Oracle® Integrated Margin Planning, Fusion Edition

Installation Guide

RELEASE 11.1.2.1.00

ORACLE

ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

Integrated Margin Planning Installation Guide, 11.1.2.1.00

Authors: EPM Information Development Team

Contents

Documentation Accessibility 5

Chapter 1. System Requirements 7
Server Configuration 7
Client Configuration 8

Chapter 2. Installing Integrated Margin Planning 9
Installing Integrated Margin Planning on a Server 9
Installing Integrated Margin Planning in a Distributed Environment 13
Installing Integrated Margin Planning as an NT Service 15
Enabling Oracle HTTP Server as a Proxy 16

Chapter 3. Starting and Stopping Integrated Margin Planning 19
Starting Integrated Margin Planning 19
Stopping Integrated Margin Planning 20

Chapter 4. Using Essbaseas a Data Source in Integrated Margin Planning 21
Writing Report Scripts 22
Handling Ancestor Names in MDX Queries 22

Chapter 5. Configuring Server Properties 23
Server Settings 23
Database Settings 24
Security Settings 24
Mail Settings 25
Spreadsheet Settings 26
Logs and Directory Path Settings 26
Memory Settings 27
Client Settings 27

Chapter 6. Migrating from Integrated Margin Planning 11.1.2.0 to Integrated Margin Planning 11.1.2.1 29

Chapter 7. Migrating from Integrated Margin Planning 4.0.*x* to Integrated Margin Planning 11.1.2.1 31

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation

Screen readers may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, some screen readers may not always read a line of text that consists solely of a bracket or brace.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

Access to Oracle Support for Hearing-Impaired Customers

Oracle customers have access to electronic support through My Oracle Support or by calling Oracle Support at 1.800.223.1711. Hearing-impaired customers in the U.S. who wish to speak to an Oracle Support representative may use a telecommunications relay service (TRS). Information about the TRS is available at http://www.fcc.gov/cgb/consumerfacts/trs.html/, and a list of telephone numbers is available at http://www.fcc.gov/cgb/dro/trsphonebk.html. International hearing-impaired customers should use the TRS at +1.605.224.1837. An Oracle Support engineer will respond to technical issues according to the standard service request process.

1 System Requirements

In This Chapter

Server Configuration 7
Client Configuration 8

The minimum hardware and software prerequisites for installing Oracle Integrated Margin Planning, Fusion Edition are provided below.

Server Configuration

Table 1 Server Components and Descriptions

Server Component	Description
Hardware Configuration	A dedicated server with the following configuration: ● Pentium IV processor 1.6 GHz or faster ● 2 GB RAM or more ● 60 GB hard disk space or more **Note**: 80 GB hard disk space is recommended to accommodate growth and backup requirements.
EPM Foundation Service	
Operating System	Windows 2003 Server with the latest patches, Windows 2008 Server Release 1
Database Software	Oracle 10.2.0.4 or 11.1.0.7
Data Collection Component	Microsoft Excel 2003 SP 1 or later
Web Browser	Microsoft Internet Explorer 7 or 8 with the latest patches

Client Configuration

Table 2 Client Components and Descriptions

Client Component	Description
Operating System	One of the following: ● Windows 7 ● Windows XP SP 2
Microsoft Excel	One of the following: ● Microsoft Excel 2003 SP 1 or later ● Microsoft Excel 2007
Web Browser	Microsoft Internet Explorer 7 or 8 with the latest patches
Third Party Software	Adobe SVG Viewer

2 Installing Integrated Margin Planning

In This Chapter

Installing Integrated Margin Planning on a Server 9
Installing Integrated Margin Planning in a Distributed Environment 13
Installing Integrated Margin Planning as an NT Service 15
Enabling Oracle HTTP Server as a Proxy 16

Integrated Margin Planning is a set of predefined information that sits on top of the base Oracle Integrated Operational Planning, Fusion Edition product. Review the following topics:

Note: Before installing Integrated Margin Planning, ensure that your server meets the minimum hardware and software prerequisites. See Chapter 1, "System Requirements."

Installing Integrated Margin Planning on a Server

The following section describes the steps to install the provided Integrated Margin Planning model.

➤ To install Integrated Margin Planning model:

1 **Verify the following environment variables:**

Windows:

```
SET MW_ORACLE_HOME=C:\Oracle\Middleware
```

```
SET EPM_ORACLE_INSTANCE=C:\Oracle\Middleware\user_projects
\epmsystem1
```

where `C:\Oracle\Middleware` is the installation directory for Oracle Hyperion Enterprise Performance Management System

and `C:\Oracle\Middleware\user_projects\epmsystem1` is the path for the EPM System instance created during Oracle's Hyperion® Foundation Services installation.

Linux:

```
export MW_ORACLE_HOME=/home/epmuser/Oracle/Middleware
```

```
export EPM_ORACLE_INSTANCE=/home/epmuser/Oracle/Middleware/
user_projects/epmsystem1
```

where `/home/epmuser/Oracle/Middleware` is the installation directory for EPM System

and `/home/epmuser/Oracle/Middleware/user_projects/epmsystem1` is the path for the EPM System instance created during Foundation Services installation.

2 **Verify that the following servers are running:**

- Foundation Services
- Oracle's Hyperion® Shared Services
- Oracle database
- WebLogic Admin Server

3 **On the server, create a new installation directory.**

For example `c:\oracle_imp`, *`HOME`*`/oracle_imp`

4 **Copy the ZIP file containing Integrated Margin Planning installation files into the installation directory that you just created.**

5 **In the installation directory, unzip the installation files.**

6 **Create a new directory** *`INSTALL_ROOT`*`/custom`

where *`INSTALL_ROOT`* is the Integrated Margin Planning installation directory.

7 **Copy**

`INSTALL_ROOT``/samples/imp/*`

to

`INSTALL_ROOT``/custom`

8 **Use s**`etenv.bat` **for Windows, or** `setenv.sh` **for Linux, under** *`INSTALL_ROOT`*`/custom` **to modify the directories as appropriate for your environment. This command is used to set environment variables.**

a. Open a command prompt window, `cd` *`INSTALL_ROOT`*`/custom`.

b. Run `setenv.bat` for Windows, or `setenv.sh` for Linux to set the environment.

9 **Initialize the system by completing the steps to setup the properties file:**

a. Using a text editor, open:

`INSTALL_ROOT``\custom\config\site.properties`

where *`INSTALL_ROOT`* is the Integrated Margin Planning installation directory; for example, `c:\oracle_imp`.

b. In `site.properties`, add or modify the following parameter values to correspond with your database configuration:

Oracle

```
Database.Type=Oracle
Database.IOP_datasource.DriverClassName=oracle.jdbc.OracleDriver
Database.IOP_datasource.URL=jdbc:oracle:thin:@${Server.Hostname}:1521:orcl
Database.IOP_datasource.User=db_username
Database.IOP_datasource.Password=db_password
Database.IOP_datasource.Properties=
```

where

db_username is the name of the user who has database access

db_password is the password for the database user

Note: If you do not have a `site.properties` file, you must create one. You can copy an existing `site.properties` file from *INSTALL_ROOT*`\samples\imp\config`.

c. Set the host name:

`Server.Hostname=`*myhost.domain.com*

where *myhost.domain.com* is your machine name with a fully qualified domain name.

d. Set the maximum memory for Oracle WebLogic Server:

`Server.Weblogic.TargetServer.MaxMemory=`*xxxx*

The recommended setting for win32 is 1024m. The recommended setting for win64 is, 4096m.

e. Set the server port:

`Server.Weblogic.TargetServer.Port=`*xxxx*

where *xxxx* is an unused TCP port on the server. The default is 27080.

f. Set the EPM System domain name:

`Server.Weblogic.DomainName=`*EPMSystem*

where *EPMSystem* is the domain created during EPM Systeminstallation. The default domain name is `EPMSystem`.

g. Set the WebLogic Admin User name:

`Server.Weblogic.AdminUser=`*epm_admin*

where *epm_admin* is the user you assign during EPM System installation.

h. Set the WebLogic Admin User password:

`Server.Weblogic.AdminPassword=`*password*

where password is the password for the WebLogic Admin User.

i. Set the security key:

`Security.SecureKey=`*arbitrary_key*

where *arbitrary_key* is a word used as a key to encrypt all the passwords. The security key can be any combination of numbers, letters, and special characters.

Note: `IOP` is a keyword. Do not use it as the security key. You must also save the `site.properties` before encrypting the `db_password` and `Server.Weblogic.AdminPassword`.

j. Encrypt hard coded database and WebLogic Admin passwords:

i. In *INSTALL_ROOT*\bin, type encrypt password where password is your database password.

ii. Copy and paste the encrypted password from the encrypt tool to the *db_password* and Server.Weblogic.AdminPassword settings in your properties file.

k. Save the changes to *site.properties*.

10 **In the other command prompt, complete the following steps:**

a. In the Integrated Operational Planning installation directory, navigate to the custom folder.

b. Run setenv.bat to set the environment.

c. RUN *INSTALL_ROOT*/bin/runant to prepare the system for the sample models.

11 **Make sure WebLogic Admin Server is running, and the console shows similar messages as:**

```
<Oct 31, 2010 9:23:15 PM PDT> <Notice> <WebLogicServer> <BEA-000329> <Started
WebLogic Admin Server "AdminServer" for domain "EPMSystem" running in Production
Mode>
<Oct 31, 2010 9:23:16 PM PDT> <Notice> <WebLogicServer> <BEA-000365> <Server state
changed to RUNNING>
<Oct 31, 2010 9:23:16 PM PDT> <Notice> <WebLogicServer> <BEA-000360> <Server started
in RUNNING mode>
```

12 **Run the command createiopinstance to create a IOPServer_iopinstance1WebLogic server and deploying the OracleIOP.ear as well as Integrated Margin Planning shared libraries in the WebLogic Admin Server.**

Note: If asked, enter username and password to start createiopinstance.

13 **Create four users: dcooper, kreed, jstark, and tjones in Shared Services and provision them with Integrated Operational Planning User role.**

14 **Open a command prompt window and set environment variables and run the following command:**

```
cd INSTALL_ROOT\install\bin
isreset
```

15 **Start Integrated Margin Planning server. The command is found under**

```
EPM_ORACLE_INSTANCE/bin/startIOPServer_iopinstance1.bat(sh)
```

Wait for the console to show the similar messages as:

```
<Nov 9, 2010 9:01:29 PM PST> <Notice> <WebLogicServer> <BEA-000330> <Started
WebLogic Managed Server "IOPServer_iopinstance1" for domain "EPMSystem" running in
Production Mode>
<Nov 9, 2010 9:01:30 PM PST> <Notice> <WebLogicServer> <BEA-000365> <Server state
changed to RUNNING>
<Nov 9, 2010 9:01:30 PM PST> <Notice> <WebLogicServer> <BEA-000360> <Server started
in RUNNING mode>
```

Note: If asked, enter username and password to start Integrated Operational Planning server.

16 **Open another command prompt window and set environment variables.**

Then run the following command:

```
cd INSTALL_ROOT\custom\bin
bootstrap -u <IOP_ADMIN_USER> -p <IOP_ADMIN_PASSWORD>
```

where

IOP_ADMIN_USER is a Shared Services user with the Integrated Operational Planning Administrator provision and

IOP_ADMIN_PASSWORD is the password of *IOP_ADMIN_USER*

The Integrated Margin Planning server is now ready to accept requests from client computers. Log in to the application from your Web browser by connecting to the following URL:

`http://MYHOST.domain.com:PORT/interlace`

where *MYHOST* and *PORT* represent the host name and port number for the server.

Installing Integrated Margin Planning in a Distributed Environment

➤ To install the EPM System server and the Integrated Margin Planning server on different machines:

1. **Install EPM Foundation service on the EPM machine and configure.**
2. **Install EPM Foundation Service on the IMP machine (where Integrated Margin Planning will be installed) to the same directory path and name. Do *not* configure.**
3. **Copy *EPM_ORACLE_INSTANCE*\user_projects\epmsystem1 on the EPM System machine to the same directory on the Integrated Margin Planning machine.**
4. **Start WebLogic Server and the Foundation Services server on the EPM System machine by running following commands:**
   - *EPM_ORACLE_INSTANCE*\domains\EPMSystem\bin\startWebLogic.cmd

     This command starts the WebLogic Server.
   - *EPM_ORACLE_INSTANCE*\bin\startFoundationServices.bat

     This command starts the Oracle's Hyperion® Foundation Services Server.
5. **Install Integrated Margin Planning on the IMP machine and configure.**
   - Modify property settings as shown in step 9 on page 10.
   - Point to the correct WebLogic URL:.

     ```
     Server.Weblogic.AdminServer.URL=t3://
     foundation_server:weblogic_admin port
     ```
   - Point to the correct WebLogic domain name:

     ```
     Server.Weblogic.DomainName=EPMSystem
     ```

6 **In the command prompt window, change to the `\bin` directory in the Integrated Margin Planning installation directory, reset the Integrated Margin Planning database, and start the server.**

Enter the following commands:

- `cd` *`INSTALL_ROOT`*`\bin`

  where *`INSTALL_ROOT`* is the Integrated Margin Planning installation directory.

- `isreset`

  Enter a license key code when prompted.

- `createiopinstance`

7 **Copy *`EPM_ORACLE_INSTANCE`*`\iop\<`*`instancename`*`>` from the Integrated Margin Planning server to the administration server machine.**

This must be done before running Integrated Margin Planning.

8 **Copy the Integrated Margin Planning installation directory from the Integrated Margin Planning machine to the same directory path and name on the EPM machine.**

9 **Import users by running the following commands:**

- `cd` *`INSTALL_ROOT`*`\custom\bin`

  where *`INSTALL_ROOT`* is the Integrated Operational Planning installation directory.

- `bootstraplcmusers –u <`*`hss_admin_user`*`> –p <`*`hss_admin_password`*`>`

10 **Start the Integrated Operational Planning server by entering the following command:**

`EPM_ORACLE_INSTANCE``\bin\startIOPServer_iopinstance1.bat`

11 **After the server starts, open a second command prompt window and set the same system environment variables that you set earlier.**

If you created a batch command file containing the necessary command line, run the batch command in the second window.

12 **In the second command prompt window, navigate to the `custom\bin` directory in the Integrated Margin Planning installation directory, and run `bootstrap` to load data into the Integrated Margin Planning database.**

Enter the following commands;

- cd *`INSTALL_ROOT`*`\custom\bin`

  where *`INSTALL_ROOT`* is the Integrated Margin Planning installation directory.

- `bootstrap -u <imp_`*`admin_user`*`> -p <`*`imp_admin_password`*`>`

  where *`imp_admin_user`* is any Shared Services user with the IOP Administrator provision.

The Integrated Margin Planning server is now running in the first command prompt window. This window must remain open for the server to run. The server is ready to accept requests from client machines, and you can log in to the applications from your web browser by connecting to the following URL:

`http://myhost.domain.com:port/interlace`

where *myhost* and *port* represent the host name and port number for the server.

Installing Integrated Margin Planning as an NT Service

➤ To install Integrated Margin Planning as an NT Service:

1 **Open a DOS command prompt window and set system environment variables as follows:**

`SET MW_ORACLE_HOME=C:\Oracle\Middleware`

`SET EPM_ORACLE_INSTANCE=C:\Oracle\Middleware\user_projects\epmsystem1`

where `C:\Oracle\Middleware` is the installation directory for EPM System.

If you created a batch file containing this command, run the batch command to set the environment variables.

2 **In the same command prompt window, change to the `\bin\deploymentScripts\installServiceScripts` directory, and enter the following commands**

`cd EPM_ORACLE_INSTANCE\bin\deploymentScripts\installServiceScripts`

`installServiceIOPServer_iopinstance1.bat`

3 **Start/stop the server using one of the following methods:**

- `net start/stop service_name`
- Through services control

➤ To uninstall Integrated Margin Planning as an NT Service:

1 **Open a DOS command prompt window and set system environment variables as follows:**

`SET MW_ORACLE_HOME=C:\Oracle\Middleware`

`SET EPM_ORACLE_INSTANCE=C:\Oracle\Middleware\user_projects\epmsystem1`

where `C:\Oracle\Middleware` is the installation directory for EPM System.

If you created a batch file containing this command, run the batch command to set the environment variables.

2 **In the same command prompt window, change to the `\bin\deploymentScripts\installServiceScripts` directory, and enter the following commands:**

`cd EPM_ORACLE_INSTANCE\bin\deploymentScripts\installServiceScripts`

`uninstallServiceIOPServer_iopinstance1.bat`

Enabling Oracle HTTP Server as a Proxy

➤ To enable Oracle HTTP Server as a proxy to Integrated Margin Planning:

1 **Stop the Integrated Margin Planning server:**

Windows:

EPM_ORACLE_INSTANCE/bin/stopIOPServer_iopinstance1.bat

Linux:

EPM_ORACLE_INSTANCE/bin/stopIOPServer_iopinstance1.sh

2 **Add the following lines to** *EPM_ORACLE_INSTANCE*/httpConfig/ohs/config/OHS/ohs_component/mod_wl_ohs.conf:

```
RedirectMatch 301 ^/interlace$ /interlace/
<LocationMatch ^/interlace/>
SetHandler weblogic-handler
WeblogicCluster imp_server:port
</LocationMatch>
```

where *imp_server* is the fully qualified domain name of the Integrated Margin Planning server, and *port* is the value set in Server.Weblogic.TargetServer.Port=. The default value is 27080.

3 **To add static files to the Oracle HTTP Server:**

a. On the Oracle HTTP Server machine, unzip interlace_static.zip to

EPM_ORACLE_HOME/common/epmstatic/interlace

b. Update

EPM_ORACLE_INSTANCE/httpConfig/ohs/config/OHS/ohs_component/httpd.conf

to include the following line before the line that includes mod_wl_ohs.conf:

```
RewriteRule ^/interlace/static/(.*) /epmstatic/interlace/$1 [PT]
```

For example:

```
RewriteEngine On
RewriteRule ^/workspace/static/(.*) /epmstatic/wspace/$1 [PT]
RewriteRule ^/interlace/static/(.*) /epmstatic/interlace/$1 [PT]

# Include the configuration files needed for mod_weblogic
include "${ORACLE_INSTANCE}/config/${COMPONENT_TYPE}/${COMPONENT_NAME}/
mod_wl_ohs.conf"
```

where the value of RewriteRule matches the value of the property called Server.LogicalWebAddress.ContextRoot. See "Server Settings" on page 23.

In the above example, Server.LogicalWebAddress.ContextRoot is set to /workspace/ or /interlace/.

Note: The static files can be shared for all instances of Integrated Operational Planning in the domain.

4 **Restart Oracle HTTP Server either through the NT service or using this command:**

Windows:

EPM_ORACLE_INSTANCE/bin/stop|startOHS.bat

Linux:

EPM_ORACLE_INSTANCE/bin/stop|startOHS.sh

5 **Add the following line to** custom/config/site.properties**:**

Server.LogicalWebAddress.Port=19000

Set the port to the Oracle HTTP Server port used for all other EPM System products. The default value is 19000.

6 **Rerun** *INSTALL_ROOT*\bin\createiopinstance**.**

7 **Start the Integrated Margin Planning server.**

Windows:

EPM_ORACLE_INSTANCE/bin/startIOPServer_iopinstance1.bat

Linux:

EPM_ORACLE_INSTANCE/bin/startIOPServer_iopinstance1.sh

8 **Access the Integrated Margin Planning server through the Oracle HTTP Server proxy using the following URL:**

http://myhost.domain.com:*port*/interlace

where *port* refers to the setting in Server.LogicalWebAddress.Port.

3 Starting and Stopping Integrated Margin Planning

In This Chapter

Starting Integrated Margin Planning....19
Stopping Integrated Margin Planning....20

The procedures in this chapter assume that the Integrated Margin Planning server is currently running in a DOS command prompt window.

You may need to stop and restart the Integrated Margin Planning server in the following circumstances:

- To reload worksheet templates after making changes to a worksheet template XML file
- To reload XML definition files after restructuring dimensions

Note: Integrated Margin Planning comes with an unsigned license key, which allows you to start using the application. You will be prompted for an unsigned Active-X control when connected to the server.

Starting Integrated Margin Planning

➤ To start the Integrated Margin Planning server:

1 **Open a DOS command prompt window and set environment variables.**

Note: If a command prompt window is currently open with environment variables already set, skip to Step 2.

```
SET MW_ORACLE_HOME=C:\Oracle\Middleware
SET EPM_ORACLE_INSTANCE=C:\Oracle\Middleware\user_projects
\epmsystem1
```

where `C:\Oracle\Middleware` is the installation directory for EPM System.

If you created a batch file containing this command, run the batch command to set the environment variables.

2 **In the same command prompt window, enter the following command:**

EPM_ORACLE_INSTANCE\bin\startIOPServer_iopinstance1.bat

The Integrated Margin Planning server is now running in the command prompt window. This window must remain open for the server to run.

Stopping Integrated Margin Planning

➤ To stop the Integrated Margin Planning server:

1 **Open a second DOS command prompt window and set environment variables as follows:**

SET *MW_ORACLE_HOME*=C:\Oracle\Middleware

SET *EPM_ORACLE_INSTANCE*=C:\Oracle\Middleware\user_projects\epmsystem1

where C:\Oracle\Middleware is the installation directory for EPM System.

If you created a batch file containing this command, run the batch command to set the environment variables.

2 **In the same command prompt window, enter the following command:**

EPM_ORACLE_INSTANCE\bin\stopIOPServer_iopinstance1.bat

The Integrated Margin Planning server stops and the command prompt returns to the first command prompt window. After the server stops, you can close the second window.

4 Using Essbaseas a Data Source in Integrated Margin Planning

In This Chapter

Writing Report Scripts 22
Handling Ancestor Names in MDX Queries 22

➤ To deploy Integrated Margin Planning on Essbase:

1 **Connect to an Essbase instance by opening the Oracle Integrated Margin Planning Connection dialog box and entering the following information:**

- **Name**—Identifies the connection
- **Description**—Connection description
- **Host**—Machine name
- **Application Name**—Essbase application name
- **Database Name**—Name of the database for the Essbase application
- **Username**—Used for authentication
- **Password**—Used for authentication

2 **Open Integrated Margin Planning.**

3 **In the Administration Workbench, go to the Data Designer.**

4 **From the Object Browser View menu, select Data Sources.**

5 **Click Actions and select Add.**

A Data Source Wizard is displayed.

6 **On the Properties page, set the Type to Essbase and select an Essbase Connection.**

7 **On the Configuration page, select a Query Type (Report Script or MDX) and define the Query to send to Essbase.**

See "Writing Report Scripts" on page 22 and "Handling Ancestor Names in MDX Queries" on page 22.

Integrated Margin Planning internally *flattens* the results returned from Essbase and displays the results under **Data Source Preview**.

8 **On the Fields page, review data field details.**

Administrators can change data field names; however, the data type is determined internally can cannot be changed.

9 Click **Save.**

Writing Report Scripts

Essbase report scripts consist of formatting elements and member selection commands. When writing report scripts:

- The following snippet must appear at the beginning of the script:

  ```
  {SUPFEED}{BLOCKHEADERS}{TABDELIMIT}<SINGLECOLUMN
  {SUPCOMMAS}{SUPBRACKETS}{ROWREPEAT}{DECIMAL VARIABLE}
  {NOINDENTGEN}{SUPMISSINGROWS}
  ```

  `{SUPMISSINGROWS}` can be omitted if you need rows with missing values in the result set.

- Follow formatting control commands by member selection commands; for example:

  ```
  <Page (Product, Caffeinated, Ounces)
  <Column (Year, Measures)
  <ROW (Scenario, Market, Population)
  "Jan" "Feb" "Mar" <Child "100"
  <IDescendant "Population"
  <IDescendant "Market" "Actual" "Sales" "COGS"
  ```

- Use `<SYM` or `<ASYM` commands to control member selection along columns.
- The Page axis definition should have all "real" dimensions from Essbase, which are not part of the Column or Row definitions.

Handling Ancestor Names in MDX Queries

If the `Ancestor_Names` dimension property is part of the result set returned from MDX query execution in Essbase, Integrated Margin Planning automatically generates columns in addition to the one needed to populate the property itself.

One additional column, *`dimensionname`*`_Parent`, is populated with the member name of the parent of the current member. The parent column is generated to model row-source driven dependency dimensions.

5 Configuring Server Properties

In This Chapter

Server Settings 23
Database Settings 24
Security Settings 24
Mail Settings 25
Spreadsheet Settings 26
Logs and Directory Path Settings 26
Memory Settings 27
Client Settings 27

This chapter describes the properties you must set in Integrated Margin Planning:

These properties can be set in any Oracle Integrated Margin Planning, Fusion Edition properties file; however, Oracle recommends that you create a new properties file named after your hostname with a properties extension as in *machine_name*.properties. For example, for machine name IMP1, the properties file would be Imp1.properties. Place the properties file in the custom\config directory.

Server Settings

Table 3 Server Settings and Descriptions

Setting	Description
Server.Hostname=*myhost.domain.com*	*myhost.domain.com* is your machine name with a fully qualified domain name
Server.Weblogic.TargetServer.MaxMemory	Maximum memory setting for WebLogic Server. The default is 1024m.
Server.Weblogic.TargetServer.MinMemory	Minimum memory setting for WebLogic Server. The default is 512m.
Server.Weblogic.TargetServer.MaxPermSize	Maximum permissible size settings for Oracle WebLogic Server. The default is 192m.
Server.Weblogic.TargetServer.Port	HTTP port for the physical web application. The default is 27080.
Server.Weblogic.DomainName= EPMSystem	Oracle Hyperion Enterprise Performance Management System domain name. The default is EPMSystem
System.InstanceName=iopinstance1	System instance name. The default is iopinstance1.

Setting	Description
Server.LogicalWebAddress.Hostname	Hostname of the logical web application. The default is the value of the WebLogic host.
Server.LogicalWebAddress.Port	Port of the logical web application. The default is the value of the WebLogic port.
Server.LogicalWebAddress.SSLPort	SSL port of the logical web application. The default is the value of the WebLogic SSL port.
Server.LogicalWebAddress.ContextRoot	Context root for the logical web application. The default is the system context root.
Server.Weblogic.TargetServer.SSLPort	SSL port for the Physical Web application. The default is 27443.

Database Settings

Table 4 Database Server Settings and Descriptions

Setting	Description
Database.Type	Database type (either Oracle or SQLServer)
Database.IOP_datasource.DriverClassName	Database JDBC driver to use; `oracle.jdbc.OracleDriver` for Oracle or `weblogic.jdbc.sqlserver.SQLServerDriver` for SQLServer
Database.IOP_datasource.URL	Connection string for the Integrated Operational Planning server to connect to the database server
Database.IOP_datasource.User=*db_username*	*db_username* is the name of the user who has access to the database
Database.IOP_datasource.Password= *db_password*	*db_password* is the password of the user who has access to the database

Security Settings

Table 5 Security Settings and Descriptions

Setting	Description
Security.SecureKey=*arbitrary_key*	*arbitrary_key* is a word used as a key to encrypt all the passwords. It can be any combination of numbers, letters, and special characters.
Security.Keystore.File=*custom jks file with appropriate certification*	A key database file that contains both public keys and private keys. Public keys are stored as signer certificates, and private keys are stored in the personal certificates.
Security.Keystore.Password=*password*	Password for the key defined in Security.Keystore.File
Security.SSLSocketFactory.Enabled=true | false	Uses custom SSL sockets when running outbound SSL connections, which allows custom behavior and security checks. Defaults to true. If false, you must configure the java.net.security settings as appropriate with the underlying application server.

Setting	Description
Security.SSLSocketFactory.AllowUntrustedServers=true | false	Allows outbound SSL connections to servers using an unverified SSL certificate
Security.SSLSocketFactory.AllowUntrustedClients	Allows inbound SSL connections to servers using an unverified SSL certificate
Security.HostnameVerifier.Enabled=true | false	Enable/disable the hostname verifier for outbound https connections

Mail Settings

Table 6 Mail Settings and Descriptions

Setting	Description
Mail.Enabled	Enable/disable outgoing mail capability (true | false)
Mail.DefaultUser	Default account used for outgoing and incoming e-mails (both secure and nonsecure)
Mail.DefaultPassword	User's password
Mail.DefaultHost	Mail hostname
Mail.DefaultDomain	Domain name for the mail server
Mail.DefaultSubjectPrefix	Prefixes the subject of outgoing e-mail
Mail.IOP_mailsession.Transport.Protocol	Outgoing mail protocol (SMTP and SMTPS)
Mail.IOP_mailsession.Transport.Host=${Mail.DefaultHost}	Takes the value from Mail.DefaultHost, or you can override the setting with a different SMTP hostname
Mail.IOP_mailsession.Transport.User=${Mail.DefaultUser}	Takes the value from Mail.DefaultHost', or you can override
Mail.IOP_mailsession.Transport.Password=$ {Mail. DefaultPassword}	Takes the value from Mail.DefaultHost', or you can override
Mail.IOP_mailsession.Transport.Port	Port used for Transport protocol
Mail.IOP_mailsession.Properties= mail.smtp. connectiontimeout=5000;mail.smtp.auth=true | false;mail. smtp.ssl.checkserveridentity=true | false	Additional mail properties used for SMTP.(Use SMTPS if used over SSL)
Mail.IOP_mailsession.Store.Protocol	Incoming mail protocol (POP3, POP3S, IMAP, or IMAPS)
Mail.Reader.Enabled	Enables or disables the mail reader
Mail.Reader.Folder=INBOX	Reads value from INBOX, or sets to a folder name
Mail.IOP_mailsession.Store.User=${Mail.DefaultUser}	Takes the value from Mail.DefaultHost', or you can override
Mail.IOP_mailsession.Store.Password=${Mail. DefaultPassword}	Takes the value from Mail.DefaultHost', or you can override

Setting	Description
Mail.IOP_mailsession.Store.Host=${Mail.DefaultHost}	Takes the value from Mail.DefaultHost', or you can override
Mail.Reader.Interval=900	Interval for the server to check for incoming e-mail (in seconds)
Mail.IOP_mailsession.Properties= mail.imap.connectiontimeout=5000;mail.imap.ssl.checkserveridentity=true | false	Additional mail properties used for POP3/IMAP.(Use POP3S/IMAPS if used over SSL)

Spreadsheet Settings

Table 7 Spreadsheet Settings and Descriptions

Setting	Description
excel.contextmenu.editMembers.enabled	Enables or disables the editing in the Excel context menu
error.dir=${interlace.home}/errors	Logs the errors in an errors directory
spreadsheet.display.options.max.formula.length=120	Maximum characters to show a formula in a cell comment
spreadsheet.max.rows=10000	Maximum rows that a zoom or search can display
spreadsheet.max.columns=256	Maximum columns that a zoom or search can display
grid.max.exceptions=50	Maximum rows to show introduced exceptions on scenario detail and impact window
grid.max.exceptions.fixed=50	Maximum rows to show fixed exceptions on scenario detail and impact window
grid.max.data.changes=50	Maximum rows on data change displays

Logs and Directory Path Settings

Table 8 Logs and Directory Path Settings and Descriptions

Setting	Description
file.upload.maxSize=1048576	Maximum size for each uploaded file
loader.definition.directories= ${interlace.home}/custom/loader,${interlace.home}/interlace/loader,${interlace.home}/internal/interlace/loader,${interlace.home}/manufacturing/loader,${interlace.home}/marginplanning/loader	Loader directories
loader.schema.directory=${interlace.home}/etc/xsd/loader	Loader schema directory
loader.data.directory=${*interlace.home*}/custom/data	Directories where the load command finds the files for data

Setting	Description
loader.upload.data.directory=${*interlace.home*}/data	Directories where uploaded XLS files are stored
loader.upload.script.directories=${*interlace.home*}/custom/scripting,${*interlace.home*}/custom/workbook,${interlace.home}/custom/jacl,${*interlace.home*}/custom/scripts,${*interlace.home*}/interlace/workbook	Directories searched to locate the Java/JACL script file invoked by a VB script within an uploadable Excel report

Memory Settings

Table 9 Memory Settings and Descriptions

Setting	Description
Cache.BlockDataCache.Size=2000 Cache.BlockHeaderCache.Size=2000	Cache size for the number of blocks and headers. Make the header size and data the cache size the same. The block size depends on the number of measures and the number of time members. Given a set JVM size, assuming 30 measures and 100 time members: ● 1 GB, use size of 2000 ● 2 GB, use size of 4000 ● 4 GB, use size of 8000

Client Settings

Table 10 Client Settings and Descriptions

Setting	Description
user.profile.editable=false	Allow/disallow user to change own password (true | false)
SystemRS.show=false	Show/do not show system row sources in admin UI/data designer (true | false). This property can be set in `site/machineneame.properties`.
navigation.scriptExecution.enabled=true	Show/do not show script templates (true | false)

6 Migrating from Integrated Margin Planning 11.1.2.0 to Integrated Margin Planning 11.1.2.1

➤ To migrate data from Integrated Margin Planning 11.1.2.0 to Integrated Margin Planning 11.1.2.1:

1 **To create a custom and export folder in *INSTALL_ROOT_11.1.2.0*, on the 11.1.2.0 server, run:**

Windows:

INSTALL_ROOT_11.1.2.0\bin\preparemigration.bat

Linux:

INSTALL_ROOT_11.1.2.0/bin/preparemigration.sh

2 **Create a new directory *INSTALL_ROOT*/custom and copy the contents of *INSTALL_ROOT*/samples/imp/* to *INSTALL_ROOT*/custom.**

3 **To create the migration scripts in *INSTALL_ROOT*/custom/bin, use the sample migration scripts in *INSTALL_ROOT*/samples/sample/bin directory from 11.1.2.1 as a reference to update your scripts.**

4 **If importmodel_imp_export.isa and importresponse_imp_export.isa do not exist in *INSTALL_ROOT*/custom/bin:**

a. In Release 11.1.2.1, locate the following files from Release 11.1.2.1 model in *INSTALL_ROOT*/custom/bin/:

importmodel_export.isa
importresponse_export.isa.

b. Create a backup, and then rename the files to:

importmodel_imp_export.isa
importresponse_imp_export.isa

5 **Copy the contents of *INSTALL_ROOT*/export from your Release 11.1.2.0 directory to your 11.1.2.1 directory.**

6 **Copy the contents of *INSTALL_ROOT*/custom from your Release 11.1.2.0 directory to your 11.1.2.1 directory with the exception of the following files:**

INSTALL_ROOT/custom/bin
custom/build.xml
custom/model/acls.xml (Copy security_filters.xml)

7 **Copy the *_export.isa files from Release 11.1.2.0:**

INSTALL_ROOT/custom/bin

to Release 11.1.2.1:

INSTALL_ROOT/custom/bin

8 **Start WebLogic Admin Server.**

9 **Start Shared Services.**

10 **Manually add users from Release 11.1.2.0 to Shared Services 11.1.2.1.**

11 **Run** `createIOPinstance`, `isreset`, **and start the Integrated Operational Planning server.**

12 **Run** `migrate`:

Windows:

```
migrate.bat -u IOP_ADMIN_USER -p IOP_ADMIN_PASSWORD
```

Linux:

```
migrate.sh -u IOP_ADMIN_USER -p IOP_ADMIN_PASSWORD
```

where *IOP_ADMIN_USER* is a Shared Services user with the Integrated Operational Planning administrator provision and *IOP_ADMIN_PASSWORD* is the password of *IOP_ADMIN_USER*.

13 **Log on to the application from your Web browser by connecting to the following URL:**

http://*MYHOST*.domain.com:*PORT*/interlace

where *MYHOST* and *PORT* represent the host name and port number for the server.

7 Migrating from Integrated Margin Planning 4.0.*x* to Integrated Margin Planning 11.1.2.1

➤ To migrate data from Integrated Margin Planning 4.0.*x* to Integrated Margin Planning 11.1.2.1:

1 **To create a custom and export folder in** *INSTALL_ROOT_4.0.x*, **on the 4.0.***x* **server, run:**

Windows:

INSTALL_ROOT_4.0.x\bin\preparemigration.bat

Linux:

INSTALL_ROOT_4.0.x/bin/preparemigration.sh

2 **Create a new directory** *INSTALL_ROOT*/custom **and copy the contents of** *INSTALL_ROOT*/samples/imp/* **to** *INSTALL_ROOT*/custom.

3 **To create the migration scripts in** *INSTALL_ROOT*/custom/bin, **use the sample migration scripts in** *INSTALL_ROOT*/samples/sample/bin **directory from 11.1.2.1 as a reference to update your scripts.**

4 **If** importmodel_imp_export.isa **and** importresponse_imp_export.isa **do not exist in** *INSTALL_ROOT*/custom/bin **in Release 11.1.2.1, perform the following:**

a. Locate the following files from Release 11.1.2.1 model in *INSTALL_ROOT*/custom/bin/:

```
importmodel_export.isa
importresponse_export.isa
```

b. Create a backup, and then rename them to:

```
importmodel_imp_export.isa
importresponse_imp_export.isa
```

5 **Copy the contents of** *INSTALL_ROOT*/export **from your Release 4.0.***x* **directory to your 11.1.2.1 directory.**

6 **Copy the contents of** *INSTALL_ROOT*/custom **from your Release 4.0.***x* **directory to your 11.1.2.1 directory with the exception of the following files:**

```
INSTALL_ROOT/custom/bin
custom/build.xml
custom/model/acls.xml (Copy security_filters.xml)
```

7 **Copy the** *_export.isa **files from Release 4.0.x:**

INSTALL_ROOT/custom/bin

to Release 11.1.2.1:

INSTALL_ROOT/custom/bin

8 **To convert the exported Release 4.0.*x* XML files compatible with the 11.1.2.1 XML files for the migration, at the command prompt in *INSTALL_ROOT_11.1.2.1*, run:**

Windows:

`Run setenv.bat` and then `Run converter.bat`.

Linux:

`Run setenv.sh` and then `Run converter.sh`.

9 **Start WebLogic Admin Server.**

10 **Start Shared Services.**

11 **Manually add users from Release 4.0.*x* to Oracle's Hyperion® Shared Services 11.1.2.1.**

12 **Run `createIOPinstance`, `isreset`, and start the Integrated Operational Planning server.**

13 **Run `migrate`:**

Windows:

`migrate.bat -u` *IOP_ADMIN_USER* `-p` *IOP_ADMIN_PASSWORD*

Linux:

`migrate.sh -u` *IOP_ADMIN_USER* `-p` *IOP_ADMIN_PASSWORD*

where *IOP_ADMIN_USER* is a Shared Services user with the Oracle Integrated Operational Planning, Fusion Edition administrator provision and *IOP_ADMIN_PASSWORD* is the password of *IOP_ADMIN_USER*.

14 **Log on to the application from your Web browser by connecting to the following URL:**

`http://`*MYHOST*`.domain.com:`*PORT*`/interlace`

where *MYHOST* and *PORT* represent the host name and port number for the server.