Oracle® Enterprise Performance Management System

Standard Deployment Guide

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Oracle Enterprise Performance Management System Standard Deployment Guide, Release 11.2

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1
EPM System Standard Deployment Overview

Related Topics

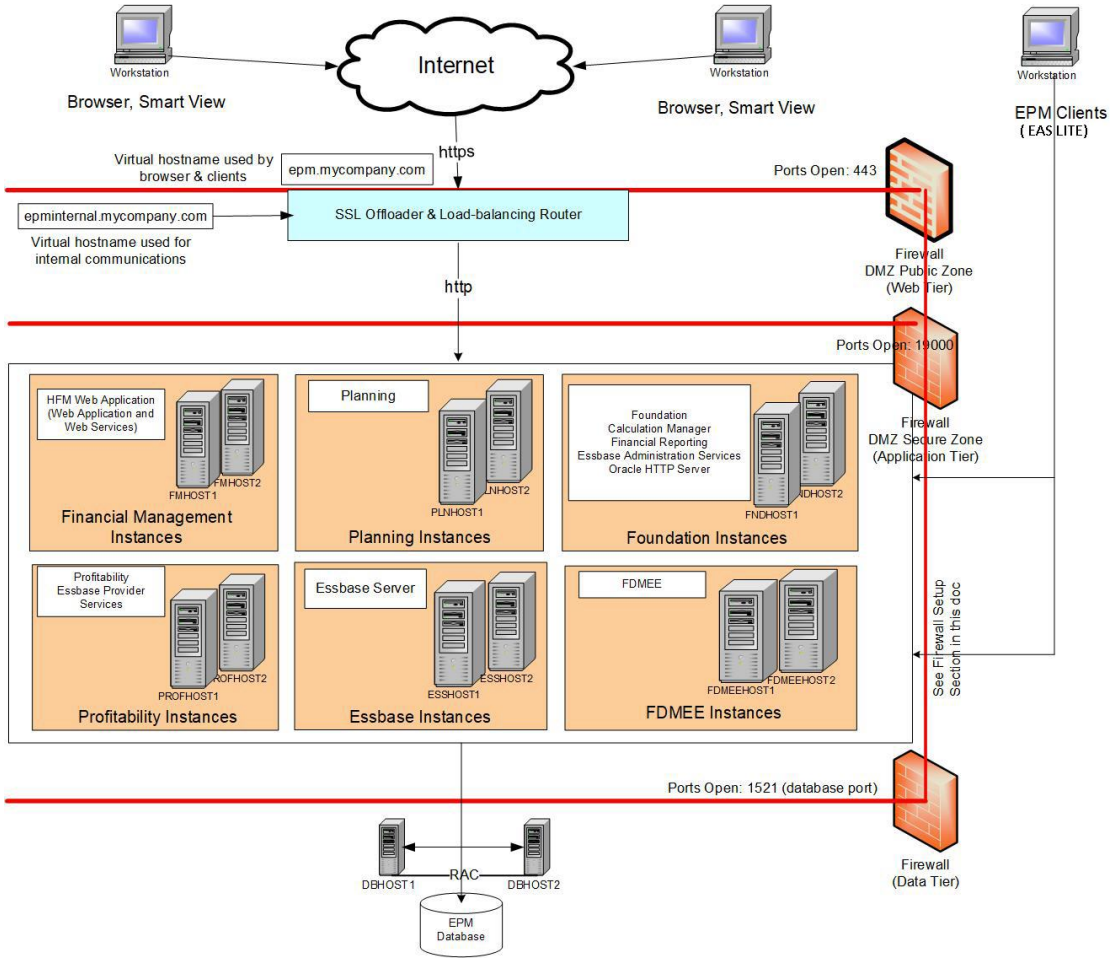
- About Standard Deployment
- Standard Deployment Topology
- Deployment Directory Structure and Location Reference
- Deployment Approach

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 2016 or 2019 operating system and Oracle database 12*c*, Release 2, applies 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.

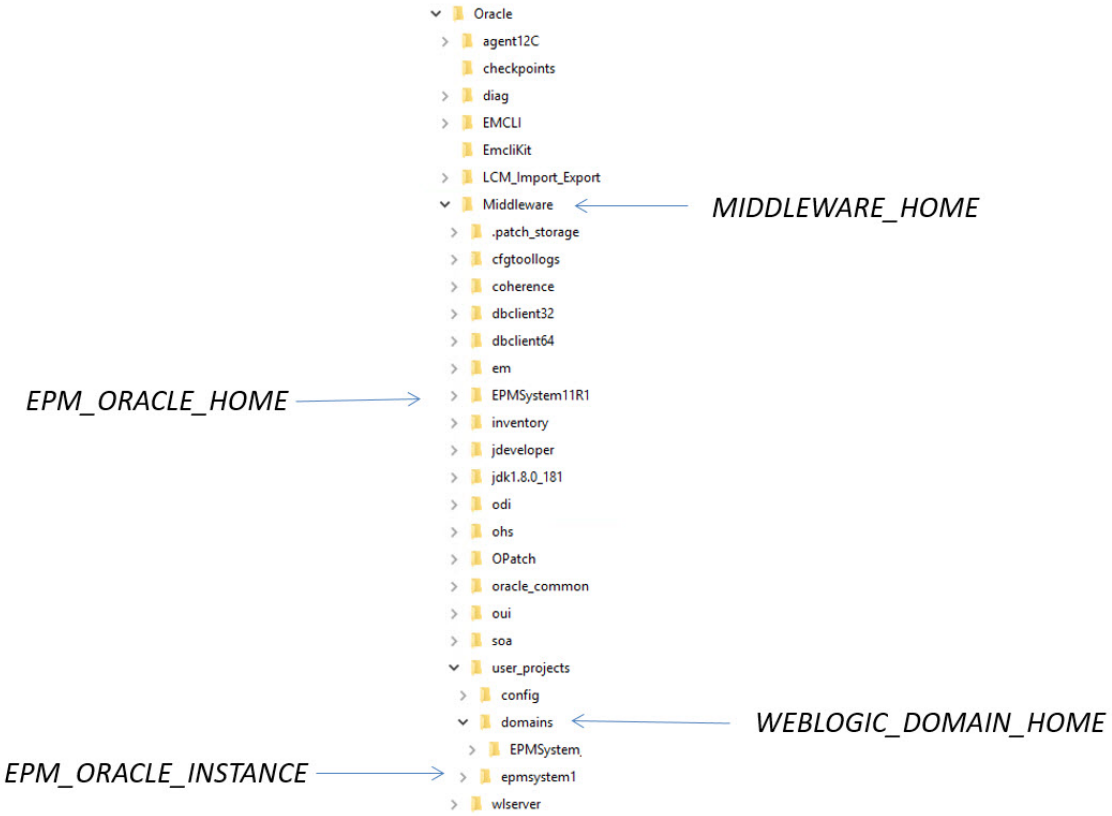


For the standard deployment, you set up a base deployment with one EPM Oracle instance for each component, validate that it is working, and then scale out each instance, depending on your high-availability and system-load requirements.

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

Deployment Directory Structure and Location Reference

The following illustration shows the enterprise deployment directory structure on each server. Binaries and configuration files for each Oracle Enterprise Performance Management System component are located only on the server on which the component is installed. For example, Oracle 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:

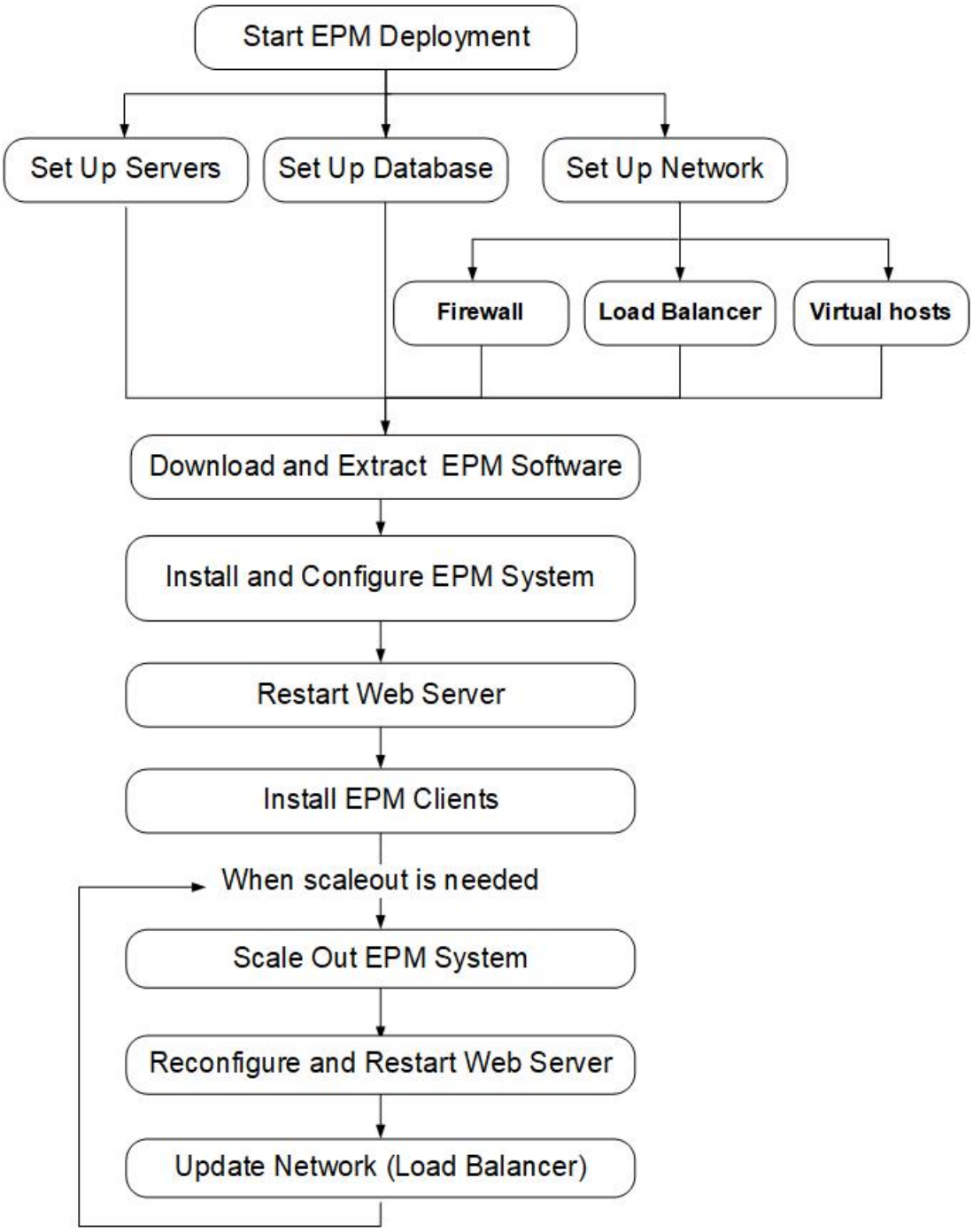
- Exported or imported artifacts using Oracle Hyperion Enterprise Performance Management System Lifecycle Management
- Oracle Essbase Studio sample and customer data source text files
- Oracle Hyperion Financial Data Quality Management, Enterprise Edition data

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 Oracle Enterprise Performance Management 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.

When SSL is being terminated at Oracle HTTP Server (OHS) or load balancer, you must:

- Set every Logical Web Application to non-ssl virtual host of load balancer or Oracle HTTP Server (for example, `empinternal.myCompany.com:80` where 80 is the non-SSL port). Open Configuration screen, complete these steps:
  1. Expand **Hyperion Foundation** configuration task.
  2. Select **Configure Logical Address for Web Applications**.
  3. Specify the *Host name*, non-SSL port number and SSL port number.
- Set external URL to SSL-enabled virtual host of load balancer or Oracle HTTP Server (for example, `empexternal.myCompany.com:443` where 443 is the SSL port). Open Configuration screen, complete these steps:
  1. Expand **Hyperion Foundation** configuration task.
  2. Select **Configure Common Settings**.
  3. Select **Enable SSL offloading** under External URL Details.
  4. Specify the *External URL Host* and *External URL Port*.

> **Note:**
>
> Redeploying web applications or reconfiguring the web server using **configtool** will replace the settings for Logical Web Application and external URLs.

2
Deployment Requirements

Related Topics

- Server Capacity Specifications
- Server Requirements
- Client Machine Requirements
- Deployment User Requirements
- Environment Details

Server Capacity Specifications

The Standard Deployment Topology defines the following EPM Oracle instances for these components. Components can be installed on these servers, which have the Microsoft Windows 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.

Table 2-1 Minimum Server Specifications for Standard Deployment

Oracle Enterprise Performance Management System Instance	Server/Instance	Processor	Memory	Scales Horizontally?
Foundation	*FNDHOST1*	4 core	16 GB	Yes
Planning	*PLANHOST1*	4 core	10 GB	Yes
Essbase	*ESSHOST1*	4 core	10 GB	Yes
Financial Management Server (dedicated to Oracle Hyperion Financial Management Server) This recommendation does not take into account having the database on the same server. This recommendation is for a small application. Increase as needed based on application size.	*HFMHOST1*	8 core	64 GB	Yes
Profitability	*HPCMHOST1*	4 core	10 GB	Yes
FDMEE	*FDMEEHOST1*	4 core	10 GB	Yes

Server 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

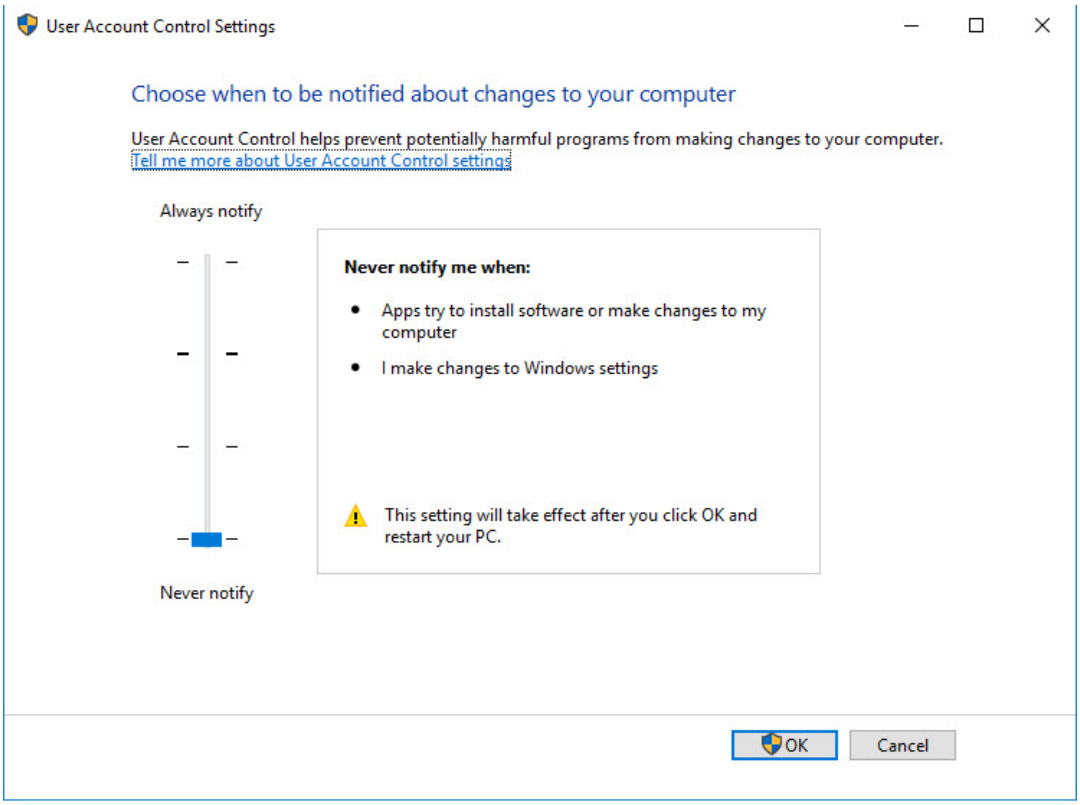
You must disable the operating system firewalls on the servers in the deployment. Refer to your Windows documentation for information on disabling the operating system firewall.

User Access Control

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

To turn off user account control:

1. Log on to the server using the deployment account.
2. On the server, click **Start**, and then **Control Panel**.
3. In Control Panel, click **User Accounts**, and then **User Accounts**.
4. In **Make changes to your user account**, click **Change User Account Control settings**.
5. Drag the user account control slider to **Never Notify**.



6. Click **OK**.

Example 2-1 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.

Example 2-2 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
- Artifacts for Oracle Hyperion Enterprise Performance Management System Lifecycle Management in Oracle Hyperion Shared Services
- Location for Oracle Essbase Studio sample and customer data source text files
- Data directory for Oracle Hyperion Financial Data Quality Management, Enterprise Edition 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

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.
- Add the URL for Oracle Hyperion Enterprise Performance Management Workspace to the trusted zone:
  1. Select **Tools**, then **Internet Options**, and then 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**, and then the **Security** tab.
  2. Select the zone containing Oracle servers, and then 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

A supported version of Microsoft Office must be installed on client machines that host Oracle Smart View for Office.

.NET Framework

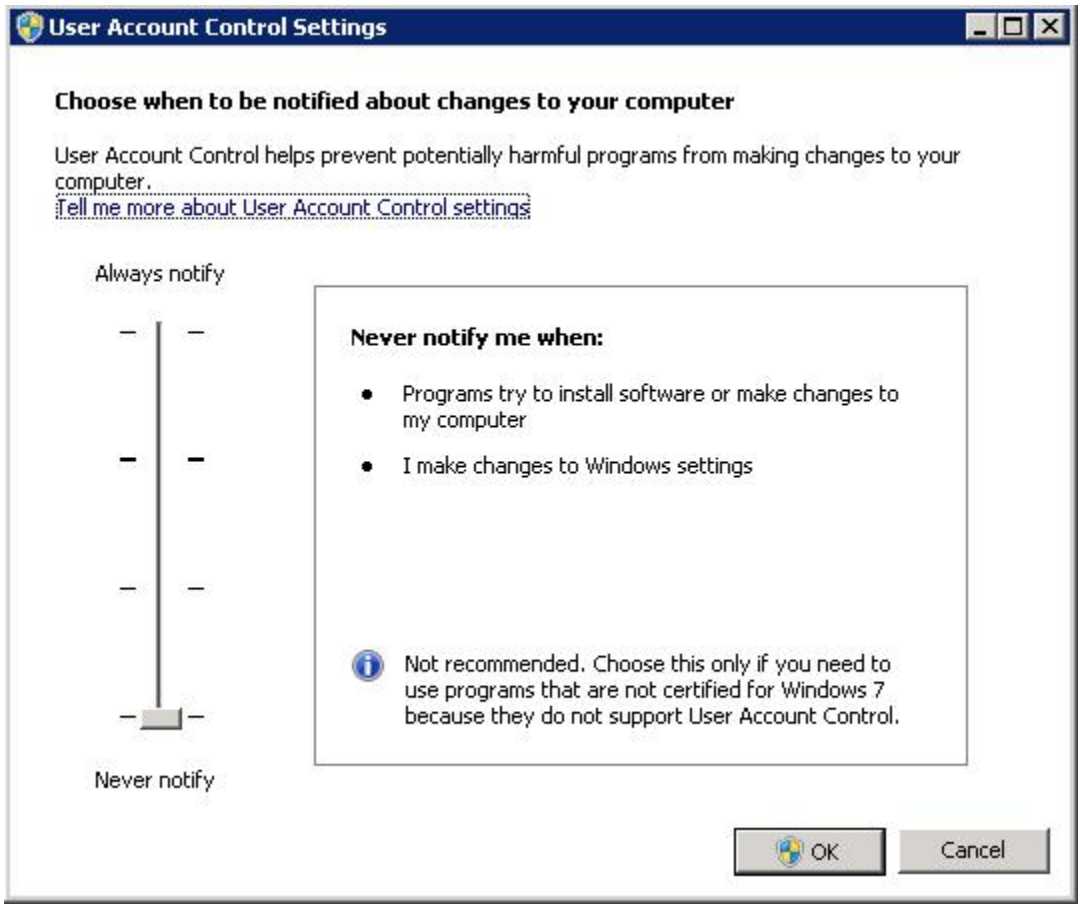
.NET Framework 4.7.2 must be installed on client machines that host Smart View.

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 Oracle Enterprise Performance Management 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.

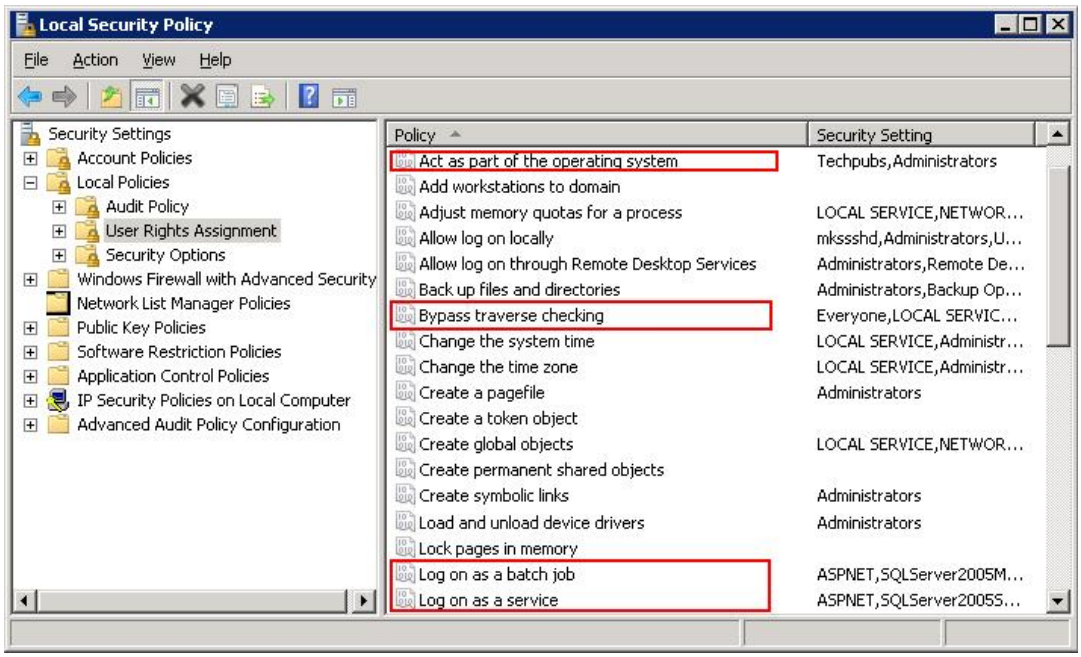
The deployment user account is referred to as the *deployment user* in this document and appears as **deployment_user** in screen captures. Use the *deployment user* for the following tasks:

- Install, configure, and patch EPM System
- 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 **Windows Administrative Tools**, and then **Local Security Policy**. In **Local Security Policy**, expand **Local Policies**, and then select **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 Oracle WebLogic Server and

Oracle Hyperion Shared Services. Make a note of this user and password for use during configuration with EPM System Configurator.

Environment Details

Use this section to record the details for your environment.

Table 2-2 Deployment Environment Checklist

Item	Value for Your Deployment
User Checklist	
Deployment user name to log in to servers	
Password of the deployment user	
System administrator user name for logging in to WebLogic and Oracle Hyperion Shared Services	
Password of the System administrator user	
Shared Disk Checklist	
Location of shared disk	

3
Setting Up Oracle Database

Related Topics

- Database Settings
- Database Accounts for EPM System Deployment
- Database Checklist

Database Settings

Create an Oracle 12*c* database with AL32UTF8 character set encoding, and set the following database parameters:

- ```
  ALTER SYSTEM SET processes=2000 SCOPE=SPFILE;
  ALTER SYSTEM SET OPEN_CURSORS=5000 SCOPE=SPFILE;
  ALTER SYSTEM SET SESSION_CACHED_CURSORS=200 SCOPE=SPFILE;
  ALTER SYSTEM SET SESSIONS=2000 SCOPE=SPFILE;
  ```
- The `sqlnet.ora file` in the database server (in `%ORACLE_HOME%\product\xx.x.x\dbhome_1\network\admin\sqlnet.ora`) should have the following setting: `sqlnet.expire_time=10`
- Set the `max_string_size` setting to `standard`.

After setting parameters, restart Oracle Database (both the Listener and the Oracle Database service).

Optionally, you can specify unlimited quota for EPM schemas.

Database Accounts for EPM System Deployment

Create the following database accounts to support new Oracle Enterprise Performance Management System deployments:

- One account for EPM System Repository
- One account for a 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 a 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

Grant privileges to users by entering the following command:

```
grant CREATE ANY SYNONYM, CREATE CLUSTER, CREATE INDEXTYPE, CREATE PROCEDURE,
CREATE SEQUENCE, CREATE SESSION, CREATE TABLE, CREATE TRIGGER, CREATE TYPE,
CREATE VIEW, DROP ANY SYNONYM to <epm_user>;
```

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 3-1 Database Checklist

Purpose	Database Host	Database Port	Service Name	User Account	Account Password
Oracle Enterprise Performance Management System Repository					
Oracle Hyperion Planning Application Database					
Oracle Hyperion Profitability and Cost Management Application Database					

4
Setting Up Network

Related Topics

- Firewall Setup
- Virtual Hosts Setup
- Setting Up the Load Balancer

Firewall Setup

The following firewall ports must be opened for Oracle Enterprise Performance Management System:

Table 4-1 Default Firewall Ports for EPM System

Firewall	Ports to Open[1]	Comments
Web-tier Firewall	443 (SSL Port)	
Application-tier Firewall	19000 (Oracle HTTP Server Port)	
Application-tier Firewall (Thick-client access)	19000 (Oracle HTTP Server Port) 1423 (Oracle Essbase Server/Agent Port) 32768-33768 (Essbase Databases Ports) 5300 (Listen port) and 12080 (HTTP Listen port) (Oracle Essbase Studio) 8205-8228 (Oracle Hyperion Financial Reporting Studio RMI Ports)	Thick clients use these ports to access EPM System
Database-tier Firewall	1521	

[1] Default ports are listed.

Table 4-2 Financial Management Server Port

Port Type	Default Port Number	Comments
Port	9091	Default ports 9091, 9092 and 10001-10020 must be open between all Oracle Hyperion Financial Management (HFM) servers as well as Oracle Hyperion Financial Reporting (FR) and Oracle Hyperion FDMEE servers in order to function.
SSL Port	9092	
Datasource Start Port	10001	
Datasource End Port	10020 HFM uses ports in the range of 10001-10020	

Virtual Hosts Setup

Oracle Enterprise Performance Management 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 that you are using.

Setting Up the Load Balancer

> **Note:**
>
> The load balance will take care of the URL rewriting or redirection during the external load balance configuration, therefore no changes need to be made to the Oracle HTTP Server `httpd.conf` file.

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 Oracle Hyperion 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.

5

Downloading and Extracting EPM System Software

Related Topics

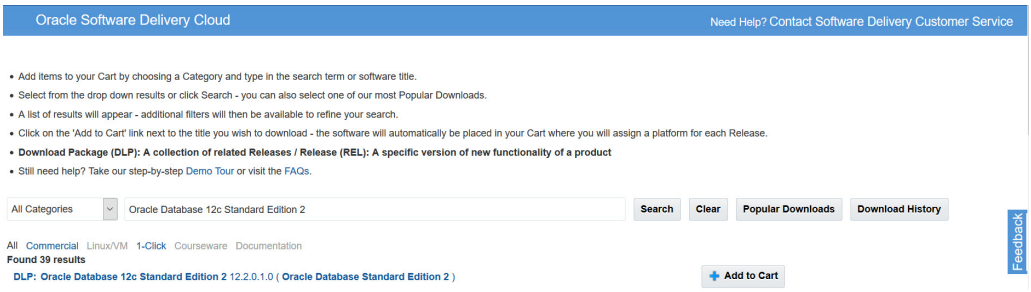
- Downloading EPM System Software
- Extracting EPM System Software

Downloading EPM System Software

This section explains how to download Oracle Database 12c Standard Edition 2 and Oracle Enterprise Performance Management System product download files and get them ready. You can download files simultaneously. You also download Oracle Smart View for Office from Oracle Technology Network.

To download from Oracle Software Delivery Cloud:

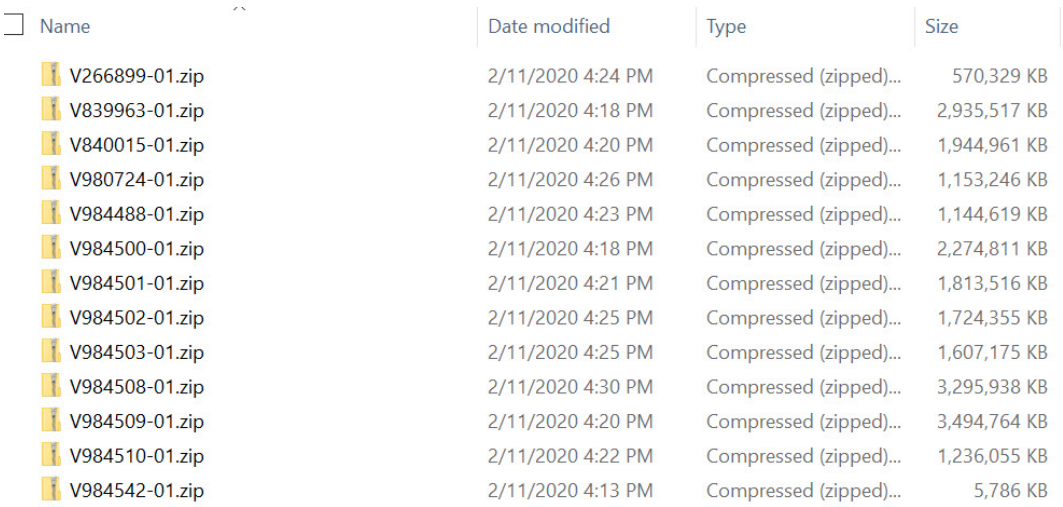
1. Using a browser, go to http://edelivery.oracle.com.
2. On the Oracle Software Delivery Cloud, click **Sign In**.
3. In **Sign In**, enter your Oracle Software Delivery Cloud user name and password, and then click **Sign In**.
4. Download files to install Oracle Database.
   a. In the search box, search for **Oracle Database 12c Standard Edition 2** and click **Search**.
   b. In the **Results** section, select **Oracle Database 12c Standard Edition 2 12.2.0.1.0 (Oracle Database Standard Edition 2)**, and then click **Add to Cart**.



5. Download files to install EPM System Oracle Hyperion Financial Management domain.
   a. Click **Clear** to clear the Search selection.
   b. In the search box, enter **Oracle Enterprise Performance Management System 11.2**, and then click **Search**.
   c. In **Results**, select the following files and then click **Add to Cart**.

- Oracle Enterprise Performance Management System - Client Installers 11.2.0.0.0
- Oracle Enterprise Performance Management System - Installation Documents and Readmes 11.2.0.0.0
- Oracle Enterprise Performance Management System - Oracle HTTP Server 11.2.0.0.0
- Oracle Enterprise Performance Management System - Part 1 11.2.0.0.0
- Oracle Enterprise Performance Management System - Part 2 11.2.0.0.0
- Oracle Enterprise Performance Management System - Part 3 11.2.0.0.0
- Oracle Enterprise Performance Management System - Part 4 11.2.0.0.0
- Oracle Enterprise Performance Management System - Part 5 11.2.0.0.0
- Oracle Enterprise Performance Management System - Part 6 11.2.0.0.0

6. Click **Checkout**.
7. In the **Platform/Languages** column, for each row, select **Microsoft Windows x64 (64-bit)** if it's not already selected, and then click **Continue**.
8. Review and accept the Oracle Standard Terms and Restrictions and then click **Continue**.
9. Use the download manager to download files: Select the check boxes next to the desired files, click **Download**, select a download location on the shared disk; for example, `//sharedhost/sharedlocation/downloads`, and then click **Save**. The single use download manager is saved.
10. From the download location, run the executable file. Browse to save the files in to a location on the shared disk, and then click **Next**.



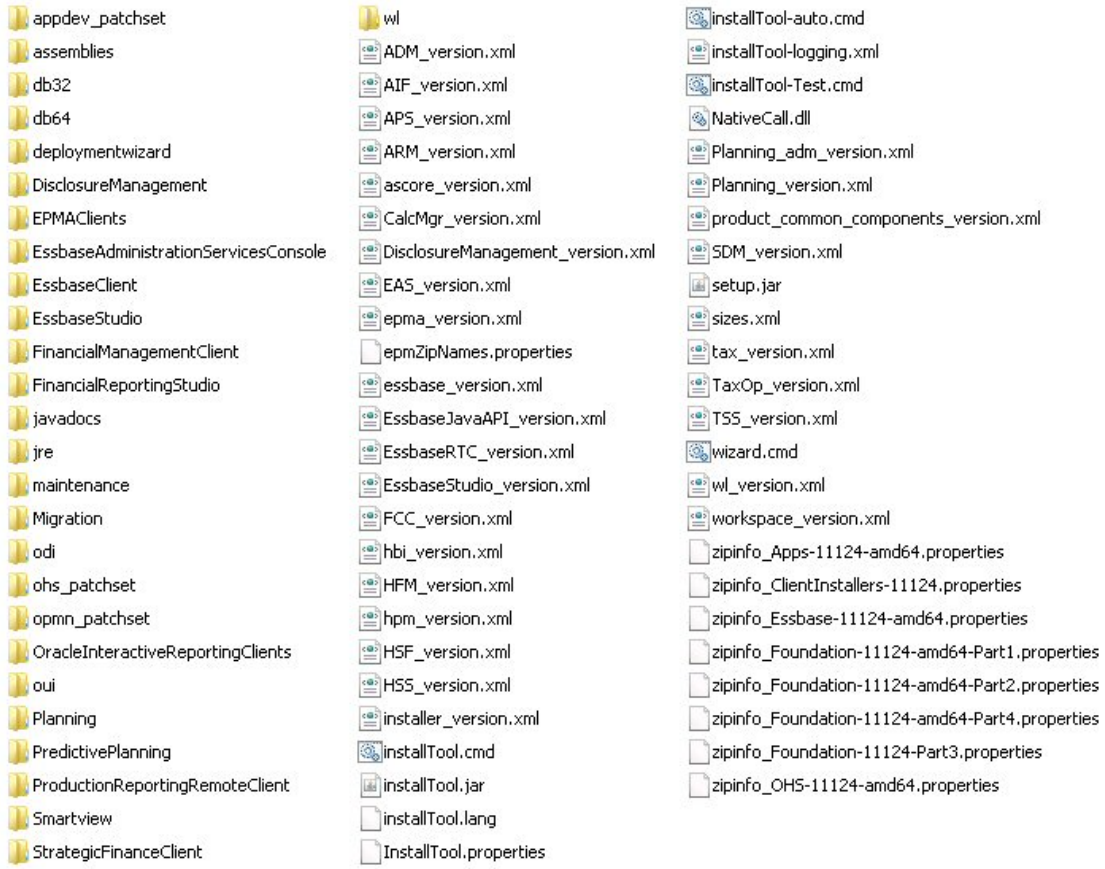
Name	Date modified	Type	Size
V266899-01.zip	2/11/2020 4:24 PM	Compressed (zipped)...	570,329 KB
V839963-01.zip	2/11/2020 4:18 PM	Compressed (zipped)...	2,935,517 KB
V840015-01.zip	2/11/2020 4:20 PM	Compressed (zipped)...	1,944,961 KB
V980724-01.zip	2/11/2020 4:26 PM	Compressed (zipped)...	1,153,246 KB
V984488-01.zip	2/11/2020 4:23 PM	Compressed (zipped)...	1,144,619 KB
V984500-01.zip	2/11/2020 4:18 PM	Compressed (zipped)...	2,274,811 KB
V984501-01.zip	2/11/2020 4:21 PM	Compressed (zipped)...	1,813,516 KB
V984502-01.zip	2/11/2020 4:25 PM	Compressed (zipped)...	1,724,355 KB
V984503-01.zip	2/11/2020 4:25 PM	Compressed (zipped)...	1,607,175 KB
V984508-01.zip	2/11/2020 4:30 PM	Compressed (zipped)...	3,295,938 KB
V984509-01.zip	2/11/2020 4:20 PM	Compressed (zipped)...	3,494,764 KB
V984510-01.zip	2/11/2020 4:22 PM	Compressed (zipped)...	1,236,055 KB
V984542-01.zip	2/11/2020 4:13 PM	Compressed (zipped)...	5,786 KB

11. When the download is complete, close the Download Manager.
12. Using a program such as 7-Zip, extract the contents of the each of the ZIP files into a location on the shared disk; for example, into `//sharedhost/sharedlocation/downloads`.
13. To download Smart View:
    a. Using a browser, go to www.oracle.com/technetwork/middleware/smart-view-for-office/downloads/index.html.
    b. Click **Oracle SmartView for Office**.
    c. Click **Download Now**, accept the license agreement and then click **Download**.
    d. Click **Save File**, browse to a location on the shared disk, and then click **Save**.
    e. Using a program, for example 7-Zip, extract the contents of the Smart View ZIP file into a location on the shared disk.

Extracting EPM System Software

On the shared disk, unzip the downloaded Oracle Enterprise Performance Management 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 screen capture.



6

Installing and Configuring EPM System

- Prerequisites
- Installing and Configuring Foundation Services
- Installing and Configuring Essbase
- Installing and Configuring Planning
- Installing and Configuring Financial Management
- Installing and Configuring Profitability and Cost Management
- Installing and Configuring FDMEE

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

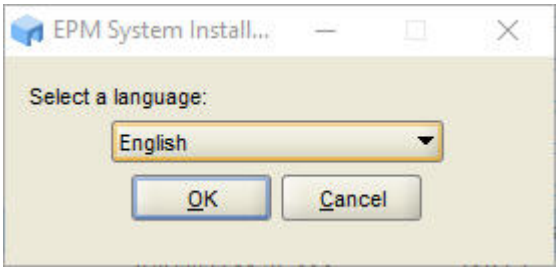
Installing and Configuring Foundation Services on FNDHOST1

- Installing Foundation Services
- Creating Infrastructure Schemas Using Repository Creation Utility (RCU)
- Configuring Foundation Services

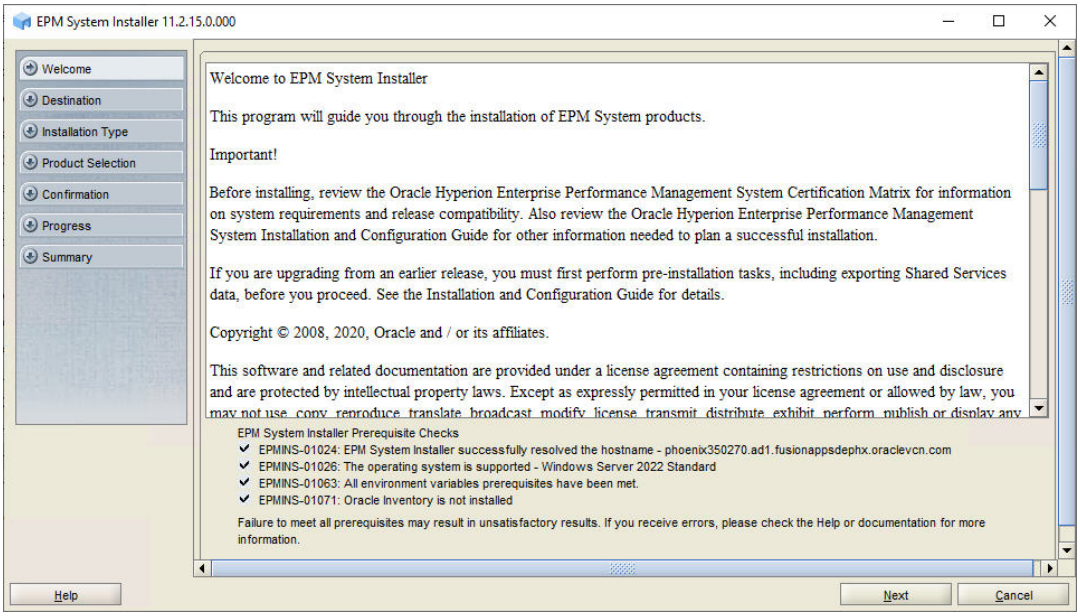
Installing Foundation Services on FNDHOST1

To install Oracle Hyperion Foundation Services on *FNDHOST1*:

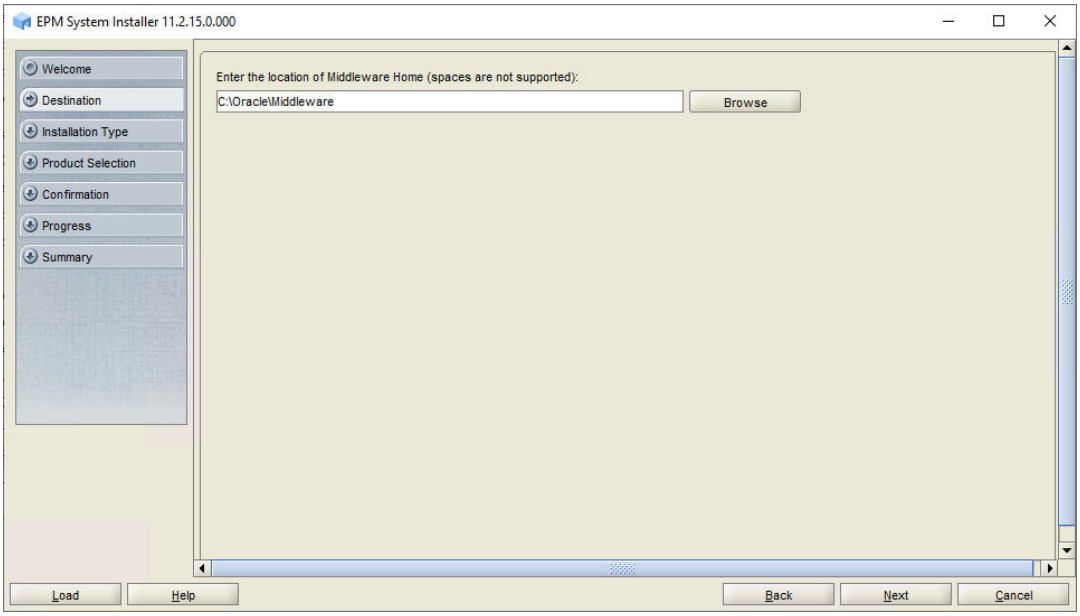
1. Log on to the Foundation Services host machine (*FNDHOST1*) as the deployment user, and define a network drive (for example, `Z:/`) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, `//sharedhost/sharedlocation/downloads/epm_unzipped`).
2. From the mapped network drive, launch `installTool.cmd`.
3. In EPM System Installer, select a language, and then click **OK**.



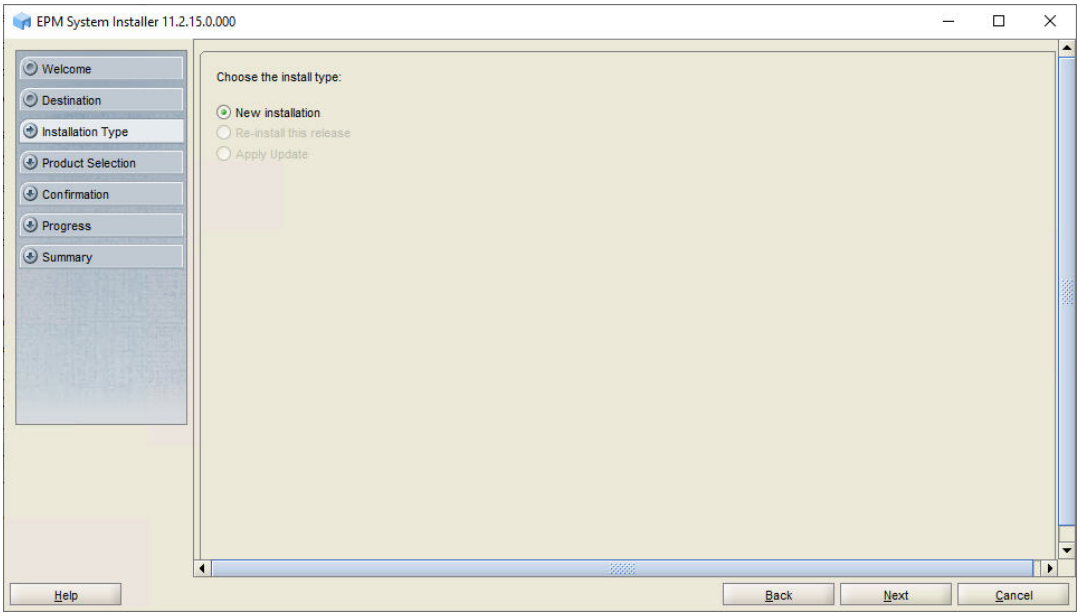
4. In **Welcome**, verify that your system has passed all prerequisite checks, and then click **Next**.



5. If you want to install EPM System software in a location other than the default location, select that location in **Destination**, and then click **Next**.



6. In **Installation Type**, click **Next**.

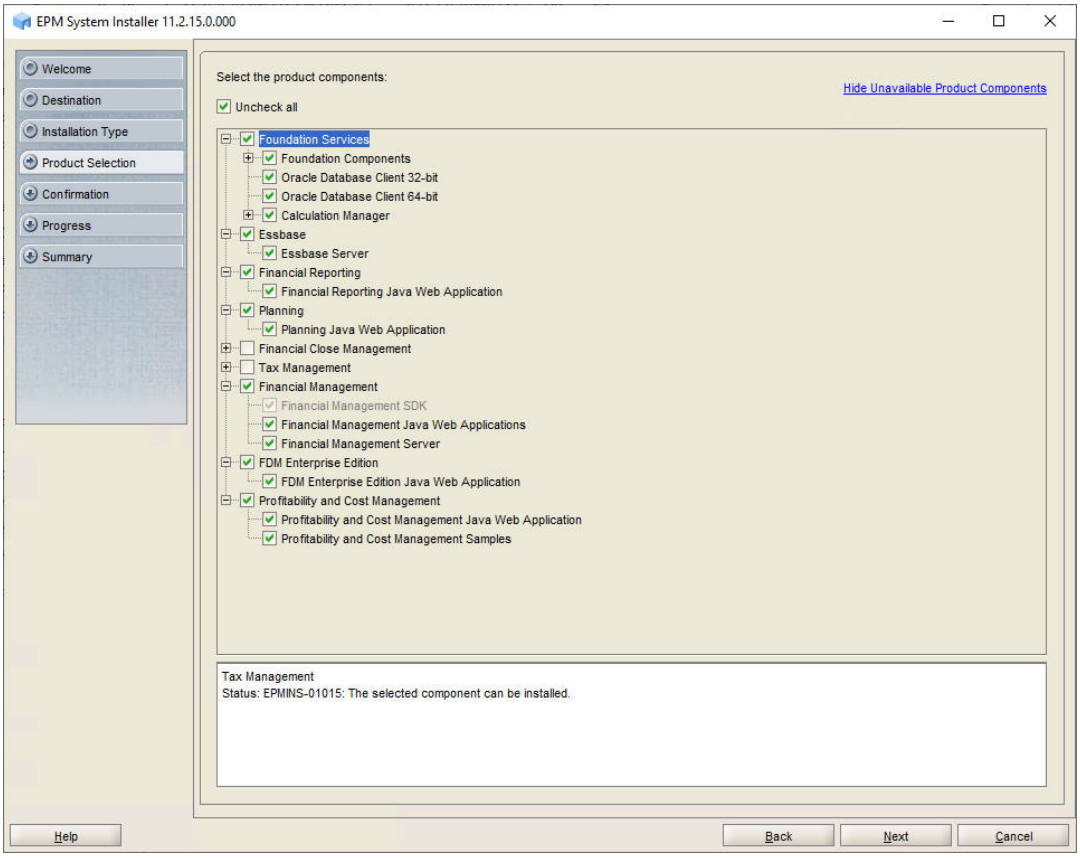


7. In **Product Selection**, clear the selection (uncheck) from **Uncheck all**, and then select the following components:

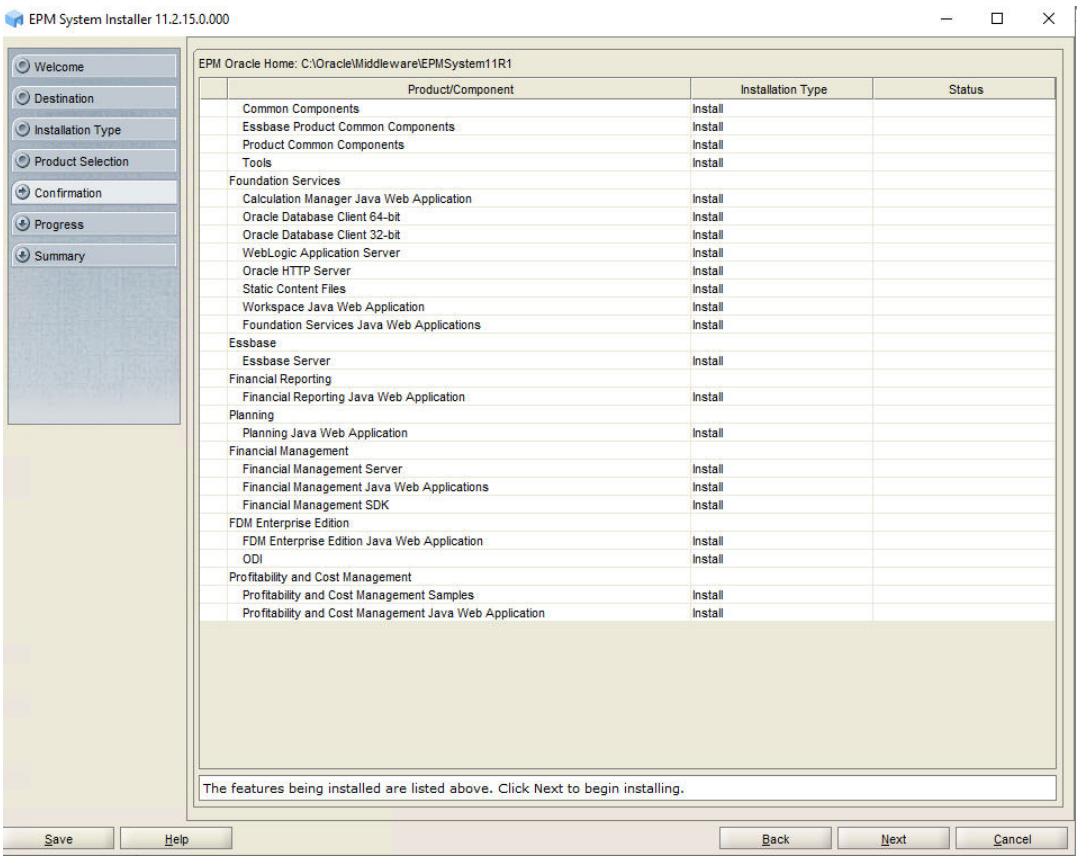
   Although you may not use all these components, installing them prepares the WebLogic domain to host the Java web applications of these components in the future.

   - Foundation Services and all components listed under Foundation Services
   - Essbase—Essbase Server
   - Financial Reporting—Financial Reporting Java Web Application
   - Planning—Planning Java Web Application
   - Financial Management—Financial Management SDK (automatically selected)

- Financial Management—Financial Management Java Web Applications
- FDM Enterprise Edition—FDM Enterprise Edition Java Web Application
- Profitability and Cost Management Java Web Application



8. In **Confirmation**, click **Next** to begin the installation of the selected components on *FNDHOST1*.

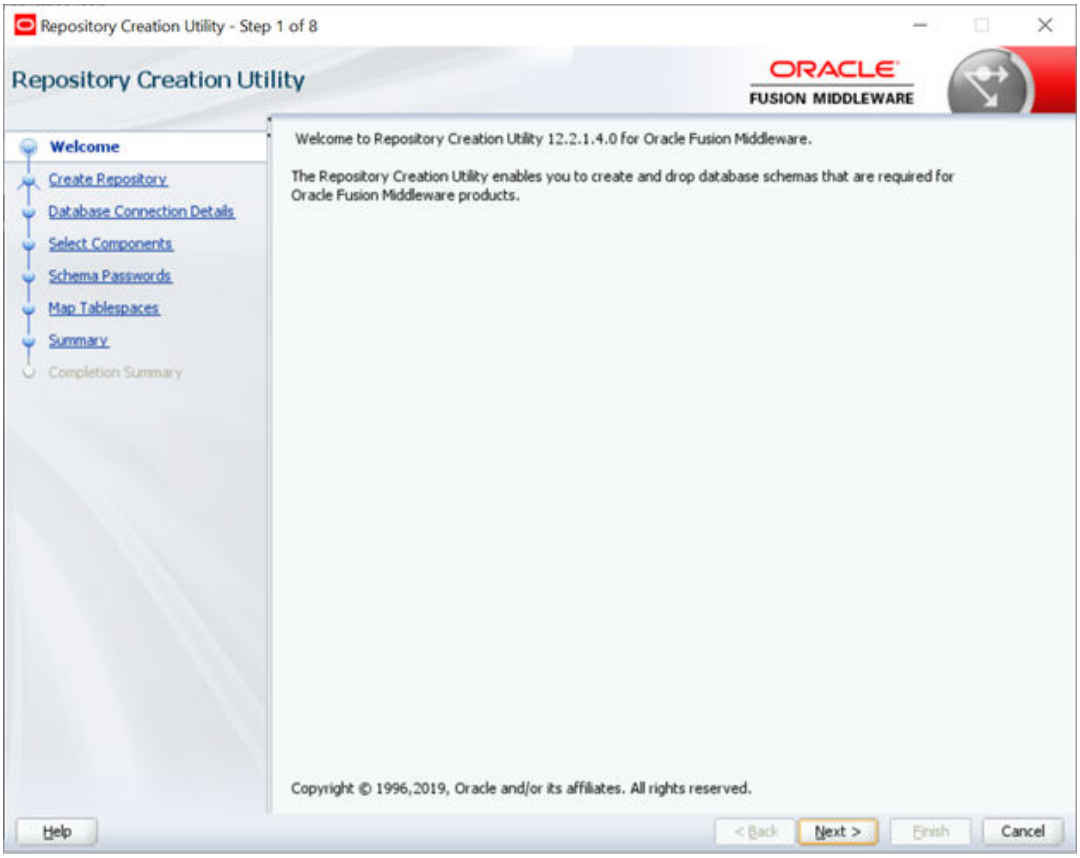


9. In **Summary**, click **Finish** after verifying that all components installed successfully.

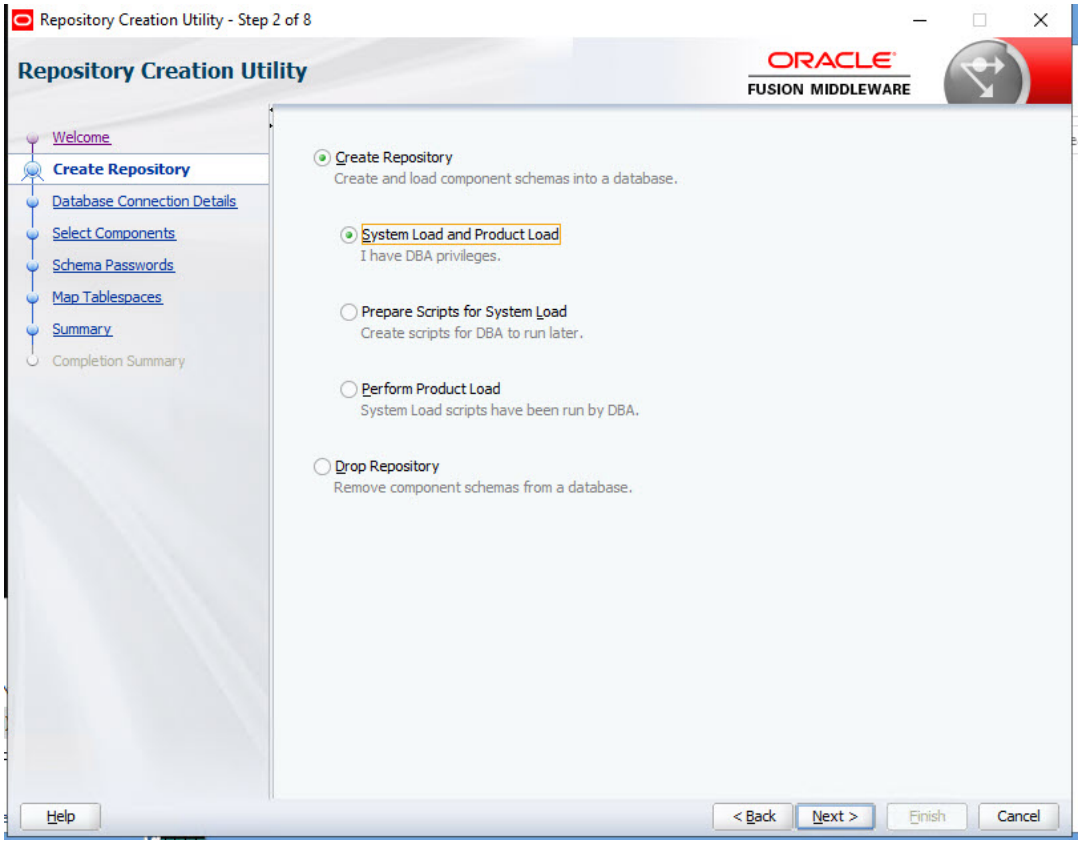
Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1

The Repository Creation Utility (RCU) is used to create schemas to support Oracle Enterprise Performance Management System Java web applications.
To run RCU and update RCU schema properties:

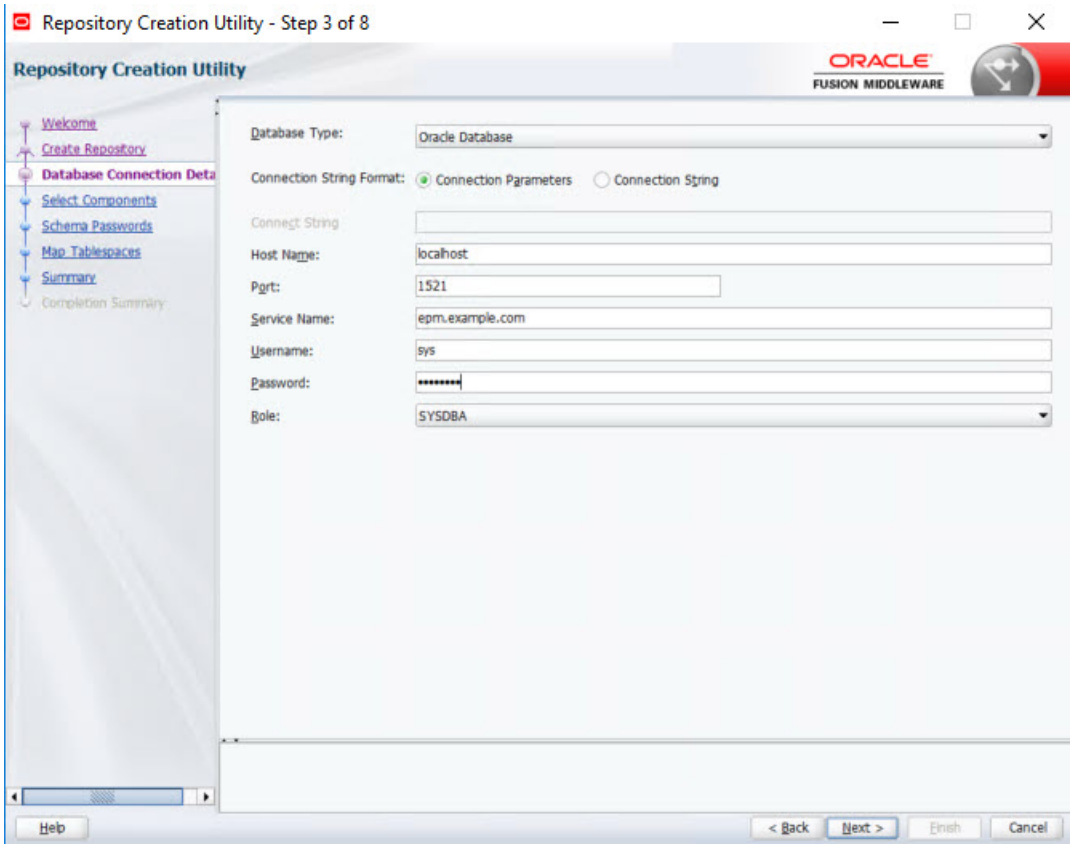
1. Navigate to `<Local Drive>:\Oracle\Middleware\oracle_common\bin` and launch `rcu.bat`.
2. On the **Welcome** page, click **Next**.



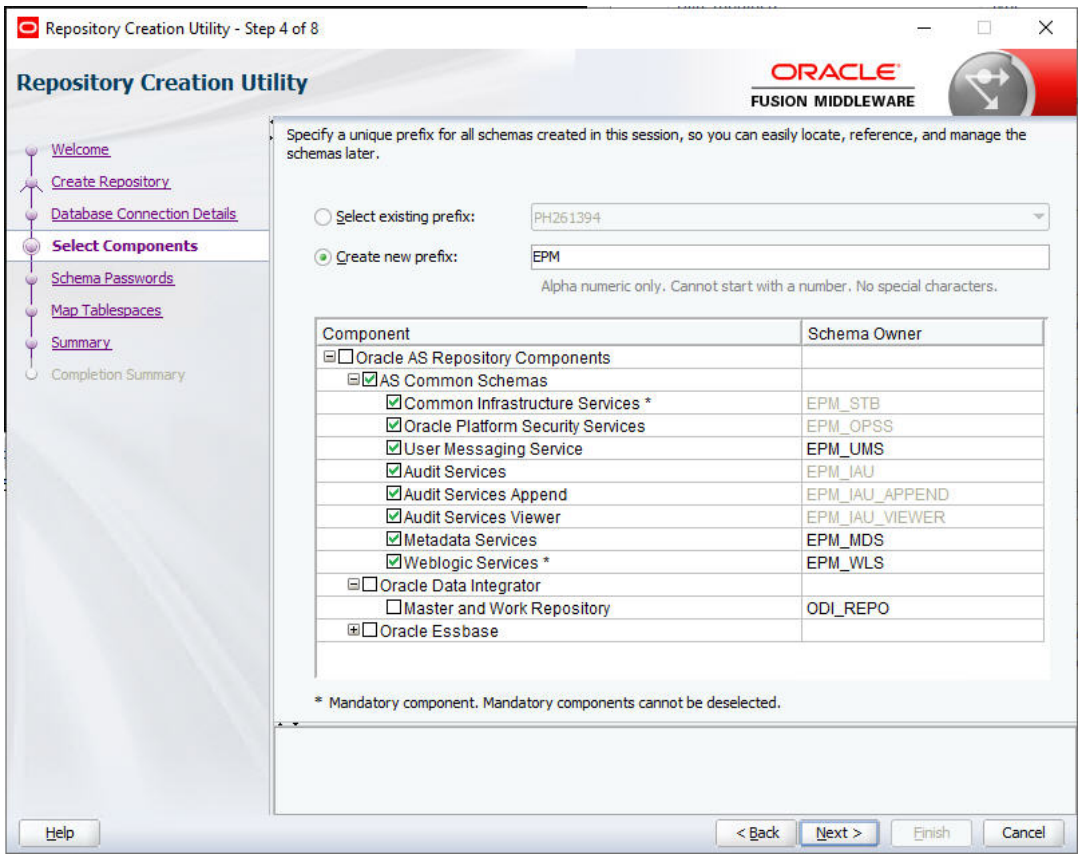
3. In **Create Repository**, click **Create Repository** and **System Load and Product Load**, and then click **Next**.



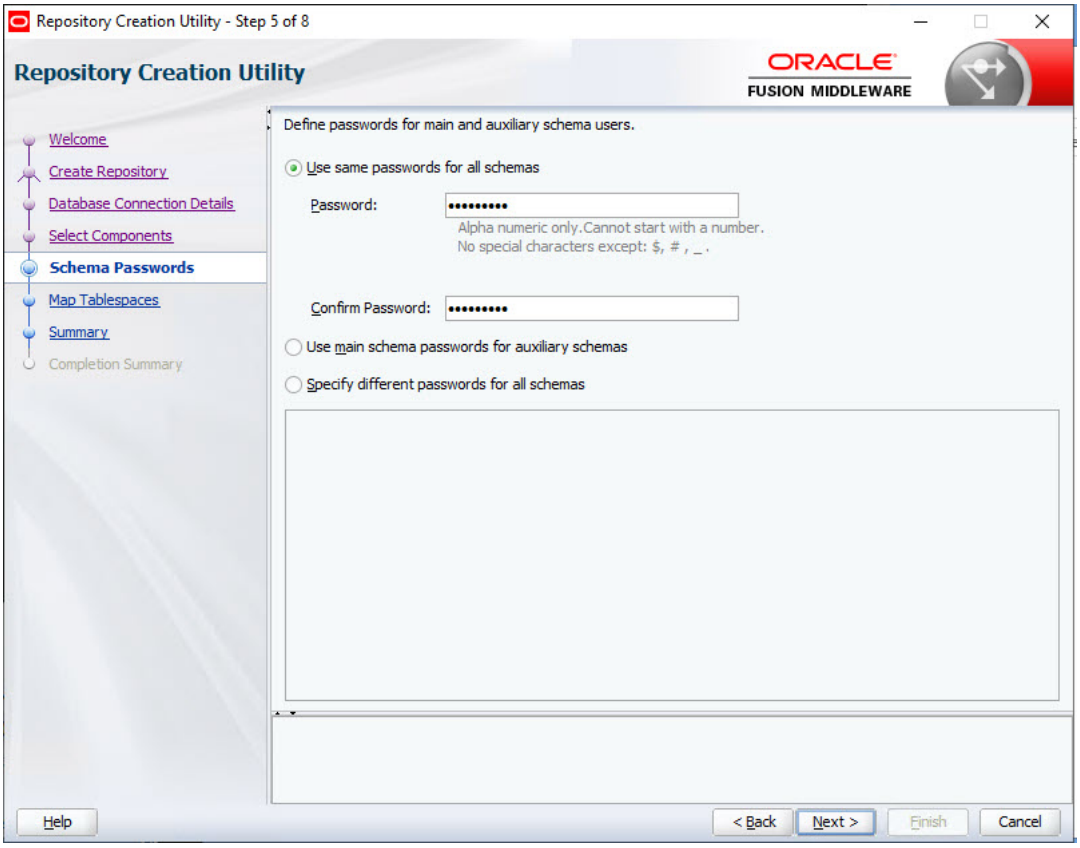
4. On the **Database Connection Details** page, specify a user with DBA or SYSDBA, privileges, such as `sys`, provide the fully qualified service name, and then click **Next**.



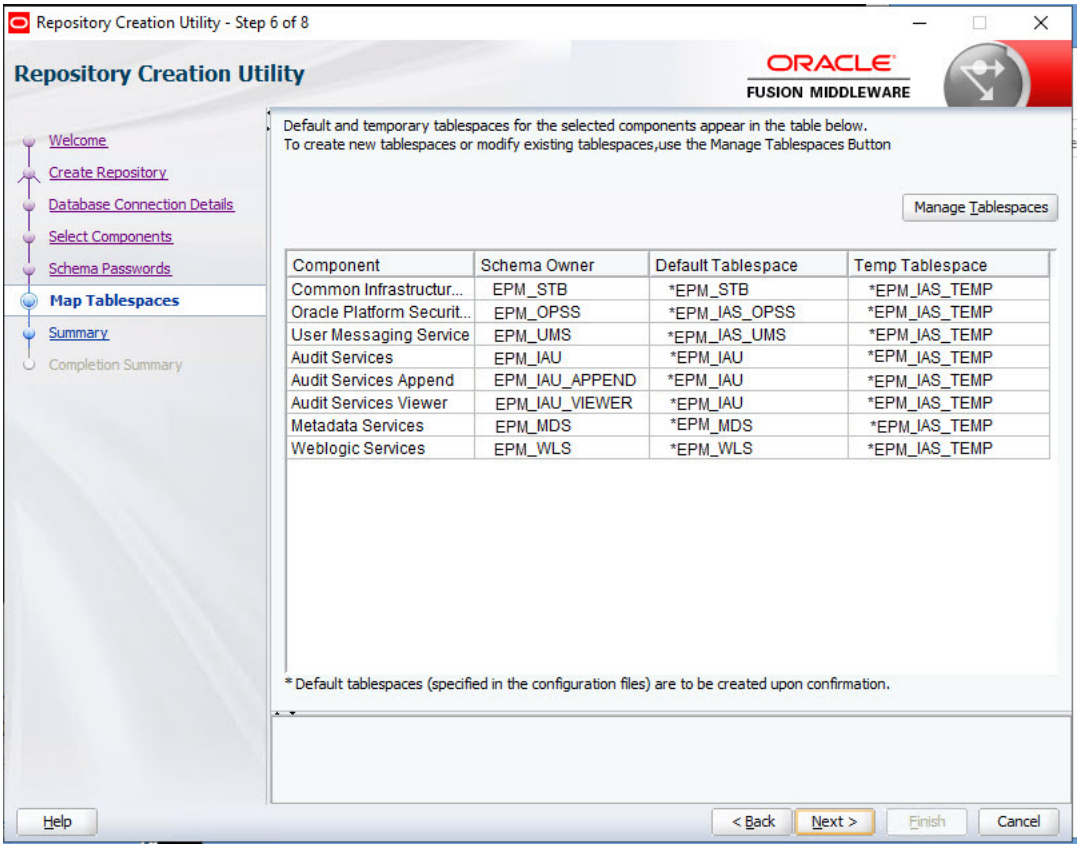
5. On the **Select Components** page, perform these tasks, and then click **Next**:
   - Select **Create new prefix** and provide a prefix. For example, specify `FNDHOST1`.
   - Expand **AS Common Schemas** and select all the options.
     - Clear the selection for **Oracle Data Integrator** if **Oracle Data Integrator** is listed.
     - Clear the selection for **Oracle Essbase** if **Oracle Essbase** is listed.



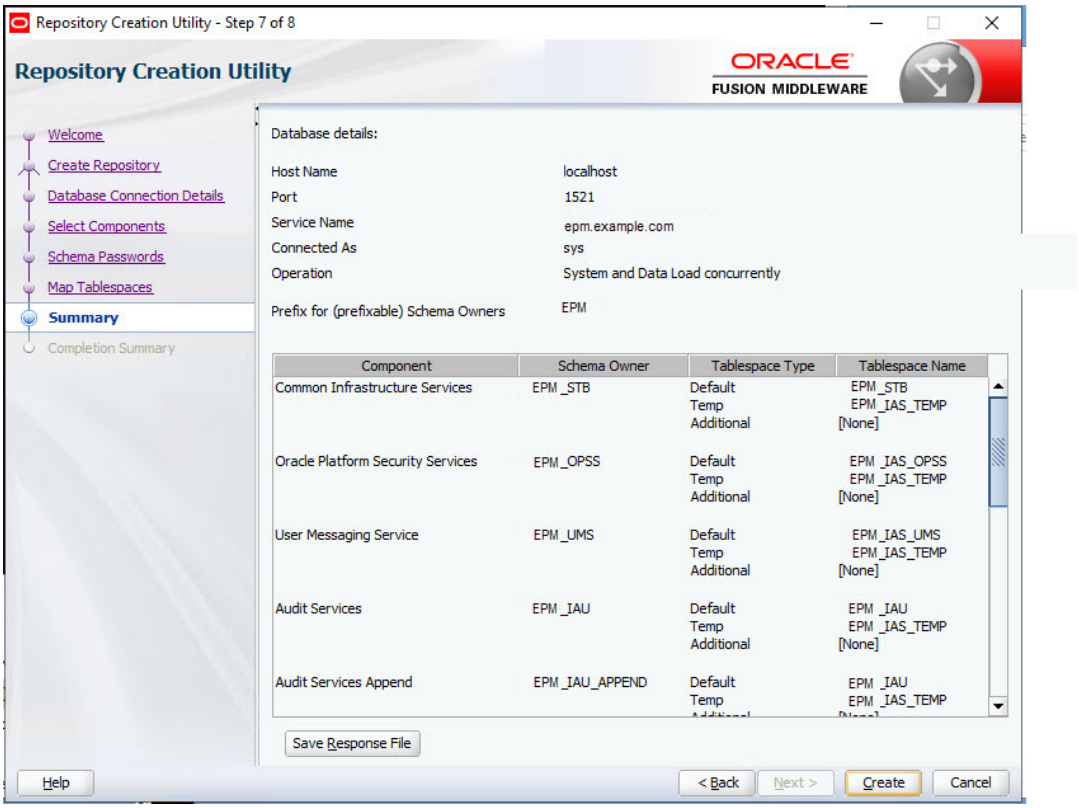
6. On the **Schema Passwords** page, select **Use same passwords for all schemas**. Enter a password in **Password** and **Confirm Password**, make a note of it, and then click **Next**.



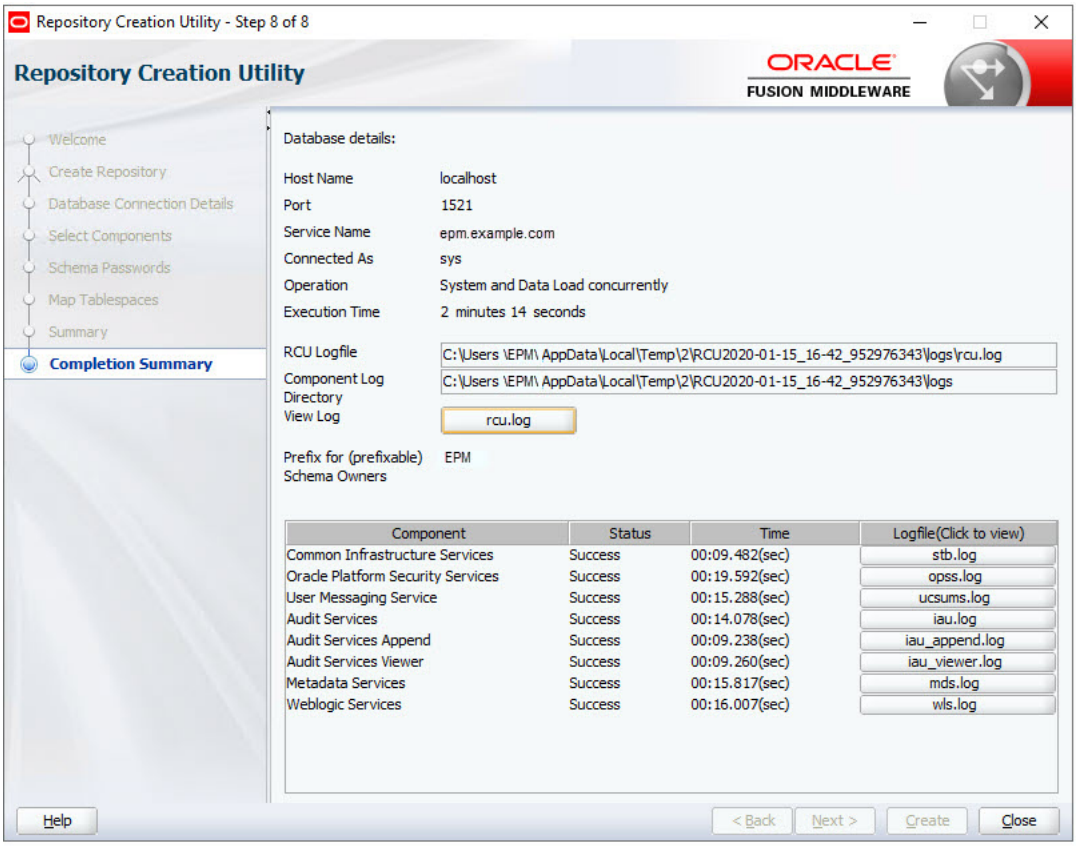
7. On the **Map Tablespaces** page, click **Next**, and then click **OK** to create tablespaces.



8. On the **Summary** page, review the selections, and then click **Create**.



9. On the **Completion Summary** page, click **Close**.

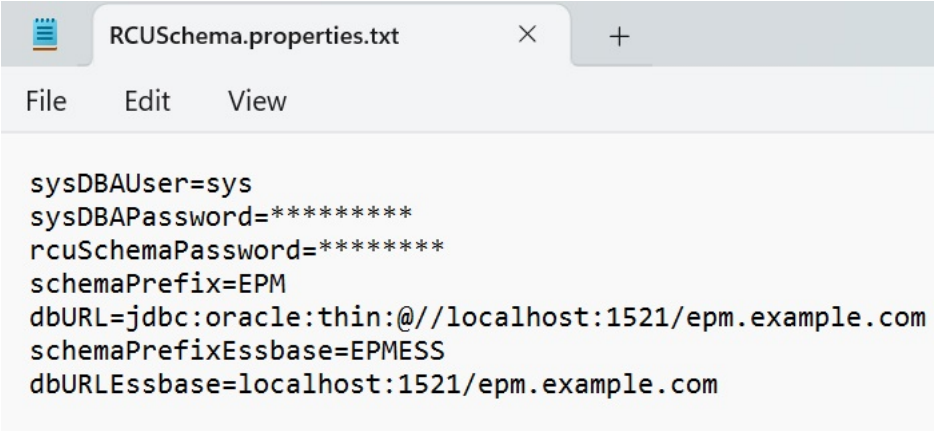


10. Navigate to `<Local Drive>:\Oracle\Middleware\EPMSystem11R1\common\config\11.1.2.0\RCUSchema.properties` and open it in a text editor.

11. Provide the database details and then save the file.

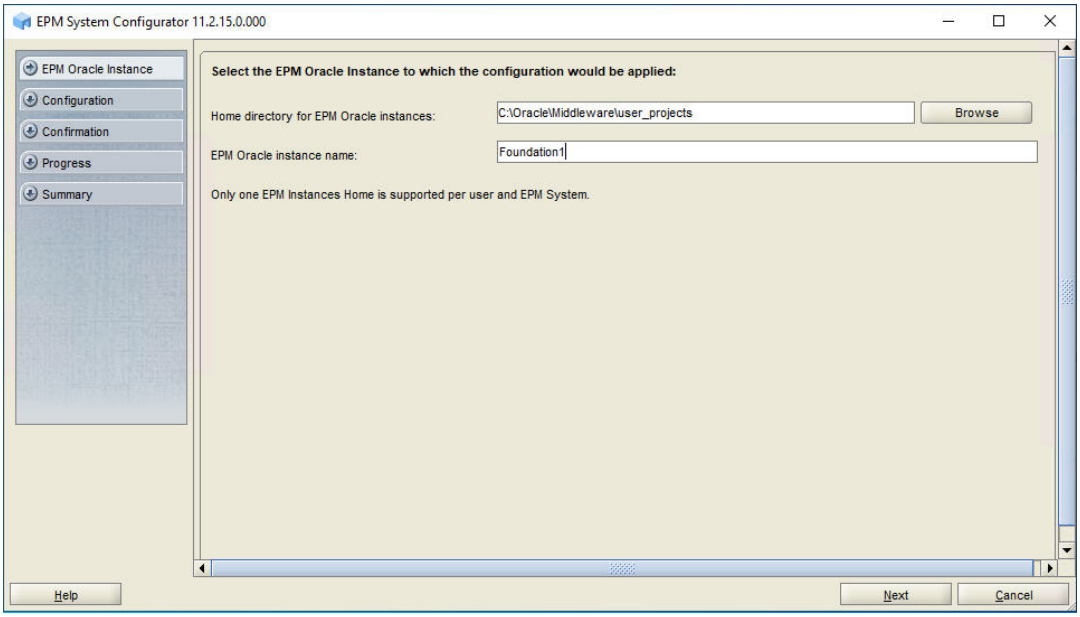
    - **sysDBAUser**—The sysdba user for RCU.
    - **sysDBAPassword**—The sysdba password for RCU.
    - **rcuSchemaPassword**—RCU schema password created while running RCU.
    - **schemaPrefix**—The schema prefix used to create RCU.
    - **schemaPrefixEssbase** —The schema prefix used to create RCU for Essbase.
    - **dbURL**— The database URL.
    - **dbURLEssbase**— The database URL for Essbase.

    See Updating RCU Properties .



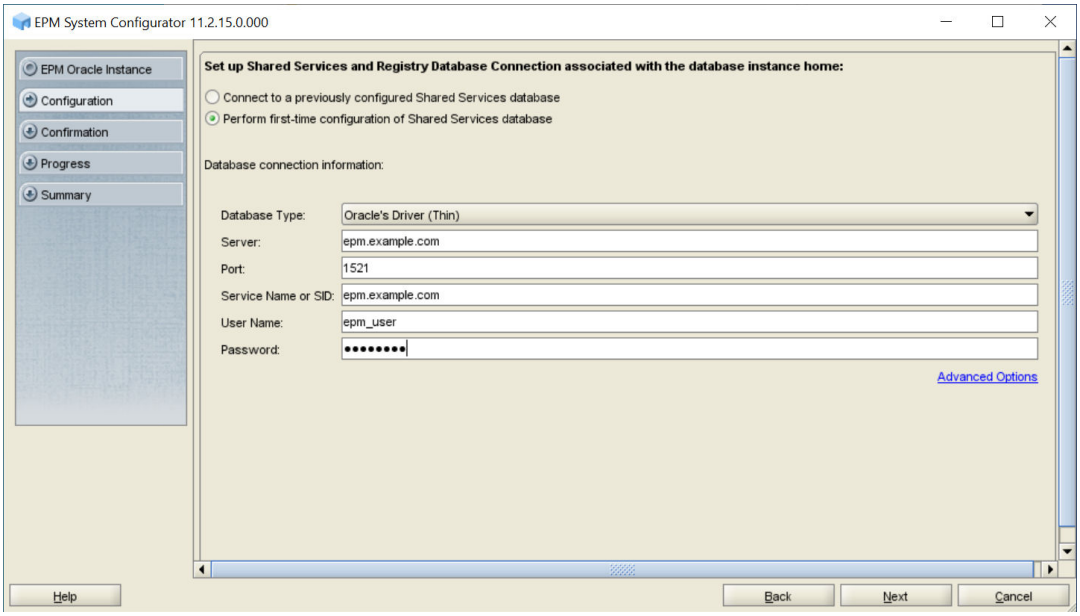
Configuring Foundation Services on FNDHOST1

1. On *FNDHOST1*, launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
2. In **EPM Oracle Instance**, complete these steps, and then click **Next**.
   a. **Optional:** In **Home directory for EPM Oracle instances**, change the location of the EPM Oracle Home directory.
   b. In **EPM Oracle instance name**, enter `Foundation1`.

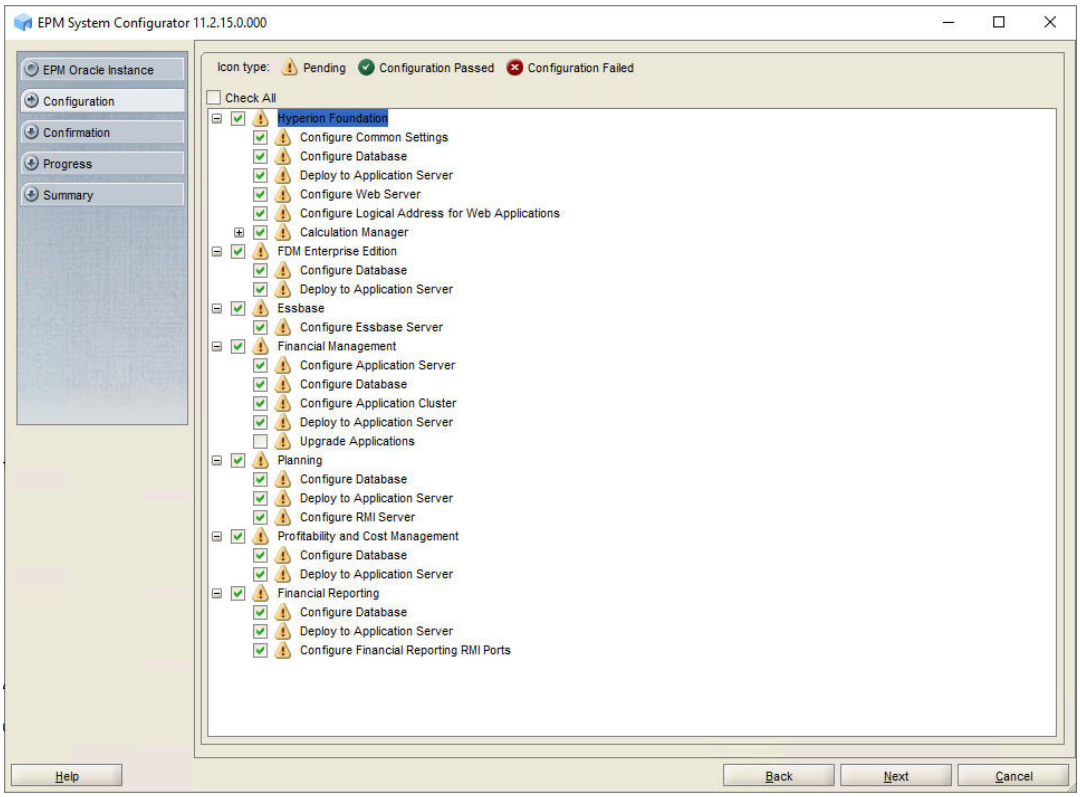


3. On the **Set up Shared Services and Registry Database Connection** screen, enter the connection information for the Oracle Hyperion Shared Services Registry and the user name and password of the database account to use for accessing the database (recorded in Table 1), and then click **Next**.

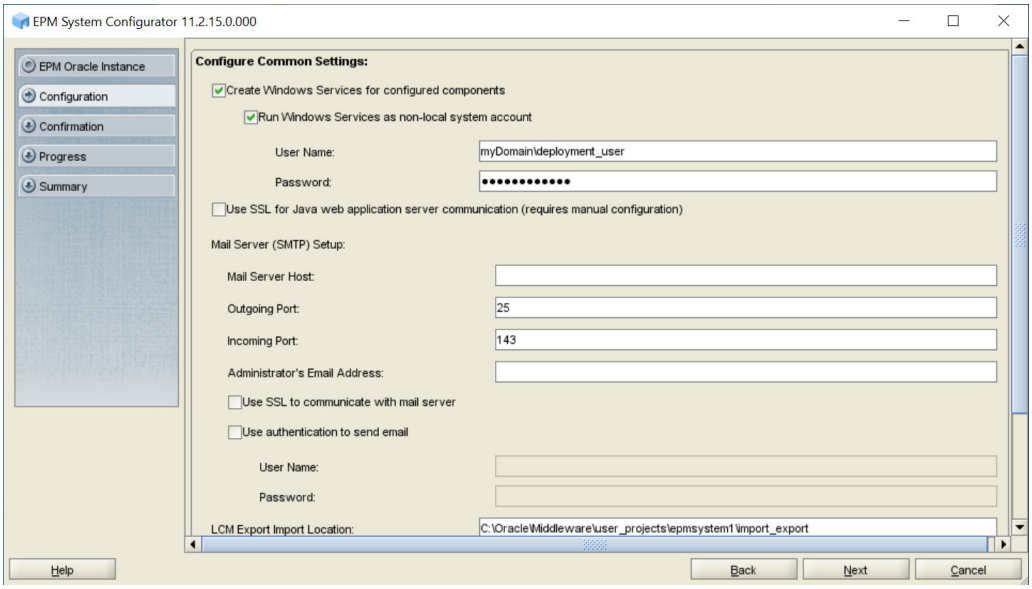
   Shared Services Registry stores the configuration information for all the servers in the deployment so components can find each other.



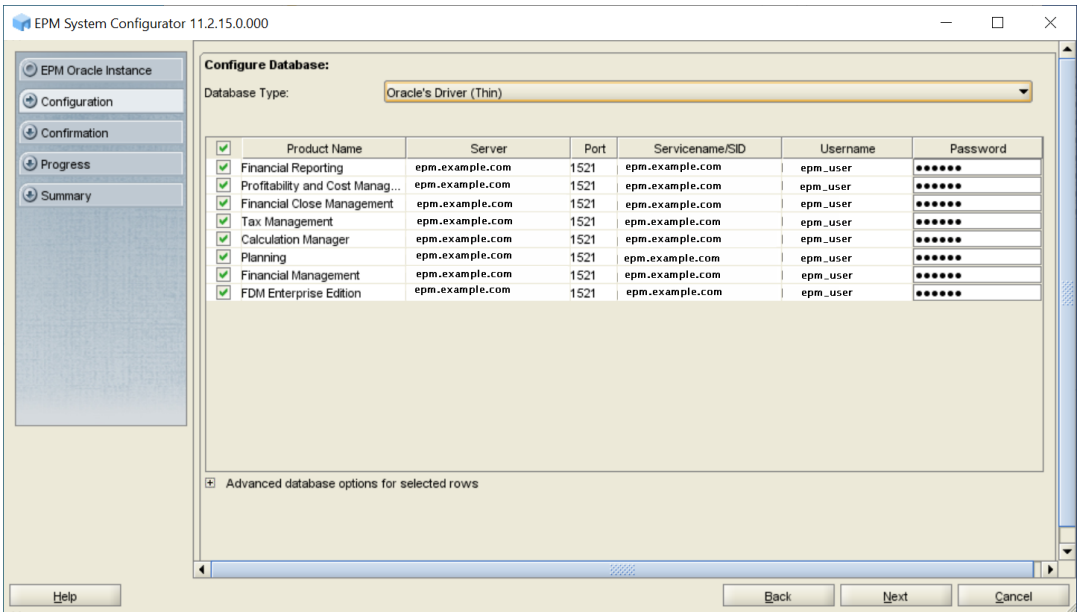
4. In **Configuration**, perform the following tasks, and then click **Next**.
   a. Clear the selection (uncheck) the following components:
      - FDM Enterprise Edition
      - Financial Management
      - Planning
      - Profitability and Cost Management
   b. Expand **Hyperion Foundation**, and then select **Configure Logical Address for Web Applications**.
   c. Clear the selection for **Upgrade Applications** under **Financial Management**.
   d. Ensure that your selections match the image:



5. 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 Oracle Hyperion Foundation Services instance. EPM System Configurator creates this directory for you.
   e. **Optional:** Enter SMTP mail server information.



6. In **Configure Database**, click **Next** to use the default values to leverage the Foundation Services database for all the products.

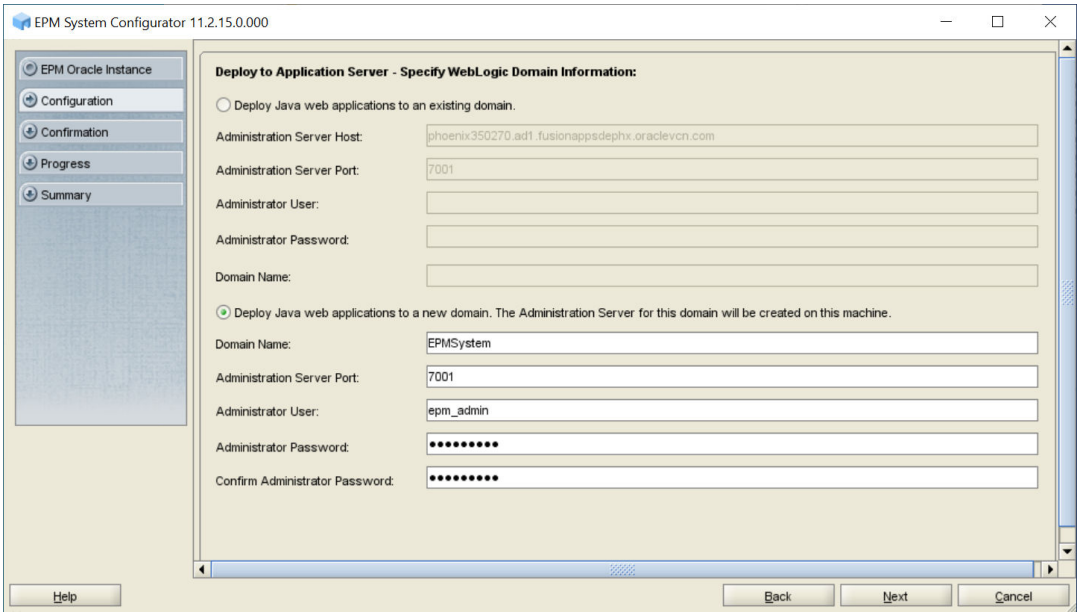


7. In **Deploy to Application Server - Specify WebLogic Domain Information**, enter the required information, and then click **Next**.

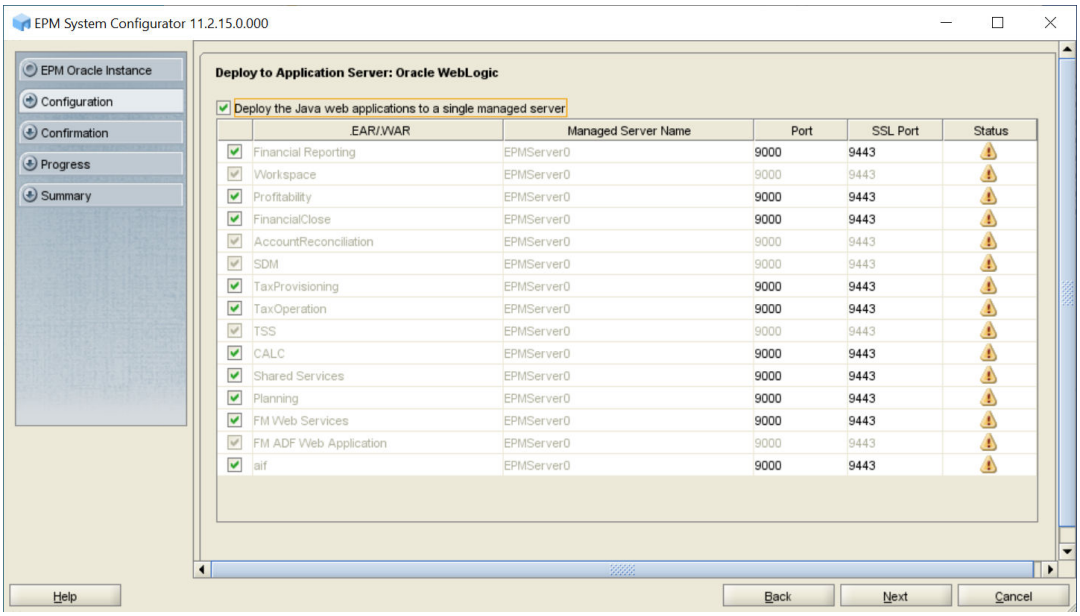
   The Oracle WebLogic Server domain for Oracle Enterprise Performance Management System components and the WebLogic administration server are created on this machine.

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

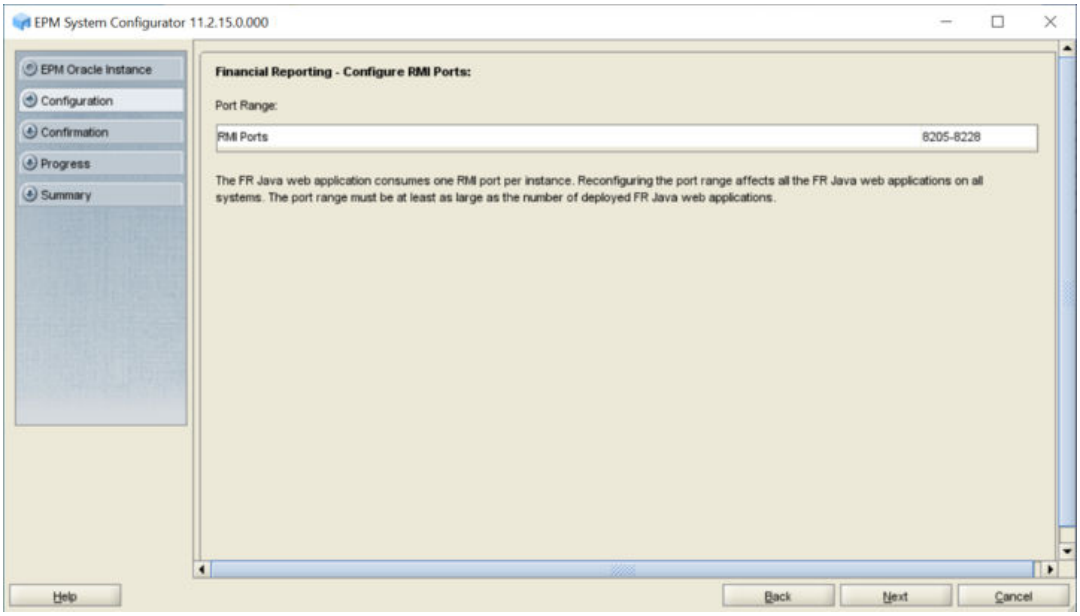
   b. In **Administrator Password** and **Confirm Administrator Password**, enter the password for WebLogic Server administrator, using the system administrator password you identified.



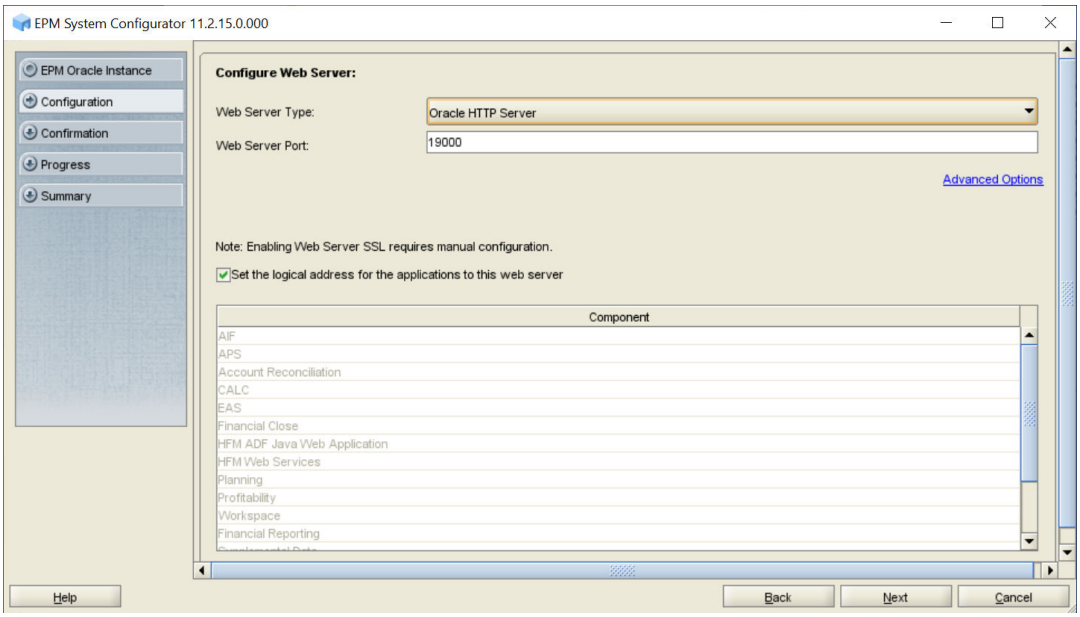
8. In **Deploy to Application Server: Oracle WebLogic**, review the list of web applications that will be deployed to the WebLogic Server domain, select **Deploy the Java web applications to a single managed server**, and then click **Next**. The Java web applications listed on this screen are deployed to one managed server.



9. In **Financial Reporting – Configure RMI Ports**, click **Next**.

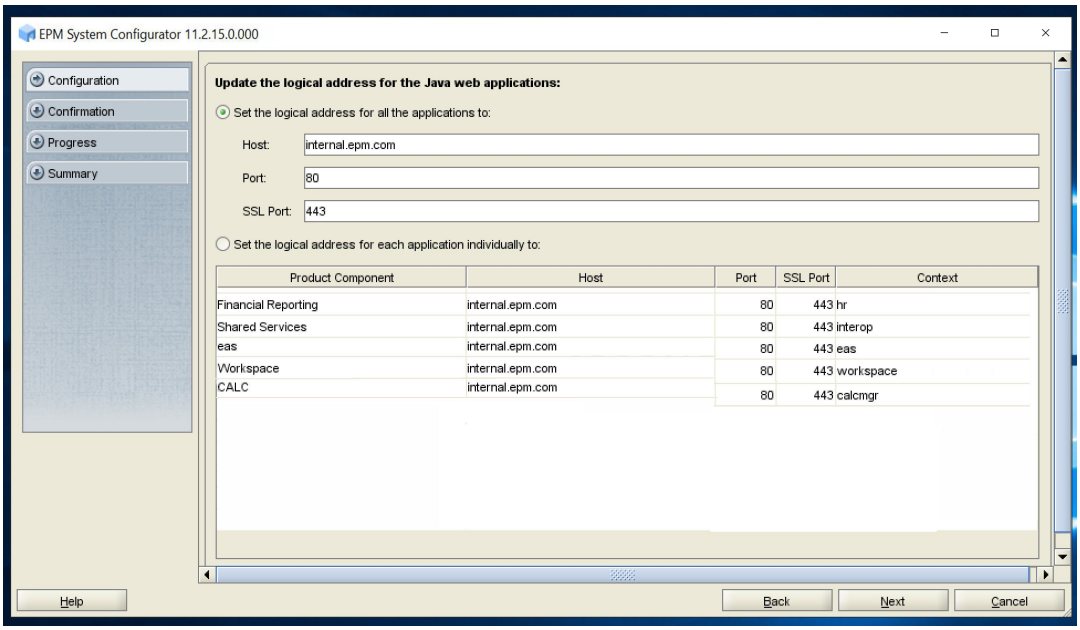


10. In **Configure Web Server**, complete these steps, and then click **Next**.
    a. In **Web Server Type**, select **Oracle HTTP Server**.
    b. **Optional:** In **Web Server Port**, change the web server port number.
    c. Click **Advanced Options** and specify the shared drive on which to configure Oracle HTTP Server (you must configure at the root of the shared drive), click **OK**, and then click **Next**.

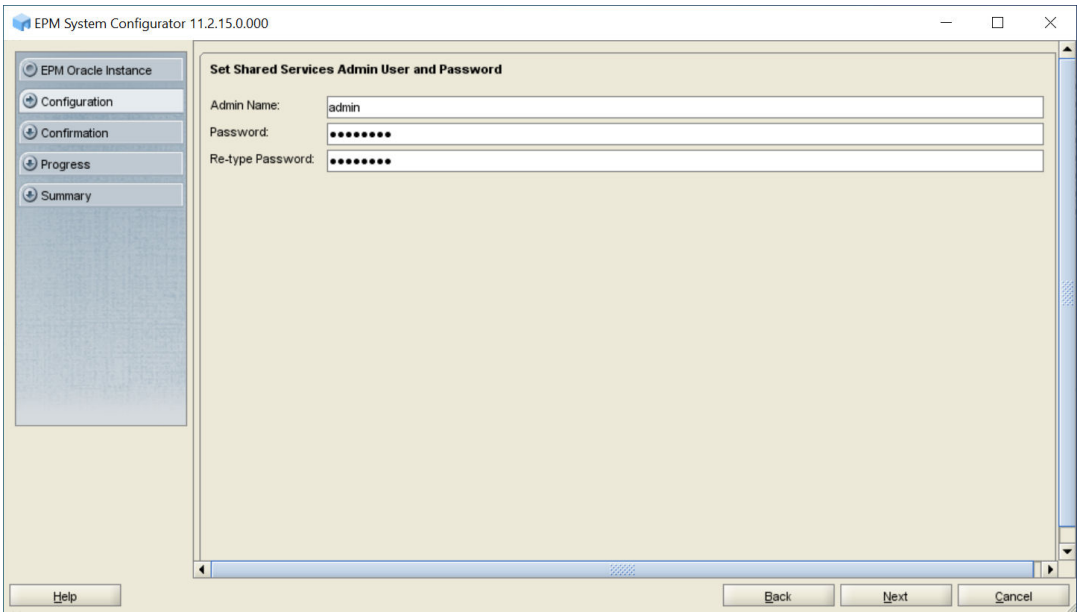


11. In **Update the logical address for the web applications**, complete these steps, and then click **Next**.
    a. In **Host**, enter the name of the virtualhost (`epminternal.`*`mycompany`*`.com`) that you created for internal communication

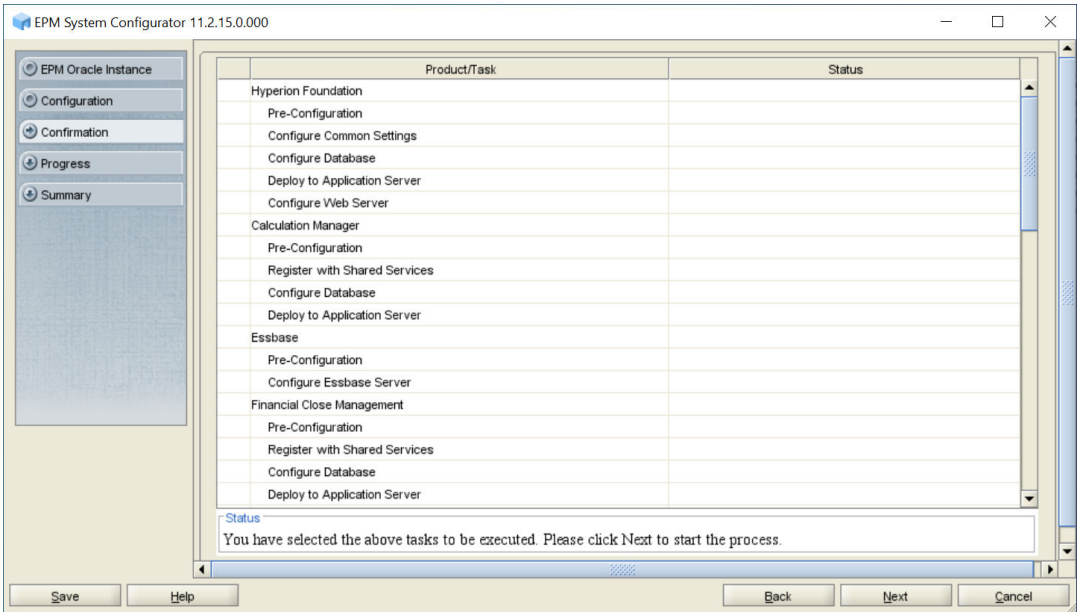
b. **Optional:** In **Port** and **SSL Port**, change port numbers.



12. 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**.



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 WebLogic Administration Server: Launch `<Local Drive>:/Oracle/Middleware/user_projects/domains/EPMSystem/bin/startWeblogic.cmd`.
16. Start EPM System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.
17. Validate the installation by logging on to Oracle Hyperion Enterprise Performance Management Workspace: From the **Start** menu, select **Oracle EPM System**, and then **Workspace URL**, and then click **Launch Application**. Or you can access the following URL:

    `http://FNDHOST1:19000/workspace/`

18. 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 on ESSHOST1

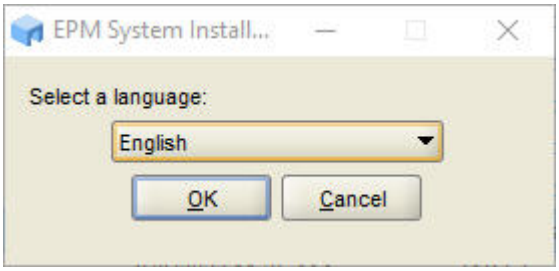
- Installing Essbase Server
- Creating Infrastructure Schemas Using Repository Creation Utility (RCU)
- Configuring Essbase Server

Installing Essbase Server on ESSHOST1

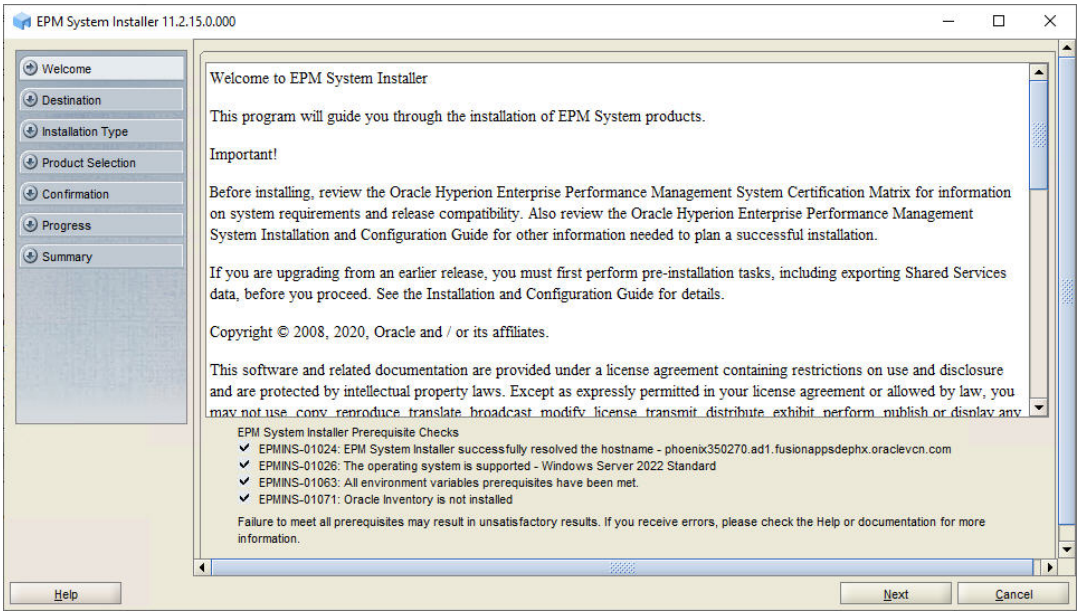
To install Oracle Essbase on *ESSHOST1*:

> **Note:**
>
> If you are using Windows 2016, refer to the post configuration information under the *Oracle Hyperion Technology* section in the Known Issues in 11.2.15 topic to enable support for Windows 2016 on Oracle Essbase 21c embedded with EPM 11.2.15.

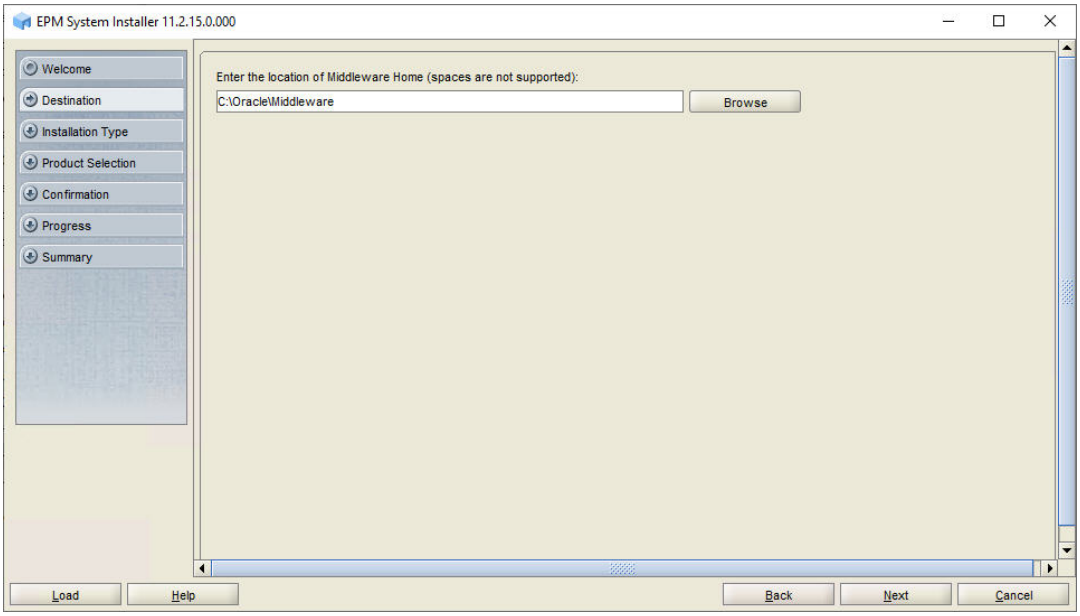
1. Log on to the Essbase host machine (*ESSHOST1*) as the deployment user, and define a network drive (for example, `Z:/`) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, `//sharedhost/sharedlocation/downloads/epm_unzipped`).
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: `<Local Drive>:/epm_data`.
3. From the mapped network drive, launch `installTool.cmd`.
4. In EPM System Installer, select a language, and then click **OK**.



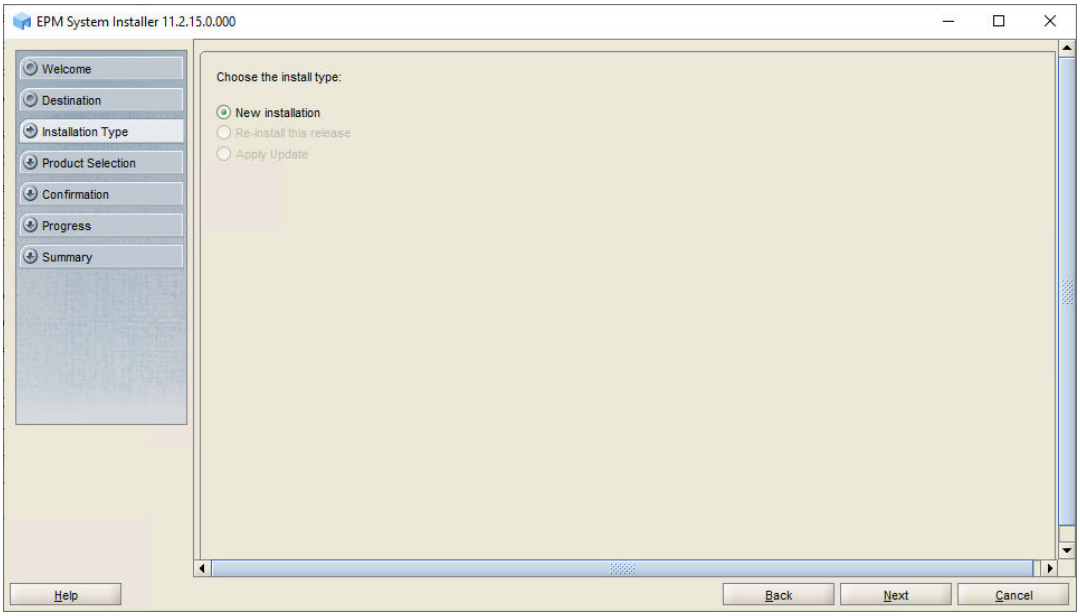
5. In **Welcome**, verify that your system has passed all prerequisite checks, and then click **Next**.



6. In **Destination**, specify the *MIDDLEWARE_HOME* directory location exactly as set while deploying Oracle Hyperion Foundation Services on *FNDHOST1*, and then click **Next**.



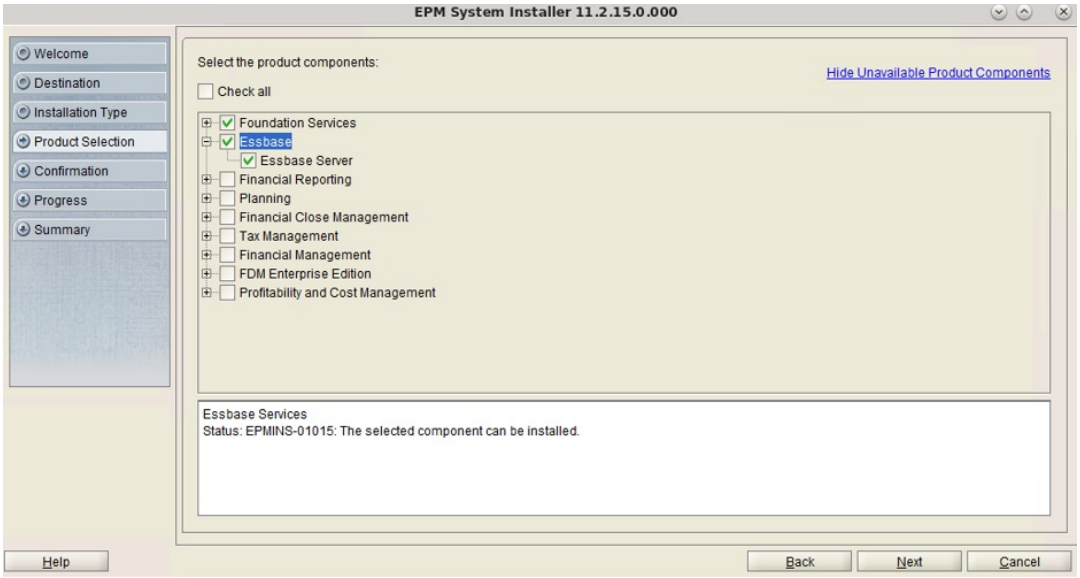
7. In **Installation Type**, click **Next**.



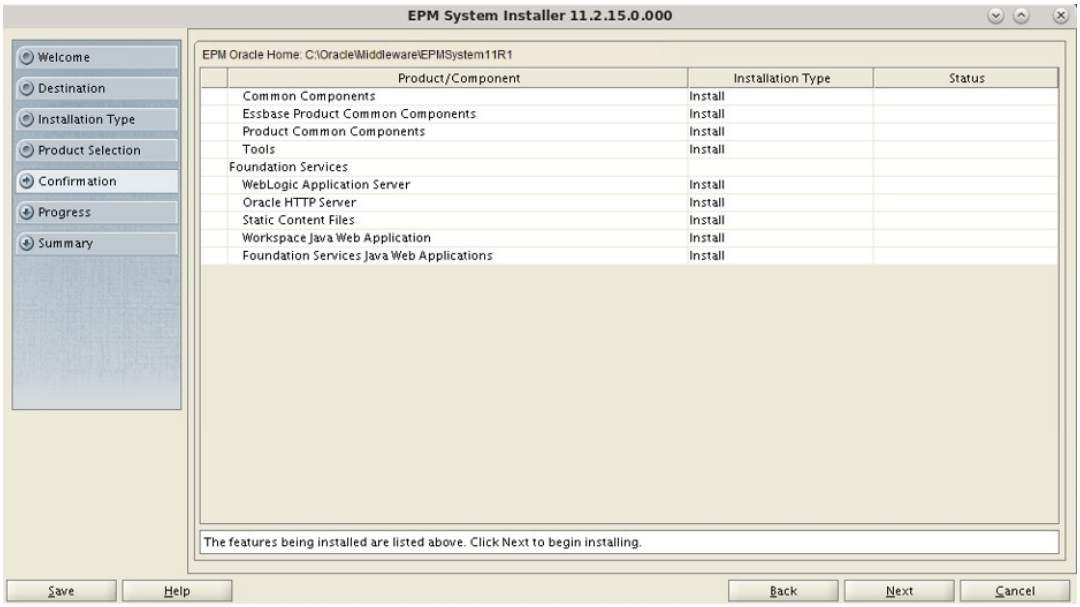
8. In **Product Selection**, clear the selection (uncheck) from **Uncheck All**, and select the following component:

   Essbase Server under **Essbase**.

   Any required **Foundation Services** components are automatically selected.



9. In **Confirmation**, click **Next** to begin the installation of the selected components on *ESSHOST1*.



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

Creating Infrastructure Schemas Using Repository Creation Utility on ESSHOST1

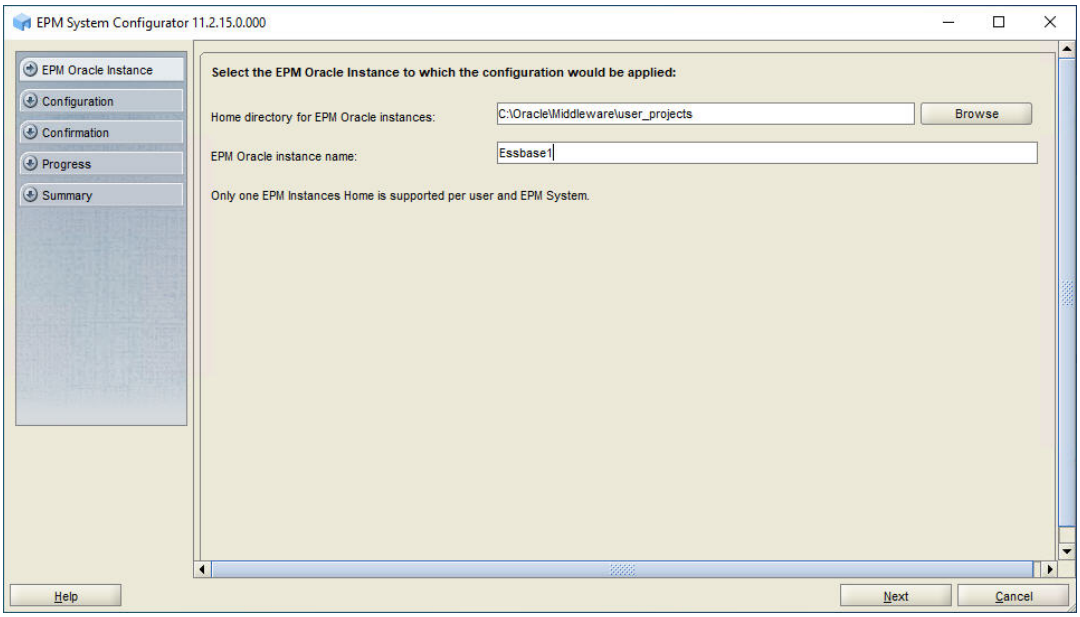
1. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility.

   On the **Select Components** page, enter a unique prefix, for example `ESSHOST1`.

2. When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `ESSHOST1`.

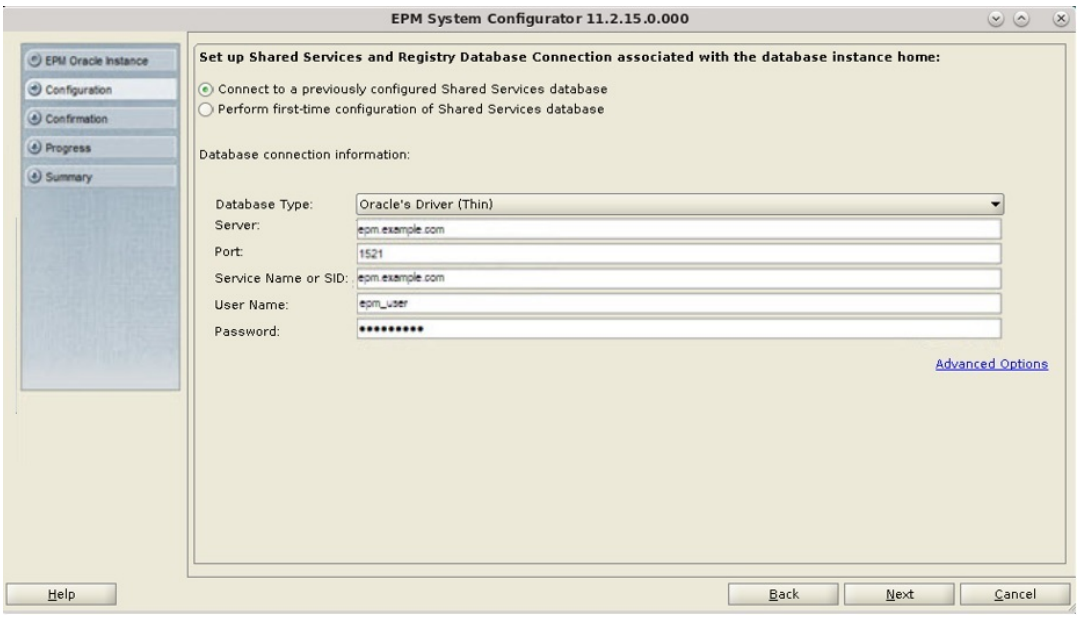
Configuring Essbase on ESSHOST1

1. If you are using Windows 2016, refer to the post-configuration information under the *Oracle Hyperion Technology* section in the Known Issues in 11.2.15 topic to enable support for Windows 2016 on Oracle Essbase 21c embedded with EPM 11.2.15.
2. On *ESSHOST1*, launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
3. In **EPM Oracle Instance**, complete these steps, and then click **Next**.
   a. In **Home directory for EPM Oracle instances**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Oracle Hyperion Foundation Services (on *FNDHOST1*).
   b. In **EPM Oracle instance name**, enter `Essbase1`.

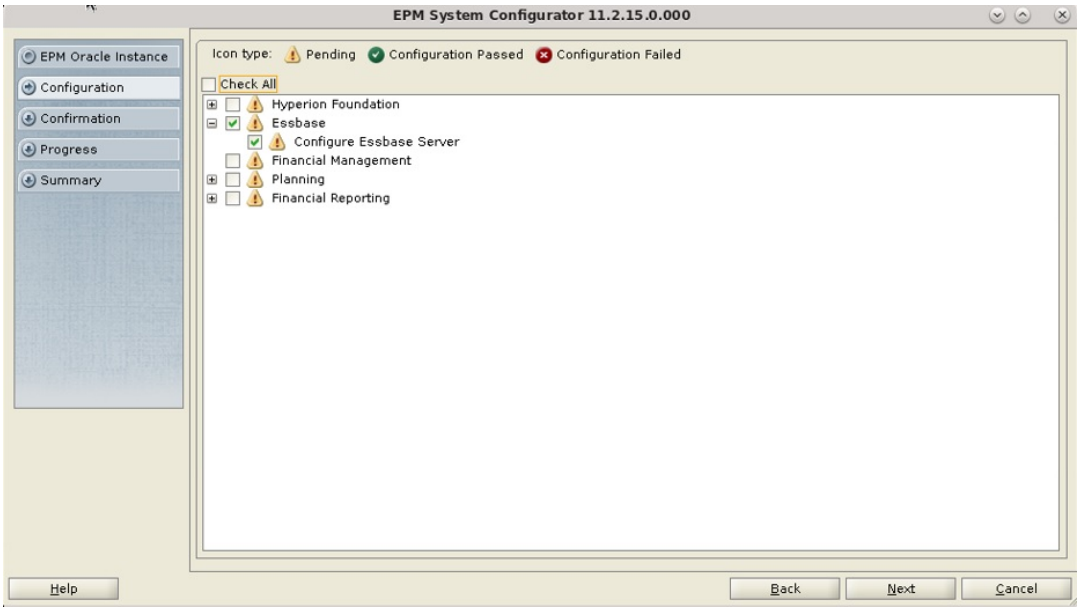


4. If you installed Oracle Essbase on the same server as Foundation Services, skip this step. Otherwise, on the **Set up Shared Services and Registry Database Connection** screen, select **Connect to a Previously Configured Shared Services Database**, enter the connection information for the Oracle Hyperion Shared Services Registry database and the user name and password of the database account to use for accessing the database (recorded in Table 1), 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*).

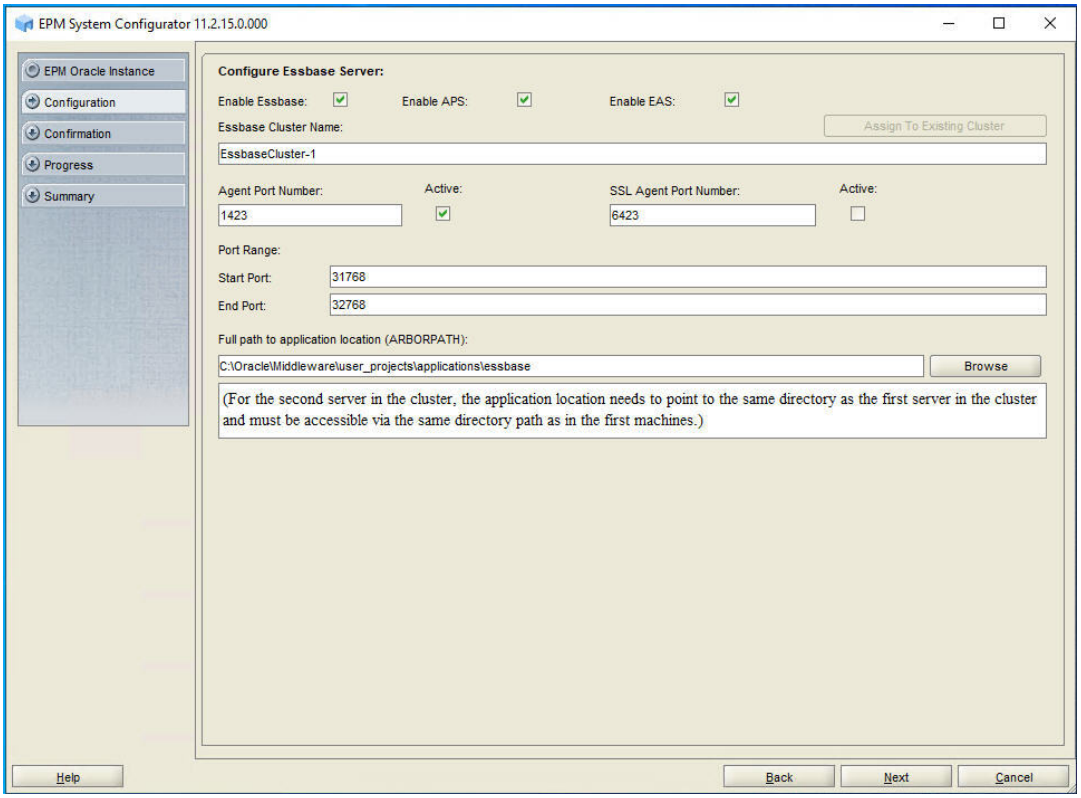


5. On the **Configuration** screen, clear the selection (uncheck) from **Uncheck All**, expand **Essbase**, select **Essbase**, and then click **Next**.

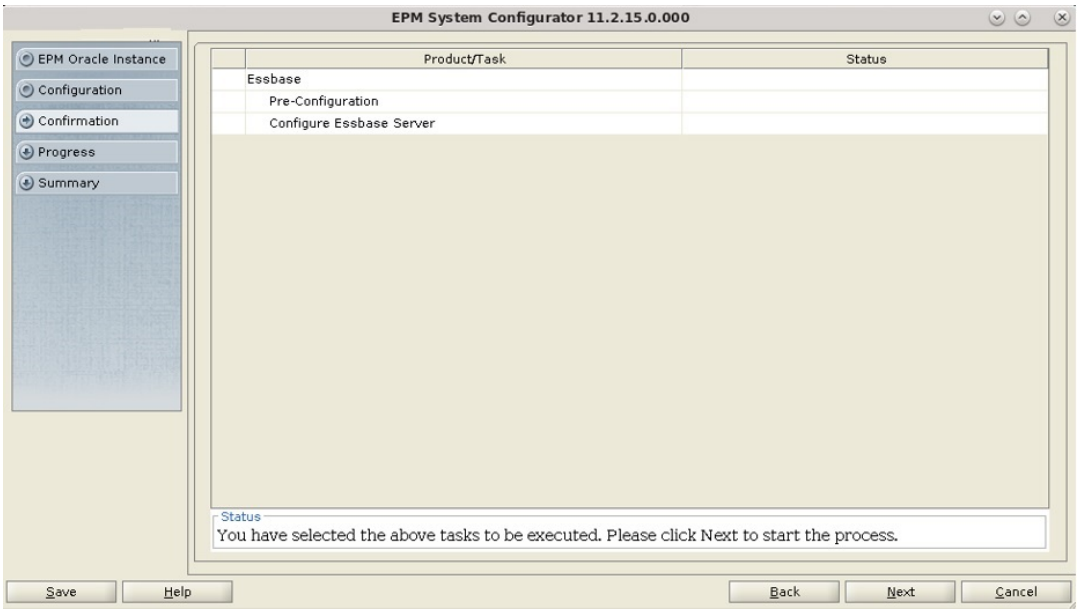


6. In **Configure Essbase Server**, in **Full Path to Application Location (ARBORPATH)**, specify the directory that you created for data, for example: `<Local Drive>:/epm_data`, and then click **Next**.

   For more information on Essbase Configuration Settings and options, see Essbase Server Configuration table and Essbase Configuration Settings.



7. In **Confirmation**, review the summary of the configuration tasks that will be executed, and then click **Next**.



8. When the deployment process is complete, the **Summary** screen is displayed. Verify that all the tasks completed successfully, and then click **Finish**.

9. On *ESSHOST1*, start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

Installing and Configuring Planning on PLANHOST1

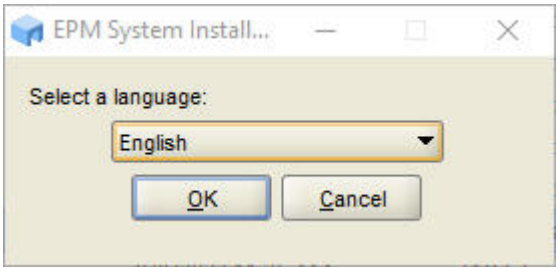
- Installing Planning
- Creating Infrastructure Schemas Using Repository Creation Utility (RCU)
- Configuring Planning

Installing Planning on PLANHOST1

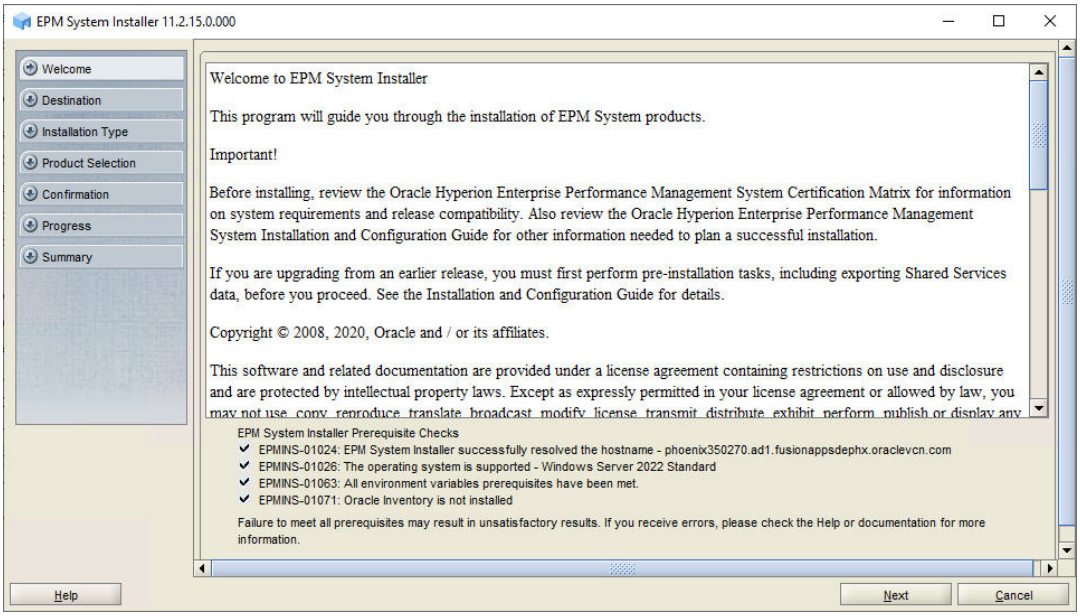
If you are configuring the Oracle Hyperion Planning instance on the same server on which you configured the Oracle Hyperion Foundation Services instance, you can skip the installation steps and RCU steps and go directly to the configuration steps. See Configuring Planning on PLANHOST1.

To install Planning on *PLANHOST1*:

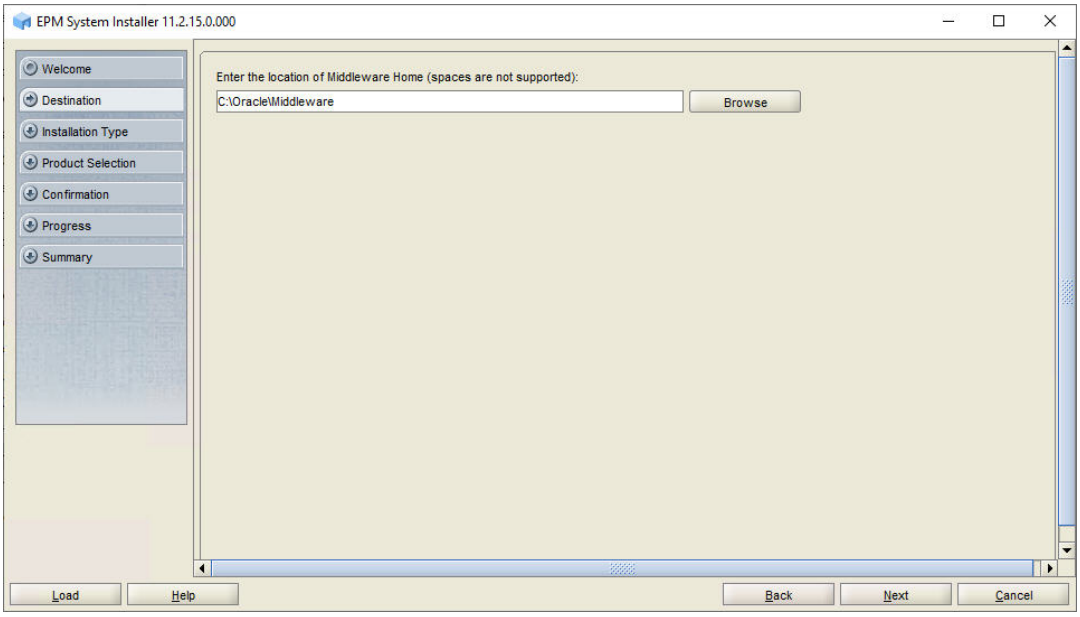
1. Log on to the Planning host machine (*PLANHOST1*) as the deployment user, and define a network drive (for example, `Z:/`) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, `//sharedhost/sharedlocation/downloads/epm_unzipped`).
2. From the mapped network drive, launch `installTool.cmd`.
3. In EPM System Installer, select a language, and then click **OK**.



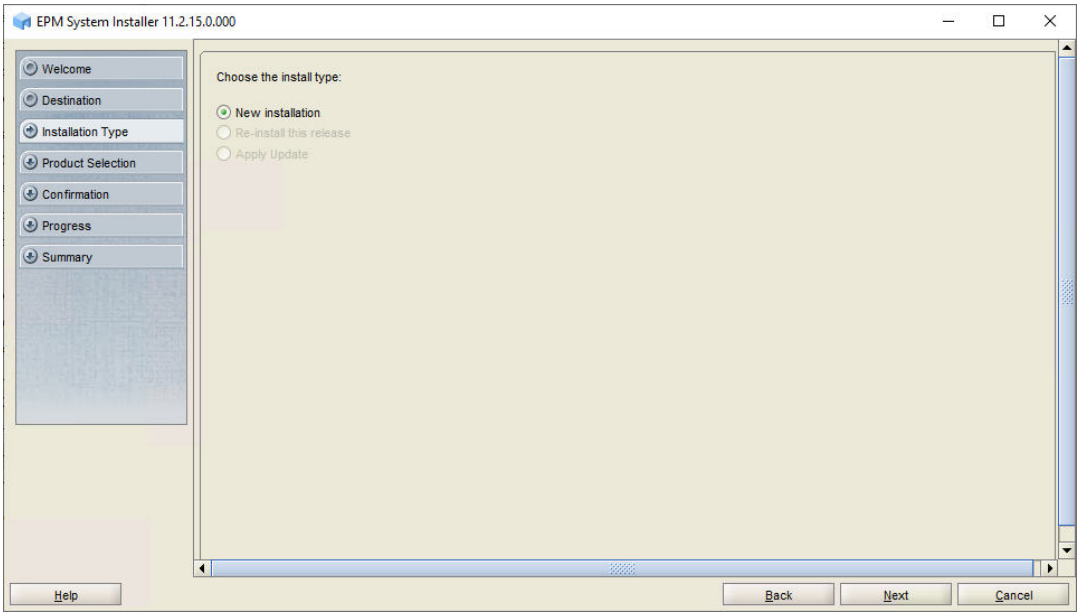
4. In **Welcome**, verify that your system has passed all prerequisite checks, and then click **Next**.



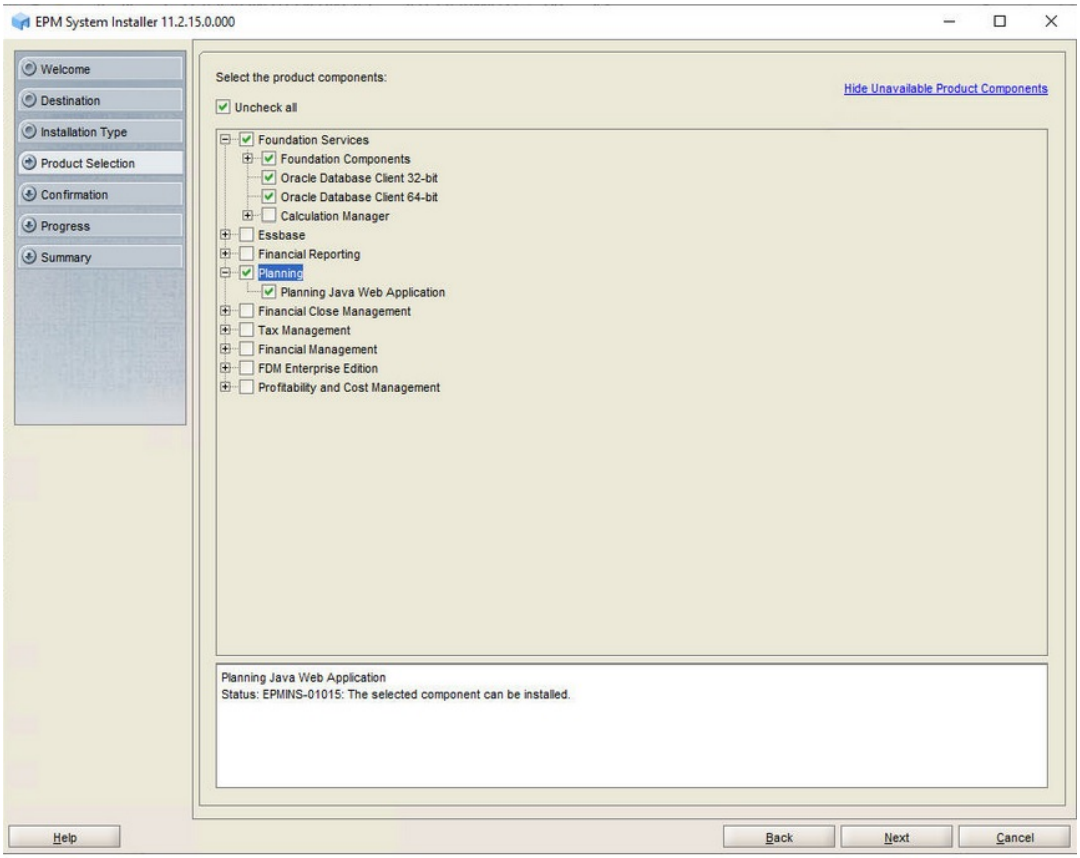
5. In **Destination**, specify the *MIDDLEWARE_HOME* directory location exactly as set while deploying Foundation Services on *FNDHOST1*, and then click **Next**.



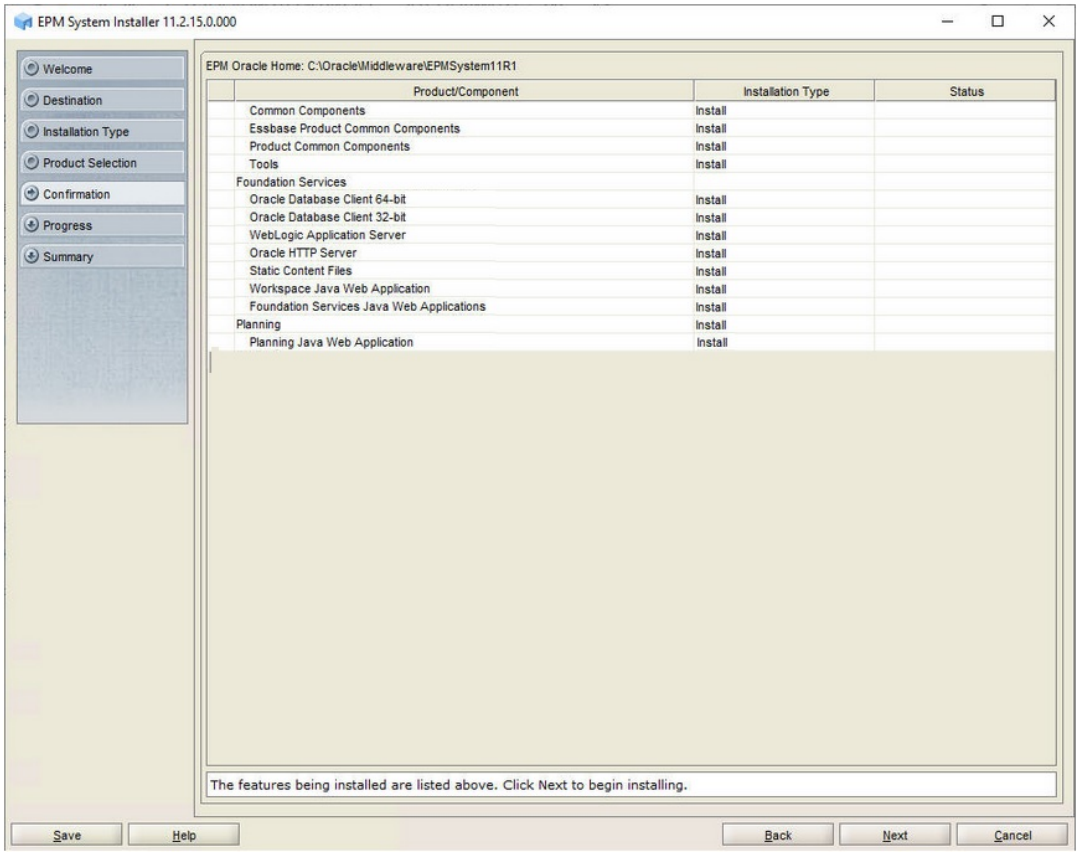
6. In **Installation Type**, click **Next**.



7. 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.



8. In **Confirmation**, click **Next** to begin the installation of the selected components on *PLANHOST1*.



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

Creating Infrastructure Schemas Using Repository Creation Utility on PLANHOST1

1. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility.

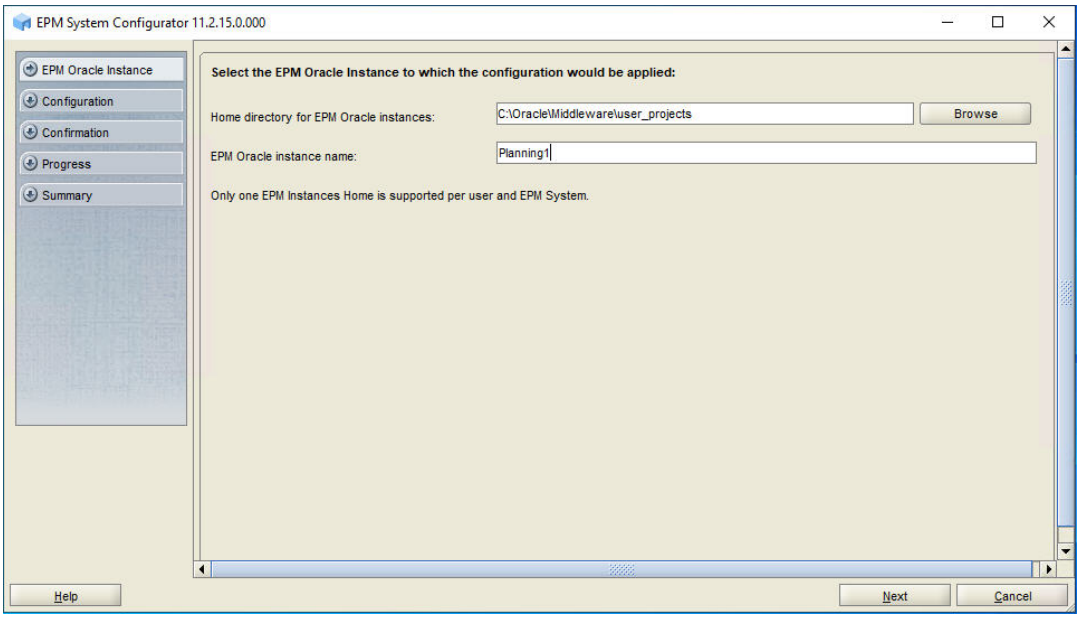
   On the **Select Components** page, enter a unique prefix, for example `PLANHOST1`.

2. When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `PLANHOST1`.

Configuring Planning on PLANHOST1

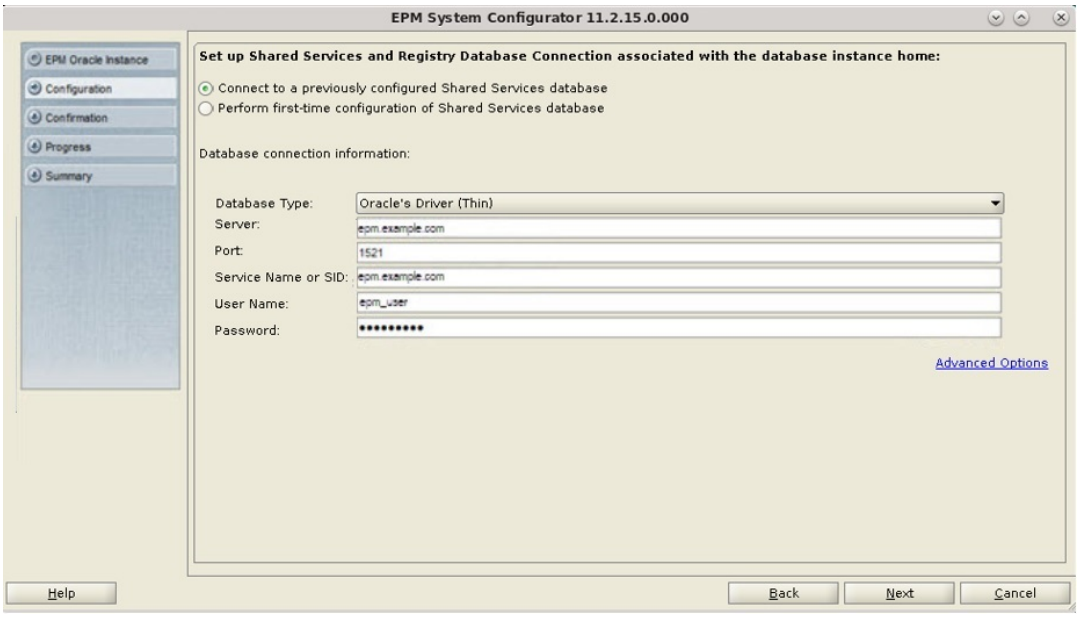
1. On *PLANHOST1*, launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
2. In **EPM Oracle Instance**, complete these steps, and then click **Next**.
   a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Oracle Hyperion Foundation Services (on*FNDHOST1*).

b. In **EPM Oracle instance name**, enter `Planning1`.

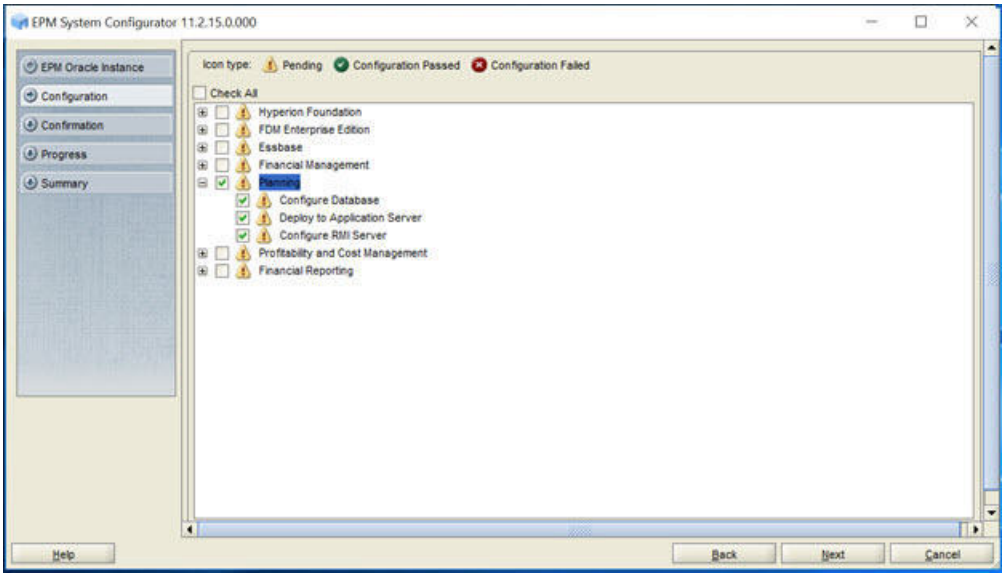


3. If you installed Oracle Hyperion Planning on the same server as Foundation Services, skip this step. Otherwise, on the Oracle Hyperion Shared Services Registry database configuration screen, select **Connect to a Previously Configured Shared Services Database**, enter the connection information for the Shared Services Registry database and the user name and password of the database account to use for accessing the database (recorded in Table 1), 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*).

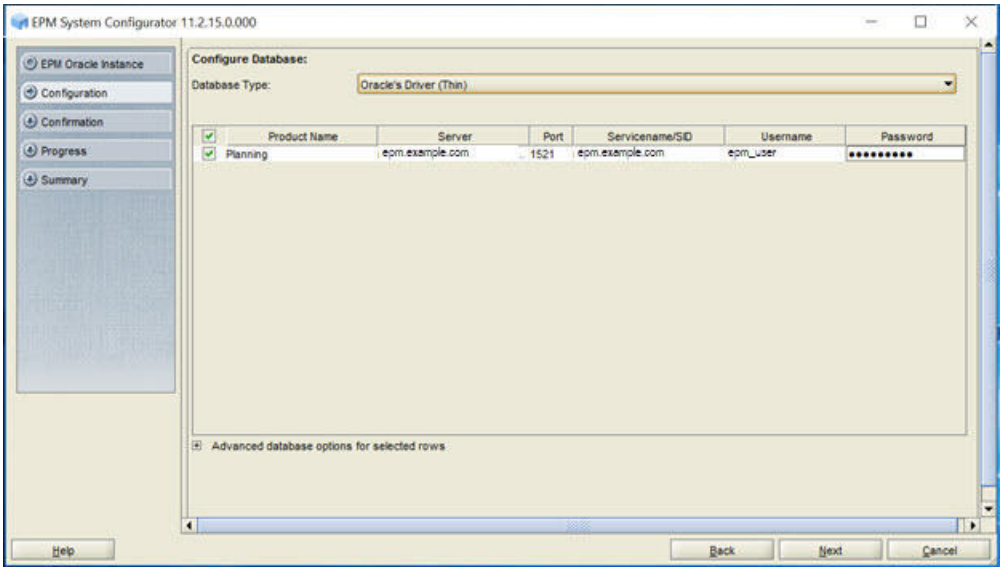


4. In **Configuration**, click **Uncheck All**, select **Planning**, then expand **Planning**, clear the selection from **Configure RMI Server**, and then click **Next**.

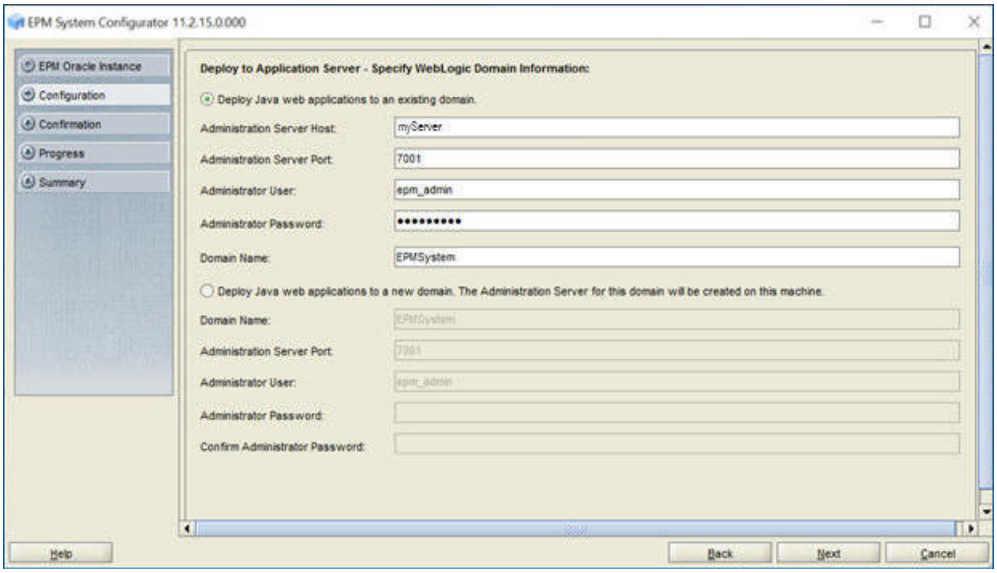


5. In **Configure Database**, click **Next** to use the default values to leverage the Foundation Services database for Planning.

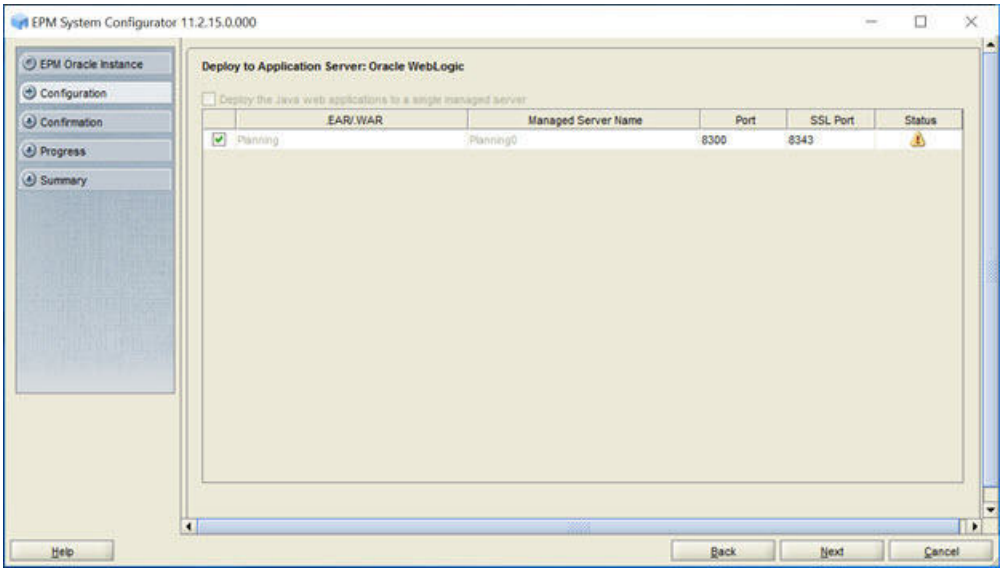
   The **Configure Database** step is needed only once per deployment, so if you are configuring an additional instance of Planning, skip this step.



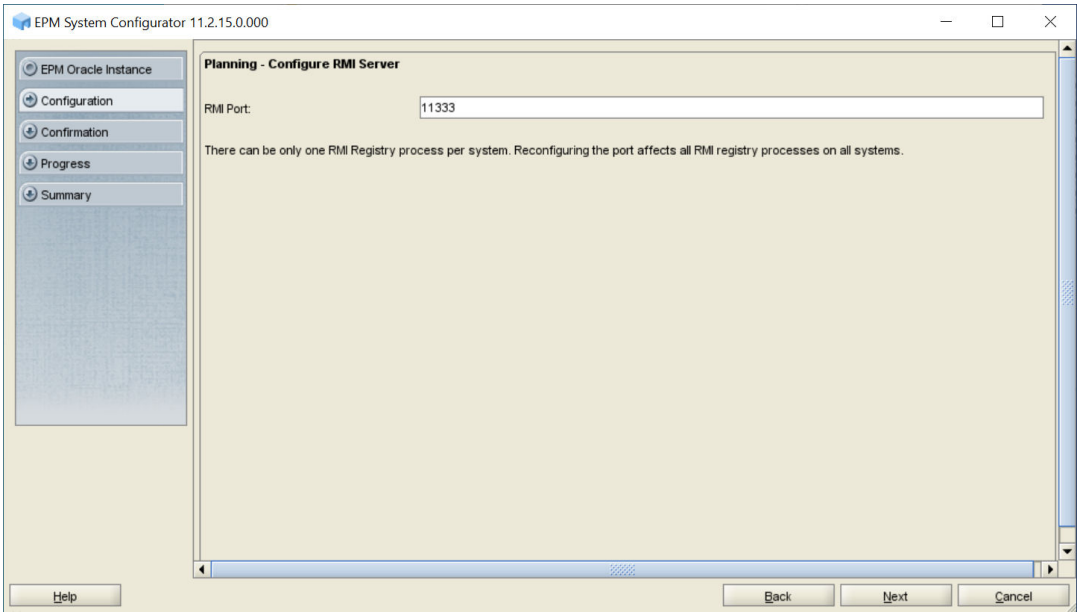
6. In **Deploy to Application Server - Specify WebLogic Domain Information**, click **Next** to deploy Planning to the Oracle WebLogic Server domain that you created on the Foundation Services host (*FNDHOST1*).



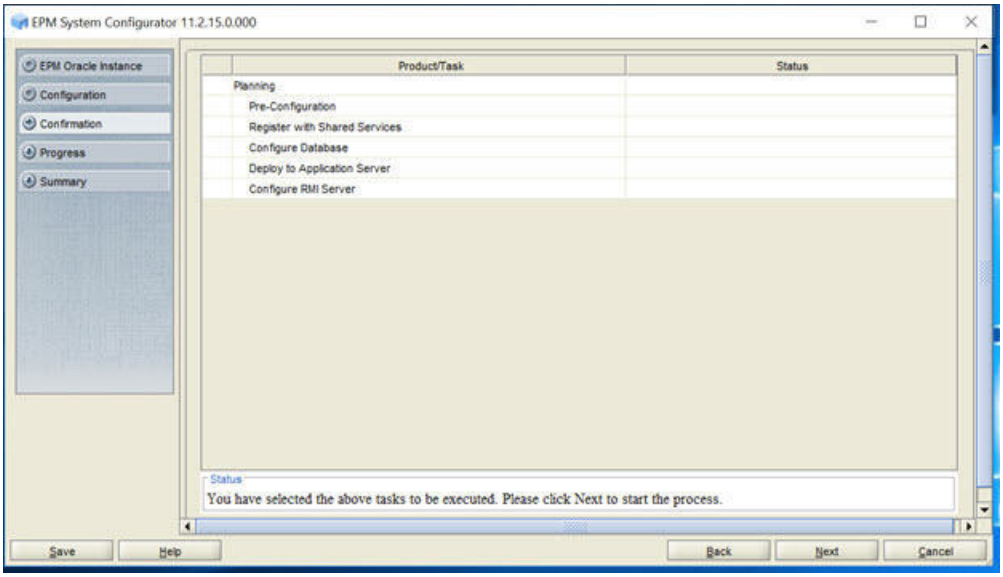
7. In **Deploy to Application Server: Oracle WebLogic**, click **Next** to deploy Planning web application.



8. In **Planning - Configure RMI Server**, click **Next**.



9. In **Confirmation**, review the summary of the configuration tasks that will be executed, and then click **Next**.



10. When the deployment process is complete, the **Summary** screen is displayed. Verify that all the tasks completed successfully, and then click **Finish**.
11. Start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

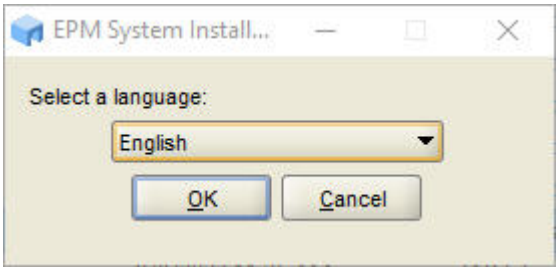
Installing and Configuring Financial Management on HFMHOST1

- Installing Financial Management
- Creating Infrastructure Schemas Using Repository Creation Utility (RCU)
- Configuring Financial Management

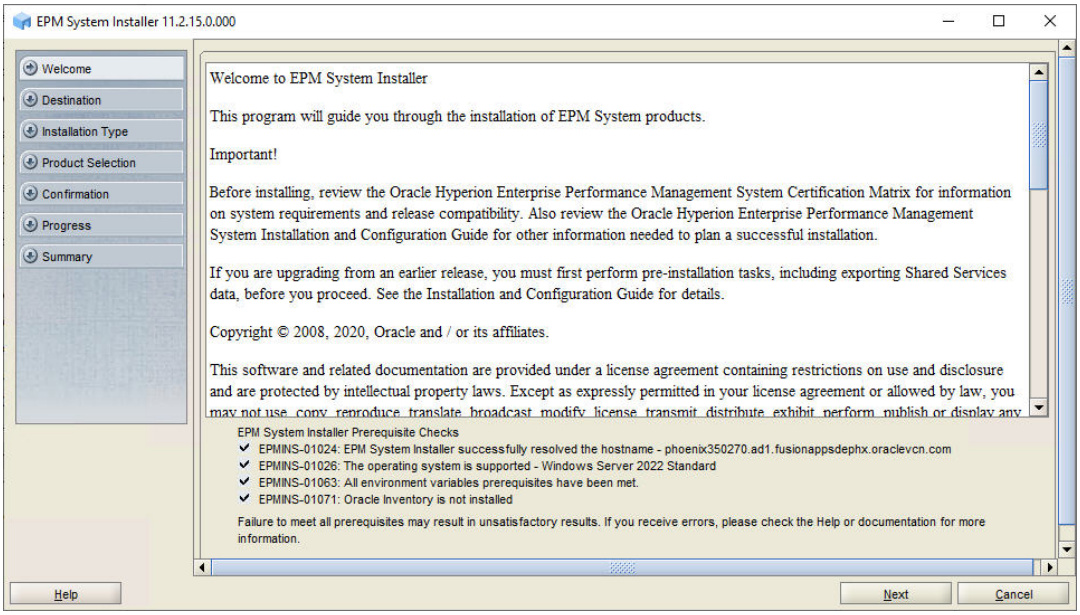
Installing Financial Management on HFMHOST1

To install Oracle Hyperion Financial Management on *HFMHOST1*:

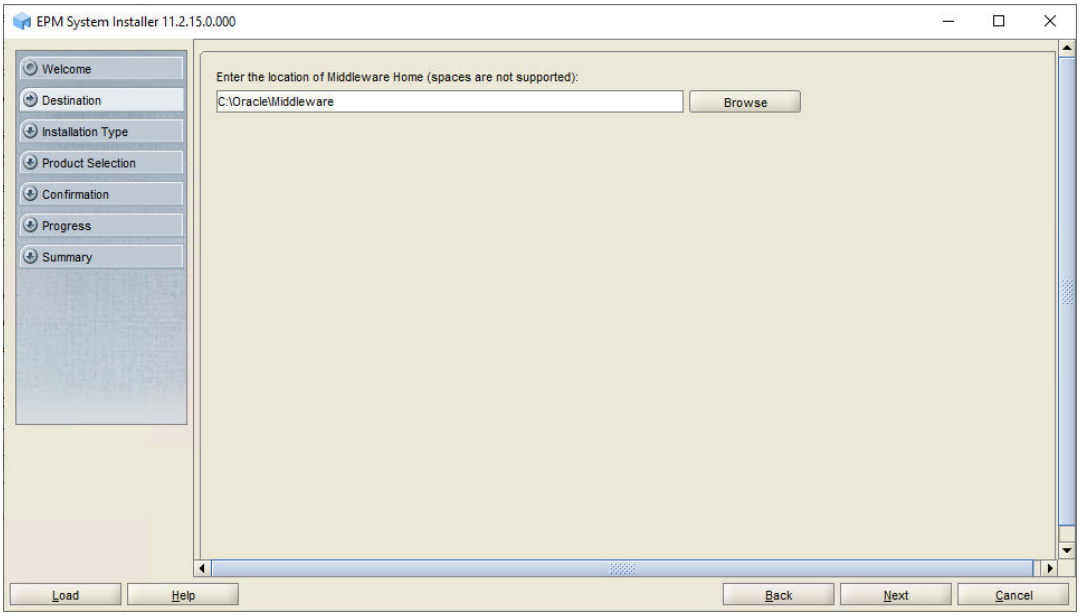
1. Log on to the Financial Management host machine (*HFMHOST1*) as the deployment user, and define a network drive (for example, `Z:/`) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, `//sharedhost/sharedlocation/downloads/epm_unzipped`).
2. From the mapped network drive, launch `installTool.cmd`.
3. In EPM System Installer, select a language, and then click **OK**.



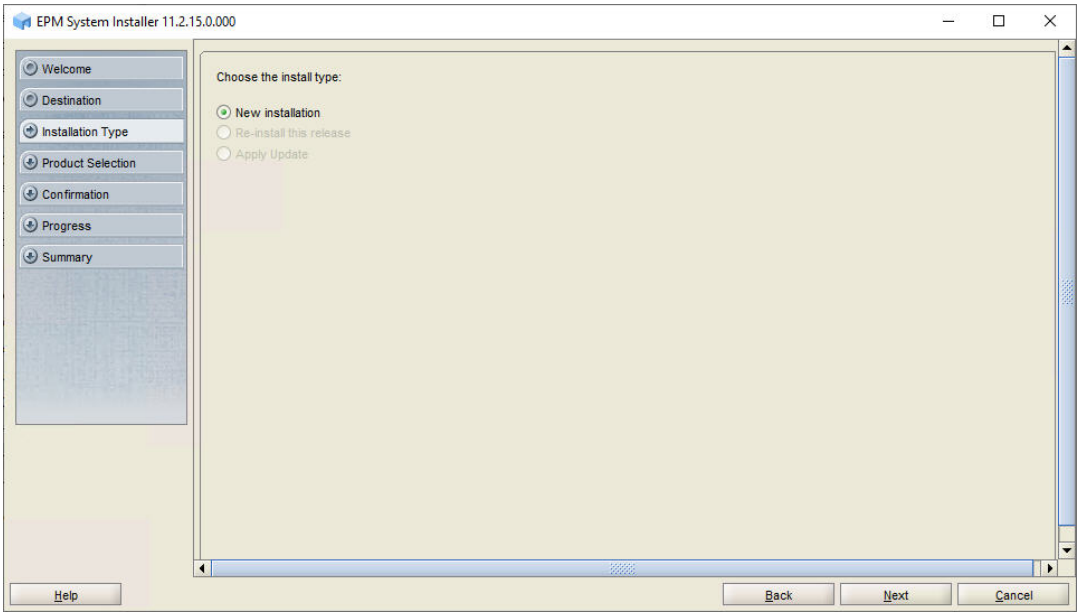
4. In **Welcome**, verify that your system has passed all prerequisite checks, and then click **Next**.



5. In **Destination**, specify the *MIDDLEWARE_HOME* directory location exactly as set while deploying Oracle Hyperion Foundation Services on *FNDHOST1*, and then click **Next**.



6. In **Installation Type**, click **Next**.

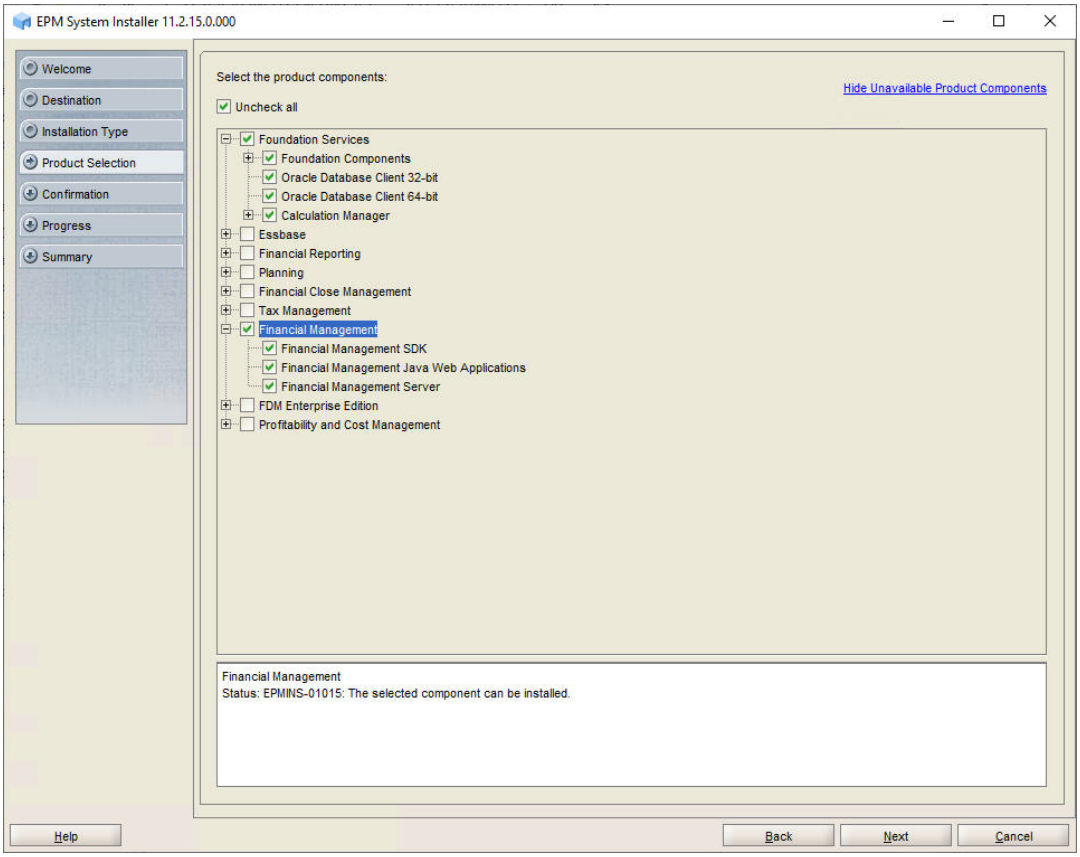


7. In **Product Selection**, clear the selection (uncheck) from **Uncheck All** and select the following component:

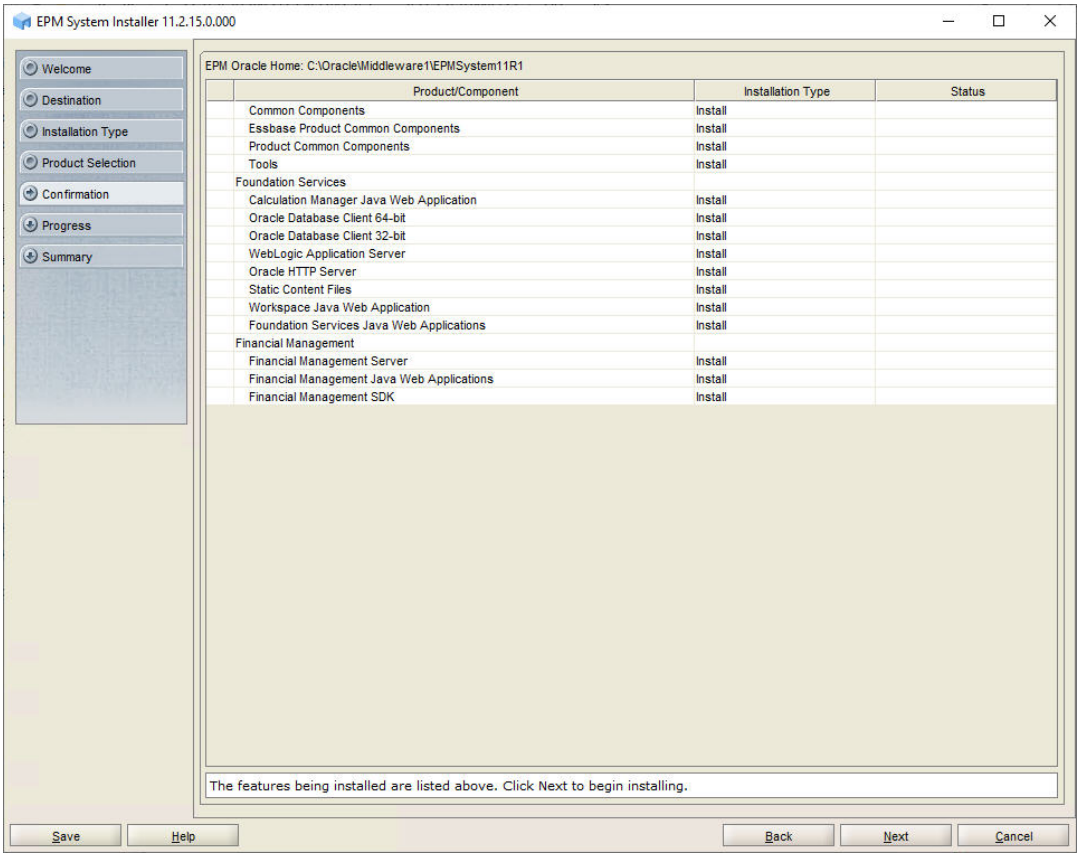
   Financial Management.

   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 SDK and Financial Management Java web applications are already installed.



8. In **Confirmation**, click **Next** to begin the installation of the selected components on *HFMHOST1*.



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

Creating Infrastructure Schemas Using Repository Creation Utility on HFMHOST1

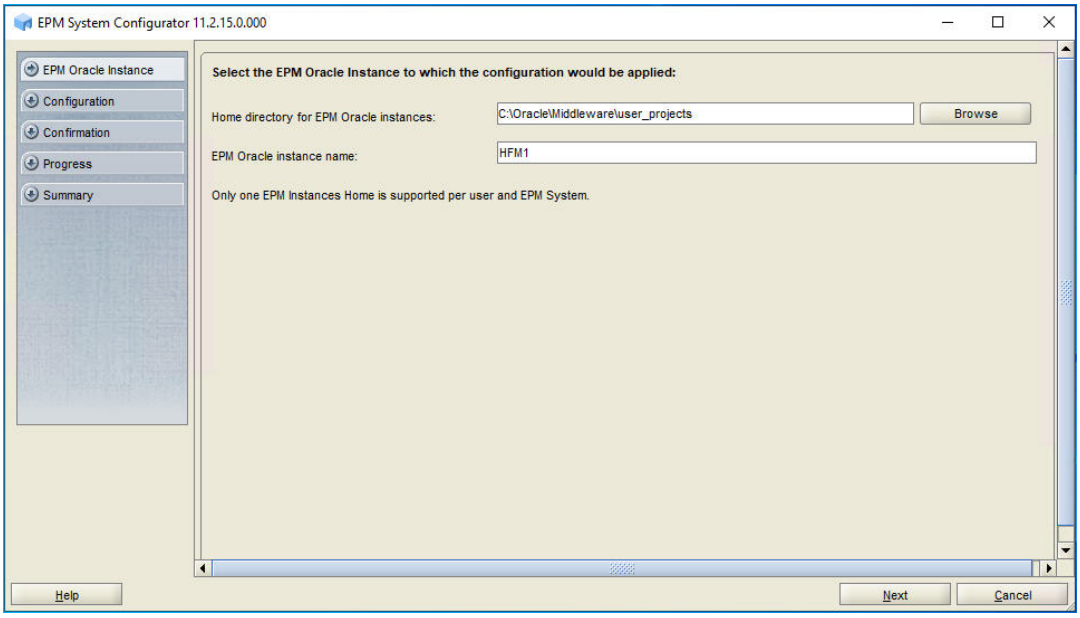
1. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility.

   On the **Select Components** page, enter a unique prefix, for example `HFMHOST1`.

2. When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `HFMHOST1`.

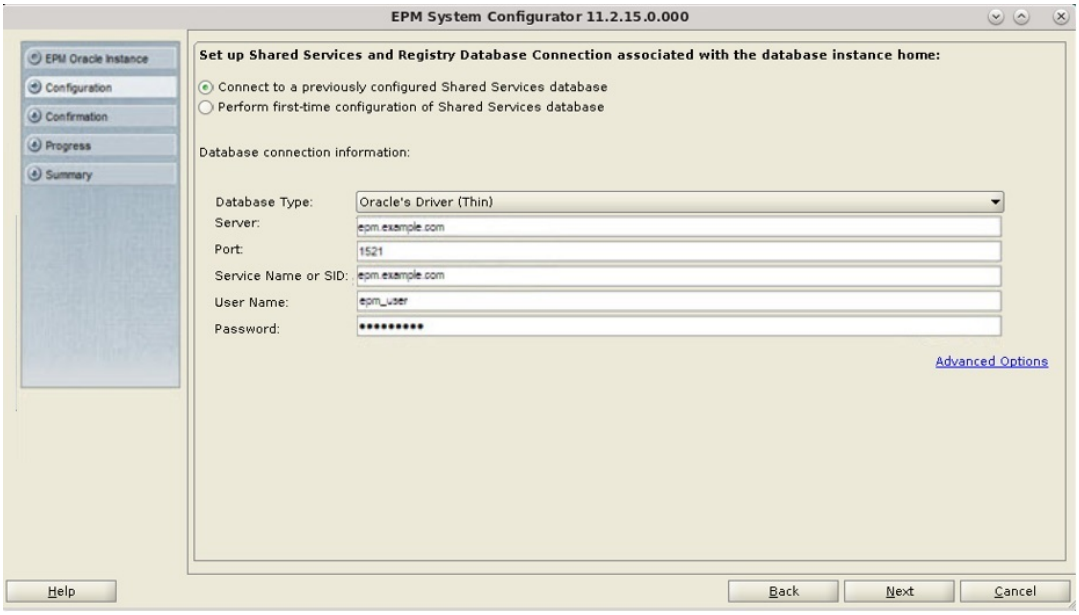
Configuring Financial Management on HFMHOST1

1. On *HFMHOST1*, launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
2. In **EPM 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 Oracle Hyperion Foundation Services (on *FNDHOST1*).
   b. In **EPM Oracle instance name**, enter `HFM1`.

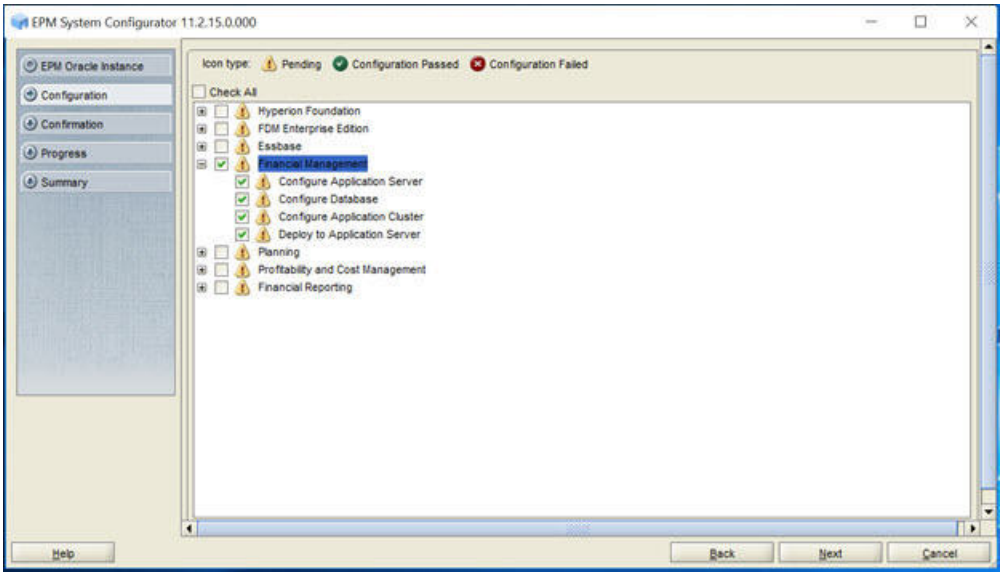


3. If you installed Oracle Hyperion Financial Management on the same server as Foundation Services, skip this step. Otherwise, on the Oracle Hyperion Shared Services Registry database configuration screen, select **Connect to a Previously Configured Shared Services Database**, enter the connection information 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 1), 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*).

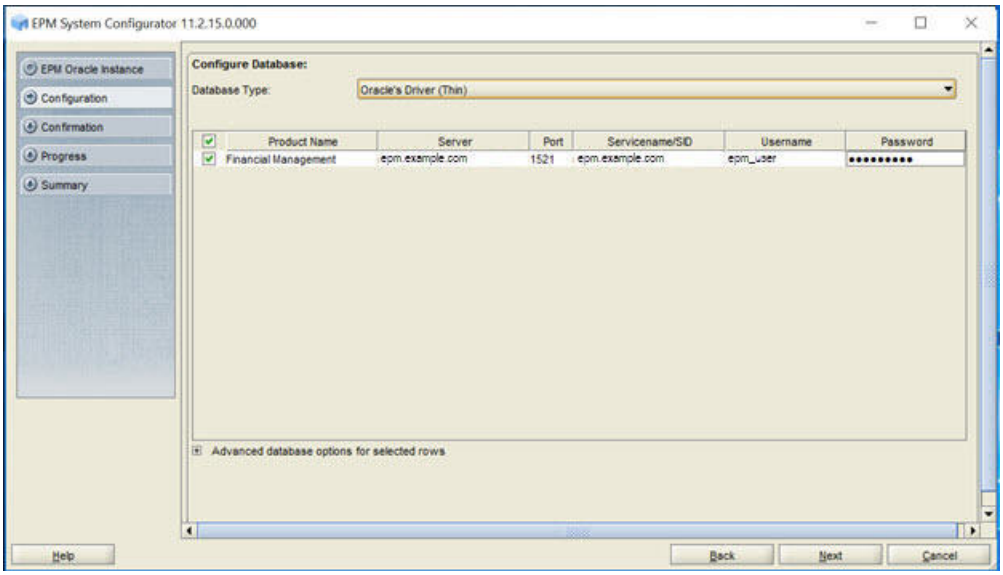


4. In **Configuration**, perform the following tasks, and then click **Next**.
   - Remove the selection (uncheck) from **Uncheck All**
   - Select **Financial Management**

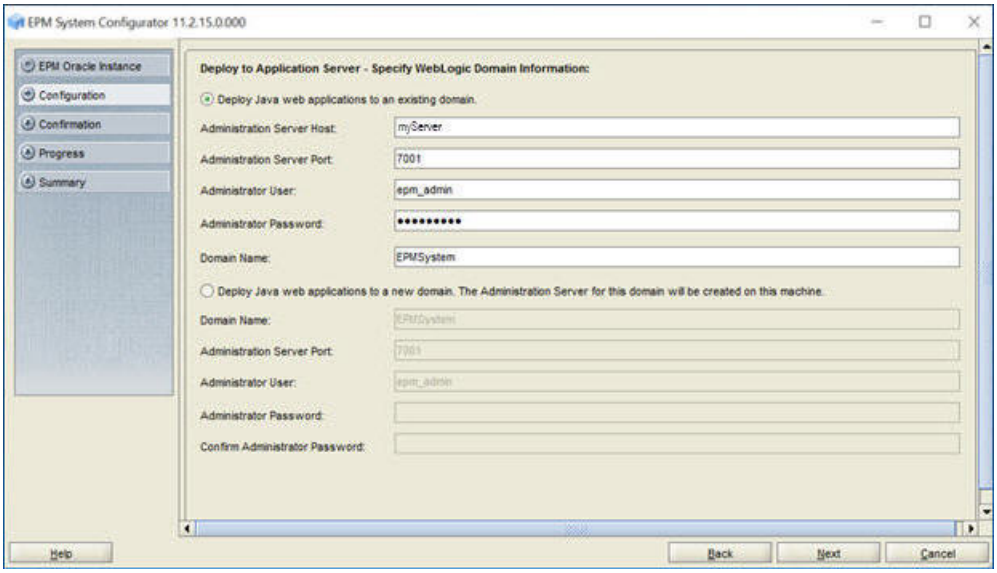


5. In **Configure Database**, click **Next** to use the default values to leverage the Foundation Services database for Financial Management.

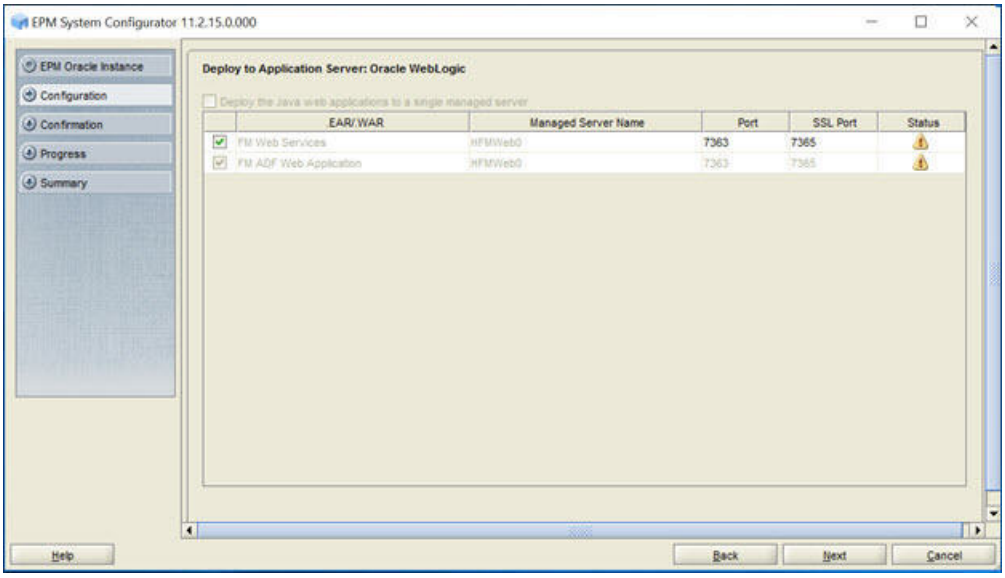
   If you are configuring an additional instance of Financial Management, when you are prompted whether to drop and re-create the tables or reuse the existing database, select **Reuse the existing database**.



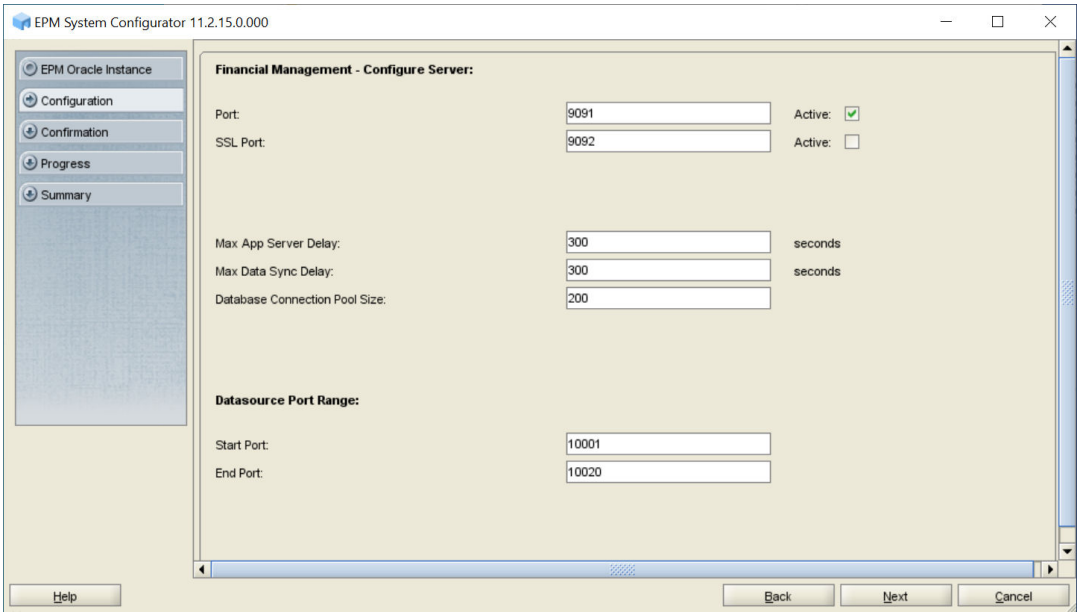
6. In **Deploy to Application Server – Specify WebLogic Domain Information**, click **Next** to deploy the Financial Management web application to the Oracle WebLogic Server domain that you created on the Foundation Services host (*FNDHOST1*).



7. In **Deploy to Application Server: Oracle WebLogic**, click **Next**.

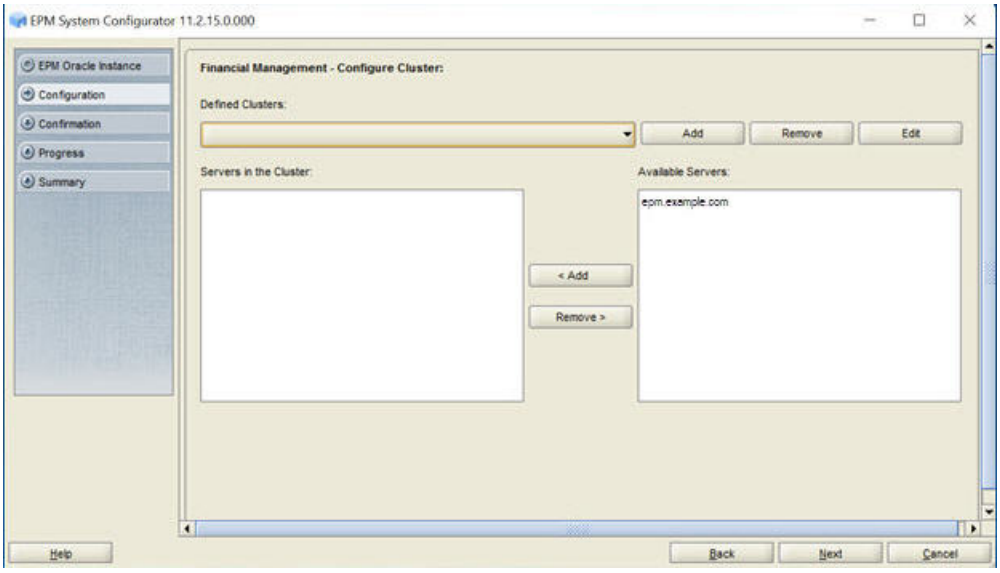


8. In **Financial Management – Configure Server**, click Next.

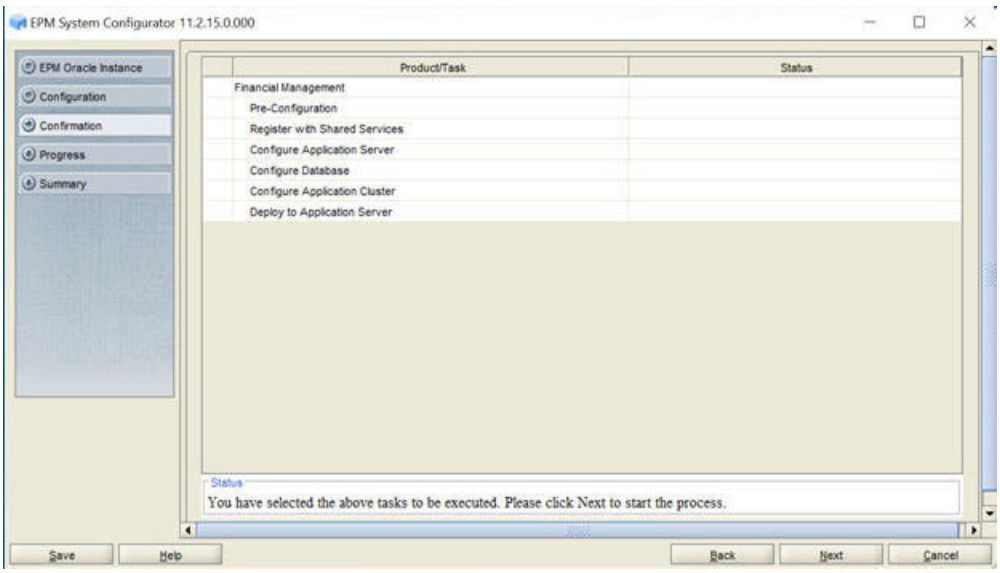


9. In **Financial Management – Configure Cluster**, click **Next**.

   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.



10. In **Confirmation**, review the summary of the configuration tasks that will be executed, and then click **Next**.



11. When the deployment process is complete, the **Summary** screen is displayed. Verify that all the tasks completed successfully, and then click **Finish**.

12. Start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

Installing and Configuring Profitability and Cost Management on HPCMHOST1

> **Note:**
>
> For Profitability and Cost Management:
>
> - Beginning with Release 11.2.15, only Unicode mode Essbase applications are supported.
> - The Unicode checkbox in the New Application dialog is now disabled and grayed out. By default, all the new Essbase applications will be set to Unicode mode.
> - The existing non-Unicode applications will be automatically converted to Unicode during the 11.2.15 upgrade.

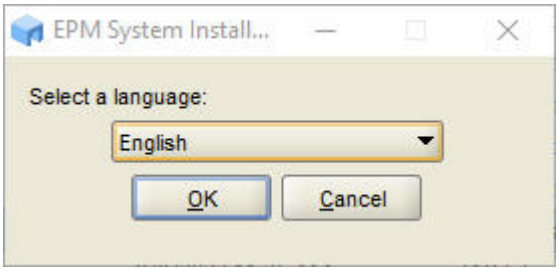
- Installing Profitability and Cost Management
- Creating Infrastructure Schemas Using Repository Creation Utility (RCU)
- Configuring Profitability and Cost Management

Installing Profitability and Cost Management on HPCMHOST1

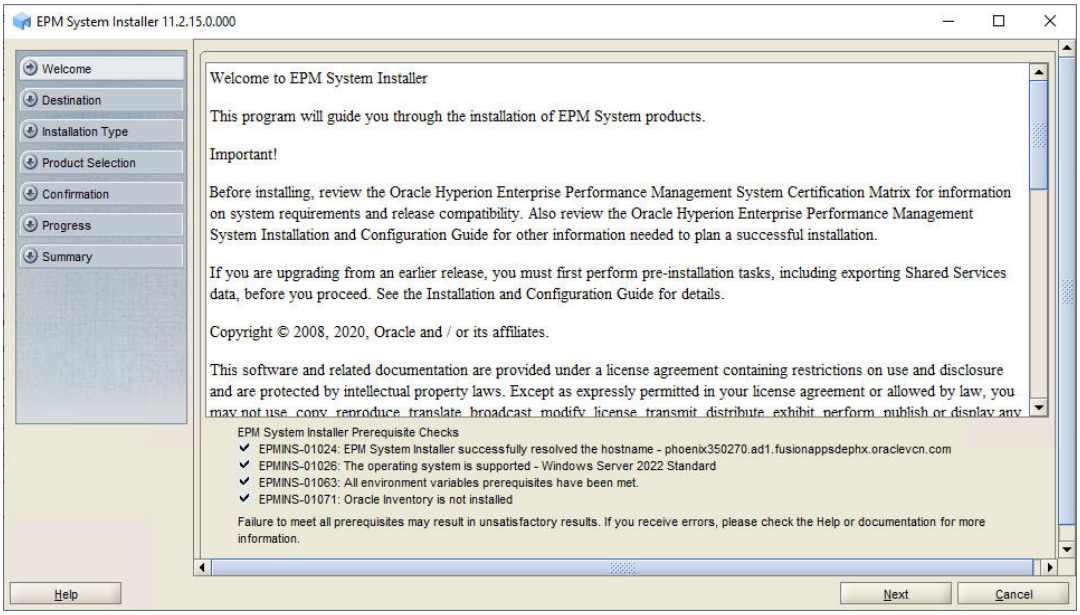
If you are configuring the Oracle Hyperion Profitability and Cost Management instance on the same server on which you configured the Oracle Hyperion Foundation Services instance, you can skip the installation steps and RCU steps and go directly to the configuration steps. See Configuring Profitability and Cost Management on HPCMHOST1.

To install Profitability and Cost Management on *HPCMHOST1*:

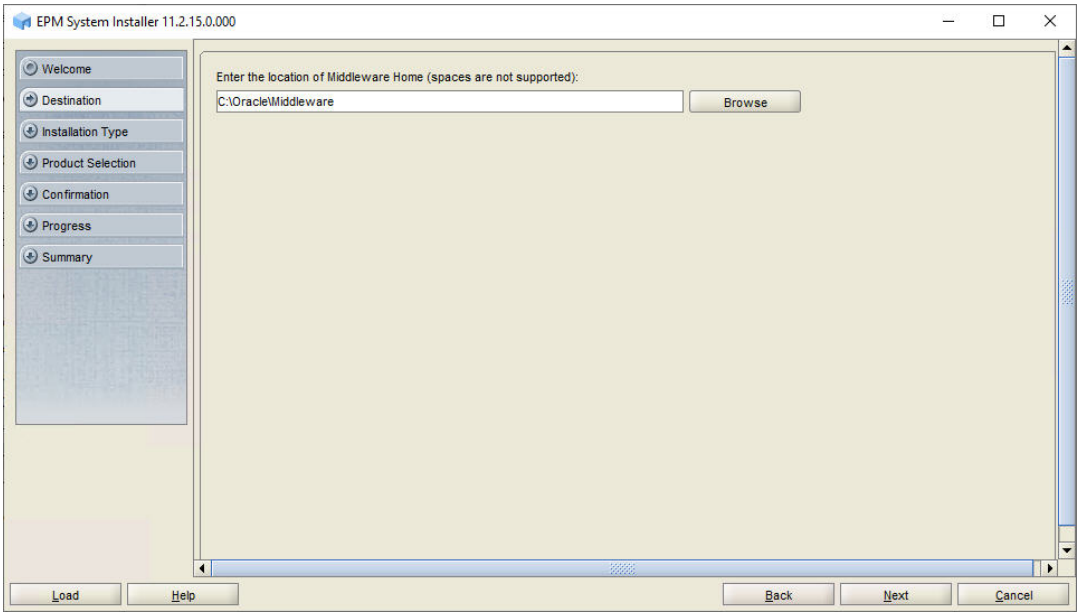
1. Log on to the Profitability and Cost Management host machine (*HPCMHOST1*) as the deployment user, and define a network drive (for example, `Z:/`) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, `//sharedhost/sharedlocation/downloads/epm_unzipped`).
2. From the mapped network drive, launch `installTool.cmd`.
3. In EPM System Installer, select a language, and then click **OK**.



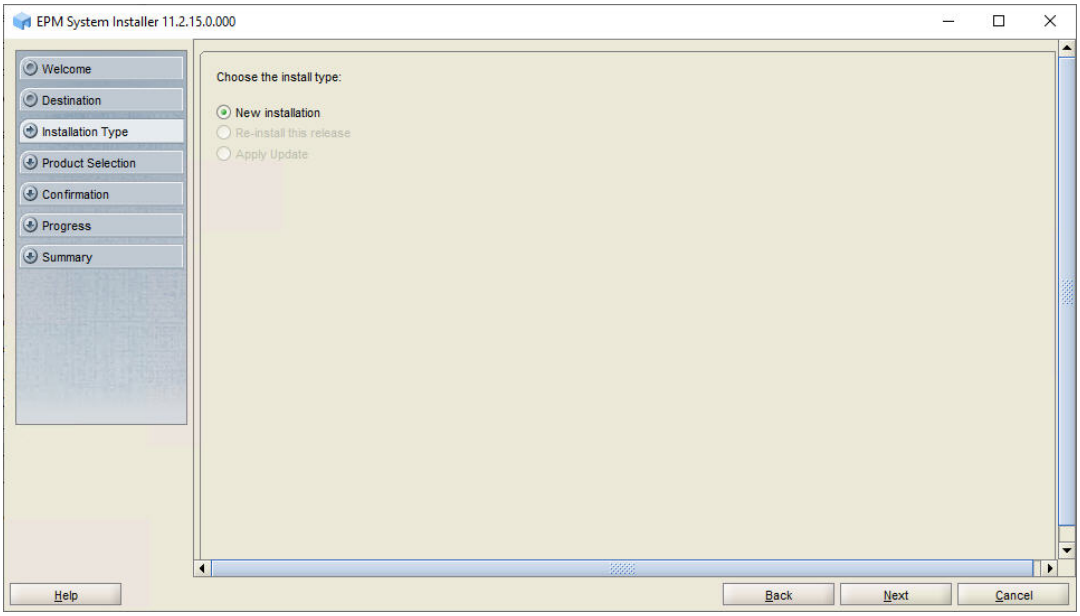
4. In **Welcome**, verify that your system has passed all prerequisite checks, and then click **Next**.



5. In **Destination**, specify the *MIDDLEWARE_HOME* directory location exactly as set while deploying Foundation Services on *FNDHOST1*, and then click **Next**.



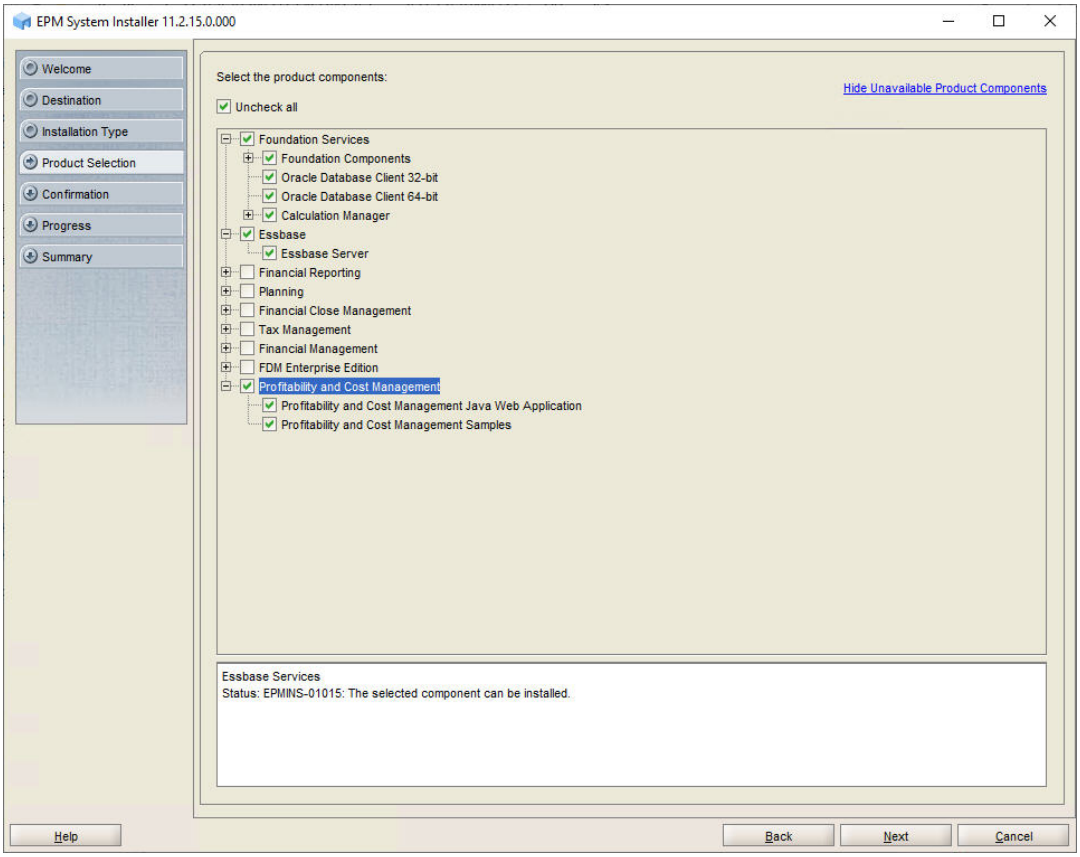
6. In **Installation Type**, click **Next**.



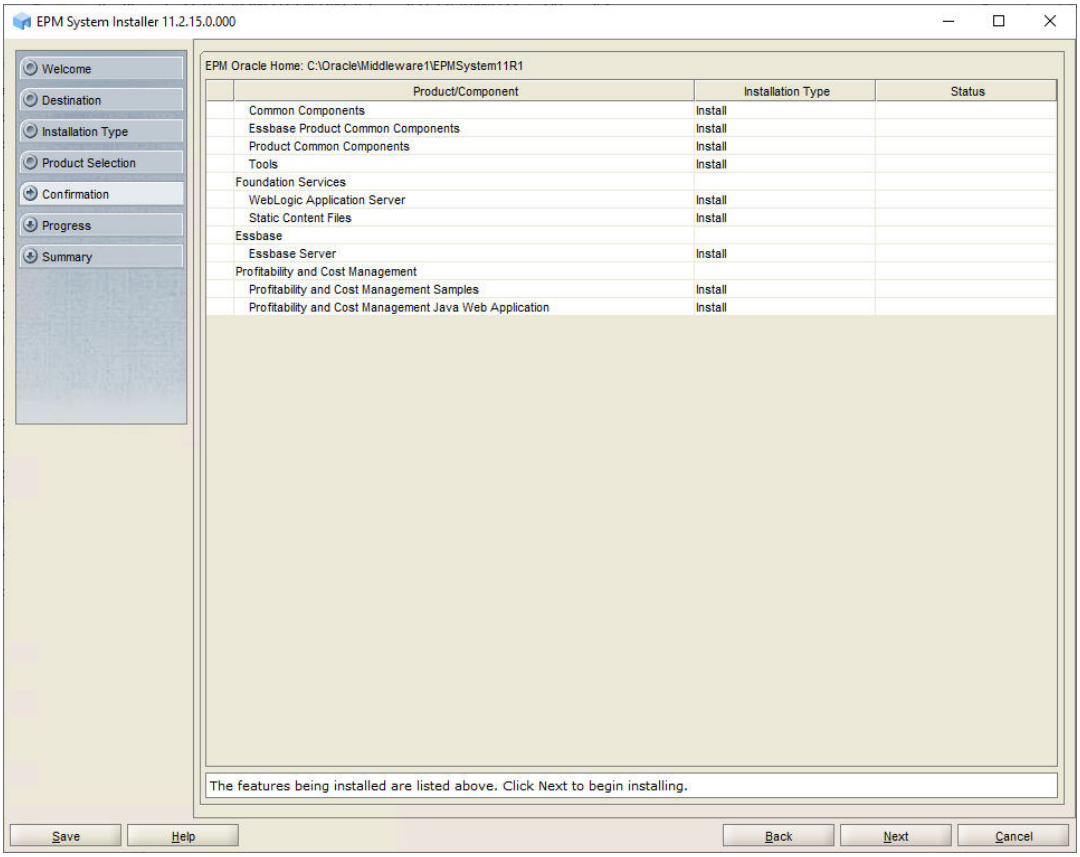
7. In **Product Selection**, perform the following tasks:

   In **Product Selection**, clear the selection (uncheck) from **Uncheck All**, and then select the following components:

   - From **Profitability and Cost Management**, select **Profitability and Cost Management Java Web Application** and **Profitability and Cost Management Samples**.
   - From **Essbase**, select **Essbase Server**.



8. In **Confirmation**, click **Next** to begin the installation of the selected components on *HPCMHOST1*.



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

Creating Infrastructure Schemas Using Repository Creation Utility on HPCMHOST1

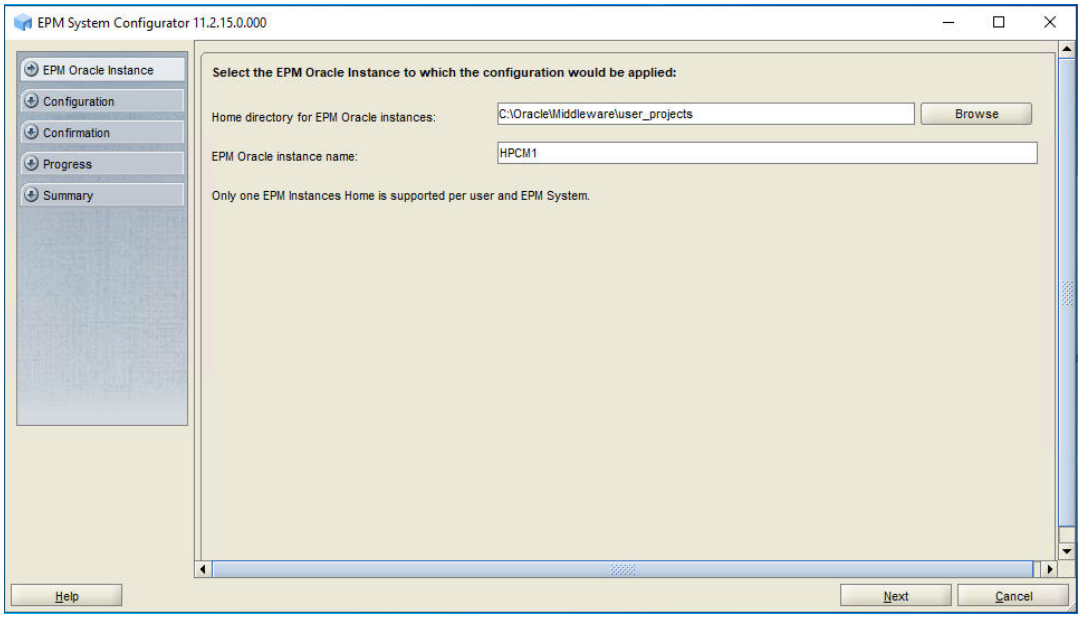
1. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility.

   On the **Select Components** page, enter a unique prefix, for example `HPCMHOST1`.

2. When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `HPCMHOST1`.

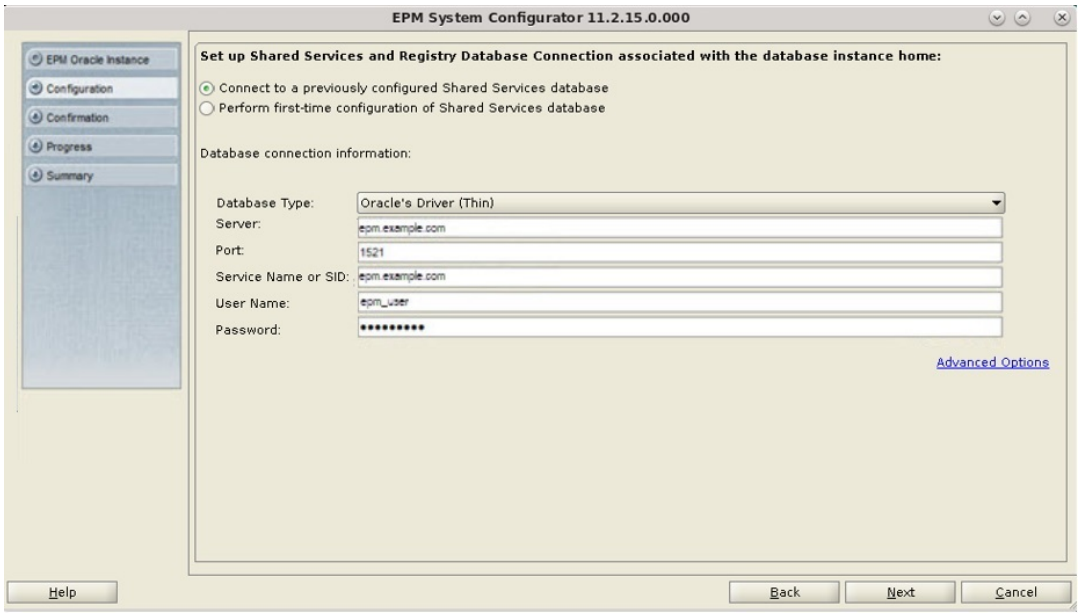
Configuring Profitability and Cost Management on HPCMHOST1

1. On *`HPCMHOST1`*, launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
2. In **EPM 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 Oracle Hyperion Foundation Services (on*FNDHOST1*).
   b. In **EPM Oracle instance name**, enter `HPCM1`.

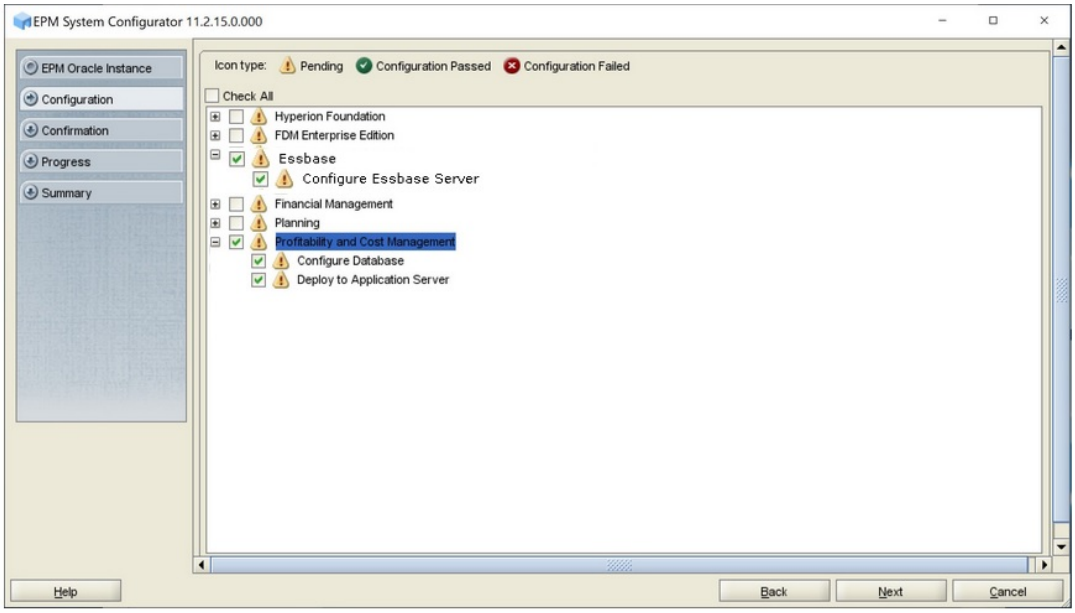


3. If you installed Oracle Hyperion Profitability and Cost Management on the same server as Foundation Services, skip this step. Otherwise, on the Oracle Hyperion Shared Services Registry database configuration screen, select **Connect to a Previously Configured Shared Services Database**, enter the 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 1), 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*).

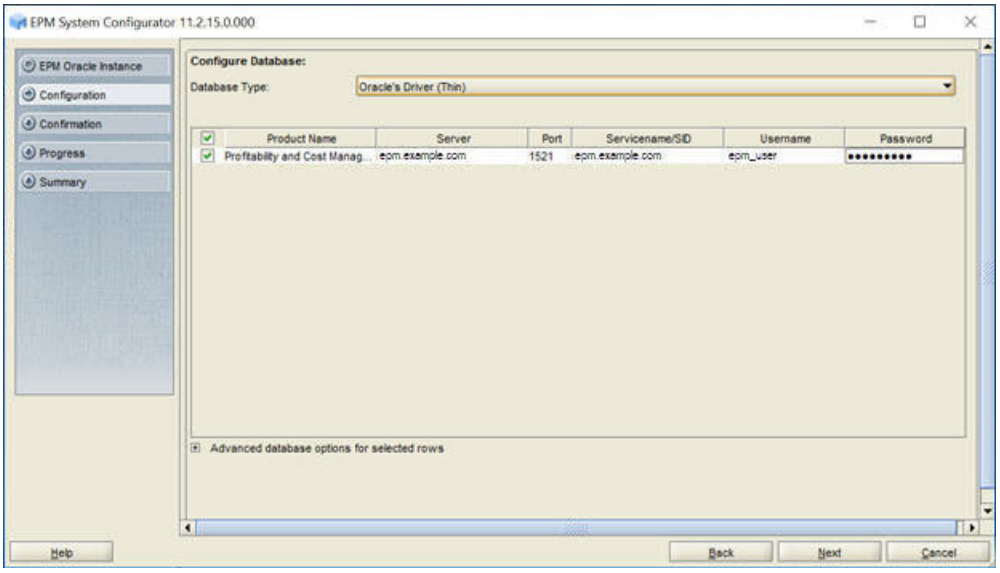


4. In **Configuration**, clear the selection (uncheck) from **Uncheck All**, select **Profitability and Cost Management**, expand **Essbase** and select **Essbase Server**, and then click **Next**.

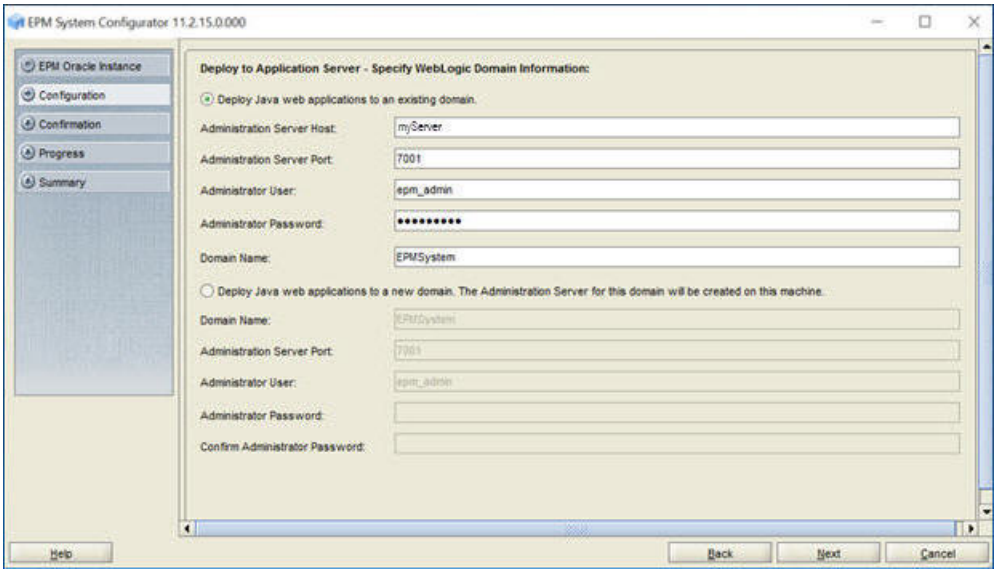


5. In **Configure Database**, click **Next** to use the default values to leverage the Foundation Services database for Profitability and Cost Management.

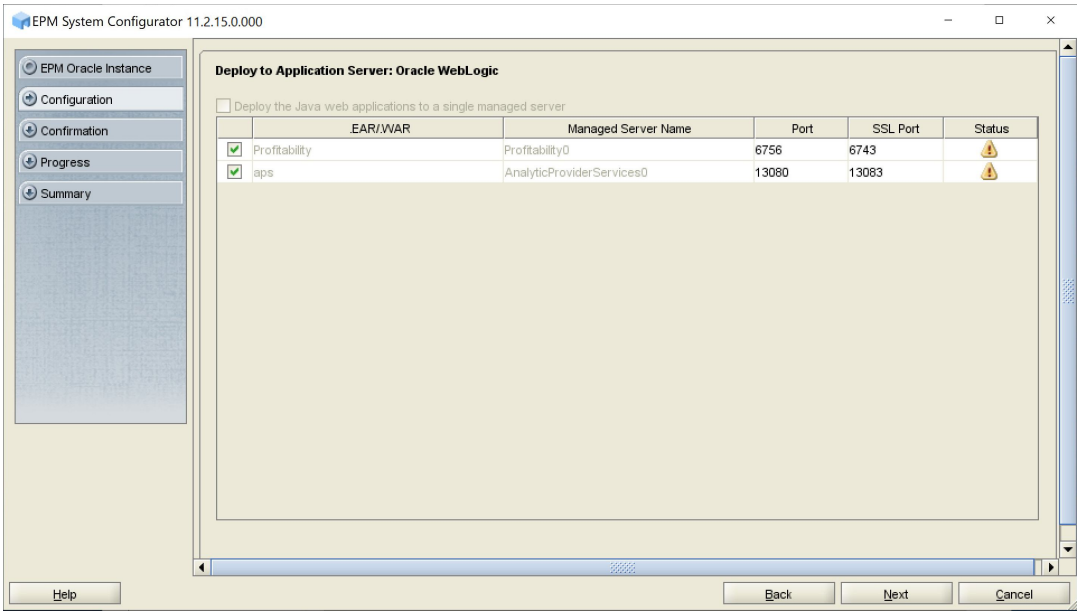
   The **Configure Database** screen appears once per deployment, so if you are configuring an additional instance of Profitability and Cost Management, skip this step.



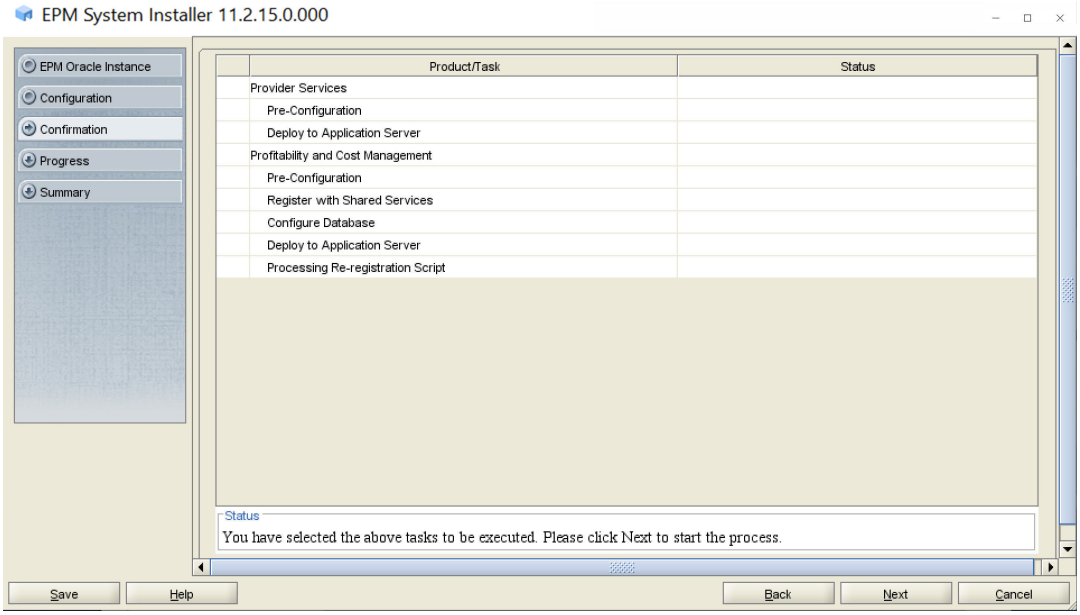
6. In **Deploy to Application Server - Specify WebLogic Domain Information**, click **Next** to deploy Profitability and Cost Management to the Oracle WebLogic Server domain that you created on the Foundation Services host (*FNDHOST1*).



7. In **Deploy to Application Server: Oracle WebLogic**, click **Next** to deploy Profitability and Cost Management web applications.



8. In **Confirmation**, review the summary of the configuration tasks that will be executed, and then click **Next**.



9. When the deployment process is complete, the **Summary** screen is displayed. Verify that all the tasks completed successfully, and then click **Finish**.
10. Start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

Installing and Configuring FDMEE on FDMEEHOST1

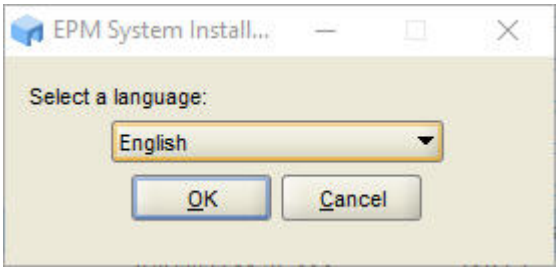
- Installing FDMEE
- Creating Infrastructure Schemas Using Repository Creation Utility (RCU)
- Configuring FDMEE

Installing FDMEE on FDMEEHOST1

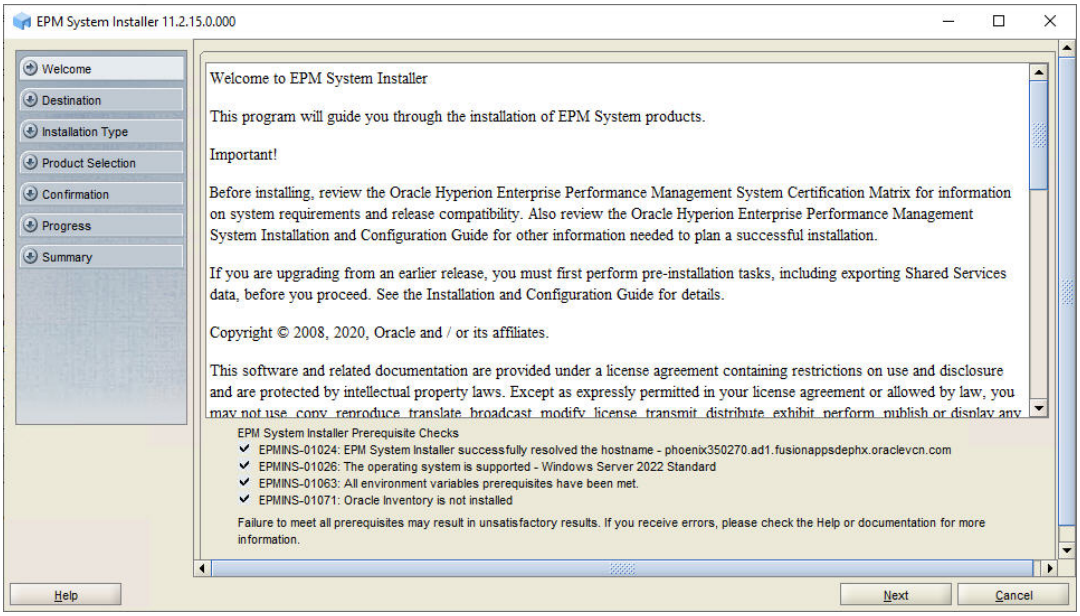
If you are configuring the Oracle Hyperion Financial Data Quality Management, Enterprise Edition instance on the same server on which you configured the Oracle Hyperion Foundation Services instance, you can skip the installation steps and RCU steps and go directly to the configuration steps. See Configuring FDMEE on FDMEEHOST1.

To install FDMEE on *`FDMEEHOST1`*:

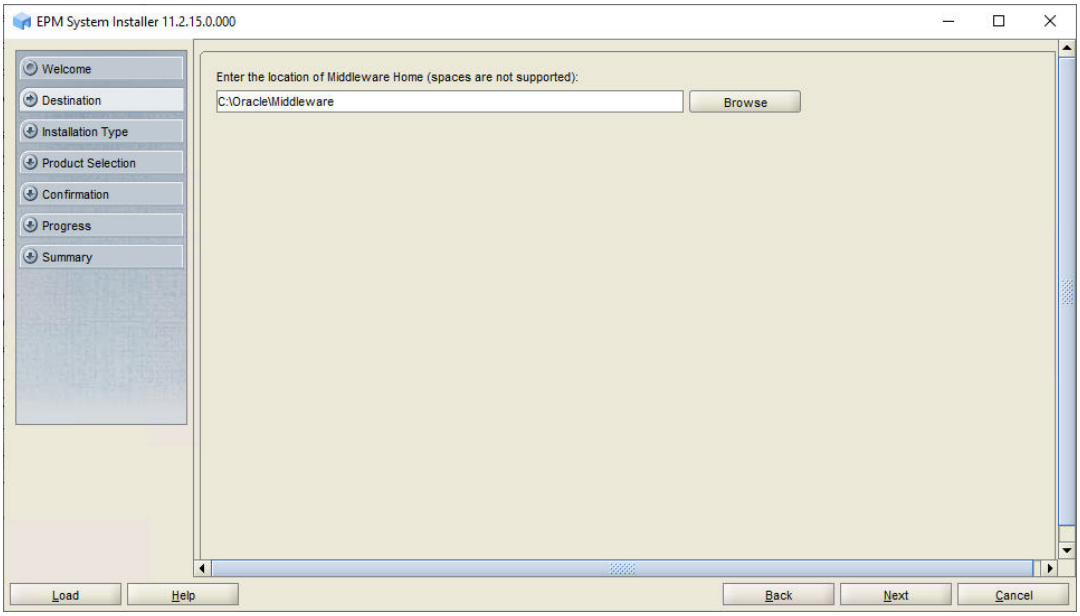
1. Log on to the FDMEE host machine (*`FDMEEHOST1`*) as the deployment user, and define a network drive (for example, `Z:/`) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, `//sharedhost/sharedlocation/downloads/epm_unzipped`).
2. From the mapped network drive, launch `installTool.cmd`.
3. In EPM System Installer, select a language, and then click **OK**.



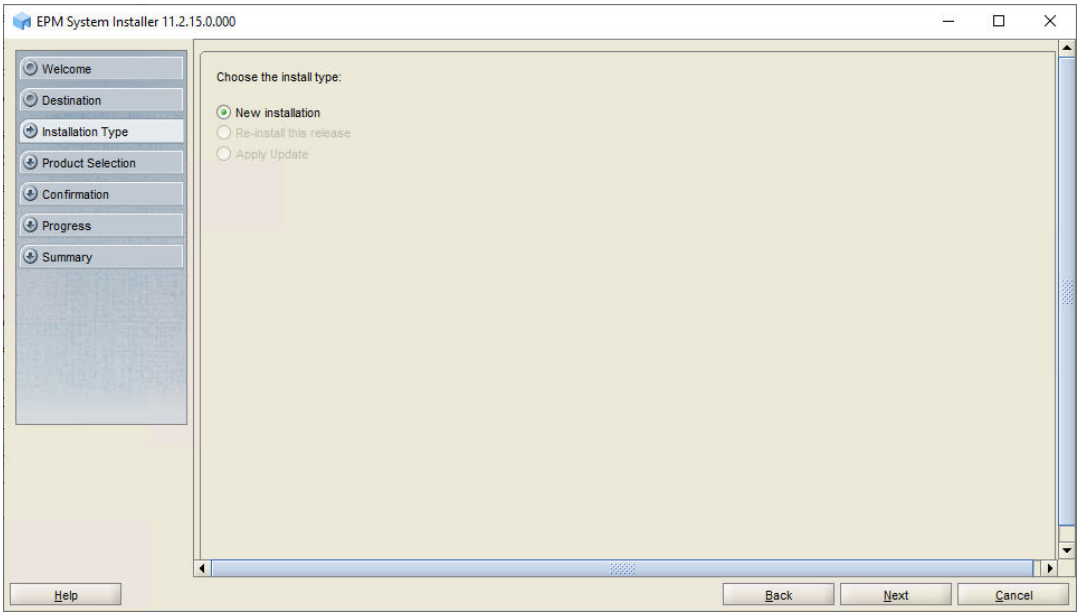
4. In **Welcome**, verify that your system has passed all prerequisite checks, and then click **Next**.



5. In **Destination**, specify the *MIDDLEWARE_HOME* directory location exactly as set while deploying Foundation Services on *FNDHOST1*, and then click **Next**.



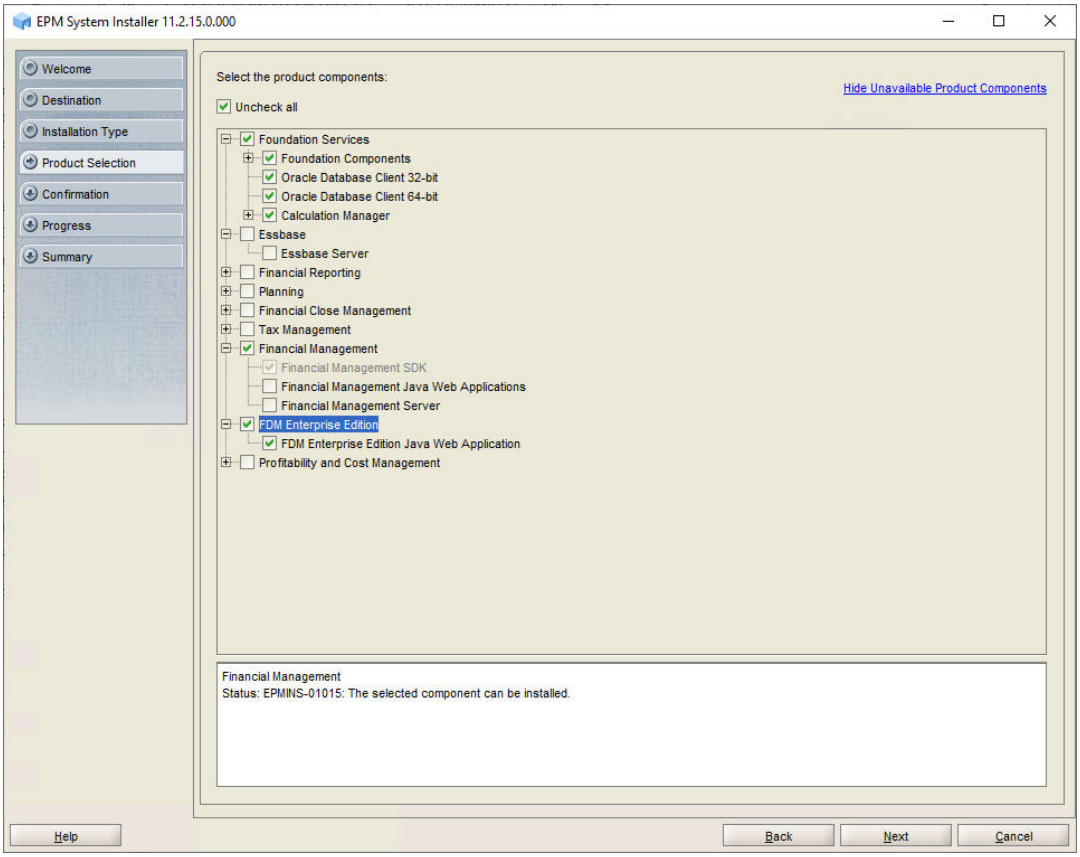
6. In **Installation Type**, click **Next**.



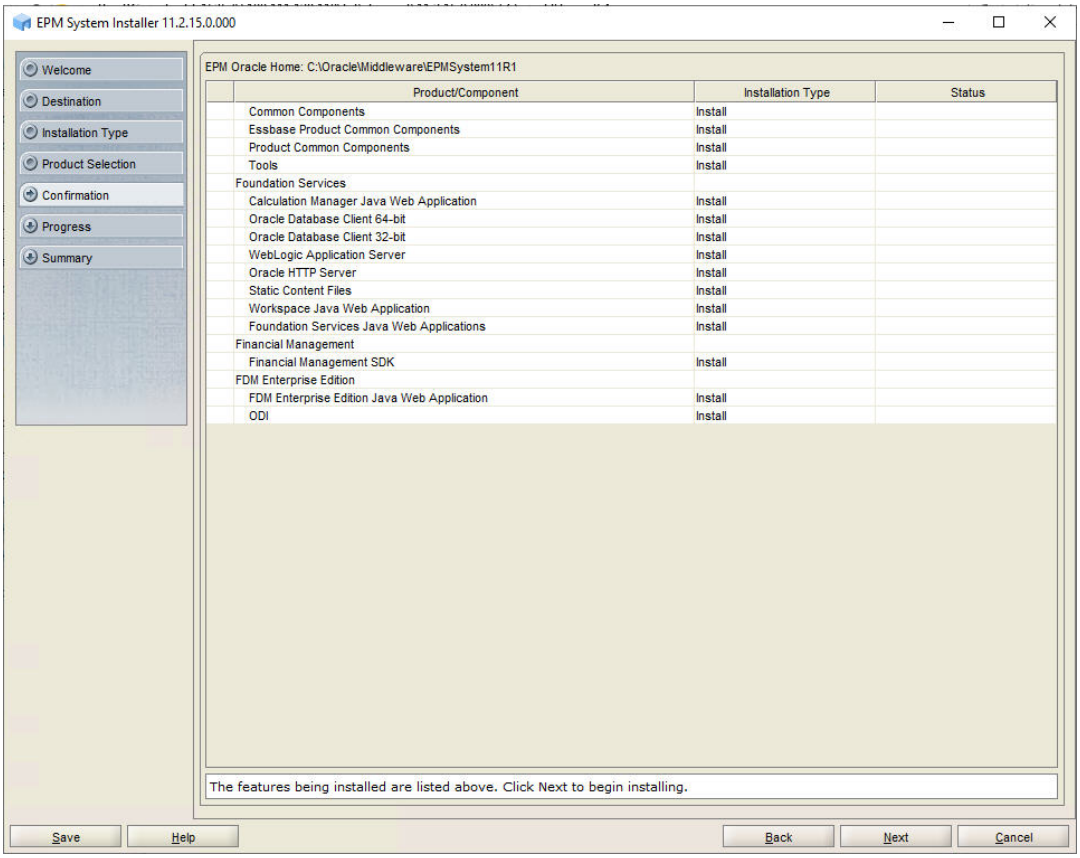
7. In **Product Selection**, clear the selection (uncheck) from **Uncheck All** and select the following component:

   FDM Enterprise Edition

   Retain the selection for **Financial Management SDK** if it is selected.



8. In **Confirmation**, click **Next** to begin the installation of the selected components on *FDMEEHOST1*.



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

Creating Infrastructure Schemas Using Repository Creation Utility on FDMEEHOST1

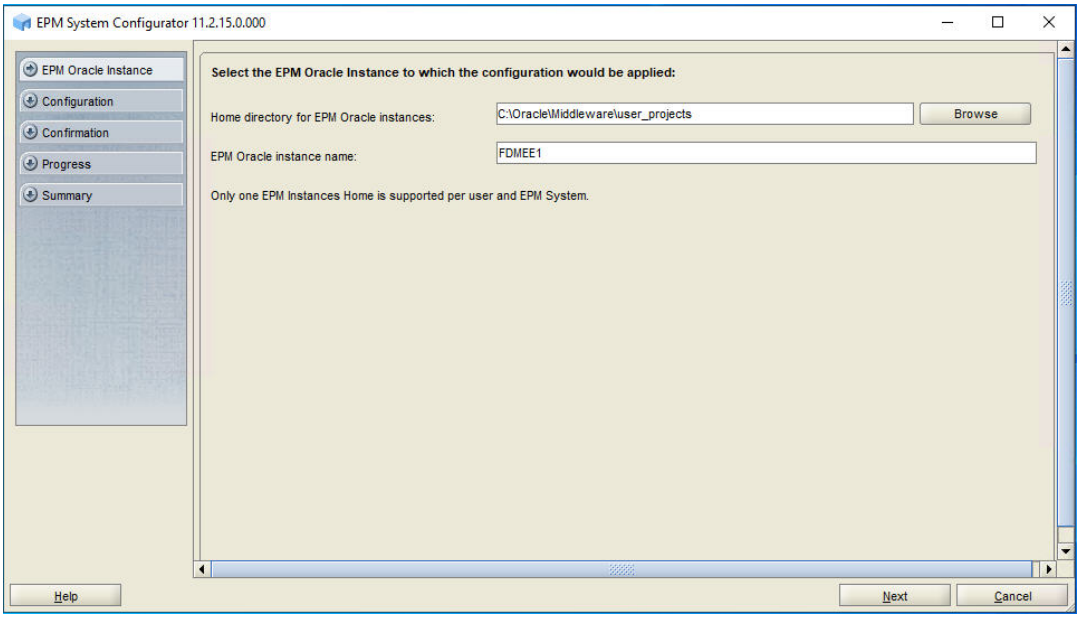
1. On *FDMEEHOST1*, follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility.

   On the **Select Components** page, enter a unique prefix, for example `FDMEEHOST1`.

2. When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `FDMEEHOST1`.

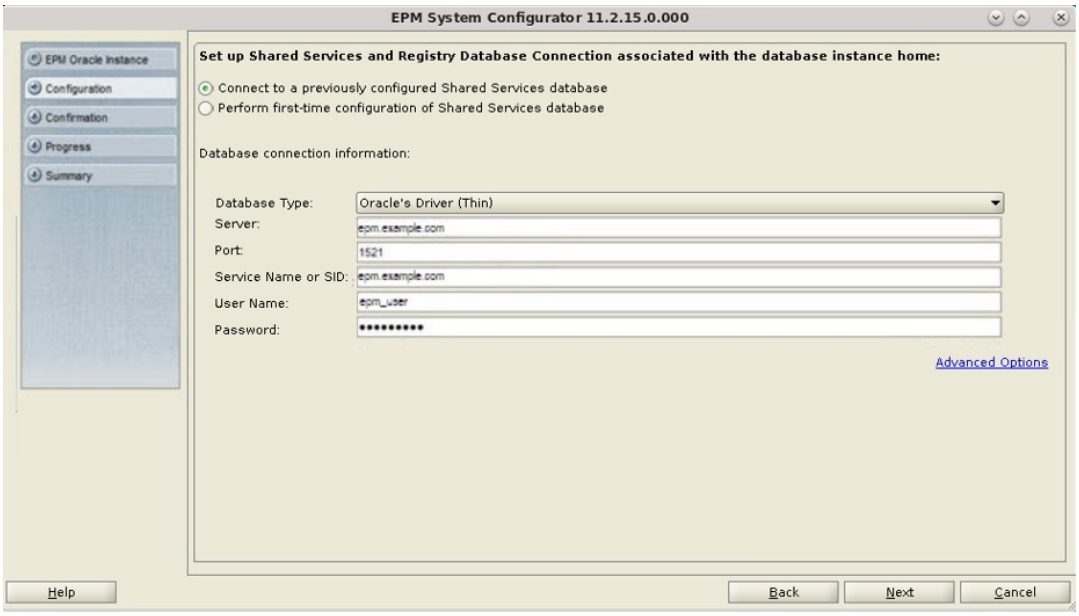
Configuring FDMEE on FDMEEHOST1

1. Launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
2. In **EPM 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 Oracle Hyperion Foundation Services (on *FNDHOST1*).
   b. In **EPM Oracle instance name**, enter `FDMEE1`.

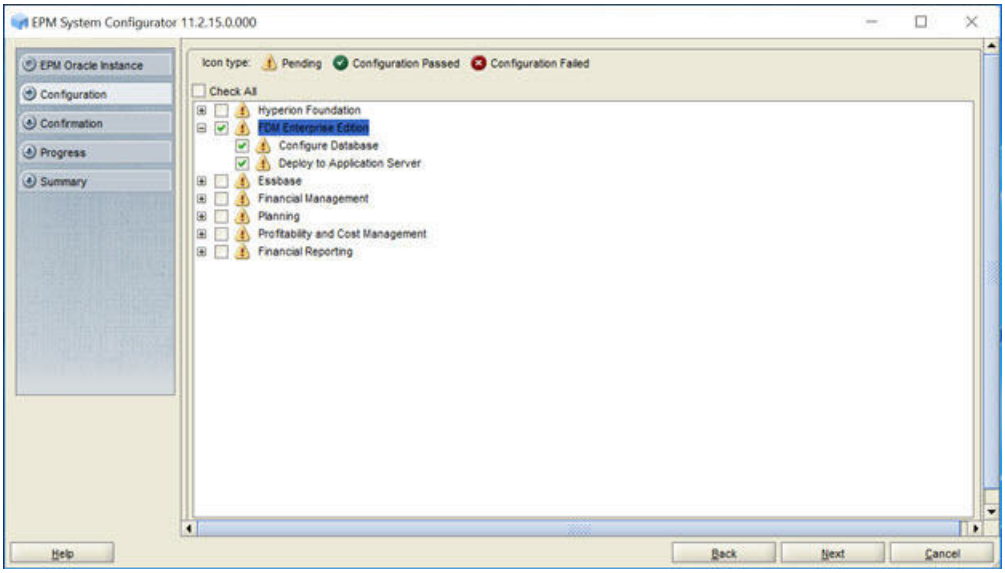


3. If you installed Oracle Hyperion Financial Data Quality Management, Enterprise Edition on the same server as Foundation Services, skip this step. Otherwise, on the Oracle Hyperion Shared Services Registry database configuration screen, select **Connect to a Previously Configured Shared Services Database**, 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 1), and then click **Next**.

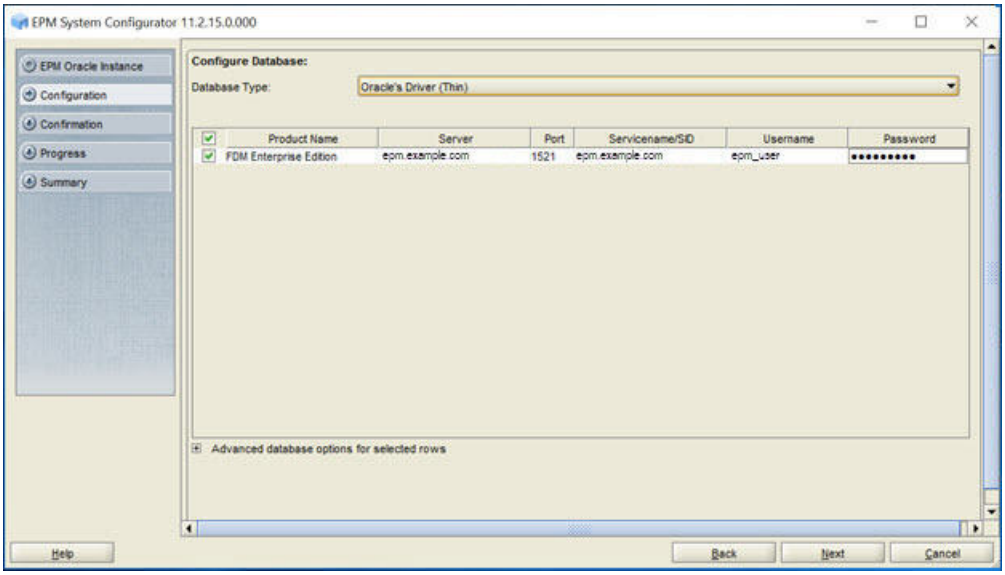
   The data that you enter must match the data that you entered while configuring the Shared Services Registry on the Foundation Services server (*FNDHOST1*).



4. In **Configuration**, perform the following steps, and then click **Next**.
   a. Clear the selection (uncheck) from **Uncheck All**.
   b. Select **FDM Enterprise Edition**.

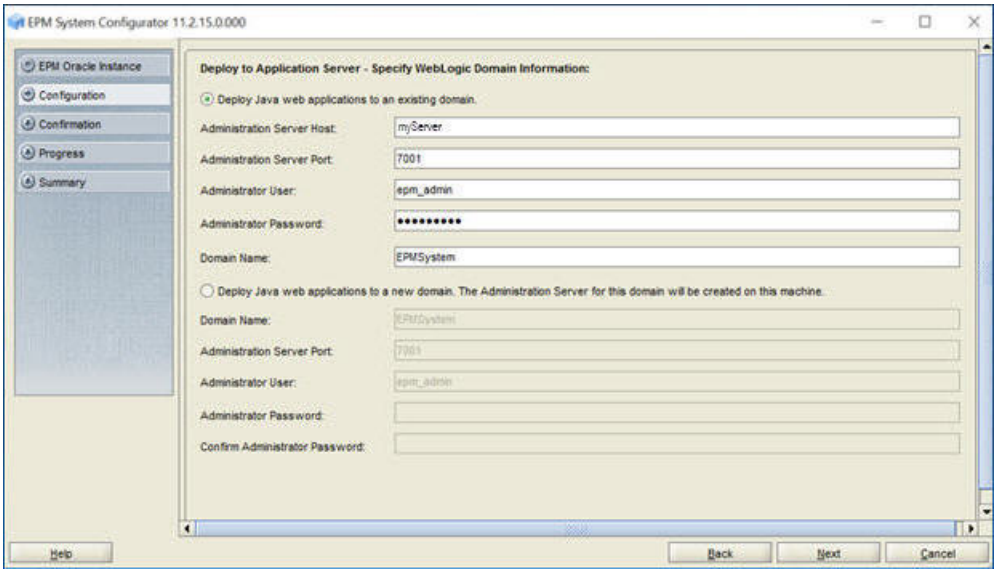


5. In **Configure Database**, click **Next** to use the default values to leverage the Foundation Services database for FDMEE.

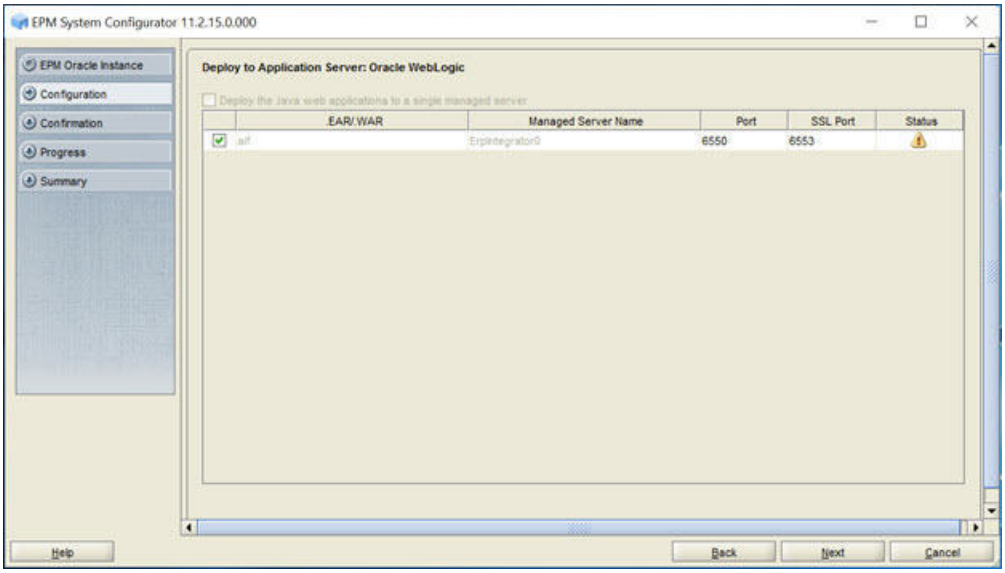


If you are configuring an additional instance of FDMEE, when you are prompted whether to drop and re-create the tables or reuse the existing database, select **Reuse the existing database**.

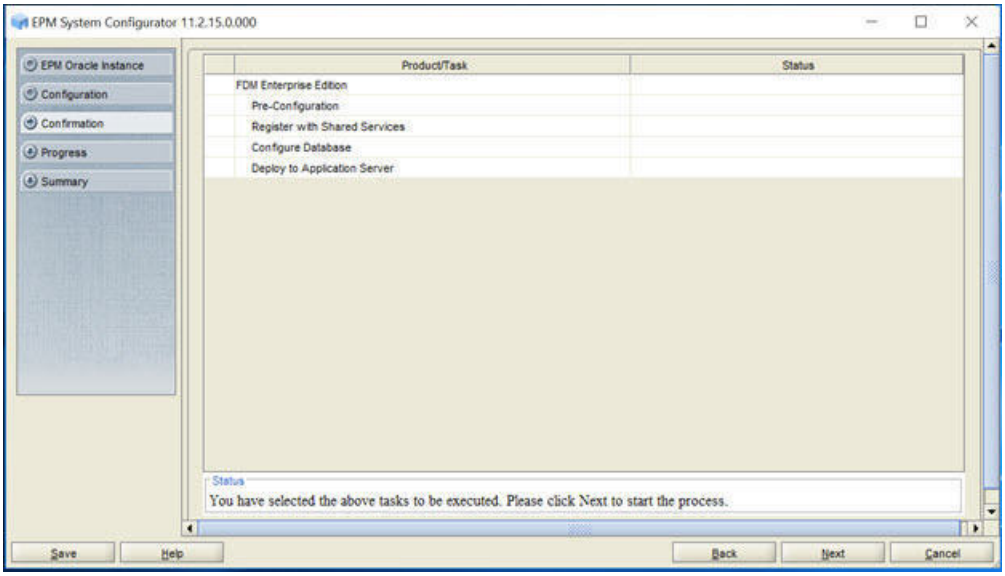
6. In **Deploy to Application Server - Specify WebLogic Domain Information**, click **Next** to deploy FDMEE to the Oracle WebLogic Server domain that you created on the Foundation Services host (*FNDHOST1*).



7. In **Deploy to Application Server: Oracle WebLogic**, click **Next** to deploy the FDMEE web application.



8. In **Confirmation**, review the summary of the configuration tasks that will be executed, and then click **Next**.



9. When the deployment process is complete, the **Summary** screen is displayed. Verify that all the tasks completed successfully, and then click **Finish**.

10. Start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

7

Reconfiguring the Web Server and Validating the Deployment

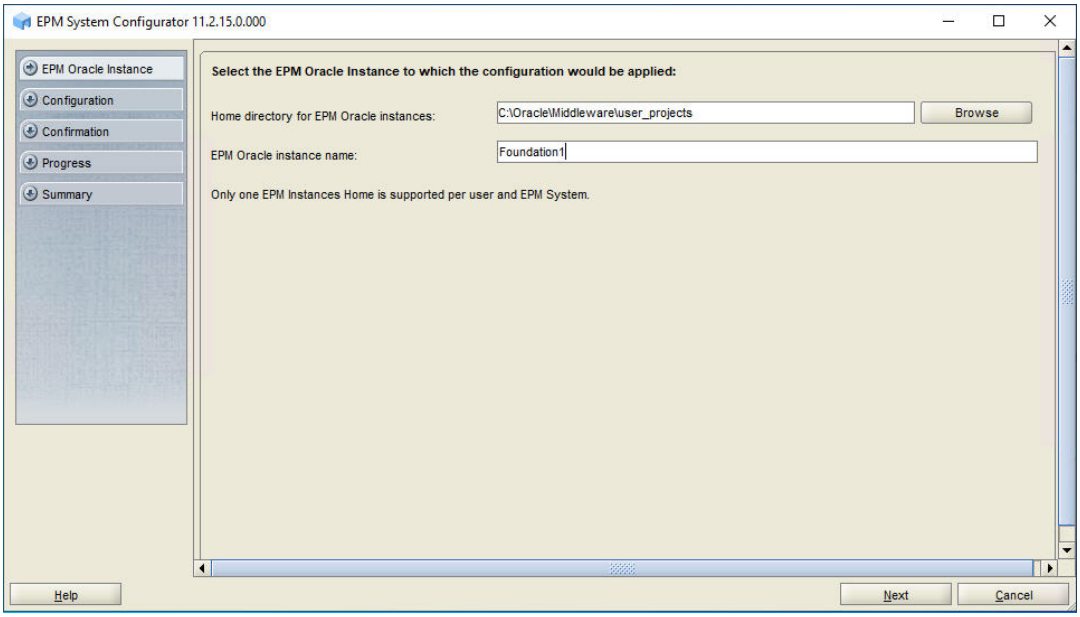
Related Topics

- Reconfiguring and Restarting the Web Server
- Refreshing EPM Workspace
- Validating the Deployment

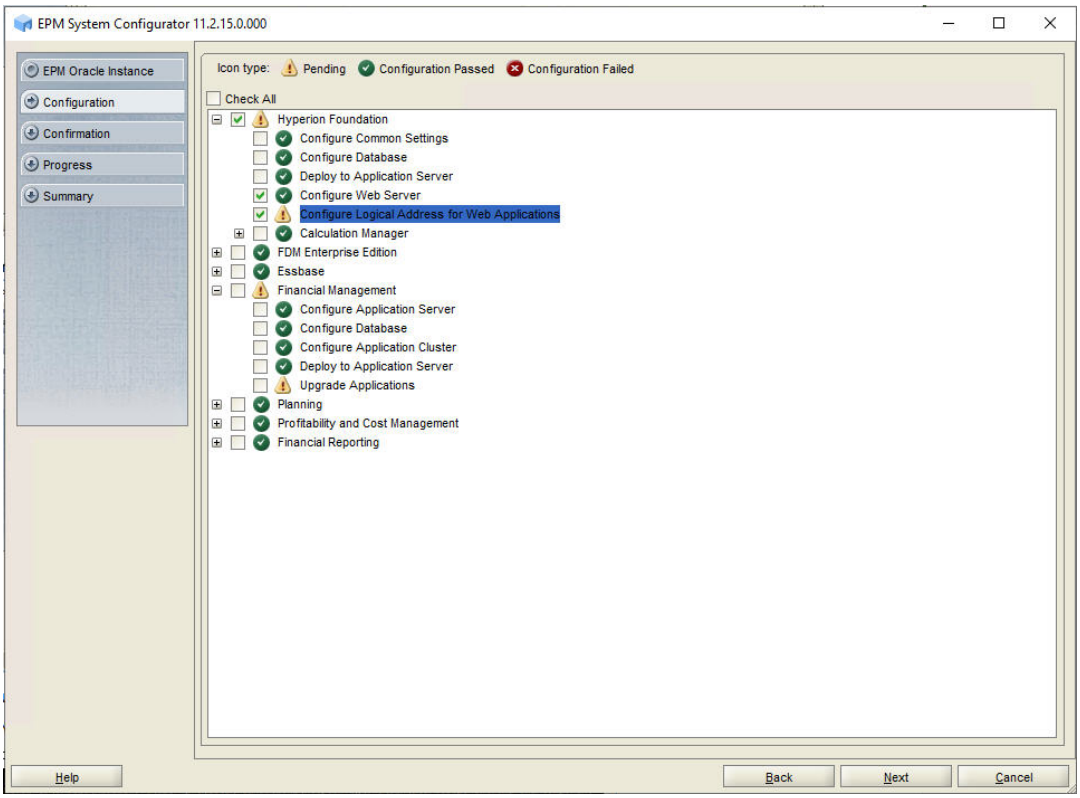
Reconfiguring and Restarting the Web Server

To reconfigure and restart Oracle HTTP Server:

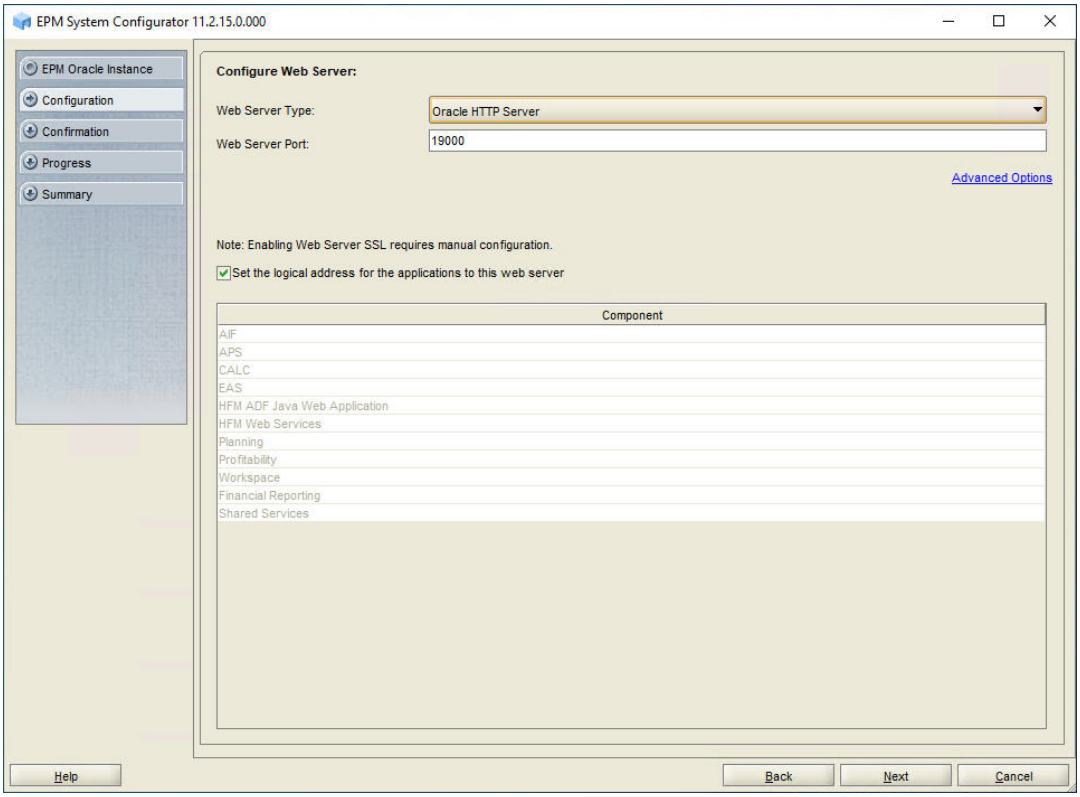
1. Stop Oracle HTTP Server: Launch `<Local Drive>:\Oracle\Middleware\user_projects\Foundation1\httpConfig\ohs\bin\stopComponent.cmd ohs_component`.
2. On the Oracle Hyperion Foundation Services host server (*FNDHOST1*), launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
3. In **EPM 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**, ensure that the instance name is **Foundation1**.



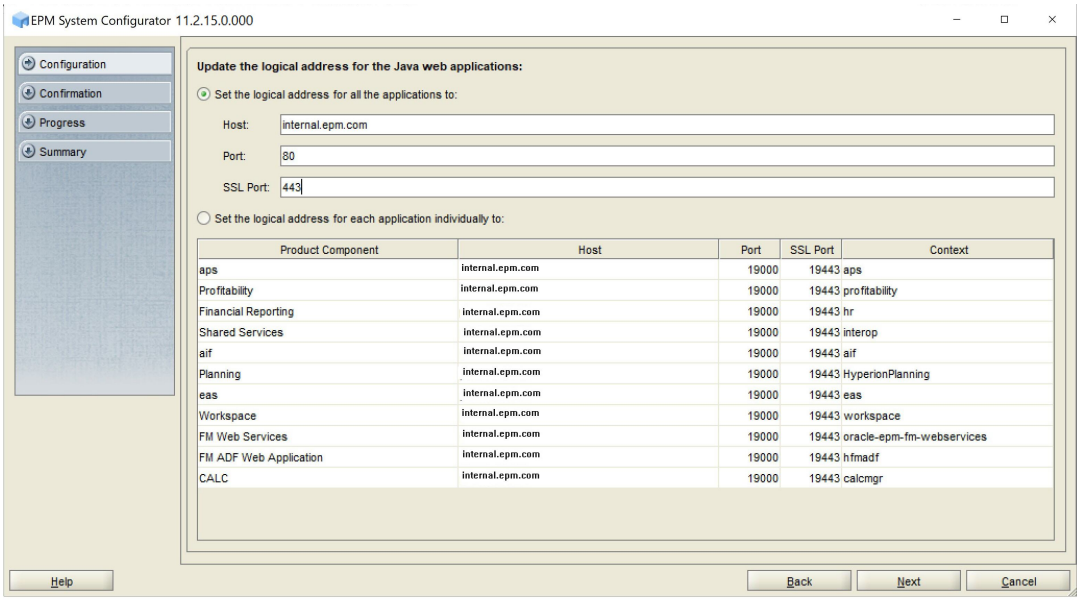
4. In **Configuration**, complete these tasks and then click **Next**.
   a. Clear the selection (uncheck) from **Uncheck All**.
   b. Expand **Hyperion Foundation**, select **Configure Web Server** and **Configure Logical Address for Web Applications**.



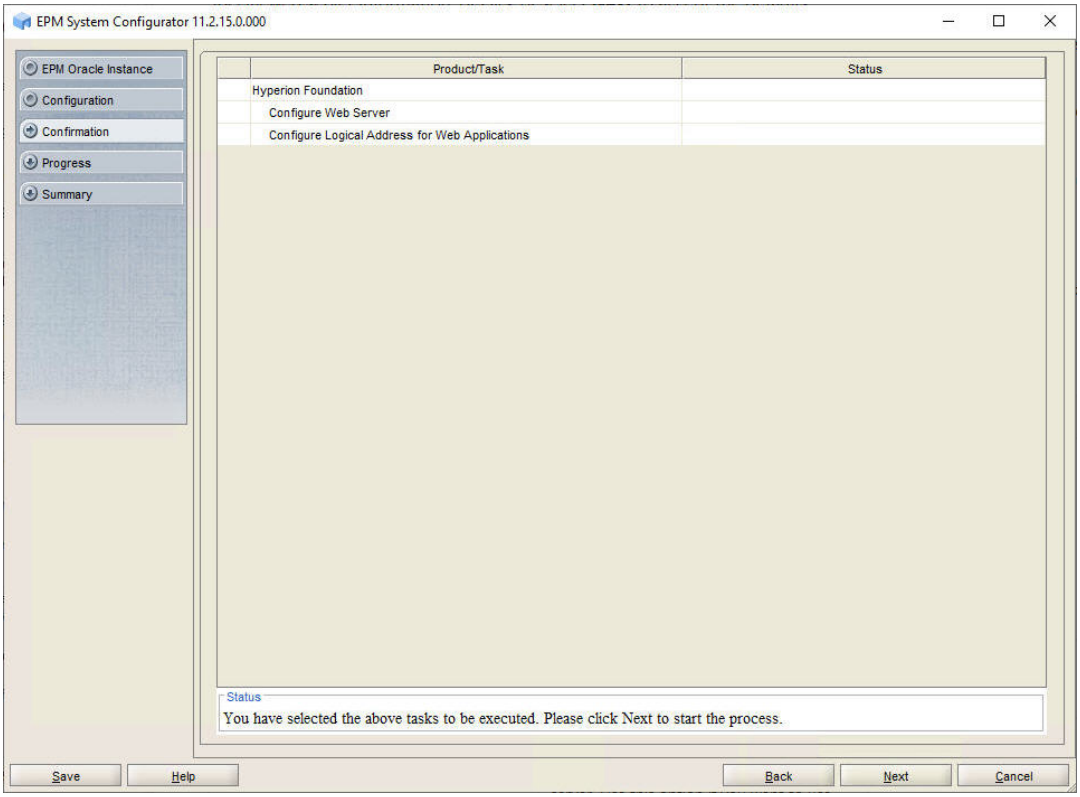
5. In **Configure Web Server**, click **Next**.



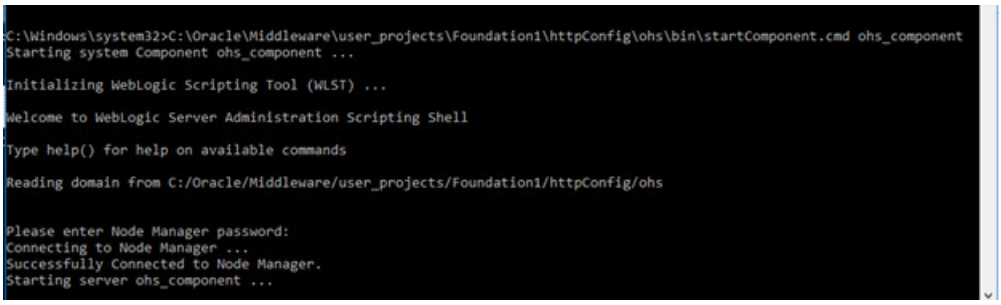
6. In **Update the logical web address for the Java web applications**, click **Next**.



7. In **Confirmation**, review the summary of the configuration tasks that will be executed, and then click **Next**.



8. On the Foundation Services host server (*FNDHOST1*), start Oracle HTTP Server: Launch `<Local Drive>:\Oracle\Middleware\user_projects\Foundation1\httpConfig\ohs\bin\startComponent.cmd ohs_component`, and then enter the WebLogic Admin password.



> **Note:**
>
> In multi-node configurations, modify the `httpd.conf` file (located under `MIDDLEWARE_HOME/user_projects/epmsystem1/httpConfig/ohs/config/fmwconfig/components/OHS/ohs_component/httpd.conf` on the load balancer server to direct the LCM proxy servlet to the same server instance of the FinancialClose server for subsequent requests (otherwise the requests from nodes are broadcasted in round-robin basis).
>
> ```
> Example:
> ProxyPass "/test" "balancer://mycluster" stickysession=JSESSIONID|
> jsessionid
> scolonpathdelim=On
> <Proxy "balancer://mycluster">
>  BalancerMember "http://192.168.1.50:80" route=node1
>  BalancerMember "http://192.168.1.51:80" route=node2
> </Proxy>
> ```

Refreshing EPM Workspace

To refresh Oracle Hyperion Enterprise Performance Management 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. On the Login screen, enter `admin` and the deployment password.

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

Validating the Deployment

Validating Essbase

To validate the Oracle Essbase installation:

1. If Essbase is not started, on *ESSHOST1*, start Oracle Enterprise Performance Management System: from the **Start**, select **Oracle EPM System**, and then **Start EPM System**.
2. Navigate to `ARBORPATH/bin` (for example, `<Local Drive>:/epm_data/bin`), and then 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

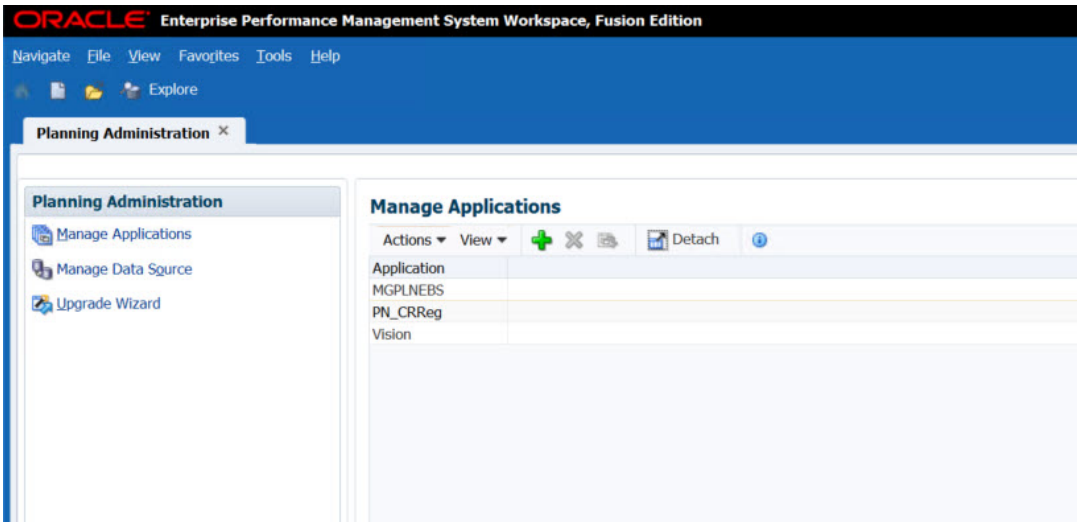
To validate Oracle Hyperion Planning, Oracle Hyperion Financial Management, Oracle Hyperion Profitability and Cost Management, and Oracle Hyperion Financial Data Quality Management, Enterprise Edition deployment:

1. Start Oracle Hyperion Enterprise Performance Management 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**.

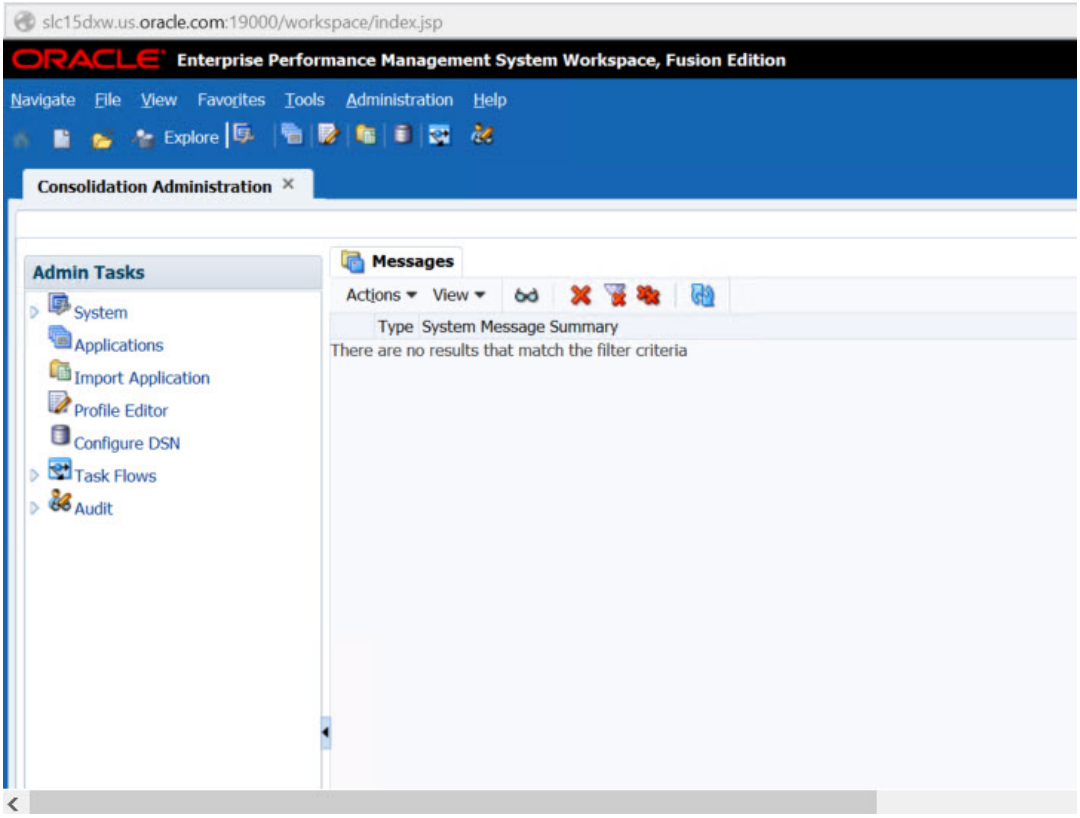
   Click **OK** if a warning about compatibility settings is displayed.



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

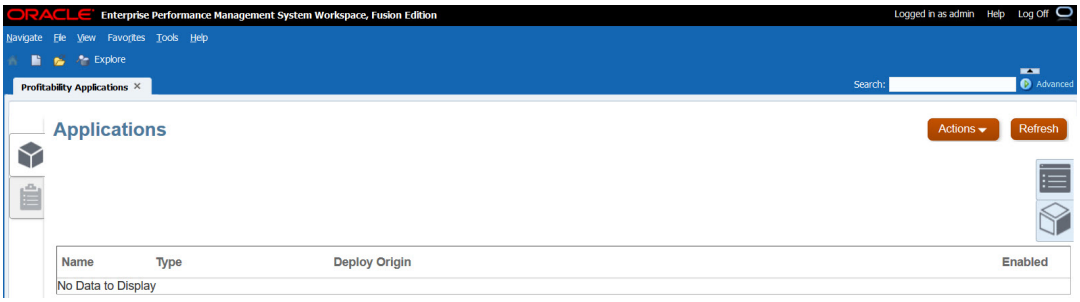
5. Click **OK** if a compatibility setting warning is displayed.

   The Consolidation Administration application opens.



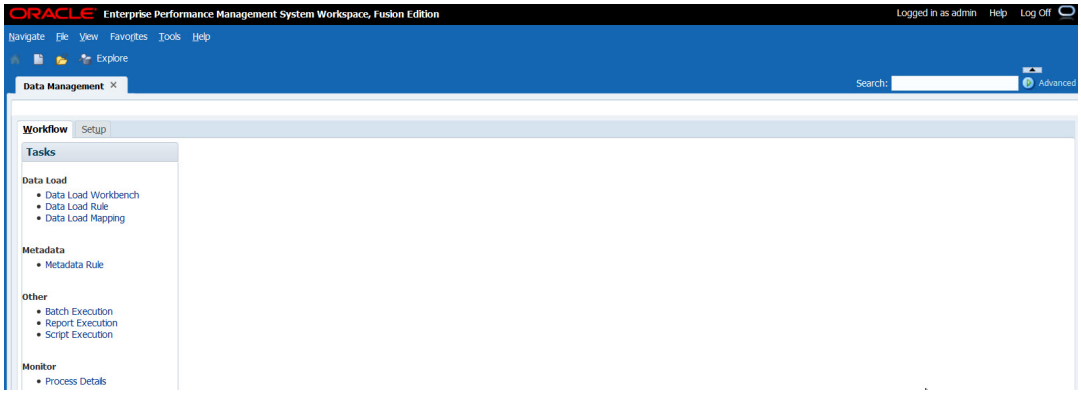
6. Select **Navigate**, then **Administer**, and then **Profitability Applications**.
7. Click **OK** if compatibility setting warning is displayed.

   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.


ORACLE Enterprise Performance Management System Workspace, Fusion Edition
Logged in as admin
Help
Log Off
Navigate
File
View
Favorites
Tools
Help
Explore
Data Management
Search:
Advanced
Workflow
Setup
Tasks
Data Load
Data Load Workbench
Data Load Rule
Data Load Mapping
Metadata
Metadata Rule
Other
Batch Execution
Report Execution
Script Execution
Monitor
Process Details

8

Scaling Out the Application Tier

Scale out as needed for your environment. When you scale out, you install and configure one or more additional instances of Oracle Enterprise Performance Management System components on another host.

Scaling Out Foundation Services

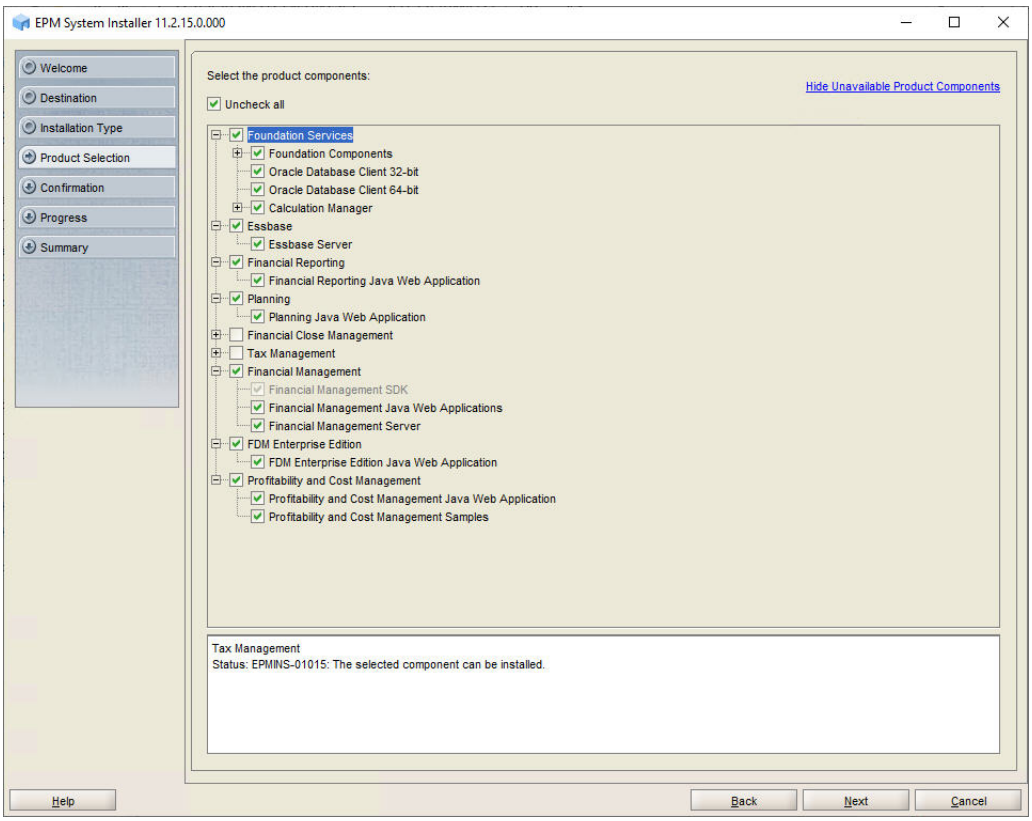
Complete this procedure on each host machine, for example, *FNDHOST2*, onto which Oracle Hyperion Foundation Services is to be scaled out.

To scale out Foundation Services:

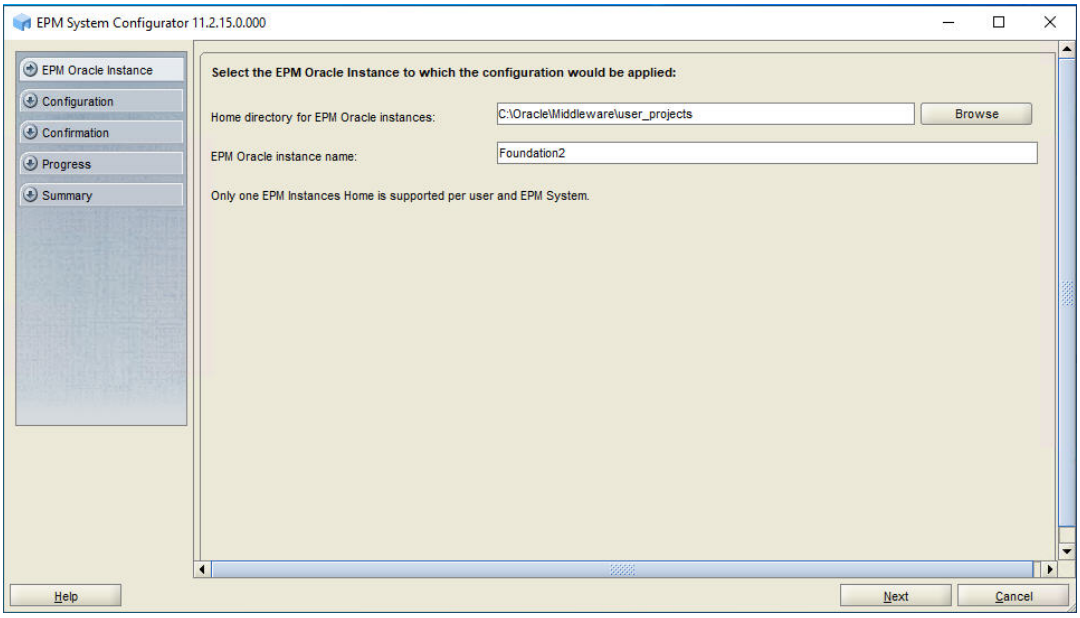
1. Log on to the Foundation Services scale-out machine (*FNDHOST2*) as the deployment user, and define a network drive (for example, `Z:/`) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, `//sharedhost/sharedlocation/downloads/epm_unzipped`).
2. From the mapped network drive, launch `installTool.cmd`.
3. 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 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 and all components listed under Foundation Services
     – Essbase—Essbase Server
     – Financial Reporting—Financial Reporting Java Web Application
     – Planning—Planning Java Web Application
     – Financial Management—Financial Management SDK (automatically selected)
     – Financial Management—Financial Management Java Web Applications
     – FDM Enterprise Edition—FDM Enterprise Edition Java Web Application
     – Profitability and Cost Management Java Web Application
     – Profitability and Cost Management Samples



4. In **Summary**, click **Finish** after verifying that all components installed successfully.
5. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *`FNDHOST2`*. Note these steps:
   - On the **Select Components** page, enter a unique prefix, for example `FNDHOST2`.
   - When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `FNDHOST2`.
6. Launch EPM System Configurator: Launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
7. In **EPM 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`.



8. On the **Set Up Shared Services and Registry Database Connection** screen, complete these steps:

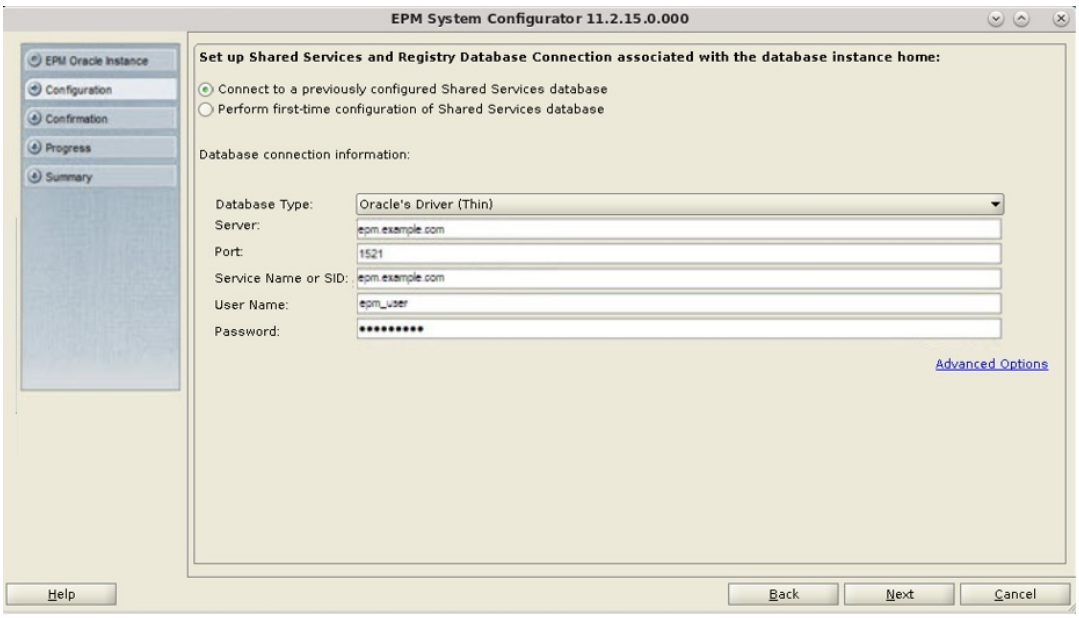
   a. Select **Connect to a previously configured Shared Services database**.

   b. Enter database connection information for Oracle Hyperion Shared Services Registry and the user name and password of the database account to use for accessing the database (recorded in Table 1). 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 **Set up Shared Services and Registry Database Connection** screen.

   The Shared Services Registry stores the configuration information for all the servers in the deployment so that components can find one another.



9. On the **Configuration** screen, complete these steps:
   a. Remove the selection (uncheck) from **Uncheck All**.
   b. Select these components From **Hyperion Foundation**:
      - **Scale out single managed server on this machine**
      - **Configure Web Server**
   c. Click **Next**.
10. 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*).
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. Start EPM System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.
14. 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 Oracle 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 Oracle Hyperion 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. Install Essbase Server on *ESSHOST2* using the instructions in Installing Essbase Server on ESSHOST1.

   In the steps, use *ESSHOST2* instead of *ESSHOST1* as the host name.
3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *ESSHOST2*. Note these steps:
   - On the **Select Components** page, enter a unique prefix, for example `ESSHOST2`.

- When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `ESSHOST2`.

4. Configure using the steps in Configuring Essbase on ESSHOST1.

5. On the scaleout machine, start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

Scaling Out Planning

To scale out Oracle Hyperion 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. Verify that you are logged on to the Planning scale-out machine (*`PLANHOST2`*) using the deployment user.
2. Install Planning using the instructions in Installing Planning on PLANHOST1.

   In the steps, use *`PLANHOST2`* instead of *`PLANHOST1`* as the host name.

3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *`PLANHOST2`*. Note these steps:

   - On the **Select Components** page, enter a unique prefix, for example `PLANHOST2`.
   - When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `PLANHOST2`.

4. Configure Planning using the steps in Configuring Planning on PLANHOST1.

   In the steps, use `PLANNING2` instead of `PLANNING1` as the instance name on this machine.

5. On the scaleout machine, start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

Scaling Out Financial Management

To scale out Oracle Hyperion 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.

To scale out Financial Management:

1. Verify that you are logged on to the Financial Management scale-out machine (*`HFMHOST2`*) using the deployment user.
2. Install Financial Management using the instructions in Installing Financial Management on HFMHOST1.

   In the steps, use *`HFMHOST2`* instead of *`HFMHOST1`* as the host name.

3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *`PLANHOST2`*. Note these steps:

   - On the **Select Components** page, enter a unique prefix, for example `HFMHOST2`.

- When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `HFMHOST2`.

4. Configure Financial Management using the steps in Configuring Financial Management on HFMHOST1.

   In the steps, use `HFM2` instead of `HFM1` as the instance name on this machine.

5. On the scaleout machine, start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

Scaling Out Profitability and Cost Management

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

To scale out Profitability and Cost Management:

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

2. Install Profitability and Cost Management and Oracle Hyperion Provider Services using the instructions in Installing Profitability and Cost Management on HPCMHOST1.

   In the steps, use *`HPCMHOST2`* instead of *`HPCMHOST1`* as the host name.

3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *`HPCMHOST2`*. Note these steps:

   - On the **Select Components** page, enter a unique prefix, for example `HPCMHOST2`.
   - When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `HPCMHOST2`.

4. Configure Profitability and Cost Management and Provider Services using the steps in Configuring Profitability and Cost Management on HPCMHOST1.

   In the steps, use `HPCM2` instead of `HPCM1` as the instance name on this machine.

5. On the scaleout machine, start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

Scaling Out FDMEE

Complete this procedure on each host machine; for example, *`FDMEEHOST2`*, onto which Oracle Hyperion Financial Data Quality Management, Enterprise Edition is to be scaled out.

To scale out FDMEE:

1. Verify that you are logged on to the FDMEE scale-out machine (*`FDMEEHOST2`*) using the deployment user.

2. Install FDMEE using the instructions in Installing FDMEE on FDMEEHOST1.

   In the steps, use *`FDMEEHOST2`* instead of *`FDMEEHOST1`* as the host name.

3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *`FDMEEHOST2`*. Note these steps:

   - On the **Select Components** page, enter a unique prefix, for example `FDMEEHOST2`.

- When modifying `RCUSchema.properties` in a text editor, for **schemaPrefix**, make sure to enter the unique prefix used on this machine, for example `FDMEEHOST2`.

4. Configure FDMEE using the steps in Configuring FDMEE on FDMEEHOST1.

   In the steps, use `FDMEE2` instead of `FDMEE1` 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**.

5. On the scaleout machine, start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.

Reconfiguring and Restarting the Web Server After Scaling Out

After scaling out, perform these steps:

1. Stop Oracle HTTP Server.
2. Reconfigure the Web Server in EPM System Configurator.
3. Restart Oracle HTTP Server.
4. Repeat these steps on each Oracle Hyperion Foundation Services host machine in your deployment.

For details on these steps, see Reconfiguring and Restarting the Web Server.

Refreshing EPM Workspace

If you scaled out Oracle Hyperion Foundation Services, refresh Oracle Hyperion Enterprise Performance Management 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. On the Login screen, enter `admin` and the deployment password.

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

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, `<Local Drive>:/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, `<Local Drive>:/Oracle/Middleware/user_projects/FOUNDATION1/diagnostics/reports/deployment_report_`*`YYYYMMDD_HHMMSS`*`.html`.

9

Installing EPM System Clients

Related Topics

- Installing Smart View
- Installing Administration Services Console

Installing Smart View

Oracle Smart View for Office must be installed on a machine that already has Microsoft Office 32-bit or Office 64-bit and .NET Framework installed.

To install Smart View on a client machine:

1. Close all Microsoft Office applications.
2. Browse to the shared drive location where you downloaded files, and then double-click `SmartView.exe` to start the installation wizard.
3. Select a destination folder for Smart View, and then click **OK**.
4. When installation is complete, click **OK**.

After you complete the installation, Smart View is available as a menu item in Microsoft Office products such as Microsoft Excel.

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), 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 Oracle Enterprise Performance Management 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. In **Summary**, click **Finish**.
6. Start Administration Services Console by selecting **Start**, then **Oracle EPM System**, 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.