Oracle® Hyperion Enterprise Performance Management Workspace
Administration Guide

Release 11.2.2

ORACLE®

Oracle Hyperion Enterprise Performance Management Workspace Administration Guide, Release 11.2.2

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Overview of EPM Workspace

Related Topics

- About EPM System and Enterprise Performance Management
  Oracle Enterprise Performance Management System offers a comprehensive
  Enterprise Performance Management (EPM) system that consists of several
  products.

- About EPM Workspace
  Oracle Hyperion Enterprise Performance Management Workspace is the web user
  interface that is used to access all Oracle and non-Oracle content. Oracle content
  includes all of Oracle's financial applications.

About EPM System and Enterprise Performance Management

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

- Oracle Hyperion Enterprise Performance Management Workspace—Zero-footprint
  client that provides the user interface for viewing and interacting with content
  created using authoring studios and financial applications.

- 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

Oracle Hyperion Enterprise Performance Management Workspace is the web user
interface that is used to access all Oracle and non-Oracle content. Oracle content
includes all of Oracle's financial applications.

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, and Oracle Hyperion
  Profitability and Cost Management.

- 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 Hyperion Financial Close Management—Helps companies define, execute, and report on the interdependent activities of a financial close period

- Oracle Hyperion Calculation Manager—Create, validate, deploy, and launch calculations that solve business problems

- Oracle Hyperion Shared Services Console—Security components and migration of Oracle Enterprise Performance Management System products

> **Note:**
>
> 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 located at http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html

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Administration Tools and Tasks

Related Topics

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

- Administration Tools for EPM Workspace
  Administration tools include the Administer menu, configuration information, and timeouts.

- Starting and Stopping Services for EPM Workspace
  To start Oracle Hyperion Enterprise Performance Management Workspace, you start services in each Install Home, and start each installation of EPM Workspace servlets (usually on a web server).

- Changing Service Port Assignments
  Review *Oracle Enterprise Performance Management System Installation Start Here* for information about release compatibility, prerequisites, default ports, and other information needed to plan a successful installation.

- Starting EPM Workspace
  Start the Oracle Hyperion Enterprise Performance Management Workspace server according to the instructions given in your web server documentation.

- Securing Your EPM Workspace Production Environment
  For security purposes, several parameters are disabled and are not available by default.

- Lifecycle Management
  Oracle Hyperion Enterprise Performance Management System Lifecycle Management provides a consistent way for Oracle Enterprise Performance Management System products to migrate an application, a repository, or individual artifacts across product environments and operating systems.

- Patching a File in the EPM Workspace Web Application
  Oracle recommends keeping records on customizations so they can be re-implemented on officially patched files. Do not overwrite newly patched files with old customized files.

- Customizing the Logon Page
  You can customize the logon page to add a proprietary disclaimer.

- Troubleshooting
  Administrators can generate log files in Oracle Hyperion Enterprise Performance Management Workspace to identify system or environmental problems or to debug reports and API programs.

Understanding Oracle Home and Install Home

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 Oracle Hyperion Enterprise Performance Management 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).

Administration Tools for EPM Workspace

Administration tools include the Administer menu, configuration information, and timeouts.

Related Topics

- Administer Menu
- EPM Workspace Configuration Information
- EPM Workspace Timeouts

Administer Menu

Use the Administer menu in Oracle Hyperion Enterprise Performance Management Workspace to manage the following:

- Workspace Settings (see Accessing EPM Workspace Server Settings)
- Consolidation Administration
- Planning Administration
- Data Management
- Calculation Manager (see *Oracle Hyperion Calculation Manager Designer's Guide*)
- Shared Services Console
- Profitability Applications

EPM Workspace Configuration Information

Configuration information about Oracle Hyperion Enterprise Performance Management 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.

EPM Workspace Timeouts

Oracle Hyperion Enterprise Performance Management 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 Oracle Hyperion 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, **Keep-Alive Interval** property. This property must be set to less then 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, **Session Timeout** setting, 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:**
>
> All web applications session timeouts should be greater than 10 minutes.

Starting and Stopping Services for EPM Workspace

To start Oracle Hyperion Enterprise Performance Management Workspace, you start services in each Install Home, and start each installation of EPM Workspace servlets (usually on a web server).

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

Changing Service Port Assignments

Review *Oracle Enterprise Performance Management System Installation Start Here* for information about release compatibility, prerequisites, default ports, and other information needed to plan a successful installation.

For information on system requirements, see the Oracle Hyperion Enterprise Performance Management System Certification Matrix at http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html.

Starting EPM Workspace

Start the Oracle Hyperion Enterprise Performance Management 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 the Oracle Hyperion 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 the Foundation Services Manager in `MIDDLEWARE_HOME/user_projects/epmsystem1/bin/startfoundationservices.sh`. The Oracle Process Manager is the service used to start the http server.

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).

Securing Your EPM Workspace Production Environment

For security purposes, several parameters are disabled and are not available by default.

To enable these parameters, set the **Client Debug Enabled** parameter in the Workspace Server Settings to Yes.

- **Configuration URL**—See EPM Workspace Configuration Information for details about system configuration that requires administrative credentials to access.

- **EPM Workspace test module**—`wksp.widgets` contains test cases and debugging utilities and is accessible when Oracle Hyperion Enterprise Performance Management 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 Extracting a File in the EPM Workspace Web Application.

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 about Repacking a File in the EPM Workspace Web Application.

   Note that applying service fixes restores these files.

Lifecycle Management

Oracle Hyperion Enterprise Performance Management System Lifecycle Management provides a consistent way for Oracle Enterprise Performance Management System products to migrate an application, a repository, or individual artifacts across product environments and operating systems.

Generally, the Lifecycle Management interface in Oracle Hyperion Shared Services Console is consistent for all EPM System products that support Lifecycle Management. However, EPM 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 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 Oracle Fusion Lead Management functionality.

Patching a File in the EPM Workspace Web Application

Oracle recommends keeping records on customizations so they can be re-implemented on officially patched files. Do not overwrite newly patched files with old customized files.

The patching and extract procedures described in the following topics apply only to customizations described in this guide. All customizations or manual modifications of the web applications or static files may need to be reapplied if you apply an official Oracle OPatch.

- Extracting a File in the EPM Workspace Web Application
- Repacking a File in the EPM Workspace Web Application

Extracting a File in the EPM Workspace Web Application

To extract files in the Oracle Hyperion Enterprise Performance Management Workspace web application:

1. Stop the service for Oracle Hyperion Foundation Services Managed Server.

2. Back up the 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.

Repacking a File in the EPM Workspace Web Application

To repackage a file in the Oracle Hyperion Enterprise Performance Management 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 Hyperion Foundation Services Managed Server.

6. Clear your browser cache.

Customizing the Logon Page

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 Oracle Hyperion Enterprise Performance Management Workspace. This information is displayed below the Copyright information.

To customize the logon page:

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.

Troubleshooting

Administrators can generate log files in Oracle Hyperion Enterprise Performance Management Workspace to identify system or environmental problems or to debug reports and 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

• Client-side debug mode

To enable these parameters:

1. In EPM Workspace, select **Navigate**, then **Administer**, then **Workspace Settings**, and then **Server Settings**.

2. In **Workspace Server Settings**, set the **Client Debug Enabled** parameter in to **Yes**.

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Administering EPM Workspace

Related Topics

- [Managing Users](#)
  Administering Oracle Hyperion Enterprise Performance Management Workspace involves managing users, groups, and roles.

- [Assigning Preferences for Users and Groups](#)
  For default preferences to succeed, users and groups must have the roles and permissions necessary to access specified folders and interface elements.

- [Accessing EPM Workspace Server Settings](#)
  To access Oracle Hyperion Enterprise Performance Management Workspace Server settings, select **Navigate**, then **Administer**, then **Workspace Settings**, and then **Server Settings**.

- [Customizing the User Interface](#)
  Customizing the user interface involves, changing the default language selection, replacing the logon panel image, redirecting URLs, and removing client installers.

- [Organizing Items and Folders](#)
  For efficient Oracle Hyperion Enterprise Performance Management Workspace functioning, structure folders so that users can access items quickly and easily.

Managing Users

Administering Oracle Hyperion Enterprise Performance Management Workspace involves managing users, groups, and roles.

For information on managing users, groups, and roles, see the *Oracle Enterprise Performance Management System User Security Administration Guide*.

Assigning Preferences for Users and Groups

For default preferences to succeed, users and groups must have the roles and permissions necessary to access specified folders and interface elements.

To manage preferences, you must have administrator rights. In order to see content, you also need sufficient rights. Individual and group preferences have precedence over default preferences. See *Oracle Enterprise Performance Management System User Security Administration Guide* for more information.

To assign preferences for users and groups:

1. In Oracle Hyperion Enterprise Performance Management Workspace, select **Navigate**, then **Administer**, then **Workspace Settings**, and then **Manage Preferences**.

2. In **Select Users**, select **Available Users** or **Available Groups**, and then click **Update List.**

3. Move the desired users or groups from **Available Users** or **Available Groups** to **Selected Users and Groups**, and then click **Next**.

4. In **Manage Preferences**, assign the following preferences:

   • **Default Startup Options**—Click the drop down to select which screen will initially display when you start EPM Workspace.

   • **Accessibility Mode**—Specify whether to enable screen reader support for the selected users and groups.

5. Click **Next** and then **Finish** to save the preferences for the users and groups.

Accessing EPM Workspace Server Settings

To access Oracle Hyperion Enterprise Performance Management Workspace Server settings, select **Navigate**, then **Administer**, then **Workspace Settings**, and then **Server Settings**.

> **✎ Note:**
>
> If you make changes to the EPM Workspace Server Settings, you must log out and restart the browser for the changes to take effect.

Table 3-1   General EPM Workspace Server Settings

Setting	Description
Supported Locales	Locales supported by EPM Workspace
	Select **Click here to edit** to open the Values List. You can move the supported locales between Possible Values and Assigned Values for your specific EPM Workspace configuration.
Default Locale	Default locale for the application if no user requested locales can be loaded. Default value is English.
Client Debug Enabled	Whether to suppress browser-side EPM Workspace debug features. Default value is No.
Session Timeout	Interval time in minutes before idle users are forcibly logged out of EPM Workspace from the client side. Default value is 30. Maximum value is 1440.
Keep-Alive Interval	Interval time in minutes between EPM Workspace pings to each open context in order to keep HTTP sessions alive. This is on the server side. Default value is 10.
Required Logon Role	Role required to log on to EPM Workspace. Default value is None.
Enable Native User Password Change	Whether to allow native users to change their passwords. Default value is Yes.
Accept Credentials in an HTTP Request URL	Default value is No. When set to No, the request parameters `sso_token`, `sso_username`, and `sso_password` are ignored in any HTTP request URL. They are accepted only when sent in an HTTP POST request body. Example of a URL that stops working: `http://host:port/workspace/? sso_username=admin&sso_password=mypassword`

Table 3-1   (Cont.) General EPM Workspace Server Settings

Setting	Description
Allow Direct Logon After SSO Failure	Default value is No. Select Yes to allow a user to logon directly if Single Sign-On (SSO) is enabled and SSO authentication fails.
Enable User Display Name	Default value is No. If set to Yes, the user's full display name is displayed in the welcome message area in the upper-right corner of EPM Workspace. The display name usually consists of First and Last Name. For example, when the value is set to Yes, **Logged in as John Smith** is displayed instead of **Logged in as JSMITH**.
Remember User Name at Logon	When set to Yes, the user's name is remembered as a cookie after a successful logon (otherwise, an existing cookie is deleted). The default value is No.

Table 3-2   EPM Workspace Messaging

Setting	Description
Message File	Select **Click here to edit** to open a dialog box where you can enter text for the message you want to send out to users. Messages are sent to all users who are currently logged in or users logging in to EPM Workspace for the first time.
Client Message Polling Interval	Time interval for checking new messages. Value entered is in minutes. A value of zero disables messaging system and newly logged on users do not receive messages. Default is 0.
Server Message Cache	How often the web application checks for changes in message status. Use this parameter if you update messages from the command line. Note that if messages are changed from the dialog box, the changes take effect immediately. The value entered represents minutes. Default value is 10 minutes.
Iframe Sandbox Options	Applies extra restrictions to the content in Iframes when they are used to display uploaded HTML content and when a URL is manually launched. This helps to protect against XSS. Select **Click here to edit** to access the available values. See "sandbox" in <iframe>: The Inline Frame element for a description of the values.
	Note: The values list does not include the "allow-same-origin" value because this would defeat the XSS protection.

Table 3-2   (Cont.) EPM Workspace Messaging

Setting	Description
URI to User Productivity Kit **Note:** UPK is available in EPM Workspace only for products that support it; for example, Oracle Hyperion Planning and Oracle Hyperion Financial Management.	The Oracle User Productivity Kit (URI) includes a library designed to support users in live environments. When integrated with help systems, UPK delivers context-sensitive training simulations that reflect the way users complete tasks. To implement UPK: 1. Enter the following URI in the **URI to User Productivity Kit** field: `http://<anydomain/ full_content_path_to_upk_content/>` This is the location where the UPK is located. For the products accessed in EPM Workspace, `{gateway-page}` in the URL `http://any_domain/ full_content_path_to_UPK_content/{gateway_page}` is where Oracle content is located. Do not enter `{gateway-page}` in the URI to User Productivity Kit field. EPM Workspace automatically appends the correct value `{gateway-page}` in the URL `http:// any_domain/full_content_path_to_UPK_content/ {gateway_page}`. An example of a URI to enter is `http://localhost/ upkcontent` 2. Click **OK**. 3. Log out of EPM Workspace. 4. Log back in to EPM Workspace, and UPK is now enabled. **Note:** From the Help menu, the Oracle User Productivity Kit is listed. For online help, in the toolbar, there is a UPK button as well.
Post Logoff URL	URL to which the UI is redirected after users log off
Enable Installer Menu Items in Workspace	Whether to enable installer menu items in EPM Workspace. These items are located in the Tools menu. The default value is Yes.
Enabled Products	Disable products which are installed but not running. Select **Click here to edit** to open a dialog box with products that can be deselected. If the checks are cleared, the products are de-integrated at the next logon, as if they were never installed.

Customizing the User Interface

Customizing the user interface involves, changing the default language selection, replacing the logon panel image, redirecting URLs, and removing client installers.

Related Topics

- Changing the Default Language Selection

- Replacing the Logon Panel Image

- Redirecting URLs After Users Log Off

- Removing Access to Client Installers

Changing the Default Language Selection

Oracle Hyperion Enterprise Performance Management Workspace reads locale information from your web browser and selects the language to use based on browser locale settings. In certain cases, you may want to view content in a language other than that determined by the browser locale. You can override locale-based language selection by adding languages to your web browser language options and moving the language that you want the browser to use to the top of the list.

EPM Workspace automatically selects the supported language in order of priority. It attempts an exact match between language and locale code. If a close match is not found, EPM Workspace attempts to match based only on language code and ignores the country code.

> **Note:**
>
> The settings that you select for the default language apply to all of the components in EPM Workspace.

Replacing the Logon Panel Image

To replace the image that is displayed on the logon panel:

1. Create an image file named `logon_panel.gif` with dimensions that match a previous image.

2. Follow the steps to Extracting a File in the EPM Workspace Web Application.

3. Replace the `logon_panel.gif` file in the following directory with the `logon_panel.gif` file that you created in step 1:

    `<temp directory>/war/bpmstatic/themes/theme_skyros/images_global/`

4. Follow the steps to Repacking a File in the EPM Workspace Web Application.

Redirecting URLs After Users Log Off

To facilitate integration with custom portals, administrators can redirect web browsers to an arbitrary static URL after users log off Oracle Hyperion Enterprise Performance Management Workspace. This setting can be configured in Workspace Server Settings. See **Post Logoff URL** in Accessing EPM Workspace Server Settings. Note that the default is to log users off from EPM Workspace.

Removing Access to Client Installers

Administrators can hide the **Install** menu option (**Tools**, and then **Install**) that enables users to install Oracle Enterprise Performance Management System clients. This setting can be configured in Workspace Server Settings. See **Enable Installer Menu Items in Workspace** in Accessing EPM Workspace Server Settings.

Organizing Items and Folders

For efficient Oracle Hyperion Enterprise Performance Management Workspace functioning, structure folders so that users can access items quickly and easily.

In the folder hierarchy, balance folder size against hierarchy depth. Folders should not contain large numbers of items or excessive numbers of levels in the folder hierarchy. Certain folders should not be deleted.