** ERP Integrator Services and Processes

| Information Type                               | Details                                                                                                 |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------|
| Windows Start Menu Command                     | Select Start, then Programs, then Oracle EPM System, then ERP Integrator, and then Start ERP Integrator |
| Registered Service Name                        | HyS9aifWeb                                                                                              |
| Display Name in Windows Services Control Panel | Hyperion ERP Integrator - Web Application                                                               |
| Description                                    | Provides a Workspace module for ERPI                                                                    |
| Windows Startup Script                         | <i>EPM_ORACLE_INSTANCE/bin/startERPIntegrator.bat</i>                                                   |
| UNIX Startup Script                            | <i>EPM_ORACLE_INSTANCE/bin/startERPIntegrator.sh</i>                                                    |
| Windows Stop Script                            | <i>EPM_ORACLE_INSTANCE/bin/stopERPIntegrator.bat</i>                                                    |
| UNIX Stop Script                               | <i>EPM_ORACLE_INSTANCE/bin/stopERPIntegrator.sh</i>                                                     |

## Launching Clients

This section describes how to launch EPM System clients. It lists default URLs and script names as appropriate. Most clients can also be started using the Windows Start menu.

The following table describes the URLs and scripts for launching EPM System clients.

**Table 94** Launching Clients

| Client                                  | URL                                     | Script or Other Launch Method                                                                                                                                                                                                         |
|-----------------------------------------|-----------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Oracle Hyperion Shared Services Console | <i>http://WebServer:Port/interop/</i>   | From the Start menu, select Programs, then Oracle EPM System, then Foundation Services, and then Shared Services URL.<br><br><b>Note:</b> The Start menu item is available only on the machine on which you installed the Web server. |
| EPM Workspace                           | <i>http://WebServer:Port/workspace/</i> | From the Start menu, select Programs, then Oracle EPM System, then Workspace, and then Workspace URL.<br><br><b>Note:</b> The Start menu item is available only on the machine on which you installed the Web server.                 |
| Smart View                              | NA                                      | Use the Smart View menu or Smart View ribbon in Microsoft Excel, Microsoft Word, or Microsoft PowerPoint.                                                                                                                             |

| Client                                                  | URL                                                                                                                                                                                                                         | Script or Other Launch Method                                                                                                                                                                                                          |
|---------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Administration Services Console                         | <code>http://WebServer:port/easconsole/console.html</code>                                                                                                                                                                  | From the Start menu, select Programs, then Oracle EPM System, then Essbase, then Essbase Administration Services, and then Start Administration Services Console.                                                                      |
| Oracle Essbase Integration Services Console             | NA                                                                                                                                                                                                                          | From the Start menu, select Programs, then Oracle EPM System, then Essbase, then Integration Services, and then Console.<br><br>Or<br><br><code>EPM_ORACLE_HOME/products/Essbase/eis/console/bin/startOlapbldr.bat</code>              |
| Essbase Studio Console                                  | NA                                                                                                                                                                                                                          | From the Start menu, select Programs, then Oracle EPM System, then Essbase, then Essbase Studio, and then Essbase Studio Console.<br><br>Or<br><br><code>EPM_ORACLE_HOME/products/Essbase/EssbaseStudio/Console/startStudio.bat</code> |
| Oracle Essbase Spreadsheet Add-in                       |                                                                                                                                                                                                                             | From the Excel menu bar, select Essbase to display the Essbase menu.                                                                                                                                                                   |
| Financial Reporting Studio                              |                                                                                                                                                                                                                             | From the Start menu, select Programs, then Oracle EPM System, then Financial Reporting Studio, and then Financial Reporting Studio.<br><br>Or<br><br><code>%ProgramFiles%/Oracle/FinancialReportingStudio/HReports.exe</code>          |
| Oracle Hyperion Web Analysis Studio                     | The Sun Java plug-in is installed when Web Analysis Studio is first used. To start Web Analysis Studio, in your Web browser's Address bar, enter the Web Analysis Studio URL <code>http://WebServer:Port/WebAnalysis</code> |                                                                                                                                                                                                                                        |
| Oracle Hyperion Interactive Reporting Studio            |                                                                                                                                                                                                                             | From the Start menu, select Programs, then Oracle EPM System, then Reporting and Analysis, and then Interactive Reporting, and then Studio.<br><br>Or<br><br><code>EPM_ORACLE_HOME/products/biplus/bin/brioqry.exe</code>              |
| Financial Management Client                             |                                                                                                                                                                                                                             | <code>EPM_ORACLE_HOME/products/FinancialManagement/Client/HFM.exe</code>                                                                                                                                                               |
| Strategic Finance Client                                | NA                                                                                                                                                                                                                          | <code>EPM_ORACLE_HOME/products/hsf/bin/HSF.exe</code>                                                                                                                                                                                  |
| Oracle Hyperion Strategic Finance Server Administration |                                                                                                                                                                                                                             | From the Start menu, select Programs, then Oracle EPM System, then Strategic Finance, then Server, and then Server Administration<br><code>EPM_ORACLE_HOME/products/hsf/bin/HSFAdmin.exe</code>                                        |

| Client                                         | URL                                                          | Script or Other Launch Method                                                                                                                     |
|------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Data Relationship Management Web Client        | <code>http://drm_web_server_name/drm-web-client</code>       | From the Start menu, select Programs, then Oracle EPM System, then Data Relationship Management, then Web Client                                  |
| Data Relationship Management Migration Utility | <code>http://drm_web_server_name/drm-migration-client</code> | From the Start menu, select Programs, then Oracle EPM System, then Data Relationship Management, then Migration Utility                           |
| Data Relationship Management Batch Client      | NA                                                           | From a Windows command line prompt, run <code>EPM_ORACLE_HOME/products/DataRelationshipManagement/client/batch-client/drm-batch-client.exe</code> |
| FDM Web client                                 | <code>http://WebServerName/HyperionFDM</code>                | NA                                                                                                                                                |
| FDM Workbench Client                           |                                                              | From the Start menu, select Programs, then Oracle EPM System, then Financial Data Quality Management, then Workbench, and then Workbench Client   |

# 9

## Validating the Installation and Verifying Deployment

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## Validating the Installation

EPM System Diagnostics tests the connectivity of installed and configured EPM System components. Run EPM System Diagnostics on each machine in the deployment. The results of the tests are saved in HTML format.

## Prerequisites

Before using EPM System Diagnostics, complete these prerequisites:

- Install EPM System products. See [Chapter 3, “Installing EPM System Products.”](#)
- Use EPM System Configurator to perform all configuration tasks required for each product. See [Chapter 4, “Configuring EPM System Products.”](#)
- Perform postconfiguration tasks.  
See [Chapter 7, “Performing Postconfiguration Tasks.”](#)
- Start EPM System services.  
See [Chapter 8, “Starting and Stopping EPM System Products.”](#)

## Using EPM System Diagnostics

► To run EPM System Diagnostics:

### 1 Choose a method:

- (Windows) In `EPM_ORACLE_INSTANCE/bin`, double-click `validate.bat`.
- From the Start Menu, choose **Programs**, then **Oracle EPM System**, then **Foundation Services**, then *instanceName*, and then **EPM System Diagnostics**.
- (UNIX) From a console, change to `EPM_ORACLE_INSTANCE/bin`, and then enter `validate.sh`.

Progress is shown in the command window.

**2 To view results, navigate to `EPM_ORACLE_INSTANCE/diagnostics/reports` and open `validation_report_date_time.html`.**

**3 Look for failed tests, and diagnose and fix problems.**

EPM System Diagnostics creates a ZIP file of all the logs in `EPM_ORACLE_INSTANCE/` `logsziips` for your convenience.

For more information about logs, see *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

**4 Run EPM System Diagnostics again and view the report to verify that problems are solved.**

**Note:** Clicking Refresh in the browser does not refresh the report output.

**5 In a distributed environment, run EPM System Diagnostics on each machine in the deployment.**

The report captures the following information:

- Test date and time
- Test Status: Passed or Failed for each test
- Service: Type of test for each test
- Test Description: A detailed description of each test
- Duration: Duration of each test
- Test start time
- Test end time
- Total test duration

## Diagnostics Performed

The following list highlights the EPM System Diagnostics tests performed for EPM System products.

- CFG: Configuration - Checks whether all configuration tasks have been completed
- DB: Database - Checks connection to database `host:port;databaseName`
- EXT: External Authentication - Checks Native Directory external authentication provider configuration
- HTTP: http - Checks availability of HTTP context for all components configured for the Web server.
- SSO - Checks availability of login to Shared Services
- WEB: Web application - Checks availability of Web application on `host:port`
- Additional product-specific tests



# Verifying Deployment

## Subtopics

- [Verifying Shared Services Deployment](#)
- [Verifying EPM Workspace Deployment and Products in EPM Workspace](#)
- [Additional Verification for Financial Close Management](#)
- [Verifying Administration Services Deployment](#)
- [Verifying Provider Services Deployment](#)

## Verifying Shared Services Deployment

➤ To verify deployment:

- 1 From the Start menu, select **Programs**, then **Oracle EPM System**, then **Foundation Services**, and then **Shared Services URL**. Or, using a Web browser, open:

`http://Hostname.Example.Com:WebServerListenPort/interop/`

- 2 Log on to Shared Services.
- 3 Review the output for the WebLogic managed server in `MIDDLEWARE_HOME/user_projects/domains/EPMSystem/servers/SERVER_NAME/logs`.
- 4 Review the product logs in `EPM_ORACLE_INSTANCE/diagnostics/logs`. You can also review the diagnostics reports in `EPM_ORACLE_INSTANCE/diagnostics/reports`.

## Verifying EPM Workspace Deployment and Products in EPM Workspace

➤ To verify deployment:

- 1 From the Start menu, select **Programs**, then **Oracle EPM System**, then **Workspace**, and then **Workspace URL**. Or, using a Web browser, open

`http://Hostname.Example.Com:WebServerListenPort/workspace/`

- 2 Review the output for your WebLogic managed server in `MIDDLEWARE_HOME/user_projects/domains/EPMSystem/servers/SERVER_NAME/logs`.
- 3 Review the product logs in `EPM_ORACLE_INSTANCE/diagnostics/logs`. You can also review the diagnostics reports in `EPM_ORACLE_INSTANCE/diagnostics/reports`.
- 4 From the EPM Workspace Help menu, select **About** and in the **Details** section verify the list of installed products.
- 5 Launch each listed product from EPM Workspace. The following products can be launched from EPM Workspace:
  - Oracle Hyperion Reporting and Analysis Framework
  - Financial Reporting

- Production Reporting
- Oracle Hyperion Web Analysis
- Planning
- Financial Management
- Oracle Hyperion Performance Scorecard
- Profitability and Cost Management

Before you can access Oracle Hyperion Profitability and Cost Management in EPM Workspace and verify deployment, you must perform some initial tasks. See the *Oracle Hyperion Profitability and Cost Management Administrator's Guide*.

- Performance Management Architect
- Oracle Hyperion Calculation Manager
- ERP Integrator
- Financial Close Management. To perform additional verification for Financial Close Management, see [“Additional Verification for Financial Close Management” on page 314](#).

## Additional Verification for Financial Close Management

► To verify that the Oracle SOA Server and Financial Close Management are communicating:

- 1 After you launch Financial Close Management, create a schedule with a range that includes today's date.
- 2 Create a task using the **Basic Task Type** on today's date, but set the start time to be earlier than the current time.
- 3 Go to **Manage Schedules**, highlight the schedule, run **Set Status**, and then change status to **Open**.
- 4 Click **Open** and open the schedule in the **Task List** view.

The task should go from a pending to a running state (green triangle), because the task is past its scheduled start time.

## Verifying Administration Services Deployment

► To verify deployment:

- 1 Using a Web browser, open:  
`WebServer:port/easconsole/console.html`
- 2 Log on to Oracle Essbase Administration Services using the Java Web Start console.
- 3 Review the output for your WebLogic managed server in `MIDDLEWARE_HOME/user_projects/domains/EPMSysstem/servers/SERVER_NAME/logs`.

- 4 Review the product logs in *EPM\_ORACLE\_INSTANCE*/diagnostics/logs. You can also review the diagnostics reports in *EPM\_ORACLE\_INSTANCE*/diagnostics/reports.

## Verifying Provider Services Deployment

➤ To verify deployment:

- 1 Using a Web browser, open:

`http://Hostname.Example.Com:WebServerListenPort/aps/APS`

- 2 Review the output for your WebLogic managed server in *MIDDLEWARE\_HOME*/user\_projects/domains/EPMSys~~tem~~/servers/*SERVER\_NAME*/logs.
- 3 Review the product logs in *EPM\_ORACLE\_INSTANCE*/diagnostics/logs. You can also review the diagnostics reports in *EPM\_ORACLE\_INSTANCE*/diagnostics/reports.



# 10

## Reconfiguring EPM System Products

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EPM System Configurator enables you to reconfigure products to incorporate changes in your environment.

To reconfigure, launch EPM System Configurator on the computer hosting the product, and follow the procedures in [Chapter 4, “Configuring EPM System Products.”](#)

Note the following information about reconfiguring:

- If you are reconfiguring the application server for Foundation Services, you must also reconfigure the relational database.
- If you reconfigure a database, restart the Web application server afterward.
- If you reconfigure to change a port or server, you must also reconfigure the Web server (under the Foundation Services tasks in EPM System Configurator).

### Reconfiguring for SSL

If you want to change from an SSL-enabled environment to a non-SSL enabled environment, or vice versa, you must use EPM System Configurator to reconfigure all EPM System products, selecting the following configuration tasks:

- Configure Common Settings — Change the “Use SSL for communication between web applications” option if required for your SSL implementation.
- Configure Logical Address for Web Applications — Change the attributes for logical Web applications without having to redeploy.
- Configure Web server — Reconfigure the Web server

# Changing Repository Passwords and Database Connection Information

For EPM System products that require a database repository, you can change database connection information or passwords after product deployments.

After changing database connection information, restart EPM System products as described in [Chapter 8, “Starting and Stopping EPM System Products.”](#)

## Changing the Shared Services and Registry Database Connection Information and Password

Changing the Shared Services password also changes the EPM Workspace password.

If you are working in a distributed environment, repeat this procedure on each machine in the deployment.

➤ To update the connection information for the Shared Services Registry database (changing the password or the server):

- 1 Make a backup copy of the Shared Services Registry database.
- 2 If you are changing the password, using the database administration console, change the password of the user account that was used to configure the Shared Services database.
- 3 Stop EPM System Web applications and services and processes, and stop the original Shared Services Registry database.
- 4 On the machine hosting Shared Services, start EPM System Configurator.
- 5 On the “Configure a New or Existing EPM Oracle Instance” page, select **Modify an existing EPM Oracle instance**.
- 6 On the “Shared Services and Registry Database Configuration” page, select **Connect to a previously configured Shared Services database**, and then enter the new password or database connection information.

You cannot change the database type.

- 7 Click **Next** to go to the Task Selection page, and then close EPM System Configurator.

The `reg.properties` file is now updated with the new database connection information.

- 8 On the machine hosting Shared Services, launch EPM System Configurator again with the `enableRegTask` option: Change to `EPM_ORACLE_HOME/common/config/version_number` and then launch `configtool.bat | .sh -enableRegTask`.
- 9 On the “Configure a New or Existing EPM Oracle Instance” page, select **Modify an existing EPM Oracle instance**.
- 10 On the Task Selection page, under the Foundation tasks, select **Configure Database**.
- 11 On the “Shared Services and Registry Database Configuration” page, select **Connect to a previously configured Shared Services database** and re-enter the new database connection information.

- 12 Continue through EPM System Configurator and return to the Task Selection page. On the Task Selection page, for any other products that are configured to use the Shared Services Registry database, select **Configure Database**.

For these products, on the “Database Configuration” page, select **Connect to a previously configured database** and re-enter the new database connection information

- 13 Continue the configuration, and click **Finish** when you are done.
- 14 Restart the Web applications and services and processes.
- 15 If you are working in a distributed environment, repeat steps [step 4](#) - [step 7](#) on each machine in the deployment, launching EPM System Configurator on each machine.

## Changing EPM System Product Repository Database Connection Information and Passwords

- To change the connection information for the repository for EPM System products other than Shared Services:
  - 1 If you are changing the password, using the database administration console, change the password of the user account that was used to configure the EPM System product database.
  - 2 Stop EPM System Web applications and services and processes.
  - 3 Start EPM System Configurator, and under the product you want to configure, select **Configure Database**.
  - 4 On the “Configure Database” page, select **Connect to a previously configured database**.
  - 5 If you are changing only the password, specify the existing database and user, and enter the new password for the user account that was used to configure the EPM System product database.

If the database has moved to another server, you can also change the database host and port.  
If needed, you can also change the database user.

You cannot change the database type.
  - 6 When you are prompted to choose whether to **Drop and recreate tables** or **Reuse the existing database**, select **Reuse the existing database**.
  - 7 Continue the configuration, and click **Finish** when you are done.
  - 8 Restart the Web application and services and processes.

**Note:** For ERP Integrator registered with Performance Management Architect, if you change the password for the ERP Integrator database schema, then do the same for the Oracle Hyperion Financial Data Quality Management ERP Integration Adapter for Oracle Applications data source.

## Changing the Planning Applications Repository Password

Use Edit Datasource in the Classic Planning Application wizard to change the Applications repository password. You can also use the “Update Data Sources” page in the Planning Upgrade Wizard. See *Oracle Hyperion Planning Administrator's Guide*.

## Changing the Performance Management Architect Interface Datasource Password

Perform the following procedure if you are using the Interface Data Source configuration with Performance Management Architect applications.

- To change the Performance Management Architect Interface Data Source password:
  - 1 In the database, change the password.
  - 2 Run EPM System Configurator.
  - 3 On the Task Selection page, in the Performance Management Architect area, select **Configure Interface DataSource**.
  - 4 Select **Edit an existing datasource link**, and then select the datasource link.
  - 5 On the database configuration details page, enter the new password. Clear **Create Interface Tables**, if it is selected.
  - 6 Continue the configuration, and click **Finish** when you are done.

## Changing the FDM Repository Password

- To change the FDM repository password using FDM Workbench:
  - 1 In the database, change the password.
  - 2 From FDM Workbench, choose **Add Application** and log in.
  - 3 Choose the application for which you want to change the repository and select **Modify**.
  - 4 Select the **Database** tab and replace the existing password with the new password.
  - 5 Click **OK**.
  - 6 Click **OK** on the **Application** screen.
  - 7 Ensure that you can log in to the application.
- To change the FDM repository password using FDM Web:
  - 1 In the database, change the password.
  - 2 From the FDM Web logon screen, choose **Add Application** and log in.
  - 3 Choose the application for which you want to change the repository password and select **Modify**.
  - 4 Click **OK**.



- 5 Click **Close**.
- 6 Ensure that you can log in to the application.

## Changing the Data Relationship Management Repository Password

➤ To change the Data Relationship Management repository password for an application:

- 1 Stop Data Relationship Management.
- 2 In the database, change the password.
- 3 Open the Data Relationship Management console.
- 4 Go to **Configuration**.
- 5 Select the appropriate application using the arrow controls.
- 6 In **Database Connection**, enter the new password.
- 7 To test the new password, click **Test Connection**.

You should see a message, “Connection Succeeded!”

- 8 Restart the application or the Oracle Hyperion Data Relationship Management service.

## Reconfiguring Ports

For information about ports, port numbers, and how to configure ports, see “Ports” in *Oracle Hyperion Enterprise Performance Management System Installation Start Here*.

If you reconfigure to change a port, you must also reconfigure the Web server (under the Foundation Services tasks in EPM System Configurator).



---

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You can uninstall this release of EPM System products using EPM System Uninstaller. You can also perform a silent uninstallation.

When you uninstall EPM System products, EPM System Uninstaller:

- Stops and removes installed services.
- Un-deploys installed Web applications.
- Removes desktop icons and start menu icons.
- Removes appropriate entries from the Windows registry.
- Removes appropriate entries from the Shared Services Registry.
- Removes appropriate entries (such as virtual directories) from IIS.
- Removes appropriate entries from the OUI inventory (Oracle installation files list used for patching purposes).

---

**Caution!** When you uninstall EPM System products, EPM System Uninstaller removes everything from the installation directory. Before you uninstall, be sure to back up any files you want to keep. For information about backing up files, see *Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide*.

---

## Uninstalling EPM System Products

➤ To uninstall EPM System products:

### 1 Choose a method:

- (Windows) In `EPM_ORACLE_HOME/uninstall`, double-click `uninstall.cmd`.
- (Windows) In the Windows Control Panel, select **Add or Remove Programs**, select **Oracle EPM System**, and click **Change/Remove**.
- (Windows) From a Windows console, change to `EPM_ORACLE_HOME/uninstall/`, and then enter `uninstall.cmd`.

- From the **Start** menu, select **Programs, then Oracle EPM System, then Foundation Services, and then Uninstall EPM System**.
- (UNIX) Change to the `EPM_ORACLE_HOME/uninstall` directory and enter `./uninstall.sh`.
- (UNIX) Change to the `EPM_ORACLE_HOME/uninstall` directory and enter `./uninstall.sh -console`.

**2** Exit other programs before you continue, and then click or select **Next**.

**3** Select the products to uninstall, and then click or select **Next**. All components of the selected products are uninstalled.

For example, if you uninstall any Essbase component, EPM System Uninstaller uninstalls all Essbase components.

All installed products are selected by default. Select “**Deselect All Products**” to clear the selections for all products, and then select only the products you want to uninstall.

If you uninstall any Reporting and Analysis component, all other Reporting and Analysis components are disabled.

**4** Specify whether you want to delete all the files and directories in the EPM Oracle home directory.

If you select this option, data and customized files are deleted.

**5** Confirm the products to uninstall, and then click or select **Next**.

EPM System Uninstaller displays progress incrementally as each assembly's uninstallation is complete.

**Note:** To cancel the uninstallation, click or select **Cancel**. When you select **Cancel**, EPM System Uninstaller stops the uninstallation of the current assembly and rolls that assembly back to an installed state. It does not undo uninstallations for assemblies that were already uninstalled.

EPM System Uninstaller indicates the success or failure of the uninstallation. If any part of the uninstallation failed, EPM System Uninstaller notes which assembly failed to uninstall. Check the log files for more information about the errors. You can find the log files in `EPM_ORACLE_HOME/diagnostics/logs/install`. There is a log file for each assembly, named `product-install.log`; for example, `hss-install.log`.

**6** Click or select **Finish** to close EPM System Uninstaller.

**7** On Windows, if you uninstalled Oracle HTTP Server, you must reboot to completely remove the installation. This step is required if you plan to reinstall.

On Windows 2008, you must reboot after uninstalling EPM System products.

## Performing a Silent Uninstallation

Silent uninstallations automate the uninstallation process so that you can uninstall EPM System products on multiple computers without manually specifying uninstallation settings on each machine.

To uninstall EPM System products on multiple computers using the same uninstallation options, record a response file during installation. You can then run a silent uninstallation from the command line, using the options that were saved in the response file.

➤ To run a silent uninstallation:

- 1** Copy the response file that you created during installation to the machine on which you want to run the uninstallation. You can also copy the file to a network drive that is accessible from the machines on which you want to uninstall.

For information about recording a response file during installation, see [“Performing Silent Installations” on page 106](#).

- 2** From the command line, enter a command:

```
uninstall.cmd -silent filename
```

for Windows or

```
uninstall.sh -silent filename
```

for UNIX.

The uninstallation runs in the background.





# What Happens During Installation

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During installation, EPM System Installer installs components and services for the products that you select and creates Start menu items under All Users. During configuration, EPM System Configurator deploys some files to *EPM\_ORACLE\_INSTANCE*.

## Common Files Installed to *MIDDLEWARE\_HOME*

EPM System Installer installs files to *MIDDLEWARE\_HOME*.

The following table describes folders installed in the *MIDDLEWARE\_HOME* directory.

**Table 95** Common Files Installed to *MIDDLEWARE\_HOME*

| Directory      | Contents                                                          |
|----------------|-------------------------------------------------------------------|
| EPMSYSTEM11R1  | <i>EPM_ORACLE_HOME</i>                                            |
| jdk160_21      | Java Development Kit                                              |
| jrockit_160_20 | Oracle JRockit JVMs                                               |
| logs           | Log files                                                         |
| modules        |                                                                   |
| ohs            | Oracle HTTP Server.<br>OPMN is installed to <i>ohs/opmn/bin</i> . |
| oracle_common  | Common Oracle libraries                                           |
| smartview      |                                                                   |
| user_projects  | Location for installation instances                               |
| utils          |                                                                   |

| Directory     | Contents               |
|---------------|------------------------|
| wlserver_10.3 | Oracle WebLogic Server |

## Common Files installed in the EPM Oracle Home Directory

Various files are installed in the *EPM\_ORACLE\_HOME/common* directory by a default installation. Some common components, and thus some files and directories, are optional and might not be installed.

The following table describes the files and folders installed in the *EPM\_ORACLE\_HOME/common* directory.

**Table 96** Common Component Directories Created in the Common Directory

| Directory                 | Contents                                                                 |
|---------------------------|--------------------------------------------------------------------------|
| ADM                       | ADM driver.                                                              |
| aps                       |                                                                          |
| Axis                      |                                                                          |
| bpmui_common              |                                                                          |
| calcmgr                   |                                                                          |
| config                    | EPM System Configurator files                                            |
| CSS                       | Files to support EPM System external authentication                      |
| discman                   |                                                                          |
| docs                      | Product documentation files                                              |
| epmstage                  | Files to support OUI inventory                                           |
| epmstatic                 | Static content                                                           |
| EssbaseJavaAPI            | Java driver used when embedding Essbase in other applications            |
| EssbaseRTC, EssbaseRTC-64 | Essbase runtime client used when embedding Essbase in other applications |
| essbase-studio-sdk        |                                                                          |
| FCMproxy                  |                                                                          |
| financialreporting        |                                                                          |
| HyperionLookandFeel       | Installer user interface files                                           |
| import_export             | LifeCycle management files                                               |



| Directory              | Contents                                                                                              |
|------------------------|-------------------------------------------------------------------------------------------------------|
| J2EE                   |                                                                                                       |
| jakartaCommons         | Common development library files                                                                      |
| javascript             |                                                                                                       |
| jlib                   |                                                                                                       |
| JRE, JRE-64            | Java Runtime Environment files                                                                        |
| loggers                | Files for external authentication logging                                                             |
| Microsoft.NetFramework | Microsoft .Net files                                                                                  |
| misc                   | Shared .jar files to support products.                                                                |
| Naming                 |                                                                                                       |
| ODBC, ODBC-64          | ODBC drivers                                                                                          |
| pdf                    |                                                                                                       |
| planning               |                                                                                                       |
| pma-client-sdk         | Axis client for Performance Management Architect Web services                                         |
| raframeworkrt          | EPM Workspace agent service and libraries, and start and stop shell scripts                           |
| RMI                    |                                                                                                       |
| SAP, SAP-64            | Placeholder directory for SAP files to be copied                                                      |
| Search                 |                                                                                                       |
| SharedServices         | Supporting files for Shared Services                                                                  |
| stellant               |                                                                                                       |
| templates              |                                                                                                       |
| utilities              | Utilities to change the location of EPM System Home and export, import, or validate provisioning data |
| validation             | Supporting files for EPM System Diagnostics                                                           |
| visualCRedistributable |                                                                                                       |
| webservice             |                                                                                                       |
| WSE                    |                                                                                                       |
| XML                    | Common XML components                                                                                 |

The following table describes other files and folders installed in the *EPM\_ORACLE\_HOME* directory.

**Table 97 Other Common Directories**

| Directory      | Contents                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| .patch_storage |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| _vpddb         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| bin            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| ccr            | Oracle Configuration Manager files                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| cfgtoollogs    | Logs for EPM System Configurator                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| diagnostics    | <p>Installation logs for all products are located in <code>/diagnostics/logs/install</code>. There is a log file for each assembly, named <i>productinstall.log</i>; for example, <i>hss-install.log</i> and a log file for installation, <i>installTool-install-DateTime.log</i>.</p> <p>A directory where some products store log files.</p> <p>Log files are created in <code>diagnostics/logs</code>, in product-specific directories. For example, Shared Services logs are created in <i>EPM_ORACLE_INSTANCE/diagnostics/logs/sharedservices</i>.</p> <p>The first time you run Oracle Hyperion Enterprise Performance Management System Diagnostics, it creates <i>logszip</i>.</p> <p>For more information about log files, see the <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide</i></p> |
| install        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| inventory      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| ldap           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| logs           | Log files                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| nls            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Opatch         | Oracle patching tool files                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| oui            | Oracle installation files                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| products       | A directory for each product's product files. Each product's directory structure is described later in this chapter.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| tmp            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| uninstall      | Files to support the uninstallation process                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| upgrades       |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

## Common Files Deployed to *EPM\_ORACLE\_INSTANCE*

During configuration, EPM System Configurator deploys some files to *EPM\_ORACLE\_INSTANCE*.

The following table describes the common files and folders deployed to the *EPM\_ORACLE\_INSTANCE* directory.

**Table 98** Common files deployed to *EPM\_ORACLE\_INSTANCE*

| Directory            | Contents |
|----------------------|----------|
| aps                  |          |
| auditlogs            |          |
| bin                  |          |
| BPMS                 |          |
| ccr                  |          |
| config               |          |
| diagnostics          | .        |
| DisclosureManagement |          |
| EssbaseServer        |          |
| HPS                  |          |
| httpConfig           |          |
| Planning             |          |
| products             |          |
| ReportingAnalysis    |          |
| tmp                  |          |





# Rehosting Foundation Services Web Application

---

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|-------------------------------------|-----|

If you want to rehost the Foundation Services Web Application or the Shared Services Registry database to a different machine, follow the procedures in this appendix.

## Rehosting Foundation Services

To rehost the Foundation Services Web application on a new machine, you use EPM System Configurator to create a cluster, update the Web Server, then update the logical Web application for Foundation Services to point to the Web Server, relying on the Oracle HTTP Server clustering.

This procedure assumes that you have already installed and configured Foundation Services on Node 1. During configuration with EPM System Configurator, you have already created a new Shared Services database, created a new WebLogic domain, and configured the Web server.

► To rehost the Foundation Services Web application on Node 2:

- 1 Start the WebLogic Administration Server on Node 1.
- 2 Install and configure Foundation Services on Node 2. During configuration with EPM System Configurator:
  - Create a new *EPM\_ORACLE\_INSTANCE*.
  - During database configuration for Shared Services, select **Connect to a previously configured Shared Services database**, and specify the Shared Services database that you configured for Node 1.
  - Deploy to the same WebLogic domain.
  - Configure the Web Server.
- 3 Reconfigure the Web server again on Node 1 using EPM System Configurator.
- 4 Stop WebLogic Admininstration Server on Node 1.
- 5 Start Weblogic Node Manager on both Node 1 and Node 2. For example, run `startNodeManager.cmd` in *MIDDLEWARE\_HOME*/wlserver\_10.3/server/bin.
- 6 Start WebLogic Admininstration Server on Node 1.

- 7 From the WebLogic Administration Server Console, start the Shared Services managed server on Node 1 and Node 2.

**Note:** Oracle recommends that you start and stop Shared Services on Node 2 using the WebLogic Administration Server Console to avoid Shared Services startup failures on Node 2.

- 8 Start the Web Server on Node 1 only.
- 9 Access Shared Services using the following URL: `http://Node1:19000/interop/index.jsp`.
- 10 To test that high availability is working, stop Shared Services on Node 1 and launch Shared Services again using the following URL: `http://Node1:19000/interop/index.jsp`.  
WebLogic redirects and launches Shared Services from Node 2.



# Additional Essbase Configuration

## In This Appendix

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This appendix describes additional configuration settings you might need for Essbase.

## Changing JVMModuleLocation (UNIX)

The *JVMMODULELOCATION* setting in the *essbase.cfg* file enables you to designate a specific installation of JRE for use with Essbase, and is required to enable Data Mining, Shared Services, custom defined functions, triggers, and external authentication.

This setting is particularly useful if you have multiple versions of Java installed on the Essbase Server computer.

During Essbase Server configuration, the correct setting for *JVMMODULELOCATION* is automatically added to *essbase.cfg*.

To change the *JVMMODULELOCATION* parameters, you must specify the full path and file name of the Java Virtual Machine (JVM) library. The location and name of the library varies, depending on the operating system that you are using. EPM System Installer installs JRE in *EPM\_ORACLE\_HOME/JDK160\_21/jre*.

**Note:** To run 64-bit Essbase on any 64-bit operating system requires a 64-bit JVM.

## Managing Memory with JvmModuleLocation

If you are not using Data Mining, Shared Services, custom defined functions, triggers, or external authentication, you can reduce the amount of memory used by editing *essbase.cfg* and setting *JvmModuleLocation* to null (empty).

If you are using these features, and need to reduce the amount of memory used, then you can reduce the JVM heap size by setting the following environment variables:

```
ESS_JVM_OPTION1=-Xmx16m
```

Because the default minimum and maximum for JVM heap size are different for different platforms and versions, set the correct value for your environment. For example, see the following as a reference: [http://publib.boulder.ibm.com/infocenter/wasinfo/v4r0/index.jsp?topic=/com.ibm.support.was.doc/html/Java\\_SDK/1132680.html](http://publib.boulder.ibm.com/infocenter/wasinfo/v4r0/index.jsp?topic=/com.ibm.support.was.doc/html/Java_SDK/1132680.html).

## Changing JVMMODULELOCATION (Windows)

The `JVMMODULELOCATION` setting in the `essbase.cfg` file enables you to designate a specific installation of JRE for use with Essbase, and is required to enable Data Mining, Shared Services, custom defined functions, triggers, and external authentication.

This setting is particularly useful if you have multiple versions of Java installed on the Essbase Server computer.

During Essbase Server configuration, the correct setting for `JVMMODULELOCATION` is automatically added to `essbase.cfg`.

To change `JVMMODULELOCATION` parameters, you must specify the full path and file name of the Java Virtual Machine (JVM) library. The location and name of the library varies, depending on the operating system that you are using. EPM System Installer installs JRE in `EPM_ORACLE_HOME/JDK160_21/jre`.

**Note:** To run 64-bit Essbase on any 64-bit operating system requires a 64-bit JVM.

## Configuring 32-Bit Essbase Server on a 64-Bit Platform

EPM System Installer installs both 32-bit and 64-bit Essbase Server on a machine with a 64-bit operating system. If you want to use the 32-bit binaries on a 64-bit machine, use the procedure below for your platform.

**Note:** If you want to use OPMN to manage Essbase, note that configuring 32-bit binaries on a 64-bit platform is not supported

## Windows

► To configure 32-bit binaries to run on a 64-bit Windows machine:

**1** Install Foundation Services and Essbase but do not run EPM System Configurator.

**2** Rename this directory:

`%EPM_ORACLE_HOME%/products/Essbase/EssbaseServer`

To:

`%EPM_ORACLE_HOME%/products/Essbase/EssbaseServer-64`

**3** Rename this directory:



`%EPM_ORACLE_HOME%/products/Essbase/EssbaseServer-32`

To:

`%EPM_ORACLE_HOME%/products/Essbase/EssbaseServer`

- 4 **Rename** `%EPM_ORACLE_HOME%/bin` to `%EPM_ORACLE_HOME%/bin-64`
- 5 **Rename** `%EPM_ORACLE_HOME%/bin-32` to `%EPM_ORACLE_HOME%/bin`.
- 6 **Run EPM System Configurator to configure Essbase but do not perform the Essbase cluster setup task or deploy Essbase in stand-alone mode.**
- 7 **Modify** `%EPM_ORACLE_INSTANCE%/EssbaseServer/essbaseserver1/bin/essbase.cfg` to use a 32-bit JRE (in the `JvmModuleLocation` line). For example, set this parameter to:  
`d:/oracle/Middleware/EPMSysstem11R1/common/JRE/Sun/1.6.0/bin/server/jvm.dll`
- 8 **Modify** `%EPM_ORACLE_INSTANCE%/EssbaseServer/essbaseserver1/bin/setEssbaseEnv.bat` to use a 32-bit ODBC (in the `ODBCINST=` line). For example, set this parameter to:  
`d:/Oracle/Middleware/EPMSysstem11R1/common/ODBC/Merant/6.0/odbcinst.ini`
- 9 **Modify the PATH environment variable so that it points to the 32-bit version:**  
`%EPM_ORACLE_HOME%/common/ODBC/Merant/6.0/Drivers`
- 10 **Make a copy of** `%EPM_ORACLE_INSTANCE%/EssbaseServer/essbaseserver1/startEsscmd.bat` to `startEssbase.bat` and edit the file to change the `ESSCMD` line to `ESSBASE`.
- 11 **Start Essbase Server using** `startEssbase.bat` in `%EPM_ORACLE_INSTANCE%/EssbaseServer/essbaseserver1/bin`.

## Solaris

- To configure 32-bit binaries to run on a 64-bit Solaris machine:

- 1 **Install Foundation Services and Essbase but do not run EPM System Configurator.**
- 2 **Rename this directory:**

`$EPM_ORACLE_HOME/products/Essbase/EssbaseServer`

To:

`$EPM_ORACLE_HOME/products/Essbase/EssbaseServer/EssbaseServer-64`

- 3 **Rename this directory:**

`$EPM_ORACLE_HOME/products/Essbase/EssbaseServer-32`

To:

`$EPM_ORACLE_HOME/products/Essbase/EssbaseServer`

- 4 **Copy** `wallet` folder from `EssbaseServer-64/bin` to `EssbaseServer/bin`.

- 5 Run EPM System Configurator to configure Essbase but do not perform the Essbase cluster setup task or deploy Essbase in stand-alone mode.
- 6 Modify `$EPM_ORACLE_INSTANCE/EssbaseServer/essbaseserver1/bin/essbase.cfg` to use a 32 bit JRE (JvmModuleLocation line). For example, set this parameter to:  

```
/home/user1/Oracle/Middleware/EPMSysstem11R1/common/JRE/Sun/1.6.0/lib/sparc/server/libjvm.so
```
- 7 Modify the following `LD_LIBRARY_PATH` in `ARBORPATH/hyperionenv.doc` from:  

```
LD_LIBRARY_PATH=EPM_ORACLE_HOME/..jdk160_11/jre/lib/sparc/
server:EPM_ORACLE_HOME/..jdk160_11/jre/lib/sparc:EPM_ORACLE_HOME/common/ODBC/
Merant/6.0/lib:$ESSBASEPATH/bin:$LD_LIBRARY_PATH
```

To:  

```
LD_LIBRARY_PATH=EPM_ORACLE_HOME/common/JRE/Sun/1.6.0/lib/sparc/
server:EPM_ORACLE_HOME/common/JRE/Sun/1.6.0/lib/sparc:EPM_ORACLE_HOME/common/ODBC/
Merant/6.0/lib:$ESSBASEPATH/bin:$LD_LIBRARY_PATH
```
- 8 Make a copy of the `%EPM_ORACLE_INSTANCE%/EssbaseServer/essbaseserver1/startEsscmd.bat` to `startEssbase.bat` and edit the file to change the `ESSCMD` line to `ESSBASE`.
- 9 Start Essbase Server (`startEssbase.sh`) from `$EPM_ORACLE_INSTANCE/EssbaseServer/essbaseserver1/bin`.

## AIX

- To configure 32-bit binaries to run on a 64-bit AIX machine:
- 1 Install Foundation Services and Essbase but do not run EPM System Configurator.
  - 2 Rename this directory:  
`$EPM_ORACLE_HOME/products/Essbase/EssbaseServer`  
To:  
`$EPM_ORACLE_HOME/products/Essbase/EssbaseServer-64`
  - 3 Rename this directory:  
`$EPM_ORACLE_HOME/products/Essbase/EssbaseServer-32`  
To:  
`$EPM_ORACLE_HOME/products/Essbase/EssbaseServer`
  - 4 Copy `wallet` folder from `EssbaseServer-64/bin` to `EssbaseServer/bin`.
  - 5 Run EPM System Configurator to configure Essbase but do not perform the Essbase cluster setup task or deploy Essbase in stand-alone mode.
  - 6 Modify `$EPM_ORACLE_INSTANCE/EssbaseServer/essbaseserver1/bin/essbase.cfg` to use a 32 bit JRE (JvmModuleLocation line) For example, set this parameter to:

```
/home/user1/Oracle/Middleware/EPMSysstem11R1/common/JRE/IBM/1.6.0/bin/classic/
libjvm.a
```

- 7 **Add the following setting in LIB\_PATH in ARBORPATH/hyperionenv.doc.**  
`$EPM_ORACLE_HOME/common/JRE/IBM/1.6.0/lib/ppc`
- 8 **Make a copy of %EPM\_ORACLE\_INSTANCE%/EssbaseServer/essbaseserver1/  
startEsscmd.bat to startEssbase.bat and edit the file to change the ESSCMD line to  
ESSBASE.**
- 9 **Start Essbase Server (startEssbase.sh) from \$EPM\_ORACLE\_INSTANCE/  
EssbaseServer/essbaseserver1/bin.**

## Linux

- To configure 32-bit binaries to run on a 64-bit Linux machine:

- 1 **Install Foundation Services and Essbase but do not run EPM System Configurator.**
- 2 **Rename this directory:**

```
$EPM_ORACLE_HOME/products/Essbase/EssbaseServer
```

To:

```
$EPM_ORACLE_HOME/products/Essbase/EssbaseServer-64
```

- 3 **Rename this directory:**

```
$EPM_ORACLE_HOME/products/Essbase/EssbaseServer-32
```

To:

```
$EPM_ORACLE_HOME/products/Essbase/EssbaseServer
```

- 4 **Run EPM System Configurator to configure Essbase but do not perform the Essbase cluster setup task  
or deploy Essbase in stand-alone mode.**
- 5 **Modify \$EPM\_ORACLE\_INSTANCE/EssbaseServer/essbaseserver1/bin/  
essbase.cfg to use a 32-bit JRE (in the JvmModuleLocation line). For example, set this  
parameter to:**

```
home/user1/Oracle/Middleware/EPMSysstem11R1/common/JRE/Sun/1.6.0/lib/i386/server/
libjvm.so
```

- 6 **Modify the following LD\_LIBRARY\_PATH in hyperionenv.doc from:**

```
LD_LIBRARY_PATH=EPM_ORACLE_HOME/../../jdk160_11/jre/lib/i386/server:
EPM_ORACLE_HOME/../../jdk160_11/jre/lib/i386:EPM_ORACLE_HOME/common/
ODBC/Merant/6.0/lib:$ESSBASEPATH/bin:$LD_LIBRARY_PATH
```

To:

```
LD_LIBRARY_PATH=EPM_ORACLE_HOME/common/JRE/Sun/1.6.0/lib/i386/
server:EPM_ORACLE_HOME/common/JRE/Sun/1.6.0/lib/i386:EPM_ORACLE_HOME/common/ODBC/
Merant/6.0/lib:$ESSBASEPATH/bin:$LD_LIBRARY_PATH
```

- 7 **Make a copy of %EPM\_ORACLE\_INSTANCE%/EssbaseServer/essbaseserver1/  
startEsscmd.bat to startEssbase.bat and edit the file to change the ESSCMD line to  
ESSBASE.**

**8 Start Essbase Server** (`startEssbase.sh`) from `$EPM_ORACLE_INSTANCE/`  
`EssbaseServer/essbaseserver1/bin`.

## Configuring the 32-bit Runtime Client on a 64-bit Windows Platform

EPM System Installer installs both 32-bit and 64-bit Essbase Client on a machine with a 64-bit operating system.

If you want to use 32-bit and 64-bit client applications on the same machine, and you don't want to have to recompile applications, use the following procedure.

► To use the 32-bit Runtime Client on a 64-bit Microsoft Windows machine:

On the 64-bit machine, run the precompiled 32-bit client program from a command prompt or from a shell window on which `ESSBASEPATH` is set to the installation directory of the 32-bit Runtime Client and `PATH` is set to include the `bin` subdirectory under the `ESSBASEPATH` directory.

For example, on Windows AMD64 set the following:

```
ESSBASEPATH=%EPM_ORACLE_HOME%\common\EssbaseRTC\11.1.2.0
PATH=%ESSBASEPATH%\bin;%PATH%
```

For information on Application Programming Interface and Runtime Client, see the *Oracle Essbase API Reference*.



# Essbase 32-Bit and 64-Bit Compatibility

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## Essbase 32-Bit and 64-Bit Client and Server Compatibility

The following table summarizes the compatibility of 32-bit and 64-bit clients and servers with Essbase Server:

| Client                                         | Server                              | Essbase Server: Platform to Which Client Can Connect |
|------------------------------------------------|-------------------------------------|------------------------------------------------------|
| 32-bit Essbase Administration Services Console | 32-bit Administration Server        | 32-bit, 64-bit                                       |
| 32-bit Essbase Administration Services Console | 64-bit Administration Server        | 32-bit, 64-bit                                       |
| 64-bit Essbase Administration Services Console | 64-bit Administration Server        | 64-bit                                               |
| 32-bit Essbase Studio Console                  | 32-bit Essbase Studio Server        | 32-bit, 64-bit                                       |
| 32-bit Essbase Studio Console                  | 64-bit Essbase Studio Server        | 32-bit, 64-bit                                       |
| 64-bit Essbase Studio Console                  | 64-bit Oracle Essbase Studio Server | 64-bit                                               |
| 32-bit Essbase Integration Services Console    | 32-bit Essbase Integration Server   | 32-bit , 64-bit                                      |
| 32-bit Essbase Integration Services Console    | 64-bit Essbase Integration Server   | 32-bit , 64-bit                                      |
| 32-bit Smart View                              | 32-bit Provider Services            | 32-bit, 64-bit                                       |
| 32-bit Smart View                              | 64-bit Provider Services            | 64-bit                                               |
| 32-bit Essbase Administration Services Console | 32-bit Provider Services            | 32-bit, 64-bit                                       |
| 64-bit Essbase Administration Services Console | 64-bit Provider Services            | 64-bit                                               |
| 32-bit Java API or XMLA client application     | 32-bit Provider Services            | 32-bit, 64-bit                                       |
| 64-bit Java API or XMLA client application     | 64-bit Provider Services            | 64-bit                                               |

# Essbase API Compatibility on 32-Bit and 64-Bit Platforms

Essbase provides APIs for 32-bit and 64-bit platforms, which you can use to write and compile client programs that interface with Essbase Server.

- Client programs developed for 32-bit platforms using the Essbase C API or Visual Basic API can run on 32-bit platforms and connect to either 32-bit or 64-bit Essbase Server.
- Precompiled client programs developed using the 32-bit Essbase Visual Basic API can run on 64-bit Windows platforms connecting to 64-bit Essbase Server, as long as the 32-bit runtime environment is set up as according to the documented instructions.
- Client programs developed for 64-bit platforms using the Essbase C API:
  - Can run on 64-bit platforms and connect to 32-bit or 64-bit Essbase Servers
  - Cannot run on 32-bit platforms

---

**Caution!** Client programs developed for 64-bit platforms do not require the #pragma directive to set the byte alignment.

---

- You cannot develop a client program for 64-bit Windows using the Essbase Visual Basic API.

The following table summarizes the compatibility of client programs developed with Essbase APIs:

| Client Development: Platform with API Version | Platform on which Client Can Run | Essbase Server: Platforms to Which Client Can Connect |
|-----------------------------------------------|----------------------------------|-------------------------------------------------------|
| 32-bit C API / Runtime Client                 | 32-bit                           | 32-bit, 64-bit                                        |
| 32-bit VB API / Runtime Client                | 32-bit Windows                   | 32-bit, 64-bit                                        |
|                                               | 64-bit Windows                   | 64-bit                                                |
| 32-bit Java (API or XMLA client application)  | 32-bit Provider Services server  | 32-bit, 64-bit                                        |
| 32-bit embedded Java (API client application) |                                  | 32-bit, 64-bit                                        |
| 64-bit C API / Runtime Client                 | 64-bit                           | 32-bit, 64-bit                                        |
| 64-bit Java (API or XMLA client application)  | 64-bit Provider Services server  | 64-bit                                                |
| 64-bit embedded Java (API client application) |                                  | 64-bit                                                |

For information on the compatibility of 32-bit and 64-bit EPM System clients and servers with Essbase Server, see [“Essbase 32-Bit and 64-Bit Client and Server Compatibility” on page 341](#).



# JDBC URL Attributes

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## JDBC Drivers

During configuration, on the Configure Database page, click Advanced to specify additional JDBC parameters, which are used by EPM System JDBC drivers to connect to the database.

The following table describes the format to use to enter the parameters if you are using JDBC drivers.

| Database        | Format                                                                                        |
|-----------------|-----------------------------------------------------------------------------------------------|
| Oracle Database | <code>jdbc:oracle:thin:@hostname:port:SID</code>                                              |
| SQL Server      | <code>jdbc:weblogic:sqlserver://hostname:port;databaseName=databaseName</code>                |
| DB2             | <code>jdbc:weblogic:db2://hostname:port;databaseName=databaseName;DynamicSections=3000</code> |

The following table describes additional information about the parameters:

| Property             | SQL Server | DB2 |
|----------------------|------------|-----|
| LOADLIBRARYPATH      | Yes        | Yes |
| MAXPOOLEDSTATEMENTS  | Yes        | Yes |
| ALTERNATESERVERS     | Yes        | Yes |
| CONNECTIONRETRYCOUNT | Yes        | Yes |
| CONNECTIONRETRYDELAY | Yes        | Yes |
| LOADBALANCING        | Yes        | Yes |
| DYNAMICSECTIONS      |            | Yes |
| CREATEDFAULTPACKAGE  |            | Yes |
| REPLACEPACKAGE       |            | Yes |

| Property     | SQL Server | DB2 |
|--------------|------------|-----|
| DATABASENAME | Yes        | Yes |

For Oracle Database parameters, see the Oracle Thin JDBC Driver documentation.

## URL for Oracle RAC

To provide client-side failover and load-balancing for Oracle RAC, enter the URL in the form of:

```
jdbc:oracle:thin:@(DESCRIPTION=(LOAD_BALANCE=on)
 (ADDRESS=(PROTOCOL=TCP) (HOST=host1) (PORT=1521))
 (ADDRESS=(PROTOCOL=TCP) (HOST=host2) (PORT=1521))
 (CONNECT_DATA=(SERVICE_NAME=service)
 (FAILOVER_MODE =
 (TYPE = SELECT)
 (METHOD = BASIC)
 (RETRIES = 180)
 (DELAY = 5)
)
)
)
```

## URL for SSL

To enable SSL for the JDBC connections, during configuration, on the Configure Database page, click Advanced and select “Use secure connection to the database (SSL).”

Use the following additional parameters when JDBC SSL is selected and you are using DB2 or Microsoft SQL Server.

- ENCRYPTIONMETHOD=SSL
- TRUSTSTORE=*Path to trust store*
- TRUSTSTOREPASSWORD=*trust store password*
- VALIDATESERVERCERTIFICATE="true"

Use the following URL format when JDBC SSL is selected and you are using Oracle Database.

```
jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(PROTOCOL=tcps)
```



```
(HOST=host1) (PORT=1521))
```

```
(CONNECT_DATA=(SERVICE_NAME=servicename)
```

```
)
```

```
)
```





# Database Information for Financial Management

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## Database Connection Pooling

During Financial Management configuration, you specify the maximum number of relational database connections used by each application. Financial Management uses connection pooling to communicate with the database. Connection pooling enables more efficient database utilization and does not require that each user be set up in the relational repository.

During configuration, EPM System Configurator enables you to specify the number of pooled database connections. The number of connections that you specify in EPM System Configurator is the maximum number of pooled connections consumed by an application. The pool starts with eight connections. If, after a certain number of attempts, the pool is unable to service a request for an additional connection, it adds eight more connections. The system continues adding blocks of eight connections until it reaches the maximum number of connections defined in the utility. If the system needs an additional connection beyond this limit, a temporary connection is created to service the request, which is closed after the task is complete.

The system also creates additional connection pools that are reserved for system use and are not used for user activity. The system-use pools are divided into these connection types:

- A pool of nine connections per application is reserved for system activity.
- A pool of eight connections per application is reserved for error handling.
- A pool of eight connections per application server is created for user logon activities. The user logon pool can grow by four to the system-defined maximum value of 16 connections. Connections required above the maximum are temporary.

In general, 25 connections are dedicated to system-level activities: eight connections reserved for each application server, and 17 connections reserved for each application.

Connection use is dependent on the activity type. Users with Read access, which are the majority of users in an application, generally use one or no connections. Users with Write access can consume more connections, as they write to the database. The number of connections consumed by a user with Write access, for example, a consolidator, depends on the application server hardware and quantity of data being written. In general, users with Write access may use 5 – 10 connections.

Financial Management opens the defined number of connections when an application is first opened. The connections are then available for subsequent users of the system. If a user process requests a connection, and all connections are in use, the system polls the connection pool for a short time, waiting for an available connection. If no connection is available, the system creates eight connections and adds them to the pool. The connection pool is limited to the total that you define in EPM System Configurator.

Connections are application-specific. The default pool is created only after an application is opened. However, connections are not released on an application basis; they are released on an application server basis. Thus, all connections are not released until the application server has no Financial Management users accessing any application.

**Note:** Note that application processes do not shut down even when all users have logged out of all applications if the Financial Management Service is running, because the service perpetuates application instances. In addition, in an environment with more than one Financial Management application server, all users might need to log out of all applications on all servers before the application process shuts down and the database connections are released. In both cases, you must also stop the Financial Management service.

Financial Management also supports Extended Analytics, which enables extracting data to a relational database for use with other systems, such as Analytic Services. The extract process has a dedicated connection pool that is created when a star schema is created. The default pool is 16 temporary connections that are destroyed when the processing is complete.

## Example 1

Three applications on one application server, default maximum connection pooling is used (40 connections)

- Application A is logged on: 8 connections (plus system)
- Application B is logged on: 8 connections (plus system)
- Application C is logged on: 8 connections (plus system)
- System connections: 59 (8 plus 17 per application)
- Total connections: 83

**Note:** Total connections could grow by 96 if all application connection pools expand to the system maximum as defined in EPM System Configurator (default is 40).

- Application B is logged off (no users)
- Total connections: 83
- All users log off all applications
- Total connections: 0

## Example 2

One application on two application servers, default maximum connection pooling is used (40 connections)

- Application A is logged on (server 1): 8 connections (plus system)
- Application A is logged on (server 2): 8 connections (plus system)
- System connections: 50 (8 plus 17 per application per application server)
- Total connections: 66
- Application A (server 2) is logged off (no users)
- Total connections: 33
- All users log off all applications
- Total connections: 0

At times, connectivity between the application server and the database server might be lost because of network issues, for example. If the system detects that a connection is no longer valid, it attempts to re-create the connection.

Deleting applications also consumes the default number of pooled connections. Before deleting an application, Financial Management opens the application to verify security access, consuming the default number of connections. After security is validated, the system deletes the application.





# Updating the Shared Services Registry

---

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| <a href="#">Editing the Shared Services Registry .....</a>                           | <a href="#">352</a> |

You can edit the Shared Services Registry using a command line utility. Use this utility only if you are unable to make the required changes to the Shared Services Registry using EPM System Configurator.

**Tip:** You can make most changes using EPM System Configurator. For example, to make changes to a deployed Web application, you can select the “Configure Logical Address for Web Applications” task in EPM System Configurator to make changes without having to redeploy the Web application. See [“Update Logical Address for Web Applications” on page 145](#).

You use the `epmsys_registry.bat` utility (`epmsys_registry.sh` on UNIX) to make any required changes to the Shared Services Registry.

## Understanding the Shared Services Registry Component Hierarchy

To make corrections to the Shared Services Registry, you have to understand its structure. During configuration of 11.1.x products, EPM System Configurator automatically updates the Shared Services Registry with components for each product. Components also have child components, creating a hierarchy. Each component of the hierarchy has its own component properties. You need to know both the component names and the component property names to update the Shared Services Registry.

For example, the `ESSBASE_PRODUCT` component includes the following component properties:

- `host`
- `agent_PortNumber`

To find the component property names and child components for any component, you can use a command to view the component in the Shared Services Registry. See [“Viewing the Components in the Shared Services Registry” on page 352](#).

## Editing the Shared Services Registry

► To edit the Shared Services Registry:

- 1 **Back up the Shared Services Registry.**
- 2 **On a machine hosting the 11.1.x EPM System software, go to `EPM_ORACLE_INSTANCE/bin` and run the following command:**

```
epmsys_registry view componentType
```

You need to view the component hierarchy to get the component property names that required to delete a component or update a component property.

For information see [“Viewing the Components in the Shared Services Registry” on page 352](#).

- 3 **Depending on the required changes, refer to the following commands:**

To delete a component, see [“Deleting a Component Instance” on page 353](#).

To update a component property, see [“Updating a Component Property” on page 353](#).

**Note:** When you run `epmsys_registry` commands on UNIX platforms, all # must be preceded by \.

- 4 **If you changed the LOGICAL\_WEB\_APP property for any product, run EPM System Configurator and configure the Web Server again. (On the Task Selection page, select the Oracle Hyperion Foundation Services Web Server Configuration task.)**

## Viewing the Components in the Shared Services Registry

Before you can delete a component or update a component property, you need to view the component hierarchy to get the component property names and values.

► To view the component hierarchy:

- 1 **Go to `EPM_ORACLE_INSTANCE/bin` and use the following command:**

```
epmsys_registry view componentType
```

where *componentType* is the name of the component in the Oracle Hyperion Shared Services Registry.

This command displays all the components in the specified hierarchy, displaying only the immediate children of the component. The information is displayed in the console.

For example, to view all the components in the `PLANNING_PRODUCT` hierarchy, run:



```
epmsys_registry view SYSTEM9/PLANNING_PRODUCT
```

**2 If needed, repeat the command to get the property names for a subcomponent.**

For example, LOGICAL\_WEB\_APP is a child of PLANNING\_PRODUCT. To view the properties for LOGICAL\_WEB\_APP for Planning, enter the following command:

```
epmsys_registry view SYSTEM9/PLANNING_PRODUCT/LOGICAL_WEB_APP
```

**3 From the display, note the following information about components you want to delete or update:**

- Component ID for any components you want to delete or update
- Component property names and values for any components you want to update

For example, the LOGICAL\_WEB\_APP for Oracle Hyperion Planning has several properties, including *context*, *port*, and *host*.

## Deleting a Component Instance

You delete a component instance by referring to the component's ID that is displayed when you view the component hierarchy.

- To delete a component from the component hierarchy, go to *EPM\_ORACLE\_INSTANCE/bin* and run the following command:

```
epmsys_registry deletecomponent #componentID
```

where *componentID* is the component's ID that you found when you viewed the component hierarchy.

On UNIX, run:

```
epmsys_registry.sh deletecomponent \#componentID
```

Deleting a node does not delete its children.

**Tip:** If you are deleting a product node, first delete all the children of the node and then delete the product node.

---

**Caution!** Ensure that you delete the correct component.

---

## Updating a Component Property

You update a component property by referring to the component ID and the component property name that are displayed when you view the component hierarchy.

- To update a component property, go to *EPM\_ORACLE\_INSTANCE/bin* and run the following command:

```
epmsys_registry updateproperty #componentID/@componentProperty value
```

where *componentID* is the component's ID you found when you viewed the component hierarchy, *componentProperty* is the component property name you want to update, and *value* is the new value for the component property.

On UNIX, run:

```
epmsys_registry.sh updateproperty \#componentID/@componentProperty value
```

Component property names are case sensitive.

**Tip:** Look for the component property names in the section called “Properties” when you view the component hierarchy. In addition, you can update the host a component is running on using the property name “host.”

For example, to change the port number for the Essbase Server with the component ID 99999 to port number 1425, enter the following command:

```
epmsys_registry updateproperty #99999/@agent_PortNumber 1425
```



# Enabling an X Virtual Frame Buffer for Financial Reporting and Production Reporting

---

## In This Appendix

|                                                                          |     |
|--------------------------------------------------------------------------|-----|
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| Enabling Xvfb for Solaris 9 .....                                        | 355 |
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| Enabling Xvfb for Oracle Enterprise Linux/Red Hat Enterprise Linux ..... | 356 |
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## Enabling Xvfb for AIX 5L

► To enable Xvfb:

- 1 Log on to the computer on which you are running the Reporting and Analysis Web application server components as the root user.
- 2 Determine whether Virtual Frame Buffer support is available on your computer by issuing the following command:

```
lslpp -l X11.vfb
```

- 3 If X11.vfb is not installed, install it from your AIX installation media. After installing the package, apply the latest PTF from:

<http://techsupport.services.ibm.com>

- 4 Start Xvfb:

```
/usr/bin/X11/X -force -vfb :1
```

where :1 is the a display number not already in use.

## Enabling Xvfb for Solaris 9

► To enable Xvfb:

- 1 Log on to the computer on which you are running the Reporting and Analysis Web application server components as the root user.
- 2 Obtain and compile the X11R6 source distribution from:

ftp://x.org/, or obtain and install the binary distribution from [ftp://www.ferret.noaa.gov/special\\_request/xvfb/solaris](ftp://www.ferret.noaa.gov/special_request/xvfb/solaris)

### 3 Start Xvfb:

```
/usr/X11R6/bin/Xvfb :1 -screen 0 1152x900x8 &
```

where :1 is the a display number not already in use.

## Enabling Xvfb for Solaris 10

► To enable Xvfb:

- 1 Log on to the computer on which you are running the Reporting and Analysis Web application server components as the root user.
- 2 Determine whether Virtual Frame Buffer support is available on your computer by issuing the following command:

```
pkgchk -l SUNWxwsrv
```

- 3 If SUNWxwsrv is not installed, install it from the Solaris installation media.

### 4 Start Xvfb:

```
/usr/openwin/bin/Xvfb :1 > /dev/null 2>&1 &
```

where :1 is the a display number not in use.

## Enabling Xvfb for Oracle Enterprise Linux/Red Hat Enterprise Linux

► To enable Xvfb:

- 1 Log on to the computer on which you are running the Reporting and Analysis Web application server components as the root user.
- 2 Determine whether Virtual Frame Buffer support is available on your computer by issuing the following command:

```
rpm -aq | grep -i 'vfb'
```

**Note:** If Xvfb is not installed, install it from your installation media, RHN, or ULN Web site.

### 3 Start Xvfb:

```
/usr/X11R6/bin/Xvfb :1 -screen 0 1152x900x8 &
```

where :1 is the a display number not already in use.

# Enabling Xvfb for HP-UX

► To enable Xvfb:

- 1 Log on to the computer on which you are running the Reporting and Analysis Web application server components as the root user.
- 2 Determine whether Virtual Frame Buffer support is available on your computer by issuing the following command:

```
swlist -l product | grep 'Xserver cumulative patch'
```

- 3 Ensure that the patch level installed on your system corresponds with HP's recommended level (currently PHSS\_31293).
- 4 Copy `/etc/X11/X0screens` to `/etc/X11/X1screens`, where 1 is a display number not already in use; for example:

```
cp /etc/X11/X0screens /etc/X11/X1screens
```

- 5 Edit `/etc/X11/X1screens` by adding these lines to the end of the file:

```
ServerOptions
ServerMode Xvfb
```

- 6 Start Xvfb:

```
nohup /usr/bin/X11/Xvfb :1 -screen 0 1024x800x8 \
-pn -fp /usr/lib/X11/fonts/misc -sp /etc/X11/SecurityPolicy &
```

where :1 is the display number not already in use.

## Setting the DISPLAY Variable

Prior to starting the Reporting and Analysis Web application server components on UNIX, set the `DISPLAY` environment variable to an available physical or virtual (Xvfb) graphics device address; for example:

```
DISPLAY=hostname:0.0 ; export DISPLAY
```

For the sake of convenience, it is recommended that `DISPLAY` be initialized automatically by editing the Oracle Hyperion Reporting and Analysis Web application server components start scripts.

**Note:** Only the Financial Reporting Web application server component and Production Reporting require `DISPLAY` to be set. Oracle Hyperion SQR Production Reporting requires `DISPLAY` in order to generate charts using the New Graphics feature.

**Tip:** You can set display for Financial Reporting by editing `setCustomParamsFinancialReporting.sh` in `EPM_ORACLE_INSTANCE/bin/deploymentScripts`.





# Using Release 11.1.2.1 Products With Components From Earlier Releases

---

## In This Appendix

|                                                                                     |     |
|-------------------------------------------------------------------------------------|-----|
| Using Disclosure Management 11.1.2.1 With Release 9.3.3 Products .....              | 359 |
| Using Financial Close Management Release 11.1.2.1 With Release 9.3.3 Products ..... | 364 |

In Release 11.1.2.1, EPM System products are interoperable with other EPM System Release 11.1.2.1 products. However, there are certain scenarios in which you can use Release 9.3.3 components with components from Release 11.1.2.1. This appendix describes each scenario and contains instructions for deploying in a multiple-release environment. The scenarios covered are:

- Using Disclosure Management Release 11.1.2.1 With Release 9.3.3 Products
- Using Financial Close Management Release 11.1.2.1 With Release 9.3.3 Products

For specific information on which products are compatible, see the “Release Compatibility” tab in the *Oracle Hyperion Enterprise Performance Management System Certification Matrix*.

## Using Disclosure Management 11.1.2.1 With Release 9.3.3 Products

If you want to use EPM System Release 11.1.2.1 Disclosure Management with EPM System Release 9.3.3 products, use this section to understand how this multiple release environment should be set up in your environment.

Disclosure Management allows you to assemble a reporting package for submission to a regulatory agency that includes financial statements as well as supporting schedules and commentary which may exist in Microsoft Excel, Word, and a Financial Reporting report. While viewing Financial Reporting documents in Workspace, users can perform data source level mapping with the XBRL Taxonomy Mapping Tool, that allows for reusable taxonomy element mapping within Hyperion Financial Management, Planning, and Essbase.

To use Disclosure Management Release 11.1.2.1 with Release 9.3.3 products, you need to set up a separate instances for each product release. The high-level steps to perform are dependent on whether you are using Performance Management Architect and these scenarios are described in this section.

## Using Disclosure Management 11.1.2.1 With Release 9.3.3 Without Performance Management Architect

These steps assume that you have an environment with Release 9.3.3 products. To use with Disclosure Management 11.1.2.1, perform these steps:

1. Install and configure a separate instance of Release 11.1.2.1 components including:
  - Shared Services
  - EPM Workspace
  - Provider Services
  - Financial Reporting
  - Disclosure Management
  - Smart View
  - Financial Management Client and ADM Driver components

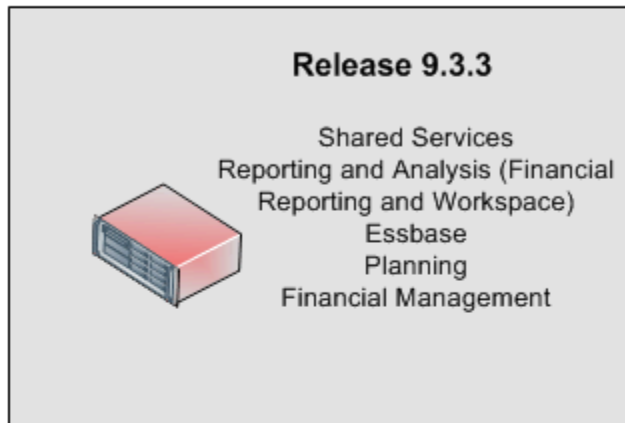
For detailed instructions on installing and configuring Release 11.1.2.1 products, see the *Oracle Hyperion Enterprise Performance Management System Release 11.1.2.1 Installation and Configuration Guide*.

2. Using 11.1.2.1 Financial Reporting or 11.1.2.1 Smart View, connect to 9.3.3 data sources.

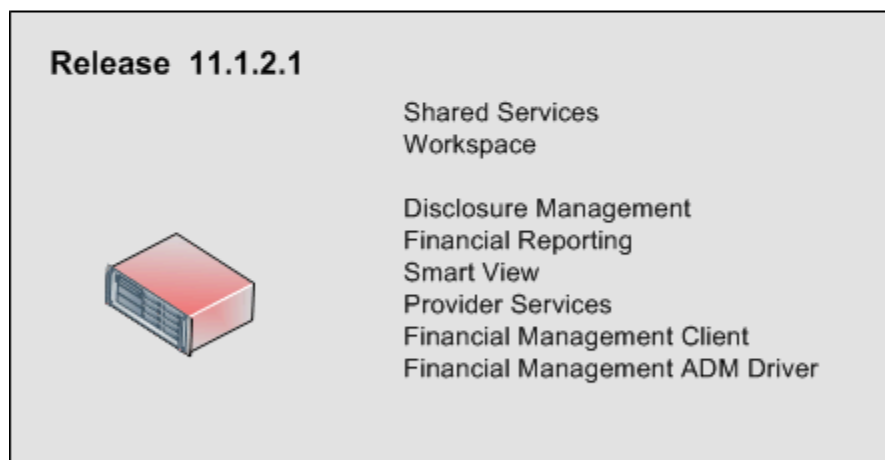


## Using Disclosure Management 11.1.2.1 With Release 9.3.3 (without Performance Management Architect)

### Existing Release 9.3.3 Products



### Install Separate Instance of Release 11.1.2.1 Products



### Perform Additional Steps

Connect to 9.3.3 Data Source Using  
Financial Reporting or Smart View

## Using Disclosure Management 11.1.2.1 With Release 9.3.3 With Performance Management Architect

If you already set up an environment using a multiple release scenarios of Release 9.3.3 products with Performance Management Architect, then you can use Disclosure Management 11.1.2.1 with your existing environment. This diagram shows how to set up your environment and assumes that you are already set up in a multiple release scenario using Performance Management Architect.

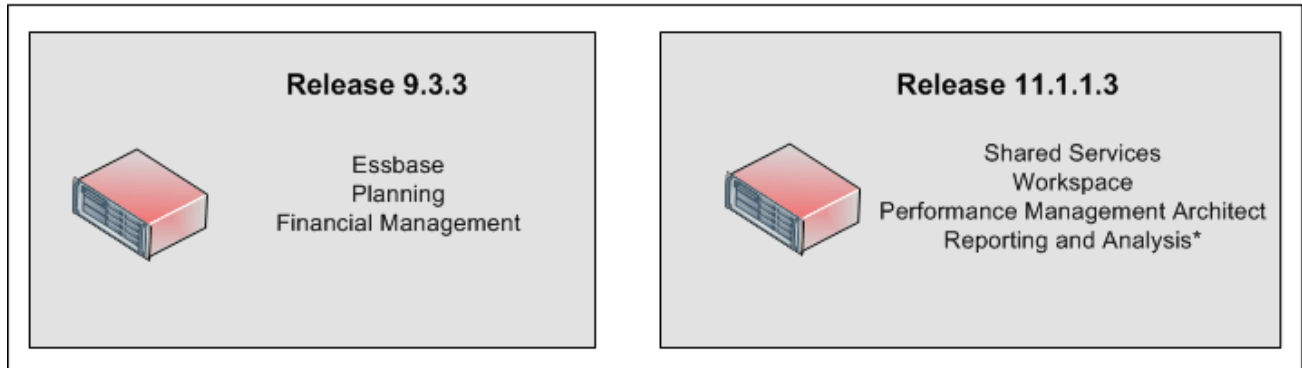
1. Install and configure a separate instance of Release 11.1.2.1 components including:
  - Shared Services
  - EPM Workspace
  - Oracle Essbase Provider Services
  - Financial Reporting
  - Oracle Hyperion Disclosure Management
  - Smart View
  - Financial Management Client and ADM Driver components

For detailed instructions on installing and configuring Release 11.1.2.1 products, see the *Oracle Hyperion Enterprise Performance Management System Release 11.1.2.1 Installation and Configuration Guide*.

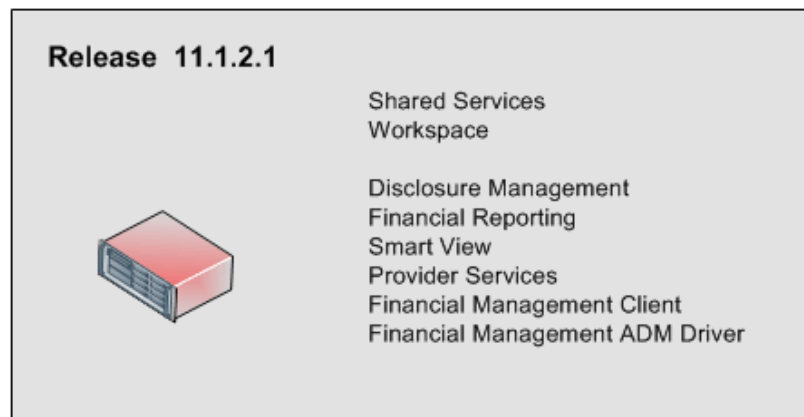
2. Using 11.1.2.1 Financial Reporting or 11.1.2.1 Smart View, connect to 9.3.3 data sources.

## Using Disclosure Management 11.1.2.1 With Release 9.3.3 (with Performance Management Architect)

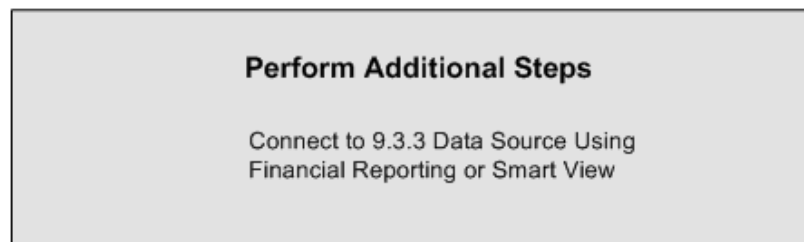
Step 1 – Release 9.3.3 Products and Release 11.1.1.3 Products Exist  
in a Multiple Release Environment



Step 2 – Install Separate Instance of Release 11.1.2.1 Products



Step 3



\* To use Disclosure Management, you need Financial Reporting 11.1.2.1. If you prefer using only one version of Financial Reporting, you can migrate reports from the older version to Financial Reporting 11.1.2.1.

# Using Financial Close Management Release 11.1.2.1 With Release 9.3.3 Products

If you want to use EPM System Release 11.1.2.1 Financial Close Management with Oracle Enterprise Performance Management System Release 9.3.3 products, use this section to understand how this multiple release environment should be set up in your environment. To use Financial Close Management Release 11.1.2.1 with Release 9.3.3 products, you need to set up separate instances for each of these releases. The high-level steps to perform are dependent on whether you are using Performance Management Architect and these scenarios are described in this section.

Financial Close Management helps companies define, execute, and report on the interdependent activities of a financial close period.

In order to integrate 9.3.3 products with Financial Close Management 11.1.2.1, you need to perform additional steps involving an IntegrationTypes.xml file. The IntegrationTypes.XML file for Financial Management, Financial Reporting and FDM to use with Financial Close Management is provided for each product. The IntegrationTypes.XML file contains all of the Integration Types and definitions associated with the particular product, and is available for download from My Oracle Support.

## Scenario 1. Using Financial Close Management Release 11.1.2.1 with Release 9.3.3 Products Without Performance Management Architect

This section contains the high level steps and a diagram showing how to setup Financial Close Management Release 11.1.2.1 with Release 9.3.3 Products without Oracle Hyperion EPM Architect. The high level steps assume that you have an existing environment with Release 9.3.3 products:

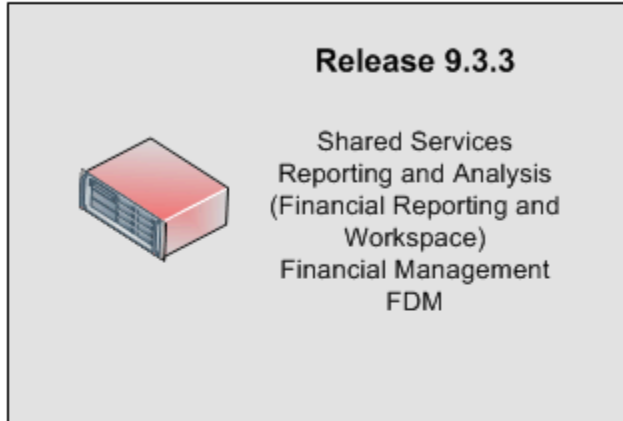
1. Install and configure a separate instance of Release 11.1.2.1 products including:
  - Shared Services
  - EPM Workspace
  - Financial Reporting
  - Financial Close Management
  - Financial Management Web Services component (Use Deploy to Application Server option in the 11.1.2.1 EPM System Configurator).

For detailed instructions on installing and configuring Release 11.1.2.1 products, see the *Oracle Hyperion Enterprise Performance Management System Release 11.1.2.1 Installation and Configuration Guide*.

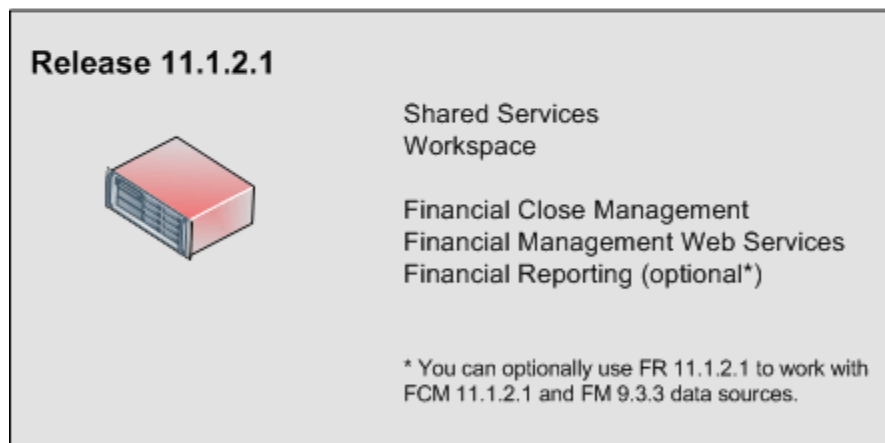
2. Perform additional setup steps for the following products:
  - Financial Management
  - Financial Reporting

- FDM

## Using Financial Close Management 11.1.2.1 With Release 9.3.3 (without Performance Management Architect)



Install Separate Instance of Release 11.1.2.1 Products



### Perform Additional Procedures

- Financial Management
- Reporting and Analysis
- FDM

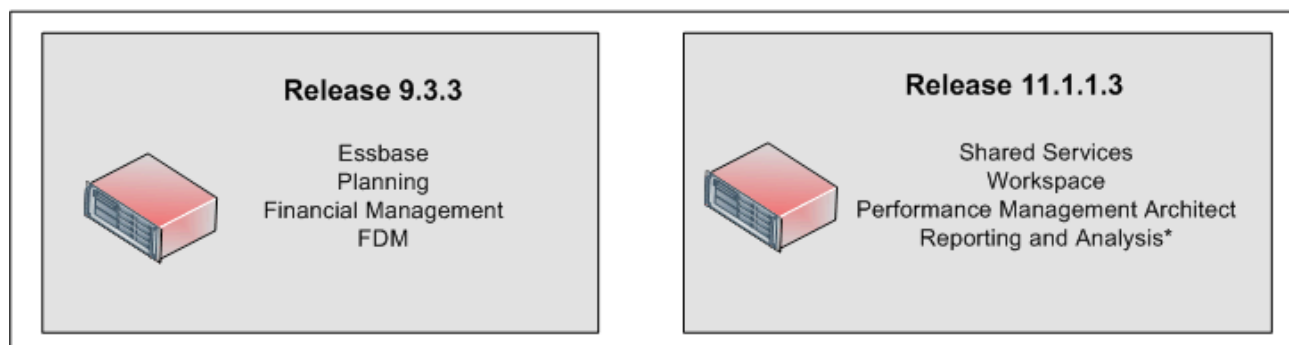
## Scenario 2. Using Financial Close Management 11.1.2.1 with Release 9.3.3 Products With Performance Management Architect

The high-level steps and diagram in this section assume that you have an existing multiple release environment with Release 9.3.3 and Release 11.1.1.3 products:

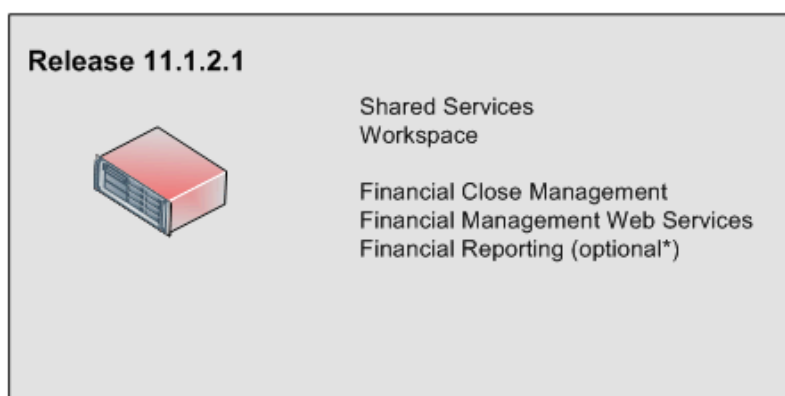
1. Install and configure a separate instance of Release 11.1.2.1 products including:
  - Oracle Hyperion Shared Services
  - Oracle Hyperion Enterprise Performance Management Workspace
  - Financial Reporting
  - Financial Close Management
  - Financial Management Web Services component (Use Deploy to Application Server option in the 11.1.2.1 EPM System Configurator).
2. Perform additional setup steps for the following products:
  - Financial Management
  - Financial Reporting
  - FDM

## Using Financial Close Management 11.1.2.1 With Release 9.3.3 (with Performance Management Architect)

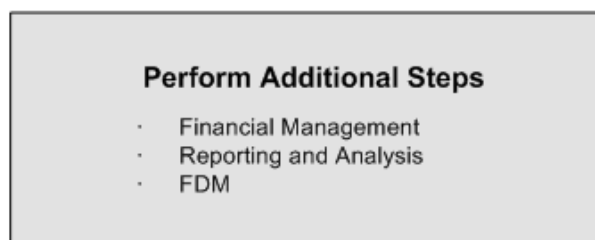
Step 1 – Release 9.3.3 Products and Release 11.1.1.3 Products Exist  
in a Multiple Release Environment



Step 2 – Install Separate Instance of Release 11.1.2.1 Products



Step 3 Perform Additional Steps



\* You can optionally use FR 11.1.2.1 to work with Financial Close Management 11.1.2.1 and FM 9.3.3 data sources. Or, you can use Financial Reporting 11.1.1.3 with FM data sources.

## Additional Procedures for Financial Management

Complete these procedures in order to allow Financial Management to integrate with Financial Close Management.

### 1. Financial Management

- a. In the 11.1.2.1 environment, run the HIT Registry update to add HFM ASP.NET Web Service and HFM Web Application nodes and then create the Registry Tree using the updated information.
- b. In the 11.1.2.1 environment, add proxy information to the Oracle HTTP Server configuration.
- c. In the 9.3.3 environment, check that `HFMApplicationService` is using ASP.NET version 2.0.50727.
- d. In the 11.1.2.1 environment, import the 9.3.3 version of the HFM Integration XML file, `FMIntegrationTypes.xml` into Financial Close Management 11.1.2.0.1.

### 2. Financial Reporting

Follow these steps to set up Financial Close Management to connect to Financial Reporting and run reports:

- a. Modify the 9.3.3 `FRIntegrationTypes.xml` file according to the instructions provided with the file that you downloaded from MyOracleSupport.
- b. Import the modified file into Financial Close Management following the instructions in the “Manage Integration Types” section of the *Oracle Hyperion Enterprise Performance Management Financial Close Management Administrator's Guide*.

**Note:** You can launch Financial Close Management Release 11.1.2.1 from Oracle Hyperion Workspace Release 9.3.3. For detailed instructions, see the *Oracle Hyperion Reporting and Analysis 9.3.3 Readme*.

### 3. FDM

- a. Modify the 9.3.3 `FDMIntegrationTypes.xml` file according to the instructions provided with the file that you downloaded from MyOracleSupport.
- b. Import the modified file into Financial Close Management following the instructions in the “Manage Integration Types” section of the *Oracle Hyperion Enterprise Performance Management Financial Close Management Administrator's Guide*.

## Update the `HFMHitRegistry.xml` File

In your 11.1.2.1 environment, use a text editor to update the `HFMHitRegistry.xml` file in order to add the Financial Management ASP.NET Web Service and Financial Management Web Application nodes. For most properties, you can use the defaults if Financial Management is installed with default configuration. However, the following properties must be updated correctly.



| Component                                              | Value                                                                                                                                                                          |
|--------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| FINANCIAL_MANAGEMENT_PRODUCT                           | <property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!--This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2.1 environment.             |
| LOGICAL_WEB_APP:FINANCIAL_MANAGEMENT_WEB_APP           | <property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!--This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2.1 environment.             |
|                                                        | <property name="host" value="webserver9_3_3.oracle.com"/><!--This value should be the 9.3.3 Web server machine's name.                                                         |
| FINANCIAL_MANAGEMENT_WEB_APP                           | <property name="serverName" value="webserver9_3_3.oracle.com"/><!--This value should be the 9.3.3 Web server machine's name.                                                   |
|                                                        | <property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!--This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2.1 environment.             |
|                                                        | <property name="InstallationDir" value="C:\Hyperion\FinancialManagement\Web\HFM"/><!--This should be the installation directory for the Financial Management 9.3.3 Web Server. |
|                                                        | <property name="FileTransferFolderPath" value="C:\Hyperion\FinancialManagement\Web\HFM\FileTransfer"/><!--Directory path to Financial Management FileTransfer folder.          |
| LOGICAL_WEB_APP:FINANCIAL_MANAGEMENT_ASPNET_WEBSERVICE | <property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!--This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2.1 environment.             |
|                                                        | <property name="host" value="webserver9_3_3.oracle.com"/><!--This value should be the 9.3.3 Web Server machine's name.                                                         |
| FINANCIAL_MANAGEMENT_ASPNET_WEBSERVICE                 | <property name="serverName" value="webserver9_3_3.oracle.com"/><!--This value should be the 9.3.3 Web Server machine's name.                                                   |
|                                                        | <property name="InstallationDir" value="C:\Hyperion\FinancialManagement\Web\HFMService"/><!--This is the installation directory for HFMAApplicationService.                    |
|                                                        | <property name="FileTransferFolderPath" value="C:\Hyperion\FinancialManagement\Web\HFM\FileTransfer"/><!--Directory path to Financial Management FileTransfer folder.          |
|                                                        | <property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!--This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2.1 environment.             |
| Default Component                                      | <property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1"/><!--This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2.1 environment.             |
|                                                        | <property name="Clustered" value="0"/><!--Cluster ID of the server where oracle-epm-fm-webservices reside.                                                                     |
|                                                        | <property name="host" value="webserver11_1_2.oracle.com"/><!--This value should be the 11.1.2.1 Web Server machine's name.                                                     |
| FINANCIAL_MANAGEMENT_WEBSERVICE                        | <property name="serverName" value="FMWebServices0"/><!--This is the server name in WebLogic Console for oracle-epm-fm-webservices.                                             |

| Component | Value                                                                                                                                                                                   |
|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|           | <pre>&lt;property name="instance_home" value="C:\Oracle\Middleware\user_projects\epmsystem1" /&gt;&lt;!--This path is defined as EPM_ORACLE_INSTANCE in the 11.1.2.1 environment.</pre> |

## Create Registry Tree With Updated HFMHitRegistry.xml File

This procedure is performed in your 11.1.2.1 environment in order to update the 11.1.2.1 Shared Services Registry so that it contains information about 9.3.3 Financial Management.

In your 11.1.2.1 environment, follow these steps to create the Financial Management Registry Tree:

1. Copy the updated version of HFMHitRegistry.xml to %EPM\_ORACLE\_INSTANCE%\bin folder. The default location should be C:\Oracle\Middleware\user\_projects\epmsystem1\bin.
2. Open a Command Prompt window (Select **Start**, then **Run**, type “cmd”, then press **Enter**).
3. Navigate to the %EPM\_ORACLE\_INSTANCE%\bin folder. You can use these steps:
  - a. If you installed EPM system on C Drive, type “C:” in the command prompt.
  - b. Type “cd %EPM\_ORACLE\_INSTANCE%\bin” or “cd C:\Oracle\Middleware\user\_projects\epmsystem1\bin”.
4. Create the Financial Management Registry tree using the following command:  
epmsys\_registry.bat createcomponenthierarchy HFMHitRegistryTree.xml.

---

**Caution!** The epmsys\_registry.bat createcomponenthierarchy HFMHitRegistryTree.xml can only be run once in the environment. Any subsequent corrections need to be done by following the instructions to modify the Shared Services Registry in the *Oracle Hyperion Enterprise Performance Management Release 11.1.2.1 Installation and Configuration Guide*.

---

5. **Optional:** Check epmsys\_registry.bat to see that the report lists System 9- 9.3.3.

## Making Corrections to Shared Services Registry

If you made an error when updating the registry, you can use the update property command to edit the Shared Services Registry. See the “Updating the Shared Services Registry” section in the *Oracle Hyperion Enterprise Performance Management Release 11.1.2.1 Installation and Configuration Guide*.

If any property under FINANCIAL\_MANAGEMENT\_WEB\_APP component needs to be updated, the corresponding property under LOGICAL\_WEB\_APP:FINANCIAL\_MANAGEMENT\_WEB\_APP component also needs to be updated and vice versa. These components must be kept in synch. The same guidelines apply to the following pairs of components:  
LOGICAL\_WEB\_APP:FINANCIAL\_MANAGEMENT\_ASPNET\_WEBSERVICE and  
FINANCIAL\_MANAGEMENT\_ASPNET\_WEBSERVICE; Default and  
FINANCIAL\_MANAGEMENT\_WEBSERVICE.

## Add Proxy Information to the Oracle HTTP Server Configuration

In your 11.1.2.1 environment, perform these changes on the machine running Foundation Service Oracle HTTP Server proxy server.

1. Add the following information to the end of the `httpd.conf` file located in  
`<ORACLE_MIDDLEWARE_HOME>\user_projects\epmsystem1\httpConfig\ohs  
\config\OHS\ohs_component`  
  
`ProxyPass /hfm http://<HFM_WEB_SERVER>:80/hfm`  
  
`ProxyPassReverse /hfm http://<HFM_WEB_SERVER>:80/hfm`

**Note:** The proxy virtual directory name must be "hfm" or the same name as the HFM IIS virtual directory for HFM Web.

2. Restart the Oracle HTTP Server proxy server.

## Verify the ASP.NET Version

In your 9.3.3 environment, ensure that the `HFMApplication Service` is using ASP.NET version 2.0.50727.

To verify the ASP.NET version:

1. Select **Start**, then **Run**, type `Inetmgr` and select **OK** to open Internet Information Services (IIS) Manager.
2. Under **Web Sites**, right-click on `HFMApplicationService` and select **Properties**.
3. Select the **ASP.NET** tab, and ensure that the ASP.NET version is 2.0.50727. If it is not currently selected, select it from the drop-down menu.

## Import 9.3.3 HFM Integration XML file, `FMIntegrationTypes.xml` into Financial Close Management

You need to import the 9.3.3 version of the Financial Management Integration xml file, `FMIntegrationTypes.xml`, into 11.1.2.0.1 Financial Close Management. The `FMIntegrationTypes.xml` file is provided with Financial Management 9.3.3 and is located in the following directory: `C:\Hyperion\FinancialManagement\Integration\FCM` or on `MyOracleSupport`.

To import the integration file (`FMIntegrationTypes.xml`), see the *Oracle Hyperion Financial Close Management Administrator's Guide*.

## Additional Procedures for Reporting and Analysis

Use this procedure to enable Financial Reporting 9.3.3 to work with Financial Close Management 11.1.2.1.

1. Modify the 9.3.3 `FRIntegrationTypes.xml` file according to the instructions provided with the patch that you downloaded from MyOracleSupport. This xml file contains all of the integration types and definitions associated with Financial Reporting.
2. Import the modified `FRIntegrationTypes.xml` file into Financial Close Management following the instructions in the “Manage Integration Types” section of the *Oracle Hyperion Enterprise Performance Management Financial Close Management Administrator's Guide*.
3. Optionally, if you want to access Financial Close Management 11.1.2.1 from Oracle Hyperion Workspace 9.3.3, follow the procedures in the *Oracle Hyperion Reporting and Analysis 9.3.3 Readme*.

## Additional Procedures for FDM

Financial Close Management release 11.1.2.1 includes the ability to launch three specific FDM pages: Import, Multiload, and Journals. The XML file included with this patch is used when integrating Hyperion Financial Data Quality Management (FDM) Release 9.3.3.0 with Financial Close Management Release 11.1.2.1.

To integrate FDM Release 9.3.3.0 with Financial Close Management Release 11.1.2.1, perform these steps:

1. Modify the 9.3.3 `FDMIntegrationTypes.xml` file according to the instructions provided with the patch that you downloaded from MyOracleSupport.
2. Import the modified `FDMIntegrationTypes.xml` file into Financial Close Management following the instructions in the “Manage Integration Types” section of the *Oracle Hyperion Enterprise Performance Management Financial Close Management Administrator's Guide*.

## Compatibility Limitations

Note the following compatibility issues when using Release 11.1.2.1 and Release 9.3.3 products in an environment:

- The version of FDM must match the version of Financial Management you are using.
- FDM 9.3.3 or 11.1.2.1 will support navigation from Oracle Hyperion Financial Close Management 11.1.2.1, however: FDM 9.3.3 cannot load a Financial Management 11.1.2.1 application nor can FDM 11.1.2.1 load a Oracle Hyperion Financial Management 9.3.3 application.
- FDM 11.1.2.1 supports drill through from Financial Reporting or Smart View 11.1.2.1 but Oracle Hyperion Financial Data Quality Management 9.3.3 does not support Oracle Hyperion Financial Reporting or Oracle Hyperion Smart View for Office at all.



# OPMN Service Failover for Essbase Server

## In This Appendix

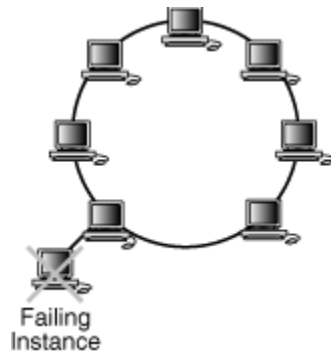
|                                     |     |
|-------------------------------------|-----|
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| opmn.xml Common Configuration ..... | 374 |

This appendix provides an overview of OPMN service failover concepts and lists the elements and attributes in the `opmn.xml` file that are *required* for configuring Essbase for failover. This file contains many other elements and attributes; see the *Oracle Process Manager and Notification Server Administrator's Guide*.

## Service Failover

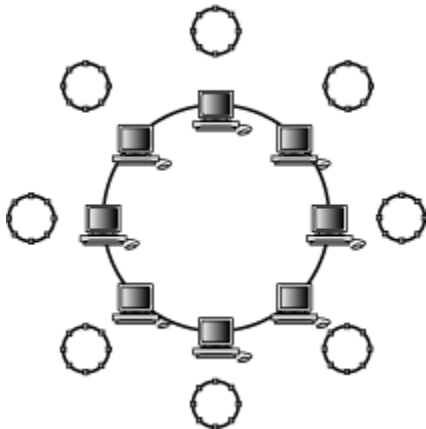
Service failover is a mechanism to specify a critical process that must be run somewhere in an Essbase cluster if service is disrupted on a processing server. This enables you to preferentially select which processes must be kept running. Any process-type `opmn.xml` file element may be configured as a service failover such that, once started, OPMN ensures that the configured number of processes for the service are running on Essbase instances somewhere in the cluster. You can configure which Essbase instances participate in the service failover on an instance-by-instance basis. You can configure each instance for preferential selection of running the process on available instances. Only one `process-set` may be defined for each `process-type` configured as a service failover. Only one process is run for each service failover instance.

In the following diagram, a service failover process has been started in a cluster where all instances are configured to participate in the service failover.



As shown in the diagram below, if the instance on which the service failover process is running goes down, such as for maintenance or an unprotected power outage or network failure, OPMN

selects another participating Essbase instance on which to run the process. All of the instances shown in the diagram are participating in the service failover.



## opmn.xml Common Configuration

### Subtopics

- [<port>](#)
- [<topology>](#)
- [<nodes>](#)
- [service-failover="num"](#)
- [service-weight="value"](#)
- [restart-on-death](#)
- [start/stop/restart timeout](#)

This section provides descriptions of elements and attributes in the `opmn.xml` file that are required to configure Oracle Essbase for failover. In the `opmn.xml` file, all elements are within the `<ias_component>` configuration element. (This entry represents the system component.)

### <port>

Parents: `notification-server`

Attributes: `local`, `remote`, `request`

The `port` element contains configuration information for ONS listener threads host and port bindings.

Example:

```
<ias-component id="<Essbase-Cluster-Name>">
 <process-type id="EssbaseAgent" module-id="ESS" service-failover="1" service-
weight="101">
 <environment>
 ...
 </environment>
 <port id="essbase-port-range" range="32768-33768"/>
 </process-type>
</ias-component>
```

```
</process-type>
</ias-component>
```

## <topology>

Parents: notification-server

Attributes: none

The `topology` element contains the configuration information for the ONS topology within a cluster.

Example:

```
<topology>
 <nodes list="adc2170731:6712,dadvmn0429:6712" />
</topology>
```

## <nodes>

Parents: topology

Attributes: list

The `nodes` element provides a list of specific addresses for OPMN servers in the same cluster as the local OPMN server. The local OPMN server is included in the list. Multiple `nodes` elements may be configured.

Example:

```
<topology>
 <nodes list="adc2170731:6712,dadvmn0429:6712" />
</topology>
```

## service-failover="num"

Valid Values: An integer value > 0

A `process-type` may be configured as a `service-failover` (if `num` is not zero), which represents a process that exists `num` times somewhere in the cluster when it is up. The implementation is limited such that only one process of this type runs on a single instance, and so the maximum number of processes for a specific `service-failover` in the cluster can never be more than the number of participating instances in the cluster. If the value of `num` is greater than the number of instances participating in this `service-failover` in the cluster and the `service-failover` is active (it has been started), then each participant added to the cluster automatically starts its `service-failover` process until the total number cluster wide is `num`.

A `service-failover` process can run on any instance participating in the service, which means each instance must have the service configured with the same `ias-component id`, `process-type id` and `process-set id`. To target the service itself, a request must specify both the `ias-component` and the `process-type` (it can also include the `process-set`).

A `service-failover` `process-type` can have only one `process-set`. Because the number of processes for a failover service is always 1, this `process-set` cannot specify `numprocs`, `minprocs`, or `maxprocs`.

A `service-failover` can be specified as a dependency (like any `managed-process`) or can specify dependencies. If specified as a dependency, the dependency check for a `service-failover` evaluates true as soon as one process of this type is active anywhere in the cluster, regardless of the configured value for `num`.

Example:

```
<ias-component id="<Essbase-Cluster-Name>">
 <process-type id="EssbaseAgent" module-id="ESS" service-failover="1" service-
weight="101">
 <environment>
 <variable id="EPM_ORACLE_HOME" value="<Oracle Home-Location>">
 </environment>
 ...
 </process-type>
</ias-component>
```

## service-weight="value"

Default: 100

Valid Values: An integer value > 0

The instances that run the actual `service-failover` processes are selected based upon the configured (or default) `service-weight` value. Instances with higher weights are selected over instances with lower weights. If a set of instances have the same weight for a service, then the configured number of instances are selected from the set to run the processes.

The `service-weight` attribute can only be specified if the `service-failover` attribute is set to a nonzero value.

Example:

```
<ias-component id="<Essbase-Cluster-Name>">
 <process-type id="EssbaseAgent" module-id="ESS" service-failover="1" service-
weight="101">
 <environment>
 <variable id="EPM_ORACLE_HOME" value="<Oracle Home-Location>">
 </environment>
 ...
 </process-type>
</ias-component>
```

## restart-on-death

Parents: `<process-set>`

Valid Values: true or false

If a managed process terminates unexpectedly, that is, is not stopped by a request, then OPMN does not automatically restart it.



Example:

```
<ias-component id="<Essbase-Cluster-Name>">
 <process-type id="EssbaseAgent" module-id="ESS" service-failover="1" service-
weight="101">
 <environment>
 ...
 </environment>
 <process-set id="AGENT" restart-on-death="true">
 <module-data>
 <category id="start-parameters">
 <data id="start-executable" value="$ESSBASEEXE" />
 <data id="agent-port" value="1423" />
 <data id="start-args" value="-b" />
 </category>
 ...
 </module-data>
 </process-type>
 </ias-component>
```

## start/stop/restart timeout

Parents: <process-set>

Valid Values: An integer > 0 and < 3600

A timeout value can be configured for each action.

Example:

```
<ias-component id="<Essbase-Cluster-Name>">
 <process-type id="EssbaseAgent" module-id="ESS" service-failover="1" service-
weight="101">
 <environment>
 ...
 </environment>
 <start timeout="600" retry="2" />
 <stop timeout="600"/>
 <restart timeout="600" retry="2" />
 </process-type>
</ias-component>
```





# Accessibility

---

## In This Appendix

|                                                                                   |     |
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| Using Keyboard Equivalents .....                                                  | 380 |

## Enabling Accessibility for EPM System Installer and EPM System Configurator

To use an accessible version of EPM System Installer and EPM System Configurator, launch EPM System Installer and EPM System Configurator in console mode.

➤ To use an accessible version of EPM System Installer:

### 1 Launch EPM System Installer in console mode:

- (Windows) From a Windows console, change to the root directory to which you extracted the EPM System Installer files and type `installTool.cmd -console`.
- (UNIX) Change to the root directory to which you extracted the EPM System Installer files and enter `./installTool.sh -console`.

**Tip:** If you are using JAWS screen reader software and want to interrupt reading of large text blocks (for example, the list of assemblies or Welcome text in EPM System Installer), press **Ctrl**. To re-read a prompt line, press **Insert + Up Arrow** or **Down Arrow**. To re-read an entire dialog box, press **Ctrl + 5**.

### 2 For each prompt, enter the number beside the selection you want. In some cases, you are also prompted to enter text.

**Tip:** You can press **Enter** to accept the default selection and move to the next prompt. The default selection is enclosed in square brackets at the end of the prompt, for example: Press 0 for Help, 1 for Next, 2 to Cancel or 3 to Redisplay [1]. In this case, pressing **Enter** selects option 1 for Next.

➤ To use an accessible version of EPM System Configurator:

### 1 Launch EPM System Configurator in console mode:

- (Windows) From a Windows console, change to `EPM_ORACLE_HOME/common/config/version_number`, and then enter `configtool.bat -console`.
- (UNIX) Change to `EPM_ORACLE_HOME/common/config/version_number` and then enter `./configtool.sh -console`

**2** For each prompt, enter the number beside the selection you want. In some cases, you are also prompted to enter text.

**Tip:** You can press **Enter** to accept the default selection and move to the next prompt. The default selection is enclosed in square brackets at the end of the prompt, for example: Press 0 for Help, 1 for Next, 2 to Cancel or 3 to Redisplay [1]. In this case, pressing **Enter** selects option 1 for Next.

## Using Keyboard Equivalents

When you are using EPM System Installer and EPM System Configurator in console mode, the command line prompts you to enter numbers to specify your choices.

Oracle Hyperion Enterprise Performance Management System Installer and Oracle Hyperion Enterprise Performance Management System Configurator have the following types of prompts:

- Choice prompt. For example: **Your choice:[3]**
- Navigation prompt. For example: **Press 0 for Help, 1 for Previous, 2 for Next, 3 to Cancel or 4 to Redisplay [2]**
- Product selection prompt. For example: **0:Select, 1:Deselect, 2:Expand, 3:Cancel**
- Yes or no prompt. For example: **0:Yes, 1:No [0]**

**Table 99**

| Shortcut | Description                                                                                                                                                                                                                                                                       |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0        | <ul style="list-style-type: none"> <li>• At a navigation prompt – <b>Help</b>. When prompted, you can enter 0 to get Help. Help displays in the Console window.</li> <li>• At a product selection prompt – <b>Select</b></li> <li>• At a yes or no prompt – <b>Yes</b></li> </ul> |
| 1        | <ul style="list-style-type: none"> <li>• At a navigation prompt – <b>Previous</b> (in most cases)</li> <li>• At a product selection prompt – <b>Deselect</b></li> <li>• At a yes or no prompt – <b>No</b></li> </ul>                                                              |
| 2        | <ul style="list-style-type: none"> <li>• At a navigation prompt – <b>Next</b> (in most cases)</li> <li>• At a product selection prompt – <b>Expand</b></li> </ul>                                                                                                                 |
| 3        | <ul style="list-style-type: none"> <li>• At a navigation prompt – <b>Cancel</b> (in most cases)</li> <li>• At a product selection prompt – <b>Cancel</b></li> </ul>                                                                                                               |
| 4        | <ul style="list-style-type: none"> <li>• At a navigation prompt – <b>Redisplay</b> (in most cases) or <b>Load, Save</b></li> </ul>                                                                                                                                                |

| Shortcut | Description                                                                                                                                                                                                                                                                                                      |
|----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enter    | <p>Accept the default selection and move to the next prompt.</p> <p>The default selection is enclosed in square brackets at the end of the prompt, for example: <code>Press 0 for Help, 1 for Next, 2 to Cancel or 3 to Redisplay [1]</code>. In this case, pressing <b>Enter</b> selects option 1 for Next.</p> |

**Note:** If you are using JAWS® Screen Reading Software, we recommend using the Internet Explorer browser.



---

# Glossary

---

**active-active high availability system** A system in which all the available members can service requests, and no member is idle. An active-active system generally provides more scalability options than an active-passive system. Contrast with active-passive high availability system.

**active-passive high availability system** A system with active members, which are always servicing requests, and passive members that are activated only when an active member fails. Contrast with active-active high availability system.

**application server cluster** A loosely joined group of application servers running simultaneously, working together for reliability and scalability, and appearing to users as one application server instance. See also vertical application cluster and horizontal application cluster.

**assemblies** Installation files for EPM System products or components.

**asymmetric topology** An Oracle Fusion Middleware Disaster Recovery configuration that is different across tiers on the production site and standby site. For example, an asymmetric topology can include a standby site with fewer hosts and instances than the production site.

**backup** A duplicate copy of an application instance.

**cluster** An array of servers or databases that behave as a single resource which share task loads and provide failover support; eliminates one server or database as a single point of failure in a system.

**cluster interconnect** A private link used by a hardware cluster for heartbeat information, to detect node failure.

**cluster services** Software that manages cluster member operations as a system. With cluster services, you can define a set of resources and services to monitor through a heartbeat mechanism between cluster members and to move these resources and services to a different cluster member as efficiently and transparently as possible.

**Disaster Recovery** The ability to safeguard against natural or unplanned outages at a production site by having a recovery strategy for applications and data to a geographically separate standby site.

**EPM Oracle home** A subdirectory of Middleware home containing the files required by EPM System products. The EPM Oracle home location is specified during installation with EPM System Installer.

**EPM Oracle instance** A directory containing active, dynamic components of EPM System products (components that can change during run-time). You define the EPM Oracle instance directory location during configuration with EPM System Configurator.

**external authentication** Logging on to Oracle EPM System products with user information stored outside the application. The user account is maintained by the EPM System, but password administration and user authentication are performed by an external service, using a corporate directory such as Oracle Internet Directory (OID) or Microsoft Active Directory (MSAD).

**failover** The ability to switch automatically to a redundant standby database, server, or network if the primary database, server, or network fails or is shut down. A system that is clustered for failover provides high availability and fault tolerance through server redundancy and fault-tolerant hardware, such as shared disks.

**hardware cluster** a collection of computers that provides a single view of network services (for example, an IP address) or application services (such as databases and Web servers) to clients of these services. Each node in a hardware cluster is a standalone server that runs its own processes. These processes can communicate with one another to form what looks like a single system that cooperatively provides applications, system resources, and data to users.

**high availability** A system attribute that enables an application to continue to provide services in the presence of failures. This is achieved through removal of single points of failure, with fault-tolerant hardware, as well as server clusters; if one server fails, processing requests are routed to another server.

**horizontal application server cluster** A cluster with application server instances on different machines.

**identity** A unique identification for a user or group in external authentication.

**installation assemblies** Product installation files that plug in to EPM System Installer.

**Java application server cluster** An active-active application server cluster of Java Virtual Machines (JVMs).

**lifecycle management** The process of migrating an application, a repository, or individual artifacts across product environments.

**load balancer** Hardware or software that directs the requests to individual application servers in a cluster and is the only point of entry into the system.

**load balancing** Distribution of requests across a group of servers, which helps to ensure optimal end user performance.

**locale** A computer setting that specifies a location's language, currency and date formatting, data sort order, and the character set encoding used on the computer. Essbase uses only the encoding portion. See also encoding, ESSLANG.

**logical Web application** An aliased reference used to identify the internal host name, port, and context of a Web application. In a clustered or high-availability environment, this is the alias name that establishes a single internal reference for the distributed components. In EPM System, a nonclustered logical Web application defaults to the physical host running the Web application.

**managed server** An application server process running in its own Java Virtual Machine (JVM).

**Middleware home** A directory that includes the Oracle WebLogic Server home and can also include the EPM Oracle home and other Oracle homes. A Middleware home can reside on a local file system or on a remote shared disk that is accessible through NFS.

**migration** The process of copying applications, artifacts, or users from one environment or computer to another; for example, from a testing environment to a production environment.

**migration log** A log file that captures all application migration actions and messages.

**migration snapshot** A snapshot of an application migration that is captured in the migration log.

**native authentication** The process of authenticating a user name and password from within the server or application.

**Oracle home** A directory containing the installed files required by a specific product, and residing within the directory structure of Middleware home. See also Middleware home.

**permission** A level of access granted to users and groups for managing data or other users and groups.

**provisioning** The process of granting users and groups specific access permissions to resources.

**proxy server** A server acting as an intermediary between workstation users and the Internet to ensure security.

**relational database** A type of database that stores data in related two-dimensional tables. Contrast with multidimensional database.

**repository** Storage location for metadata, formatting, and annotation information for views and queries.

**restore** An operation to reload data and structural information after a database has been damaged or destroyed, typically performed after shutting down and restarting the database.

**role** The means by which access permissions are granted to users and groups for resources.

**security agent** A Web access management provider (for example, Oracle Access Manager, Oracle Single Sign-On, or CA SiteMinder) that protects corporate Web resources.

**security platform** A framework enabling Oracle EPM System products to use external authentication and single sign-on.

**shared disks** See shared storage.



**Shared Services Registry** The part of the Shared Services repository that manages EPM System deployment information for most EPM System products, including installation directories, database settings, computer names, ports, servers, URLs, and dependent service data.

**shared storage** A set of disks containing data that must be available to all nodes of a failover cluster; also called shared disks.

**silent response files** Files providing data that an installation administrator would otherwise be required to provide. Response files enable EPM System Installer or EPM System Configurator to run without user intervention or input.

**single point of failure** Any component in a system that, if it fails, prevents users from accessing the normal functionality.

**single sign-on (SSO)** The ability to log on once and then access multiple applications without being prompted again for authentication.

**symmetric topology** An Oracle Fusion Middleware Disaster Recovery configuration that is identical across tiers on the production site and standby site. In a symmetric topology, the production site and standby site have the identical number of hosts, load balancers, instances, and applications. The same ports are used for both sites. The systems are configured identically and the applications access the same data.

**token** An encrypted identification of one valid user or group on an external authentication system.

**upgrade** The process of deploying a new software release and moving applications, data, and provisioning information from an earlier deployment to the new deployment.

**user directory** A centralized location for user and group information, also known as a repository or provider. Popular user directories include Oracle Internet Directory (OID), Microsoft Active Directory (MSAD), and Sun Java System Directory Server.

**vertical application server cluster** A cluster with multiple application server instances on the same machine.

**WebLogic Server home** A subdirectory of Middleware home containing installed files required by a WebLogic Server instance. WebLogic Server home is a peer of Oracle homes.



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