

**Oracle® Hyperion Enterprise Performance Management
Workspace**

Administration Guide

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EPM Workspace

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About EPM System and Enterprise Performance Management

Oracle Enterprise Performance Management System offers a comprehensive Enterprise Performance Management (EPM) system that consists of these products:

- Oracle Hyperion Enterprise Performance Management Workspace—Zero-footprint client that provides the user interface for viewing and interacting with content created using Oracle Hyperion Reporting and Analysis authoring studios, financial applications, and Oracle Business Intelligence products.
- Oracle Hyperion Reporting and Analysis Framework—Management reporting including query and analysis in one coordinated environment
- Oracle Hyperion Foundation Services—Eases installation and configuration, provides metadata management, and supports a common Microsoft Office interface
- Oracle Hyperion Application Builder for .NET—Coordinated planning, consolidation, and scorecard applications

About EPM Workspace

EPM Workspace is the Web user interface that is used to access all Oracle and non-Oracle content. Oracle content includes Oracle Hyperion Reporting and Analysis Framework and Oracle's financial applications. Oracle Essbase is part of a comprehensive EPM system that integrates this business intelligence platform with Oracle's financial applications, and Oracle Business Intelligence Enterprise Edition products.

EPM Workspace provides access to the following content:

- Oracle Hyperion Financial Reporting—Scheduled or on-demand highly formatted financial and operational reporting from almost any data source, including Oracle Hyperion

Planning, Oracle Hyperion Financial Management, Oracle Hyperion Profitability and Cost Management, Oracle BI Answers, Oracle BI Dashboards, Oracle BI Delivers, and Oracle Business Intelligence Publisher

- Oracle Hyperion Interactive Reporting—Ad hoc, relational query, self-service reporting and dashboards against any ODBC data source
- Oracle Hyperion Impact Management Services—Replaces Oracle Hyperion Interactive Reporting data models.
- Oracle Hyperion SQR Production Reporting—High volume, enterprise-wide production reporting
- Oracle Hyperion Web Analysis—Interactive ad hoc analysis, presentation, and reporting of multidimensional data
- Financial Management and Planning—Consolidation and planning application tasks
- Profitability and Cost Management—Managing cost and revenue allocations that are necessary to compute profitability for a business segment
- Oracle Hyperion Financial Data Quality Management, Enterprise Edition—Module of Oracle Hyperion Financial Data Quality Management that enables you to integrate metadata and data from an Enterprise Resource Planning (ERP) source system into an Enterprise Performance Management (EPM) target application.
- Oracle BI Answers—Provides true end user ad hoc capabilities in a pure Web architecture
- Oracle BI Dashboards—Oracle BI Dashboards provides intuitive, interactive access to information that is actionable and dynamically personalized based on the individual's role and identity
- Oracle BI Delivers—Business activity monitoring and alerting that can reach users through multiple channels such as email, dashboards, and mobile devices
- Oracle Business Intelligence Publisher (formerly known as XML Publisher)—Efficient; scalable reporting solution available for complex, distributed environments
- Disclosure Management—Toolset designed to help you create, edit, and submit instance documents for submission to a regulatory agency (for example a 10K or 10Q submitted to the SEC).
- Oracle Hyperion Financial Close Management—Helps companies define, execute, and report on the interdependent activities of a financial close period.

Note: *Studio* refers to Java or Windows components that have a rich authoring environment. EPM Workspace refers to the user thin client (UTC) or common user interface of the product.

Note: For information on system requirements, see the Oracle Enterprise Performance Management System Certification Matrix.

About EPM Workspace in Oracle General Ledger

EPM Workspace is the Web user interface that is used to access all Oracle content.

When used in Oracle General Ledger, EPM Workspace provides access to the following content:

- Financial Reporting—Scheduled or on-demand highly formatted financial and operational reporting from almost any data source, including Planning, Financial Management, and Oracle Hyperion Profitability and Cost Management
- Oracle Hyperion Calculation Manager—Create, validate, deploy, and administer sophisticated calculations that solve Oracle Hyperion Financial Management, Oracle Hyperion Planning, and Oracle Essbase business problems.
- Oracle BI Presentation Catalog—See the Oracle Business Intelligence Enterprise Edition product guides for more information on using the catalog.

Note: Oracle BI Presentation Catalog can be accessed from the Navigate, then Applications, BI Catalog menu.

Note: For information on system requirements, see the Oracle Enterprise Performance Management System Certification Matrix..

Troubleshooting

Administrators can generate log files throughout EPM Workspace to help technicians identify system or environmental problems or to help developers debug reports or API programs. For EPM Workspace troubleshooting information, see the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*. Logging is in the *Using EPM System Logs* chapter.

For security purposes, the following EPM Workspace parameters can also be used for troubleshooting, testing and debugging but are disabled and not available by default; Configuration URL which contains complete configuration information about your EPM Workspace installation and Oracle Hyperion Shared Services, EPM Workspace test module, and Client-side debug mode. To enable these parameters, set Client Debug Enabled parameter in the Server Settings to Yes.

Note: In Oracle General Ledger, debugging tools are disabled by default for security reasons. To enable these parameters, set the Client Debug Enabled parameter to Yes.

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Administration Tools and Tasks

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When multiple Oracle products are installed on one computer, common internal and third-party components are installed to a central location, called *Oracle Home*.

On Windows platforms, the Oracle Home (contains Oracle database products) location is defined in the system environment variable called *EPM_ORACLE_HOME* (contains all Oracle products) and the default location is `C:/Oracle/Middleware/PMSystem11R1`. Middleware contains products such as WebLogic.

On UNIX platforms, the Oracle Home value is stored in `.hyperion.<hostname>` in the home directory, and the default location is `$HOME/Oracle/Middleware/EPMSystem11R1`.

See the *Oracle Enterprise Performance Management System Installation and Configuration Guide* for information on changing the Oracle Home location.

Oracle Home contains a `\common` directory. An EPM Workspace installation adds a `EPM_ORACLE_HOME/products/Foundation/workspace` directory to Oracle Home, which is the default installation location or *Install Home* for EPM Workspace (that is, `EPM_ORACLE_HOME\products\Foundation\workspace` on Windows, or `EPM_ORACLE_HOME/products/Foundation/Workspace` on UNIX).

For Reporting and Analysis, it is possible to have multiple Install Homes on one physical host. All Java services in an Install Home run in one process space and share a GSM (not necessarily on one host). If a host has multiple Install Homes, each Install Home requires its own separate services process space and is managed by its own GSM. Services in an Install Home are referred to collectively as an Install Home.

Note: Install Home is not available in Oracle General Ledger.

Administration Tools for EPM Workspace

Subtopics

- [EPM Workspace Configuration Information](#)
- [Administer Menu](#)

EPM Workspace Configuration Information

Configuration information about EPM Workspace installations is available at:

`http://hostname:port/workspace/debug/configInfo.jsp`

where *hostname* is the name of the EPM Workspace server, and *port* is the TCP port on which the HTTP or application server is listening.

The default port for EPM Workspace is 19000 if using Oracle Application Server. 19000 is the default TCP port on which the HTTP server is listening. This port number does not depend on used application server or servlet container.

Note: To disable the configuration URL, see [“Securing Your EPM Workspace Production Environment”](#) on page 16.

EPM Workspace Timeouts

EPM Workspace manages a user's active session in these ways:

- EPM Workspace sends *keep alive* requests to all application servers (including its own) used in the user's current session.

The *keep alive* request maintains the session between the browser and the application server so that the application server does not invalidate the session. For example, once a Financial Reporting report is opened, EPM Workspace sends *keep alive* requests to the Financial Reporting server so that the user can open more Financial Reporting reports without having to reopen the session with the Financial Reporting application server.

The interval for sending these requests is configured by the EPM Workspace Server Settings, *KeepAliveInterval* property. This property must be set to less than the timeout value for any application server used by EPM Workspace, if it is set to a higher value, the user may receive error messages due to application server timeouts.

- EPM Workspace closes the session when the user has stopped using EPM Workspace but has not closed the browser.

If there is no activity in EPM Workspace per the EPM Workspace Server Setting, *SessionTimeout* property, the user is warned that the session is about to end. If the user does not take action within five minutes, the user is logged out.

Use the WebLogic Administration Console to edit the timeout setting for the EPM Workspace deployment.

Note: In EPM Workspace, all Reporting and Analysis Web applications session timeouts should be greater than 10 minutes.

In Oracle General Ledger, all Oracle Hyperion Financial Reporting and Calculation Manager session timeouts should be greater than 10 minutes.

Lucene Index Report

This is a report on the Lucene search indices used by online help. Information is available at:

`http://<hostname>:<port>/workspace/debug/helpIndexInfo.jsp`

The Lucene Index report is only accessible if the Client Debug Enabled entry is set to Yes in the EPM Workspace Server Settings module.

Administer Menu

Use the Administer menu to manage EPM Workspace:

- Oracle Hyperion Shared Services Console—Your organization, including adding and modifying users, groups, and roles, through the Shared Services Console
Note: Shared Services Console is not available in Oracle General Ledger.
- Annotations, see the *Oracle Hyperion Financial Reporting User's Guide*.
- BI Presentation Services, see the *Oracle Business Intelligence Answers User's Guide*.
- Oracle Hyperion Calculation Manager, see the *Oracle Hyperion Calculation Manager Designer's Guide*.

Starting and Stopping Services for EPM Workspace

To start EPM Workspace, you start services in each Install Home, and start each installation of EPM Workspace servlets (usually on a Web server).

This section focuses on how to start services of an Install Home, except for a discussion at the end about starting various Install Home services and hosts of a distributed system.

In EPM Workspace, how you start services depends on your operating system, Oracle Hyperion Reporting and Analysis system configuration, and objectives. How you stop services depends on how you started them. (See the *Oracle Hyperion Reporting and Analysis Framework Administrator's Guide* for more information.)

In Oracle General Ledger, how you start services depends on your operating system, your system configuration, and objectives. How you stop services depends on how you started them.

Changing Service Port Assignments

For information on system requirements, see the Oracle Enterprise Performance Management System Certification Matrix. Also review the *Oracle Enterprise Performance Management System Installation Start Here* guide for information about release compatibility, prerequisites, default ports, and other information needed to plan a successful installation.

Note: You cannot change service port assignments in Oracle General Ledger.

Starting EPM Workspace

Start EPM Workspace server according to the instructions given in your Web server documentation. Make the URL available to your system's end-users. Starting Oracle Home Services is a separate service or shell script.

For Windows, see Oracle Foundation Services Manager in `MIDDLEWARE_HOME/user_projects/epmsystem1/bin/startFoundationServices.bat`. where the default location for `MIDDLEWARE_HOME` is `C:\Oracle\Middleware`.

For UNIX, see Oracle Foundation Services Manager in `MIDDLEWARE_HOME/user_projects/epmsystem1/bin/startfoundationservices.sh`. The Oracle Process Manager is the service that is used to start the `httpserver`.

For EPM Workspace, enter the following URL:

```
http://hostname:port/workspace/
```

where `hostname` is the name of the EPM Workspace server, and `port` is the TCP port on which the application server is listening. The default port for EPM Workspace is 19000 if using Oracle Application Server. 19000 is the default TCP port on which HTTP server, for example Oracle Application server, is listening. This port number does not depend on used application server or servlet container (including Oracle Application server).

Note: In Oracle General Ledger, there are no start or stop scripts for shiphome JEE components. Control is handled through Enterprise Manager or Web Logic Administrator console. For more information, see *Oracle Fusion Applications Installation Guide*.

Note: See *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide* for more information on starting EPM Workspace.

Securing Your EPM Workspace Production Environment

For security purposes, the following EPM Workspace parameters are disabled and not available by default. To enable these parameters, set the **Client Debug Enabled** parameter in the Server Settings to **Yes**.

- **Configuration URL**—See “[EPM Workspace Configuration Information](#)” on page 14 for details about system configuration which requires administrative credentials to access.
- **EPM Workspace test module**—`wksp.widgets` contains test cases and debugging utilities and is accessible when EPM Workspace is running in debug mode.
- **Client-side debug mode**—Client-side debug console – `pass debug = true`, which is used for debugging purposes. This enables the debug console which shows client debug messages and also forces the application to use the uncrunched Javascript code.

EPM Workspace ships with uncrunched JavaScript code for troubleshooting.

► To remove this code so that it cannot be accessed:

- 1 Follow the instructions to “[Extract a file in the EPM Workspace Web Application](#)” on page 18.
- 2 Delete the `.js` files under `bpmstatic/js` and `static/js` that do not match the directory name in which they exist

For example, remove all files in `/js/com/hyperion/bpm/web/common` except for `/js/com/hyperion/bpm/web/common/Common.js`.
- 3 Follow the instructions to “[Repackage a file inside the Workspace Web Application](#)” on page 19.

Note: Applying service fixes restores these files.

Lifecycle Management in EPM Workspace

Oracle Hyperion Enterprise Performance Management System Lifecycle Management provides a consistent way for EPM System products to migrate an application, a repository, or individual artifacts across product environments and operating systems. Generally, the Lifecycle Management interface in Shared Services Console is consistent for all EPM System products that support Lifecycle Management. However, Oracle Enterprise Performance Management System products display different artifact listings and export and import options in the Lifecycle Management interface.

Lifecycle Management features:

- Viewing applications and folders
- Searching for artifacts
- Migrating directly from one application to another
- Migrating to and from the file system
- Saving and loading migration definition files
- Viewing selected artifacts
- Auditing migrations
- Viewing the status of migrations
- Importing and exporting individual artifacts for quick changes on the file system

In addition to providing the Lifecycle Management interface in Oracle Hyperion Shared Services Console, there is a command-line utility called Lifecycle Management Utility that provides an alternate way to migrate artifacts from source to destination. The Lifecycle Management Utility can be used with a third-party scheduling service such as Windows Task Scheduler or Oracle Enterprise Manager.

Lastly, there is a Lifecycle Management Application Programming Interface (API) that enables users to customize and extend the Lifecycle Management functionality.

For detailed information about Oracle Hyperion Enterprise Performance Management System Lifecycle Management, see the *Oracle Enterprise Performance Management System Lifecycle Management Guide*.

Patching a File in EPM Workspace Web Application

Subtopics

- [Extract a file in the EPM Workspace Web Application](#)
- [Repackage a file inside the Workspace Web Application](#)

The patching and extract procedures in this section only apply to customizations described in this guide. All customizations or manual modifications of the web application or static files may need to be reapplied if you apply an official Oracle OPatch. Oracle recommends keeping records regarding any customizations so that they can be re-implemented on officially patched files. Do not overwrite newly patched files with old customized files.

Extract a file in the EPM Workspace Web Application

► To extract files in EPM Workspace Web Application:

- 1 **Stop the service for Oracle Foundation Services - Managed Server.**
- 2 **Backup file** `EPM_ORACLE_HOME/products/Foundation/workspace/InstallableApps/workspace.ear`.
- 3 **Using an unarchiving utility, extract the contents of** `EPM_ORACLE_HOME/products/Foundation/workspace/InstallableApps/workspace.ear` **into a** `<temp directory>`.
- 4 **Create** `<temp directory>/war`.
- 5 **Extract the contents of** `<temp directory>/workspace.war` **into** `<temp directory>/war`.
- 6 **Update the file you are patching under** `<temp directory>/war`.

Repackage a file inside the Workspace Web Application

► To repackage a file in EPM Workspace Web Application:

- 1 **Archive the files in** `<temp directory>/war` **into** `<temp directory>/workspace.war`.
- 2 **Archive the** `<temp directory>/workspace.war` **into** `EPM_ORACLE_HOME/products/Foundation/workspace/InstallableApps/workspace.ear`.
- 3 **Remove the contents of the WebLogic temp directory** `MIDDLEWARE_HOME/user_projects/domains/domainName/servers/FoundationServices/tmp/`.
- 4 **Remove the contents of the WebLogic temp directory** `/Documents and Settings/<machine user name>/Local Settings/Temp/<machine user name>/servers/FoundationServices/tmp/`.
- 5 **Start the Service for Oracle Foundation Services - Managed Server.**
- 6 **Clear your browser cache.**

Customizing the Logon Page in EPM Workspace

You can customize the logon page to add a proprietary disclaimer. This allows a company to broadcast this to all users when logging in to EPM Workspace. This information is displayed below the Copyright information.

► To customize the logon page in EPM Workspace:

- 1 **Stop all services.**
- 2 **Backup** `EPM_ORACLE_HOME/common/bpmui-common/11.1.2.0/bpmui.jar`.
- 3 **Using an unarchiving utility, extract the contents of** `EPM_ORACLE_HOME/common/bpmui-common/11.1.2.0/bpmui.jar` **into a <temp directory>.**
- 4 **Edit file** `<temp directory>/com/hyperion/bpm/Resources_en.properties`.
- 5 **Search for the property** `bpm.logonCopyright`.
- 6 **Modify the text to the right of the equal sign (=). Use** `\n` **to get a new line.**
- 7 **Save your changes.**
- 8 **Repeat Step 4 through step 7 for all the other** `Resources_xx.properties` **files for other locales.**
- 9 **Jar the contents of** `<temp directory>` **to** `EPM_ORACLE_HOME/common/bpmui-common/11.1.2.0/bpmui.jar`.
- 10 **Start all services.**
- 11 **Clear the browser cache.**

Customizing the Help Menu in EPM Workspace

You can update the menu text, redirect, or hide the Technical Support and EPM Documentation links located under the Help menu.

► To redirect Technical Support and EPM Documentation links:

1 Follow instructions on how to [Extract a file in the EPM Workspace Web Application](#).

2 Backup the file `<temp directory>/war/conf/WkspConfig.jsp`.

3 Edit the file `<temp directory>/war/conf/WkspConfig.jsp`.

4 Search for the module tag with id set to `wksp.mode`.

5 Modify the attributes below to the new URL:

For Technical Support, modify `helpTechSupportUri`=<http://www.oracle.com/support/index.html>.

For EPM Documentation link, modify `helpNetworkUri`="<http://www.oracle.com/technology/documentation/epm.html>".

6 Search for the module tag with id set to `wksp.logon`.

7 Modify the attributes below to the new URL:

For Technical Support link, modify `helpTechSupportUri`=<http://www.oracle.com/support/index.html>.

For EPM Documentation link, modify `helpNetworkUri`=<http://www.oracle.com/technology/documentation/epm.html>.

8 Save your changes and continue with [Repackage a file inside the Workspace Web Application](#).

Note: `helpTechSupportUri` is the URL invoked for the menu item Help, then Technical Support. `helpNetworkUri` is the URL invoked for the menu item Help, then EPM Documentation.

► To update the menu text for **Technical Support** and **EPM Documentation** links, you need to modify `bpm_en.js` in two locations, EPM Workspace Web application and on the Web Server which serves the static pages. Do the following:

1 Backup file `EPM_ORACLE_HOME/common/epmstatic/wspace/resources/bpm_en.js`.

2 Edit file `EPM_ORACLE_HOME/common/epmstatic/wspace/resources/bpm_en.js`.

3 Search for the key `MItemHelpTechSupport`.

4 Edit the text `Technical Support\ns`.

`\ns` represents the menu mnemonic `s`. You can omit or put in your own.

5 Search for the key `MItemHelpNetwork`.

6 Edit the text `EPM Documentation\ne`.

`\ne` represents the menu mnemonic `e`. You can omit or put in your own.

- 7 Save your changes.
- 8 Repeat [step 1](#) through [step 6](#) for all the other `bpm_xx.js` files for other locales.
- 9 Clear your browser cache.

Note: You do not need to restart the Oracle Hyperion Enterprise Performance Management Workspace Application Server.

➤ To remove the **Technical Support** and **EPM Documentation** links, do the following:

- 1 Follow instructions on how to [Extract a file in the EPM Workspace Web Application](#).
- 2 Backup the file `<temp directory>/war/conf/WkspConfig.jsp`.
- 3 Edit the file `<temp directory>/war/conf/WkspConfig.jsp`.
- 4 Search for the module tag with id set to `wksp.mode`.
- 5 Delete the following attributes to remove the link.

For Technical Support link, delete `helpTechSupportUri=http://www.oracle.com/support/index.html`.

For EPM Documentation link, delete `helpNetworkUri=http://www.oracle.com/technology/documentation/epm.html`.

- 6 Search for the module tag with id set to `wksp.logon`.
- 7 Delete the following attributes to remove the link

For Technical Support link, delete `helpTechSupportUri=http://www.oracle.com/support/index.html`.

For EPM Documentation link, delete `helpNetworkUri=http://www.oracle.com/technology/documentation/epm.html`.

- 8 Save your changes and continue with [Repackage a file inside the Workspace Web Application](#).

