Oracle® Integrated Margin Planning, Fusion Edition

Installation Guide

RELEASE 11.1.2.1.00
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The minimum hardware and software prerequisites for installing Oracle Integrated Margin Planning, Fusion Edition are provided below.

### Server Configuration

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

### Table 2  Client Components and Descriptions

<table>
<thead>
<tr>
<th>Client Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Operating System</strong></td>
<td>One of the following:</td>
</tr>
<tr>
<td></td>
<td>● Windows 7</td>
</tr>
<tr>
<td></td>
<td>● Windows XP SP 2</td>
</tr>
<tr>
<td><strong>Microsoft Excel</strong></td>
<td>One of the following:</td>
</tr>
<tr>
<td></td>
<td>● Microsoft Excel 2003 SP 1 or later</td>
</tr>
<tr>
<td></td>
<td>● Microsoft Excel 2007</td>
</tr>
<tr>
<td><strong>Web Browser</strong></td>
<td>Microsoft Internet Explorer 7 or 8 with the latest patches</td>
</tr>
<tr>
<td><strong>Third Party Software</strong></td>
<td>Adobe SVG Viewer</td>
</tr>
</tbody>
</table>
Installing Integrated Margin Planning

In This Chapter

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- 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 directory where Oracle Hyperion Enterprise Performance Management System is installed.
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 setenv.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.
   
      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=  

---

**Installing Integrated Margin Planning**
where

\textit{db\_username} is the name of the user who has database access

\textit{db\_password} is the password for the database user

\textbf{Note:} If you do not have a \texttt{site.properties} file, you must create one. You can copy an existing \texttt{site.properties} file from \texttt{INSTALL\_ROOT\samples\imp\config}.

c. Set the host name:

\begin{verbatim}
Server.Hostname=myhost.domain.com
\end{verbatim}

where \textit{myhost.domain.com} is your machine name with a fully qualified domain name.

d. Set the maximum memory for Oracle WebLogic Server:

\begin{verbatim}
Server.Weblogic.TargetServer.MaxMemory=xxxx
\end{verbatim}

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

e. Set the server port:

\begin{verbatim}
Server.Weblogic.TargetServer.Port=xxxx
\end{verbatim}

where \textit{xxxx} is an unused TCP port on the server. The default is 27080.

f. Set the EPM System domain name:

\begin{verbatim}
Server.Weblogic.DomainName=EPMSystem
\end{verbatim}

where \textit{EPMSystem} is the domain created during EPM System installation. The default domain name is \textit{EPMSystem}.

\textbf{Note:} \texttt{IOP} is a keyword. Do not use it as the security key. You must also save the \texttt{site.properties} before encrypting the \texttt{db\_password} and \texttt{Server.Weblogic.AdminPassword}.

g. Set the WebLogic Admin User name:

\begin{verbatim}
Server.Weblogic.AdminUser=epm_admin
\end{verbatim}

where \textit{epm_admin} is the user you assign during EPM System installation.

h. Set the WebLogic Admin User password:

\begin{verbatim}
Server.Weblogic.AdminPassword=password
\end{verbatim}

where \textit{password} is the password for the WebLogic Admin User.

\textbf{i.} Set the security key:

\begin{verbatim}
Security.SecureKey=arbitrary_key
\end{verbatim}

where \textit{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.

\textbf{Note:} \texttt{IOP} is a keyword. Do not use it as the security key. You must also save the \texttt{site.properties} before encrypting the \texttt{db\_password} and \texttt{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:


12 Run the command createiopinstance to create a IOPServer_iopinstance1 WebLogic 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\empsystem1 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:


   * Point to the correct WebLogic domain name:

     Server.Weblogic.DomainName=EPMSystem
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`

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

This must be done before running Integrated Margin Planning.

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

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>`

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

`EPM_ORACLE_INSTANCE\bin\startIOPServer_iopinstance1.bat`

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.

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:
   
   ```shell
   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
   
   ```shell
   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:
   
   ```shell
   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:
   
   ```shell
   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 \textit{imp_server} is the fully qualified domain name of the Integrated Margin Planning server, and \textit{port} is the value set in \texttt{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 \texttt{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 \texttt{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 \texttt{RewriteRule} matches the value of the property called \texttt{Server.LogicalWebAddress.ContextRoot}. See “Server Settings” on page 23.

   In the above example, \texttt{Server.LogicalWebAddress.ContextRoot} is set to \texttt{/workspace/} or \texttt{/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`. 
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:
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.
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 and cannot be changed.
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.
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>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server.Hostname= <code>myhost.domain.com</code></td>
<td><code>myhost.domain.com</code> is your machine name with a fully qualified domain name</td>
</tr>
<tr>
<td>Server.Weblogic.TargetServer.MaxMemory</td>
<td>Maximum memory setting for WebLogic Server. The default is 1024m.</td>
</tr>
<tr>
<td>Server.Weblogic.TargetServer.MinMemory</td>
<td>Minimum memory setting for WebLogic Server. The default is 512m.</td>
</tr>
<tr>
<td>Server.Weblogic.TargetServer.MaxPermSize</td>
<td>Maximum permissible size settings for Oracle WebLogic Server. The default is 192m.</td>
</tr>
<tr>
<td>Server.Weblogic.TargetServer.Port</td>
<td>HTTP port for the physical web application. The default is 27080.</td>
</tr>
<tr>
<td>Server.Weblogic.DomainName= <code>EPMSystem</code></td>
<td>Oracle Hyperion Enterprise Performance Management System domain name. The default is <code>EPMSystem</code></td>
</tr>
<tr>
<td>System.InstanceName= <code>iopinstance1</code></td>
<td>System instance name. The default is <code>iopinstance1</code>.</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Server.LogicalWebAddress.Hostname</td>
<td>Hostname of the logical web application. The default is the value of the WebLogic host.</td>
</tr>
<tr>
<td>Server.LogicalWebAddress.Port</td>
<td>Port of the logical web application. The default is the value of the WebLogic port.</td>
</tr>
<tr>
<td>Server.LogicalWebAddress.SSLPort</td>
<td>SSL port of the logical web application. The default is the value of the WebLogic SSL port.</td>
</tr>
<tr>
<td>Server.LogicalWebAddress.ContextRoot</td>
<td>Context root for the logical web application. The default is the system context root.</td>
</tr>
<tr>
<td>Server.Weblogic.TargetServer.SSLPort</td>
<td>SSL port for the Physical Web application. The default is 27443.</td>
</tr>
</tbody>
</table>

**Database Settings**

Table 4  Database Server Settings and Descriptions

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

**Security Settings**

Table 5  Security Settings and Descriptions

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Security.SecureKey=arbitrary_key</td>
<td>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.</td>
</tr>
<tr>
<td>Security.Keystore.File=custom jks file with appropriate certification</td>
<td>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.</td>
</tr>
<tr>
<td>Security.SSLSocketFactory.Enabled=true</td>
<td>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.</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Security.SSLSocketFactory.AllowUntrustedServers=true</td>
<td>Allows outbound SSL connections to servers using an unverified SSL certificate</td>
</tr>
<tr>
<td>false</td>
<td></td>
</tr>
<tr>
<td>Security.SSLSocketFactory.AllowUntrustedClients</td>
<td>Allows inbound SSL connections to servers using an unverified SSL certificate</td>
</tr>
<tr>
<td>Security.HostnameVerifier.Enabled=true</td>
<td>Enable/disable the hostname verifier for outbound https connections</td>
</tr>
<tr>
<td>false</td>
<td></td>
</tr>
</tbody>
</table>

### Mail Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Table 6 Mail Settings and Descriptions</td>
<td></td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>Mail.Enabled</td>
<td>Enable/disable outgoing mail capability (true</td>
</tr>
<tr>
<td>Mail.DefaultUser</td>
<td>Default account used for outgoing and incoming e-mails (both secure and nonsecure)</td>
</tr>
<tr>
<td>Mail.DefaultPassword</td>
<td>User’s password</td>
</tr>
<tr>
<td>Mail.DefaultHost</td>
<td>Mail hostname</td>
</tr>
<tr>
<td>Mail.DefaultDomain</td>
<td>Domain name for the mail server</td>
</tr>
<tr>
<td>Mail.DefaultSubjectPrefix</td>
<td>Prefixes the subject of outgoing e-mail</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Transport.Protocol</td>
<td>Outgoing mail protocol (SMTP and SMTPS)</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Transport.Host=${Mail.DefaultHost}</td>
<td>Takes the value from Mail.DefaultHost, or you can override a different SMTP hostname</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Transport.User=${Mail.DefaultUser}</td>
<td>Takes the value from Mail.DefaultUser', or you can override</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Transport.Password=${Mail.DefaultPassword}</td>
<td>Takes the value from Mail.DefaultUser', or you can override</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Transport.Port</td>
<td>Port used for Transport protocol</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Properties= mail.smtp.</td>
<td>Additional mail properties used for SMTP.(Use SMTPS if used over SSL)</td>
</tr>
<tr>
<td>connectiontimeout=5000;mail.smtp.auth=true</td>
<td></td>
</tr>
<tr>
<td>false;mail.</td>
<td></td>
</tr>
<tr>
<td>smtp.ssl.checkserveridentity=true</td>
<td></td>
</tr>
<tr>
<td>false</td>
<td></td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Store.Protocol</td>
<td>Incoming mail protocol (POP3, POP3S, IMAP, or IMAPS)</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Store.User=${Mail.DefaultUser}</td>
<td>Takes the value from Mail.DefaultHost', or you can override</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Store.Password=${Mail.DefaultPassword}</td>
<td>Takes the value from Mail.DefaultHost', or you can override</td>
</tr>
<tr>
<td>Mail.Reader.Enabled</td>
<td>Enables or disables the mail reader</td>
</tr>
<tr>
<td>Mail.Reader.Folder=INBOX</td>
<td>Reads value from INBOX, or sets to a folder name</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Store.User=${Mail.DefaultUser}</td>
<td>Takes the value from Mail.DefaultHost', or you can override</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Store.Password=${Mail.DefaultPassword}</td>
<td>Takes the value from Mail.DefaultHost', or you can override</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Store.Host=${Mail.DefaultHost}</td>
<td>Takes the value from Mail.DefaultHost, or you can override</td>
</tr>
<tr>
<td>Mail.Reader.Interval=900</td>
<td>Interval for the server to check for incoming e-mail (in seconds)</td>
</tr>
<tr>
<td>Mail.IOP_mailsession.Properties= mail.imap.</td>
<td>Additional mail properties used for POP3/IMAP. (Use POP3S/IMAPS if used over SSL)</td>
</tr>
<tr>
<td>connectiontimeout=5000;mail.imap.ssl.</td>
<td></td>
</tr>
<tr>
<td>checkserveridentity=true</td>
<td></td>
</tr>
<tr>
<td>checkserveridentity=false</td>
<td></td>
</tr>
</tbody>
</table>

## Spreadsheet Settings

### Table 7  Spreadsheet Settings and Descriptions

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

## Logs and Directory Path Settings

### Table 8  Logs and Directory Path Settings and Descriptions

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>file.upload.maxSize=1048576</td>
<td>Maximum size for each uploaded file</td>
</tr>
<tr>
<td>loader.definition.directories=</td>
<td>Loader directories</td>
</tr>
<tr>
<td>${interlace.home}/custom/loader,${interlace.</td>
<td></td>
</tr>
<tr>
<td>home}/interlace/loader,${interlace.home}/</td>
<td></td>
</tr>
<tr>
<td>internal/interlace/loader,${interlace.home}/</td>
<td></td>
</tr>
<tr>
<td>manufacturing/loader,${interlace.home}/</td>
<td></td>
</tr>
<tr>
<td>marginplanning/loader</td>
<td></td>
</tr>
<tr>
<td>loader.schema.directory=${interlace.home}/</td>
<td>Loader schema directory</td>
</tr>
<tr>
<td>etc/xsd/loader</td>
<td></td>
</tr>
<tr>
<td>loader.data.directory=${interlace.home}/</td>
<td>Directories where the load command finds the files for data</td>
</tr>
<tr>
<td>custom/data</td>
<td></td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>loader.upload.data.directory=${interlace.home}/data</td>
<td>Directories where uploaded XLS files are stored</td>
</tr>
<tr>
<td>loader.upload.scriptdirectories=${interlace.home}/custom/scripting,${interlace.home}/custom/workbook,${interlace.home}/custom/jacl,${interlace.home}/custom/scripts,${interlace.home}/interlace/workbook</td>
<td>Directories searched to locate the Java/JACL script file invoked by a VB script within an uploadable Excel report</td>
</tr>
</tbody>
</table>

### Memory Settings

#### Table 9  Memory Settings and Descriptions

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
</table>
| Cache.BlockDataCache.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 |
| Cache.BlockHeaderCache.Size=2000            |                                                                            |

### Client Settings

#### Table 10  Client Settings and Descriptions

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>user.profile.editable=false</td>
<td>Allow/disallow user to change own password (true</td>
</tr>
<tr>
<td>SystemRS.show=false</td>
<td>Show/do not show system row sources in admin UI/data designer (true</td>
</tr>
<tr>
<td>navigation.scriptExecution.enabled=true</td>
<td>Show/do not show script templates (true</td>
</tr>
</tbody>
</table>
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/acis.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.
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/acis.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.