Oracle® Enterprise Performance Management System

Standard Deployment Guide
Release 11.1.2.3
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About Standard Deployment

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

Standard Deployment Topology

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

You can combine more than one instance on a server if the server has the capacity.

You can vertically scale Oracle Essbase Server and all of the Java web applications in the standard deployment except Oracle Hyperion Financial Management.

**Deployment Directory Structure and Location Reference**

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

- Oracle Hyperion Reporting and Analysis Repository directory
- Exported or imported artifacts using Oracle Hyperion Enterprise Performance Management System Lifecycle Management
- Oracle Essbase Studio sample and customer data source text files
- Oracle Hyperion Strategic Finance data
- Oracle Hyperion Financial Data Quality Management, Enterprise Edition data

This document refers to the following installation and deployment locations:

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

- **EPM_ORACLE_HOME** refers to the installation directory containing the files required to support EPM System products. **EPM_ORACLE_HOME** resides within **MIDDLEWARE_HOME**. The default **EPM_ORACLE_HOME** is **MIDDLEWARE_HOME/EPMSystem11R1**; for example, Oracle/Middleware/EPMSystem11R1.
• *EPM_ORACLE_INSTANCE* denotes a location that is defined during the configuration process where some products deploy components. The default location is *EPM_ORACLE_INSTANCE* is *MIDDLEWARE_HOME/user_projects/empsystem1*; for example, Oracle/Middleware/user_projects/empsystem1.

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

## Deployment Approach

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

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Server Capacity Specifications

The “Standard Deployment Topology” on page 9 defines the following EPM Oracle instances for these components. Components can be installed on these servers, which have the Microsoft Windows 2008 R2 operating system installed. The server names indicated in this table are used throughout this document to identify specific servers or instances involved in the deployment. You can combine multiple EPM Oracle instances on a server if the server capacity supports it.

You can vertically scale Essbase Server and all of the Java web applications in the standard deployment except Financial Management.

Table 1  Minimum Server Specifications for Standard Deployment

<table>
<thead>
<tr>
<th>EPM System Instance</th>
<th>Server/Instance</th>
<th>Processor</th>
<th>Memory</th>
<th>Scales Horizontally?</th>
<th>Scales Vertically?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation</td>
<td>FNDHOST1</td>
<td>4 core</td>
<td>10 GB</td>
<td>Yes</td>
<td>Yes, Exceptions:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Oracle Hyperion EPM Architect Dimension Server</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Essbase Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Oracle Hyperion EPM Architect Dimension Server</td>
</tr>
<tr>
<td>Planning</td>
<td>PLANHOST1</td>
<td>4 core</td>
<td>6 GB</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Essbase</td>
<td>ESSHOST1</td>
<td>4 core</td>
<td>6 GB</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Financial Management</td>
<td>HFMHOST1</td>
<td>4 core</td>
<td>6 GB</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Profitability</td>
<td>HPCMHOST1</td>
<td>4 core</td>
<td>6 GB</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Strategic Finance</td>
<td>HSFHost1</td>
<td>4 core</td>
<td>6 GB</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>
### Server Requirements

#### Subtopics
- Windows Updates
- Operating System Firewall
- User Access Control
- Clock Synchronization
- Shared File System Requirements

#### Windows Updates

For each server in the deployment, if there are any pending Windows updates, apply Windows updates and reboot before installing and configuring.

#### Operating System Firewall

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

#### User Access Control

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

- To disable UAC:
  1. Select Start, then Control Panel, then User Accounts, then User Accounts, and then Change User Account Control settings.
  2. In User Account Control Settings, ensure that the slider is set to Never Notify.
Clock Synchronization

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

Shared File System Requirements

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

- Installation files downloaded from Oracle Software Delivery Cloud.
- Oracle HTTP Server configuration files
- Reporting and Analysis Repository data
- Artifacts for Lifecycle Management in Oracle Hyperion Shared Services
- Location for Essbase Studio sample and customer data source text files
- Data for Strategic Finance data
- Data directory for FDMEE applications

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

Subtopics

- Browser Settings
- Microsoft Office
- .NET Framework
- User Access Control

Browser Settings

Ensure that browser preferences and options are enabled:

- For Internet Explorer and Firefox:
  - Enable JavaScript.
  - Enable cookies. The preferred setting is to allow cookies to be stored on your computer. The minimum requirement is to allow per-session level cookies.
  - Allow pop-up windows.

- For Firefox version 17.x, install the Remote XUL Manager:
  2. In Firefox, select Tools, then Web Developer, and then Remote XUL Manager.
  3. Add your company’s domain name (for example, mycompany.com) to the list, and click Add.
  4. Restart Firefox.

- For Internet Explorer 7:
  1. Select Tools, then Internet Options, and click the Security tab.
  2. Click Custom level, and then find the Miscellaneous section.
  3. Ensure that the setting for “Include local directory path when uploading files to a server” is set to Enable.

- For Internet Explorer 9:
  1. Select Tools and then Compatibility View Settings.
  2. Make sure that the Oracle Hyperion Enterprise Performance Management Workspace URL is not enabled for Compatibility View. Also, uncheck all available options at the bottom of the pop-up window.

- For Internet Explorer (Oracle Hyperion Reporting and Analysis only), enable ActiveX.

- Add the URL for EPM Workspace to the trusted zone:
  1. Select Tools, then Internet Options, and click the Security tab.
  2. Select Trusted Sites, and then click Sites.
  3. Add the EPM Workspace URL to the list.
For Internet Explorer, customize security settings:
1. In Internet Explorer, select **Tools**, then **Internet Options**, then the **Security** tab.
2. Select the zone containing Oracle servers and click the **Custom level** button.
3. In the **Miscellaneous** section, enable **Access data sources across domains** and **Allow script-initiated windows without size or position constraints**.

**Microsoft Office**

Microsoft Office 2010 32-bit must be installed on client machines that host Oracle Hyperion Smart View for Office.

**.NET Framework**

.NET Framework 4.0 must be installed on client machines that host Smart View.

**User Access Control**

Disable User Access Control (UAC) on each client machine during installation.

► To disable UAC:

1. Select **Start**, then **Control Panel**, then **User Accounts**, then **User Accounts**, and then **Change User Account Control settings**.

2. In **User Account Control Settings**, ensure that the slider is set to **Never Notify**.

**Deployment User Requirements**

In this section you will:
● Create a user to install and configure EPM System components

● Identify a system administrator user name and password for use during configuration

Creating a User to Install and Configure EPM System Components

All EPM System components should be installed and configured from an administrator Windows user account (an account that does not belong to a specific user, and one that is not the Administrator) within the domain.

The deployment user account is referred to as the deployment user in this document and appears as deployment_user in screenshots. Use the deployment user for the following tasks:

● Install, configure, and patch EPM System

● Configure DCOM

● Run Windows services

Create this user account so that it satisfies the following requirements:

● The deployment user is a member of the Administrators group on the server.

● The following local security policies are assigned to the deployment user:
  ○ Act as part of the operating system
  ○ Bypass traverse checking
  ○ Log on as a batch job
  ○ Log on as a service

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

Identifying a System Administrator User Name and Password for Use During Configuration

You must also identify a system administrator user name and password. (You do not need to create a new user; simply identify an existing user to use.) This account, referred to as
epm_admin throughout this document, is used to administer WebLogic Server and Shared Services. Make a note of this user and password for use during configuration with Oracle Hyperion Enterprise Performance Management System Configurator.

**Environment Details**

Use this section to record the details for your environment.

**Table 2 Deployment Environment Checklist**

<table>
<thead>
<tr>
<th>Item</th>
<th>Value for Your Deployment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>User Checklist</strong></td>
<td></td>
</tr>
<tr>
<td>Deployment user name to log in to servers</td>
<td></td>
</tr>
<tr>
<td>Password of the deployment user</td>
<td></td>
</tr>
<tr>
<td>System administrator user name for logging in to WebLogic and Oracle Hyperion Shared Services.</td>
<td></td>
</tr>
<tr>
<td>Password of the System administrator user</td>
<td></td>
</tr>
<tr>
<td><strong>Shared Disk Checklist</strong></td>
<td></td>
</tr>
<tr>
<td>Location of shared disk</td>
<td></td>
</tr>
</tbody>
</table>
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- Database Accounts for EPM System Deployment .......................... 23
- Database Checklist .................................................................. 24

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

- OPEN_CURSORS - 5000
- PROCESSES - 1000
- SESSIONS - 2000
- SESSION_CACHED_CURSORS - 200

The sqlnet.ora file in the database server should have the following setting:

sqlnet.expire_time=10

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

- One account for EPM System Repository
- One account for an Oracle Hyperion Planning application
  - Each Planning application requires a separate database account. Before creating a Planning application, you must create a database account for it.
- One account for an Oracle Hyperion Profitability and Cost Management application

Database Roles and Privileges for EPM System Accounts

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

Other Settings

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

Database Checklist

Table 3 Database Checklist

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Database Host</th>
<th>Database Port</th>
<th>Service Name</th>
<th>User Account</th>
<th>Account Password</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPM System Repository</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Planning Application Database</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Profitability and Cost Management</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Database</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Firewall Setup

The following firewall ports must be opened for EPM System:

<table>
<thead>
<tr>
<th>Firewall</th>
<th>Ports to Open</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web-tier Firewall</td>
<td>443 (SSL Port)</td>
<td></td>
</tr>
<tr>
<td>Application-tier Firewall</td>
<td>19000 (Oracle HTTP Server Port)</td>
<td></td>
</tr>
<tr>
<td>Application-tier Firewall (Thick-client access)</td>
<td>19000 (Oracle HTTP Server Port)</td>
<td>Thick clients use these ports to access EPM System</td>
</tr>
<tr>
<td></td>
<td>1423 (Essbase Server/Agent Port)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>32768-33768 (Essbase Databases Ports)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5300 (Listen port) and 12080 (HTTP Listen port) (Essbase Studio)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>8205-8209 (Oracle Hyperion Financial Reporting Studio RMI Ports)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>7750 (Strategic Finance Server)</td>
<td></td>
</tr>
<tr>
<td>Database-tier Firewall</td>
<td>1521</td>
<td></td>
</tr>
</tbody>
</table>

1Default ports are listed.

Virtual Hosts Setup

Subtopics

- External Virtual Host
- Internal Virtual Host

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

**External Virtual Host**

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

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

**Internal Virtual Host**

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

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

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

**Setting Up the Load Balancer**

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

To configure the load balancer with virtual hosts created for this deployment, refer to the instructions provided by the vendor of your load balancer.
To download part numbers for standard deployment:

2. In Oracle Software Delivery Cloud, click Sign In/Register.
3. In Sign In, enter your Oracle Software Delivery Cloud user name and password, and then click Sign In.
4. In Terms and Restrictions, read and accept the Trial License and Export Restrictions agreements, and then click Continue.
5. In Media Pack Search, complete these steps:
   b. In Platform, select Microsoft Windows x64 (64-bit).
   c. Click Go.
   d. In Results, select Oracle Enterprise Performance Management (11.1.2.3.0) Media Pack for Microsoft Windows x64 (64-bit).
   e. Click Continue.
6. Download the part numbers listed in Table 5 into a location on the shared disk; for example, into \sharedhost\sharedlocation\downloads.

<table>
<thead>
<tr>
<th>Description</th>
<th>EPM System Part Numbers for Standard Deployment</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPM System Release 11.1.2.3.0 for Microsoft Windows (64-bit) Part 1</td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.3.0 for Microsoft Windows (64-bit) Part 2</td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.3.0 for Microsoft Windows (64-bit) Part 3</td>
<td></td>
</tr>
<tr>
<td>EPM System Release 11.1.2.3.0 for Microsoft Windows (64-bit) Part 4</td>
<td></td>
</tr>
</tbody>
</table>
Extracting EPM System Software

On the shared disk, unzip the downloaded EPM System part number archives into a directory (for example, epm_unzipped). Use a zip file extraction program that can handle long path names, such as 7-Zip. If you are prompted that any files or common components already exist, click Yes to overwrite the files.

After unzipping, the epm_unzipped directory is similar to this screenshot.
Installing and Configuring EPM System: New Deployments

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Prerequisites

Before you start, ensure that you have the following:

- Required servers and the deployment user that can access them
- Database connection information (host name, port, and service name) to use during the setup
- Database user accounts (user names and passwords) to use
- Access to shared disk

Installing and Configuring Foundation Services on FNDHOST1

To install and configure Foundation Services on FNDHOST1:

1. Log on to the Foundation Services host machine (FNDHOST1) as the deployment user, and define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads \epm_unzipped).
2. From the mapped network drive, launch installTool.cmd.
3. Follow the Oracle Hyperion Enterprise Performance Management System Installer wizard:
In Destination, if you want to install EPM System software in a location other than the default location, select that location.

In Installation Type, ensure that **New Installation** is selected.

Clear the selection (uncheck) from **Uncheck all**, and then in Product Selection, select the following components:

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

- Foundation Services
- Essbase—Essbase Administration Services Java Web Application
- Essbase—Provider Services Java Web Application
- Essbase—Essbase Studio Server
- Reporting and Analysis—Framework
- Reporting and Analysis—Financial Reporting
- Planning
- Disclosure Management
- Financial Close Management
- Financial Management—Financial Management ADM Driver (automatically selected)
- Financial Management—Financial Management Java Web Applications
- Strategic Finance—Strategic Finance Java Web Applications
- FDM Enterprise Edition
- Profitability and Cost Management

Clear (uncheck) **Essbase—Essbase Server**, which is automatically selected when you select Planning.
4 In Summary, click Finish after verifying that all components installed successfully.

5 Launch EPM System Configurator: From the Start menu, select All Programs, then Oracle EPM System, then EPM System Configurator (all instances).

6 In Oracle Instance, complete these steps, and then click Next.
   a. Optional: In Home directory for EPM Oracle instance, change the location of EPM Oracle Home directory.
   b. In EPM Oracle instance name, enter Foundation1.
On the Shared Services and Registry database configuration screen, enter the connection information for the Oracle Hyperion Shared Services Registry and the user name and password of the database account to use for accessing the database (recorded in Table 3, “Database Checklist”), and then click Next.

Shared Services Registry stores the configuration information for all the servers in the deployment so components can find each other.

In component configuration screen, perform the following tasks, and then click Next.

a. Uncheck the following components:
   - FDM Enterprise Edition
b. Expand Hyperion Foundation and select Configure Logical Address for Web Applications.

c. Expand Financial Management and select Configure DCOM.

In Configure Common Settings, complete these actions, and then click Next.

a. Select Run Windows Services as non-local system account.

b. In User name, enter the deployment user.

c. In Password, enter the deployment user password.

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

e. Optional: Enter SMTP mail server information.
10 In Configure Database, click Next to use the default values to leverage the Foundation Services database for all the products.

11 In Configure Reporting and Analysis Framework Services, complete these steps, and then click Next.
   a. In Repository Directory, enter the shared disk directory; for example: `\\SharedHost\SharedLocation\data\RM1`, where Oracle Hyperion Reporting and Analysis Framework repository data is to be stored. The folder name must be `\RM1`.
      Do not create this directory; EPM System Configurator creates it for you.
   b. Optional: In Port Range, change the port range that Oracle Hyperion Reporting and Analysis Framework repository should use.
12 In Deploy to Application Server - Specify WebLogic Domain Information, enter the required information, and then click Next.

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

a. In Administrator User, enter the user name of WebLogic Server domain administrator using the system administrator user name you identified.

b. In Administrator Password and Confirm Administrator Password, enter the password for WebLogic Server administrator using the system administrator password you identified.

13 In Deploy to Application Server: Oracle WebLogic, review the list of web applications that will be deployed to the WebLogic Server domain, and then click Next. The Java web applications listed on this screen are deployed to one managed server.
14 In Configure Dimension Server, click Next.

15 In Essbase Studio - Location For Sample and Customer Data Source Text Files, specify the shared disk directory for sample file installation or for text files that will be used as data sources; for example: \SharedHost\SharedLocation\data\Studio. EPM System Configurator creates this directory for you.
16 In Configure Reporting and Analysis Framework Agent Ports, click Next.

17 In Financial Reporting – Configure RMI ports, click Next.
18 In Configure Web Server, complete these steps, and then click Next.
   
a. In Web Server Type, select Oracle HTTP Server.

b. Optional: In Web Server Port, change the web server port number.

c. Click Advanced Options and specify the shared drive on which to configure Oracle HTTP Server (you must configure at the root of the shared drive), click OK, and then click Next.

19 In Update the logical address for the Web applications, complete these steps, and then click Next.
   
a. In Host, enter the name of the virtualhost (epminternal.mycompany.com) that you created for internal communication

b. Optional: In Port and SSL Port, change port numbers.
20 In Financial Management - Configure DCOM, complete these actions, and then click Next.

a. In Domain user, enter the deployment user.

b. In Password and Re-type Password, enter the deployment user password.

21 In Oracle Configuration Manager Registration, enter your information, and then click Next.

Oracle Configuration Manager notifies you when Oracle issues patches or security alerts. The password that you enter in this screen must match the password associated with your email address on My Oracle Support.
22 In Set Shared Services Admin User and Password, enter the user name and password for EPM System administrator using the system administrator user name and password that you identified, and then click Next.

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

25 Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Foundation1, then Foundation Services, and then Start EPM System.

26 Validate the installation by logging on to EPM Workspace by selecting Start, then All Programs, then Oracle EPM System, then Foundation1, then Workspace, and then Workspace URL, and then click Launch Application. Or you can access the following URL:

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

27 Have your network administrator configure the load balancer to route all requests addressed to epm.mycompany.com and epminternal.mycompany.com to the Oracle HTTP Server installations on the Foundation Services host machine (FNDHOST1).
Installing and Configuring Essbase Server on ESSHOST1

To install and configure Essbase on ESSHOST1:

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

2. Create a local directory (not on the shared drive) to be used as the Essbase location for data (ARBORPATH). This location should be outside of the MIDDLEWARE_HOME location, for example: c:\epm_data.

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

4. Follow the EPM System Installer wizard:
   - In Destination, specify the MIDDLEWARE_HOME directory location exactly as set while deploying Foundation Services on FNDHOST1.
   - In Installation Type, select New Installation.
   - In Product Selection, clear the selection (uncheck) from Uncheck All, and select the following component:
     - Essbase Server under Essbase
     Any required Foundation Services components are automatically selected.

5. In Summary, click Finish after verifying that all components installed successfully.

6. Launch EPM System Configurator: From the Start menu, select All Programs, then Oracle EPM System, then EPM System Configurator (all instances).

7. In Oracle Instance, complete these steps, and then click Next.
   - In Home directory for EPM Oracle instance, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on FNDHOST1).
b. In **EPM Oracle instance name**, enter Essbase1.

8 If you installed Essbase on the same server as Foundation Services, skip this step. On the Shared Services Registry database configuration screen, select **Connect to a Previously Configured Shared Services Database**, enter the connection information for the Shared Services Registry database and the user name and password of the database account to use for accessing the database (recorded in Table 3, “Database Checklist”), and then click **Next**.

The data that you enter must match the data that you entered while configuring the Shared Services Registry on the Foundation Services server (**FNDHOST1**).
9. In the component configuration screen, clear the selection (uncheck) from **Uncheck All**, expand **Essbase**, select **Essbase**, and then click **Next**.

10. In **Configure Essbase Server**, in **Full Path to Application Location (ARBORPATH)**, specify the directory that you created for data, for example: `c:\epm_data`, and then click **Next**.

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

13 On ESSHOST1, start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Essbase1, then Foundation Services, and then Start EPM System.

Installing and Configuring Planning on PLANHOST1

If you are configuring the Planning instance on the same server on which you configured the Foundation Services instance, you can skip the installation steps and go directly to the configuration steps, starting with step step 6.

To install and configure Planning on PLANHOST1:

1 Start the WebLogic Server Administration Server: On the Foundation Services host machine, start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSYSTEM, and then Start Admin Server for WebLogic Server.
2 Log on to the Planning host machine (*PLANHOST1*) as the deployment user, and define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

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

4 Follow the EPM System Installer wizard:
   - In Destination, specify the `MIDDLEWARE_HOME` directory location exactly as set while deploying Foundation Services on *FNDHOST1*.
   - In Installation Type, select **New Installation**.
   - In Product Selection, perform the following tasks:
     - Clear the selection (uncheck) from **Uncheck All**.
     - Select **Planning**.
     - Remove the selection from (uncheck) **Essbase** and from **Calculation Manager** (under Foundation Services) if it is selected.

5 In Summary, click **Finish** after verifying that all components installed successfully.

6 Launch EPM System Configurator: From the Start menu, select **All Programs**, then **Oracle EPM System**, then **EPM System Configurator (all instances)**.

7 In Oracle Instance, complete these steps, and then click **Next**.
   - In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on *FNDHOST1*).
   - In **EPM Oracle instance name**, enter Planning1.
8 If you installed Planning on the same server as Foundation Services, skip this step. On the Shared Services Registry database configuration screen, select Connect to a Previously Configured Shared Services Database, enter the connection information for the Shared Services Registry database and the user name and password of the database account to use for accessing the database (recorded in Table 3, “Database Checklist”), and then click Next.

The data that you enter must match the data that you entered while configuring the Shared Services Registry on the Foundation Services server (FNDHOST1).

9 In component configuration, click Uncheck All, select Planning, then expand Planning, clear the selection from Configure RMI Server, and then click Next.
10 In Configure Database, click Next to use the default values to leverage the Foundation Services database for Planning.

The Configure Database screen is needed only once per deployment, so if you are configuring an additional instance of Planning, skip this step.

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

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

15 Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Planning1, then Foundation Services, and then Start EPM System.
Installing and Configuring Financial Management on HFMHOST1

To install and configure Financial Management on HFMHOST1:

1. Start the WebLogic Server Administration Server: On the Foundation Services host machine, start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSystem, and then Start Admin Server for WebLogic Server.

2. Log on to the Financial Management host machine (HFMHOST1) as the deployment user, and define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

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

4. Follow the EPM System Installer wizard:
   - In Destination, specify the MIDDLEWARE_HOME directory location exactly as set while deploying Foundation Services on FNDHOST1.
   - In Installation Type, select New Installation.
   - In Product Selection, clear the selection (uncheck) from Uncheck All and select the following component:
     - Financial Management.

     When you select Financial Management, any required Foundation Services components are automatically selected.

     If you are configuring on the same server on which you installed Foundation Services, the Financial Management ADM driver and Financial Management Java web applications are already installed.
5 In Summary, click **Finish** after verifying that all components installed successfully.

6 Launch EPM System Configurator: From the Start menu, select **All Programs**, then **Oracle EPM System**, then **EPM System Configurator (all instances)**.

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

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

   b. In **EPM Oracle instance name**, enter HFM1.

8 If you installed Financial Management on the same server as Foundation Services, skip this step. On the Shared Services Registry database configuration screen, select **Connect to a Previously Configured Shared Services Database**, enter the connection information for the Shared Services Registry database and the user name and password of the database account to use for accessing the database (recorded in Table 3, “Database Checklist”), and then click **Next**.

   The data that you enter must match the data that you entered while configuring the Shared Services Registry on the Foundation Services server (*FNDHOST1*).
9 In component configuration screen, perform the following tasks, and then click Next.

- Remove the selection (uncheck) from Uncheck All
- Select Financial Management
- Clear the selection from Upgrade Applications from Earlier Release

10 In Configure Database, enter the database connection information for the Financial Management database, and the user name and password of the database account to use for accessing the database (recorded in Table 3 on page 24), and then click Next.
If you are configuring an additional instance of Financial Management, when you are prompted whether to drop and re-create the tables or reuse the existing database, select "Reuse the existing database."

11 In Deploy to Application Server – Specify WebLogic Domain Information, click Next to deploy the Financial Management web application to the WebLogic Server domain that you created on the Foundation Services host (fndhost1).

12 In Deploy to Application Server: Oracle WebLogic, click Next.
13 In Financial Management - Configure DCOM, complete these actions, and then click Next.
   a. In **Domain user**, enter the deployment user. The DCOM user must be the same on each machine that requires it.
   b. In **Password** and **Re-type Password**, enter the deployment user password.

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

Clusters are used to target different Financial Management tasks to different servers. A default cluster is created for you during configuration. The task of creating additional clusters is not part of this deployment process.

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

18 In Financial Management – Enable Smart View Provider, click **Next**.
19 In Financial Management – Enable Life Cycle Management, click Next.

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

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

Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then HFM1, then Foundation Services, and then Start EPM System.
Installing and Configuring Profitability and Cost Management on HPCMHOST1

If you are configuring the Profitability and Cost Management instance on the same server on which you configured the Foundation Services instance, you can skip the installation steps, and go directly to the configuration steps, starting with step 6.

To install and configure Profitability and Cost Management on HPCMHOST1:

1. Start the WebLogic Server Administration Server: On the Foundation Services host machine, start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPM System, and then Start Admin Server for WebLogic Server.

2. Log on to the Profitability and Cost Management host machine (HPCMHOST1) as the deployment user, and define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

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

4. Follow the EPM System Installer wizard:
   - In Destination, specify the MIDDLEWARE_HOME directory location exactly as set while deploying Foundation Services on FNDHOST1.
   - In Installation Type, select New Installation.
   - In Product Selection, clear the selection (uncheck) from Uncheck All and then select the following component:
     - From Profitability and Cost Management, select Profitability and Cost Management Java Web Application.

5. In Summary, click Finish after verifying that all components installed successfully.

6. Launch EPM System Configurator: From the Start menu, select All Programs, then Oracle EPM System, then EPM System Configurator (all instances).

7. In Oracle Instance, complete these steps, and then click Next.
a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on **FNDHOST1**).

b. In **EPM Oracle instance name**, enter HPCM1.

8 If you installed Profitability and Cost Management on the same server as Foundation Services, skip this step. On the Shared Services Registry database configuration screen, select **Connect to a Previously Configured Shared Services Database**, enter the connection information for the Shared Services Registry database and the user name and password of the database account to use for accessing the database (recorded in **Table 3, “Database Checklist”**), and then click **Next**.

The data that you enter must match the data that you entered while configuring the Shared Services Registry on the Foundation Services server (**FNDHOST1**).
9 In Component Configuration, clear the selection (uncheck) from Uncheck All, select Profitability and Cost Management, and then click Next.

10 In Configure Database, click Next to use the default values to leverage the Foundation Services database for Profitability and Cost Management.

The Configure Database screen appears once per deployment, so if you are configuring an additional instance of Profitability and Cost Management, skip this step.

11 In Deploy to Application Server - Specify WebLogic Domain Information, click Next to deploy Profitability and Cost Management to the WebLogic Server domain that you created on the Foundation Services host (FNDHOST1).
12 In Deploy to Application Server: Oracle WebLogic, click Next to deploy Profitability and Cost Management web application.

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

15 Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then HPCM1, then Foundation Services, and then Start EPM System.

Installing and Configuring Strategic Finance on HSFHOST1

➢ To install and configure Strategic Finance on HSFHOST1:

1 Start the WebLogic Server Administration Server: On the Foundation Services host machine, start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSystem, and then Start Admin Server for WebLogic Server.)

2 Log on to the Strategic Finance host machine (HSFHOST1) as the deployment user, and define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM
System software (for example, `\sharedhost\sharedlocation\downloads\epm_unzipped`).

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

4. Follow the EPM System Installer wizard:
   - In Destination, specify the `MIDDLEWARE_HOME` directory location exactly as set while deploying Foundation Services on `FNDHOST1`.
   - In Installation Type, select **New Installation**.
   - In Product Selection, clear the selection (uncheck) from **Uncheck All**, and then ensure that the following components are selected:
     - **Strategic Finance**.
       - If you are installing on the Foundation Services machine, the Java web application is already installed.
     - Retain the selection for **Financial Management ADM Driver** if it is selected.

5. In Summary, click **Finish** after verifying that all components installed successfully.

6. Launch EPM System Configurator: From the Start menu, select **All Programs**, then **Oracle EPM System**, then **EPM System Configurator (all instances)**.

7. In Oracle Instance, complete these steps, and then click **Next**.
   - **Home directory for EPM Oracle Instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on `FNDHOST1`).
   - **EPM Oracle instance name**, enter `HSF1`. 

---

![Image of EPM System Installer]

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8 If you installed Strategic Finance on the same server as Foundation Services, skip this step. On the Shared Services Registry database configuration screen, select **Connect to a Previously Configured Shared Services Database**, enter the connection information for the Shared Services Registry database and the user name and password of the database account to use for accessing the database (recorded in Table 3, "Database Checklist"), and then click **Next**.

The data that you enter must match the data that you entered while configuring the Shared Services Registry on the Foundation Services server (**FNDHOST1**).

9 In Component Configuration, complete these steps and then click **Next**.

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

b. Select **Strategic Finance**.
10 In Deploy to Application Server - Specify WebLogic Domain Information, click Next to deploy Strategic Finance to the WebLogic Server domain that you created on the Foundation Services host (FNDHOST1).

11 In Deploy to Application Server: Oracle WebLogic, click Next to deploy Strategic Finance web application.
12 In Strategic Finance - Configure Port and Data Folder, specify the shared disk directory location; for example: \sharedhost\sharedLocation\data\hsf, and then click Next.

13 In Strategic Finance Configure Web Services, click Next.
14 In Confirmation, review the summary of the configuration tasks that will be executed, and then click Next.

15 When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Finish.
Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then HSF1, then Foundation Services, and then Start EPM System.

Installing and Configuring FDMEE

If you are configuring the FDMEE Web application instance on the same server on which you configured the Foundation Services instance, you can skip the installation steps, and go directly to the configuration steps, starting with step 6.

➢ To install and configure FDMEE on FDMEEHOST1:

1. Start the WebLogic Server Administration Server: On the Foundation Services host machine, start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSystem, and then Start Admin Server for WebLogic Server.

2. Log on to the FDMEE host machine (FDMEEHOST1) as the deployment user, and define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).

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

4. Follow the EPM System Installer wizard:
   - In Destination, specify the MIDDLEWARE_HOME directory location exactly as set while deploying Foundation Services on FNDHOST1.
   - In Installation Type, select New Installation.
   - In Product Selection, clear the selection (uncheck) from Uncheck All and select the following component:
     - FDM Enterprise Edition
     - Retain the selection for Financial Management ADM Driver if it is selected.
5 In Summary, click Finish after verifying that all components installed successfully.

6 Launch EPM System Configurator: From the Start menu, select All Programs, then Oracle EPM System, then EPM System Configurator (all instances).

7 In Oracle Instance, complete these steps, and then click Next.
   a. In Home directory for EPM Oracle instance, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on FNDHOST1).
   b. In EPM Oracle instance name, enter FDMEE1.

8 If you installed FDMEE on the same server as Foundation Services, skip this step. On the Shared Services Registry database configuration screen, select Connect to a Previously Configured Shared Services Database, enter the connection information for the Shared Services Registry database and the user
name and password of the database account to use for accessing the database (recorded in Table 3, “Database Checklist”), and then click Next.

The data that you enter must match the data that you entered while configuring the Shared Services Registry on the Foundation Services server (FNDHOST1).

9. In component configuration, perform the following steps, and then click Next.
   a. Clear the selection (uncheck) from **Uncheck All**.
   b. Select **FDM Enterprise Edition**.
   c. Expand **Financial Management** and select **Configure DCOM**.
10 In Configure Database, click Next to use the default values to leverage the Foundation Services database for FDMEE.

![Configure Database Image]

If you are configuring an additional instance of FDMEE, when you are prompted whether to drop and re-create the tables or reuse the existing database, select **Reuse the existing database**.

11 In Deploy to Application Server - Specify WebLogic Domain Information, click Next to deploy FDMEE to the WebLogic Server domain that you created on the Foundation Services host (**FNDHOST1**).

![Deploy to Application Server Image]

12 In Deploy to Application Server: Oracle WebLogic, click Next to deploy FDMEE web application.
13 In Financial Management - Configure DCOM, complete these actions, and then click Next.
   a. In Domain user, enter the deployment user. The DCOM user must be the same on each machine that requires it.
   b. In Password and Re-type Password, enter the deployment user password.

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

16 Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then FDMEE1, then Foundation Services, and then Start EPM System.
7 Restarting EPM System Web Server and Validating the Deployment

In This Chapter

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- Refreshing EPM Workspace .......................................................... 78
- Validating the Deployment ............................................................ 78

Restarting the Web Server

Because you installed and configured Oracle HTTP Server on a shared drive, when you restart it, the web server is updated with information for all the Java web applications you deployed.

To restart Oracle HTTP Server:

1. On the Foundation Services host server (FNDHOST1), open Windows Services Manager.
2. Restart the Oracle Process Manager service for the Oracle HTTP Server (Oracle Process Manager ohsInstanceN). The number after ohsInstance is different for you.
Refreshing EPM Workspace

To refresh EPM Workspace:

1. Start a browser session.
2. Access EPM Workspace by accessing the following URL:
   
   http://FNDHOST1:9000/workspace/refresh
   
   In this URL, use port 9000, which is the managed server port where EPM Workspace is available, not the Oracle HTTP Server port.
3. At the Login screen, enter admin and the deployment password.

You should get a success message similar to the following screen shot.

Validating the Deployment

Subtopics

- Validating Essbase
- Validating Planning, Financial Management, Profitability and Cost Management, and FDMEE
- Validating Strategic Finance
- Validating Essbase Studio

Validating Essbase

To validate the Essbase installation:

1. If Essbase is not started, on ESSHOST1, start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Essbase1, then Foundation Services, and then Start EPM System.
2. Navigate to ARBORPATH\bin (for example, c:\epm_data\bin) and start MaxL by double-clicking startMaxl.bat.
3. At the MaxL prompt, enter the following command:
   
   LOGIN;
4. Enter the name of the system administrator that you defined during configuration, for example, admin.
5. Enter the password for the system administrator.
6. Enter the fully qualified host name for the server hosting Essbase Server (ESSHOST1).
   
   You should see “Logged in to Essbase”.
7. To quit MaxL, enter EXIT; at the prompt.
Validating Planning, Financial Management, Profitability and Cost Management, and FDMEE

To validate Planning, Financial Management, Profitability and Cost Management, and FDMEE deployment:

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

2. Log in using the system administrator user name and password that you identified.

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

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

4. Select Navigate, then Administer, and then Consolidation Administration.

5. Click OK if a compatibility setting warning is displayed.

   The Consolidation Administration application opens.
6 Select **Navigate**, then **Administer**, and then **Profitability Applications**.

7 Click **OK** if compatibility setting warning is displayed.

   The Profitability application opens.

8 In **EPM Workspace**, select **Navigate**, then **Administer**, and then **Data Management**.

9 Click **OK** if compatibility setting warning is displayed.

   The FDMEE application opens.
Validating Strategic Finance

- To validate Strategic Finance:

  Open a browser window and enter the following URL: http://hostname:19000/StrategicPlanning/SmartView.

  You should see HSF SmartView Provider in the window.

Validating Essbase Studio

- To validate Essbase Studio:

  1. On FNDHOST1, navigate to C:\Oracle\Middleware\user_projects\FOUNDATION1\bin, and double-click startEssbaseStudioCommandLineClient.bat.

  2. Enter the name for the server hosting Essbase Studio (FNDHOST1).

  3. Enter the name of the system administrator that you defined during configuration, for example, admin.

  4. Enter the password for the system administrator.

  You should see the cp1 prompt, which indicates that you are connected to the Essbase Studio Server.
Scale out as needed for your environment. When you scale out, you install and configure one or more additional instances of EPM System components either on the same host or on another host. If you are scaling vertically, skip the installation steps, and simply configure an additional instance on the same host.

## Scaling Out Foundation Services

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

If you are scaling out the Foundation Services instance on the same server on which you configured the first Foundation Services instance (vertically scaling), skip the installation steps and go directly to the configuration steps, starting with step 6 on page 85.

To scale out Foundation Services:

1. If you are configuring an additional instance of Foundation Services on a machine other than \textit{FNDHOST1}: Start the WebLogic Server Administration Server: On the Foundation Services host 1 machine (\textit{FNDHOST1}), start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSystem, and then \textit{Start Admin Server for WebLogic Server}.

2. Log on to the Foundation Services scale out machine (\textit{FNDHOST2}) as the deployment user, and define a network drive (for example, \texttt{Z:\}) that maps to the shared disk directory into which you extracted EPM...
System software (for example, `\sharedhost\sharedlocation\downloads\epm_unzipped`).

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

4 Follow the Oracle Hyperion Enterprise Performance Management System Installer wizard:
   - In Destination, specify the `MIDDLEWARE_HOME` directory location exactly as set while deploying Foundation Services on `FNDHOST1`.
   - In Installation Type, select **New Installation**.
   - In Product Selection, clear the selection (uncheck) from **Uncheck All** and then select the following components:
     - From **Foundation Services**
       - Foundation Components
       - Performance Management Architect Java Web Application
       - Performance Management Architect Data Synchronizer Java Web Application
       - Calculation Manager
     - From **Essbase**
       - Essbase Administration Services Web Application
       - Provider Services Web Application
     - From **Reporting and Analysis**
       - Framework
       - **Financial Reporting**. When you select **Financial Reporting**, EPM System Installer automatically selects **Financial Management ADM Driver**; retain this selection.
5. In Summary, click **Finish** after verifying that all components installed successfully.

6. Launch Oracle Hyperion Enterprise Performance Management System Configurator: From the Start menu, select **All Programs**, then **Oracle EPM System**, then **EPM System Configurator (all instances)**.

7. In Oracle Instance, complete these steps, and then click **Next**.
   a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services on **FNDHOST1**.
   b. In **EPM Oracle instance name**, enter **Foundation2**.
On the database configuration screen, complete these steps:

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

b. Enter database connection information for Shared Services Registry and the user name and password of the database account to use for accessing the database (recorded in Table 3, “Database Checklist”). This information must be identical to the information you entered while deploying Foundation Services on *FNDHOST1*.

c. Click **Next**.

If you are scaling out on the same machine as *FND1HOST*, you do not see the Configure Shared Services Registry screen.

The Shared Services Registry stores the configuration information for all the servers in the deployment so that components can find one another.
On the component configuration screen, complete these steps:

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

b. Select these components:
   - From Hyperion Foundation
     - Scale out compact server on this machine
     - Configure Web Server
   - From Reporting and Analysis
     - Configure Framework Services
   - From Financial Management
     - Configure DCOM

c. Click Next.
10 In Configure Reporting and Analysis Framework Services, in Repository Directory, enter the same shared disk directory location that you entered on FNDHOST1; for example: `\\SharedHost\SharedLocation\data\RMI`, and then click Next.

11 In Configure Reporting and Analysis Framework Agent Ports, click Next.
In Configure Web Server, complete these steps, and then click Next.

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

b. In Web Server Port, change the web server port number if you changed it on FndHost1.

c. Click Advanced Options and specify the location of the shared drive on which to install Oracle HTTP Server, click OK, and then click Next. The shared drive location is the same location that you specified on the first Foundation Services host machine (FNDHOST1).

In Financial Management - Configure DCOM, complete these actions, and then click Next.

a. In Domain user, enter the deployment user. The DCOM user must be the same on each machine that requires it.

b. In Password and Re-type Password, enter the deployment user password.
14 In Confirmation, review the summary of the configuration tasks that will be executed, and then click Next.

15 When the deployment process is complete, the Summary screen is displayed. Verify that all the tasks completed successfully, and then click Finish.
16 Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Foundation2, then Foundation Services, and then Start EPM System.

17 Reconfigure the load balancer so that it routes requests addressed to epm.mycompany.com and epminternal.mycompany.com to the Oracle HTTP Server on this Foundation Services host also.

Scaling out Essbase Server

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

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

➢ To scale out Essbase Server:

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

2 Complete step 2 on page 42 through step 13 on page 45 to set up an Essbase Server instance on the scale out machine (ESSHOST2). Use ESSBASE2 as the instance name on this machine.

In step 13 on page 45: On the scaleout machine (ESSHOST2), start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Essbase2, then Foundation Services, and then Start EPM System.

If you are scaling out the Essbase instance on the same server on which you configured the first Essbase instance (vertically scaling), skip the installation steps and go directly to the configuration steps, starting with step 6 on page 42. You will not be prompted for the Shared Services Registry database information during configuration.
3 Validate Oracle Essbase Server on ESSHOST2. See “Validating Essbase” on page 78.

## Scaling Out Planning

To scale out Planning, you install and configure one or more additional instances of Planning. Complete this procedure on each host machine; for example, PLANHOST2, onto which Planning is to be scaled out.

To scale out Planning:

1. If you are scaling Planning on the machine hosting Foundation Services, skip this step. Otherwise: Start the WebLogic Server Administration Server: On the Foundation Services host machine, start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSystem, and then Start Admin Server for WebLogic Server.

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

3. Complete step 3 on page 46 through step 15 on page 50 to set up an instance of Planning on the scale out machine (PLANHOST2).

   In the steps, use PLANHOST2 instead of PLANHOST1 as the host name and use PLANNING2 instead of PLANNING1 as the instance name on this machine.

   In step 15 on page 50: On the scaleout machine, start EPM System by selecting Start, then All Programs, then Oracle EPM System, then Planning2, then Foundation Services, and then Start EPM System.

   If you are scaling out the Planning instance on the same server on which you configured the first Oracle Hyperion Planning instance (vertically scaling), skip the installation steps and go directly to the configuration steps, starting with step 6 on page 46. You will not be prompted for the Shared Services Registry database information during configuration.

## Scaling Out Financial Management

To scale out Financial Management, you install and configure one or more additional instances of Financial Management. Complete this procedure on each host machine; for example, HFMHOST2, onto which Financial Management is to be scaled out. You cannot vertically scale Financial Management.

To scale out Financial Management:

1. If you are scaling Financial Management on the machine hosting Foundation Services, skip this step. Otherwise: Start the WebLogic Server Administration Server: On the Foundation Services host machine, start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSystem, and then Start Admin Server for WebLogic Server.

2. Verify that you are logged on to the Financial Management scale-out machine (HFMHOST2) using the deployment user.
3. Complete step 3 on page 51 through step 23 on page 59 to set up an instance of Financial Management server on the scale out machine (HFMHOST2).

   In the steps, use HFMHOST2 instead of HFMHOST1 as the host name and use HFM2 instead of HFM1 as the instance name on this machine.

   Specify the same DCOM user that you specified on HFMHOST1.

   If you are configuring an additional instance of Financial Management for scaleout purposes, during database configuration, when you are prompted whether to drop and re-create the tables or reuse the existing database, select Reuse the existing database.

   In step 23 on page 59: Start EPM System by selecting Start, then All Programs, then Oracle EPM System, then HFM2, then Foundation Services, and then Start EPM System.

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Scaling Out Profitability and Cost Management

Complete this procedure on each host machine; for example, HPCMHOST2, onto which Profitability and Cost Management is to be scaled out.

1. If you are scaling Profitability and Cost Management on the machine hosting Foundation Services, skip this step. Otherwise: Start the WebLogic Server Administration Server: On the Foundation Services host machine, start WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSystem, and then Start Admin Server for WebLogic Server.

2. Verify that you are logged on to the Profitability and Cost Management scale out machine (HPCMHOST2) using the deployment user.

3. Complete step 3 on page 60 through step 15 on page 64 to set up an instance of Profitability and Cost Management on the scale out machine (HPCMHOST2). Use HPCM2 as the instance name on this machine.

   In step 15 on page 64, start EPM System by selecting Start, then All Programs, then Oracle EPM System, then HPCM2, then Foundation Services, and then Start EPM System.

   If you are scaling out the Profitability and Cost Management instance on the same server on which you configured the first Oracle Hyperion Profitability and Cost Management instance (vertically scaling), skip the installation steps and go directly to the configuration steps, starting with step 6 on page 60. You will not be prompted for the Shared Services Registry database information during configuration.

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Scaling Out FDMEE

Complete this procedure on each host machine; for example, FDMEEHOST2, onto which FDMEE is to be scaled out.
To scale out FDMEE:

1. If you are scaling FDMEE on the machine hosting Foundation Services, skip this step. Otherwise: Start the WebLogic Server Administration Server. On the Foundation Services host machine, start Oracle WebLogic Server Administration Server by selecting Start, then All Programs, then Oracle WebLogic, then User Projects, then EPMSystem, and then Start Admin Server for WebLogic Server.

2. Verify that you are logged on to the FDMEE scale out machine (FDMEEHOST2) using the deployment user.

3. Complete step 3 on page 70 through step 16 on page 75 to set up an instance of FDMEE on the scale out machine (FDMEEHOST2). Use FDMEEHOST2 as the instance name on this machine.

   If you are configuring an additional instance of FDMEE for scaleout purposes, during database configuration, when you are prompted whether to drop and re-create the tables or reuse the existing database, select Reuse the existing database.

   In step 16 on page 75, start EPM System by selecting Start, then All Programs, then Oracle EPM System, then FDMEEHOST2, then Foundation Services, and then Start EPM System.

   If you are scaling out the FDMEE instance on the same server on which you configured the first Oracle Hyperion Financial Data Quality Management, Enterprise Edition instance (vertically scaling), skip the installation steps and go directly to the configuration steps, starting with step 6 on page 71. You will not be prompted for the Oracle Hyperion Shared Services Registry database information during configuration.

### Restarting the Web Server

To restart Oracle HTTP Server:

1. On the Foundation Services host machine (FNDHOST1), open Windows Services Manager.

2. Restart the Oracle Process Manager service for the Oracle HTTP Server (Oracle Process Manager ohsInstanceN). The number after ohsInstance is different for you.
3 Repeat step 1 - step 2 on each Foundation Services host machine in your deployment.

**Refreshing EPM Workspace**

If you scaled out Foundation Services, refresh EPM Workspace on each Foundation Services host machine in your deployment.

➤ To refresh EPM Workspace:

1 **Start a browser session.**

2 **Access EPM Workspace by accessing the following URL:**

   `http://FNDHOST1:9000/workspace/refresh`

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

3 **At the Login screen, enter admin and the deployment password.**

   You should get a success message similar to the following screen shot.

   ![Screen shot of Refreshing EPM Workspace](image)

4 Repeat these steps on each Foundation Services host machine in your deployment.
Generating a Deployment Report

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

To generate a deployment report:

1. Open a command prompt window on the Oracle Hyperion Foundation Services host machine (FNDHOST1).
2. Navigate to EPM_ORACLE_INSTANCE/bin; for example, C:\Oracle\Middleware\user_projects\FOUNDATION1\bin.
3. Execute the following command:
   
   epmsys_registry report deployment
   
   The report file (deployment_report_YYYYMMDD_HHmmSS.html) is stored in EPM_ORACLE_INSTANCE/diagnostics/reports; for example, C:\Oracle\Middleware\user_projects\FOUNDATION1\diagnostics\reports\deployment_report_YYYYMMDD_HHmmSS.html.
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Installing Smart View

Smart View must be installed on a machine that already has Microsoft Office 32-bit and .NET Framework 4.0 installed.

➢ To install Smart View:

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

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

3. Follow onscreen prompts to install Smart View.

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

Because Financial Reporting Studio requires access to the host servers in the application tier, it should be installed on a machine that has network access to these servers. In the reference topology (illustrated in “Standard Deployment Topology” on page 9), Financial Reporting Studio is installed on the client workstation (CLIENTHOST1) within the DMZ.

To install Financial Reporting Studio:

1. From a client machine that has network access to the host servers in the application tier, access EPM Workspace using the following URL:
   http://epm.mycompany.com:19000/workspace/index.jsp
2. In Oracle Hyperion Enterprise Performance Management Workspace, select Tools, then Install, and then Financial Reporting Studio to launch the installer.
4. To launch Oracle Hyperion Financial Reporting Studio, select Start, then All Programs, then Oracle, then Financial Reporting Studio, and then Financial Reporting Studio.
5. Log in using the FndHost1 server name and the system administrator user name and password that you identified.

Installing Administration Services Console

Because Oracle Essbase Administration Services Console requires access to the host servers in the application tier, it should be installed on a machine that has network access to these servers. In the reference topology (illustrated in “Standard Deployment Topology” on page 9), Administration Services Console is installed on the client workstation (CLIENTHOST1) within the DMZ.

To install Administration Services Console:

1. On a client machine that has network access to the host servers in the application tier, define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).
2. On the mapped network drive, navigate to EssbaseAdministrationServicesConsole directory; for example, to Z:\EssbaseAdministrationServicesConsole.
3. Double-click EASConsole.exe.
4. Follow onscreen prompts to install Administration Services Console.
5. On Summary, click Finish.
6. Start Oracle Essbase Administration Services Console by selecting Start, then All Programs, then Oracle EPM System, then Essbase, then Essbase Administration Services, and then Start Administration Services Console.
7. Log in using the FndHost1 server name and the system administrator user name and password that you identified.
Installing Financial Management Client

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

To install Financial Management Client:

1. On a client machine that has network access to the host servers in the application tier, define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).
2. On the mapped network drive, navigate to FinancialManagementClient directory.
3. Double-click HFMClientx64.exe if you have a 64-bit system or HFMClient.exe if you have a 32-bit system.
5. On Summary, click Finish.
6. Start Oracle Hyperion Financial Management Client by selecting Start, then All Programs, then Oracle EPM System, then Financial Management, and then Financial Management.

Installing Strategic Finance Client

Because Strategic Finance Client requires access to the host servers in the application tier, it should be installed on a machine that has network access to these servers. In the reference topology (illustrated in “Standard Deployment Topology” on page 9), Strategic Finance Client is installed on the client workstation (CLIENTHOST1) within the DMZ.

Install Strategic Finance on a machine that already has Microsoft Office 32-bit installed. To enable use of Smart View with Strategic Finance, install the Smart View client before installing the Strategic Finance client.

To install Strategic Finance Client:

1. On a client machine that has network access to the host servers in the application tier, define a network drive (for example, Z:\) that maps to the shared disk directory into which you extracted EPM System software (for example, \sharedhost\sharedlocation\downloads\epm_unzipped).
2. On the mapped network drive, navigate to StrategicFinanceClient directory.
3. Double-click HSFCClient.exe.
4. Follow onscreen prompts to install Oracle Hyperion Strategic Finance Client.
5. On Summary, click Finish.
6. From the Start menu, select All Programs, then Oracle EPM System, and then Strategic Finance.
Installing Essbase Studio Console

Because Essbase Studio Console requires access to the host servers in the application tier, it should be installed on a machine that has network access to these servers. In the reference topology (illustrated in “Standard Deployment Topology” on page 9), Essbase Studio Console is installed on the client workstation (CLIENTHOST1) within the DMZ.

To install Essbase Studio Console:

1. On a client machine that has network access to the host servers in the application tier, define a network drive (for example, Z: \) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, \sharedhost \sharedlocation\downloads\epm_unzipped).
2. On the mapped network drive, navigate to EssbaseStudio directory.
4. Follow onscreen prompts to install Essbase Studio Console.
5. On Summary, click Finish.
6. To start Oracle Essbase Studio Console, from the Start menu, select Oracle EPM System, then Essbase, then Essbase Studio, and then Essbase Studio Console.
7. Log in using the FndHost1 server name and the system administrator user name and password that you identified.