

# Oracle® Enterprise Performance Management System

## Installation and Configuration Guide



Release 11.2.1.0.000

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The Oracle logo, consisting of the word "ORACLE" in white, uppercase, sans-serif font, centered within a solid red square.

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Oracle Enterprise Performance Management System Installation and Configuration Guide, Release 11.2.1.0.000

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Primary Author: EPM Information Development Team

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# Contents

## Documentation Accessibility

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## Documentation Feedback

---

### 1 About EPM System Product Installations

---

About EPM System Products	1-1
Assumed Knowledge	1-2
About Middleware Home, EPM Oracle Home, and EPM Oracle Instance	1-2
About the Shared Services Registry	1-3
Characters Supported for Installation and Configuration	1-3
EPM System Deployment Documentation	1-4
Deployment Paths	1-5
Perform Additional Configuration Options	1-5
Perform Ongoing Administration	1-5
Accessing Documentation	1-6

### 2 EPM System Architecture

---

About EPM System Architecture	2-1
Essbase Components	2-1
FDMEER Components	2-2
Financial Close Management Components	2-2
Stand-Alone Financial Close Management Deployment Requirements for Test and Production	2-3
Financial Management Components	2-3
Planning Components	2-4
Profitability and Cost Management Components	2-4
Financial Reporting Components	2-5
Tax Governance Components	2-5
Tax Provision Components	2-6

## 3 Preparing Your Environment

---

Preparing Servers	3-1
Applying Windows Updates	3-1
Resolving Port Conflicts	3-1
Disabling User Access Control	3-1
Synchronizing Clocks	3-2
Resolving Host Names	3-2
Disabling Anti-virus Software	3-2
Shared File System	3-2
Preparing User Accounts	3-2
Disk Space and RAM	3-3
Client Disk Space and RAM	3-3
Server Disk Space and RAM	3-4
Preparing a Database	3-5
Using an Oracle Database	3-6
Oracle Database Creation Considerations	3-6
Oracle Database Privileges	3-7
Oracle Database Sizing Guidelines	3-7
Oracle Database Configuration Considerations	3-9
Using an Existing Oracle Database Client	3-10
Using a Microsoft SQL Server Database	3-11
Microsoft SQL Server Database Creation Requirements	3-11
Microsoft SQL Server Roles and Privileges	3-11
Microsoft SQL Server Sizing Guidelines	3-11
Preparing Java Web Application Servers	3-13
WebLogic Server	3-13
Preparing Web Servers	3-13
Oracle HTTP Server	3-14
Microsoft Internet Information Services (IIS)	3-14
Verifying the IIS Installation	3-15
Using IIS in a Localized Environment	3-15
Preparing Web Browsers	3-15
Browser Settings	3-15
Support Matrix for High Availability and Load Balancing	3-16

## 4 Downloading Files for Installation

---

Downloading the Installation Files	4-1
------------------------------------	-----

## 5 Installing EPM System Products in a New Deployment

---

Installation Checklist for a New Installation	5-1
Installation Prerequisites and Requirements	5-5
Web Server Installation Prerequisites	5-6
Installation Sequence	5-7
Installing EPM System Products in a Distributed Environment	5-7
Installing EPM System Products	5-8
Welcome	5-10
Destination/Middleware Home	5-10
Installation Type	5-11
Product Selection	5-12
Confirmation	5-13
Saving Installation Selections	5-13
Progress	5-13
Summary	5-14
Performing Silent Installations	5-14
Loading Saved Selections	5-15
Modifying Response Files	5-15
Installing EPM System Clients	5-16
Client Installation Prerequisites	5-16
Downloading and Extracting Client Installers	5-16
Installing EPM System Clients	5-16
Installing EPM System Clients from EPM Workspace	5-17
Installing EPM System Clients From the Command Line	5-18
Performing Silent Client Installations	5-19
Installing and Updating Smart View Extensions	5-19

## 6 Configuring EPM System Products in a New Deployment

---

About EPM System Configurator	6-1
Configuration Prerequisites	6-1
Ensuring that Host Names Resolve	6-2
Creating Infrastructure Schemas Using Repository Creation Utility	6-2
Updating RCU Schema Properties	6-3
Configuration Sequence	6-4
Configuring Products in a Distributed Environment	6-5
Configuring Products in an SSL-Enabled Environment	6-6
Product Configuration Task Summary	6-7
Configuring EPM System Products	6-8
Refreshing EPM Workspace	6-11
EPM System Configurator Task Reference	6-11

Configure EPM Oracle Instance	6-12
Task Selection	6-12
Set Up Shared Services and Registry Database Connection	6-13
Deploy to Application Server — Specify WebLogic Domain Information	6-15
Deploy to Application Server: Oracle WebLogic	6-16
What Happens During Deployment: WebLogic Server	6-18
Configure Database	6-19
Setting Up Microsoft SQL Server Windows Authentication	6-19
Advanced Options for Database Configuration (Optional)	6-20
Foundation Configuration Tasks	6-20
Configure Common Settings	6-21
Configure Logical Address for Web Applications	6-25
Set Shared Services Admin User and Password	6-26
Scale Out Single Managed Server on This Machine	6-27
Configure Web Server	6-28
Essbase Configuration Tasks	6-29
Configure Essbase Server	6-29
Essbase Studio Default Data Files Location	6-33
Financial Reporting Configuration Tasks	6-34
Configure Financial Reporting RMI Ports	6-34
Planning Configuration Tasks	6-34
Configure Planning RMI Server	6-34
Financial Management Configuration Tasks	6-34
Financial Management — Configure Server	6-34
Financial Management — Configure Cluster	6-35
Financial Close Management Configuration Tasks	6-36
Financial Close Custom Settings	6-36
Configuration Summary	6-37
Performing Silent Configurations	6-37
What Happens During Configuration	6-39
Troubleshooting Configuration	6-39
Manually Configuring Oracle HTTP Server	6-40

## 7 Upgrading EPM System

---

About Upgrading	7-1
Supported Paths to Release 11.2	7-2
Upgrading Checklist	7-2
Upgrade Installation Prerequisites	7-7
Preparing Artifacts and Data for Upgrading	7-9
About Migrating from Performance Management Architect	7-10

Preparing Foundation Services Artifacts for Upgrading	7-11
Preparing Essbase Applications for Upgrading	7-12
Exporting Essbase Metadata from Performance Management Architect	7-13
Preparing Planning Applications for Upgrading	7-13
Preparing Classic Planning Applications for Upgrading	7-14
Preparing Performance Management Architect-Based Planning Applications for Upgrading	7-15
Preparing Profitability and Cost Management Artifacts for Upgrading	7-17
Preparing Standard Profitability and Detailed Profitability Applications for Upgrading	7-17
Preparing Management Ledger Applications for Upgrading	7-19
Preparing Financial Management Applications for Upgrading	7-19
Exporting Financial Management Metadata from Performance Management Architect	7-20
Preparing Tax Provision Applications for Upgrading	7-20
Preparing Financial Reporting Artifacts	7-20
Preparing Financial Close Management Artifacts for Upgrading	7-22
Preparing FDMEE Artifacts for Upgrading	7-22
Preparing Calculation Manager Artifacts for Upgrading	7-23
Downloading and Preparing Files for Installation	7-23
Installing EPM System Products for an Upgrade	7-24
Restoring the Financial Management Schema	7-24
Configuring EPM System Products for an Upgrade	7-24
Starting EPM System Services	7-24
Validating the Installation	7-25
Importing Artifacts and Data for Release 11.2	7-25
Importing Foundation Services Artifacts	7-25
Importing Essbase Applications	7-26
Importing Planning Applications	7-26
Importing Profitability and Cost Management Artifacts	7-27
Importing Standard Profitability and Detailed Profitability Applications	7-27
Importing Management Ledger Applications	7-29
Upgrading Financial Management Applications	7-29
Upgrading Tax Provision Applications	7-30
Importing Financial Reporting Artifacts	7-30
Migrating Financial Close Management Artifacts	7-31
Copying the Financial Close Management Schema (SQL Server)	7-32
Importing FDMEE Artifacts	7-33
Preparing the Data Export/Import and Migration Utilities	7-33
Migrating the FDMEE Schema (Oracle Database)	7-33
Migrating the FDMEE Schema (SQL Server)	7-34
Importing FDMEE Artifacts to Release 11.2	7-36

Additional Manual Steps for FDMEE	7-36
Importing Calculation Manager Artifacts	7-36
Importing Provisioning and Taskflows	7-36
Importing Performance Management Architect Application Metadata into Data Relationship Management	7-37
Exporting from Data Relationship Management and Importing to EPM Applications	7-38
Validating the Installation	7-39
Repeating the Upgrade Process for Applications	7-39
Upgrading EPM System Clients	7-39

## 8 Applying an Update to EPM System Products

---

About Applying an Update	8-1
Supported Paths to EPM System Release 11.2.1	8-1
Applying an Update Installation Checklist	8-2
Downloading and Extracting Installation Files	8-2
Applying an Update Prerequisite Tasks	8-2
Installing EPM System Products Using Apply Update	8-2

## 9 Performing Manual Configuration Tasks in a New Deployment

---

Financial Close Management and Tax Governance Manual Configuration Tasks	9-1
Start Managed Servers	9-2
Raising the Maximum Capacity in the Connection Pool	9-2
Increasing the Connection Pool of the External LDAP Provider	9-3
Configuring the WebLogic Domain to OID, MSAD, SunOne	9-4
Targetting Shared Libraries	9-5

## 10 Starting and Stopping EPM System Products

---

Starting and Stopping WebLogic Administration Server	10-1
Starting and Stopping EPM System Using a Single Script	10-2
Starting and Stopping Oracle HTTP Server	10-2
Launching Clients	10-3

## 11 Validating the Installation and Verifying Deployment

---

Validating the Installation	11-1
Prerequisites	11-1
Using EPM System Diagnostics	11-1
Diagnostics Performed	11-2
Generating a Deployment Report	11-3



Verifying Deployment	11-4
Verifying Shared Services Deployment	11-4
Verifying EPM Workspace Deployment and Products in EPM Workspace	11-4
Verifying Administration Services Deployment	11-5
Verifying Provider Services Deployment	11-5
Validating a Financial Close Management Deployment	11-5

## A Ports

---

Default Ports and Shared Services Registry	A-1
WebLogic Administration Server Port	A-1
Oracle Enterprise Manager Java Web Application Port	A-2
SSL Ports	A-2
Foundation Services Ports	A-2
Foundation Services Ports	A-2
Calculation Manager Java Web Application Ports	A-3
Essbase Ports	A-3
Essbase Ports	A-3
Administration Services Ports	A-4
Provider Services Ports	A-4
Essbase Studio Ports	A-4
Financial Reporting Ports	A-5
Financial Performance Management Applications Ports	A-5
Financial Management Ports	A-5
Financial Close Management Ports	A-6
Tax Management Ports	A-6
Planning Ports	A-6
Profitability and Cost Management Ports	A-6
Data Management Ports	A-7
FDMEE Ports	A-7
Data Relationship Management Ports	A-7

## B JDBC URL Attributes

---

JDBC Drivers	B-1
URL for Oracle RAC	B-2
LDAP-Based URL for Oracle Database	B-2
URL for SSL	B-2

## C EPM System Services

---

Web Server	C-1
------------	-----

Foundation Services Application Server	C-1
Calculation Manager Application Server	C-2
Essbase Server	C-2
Administration Services Server	C-4
Essbase Studio Server	C-4
Provider Services Application Server	C-4
Financial Reporting Application Server	C-5
Planning Application Server	C-5
Financial Management Server	C-6
Financial Management Application Server	C-7
Profitability and Cost Management Application Server	C-7
Financial Close Management Application Server	C-8
Tax Management Application Server	C-9
Data Relationship Management	C-9
Data Relationship Management Analytics	C-10
FDMEE Application Server	C-10

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# 1

## About EPM System Product Installations

### Related Topics

- [About EPM System Products](#)
- [Assumed Knowledge](#)
- [About Middleware Home, EPM Oracle Home, and EPM Oracle Instance](#)
- [About the Shared Services Registry](#)
- [Characters Supported for Installation and Configuration](#)
- [EPM System Deployment Documentation](#)

## About EPM System Products

Check the [Oracle Help Center](#) to see whether an updated version of this guide is available.

Oracle Enterprise Performance Management System products form a comprehensive Enterprise Performance Management system that integrates modular suites of financial management applications with the most comprehensive business intelligence capabilities for reporting and analysis. Major components of EPM System products:

- Oracle Hyperion Foundation Services
  - Foundation Services (includes Oracle Hyperion Shared Services and Oracle Hyperion Enterprise Performance Management Workspace)
  - Optionally, Oracle HTTP Server
  - Oracle WebLogic Server
  - Oracle Hyperion Calculation Manager
  - Oracle Smart View for Office
- Oracle Essbase
  - Essbase
  - Oracle Essbase Administration Services
  - Oracle Hyperion Provider Services
  - Oracle Essbase Studio
- Oracle Hyperion Financial Reporting
- Oracle's Hyperion Financial Performance Management Applications
  - Oracle Hyperion Planning
  - Oracle Hyperion Financial Management
  - Oracle Hyperion Profitability and Cost Management
  - Oracle Hyperion Financial Close Management

- Oracle Hyperion Tax Governance
- Oracle Hyperion Tax Provision
- Oracle's Data Management
  - Oracle Hyperion Financial Data Quality Management, Enterprise Edition
  - Oracle Data Relationship Management

## Assumed Knowledge

This guide is for administrators who install, configure, and manage Oracle Enterprise Performance Management System products. It assumes the following knowledge:

- Security and server administration skills
- Operating system administration skills
- Java web application server administration skills.
- A strong understanding of your organization's security infrastructure, including authentication providers such as Oracle Internet Directory, LDAP, or Microsoft Active Directory, and use of SSL
- A strong understanding of your organization's database and server environments
- A strong understanding of your organization's network environment and port usage

## About Middleware Home, EPM Oracle Home, and EPM Oracle Instance

### Middleware Home

A Middleware home consists of the Oracle WebLogic Server home, and, optionally, one or more Oracle homes, including EPM Oracle home. A Middleware home can reside on a local file system or on a remote shared disk that is accessible through Network File System (NFS).

The Middleware home location is defined during the first product installation on the computer. Subsequent installations on the computer use the previously defined location. The default installation directory is `Oracle/Middleware`. The Middleware home location is referred to as `MIDDLEWARE_HOME` throughout this document.

### EPM Oracle Home

An Oracle home contains installed files necessary to host a specific product, and resides within the directory structure of the Middleware home. The EPM Oracle home contains files for Oracle Enterprise Performance Management System products.

Components of EPM System products are installed in the EPM Oracle home directory under the Middleware home. The default EPM Oracle home location is `MIDDLEWARE_HOME/EPMSys11R1`. In addition, common internal components used by the products are installed in EPM Oracle home. Choose the location carefully to ensure that the location has enough disk space for all products that you are installing on the machine. You cannot change the location.

The EPM Oracle home location is defined in the system environment variable called `EPM_ORACLE_HOME`. The EPM Oracle home location is referred to as `EPM_ORACLE_HOME` throughout this document.

In a distributed environment, the EPM Oracle home directory structure must be the same on each machine.

### **EPM Oracle Instance**

An EPM Oracle instance contains one or more system components such as Oracle HTTP Server, Oracle Essbase Server, as well as one or more Java web applications in one or more domains. The directory structure of an Oracle instance is separate from the directory structure of the Oracle home. It can reside anywhere; it need not be within the Middleware home directory.

The default location for the EPM Oracle instance is `MIDDLEWARE_HOME/user_projects/epmsystem1`. The EPM Oracle instance location is referred to as `EPM_ORACLE_INSTANCE` throughout this document.

Java web applications are deployed to `MIDDLEWARE_HOME/user_projects/domains/domainName`.

Typically, if you are installing all products on a single machine, for the first product you configure, you create a new EPM Oracle instance. For each product after that, you modify the existing EPM Oracle instance. If you are installing in a distributed environment, create a new EPM Oracle instance on each machine.

## About the Shared Services Registry

The Oracle Hyperion Shared Services Registry is part of the database that you configure for Oracle Hyperion Foundation Services. Created the first time that you configure Oracle Enterprise Performance Management System products, the Shared Services Registry simplifies configuration by storing and reusing the following information for most EPM System products that you install:

- Initial configuration values such as database settings and deployment settings
- The computer names, ports, servers, and URLs you use to implement multiple, integrated, EPM System products and components
- Oracle Essbase failover content

Configuration changes that you make for one product are automatically applied to other products used in the deployment.

You can view and manage the contents of the Shared Services Registry using Lifecycle Management in the Oracle Hyperion Shared Services Console. See the *Oracle Enterprise Performance Management System Lifecycle Management Guide*.

## Characters Supported for Installation and Configuration

The following characters are supported during installation and configuration with EPM System Installer and EPM System Configurator.

**Table 1-1 Characters Supported for Installation and Configuration**

Fields	Supported Characters	Blocked Characters
PATH	Alphanumeric, dash (-), underscores (_), periods ( . ), and tildes (~). Tildes are supported only on Microsoft Windows.	All others
Host name	Alphanumeric, dash (-), and dot(.). Oracle Enterprise Performance Management System supports IPv6 addresses. However, during installation and configuration, you must enter the host name, not the IPv6 address.	All others
User name	Alphanumeric characters including non-English (extended and double-byte) characters, except for the blocked characters	+ * / # [ ] { } ( ) ; : , @ ! " -
Clusters, database names, and other general fields such as DSN names	Alphanumeric characters including non-English (extended and double-byte) characters, except for the blocked characters	+ . - * \ / # [ ] { } ( ) ; : , @ ! "
<i>MIDDLEWARE_HOME</i> , <i>EPM_ORACLE_HOME</i> and <i>EPM_ORACLE_INSTANCE</i>	For <i>MIDDLEWARE_HOME</i> : Alphanumeric characters, "_", "-", and "~" on Windows. For <i>EPM_ORACLE_INSTANCE</i> : Alphanumeric characters, "_", "-", The first character in every folder in the <i>EPM_ORACLE_INSTANCE</i> path must be a-z, A-Z, or 0-9.	Do not use any of the following symbols or symbol combinations in the directory that you specify for <i>EPM_ORACLE_HOME</i> or <i>MIDDLEWARE_HOME</i> during installation or <i>EPM_ORACLE_INSTANCE</i> during configuration:  /t  \t  \b  .

## EPM System Deployment Documentation

### Related Topics

- [Deployment Paths](#)
- [Accessing Documentation](#)



## Deployment Paths

Use this section to determine which deployment path to use and which installation documentation to use, depending on your needs.

**Table 1-2 Available Deployment Paths**

Base Deployment: Pick One	When to Choose This Option	Use This Guide
<b>New deployment</b>	Use for a new deployment.	<a href="#">Installing EPM System Products in a New Deployment</a> in <i>Oracle Enterprise Performance Management System Installation and Configuration Guide</i>
<b>Upgrade</b>	Use to upgrade from Release 11.1.2.4.xxx. Upgrade is installing to a new environment and migrating data and other artifacts.	<a href="#">Upgrading EPM System</a>

## Perform Additional Configuration Options

**Table 1-3 Perform Additional Configuration Options**

Task	Related Documentation
Perform additional deployment configuration options after completing a standard or custom deployment, such as scaling out or rehosting services	<i>Oracle Enterprise Performance Management System Deployment Options Guide</i>
Perform additional security configuration options after completing a standard or custom deployment, such as configuring user directories or reconfiguring to use SSL	<i>Oracle Enterprise Performance Management System Security Configuration Guide</i>

## Perform Ongoing Administration

**Table 1-4 Perform Ongoing Administration**

Task	Related Documentation
Perform security administration tasks, such as provisioning users and groups with the appropriate roles	<i>Oracle Enterprise Performance Management System User Security Administration Guide</i>
Migrate applications from one environment to another, such as from test to production	<i>Oracle Enterprise Performance Management System Lifecycle Management Guide</i>
Troubleshoot problems with your deployment	<i>Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide</i>

**Table 1-4 (Cont.) Perform Ongoing Administration**

<b>Task</b>	<b>Related Documentation</b>
Create a backup of product and application data	<i>Oracle Enterprise Performance Management System Backup and Recovery Guide</i>

## Accessing Documentation

Find the latest Oracle Enterprise Performance Management System installation and product guides in the Oracle Help Center (<https://docs.oracle.com/en/>). To access documents to view or download, click the Applications icon. In the Applications Documentation window, select the Enterprise Performance Management tab, and then look for your release in the Enterprise Performance Management list.

You can also find deployment-related documentation on the Oracle Technology Network (<http://www.oracle.com/technetwork/index.html>) and on the Oracle Software Delivery Cloud website ([http://edelivery.oracle.com/EPD/WelcomePage/get\\_form](http://edelivery.oracle.com/EPD/WelcomePage/get_form)).

# 2

## EPM System Architecture

### Related Topics

- [About EPM System Architecture](#)
- [Essbase Components](#)
- [FDMEE Components](#)
- [Financial Close Management Components](#)
- [Financial Management Components](#)
- [Planning Components](#)
- [Profitability and Cost Management Components](#)
- [Financial Reporting Components](#)
- [Tax Governance Components](#)
- [Tax Provision Components](#)

### About EPM System Architecture

Oracle Enterprise Performance Management System is a multi-tier application environment that mainly utilizes thin-client architecture for end-user access, requiring only a supported browser on the client machine. Network traffic between the client and middle-tier server(s) generally does not exceed more than normal web traffic.

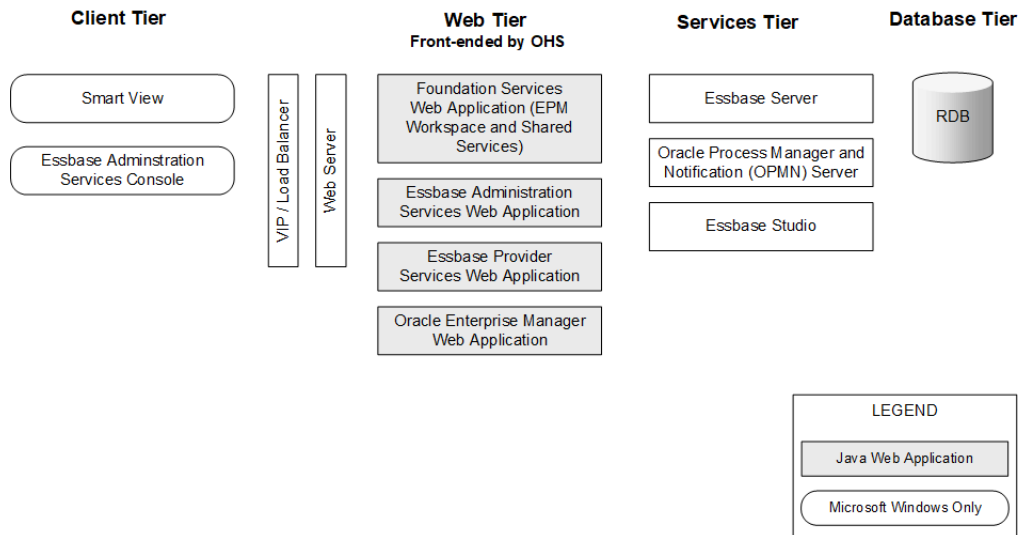
A middle-tier application server is required. Oracle WebLogic Server is provided with a default installation.

The data tier is comprised of two components that store data differently. In Oracle Essbase environments, the data is stored and calculated in the database on the server file system. In Oracle Hyperion Financial Management environments, the application framework, metadata, and textual data are stored in a relational repository.

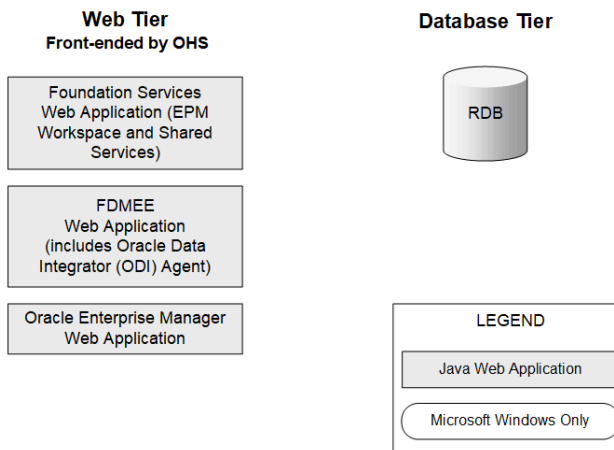
#### Tip:

For optimum viewing of the component architecture diagrams in PDF format, try increasing the view magnification to 120%.

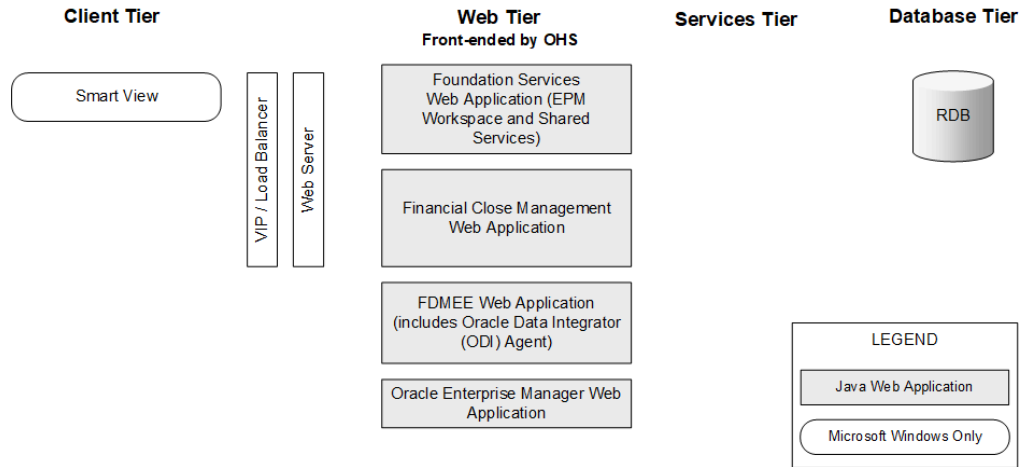
### Essbase Components



## FDMEE Components



## Financial Close Management Components



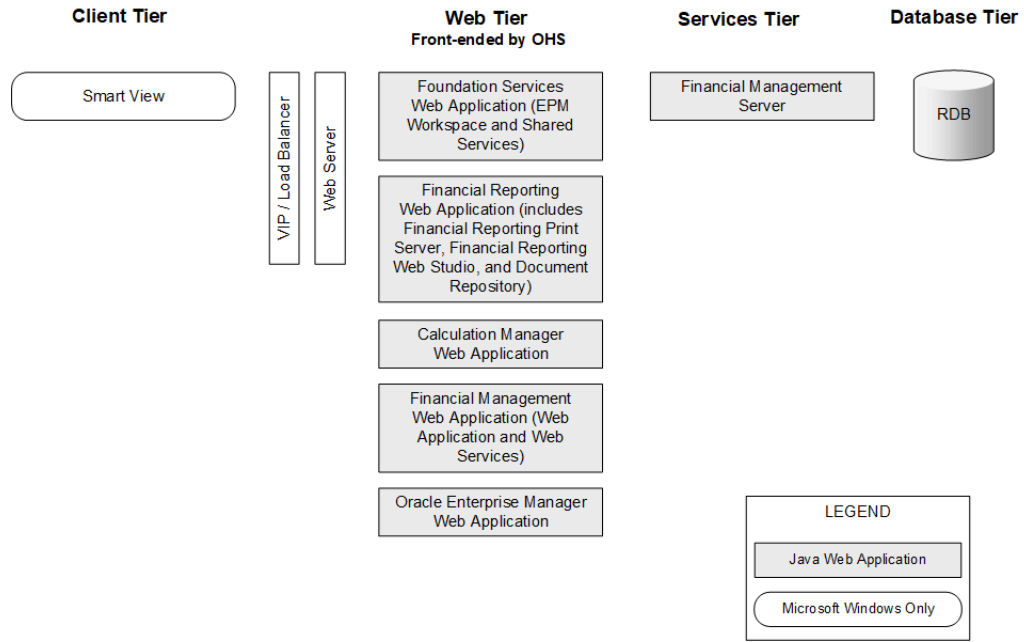
## Stand-Alone Financial Close Management Deployment Requirements for Test and Production

A stand-alone version of Oracle Hyperion Financial Close Management can be deployed independently of other Oracle Enterprise Performance Management System products in a two-server deployment as specified below. The following specification supports 500 users (175 active).

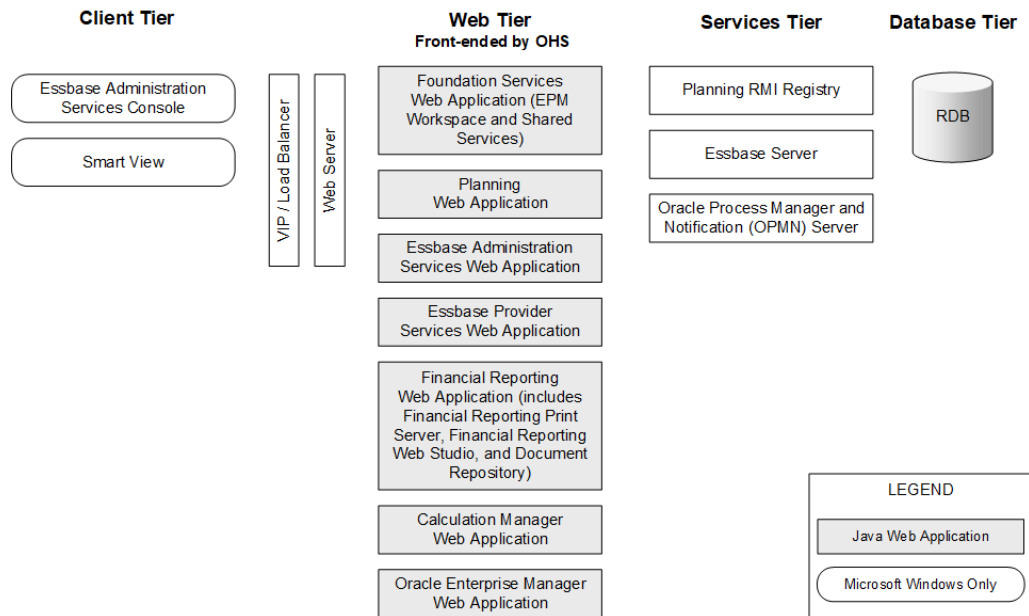
**Table 2-1 Financial Close Management Deployment Specifications**

Machine	Products	Processor/Memory
Server 1	<ul style="list-style-type: none"> <li>WebLogic Admin Server</li> <li>Oracle Hyperion Foundation Services Java Web application (Oracle Hyperion Enterprise Performance Management Workspace and Oracle Hyperion Shared Services)</li> <li>Oracle HTTP Server</li> </ul>	4 Core 2 CPU – 16GB
Server 2	<ul style="list-style-type: none"> <li>Financial Close Management Java Web application</li> <li>Oracle Hyperion Financial Data Quality Management, Enterprise Edition Java Web application</li> </ul>	4 Core 2 CPU – 16GB

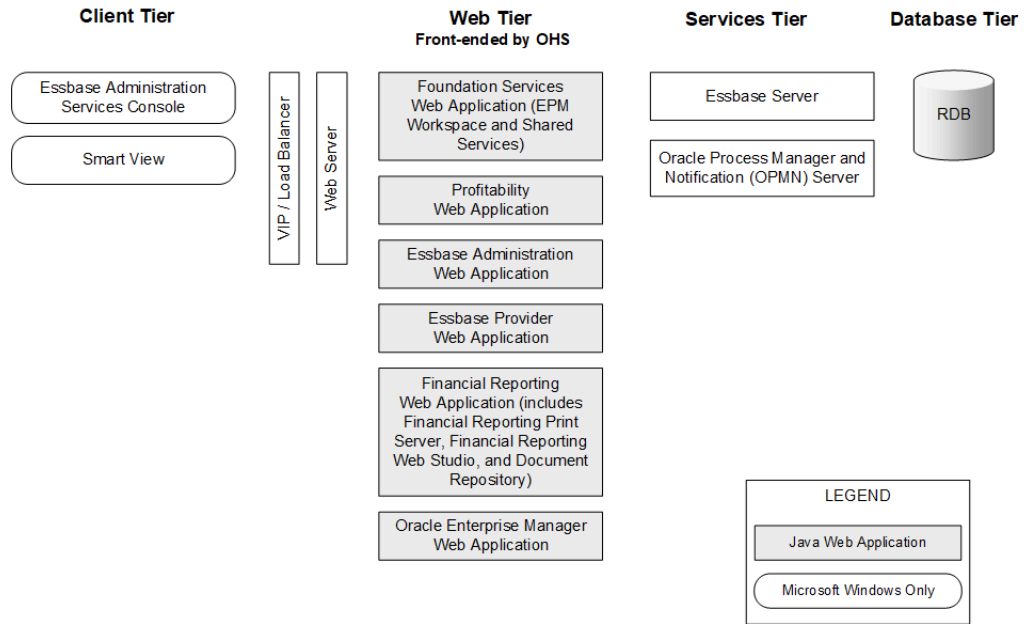
## Financial Management Components



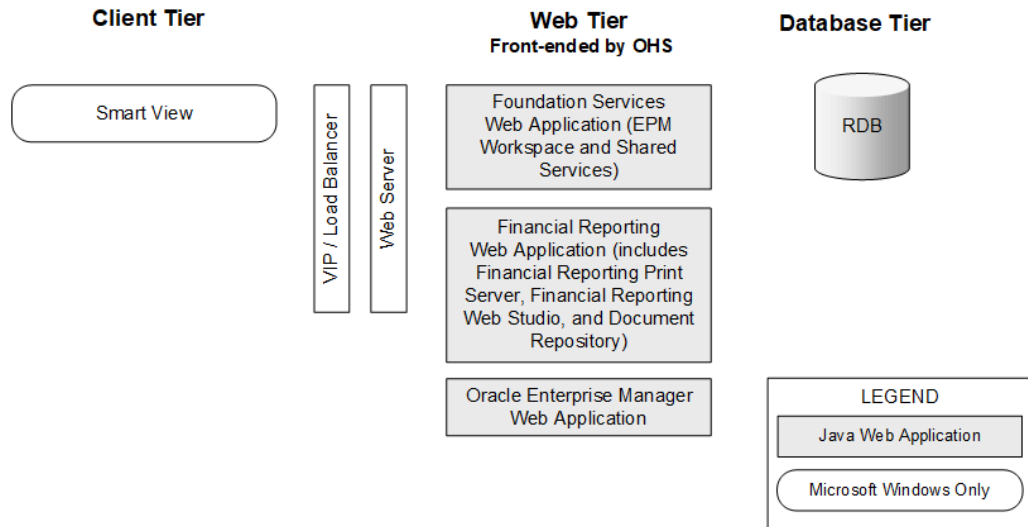
## Planning Components



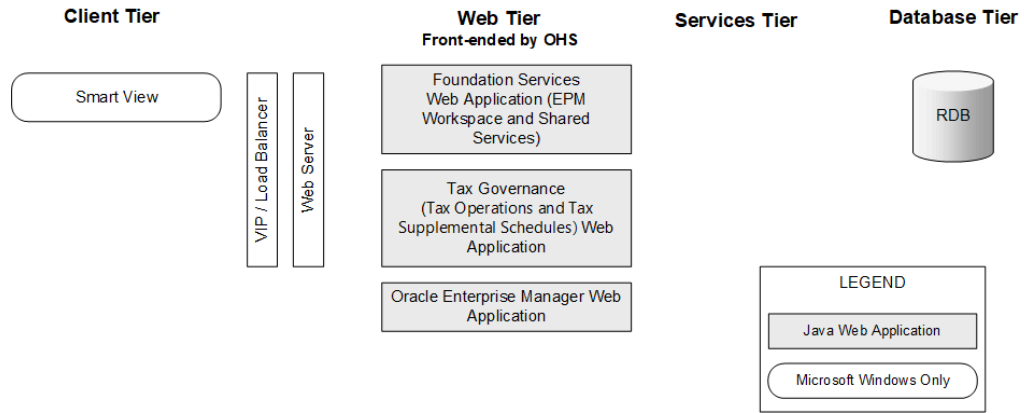
## Profitability and Cost Management Components



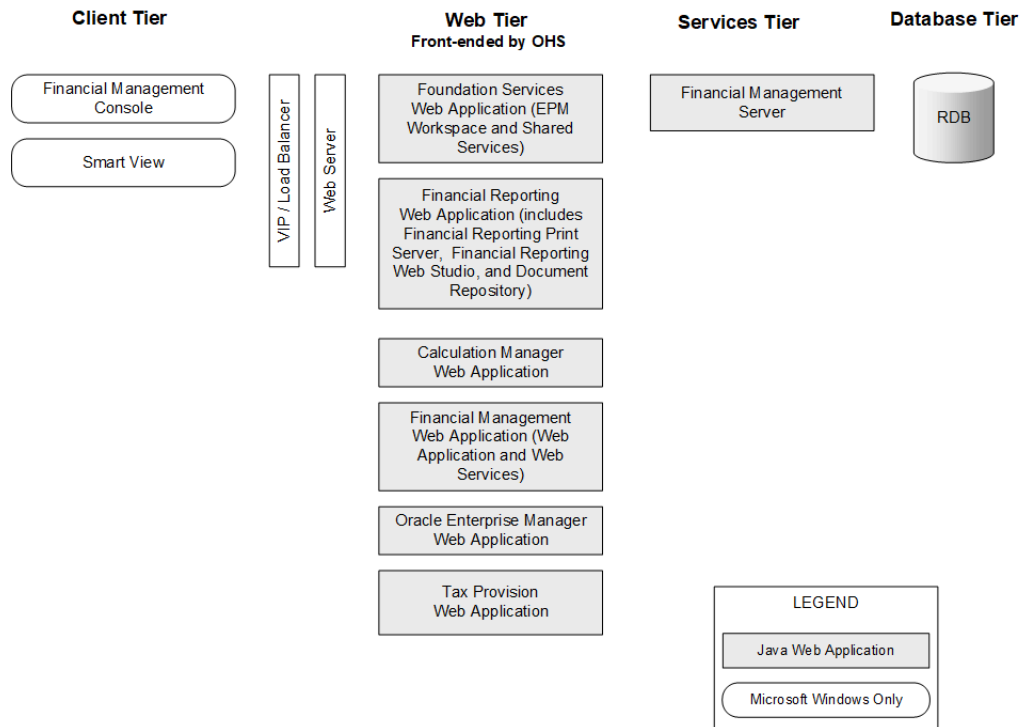
## Financial Reporting Components



## Tax Governance Components



## Tax Provision Components





# 3

## Preparing Your Environment

### Related Topics

- [Preparing Servers](#)
- [Preparing User Accounts](#)
- [Disk Space and RAM](#)
- [Preparing a Database](#)
- [Preparing Java Web Application Servers](#)
- [Preparing Web Servers](#)
- [Preparing Web Browsers](#)
- [Support Matrix for High Availability and Load Balancing](#)

## Preparing Servers

### Related Topics

- [Applying Windows Updates](#)
- [Resolving Port Conflicts](#)
- [Disabling User Access Control](#)
- [Synchronizing Clocks](#)
- [Resolving Host Names](#)
- [Disabling Anti-virus Software](#)
- [Shared File System](#)

## Applying Windows Updates

For each server in the deployment, apply Windows updates and reboot before installing and configuring.

## Resolving Port Conflicts

For information about default port numbers for Oracle Enterprise Performance Management System products, including where the port can be configured, see [Ports](#).

## Disabling User Access Control

Disable User Access Control (UAC) on each Windows server in the deployment. This can be done through User Accounts in the Control Panel by clicking on Change User Account Control Settings, and then dragging the slider to Never notify.

UAC must remain disabled in order for Oracle Enterprise Performance Management System server components to function properly. UAC can be enabled on end-user client desktops.

## Synchronizing Clocks

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

## Resolving Host Names

The canonical host name of each server must be the same when accessed from within the server and from other servers in the deployment. You may want to create a local hosts file on each server to resolve host name issues.

Oracle Enterprise Performance Management System uses Java's canonical host name resolution for resolving host names. To validate host names as resolved by Java, EPM System provides a utility (`epmsys_hostname.bat|sh`). An archive of the utility (`epmsys_hostname.zip`) is available in `EPM_ORACLE_HOME/common/config/11.1.2.0`. Run the utility after installation and before configuration.

## Disabling Anti-virus Software

Antivirus software can cause performance issues with EPM System products if, each time you access any resource on the server, the antivirus software tries to open and scan the object. To prevent these issues, exclude the EPM Oracle home directory from automatic antivirus scans and scan this directory only at scheduled times.

## Shared File System

If you are configuring for high availability, you must set up a shared file system using UNC syntax that is accessible from all the servers in the deployment for Oracle Hyperion Enterprise Performance Management System Lifecycle Management artifacts.

Optionally, you can also use the shared file system for the following:

- Installation files downloaded from Oracle Software Delivery Cloud
- Oracle HTTP Server configuration files to simplify configuration in a distributed environment
- Oracle Hyperion Financial Data Quality Management, Enterprise Edition application data
- Oracle Essbase Studio sample and customer data source text files

## Preparing User Accounts

Windows:

- Do not use the Administrator user to install and configure. Run EPM System Installer and EPM System Configurator as a user with administrator rights. Install

and configure as an administrator and as the same user for all Oracle Enterprise Performance Management System products.

- Assign local policies if required by your product. For Windows, the user ID typically requires “Act as part of the OS, Bypass Traverse Checking, Log on as a batch job, and Log-on as a service.”
- The user installing EPM System must have full access to *Drive:/Temp* and *Drive:/Windows/Temp*.
- When you patch this server, use the same user account that was used to install and configure the earlier release.

The password for the account used to install and configure must conform to the following guidelines:

- Contain at least one uppercase letter
- Contain at least one numeral
- Be at least eight characters long

## Disk Space and RAM

This section describes client and server disk space and RAM requirements for Oracle Enterprise Performance Management System products.

### Client Disk Space and RAM

Disk space and RAM requirements are approximate. The installation program checks for twice the required disk space, based on your product installation choices.

The recommended RAM requirement for all clients is 1 GB.

#### Note:

Web browser clients have no disk space requirements beyond those of the web browser.

Product Family	Component	Disk Space (Minimum) <sup>1</sup>	Notes
EPM System Installer	EPM System Installer and all Oracle Enterprise Performance Management System product assemblies	16 GB	After installation, the installation files and assemblies can be removed.
Foundation Services	Common client components	400 MB	
	Oracle Smart View for Office for Office	100 MB	
Oracle Essbase	Essbase Runtime Client	150 MB	
	Oracle Essbase Administration Services Console	300 MB	

<sup>1</sup> Disk space does not include the common client components installed on the machine with Oracle Hyperion Foundation Services.

## Server Disk Space and RAM

Disk space and RAM requirements are approximate and do not include additional possible requirements on the machine. The installation program checks for twice the required disk space, based on your product installation choices. Disk space estimates include documentation help files (if applicable) and Oracle Enterprise Performance Management System components.

Component	Disk Space (Minimum)	RAM (Minimum)
Oracle WebLogic Server (includes WebLogic, JDK, utils, JRockit, and Modules)	1.4 GB	500 MB
Oracle HTTP Server (optional component)	1.2 GB	1 GB
Common Oracle libraries	900 MB	NA
Oracle Hyperion Shared Services	800 MB <sup>1</sup>	1.5 GB
Oracle Hyperion Calculation Manager	45 MB	256 MB
Oracle Essbase Server	2 GB	1 GB
Application Programming Interface	40 MB	256 MB
Oracle Essbase Administration Services	1 GB <sup>2</sup>	32 MB multiplied by the number of concurrent Administration Services users  For example, 32 MB * 10 users = 320 MB
Oracle Hyperion Provider Services	680 MB	340 MB
Oracle Essbase Studio Server	120 MB	256 MB
Oracle Hyperion Financial Reporting	400 MB	1 GB
Oracle Hyperion Financial Management Server	64 GB (10 GB available)	4 GB
Database Server for Financial Management	24 GB	4 GB
Oracle Hyperion Financial Close Management	8 GB	4GB. A user base of 200 concurrent active users can be supported with a JVM memory allocation of 4GB. A small user base of 10 to 15 concurrent active users can be supported with a JVM memory allocation of only 650MB.  For additional details, see the <i>Oracle Hyperion Financial Close Management Performance Tuning Guide</i> , which can be found on Oracle Support by searching for document ID 1575381.1

Component	Disk Space (Minimum)	RAM (Minimum)
Oracle Hyperion Tax Governance	8 GB	4GB. A user base of 200 concurrent active users can be supported with a JVM memory allocation of 4GB. A small user base of 10 to 15 concurrent active users can be supported with a JVM memory allocation of only 650MB.  For additional details, see the <i>Oracle Hyperion Financial Close Management Performance Tuning Guide</i> , which can be found on Oracle Support by searching for document ID 1575381.1
Oracle Hyperion Tax Provision	64 GB (10 GB available)	4 GB
Oracle Hyperion Planning	8 GB (10 GB available)	2 GB
Oracle Hyperion Profitability and Cost Management	8 GB	2 GB
Oracle Hyperion Financial Data Quality Management, Enterprise Edition	300 MB	2 GB
Oracle Data Relationship Management Database Server	15 GB	2 GB
Data Relationship Management Application Server	500 MB	2 GB

- <sup>1</sup> This number is for the base Shared Services installation. If using Lifecycle Management functionality, Oracle recommends that you significantly increase disk space because application artifacts are exported and stored in the Shared Services file system.
- <sup>2</sup> Allow extra disk space for data files and outline files that are copied to Administration Services during data loading and outline editing, respectively.

 **Note:**

For data storage and binary installation, Essbase supports the use of a disk array device.

## Preparing a Database

Before you install and configure most Oracle Enterprise Performance Management System products, create a database using a supported RDBMS.

In general, the database should be in the same data center as the EPM System deployment. To prevent timeout issues when configuring with EPM System Configurator, you cannot locate a database in a remote location where there is latency.

For simplicity and ease of deployment, you can use one database repository for all products (with the exceptions noted below). In most cases, configure separate databases for products. Consider performance, rollback procedures for a single application or product, and disaster recovery plans.

Each Oracle Essbase Studio Server instance must have its own catalog database.

The following products and product components require unique databases:

- Oracle Hyperion Planning – Each Planning application should have its own repository.
- Oracle Data Relationship Management. See the *Oracle Hyperion Data Relationship Management Installation Guide*.

The following products must use the same database schema:

- Oracle Hyperion Financial Close Management
- Oracle Hyperion Tax Governance
- Account Reconciliation Manager
- Supplemental Data Manager
- Tax Supplemental Schedules

## Using an Oracle Database

This section includes information about Oracle database installation, database creation, required roles and privileges, sizing guidelines, and configuration.



### Note:

EPM System Installer installs the Oracle Database client automatically if it is required on a machine (Windows only). To use an existing Oracle Database client, see [Using an Existing Oracle Database Client](#).

## Oracle Database Creation Considerations

The database **must** be created using Unicode Transformation Format UTF-8 encoding (character set). Oracle supports the following character sets with UTF-8 encoding:

- AL32UTF8 (UTF-8 encoding for ASCII platforms)
- UTF8 (backward-compatible encoding for Oracle)
- UTFE (UTF-8 encoding for EBCDIC platforms)

Oracle recommends that you add a prefix to the user name that will correspond to the RCU schema prefix used during configuration.

 **Note:**

For Oracle Data Relationship Management, the database needs to use these database parameters:

- NLS\_NCHAR\_CHARACTERSET AL16UTF16
- NLS\_CHARACTERSET AL32UTF8

For optimal performance, when cloning schemas in a Data Relationship Management environment, Oracle recommends the use of `datapump` over copying schemas using the Data Relationship Management Console repository wizard.

## Oracle Database Privileges

The following privileges must be granted to the owners of the database schemas:

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

 **Tip:**



Optionally, you can specify unlimited quota for EPM schemas.

## Oracle Database Sizing Guidelines

Oracle recommends that you set tablespaces with Auto Extend ON.

The following table describes the Oracle Database sizing guidelines.

Product	Sizing Guideline
Oracle Hyperion Shared Services & Oracle Hyperion Enterprise Performance Management Workspace	Start with 100 MB, and add more as the number of migrations with Lifecycle Management and the number of audit records increases.

Product	Sizing Guideline
Oracle Essbase Administration Services	The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Oracle Essbase Studio	The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Oracle Hyperion Financial Reporting	<p>The amount of space needed depends on the aggregate size of the objects that you plan to store in the repository.</p> <p>Oracle recommends starting with at least 250 MB, which provides space to expand the Document Repository without having to increase the data file or tablespace. A shared pool size of 60 MB is used during configuration with EPM System Configurator.</p>
Oracle Hyperion Planning and Oracle Hyperion Calculation Manager	<ul style="list-style-type: none"> <li>• 100 MB for applications with 5,000 or fewer total members</li> <li>• 200 MB for applications with 15,000 or fewer total members</li> </ul>
	<div style="border: 1px solid #0070C0; padding: 10px; background-color: #E6F2FF;"> <p> <b>Note:</b></p> <p>You can adjust the size of the system table database to match the size of the application.</p> </div>
Oracle Hyperion Financial Management and Calculation Manager	<ul style="list-style-type: none"> <li>• 100 MB for applications with 5,000 or fewer total members</li> <li>• 200 MB for applications with 15,000 or fewer total members</li> </ul>
	<div style="border: 1px solid #0070C0; padding: 10px; background-color: #E6F2FF;"> <p> <b>Note:</b></p> <p>You can adjust the size of the system table database to match the size of the application.</p> </div>
Oracle Hyperion Financial Close Management	See the <i>Oracle Hyperion Financial Close Management Performance Tuning Guide</i> , which can be found on Oracle Support by searching for document ID 1575381.1
Oracle Hyperion Tax Governance	See the <i>Oracle Hyperion Financial Close Management Performance Tuning Guide</i> , which can be found on Oracle Support by searching for document ID 1575381.1



Product	Sizing Guideline
Oracle Hyperion Tax Provision	<ul style="list-style-type: none"> <li>• 100 MB for applications with 5,000 or fewer total members</li> <li>• 200 MB for applications with 15,000 or fewer total members</li> </ul>
Oracle Hyperion Profitability and Cost Management	Oracle recommends starting with at least 250 MB.

 **Note:**

You can adjust the size of the system table database to match the size of the application.

## Oracle Database Configuration Considerations

### Related Topics

- [Tablespace Considerations](#)
- [Other Parameters](#)

## Tablespace Considerations

The following table describes the Oracle Database tablespace considerations.

Product	Tablespace Considerations
General—All products	<ul style="list-style-type: none"> <li>• Consider a global view of tablespaces and allocate one or more tablespaces in order to spread out tables created by Oracle Enterprise Performance Management System products.</li> <li>• Tablespaces can be shared with other applications.</li> <li>• Create a separate tablespace for indexes to improve performance. This action requires CREATE TABLESPACE system privileges.</li> <li>• Ensure that the SEGMENT SPACE MANAGEMENT parameter is set to AUTO when you create tablespace, to improve performance.</li> </ul>
Oracle Hyperion Financial Reporting	Dedicate a tablespace to Financial Reporting. Determine the tablespaces to be used as the default tablespace, and the temporary tablespace for this user. Do not use the SYSTEM tablespace.
Oracle Hyperion Financial Management	Set up a temporary tablespace greater than 1GB.

Product	Tablespace Considerations
Oracle Hyperion Financial Close Management	See the <i>Oracle Hyperion Financial Close Management Performance Tuning Guide</i> , which can be found on Oracle Support by searching for document ID 1575381.1
Oracle Data Relationship Management	<ul style="list-style-type: none"> <li>Set the initial tablespace size to 1 GB</li> <li>Extents to 500 MB</li> <li>Turn Auto Extend ON</li> </ul> See the <i>Oracle Hyperion Data Relationship Management Installation Guide</i>

## Other Parameters

The following table describes other Oracle Database parameters.

Product	Other Parameters
General/AllProducts	Set ALTER SYSTEM SET as follows: ALTER SYSTEM SET processes=1000 SCOPE=SPFILE;
Oracle Hyperion Financial Management	Set Oracle OPEN_CURSORS to 5000.

## Using an Existing Oracle Database Client

For a new installation, if you want to use your existing Oracle Database Client instead of the one installed with EPM System, during EPM System installation clear the selection from Oracle Database Client 32-bit and Oracle Database Client 64-bit under Foundation Services. Then, after installing and configuring Oracle EPM System, perform the following steps:

1. On the machine hosting Foundation Services, update the `TNS_ADMIN` environment variable to point to the location of the existing Oracle Database Client's `tnsnames.ora` file location. If you are using a separate database for Oracle Hyperion Financial Management, make this change on the server hosting the `xfm` process.
2. Move TNS entries from `EPM_ORACLE_INSTANCE/user_projects/config/dbclient/tnsnames.ora` (which is populated during database configuration) to the existing `tnsnames.ora` file. Copy the entire file contents and append to the existing contents of the `tnsnames.ora` file.

## Replacing the EPM System-Installed Oracle Database Client with A Different Oracle Database Client

If you want to use your existing Oracle Database Client instead of the one installed with EPM System, and you already installed the Oracle Database Client during installation of EPM System, then, after installing and configuring Oracle EPM System, perform the following steps.

1. On the machine hosting Foundation Services, update the `TNS_ADMIN` environment variable to point to the location of the existing Oracle Database Client's `tnsnames.ora` file location.

2. Move TNS entries from `EPM_ORACLE_INSTANCE/user_projects/config/dbclient/tnsnames.ora` to the existing `tnsnames.ora` file. Copy the entire file contents and append to the existing contents of your `tnsnames.ora` file.
3. Remove the following EPM System embedded Oracle Database Client BIN paths from the `PATH` environment variable in order to avoid conflicts:

```
<MIDDLEWARE_HOME>\dbclient32\BIN;  
<MIDDLEWARE_HOME>\dbclient64\BIN;
```

## Using a Microsoft SQL Server Database

This section includes information about SQL Server database creation, required roles and privileges, and sizing guidelines.

### Microsoft SQL Server Database Creation Requirements

When creating a Microsoft SQL Server database for use as a repository, ensure that you set these options:

- `ALTER DATABASE DATABASE_NAME COLLATE SQL_Latin1_General_CP1_CI_AS`
- Set `READ_COMMITTED_SNAPSHOT = ON` (not required for Oracle Hyperion Financial Management).
- Set `ALLOW_SNAPSHOT_ISOLATION = ON` (not required for Financial Management).
- Select the SQL Server and Windows authentication option when you set the security properties for the database.

Oracle recommends that you add a prefix to the user name that will correspond to the RCU schema prefix used during configuration.

You must also create a database to be used with the Repository Creation Utility (RCU).

For the RCU database, run these queries:

- `ALTER DATABASE DATABASE_NAME SET READ_COMMITTED_SNAPSHOT ON`
- `ALTER DATABASE DATABASE_NAME COLLATE LATIN1_GENERAL_CS_AS`

### Microsoft SQL Server Roles and Privileges

Database users must be assigned ownership of the database, which provides `DB_OWNER` privileges, and `BULK_INSERT`.

### Microsoft SQL Server Sizing Guidelines

The following table describes the Microsoft SQL Server sizing guidelines.

Product	Sizing Guideline
Oracle Hyperion Shared Services	Start with 100 MB, and add more as the number of migrations with Lifecycle Management and the number of audit records increases.
Oracle Hyperion Enterprise Performance Management Workspace	The space needed depends on the aggregate size of the objects that you plan to store in the repository. Oracle recommends starting with at least 250 MB, which provides space to expand the EPM Workspace repository without having to increase the data file or tablespace. A shared pool size of 60 MB is used during configuration with EPM System Configurator.
Oracle Essbase Administration Services	The space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Oracle Essbase Studio	The space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Oracle Hyperion Planning and Oracle Hyperion Calculation Manager	<ul style="list-style-type: none"> <li>• 100 MB for applications with 5,000 or fewer total members</li> <li>• 200 MB for applications with 15,000 or fewer total members</li> </ul>
Oracle Hyperion Financial Management and Calculation Manager	<ul style="list-style-type: none"> <li>• 100 MB for applications with 5,000 or fewer total members</li> <li>• 200 MB for applications with 15,000 or fewer total members</li> </ul>
Oracle Hyperion Financial Close Management	See the <i>Oracle Hyperion Financial Close Management Performance Tuning Guide</i> , which can be found on Oracle Support by searching for document ID 1575381.1
Oracle Hyperion Tax Governance	See the <i>Oracle Hyperion Financial Close Management Performance Tuning Guide</i> , which can be found on Oracle Support by searching for document ID 1575381.1

 **Note:**

You can adjust the size of the system table database to match the size of the application.

 **Note:**

You can adjust the size of the system table database to match the size of the application.

Product	Sizing Guideline
Oracle Hyperion Tax Provision	<ul style="list-style-type: none"> <li>• 100 MB for applications with 5,000 or fewer total members</li> <li>• 200 MB for applications with 15,000 or fewer total members</li> </ul>
Oracle Hyperion Profitability and Cost Management	Oracle recommends starting with at least 250 MB.
Oracle Data Relationship Management	<ul style="list-style-type: none"> <li>• Set the initial file size to 1 GB</li> <li>• Turn on Auto Growth and set to 10%</li> </ul>

 **Note:**

You can adjust the size of the system table database to match the size of the application.

## Preparing Java Web Application Servers

Many Oracle Enterprise Performance Management System products require a Java web application server. To identify the products that require a Java web application server, see [EPM System Architecture](#).

### WebLogic Server

- Oracle provides a limited-use license of Oracle WebLogic Server for use with Oracle Enterprise Performance Management System products. Typically, EPM System Installer installs WebLogic Server for you.
- However, if you have an existing WebLogic Server installation and want to use it instead of the WebLogic Server installed by EPM System Installer, note the Middleware home location for the WebLogic Server installation. During installation, you must install EPM System products to this same Middleware home. If EPM System Installer detects an existing WebLogic Server installation in the installation location, it does not install WebLogic Server.

If you are using Oracle Hyperion Planning on a WebLogic Server that is configured with 4 GB max heap size, Oracle recommends that you increase the max heap size to 6 GB to reach the same amount of user scalability.

For additional information about using WebLogic Server in a distributed environment, see [Installing EPM System Products in a Distributed Environment](#).

## Preparing Web Servers

### Related Topics

- [Oracle HTTP Server](#)
- [Microsoft Internet Information Services \(IIS\)](#)

## Oracle HTTP Server

You can choose to install Oracle HTTP Server during the installation of Foundation Services, using the Oracle HTTP Server silent installer. You can also configure Oracle HTTP Server to a shared drive location to simplify configuration in a distributed environment.

### ▲ Caution:

Before you install Oracle Enterprise Performance Management System products, ensure you meet the installation prerequisites for Oracle HTTP Server and review the Oracle HTTP Server installation documentation and Release Notes for details. For additional information, see [Web Server Installation Prerequisites](#).

To limit the information the web server presents, make the following changes in `httpd.conf`:

**Table 3-1** `httpd.conf` Entries

<code>httpd.conf</code> Entry	Description
<code>ServerTokens Prod</code>	Configures the web server to not send any version numbers in the HTTP header.
<code>ServerSignature Off</code>	Configures the web server to hide the server version in the footer of server generated pages.
<code>Header always unset "X-Powered-By"</code>	Hides "X-Powered-By" and Server headers sent by downstream application servers.
<code>&lt;IfModule headers_module&gt; Header edit Set-Cookie ^(.*)\$ \$1;HttpOnly;Secure &lt;/IfModule&gt;</code>	Secures the cookie.

## Microsoft Internet Information Services (IIS)

Oracle Data Relationship Management requires that you install IIS with ASP.NET support enabled before installing Data Relationship Management.

Notes about IIS:

- In Windows Server Manager, for **Server Roles** for Web Server (IIS), select **IIS Management Console** under **Management Tools**.

- If .NET is not detected, EPM System Installer downloads the web-based installer required for your version of Windows.
- If IIS is chosen as the web server during configuration, you must allow all unknown ISAPI extensions through the Internet Information Services Manager.

## Verifying the IIS Installation

To verify the IIS installation, ensure that the IIS services are running:

- **IIS Admin Service**
- **World Wide Web Publishing Service**

If you do not see the services for IIS, ensure that IIS is installed.

## Using IIS in a Localized Environment

In a localized environment, the following conditions are required to successfully configure Oracle Enterprise Performance Management System on IIS:

For IIS 8:

- The IIS site name should not be localized; it should be "Default Web Site" in English on any machine, localized or not
- IIS should have an application pool called "DefaultAppPool"
- The "DefaultAppPool" and "Default Web Site" must have ID = 1
- The physical path for the default web site should be: %SystemDrive%\inetpub\wwwroot
- Oracle Data Relationship Management installer creates the required Application Pool, called `drm_pool`.

## Preparing Web Browsers

### Related Topics

- [Browser Settings](#)

## 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 click the **Security** tab.
  2. Select **Trusted Sites**, and then click **Sites**.

3. Add the EPM Workspace URL to the list.
- For Internet Explorer, customize security settings:
    1. In Internet Explorer, select **Tools**, then **Internet Options**, then the **Security** tab.
    2. Select the zone containing Oracle servers and click the **Custom level** button.
    3. In the **Miscellaneous** section, enable **Access data sources across domains** and **Allow script-initiated windows without size or position constraints**.
  - If you are using Internet Explorer with EPM Workspace in Norwegian, you need to change the Language Preferences settings as follows:
    1. In Internet Explorer, select **Tools**, then **Internet Options**, and click the **Languages** button.
    2. In the **Language Preferences** dialog box, select each of the Norwegian settings, and then click **Remove**.
    3. Click **Add**, and then add a user-defined value called **no** and click **OK**.
    4. In the Language field, select the new **User Defined [no]** entry, and then click **Move up** to move this entry to the top of the list.
    5. Click **OK**.

You can now view Oracle Enterprise Performance Management System products in Norwegian using Internet Explorer.

 **Note:**

After you click **OK**, the custom language setting in Language Preferences dialog box changes to **Norwegian (Bokmal) [no]**, which is different from the default **Norwegian (Bokmal) [ne-NO]** setting.

## Support Matrix for High Availability and Load Balancing

The tables in this section list the supported clustering methodologies for Oracle Enterprise Performance Management System components by product group and indicate whether high availability and load balancing are supported for each component. The tables also include notes and references to additional information. Use this table to help plan your environment.

Session failover is not supported for EPM System Java web applications.

Documentation resources:

- If you automatically deployed web applications, for information about clustering using EPM System Configurator, see "Clustering Java Web Applications Using EPM System Configurator" in the *Oracle Enterprise Performance Management System Deployment Options Guide*.
- For Oracle Essbase:
  - Active-passive clustering (Windows): "Configuring Active-Passive Essbase Clusters (Windows)" in the *Oracle Enterprise Performance Management System Deployment Options Guide*



- Active-active clustering: "Configuring Active-Active Essbase Clusters" in the *Oracle Enterprise Performance Management System Deployment Options Guide*
- For Oracle Hyperion Financial Management Server: "Clustering Financial Management Servers" in the *Oracle Enterprise Performance Management System Deployment Options Guide*
- For Oracle Data Relationship Management:
  - "Data Relationship Management Clusters" in the *Oracle Enterprise Performance Management System Deployment Options Guide*
  - "Configuring Load Balancing for Data Relationship Management Web Applications" in the *Oracle Data Relationship Management Installation Guide*
  - "Configuring Host Machines" in the *Oracle Data Relationship Management Installation Guide*

**Table 3-2 Foundation Services Clustering**

Product/ Component	Supported Methodology	High Availability	Load Balancing	Notes
Oracle Hyperion Foundation Services Managed Server (includes Oracle Hyperion Shared Services and Oracle Hyperion Enterprise Performance Management Workspace Java Web applications)	WebLogic clustering with EPM System Configurator	Yes	Yes	To configure Oracle Hyperion Enterprise Performance Management System Lifecycle Management for high availability when Shared Services is set up for high availability, you must set up a shared disk.
Oracle Hyperion Calculation Manager Java Web Application	WebLogic clustering with EPM System Configurator	Yes	Yes	None

**Table 3-3 Essbase Clustering**

Product/Component	Supported Methodology	High Availability	Load Balancing	Notes
Essbase Server	<ul style="list-style-type: none"> <li>Active-passive clustering with Microsoft Clustering Services (Windows)</li> <li>Active-active clustering with Oracle Hyperion Provider Services</li> </ul>	Yes	Active-active clusters configured with Provider Services support load-balancing.	<ul style="list-style-type: none"> <li>Active-passive clusters support failover with write-back.</li> <li>Active-active clusters are read-only.</li> </ul> <p>The following EPM System products support Essbase active-passive failover:</p> <ul style="list-style-type: none"> <li>Oracle Hyperion Financial Data Quality Management, Enterprise Edition</li> <li>Oracle Hyperion Planning</li> <li>Oracle Essbase Administration Services</li> <li>Oracle Essbase Studio</li> </ul>
Administration Services Java Web Application	WebLogic clustering with EPM System Configurator	Yes	Yes	
Provider Services Java Web Application	WebLogic clustering with EPM System Configurator	Yes	Yes	None
Essbase Studio	None	No	No	None

**Table 3-4 Financial Reporting**

Product/Component	Supported Methodology	High Availability	Load Balancing
Oracle Hyperion Financial Reporting Java Web Application	WebLogic clustering with EPM System Configurator	Yes	Yes

**Table 3-5 Financial Performance Management Applications Clustering**

Product/Component	Supported Methodology	High Availability	Load Balancing
Planning Java Web Application	WebLogic clustering with EPM System Configurator	Yes	Yes
Planning RMI Registry	None	No	No
Financial Management Server	Clustering with EPM System Configurator	Yes	Yes

**Table 3-5 (Cont.) Financial Performance Management Applications Clustering**

Product/Component	Supported Methodology	High Availability	Load Balancing
Financial Management Java Web Application	WebLogic clustering with EPM System Configurator	Yes	Yes
Oracle Hyperion Profitability and Cost Management Java Web Application	WebLogic clustering with EPM System Configurator	Yes	Yes
Oracle Hyperion Financial Close Management	WebLogic clustering with EPM System Configurator	Yes	Yes
Oracle Hyperion Tax Governance	WebLogic clustering with EPM System Configurator	Yes	Yes
Oracle Hyperion Tax Provision	WebLogic clustering with EPM System Configurator	Yes	Yes

**Table 3-6 Data Management Products Clustering**

Product/Component	Supported Methodology	High Availability	Load Balancing	Notes
FDMEE	WebLogic clustering with EPM System Configurator	Yes	Yes	None
Data Relationship Management IIS Web Application	Clustering with a web server or third-party load balancer	No	Yes	Multiple Microsoft IIS instances are deployed in an active-active configuration.
Data Relationship Management Application Server	Clustering with Data Relationship Management proprietary load balancing	No	Yes	Multiple application servers are deployed in a primary-secondary configuration.

# 4

## Downloading Files for Installation

### Related Topics

- [Downloading the Installation Files](#)

## Downloading the Installation Files

To download the installation files:

1. Create a directory to store the Oracle Enterprise Performance Management System files.

You can download files to a shared drive, or to each machine in your deployment. If you are installing from a network drive, map this drive. This directory is referred to as `/download_location` in this procedure.

### Tip:

Oracle recommends that you download files to a shared drive.

2. From the [Oracle Software Delivery Cloud \(http://edelivery.oracle.com/\)](http://edelivery.oracle.com/), select the products that you licensed and add them to the cart. All required zip files are included. Select your platform, and download the files into `/download_location`.

For more details, review the “Oracle Enterprise Performance Management System” media pack.

ZIP files include EPM System Installer and installation *assemblies* (product plug-in installation files for EPM System Installer).

3. Unzip the files into `/download_location`.
  - 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.
  - Unzip to a directory with no spaces in the name.

The assemblies are automatically unzipped into an `/assemblies` directory.

If you downloaded files to a central location, ensure that you unzip the following common files. If you downloaded files to multiple machines in your deployment, on each machine in the deployment, unzip the following common files. Unzip files for each operating system in a separate folder.

- EPM System Release 11.2.0.0.0 for `platformName` (Part 1)
- EPM System Release 11.2.0.0.0 for `platformName` (Part 2)
- EPM System Release 11.2.0.0.0 (Part 3)

- EPM System Release 11.2.0.0.0 for *platformName* (Part 4)

Note that files are listed on Oracle Software Delivery Cloud as 11.2.0.0.0 (for example Oracle Enterprise Performance Management System - Part 1 11.2.0.0.0) but the downloaded ZIP files contain Release 11.2.1 files.

Note the following information about preparing files for a distributed environment:

- Even though you need these four ZIP files on each machine in the environment, install Oracle Hyperion Foundation Services Java web applications on only one machine (unless multiple Java web applications are required for clustering).
  - On the machine on which you plan to administer the Oracle WebLogic Server, you must install all Java web applications for all applications you plan to deploy on any machine in the environment. For more information, see [Installing EPM System Products in a Distributed Environment](#).
4. Unzip the installation assemblies into the same directory (*/download\_location*).
  5. The */assemblies* directory should include a subdirectory for each product that you want to install on this machine. Ensure that the */assemblies* directory looks as follows:

```
assemblies/  
    product/  
        version/  
            assembly.dat
```

 **Note:**

*ProductRef.inf* might be in the */assemblies* directory. It can remain without causing problems.

EPM System Installer can install a product only if the installation assembly files for the product are downloaded and unzipped to the correct location.

# 5

## Installing EPM System Products in a New Deployment

EPM System Installer installs web and services components. Additionally, when you configure Oracle Enterprise Performance Management System products, you configure databases.

Clients are installed with standalone installers.

### Note:

- If you are upgrading from Release 11.1.2.4.xxx, see [Upgrading EPM System](#).
- If you are applying an update from Release 11.2.0, see [Applying an Update to EPM System Products](#).


## Installation Checklist for a New Installation

Oracle Enterprise Performance Management System deployment follows this workflow. Each part of the workflow is described in the sections as noted in the table below.

### Note:

If you are upgrading from Release 11.1.2.4.xxx, see [Upgrading EPM System](#).

Task	Reference
1. Meet the system requirements.	<a href="https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html">https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html</a>
2. Plan the installation and perform prerequisite tasks.	<a href="#">Preparing Your Environment</a>
3. Prepare the installation files.	<a href="#">Downloading Files for Installation</a>

Task	Reference
4. Install EPM System products.	<p data-bbox="876 262 1323 325"><a href="#">Installing EPM System Products in a New Deployment</a></p> <p data-bbox="876 325 1356 420">Ensure that you meet any installation prerequisites that apply to your environment. <a href="#">Installation Prerequisites and Requirements.</a></p> <div data-bbox="1079 441 1378 714" style="border: 1px solid green; background-color: #e0f2f1; padding: 10px;"><p data-bbox="1112 483 1218 525"> <b>Tip:</b></p><p data-bbox="1161 535 1347 682">Before you begin, determine the type of installation you plan to perform:</p></div> <ul data-bbox="876 745 1161 850" style="list-style-type: none"><li>• New installation</li><li>• Re-install this release</li><li>• Apply Update</li></ul> <p data-bbox="876 850 1307 903">For details on each installation type, see <a href="#">Installation Type</a>.</p>
5. Create infrastructure schemas using Repository Creation Utility.	<p data-bbox="876 903 1299 976"><a href="#">Creating Infrastructure Schemas Using Repository Creation Utility</a></p>
6. Update RCUSchema.properties.	<p data-bbox="876 976 1250 1020"><a href="#">Updating RCU Schema Properties</a></p>

Task	Reference
7. Configure EPM System products using EPM System Configurator.	<a href="#">Configuring EPM System Products in a New Deployment</a> Ensure that you meet any configuration prerequisites that apply to your environment. See <a href="#">Configuration Prerequisites</a> .

 **Note:**

<https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html>

In a distributed environment, configure Oracle Hyperion Foundation Services first. Foundation Services must be installed and configured in order for other products to configure successfully.

Configure other EPM System products, and then configure the web server last: (Select the Foundation Services **Configure Web Server** task.)


Then, restart the web server and refresh Oracle Hyperion Enterprise Performance Management Workspace. If you configured Oracle HTTP Server to a shared drive, you can simply restart the web server and




---

Task	Reference
------	-----------

---

 refresh EPM Workspace; you do not have to reconfigure the web server. See [Refreshing EPM Workspace](#).

For more information about required configuration sequence, see [Configuration Sequence](#).

 **Note:**

If you are enabling SSL in your deployment, see the *Oracle Enterprise Performance Management System Security Configuration Guide* before you configure. Different SSL configurations have implications for the choices you make during configuration using EPM System Configurator. Also, there are additional post-configuration tasks when deploying an SSL configuration.

8. Any time you deploy additional products, reconfigure the web Server and then restart it (or simply restart it if you configured Oracle HTTP Server to a shared drive) on each machine hosting Foundation Services. Then, refresh EPM Workspace on each Foundation Services host machine in your deployment.

[Refreshing EPM Workspace](#).

Task	Reference
9. Perform any required manual configuration tasks for your products.	<a href="#">Performing Manual Configuration Tasks in a New Deployment</a>
10. Start EPM System services.	<a href="#">Starting and Stopping EPM System Products</a>
11. Validate the installation using Oracle Hyperion Enterprise Performance Management System Diagnostics and verify deployment.	<a href="#">Validating the Installation and Verifying Deployment</a>
12. Enable external authentication and provision users.	<i>Oracle Enterprise Performance Management System Security Configuration Guide</i>

 **Tip:**

During installation, configuration, and validation, keep a list of all user names and passwords that you use to create or modify the system, including the applications with which they are associated and their purpose.

## Installation Prerequisites and Requirements

Note the following installation prerequisites.

- Review the system requirements in the (<http://www.oracle.com/technetwork/middleware/ias/downloads/fusion-certification-100350.html>).
- See [Preparing Your Environment](#) for installation prerequisites.
- Download files required for installation. See [Downloading Files for Installation](#). Review the Media Pack Readme on the [Oracle Software Delivery Cloud](#) to see which products are required or optional for use with your products.
- For Oracle Hyperion Tax Provision, you must also install all Oracle Hyperion Financial Management components, although they do not need to be installed on the same machine as Tax Provision.
- If you plan to deploy Oracle Enterprise Performance Management System products in an SSL-enabled environment, review the *Oracle Enterprise Performance Management System Security Configuration Guide* before you install and configure. The SSL implementation you choose affects the options you choose during configuration. Optionally, you can deploy non SSL and reconfigure to use SSL. See the *Oracle Enterprise Performance Management System Security Configuration Guide*.
- Ensure that there is 1 GB of temp space available. You can specify an alternate `/tmp` directory if needed.
- If you are installing on the same machine on which Oracle Business Intelligence Enterprise Edition or Oracle Business Intelligence Publisher are installed, install into two different Middleware homes. Future patch sets for EPM System and Oracle BI EE will be released at different times, which would create constraints for the upgrades of a merged Fusion Middleware Home.

For information about Fusion Middleware, see <https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html>.

- If you are installing and configuring Oracle Hyperion Financial Data Quality Management, Enterprise Edition, Oracle Data Integrator is automatically installed and configured for you. The database for Oracle Data Integrator is in same database as FDMEE and the Oracle Data Integrator agent application is deployed in same JVM as FDMEE. Optionally, you can install ODI Studio using `ODI_STUDIO-11200.zip`.
- FDMEE is required for Account Reconciliation Manager in Oracle Hyperion Financial Close Management.
- Typically, EPM System Installer installs Oracle WebLogic Server for you. If you have an existing WebLogic Server installation and want to use it instead of the WebLogic Server installed by EPM System Installer, it must be the version supported by EPM System. Note the Middleware home location for the WebLogic Server installation. During installation, you must install EPM System products to this same Middleware home. If EPM System Installer detects an existing WebLogic Server installation in the installation location, it does not install WebLogic Server.

If the existing WebLogic Server version is not the correct version for EPM System, you must either uninstall the current version, install the correct version, or upgrade to the correct version before running EPM System Installer.

## Web Server Installation Prerequisites

Optionally, EPM System Installer installs Oracle HTTP Server during the installation of Oracle Hyperion Foundation Services, using the Oracle HTTP Server silent installer. If you choose not to install Oracle HTTP Server, for example in a development environment, EPM System Installer installs an embedded WebLogic HTTP Server as part of Foundation Services that acts as a proxy server. In a production environment, Oracle recommends that you install Oracle HTTP Server for use with WebLogic.

- For Oracle HTTP Server certification information, go to: [http://www.oracle.com/technology/software/products/ias/files/fusion\\_certification.html](http://www.oracle.com/technology/software/products/ias/files/fusion_certification.html).
- For Oracle HTTP Server installation information, see the Oracle HTTP Server installation documentation: [http://download.oracle.com/docs/cd/E15523\\_01/webtier.htm](http://download.oracle.com/docs/cd/E15523_01/webtier.htm) and Release Notes ([http://download.oracle.com/docs/cd/E15523\\_01/relnotes.htm](http://download.oracle.com/docs/cd/E15523_01/relnotes.htm)).
- For Oracle HTTP Server installation issues and workarounds, see the readme for your platform: [http://download.oracle.com/docs/cd/E15523\\_01/relnotes.htm](http://download.oracle.com/docs/cd/E15523_01/relnotes.htm).

On Windows, ensure that you have a paging file size of at least 512 MB. Do not select the option to automatically manage paging file size.

During installation with EPM System Installer, check the Installation status for information about Oracle HTTP Server installation status. If Oracle HTTP Server installation fails, check the logs for details. The logs report information from the Oracle HTTP Server silent installer. You can find the logs in:

Windows: `/diagnostics/logs/ohs`

You can also review the Oracle HTTP Server product logs.

## Installation Sequence

EPM System Installer enables you to install, configure, and deploy multiple products on a machine at one time. EPM System Installer installs components in the correct order, so you can select as many products as you want to install on a machine at one time.

Note that EPM System Installer installs Oracle WebLogic Server on each machine where you install a web tier or Service tier component, including Oracle Essbase Server. The `.jar` files that are installed as part of WebLogic Server and Oracle common directory are used by EPM System Configurator as well as common services. Note that WebLogic Server does not need to run on the Essbase Server.

OPMN is installed with Oracle Hyperion Foundation Services on all machines where EPM System Configurator is used because OPMN is used to create the EPM Oracle instance structure.

## Installing EPM System Products in a Distributed Environment

You typically install Oracle Enterprise Performance Management System products in a distributed environment. The number of computers you need depends on several factors, including:

- The size of the applications
- The number of users
- The frequency of concurrent use by multiple users
- Any requirements your organization has for high availability
- Your organization's security requirements

See [EPM System Architecture](#) for sample architecture diagrams to help plan your deployment.

EPM System Installer simplifies the task of installing components in a distributed computing environment. You can install, configure, and validate any components you want on any computer. Once you have installed, configured, and validated the components on that machine, you can repeat the process on another machine.

Note the following information about installing and configuring in a distributed environment.

Installation considerations in a distributed environment:

- In a distributed environment, EPM Oracle home must be the same on each machine. For example, if the path for EPM Oracle home is `/Oracle/Middleware` on the first machine you configure, it must be `/Oracle/Middleware` on all the machines in the deployment.
- Oracle Hyperion Foundation Services is required on only one machine in the deployment, unless multiple Java web application instances are required for clustering.
- Optionally, Oracle HTTP Server is installed with Foundation Services.

- On the machine on which you plan to administer the Oracle WebLogic Server, you must install all Java web applications for all applications you plan to deploy on any machine in the environment. (The WebLogic Administration Server is installed and deployed on the Foundation Services machine.)
- On each remote machine in a distributed environment, install the Java web applications you plan to run on that machine and then use EPM System Configurator to deploy the Java web applications automatically, or manually deploy the Java web applications.

Note that EPM System Installer installs WebLogic Server on each machine (for web tier and Service tier components) in a distributed environment.

- If you are using IIS as the web server, install each IIS application so that it is co-located with an IIS Web server.
- If you are installing in multiple environments (for example, Development, Test, and Production), install Foundation Services products in each environment.
- In distributed systems, (where Oracle Essbase is installed on a different server than Oracle Hyperion Profitability and Cost Management), Oracle Hyperion Provider Services must also be installed and configured on the Profitability and Cost Management server.

## Installing EPM System Products

You can install Oracle Enterprise Performance Management System products using the graphical user interface, using the console mode interface, or using a silent mode installation response file.

When you install EPM System products, choose which type of installation to perform:

- New installation. (Also used for upgrades.)
- Re-install this release.
- Apply Update. For information about applying an update, see [Applying an Update to EPM System Products](#).

Note the following about installation:

- On Windows machines, do not use the `Administrator` user to install and configure. Run EPM System Installer and EPM System Configurator as a user with administrator rights. Install, configure and run Oracle Hyperion Enterprise Performance Management System Diagnostics as the same user for all EPM System products.
- You cannot run EPM System Installer at the same time that you are running another instance of an Oracle Universal Installer (such as the installer for Oracle Database).
- Run EPM System Installer from a mapped drive, not from a UNC address.

To install EPM System products:

1. Choose a method:
  - (Windows) Double-click `installTool.cmd` in the root directory to which you extracted the EPM System Installer files.

- (Windows) From a Windows console, change to the root directory to which you extracted the EPM System Installer files and enter `installTool.cmd -console`.
- Create a silent installation response file. See [Performing Silent Installations](#).

You can specify an alternate `tmp` directory by using the `-tmp` parameter. For example: `./installTool.cmd -tmp /templocation`.

EPM System Installer performs some initial checks while launching.

EPM System Installer launches.

 **Tip:**

The first page of EPM System Installer might open hidden behind other windows if you navigate away from the EPM System Installer window or try to reposition the initial window. Press Alt+Tab to switch to the first page of the wizard.

2. Select a language.

Throughout EPM System Installer, if a component is not available for installation in the language you selected, it is shaded in color and marked with an asterisk (\*).

3. Review and complete each page of EPM System Installer, clicking or selecting **Next** to move to the next page.

In console mode, enter the number beside the selection you want.

 **Tip:**

EPM System Installer starts to display the progress indicator after it has prepared the list of assemblies to install. This might take several minutes, depending on how many products you selected. EPM System Installer displays progress incrementally as each assembly's installation is complete.

The following table provides links where you can find more details about each page of EPM System Installer.

**Table 5-1 EPM System Installer Pages**

Page	Reference
Welcome	<a href="#">Welcome</a>
Destination/MiddleWare Home	<a href="#">Destination/Middleware Home</a>
Installation Type	<a href="#">Installation Type</a>
Product Selection	<a href="#">Product Selection</a>
Confirmation	<a href="#">Confirmation</a>

4. When installation is complete, click or select **Configure** to configure the products using EPM System Configurator, or click or select **Finish** to close EPM System Installer.

## Welcome

Review the prerequisites carefully before you continue the installation. When you have confirmed that your system meets the prerequisites to run EPM System Installer, click or select **Next** to continue the installation.

EPM System Installer checks for the following:

- Whether the computer host name resolves to an IP address. If the machine host name resolves to an IP address, EPM System Installer provides a warning. Oracle recommends that you resolve this issue and provide a host name instead of an IP address before proceeding.
- Whether your system has a supported operating system.
- Whether your system meets minimum memory requirements to run the installation.
- Whether your system meets environment variable prerequisites.
- Whether the inventory is writable.
- Whether the user installing has administrator privileges (Windows only).
- Whether there is 1 GB of temp space available.
- Basic pre-installation checks for Oracle WebLogic Server.

A check mark indicates that your system meets EPM System Installer prerequisites. If any of the prerequisite items do not display a check mark, and you choose to continue, the installation might not succeed.

### Tip:

If you are using a `hosts` file to resolve your host name, the host name resolves to the first entry in your `hosts` file. To prevent potential communication problems in a distributed environment, ensure that the first entry in your `hosts` file is the machine's fully qualified domain name so that the fully qualified name is stored in the Oracle Hyperion Shared Services Registry.

## Destination/Middleware Home

Specify the destination for the installation location, or browse to a location and select it, and then click or select **Next**. The default location is `Oracle/Middleware`.

The destination you specify becomes the Middleware home. By default EPM System Installer creates a default EPM Oracle home under the Middleware home. The default location is `Oracle/Middleware/EPMSys11R1`.

See [About Middleware Home](#), [EPM Oracle Home](#), and [EPM Oracle Instance](#).

Do not use any of the following symbol combinations in the directory that you specify for *EPM\_ORACLE\_HOME* during installation:

/t

\t

\b

Note the following information about the Middleware home:

- Ensure that this destination has enough disk space to install all the products that you want to install on this machine.  
See [Disk Space and RAM](#) for disk space requirements.
- You select a Middleware home for each machine in your environment.  
In a distributed environment, EPM Oracle home must be the same on each machine. For example, if the path for EPM Oracle home is `/Oracle/Middleware` on the first machine you configure, it must be `/Oracle/Middleware` on all the machines in the deployment.
- If you are reinstalling Oracle Enterprise Performance Management System products on this machine or adding products to your installation, the existing location for the Middleware home is listed as the default installation destination, and you cannot change it.
- The destination path cannot contain spaces; for example, `c:\Program Files` is not acceptable (unless you use short path notation).
- The first character must be an alphanumeric character.

 **Note:**

If you previously used EPM System Installer, and you saved the installation selections to a file, you can load the selections to prepopulate the installation destination and the products to install. Doing so is useful if you are installing the same products on multiple machines. Click **Load**, browse to the saved selections file, and click **Open**.

## Installation Type

Select an installation type, and then click or select **Next**. If an installation type is not applicable on this machine, the option is unavailable.

You cannot combine installation types in one session. For example, you cannot perform a new installation of one product at the same time you perform a reinstallation of another product.

Choose from the following installation types:

- **New installation**



- Choose this option if you are installing an Oracle Enterprise Performance Management System product for the first time on this computer.
- Choose this option if you want to install additional components that you did not initially install.
- **Re-install this release**  
Choose this option if you already installed this version of this EPM System product and want to reinstall it, for example if you need to repair an existing installation.  
If you are reinstalling EPM System products, you must first stop all EPM System services.
- **Apply Update**  
Choose this option to apply an update to Release 11.2.0. See [Applying an Update to EPM System Products](#).

If you are upgrading from Release 11.1.2.4 to Release 11.2.x, see [Upgrading EPM System](#).

## Product Selection

Select the products and product components to install, and then click or select **Next**.

When **Apply Update** is the installation type, EPM System Installer applies the update to all installed products. You can't apply the update to only some products in your deployment. On the Product Selection page, you can't make any selections or deselections.

The following table describes the options for product selection.

**Table 5-2 Product Selection Options**

Action	Details
Select the products components to install.	You can expand and collapse the entries to select or clear specific options for each product and component.
Uncheck all / Check all	Select <b>Check all</b> to select all the products, or <b>Uncheck all</b> to clear all the products. This option is not available if you are applying an update.
Hide/Show unavailable products.	To see only products for which installation assemblies are available, select <b>Hide Unavailable Product Components</b> . To see all products, select <b>Show Unavailable Product Components</b> .

Generally, you can install any combination of components on any computer. Note the following about product selection:

- Products are available for installation only if the assemblies are downloaded to the correct location and the selected component is supported on the platform on which you are installing. If a product is unavailable on the Product Selection page, ensure that the assemblies are in the correct location.

- Select a product component to see information and status about it in the lower portion of the screen. If Microsoft Internet Information Server (IIS) is required for your installation, and it is not installed, a warning is noted in the lower portion of the screen, and you cannot proceed until you install IIS. If you are installing on an unsupported platform, a warning is displayed.
- The Oracle Hyperion Shared Services and Oracle Hyperion Enterprise Performance Management Workspace Java web applications are installed when you install the Oracle Hyperion Foundation Services Java web applications.
- If you selected **New Installation** and you have already installed this release of a product, the product is unavailable in the Product Selection page.
- In some cases, a component is selected, but is unavailable (you can't clear it), because it is required for another selected component.

## Confirmation

Review the summary of products to be installed. If necessary, click or select **Back** and make corrections. Click or select **Next** to begin the installation.

EPM System Installer warns you if there is insufficient disk space.

The **Install Type** column notes one of the following:

- **Install** if this is a new installation.
- **Re-install** if this is a reinstallation of the same release of this Oracle Enterprise Performance Management System product.

To save your installation selections to perform the same installation on another computer, or to use as the basis for a response file for silent installation, see [Saving Installation Selections](#).

## Saving Installation Selections

If you plan to install this same set of components on another computer, you can save the installation selections in a file. You can then load the selections on another computer during installation to prepopulate EPM System Installer pages for **Destination** and **Product Selection**.

To save the installation selections, click or select **Save**, browse to a location, specify a file name, and click or select **Save**.

This procedure creates an editable file that can be used as the basis for a response file for silent installation. For information about using a response file, see [Loading Saved Selections](#).

## Progress

To cancel the installation, click or select **Cancel**.

EPM System Installer starts to display the progress indicator after it has prepared the list of assemblies to install. This might take several minutes, depending on how many products you selected. EPM System Installer displays progress incrementally as each assembly's installation is complete.

When you click or select **Cancel**, EPM System Installer waits until the current assembly completes installing and then stops. It does not undo installations for

assemblies that were already installed. Use EPM System Uninstaller to remove assemblies that were installed. See the *Oracle Enterprise Performance Management System Deployment Options Guide* for information about uninstalling.

**Note:**

“Creating Oracle Inventory” sets up infrastructure for future service fixes.

## Summary

Review the installation summary, and then click or select **Configure** to launch EPM System Configurator or click or select **Finish** to close EPM System Installer.

EPM System Installer indicates the success or failure of the installation. If any part of the installation failed, EPM System Installer notes which assembly failed to install. Check the log files for more information about the errors. You can find the log files in `/diagnostics/logs/install`. There is a log file for each assembly, named `product-install.log`; for example, `hss-install.log`, and a log file for installation, `installTool-install-DateTime.log`.

## Performing Silent Installations

Silent installations automate the installation process so that you can install Oracle Enterprise Performance Management System products on multiple computers without manually specifying installation settings on each machine.

To enable silent installation, record your installation settings in a response file. You can then run a silent installation from the command line, using the installation options that were saved in the response file.

To record installation settings and run a silent installation:

1. Navigate to the directory that contains EPM System Installer.
2. From a command line, run a command:

Windows:

```
installTool.cmd -record filename
```

where *filename* includes an absolute path or file name for the response file.

The file is saved in XML format, but you do not have to save the file with a `.xml` extension.

EPM System Installer launches.

3. Proceed through EPM System Installer, specifying the options that you want to record.

Installation options are recorded in the response file. You can modify the response file later to change installation options.

You are now ready to run the installation in silent mode.

4. Copy the response file to the machine on which you want to run the installation. You can also copy the file to a network drive that is accessible from the machines on which you want to install.
5. From the command line, enter a command:

Windows:

```
installtool.cmd -silent filename
```

The installation runs in the background.

Silent response files are not compatible between earlier releases of EPM System and Release 11.2. If you created silent response files for use with any earlier release of EPM System products, you must re-create them for use with EPM System Release 11.2.

## Loading Saved Selections

You can also record installation settings from within EPM System Installer.

To record installation settings, during installation, on the Installation Confirmation page, click or select **Save**, browse to a location, specify a file name, and click or select **Save**. The file is saved in the same format as for silent installations.

To play back the installation using the same installation destination and product component selections, start EPM System Installer, and on the Destination page, click or select **Load**, browse to the saved selections file, and click or select **Open**.

## Modifying Response Files

After you create a response file, you can modify it to customize the installation options for certain machines. For example, you might create a master silent file for all products, and then for each machine, change the location of the Middleware home and keep only the product components that you want to install on this machine.

To modify a response file:

1. Open the response file in any text editor. The file is in XML format.
2. Edit the file using the following options.
  - `<HyperionHome>`—Location of the Middleware home.
  - `<SelectedProducts>`—Product components to install to specific tiers. Make changes in `<Product name>`, `<ProductComponent name>`, `<InstallTier>`, and `<Component>`.
  - `<Product name>`—The name of the product. Enclose product names in quotes, as they are XML attributes.
  - `<ProductComponent name>`—The component of the product. Enclose component names in quotes, because they are XML attributes.
  - `<InstallTier>`—The installation tier for the component installation (Client, Service, WebApplication).
  - `<Component>` — The services to install.
3. Save the file in XML format.

# Installing EPM System Clients

## Related Topics

- [Client Installation Prerequisites](#)
- [Downloading and Extracting Client Installers](#)
- [Installing EPM System Clients](#)
- [Installing EPM System Clients from EPM Workspace](#)
- [Installing EPM System Clients From the Command Line](#)
- [Installing and Updating Smart View Extensions](#)

## Client Installation Prerequisites

Review these prerequisites before installing Oracle Enterprise Performance Management System clients:

- Install Microsoft Excel and Oracle Smart View for Office on the same machine, with access to Oracle Hyperion Planning.
- **Smart View:** Smart View must be installed on a machine that already has Microsoft Office 32-bit or Office 64-bit and .NET Framework 4.5 installed. Install Microsoft Excel with the Visual Basic option.

## Downloading and Extracting Client Installers

You use client installers when [Installing EPM System Clients](#) and when [Installing EPM System Clients from EPM Workspace](#).

Make sure you've downloaded files needed for your product. See [Downloading Files for Installation](#).

To extract the Oracle Enterprise Performance Management System client installers:

1. On your local computer, create *client installer folder*; for example, EPM\_Clients\_unzipped.
2. Extract files from ClientInstallers-11200.zip into the folder you created.

Extracting the contents of the downloaded file creates subfolders in *client installer folder* that contain the installer files, as follows:

- EssbaseAdministrationServicesConsole/EASConsole.exe
- EssbaseClient/EssbaseClient.exe
- Planning/PlanningSVEExtension.msi
- CloseMgrSupplementalDataSVEExt.exe
- TaxOpsTaxSupplementalSVEExt.exe

## Installing EPM System Clients

The following Oracle Enterprise Performance Management System clients have their own Windows installers:

- Essbase Oracle Essbase Administration Services Console
- Oracle Essbase Client
- Planning Admin Extension for Oracle Smart View for Office
- Smart View Extension for Close and Supplemental Data Management
- Smart View Extension for Tax Operations and Tax Supplemental Schedules

 **Note:**

Smart View. To ensure that users install the latest version of Smart View, the Smart View installer is available only on Oracle Technology Network.

If you have installed a client in a previous release using a Windows installer, you do not need to uninstall the earlier release of the client.

 **Note:**

If you are using terminal services to install clients, switch your session to installation mode (`change user /install`) before running any EPM System client installer.

To install EPM System clients using the Installer:

1. From *client installer folder*, open the subfolder for the client installer and then double-click the client installer file name.  
See [Downloading and Extracting Client Installers](#) for the subfolders and installer names.
2. Proceed through the installation wizard, and click **Finish** when the installation is complete.

You can also install some clients from Oracle Hyperion Enterprise Performance Management Workspace. See [Installing EPM System Clients from EPM Workspace](#).

## Installing EPM System Clients from EPM Workspace

If you have installed and configured Oracle Hyperion Enterprise Performance Management Workspace, you can download and launch installers for the following clients from EPM Workspace:

- Oracle Smart View for Office. By default, when you install Smart View from EPM Workspace, the **Install** link launches Oracle Technology Network (OTN), where you download and install the latest version of Smart View. This ensures that users have the most recent version of Smart View for installation.
- Oracle Hyperion Financial Reporting Utilities
- Oracle Hyperion Tax Provision Metadata Accelerator
- Planning Admin Extension

To install Oracle Enterprise Performance Management System clients from EPM Workspace:

1. Copy the client installer from *client installer folder* and place it in a folder on the EPM Workspace server.

See [Downloading and Extracting Client Installers](#) for information on *client installer folder*.

See [Table 1](#) for information on where to place client installers in EPM Workspace.

This step is not necessary for Smart View.

**Table 5-3 Where to Place Client Installers in EPM Workspace**

EPM System Client	Client Installer	Location in EPM Workspace
Smart View		N/A. Downloadable from Oracle Technology Network.
Financial Reporting Utilities	FinancialReportingStudio/ FinancialReportingUtils.zip	
Tax Provision Metadata Accelerator	HTPAcceleratorInstaller.svext	<i>EPM_ORACLE_HOME</i> /common/ epmstatic/wspace/taxprov/ HTPAcceleratorInstaller.svext
Planning Admin Extension	Planning/ PlanningSVEExtensions.msi	<i>EPM_ORACLE_HOME</i> /common/ epmstatic/wspace/ PlanningSmartviewExtension/ PlanningSVEExtension.msi

2. Launch EPM Workspace and log in:

`http://epm.mycompany.com:19000/workspace/index.jsp`

3. Select **Tools**, then **Install**, and then select the product to install. Follow the onscreen prompts.

For Smart View, unless you changed the location for installation, the Oracle Technology Network page for Smart View launches:

- a. From Oracle Technology Network, select **Oracle Smart View for Office**, click **Download latest Version**, accept the license agreement, click **Download Now**, and then click **Save** to save the file locally.
- b. Unzip the file, launch **SmartView.exe**, and then follow the onscreen prompts.

## Installing EPM System Clients From the Command Line

You can run an Oracle Enterprise Performance Management System client installer from the command line using the following parameters:

**Table 5-4 Command Line Options for Client Installations**

Option	Usage
<code>/v" command line options"</code>	Specifies command line options to be passed to the client installer.
<code>/s</code>	Runs the client installer as a silent installer.

**Table 5-4 (Cont.) Command Line Options for Client Installations**

Option	Usage
/qn	Makes the installation non-interactive.
INSTALLDIR=	Specifies the installation directory.
<i>l*v log file path and name</i>	Logs installation information in the specified file.

 **Note:**

If the EPM\_ORACLE\_HOME environment variable is defined, the client installation ignores the INSTALLDIR= value and install the clients in EPM\_ORACLE\_HOME:

## Performing Silent Client Installations

Administrators can enable silent installations. When silent installations are enabled, you can include the silent installation command in scripts to automate the process, so that you do not need to specify settings each time you perform an installation.

To perform a silent installation of any Oracle Enterprise Performance Management System client, use this command:

```
installer file name /s /v" /qn INSTALLDIR=installation directory /l*v log file path and name"
```

 **Note:**

For installer file names, see [Downloading and Extracting Client Installers](#).

## Installing and Updating Smart View Extensions

Oracle Smart View for Office supports provider extensions for the following Oracle Enterprise Performance Management System products:

- Oracle Hyperion Financial Reporting
- The Planning Admin extension for Oracle Hyperion Planning
- Smart View Extension for Close and Supplemental Data Management



- Smart View Extension for Tax Operations and Tax Supplemental Schedules
- Tax Provision Metadata Accelerator Smart View Extension

If you are an administrator, see "Administering Extension Installations and Updates" in the *Oracle Smart View for Office Installation and Configuration Guide* for information about administering extension installations and updates.

# 6

## Configuring EPM System Products in a New Deployment

### Related Topics

- [About EPM System Configurator](#)
- [Configuration Prerequisites](#)
- [Configuration Sequence](#)
- [Configuring Products in a Distributed Environment](#)
- [Configuring Products in an SSL-Enabled Environment](#)
- [Product Configuration Task Summary](#)
- [Configuring EPM System Products](#)
- [EPM System Configurator Task Reference](#)
- [Performing Silent Configurations](#)
- [What Happens During Configuration](#)
- [Troubleshooting Configuration](#)
- [Manually Configuring Oracle HTTP Server](#)

### About EPM System Configurator

EPM System Configurator is installed with the first Oracle Enterprise Performance Management System product installed on a computer and is used to configure all products installed on the computer. Use EPM System Configurator on each computer on which EPM System products are installed. (EPM System clients do not require configuration.)

Use the configuration worksheets throughout this chapter to plan your configuration and to document the configuration steps for your company if required for disaster recovery.

### Configuration Prerequisites

Configuration prerequisite notes:

- Ensure that host names resolve properly for each machine in the deployment. See [Ensuring that Host Names Resolve](#).
- Use the Repository Creation Utility (RCU) to create schemas to support Oracle Enterprise Performance Management System Java web applications, and then modify RCU schema properties. See [Creating Infrastructure Schemas Using Repository Creation Utility](#) and [Updating RCU Schema Properties](#). You must run RCU and modify RCU schema properties on each machine in your environment.

- When you are deploying on a machine other than the machine hosting Oracle Hyperion Foundation Services, ensure that Oracle WebLogic Server Administration Server is running on the Foundation Services host machine (*FNDHOST1*): On the Foundation Services host machine, start WebLogic Server Administration Server by selecting **Start**, then **All Programs**, then **Oracle WebLogic**, then **User Projects**, then **EPMSysSystem**, and then **Start Admin Server for WebLogic Server**.)
- If you want to deploy Java web applications to a single managed server, you must be using WebLogic Server and have a 64-bit operating system.
- For database configuration tasks, ensure that the database is running.
- If you plan to deploy EPM System products in an SSL-enabled environment, the SSL implementation that you choose affects the options that you select during configuration. Optionally, you can deploy non SSL and reconfigure to use SSL. See the *Oracle Enterprise Performance Management System Security Configuration Guide*.

## Ensuring that Host Names Resolve

Before configuring, ensure that the host name resolves properly for each machine in the deployment. Oracle Enterprise Performance Management System uses Java's canonical host name resolution for resolving host names. To validate host names as resolved by Java, EPM System provides a utility (*epmsys\_hostname.bat*).

To ensure that host names resolve:

1. Set the *JAVA\_HOME* variable. From a command prompt, enter `set JAVA_HOME=pathToJAVA`. For example, for the default location that EPM System Installer uses for Java, enter the following command: `set JAVA_HOME=c:\oracle\middleware\jdk1.8.0_181`.
2. Unzip *epmsys\_hostname.zip*, in *EPM\_ORACLE\_HOME/common/config/11.1.2.0*.
3. From a command prompt, change to the directory to which you unzipped the utility, and then enter the following command:

```
epmsys_hostname.bat hostName
```

4. Review the results in the command line.

For example:

```
InetAddress details of host hostNameAddress is xx.xxx.xxx.xxxName is  
hostNameCanonical Name is hostName.mycompany.com
```

5. If you see the error "Unable to determine the host details", to resolve the host name, create a local hosts file and add an entry for this server.

## Creating Infrastructure Schemas Using Repository Creation Utility

The Repository Creation Utility (RCU) is used to create schemas to support Oracle Enterprise Performance Management System Java web applications. This process requires sys DBA credentials.

You must run RCU on each machine in your environment. In a distributed environment, create a new, different prefix for each machine in the environment.

Make sure you've set up database schemas for your database. See [Preparing a Database](#).

If you are using SQL Server, you must create an additional database for use with RCU. See [Using a Microsoft SQL Server Database](#).

To create schemas using the Repository Creation Utility:

1. Navigate to `Middleware home/oracle_common/bin/`.
2. Launch `rcu.bat`.
3. On the **Welcome** page, click **Next**.
4. Click **Create Repository** and **System Load and Product Load**, and then click **Next**.

If you have previously created a repository and configured EPM System, and you want to perform a fresh configuration, drop the repository, and then create a new repository.

5. 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**.
6. On the **Select Components** page, perform these tasks, and then click **Next**:
  - Select **Create new prefix** and provide a prefix. Oracle recommends that you use the same prefix for the EPM System database user and for the RCU database.

 **Note:**

In a distributed environment, create a new, different prefix for each machine in the environment.

- Expand **AS Common Schemas** and select all the options.
  - Clear the selection for **Oracle Data Integrator**.
  - Make a note of the **Schema Owner** names for all the components because you need them to configure Oracle Web Services Manager.
7. On the **Schema Passwords** page, Oracle recommends that you select **Use same passwords for all schemas**. Enter a password, make a note of it, and then click **Next**.
  8. On the **Map Tablespaces** page, click **Next**, and then click **OK** to create tablespaces.
  9. On the **Summary** page, review the selections, and then click **Create**.
  10. On the **Completion Summary** page, click **Close**.

For additional information on the Repository Creation Utility, see the *Oracle® Fusion Middleware Repository Creation Utility User's Guide 11g Release 1 (11.1.1)*.

## Updating RCU Schema Properties

Update RCU schema properties on each machine in your environment.

1. Navigate to `EPM_ORACLE_HOME/common/config/11.1.2.0/RCUSchema.properties`.
2. Provide the required database details. If you are using Microsoft SQL Server, provide the database details for the RCU database you created.

These properties are used during configuration.

- `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. (Make sure it is the same as the Oracle Hyperion Shared Services Registry database user)

 **Note:**

In a distributed environment, for each machine, specify the prefix you created for that machine.

- `dbURL`—For example: `dbURL=jdbc:oracle:thin:@hostname:port:sid`

The passwords are encrypted.

Enter these properties once before configuring. You don't need to make subsequent updates if you reconfigure or redeploy.

Notes for `dbURL`:

- Format for Oracle Database with SID:  
`dbURL=jdbc:oracle:thin:@hostName:port:SID`
- Format for Oracle Database with service name:  
`dbURL=jdbc:oracle:thin:@hostName:port/serviceName`
- Format for Microsoft SQL Server, with SID, using the name for database you already created:  
`dbURL=jdbc:weblogic:sqlserver://  
hostName:port;databaseName=databaseName`

## Configuration Sequence

Oracle Hyperion Foundation Services must be installed and configured for other products to configure successfully. In general, for a new deployment, Oracle recommends that for each machine, you configure all Oracle Enterprise Performance Management System products at the same time for the products installed on the machine. By default, EPM System Configurator preselects all products for you.

Configuration sequence notes:

- Configure Foundation Services first. Foundation Services must be installed and configured for other products to configure successfully. Then, for each machine in the deployment, configure all EPM System products at one time for the products installed on the machine.

- Configure the web server last. (Select the Foundation Services **Configure Web Server** task.) Then, restart the web server and refresh Oracle Hyperion Enterprise Performance Management Workspace. If you configured Oracle HTTP Server to a shared drive, you can simply restart the web server and refresh EPM Workspace; you do not have to reconfigure the web server. See [Refreshing EPM Workspace](#).
- Complete the configuration on each machine and close EPM System Configurator before launching EPM System Configurator on another machine.
- When you configure in a distributed environment, you configure the Oracle Hyperion Shared Services database on every machine. On the first machine, you are setting up the Oracle Hyperion Shared Services Registry. For configurations on subsequent machines, choose **Connect to a previously configured Shared Services database**, which lets the machine know the location of the Shared Services Registry.
- If you deploy any additional products, reconfigure the web server and then restart it (or simply restart it if you configured Oracle HTTP Server to a shared drive) on each machine hosting Foundation Services.

Then, refresh EPM Workspace on each Foundation Services host machine in your deployment.

See [Refreshing EPM Workspace](#).

- You must perform the **Configure Database** task at the same time as or before you perform the **Deploy to Application Server** task.
- Automatic web server configuration with EPM System Configurator is supported only for the web server installed by EPM System Installer (Oracle HTTP Server or the proxy web Server) or IIS.
- After you have completed configuration, perform any required manual configuration tasks required for your product.

For information about clustering or scaling EPM System, see the *Oracle Enterprise Performance Management System Deployment Options Guide*.

Configure Oracle Data Relationship Management after you have completed all the configuration tasks using EPM System Configurator: See the *Oracle Data Relationship Management Installation Guide*.

## Configuring Products in a Distributed Environment

Ensure that you meet installation and configuration requirements in a distributed environment. See [Installing EPM System Products in a Distributed Environment](#). For information about clustering and high availability, see the *Oracle Enterprise Performance Management System Deployment Options Guide*.

Before you configure, ensure that you have run RCU and updated RCU schema properties on each machine in your environment.

Configuration considerations in a distributed environment:

- You must configure Oracle Hyperion Foundation Services first. Foundation Services must be installed and configured for other products to configure successfully. Configure the web server last.
- Create a new EPM Oracle instance on each machine.

- If you are deploying Java web applications on a machine other than the WebLogic Administration Server machine, WebLogic Administration Server must be running.
- Deploy all Oracle Enterprise Performance Management System products to a single WebLogic domain.
- During configuration with EPM System Configurator, the web server machine needs connectivity to the machine hosting the Oracle Hyperion Shared Services Registry.
- If you are using more than one web server in a deployment for load balancing and failover, configure the web server on every machine on which you want to run the web server. If you have more than one web server, you must use a load balancer (hardware or software) to route traffic to the servers, and the logical web address for the Java web application cluster should be the load balancer. If you have only one web server, the logical web address for the Java web application cluster can be the web server.
- When configuring EPM System for high availability where multiple instances of services are running, and for using Oracle Hyperion Enterprise Performance Management System Lifecycle Management in a distributed environment, in EPM System Configurator, on the **Configure Common Settings** page, for **LCM Export Import Location**, specify a shared file system path defined using UNC syntax that is accessible from all the servers in the deployment. This enables data migration across distributed environments.

If you are using Oracle Hyperion Financial Management in a distributed environment, configure the LCM Export Import folder with Read/Write access for all the Financial Management Application Servers in the environment.

- Optionally, you can configure Oracle HTTP Server to a shared drive to simplify the configuration process.
- For Oracle Hyperion Financial Reporting linked reports to work, configure Financial Reporting so that the logical address of the Financial Reporting component is same as web server port (for example, 19000).

## Configuring Products in an SSL-Enabled Environment

If you are configuring Oracle Enterprise Performance Management System products for SSL, the configuration sequence and selections that you make during configuration depend on the type of SSL implementation you choose. Optionally, you can deploy non SSL and reconfigure to use SSL. See the *Oracle Enterprise Performance Management System Security Configuration Guide*.

### Note:

Oracle Essbase supports only one-way SSL using self-signed certificates by default. Using default certificates is recommended for use only in a test environment. Oracle recommends that you use certificates from well-known third party CAs in a production environment. See the *Oracle Enterprise Performance Management System Security Configuration Guide* for details.

## Product Configuration Task Summary

Configuration notes:

- EPM System Configurator performs pre-configuration tasks and registers products with Oracle Hyperion Shared Services during configuration. You need not select these tasks; they are automatically performed when needed.
- Oracle Hyperion Shared Services Registry database configuration appears once on each machine that you configure.
- Clients do not require configuration and are not included in these tables.

The following table summarizes the configuration options available for Oracle Hyperion Foundation Services products.

**Table 6-1 Foundation Services Configuration Task Summary**

Component	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks
Foundation Services	X	X This selection deploys Shared Services and the Oracle Hyperion Enterprise Performance Management Workspace Java web applications.	<ul style="list-style-type: none"> <li>• Configure Common Settings</li> <li>• Configure Web Server</li> <li>• Configure Logical Address for Web Applications (Optional)</li> <li>• Scale out single managed server on this machine</li> </ul>
Oracle Hyperion Calculation Manager	X	X	N/A

The following table summarizes the configuration options available for Oracle Essbase products.

**Table 6-2 Essbase Configuration Task Summary**

Component	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks
Oracle Hyperion Provider Services	N/A	X	N/A
Oracle Essbase Studio	X (Required for Essbase Studio catalog)	N/A	N/A
Oracle Essbase Administration Services	X	X	N/A
Essbase	N/A	N/A	Configure Essbase Server

The following table summarizes the configuration options available for Oracle Hyperion Financial Reporting.



**Table 6-3 Financial Reporting Configuration Task Summary**

Component	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks
Financial Reporting	X	X	Configure Financial Reporting RMI Ports

The following table summarizes the configuration options available for Financial Performance Management Applications products.

**Table 6-4 Financial Performance Management Applications Product Configuration Task Summary**

Component	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks
Oracle Hyperion Financial Close Management	X	X	
Tax Management	X	X	N/A
Oracle Hyperion Financial Management	X	X	<ul style="list-style-type: none"> <li>Configure Application Server</li> <li>Configure Application Cluster</li> </ul>
Oracle Hyperion Planning	X	X	Configure RMI Server
Oracle Hyperion Profitability and Cost Management	X	X	N/A

The following table summarizes the configuration options available for Data Management products.

**Table 6-5 Data Management Product Configuration Task Summary**

Component	Configure Database	Deploy to Application Server	Product-specific Configuration Tasks
Oracle Hyperion Financial Data Quality Management, Enterprise Edition	X	X	N/A

## Configuring EPM System Products

Run EPM System Configurator on each machine hosting the products to configure or reconfigure. Before configuring, ensure that you've run RCU to create infrastructure schemas. See [Creating Infrastructure Schemas Using Repository Creation Utility](#).

For a list of characters supported during configuration with EPM System Configurator, see [Characters Supported for Installation and Configuration](#).

 **Note:**

On Windows machines, do not use the `Administrator` user to install and configure. Run EPM System Installer and EPM System Configurator as a user with administrator rights. Install, configure and run Oracle Hyperion Enterprise Performance Management System Diagnostics as the same user for all Oracle Enterprise Performance Management System products.

To configure EPM System products:

1. Choose a method to launch EPM System Configurator:
  - On the last page of EPM System Installer, click or select **Configure**.
  - From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
  - Change to `EPM_ORACLE_HOME/common/config/version_number` and then launch `configtool.bat`.
  - To run EPM System Configurator in console mode, launch it from the command line using the `-console` parameter. For example `/common/config/version_number/startconfigtool.bat -console`.
  - For silent configurations, see [Performing Silent Configurations](#).

 **Tip:**

If you launch EPM System Configurator from `EPM_ORACLE_INSTANCE`, EPM System Configurator configures the existing EPM Oracle instance and does not display the "Configure Oracle Instance" page.

EPM System Configurator performs initial checks, checking for the following:

- Environment variables are set
  - `.oracle.products` is present
  - All required `.jars` are present
  - Windows `system32` is in the `PATH`
  - There is a valid EPM Oracle home
  - When Oracle Essbase is installed, that OPMN is also installed on the machine
2. Review and complete each page of EPM System Configurator, clicking or selecting **Next** to move to the next page.

In console mode, enter the number beside the selection you want.

The following table provides links where you can find more details about each page of EPM System Configurator.

Page	Reference
EPM Oracle Instance	<a href="#">Configure EPM Oracle Instance</a>
Task selection	<a href="#">Task Selection</a>
Set Up Oracle Hyperion Shared Services and Registry Database Connection	Ensure that the database is started and that you have created a database. If you have not already created the database, see <a href="#">Preparing a Database</a> . Enter the information as described in <a href="#">Set Up Shared Services and Registry Database Connection</a> .
Configure database	Ensure that the database is started and that you have created a database. If you have not already created the database, see <a href="#">Preparing a Database</a> . Enter the information as described in <a href="#">Configure Database</a> .
Application server deployment	Enter the information as described in <a href="#">Deploy to Application Server: Oracle WebLogic</a> .
Product-specific configuration tasks	For detailed procedures to configure each product, see the sections: <ul style="list-style-type: none"> <li>• <a href="#">Foundation Configuration Tasks</a></li> <li>• <a href="#">Essbase Configuration Tasks</a></li> <li>• <a href="#">Financial Reporting Configuration Tasks</a></li> <li>• <a href="#">Planning Configuration Tasks</a></li> <li>• <a href="#">Financial Management Configuration Tasks</a></li> <li>• <a href="#">Financial Close Management Configuration Tasks</a></li> </ul>

3. (Optional) To save the configuration selections in a response file for silent configuration, click or select **Save**, browse to a location, specify a file name, and click or select **Save**.

This procedure creates an editable file that can be used as a response file for silent configuration. See [Performing Silent Configurations](#).

4. Confirm the configuration tasks to complete, and then click or select **Next**.

EPM System Configurator displays the status of the configuration process.

Configuration time depends on the products and tasks that you selected. Progress is recorded in `/diagnostics/logs/config/configtool.log`.

When configuration finishes, the status of each task is displayed. Configuration results are noted in `/diagnostics/logs/config/configtool_summary.log`.

5. Click or select **Task Panel** to return to the Task Selection page to complete additional configuration tasks.
6. Configure the web server last.
7. Click or select **Finish**.

If configuration is successful, perform any required manual configuration tasks, start services, and validate service startup.

See [Performing Manual Configuration Tasks in a New Deployment, Starting and Stopping EPM System Products](#) and [Validating the Installation and Verifying Deployment](#).

Terminating configuration for a particular product does not terminate the entire process. Configuration continues for the other products. EPM System Configurator displays error messages on a summary page after the configuration process completes.

If errors are displayed, perform these tasks:

- Review the log files.
- See the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide* for information about resolving configuration issues.
- If you see errors related to the Oracle HTTP Server installation, ensure that you have met the Oracle HTTP Server installation prerequisites. See [Web Server Installation Prerequisites](#).

8. Refresh Oracle Hyperion Enterprise Performance Management Workspace.

## Refreshing EPM Workspace

If you deploy any additional products, reconfigure the web server and then restart it (or simply restart it if you configured Oracle HTTP Server to a shared drive) on each machine hosting Oracle Hyperion Foundation Services.

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

You should get a success message.

4. Repeat these steps on each Foundation Services host machine in your deployment.

## EPM System Configurator Task Reference

### Related Topics

- [Configure EPM Oracle Instance](#)
- [Task Selection](#)
- [Set Up Shared Services and Registry Database Connection](#)
- [Deploy to Application Server — Specify WebLogic Domain Information](#)

- [Deploy to Application Server: Oracle WebLogic](#)
- [Configure Database](#)
- [Foundation Configuration Tasks](#)
- [Essbase Configuration Tasks](#)
- [Financial Reporting Configuration Tasks](#)
- [Planning Configuration Tasks](#)
- [Financial Management Configuration Tasks](#)
- [Financial Close Management Configuration Tasks](#)
- [Configuration Summary](#)

## Configure EPM Oracle Instance

Specify a new or an existing EPM Oracle instance for the deployment.

EPM System Configurator deploys dynamic components of Oracle Enterprise Performance Management System products (components that can change during runtime) in the EPM Oracle instance directory. The default EPM Oracle instance location is `MIDDLEWARE_HOME/user_projects/epmsystem1`.

Typically, if you are installing all products on a single machine, for the first product you configure, create a new EPM Oracle instance. For each product after that, modify the existing EPM Oracle instance.

If you are installing in a distributed environment, create a new EPM Oracle instance on each machine.

You can scale up or scale out by installing and configuring additional instances. See the *Oracle Enterprise Performance Management System Deployment Options Guide*.

The following table describes options for EPM Oracle Instance configuration.

EPM System Configurator	Description	Your Information
Home directory for EPM Oracle instances	Specify the directory in which to create the EPM Oracle instance. The default EPM Oracle instance location is <code>MIDDLEWARE_HOME/user_projects</code> . To modify an existing EPM Oracle instance, browse to the EPM Oracle instance location.	
EPM Oracle Instance name	Specify a name for the EPM Oracle instance. The default EPM Oracle instance name is <code>epmsystem1</code> . To modify an existing EPM Oracle instance, specify the EPM Oracle instance name.	

## Task Selection

Select the products and tasks to configure for this machine, or click or select **Next** to select all the required tasks.

Task selection notes:

- In a new installation, all required tasks are selected by default.
- You can clear tasks that you want to perform later.
- Select **Check All** or **Uncheck All** to select or clear all tasks.
- You cannot clear mandatory tasks, which are selected by default. If the task is unavailable (grey) and selected (checked), the task is performed and you cannot clear it.
- EPM System Configurator automatically performs common tasks the first time you configure any component of a product, such as registering the component with Oracle Hyperion Shared Services. EPM System Configurator uses the Oracle Hyperion Shared Services Registry to locate Shared Services.
- The Oracle Hyperion Enterprise Performance Management Workspace Java web application and the Shared Services Java web application are deployed when you select the Hyperion Foundation **Deploy to Application Server** task.

## Set Up Shared Services and Registry Database Connection

Specify the settings for the Oracle Hyperion Shared Services and Registry database.

When you initially configure Oracle Enterprise Performance Management System products, you configure a database for use by Oracle Hyperion Foundation Services, which includes the Oracle Hyperion Shared Services Registry.

When you configure the Shared Services and Registry database, EPM System Configurator ensures that the database is connected and is a supported database type. If a database is detected, you might be prompted to choose whether to use the detected database or create a database.

If you are configuring an Oracle database, EPM System Configurator checks that the database was created with the correct character set. If not, you are prompted to correct it.

For a list of supported databases, see the Certification Matrix (<https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html>).

For database prerequisites for this release, see [Preparing a Database](#).

You can use Windows Authentication for SQL Server connections if you use Microsoft SQL Server database. See [Setting Up Microsoft SQL Server Windows Authentication](#).

For more information about the Shared Services Registry, see [About the Shared Services Registry](#).

### Note:

This task assumes that you have created the database. If you have not created a database, see [Preparing a Database](#).

If you uninstall EPM System products and then reinstall into the same location, you cannot reuse the Shared Services and Registry database.

The following table describes options for Shared Services and Registry Database configuration.

EPM System Configurator Fields	Description	Your Information
Connect to a previously configured Shared Services database/Perform first-time configuration of Shared Services database	<p>When you first configure the Shared Services and Registry database, choose <b>Perform first-time configuration of Shared Services database</b>. This database includes the Shared Services Registry, which is used to store common information for all products.</p> <p>When you configure in a distributed environment, you must configure the Shared Services database on every machine. On the first machine, you are setting up the Shared Services Registry. For configurations on subsequent machines, choose <b>Connect to a previously configured Shared Services database</b>. In this case, you are letting the machine know the location of the Shared Services Registry.</p> <p>For some products, you can use this same database to store product information. In this case, each product has its own table in this database.</p>	
Database Type	Select the database type.	
Server	<p>Specify the name of the database server where the Shared Services database should be created.</p> <p>For Oracle RAC, specify the VIP name or one of the node names as the server name.</p>	
Port	Select the default or specify a custom Shared Services server port number on which the database listens.	
Service Name or SID, or Database Name	<p>Specify the name of the Shared Services database.</p> <p>If you are using an Oracle RAC database, specify the RAC service name.</p>	
User Name	Enter the name of the database user.	
Password	Enter the password of the database user.	

EPM System Configurator Fields	Description	Your Information
Advanced options (Optional)	<p>Click or select to specify additional information.</p> <p>For more information on these options, see <a href="#">Advanced Options for Database Configuration (Optional)</a>.</p> <p>You can use this option to configure Oracle RAC or an LDAP-based JDBC URL.</p>	

## Deploy to Application Server — Specify WebLogic Domain Information

Specify information about the WebLogic domain to which to deploy the Java web applications.

Deploy all Oracle Enterprise Performance Management System products to one domain.




**Note:**

The following table describes options to define the Oracle WebLogic Server domain.

EPM System Configurator Fields	Description	Your Information
Deploy web applications to an existing domain/Deploy web applications to a new domain. The Administration Server for this domain will be created on this machine.	<p>Specify whether to deploy Java web applications to an existing domain or to a new domain.</p> <p>If you create a new domain, the WebLogic Administration Server for this domain is created on this machine.</p>	
Domain Name	<p>To define a new domain, enter a domain name. The default domain name is EPMSystem.</p> <p>To deploy to an existing domain, specify the domain to use for deployment.</p>	
Administration Server Host	For an existing domain, specify the Administration Server Host.	
Administration Server Port	Accept the default port; or, to change the default, enter a port number that does not conflict with other applications installed on your machine.	
Administrator User	Enter the Administrator user name for the domain. By default, EPM System Configurator uses <code>epm_admin</code> .	



EPM System Configurator Fields	Description	Your Information
Administrator Password	Enter the Administrator password or enter a new password for a new domain.	
Confirm Administrator Password	If you are defining a new domain, confirm the Administrator password.	

 **Tip:**  
Make a note of this password.

## Deploy to Application Server: Oracle WebLogic

Specify the application server options, or click or select **Next** to accept the default entries.

Deploy all Oracle Enterprise Performance Management System products to one domain.

The following table describes options for WebLogic application server deployment configuration.

EPM System Configurator Fields	Description	Your Information
Deploy the web applications to a single managed server	<p>Select this option for a deployment to a single managed server.</p> <p>If you select this option, all selected Java web applications are deployed to a single managed server in WebLogic.</p> <p>This option is available only when you are creating a new domain or extending an existing domain created in EPM System Configurator on the machine hosting WebLogic Administration Server.</p> <p>To add products to a single managed server on a machine other than the machine hosting Oracle Hyperion Foundation Services, select <b>Scale out single managed server on this machine</b>.</p> <p>Deploying Java web applications to a single managed server reduces memory requirements and reduces startup time. You can have only one single managed server in an EPM System deployment. You can scale out the single managed server.</p> <p>When you select this option, all managed server names are changed to <code>EPMServer0</code>, and all ports are changed to 9000 or 9443 (SSL). If you change a port, it is reflected in all the rows.</p> <p>If you deselect this option after it is selected, the port values revert to the default individual ports; and if already configured to a different port, the values revert to the user-provided ports.</p>	
Ear/War	Select the components to deploy.	
Managed Server Name	Displays the WebLogic Managed Server name.	
Port	<p>Accept the default port; or, to change the default, enter a port number that does not conflict with other applications installed on your machine.</p> <p>See <a href="#">Ports</a>.</p>	

EPM System Configurator Fields	Description	Your Information
SSL Port	<p>Accept the default port or specify the SSL port to use for deployment. Specifying this port sets up SSL using the Java application server's default certificates. See the <i>Oracle Enterprise Performance Management System Security Configuration Guide</i> for recommendations on updating the Java application server with a valid certificate.</p> <p>If you are using SSL, you must disable the non-SSL port (or redirect it to the SSL port) in your Java application server after configuration to ensure secure communication.</p>	
Status	Indicates the deployment status	

Deployment notes:

- To specify the logical address the products use to connect to the Java web application server, use the "Update Logical Address for Web Applications" task. Select this task when the Java web applications do not communicate with the Java web application server directly, as in the following scenarios:
  - You have set up a cluster with a load balancer.
  - You are using an SSL offloader.

See [Configure Logical Address for Web Applications](#).
- The Oracle Hyperion Enterprise Performance Management Workspace Java web application and the Oracle Hyperion Shared Services Java web application are deployed when you select the Hyperion Foundation **Deploy to Application Server** task.
- If you are implementing a custom authentication module, you must include its Java archive (.jar) in the EPM Product classpath. See the *Oracle Enterprise Performance Management System Security Configuration Guide* for detailed procedures to implement a custom authentication module.

## What Happens During Deployment: WebLogic Server

Deployment notes:

- EPM System Configurator deploys each application to the Oracle WebLogic Server domain you specified. For a new domain, the domain is created when the first application is deployed. Each application runs in a separate JVM, except for Oracle Hyperion Shared Services and Oracle Hyperion Enterprise Performance Management Workspace, which run together and are deployed to the same managed server, or if you deploy multiple Java web applications to a single managed server.
- EPM System Configurator deploys the applications to `MIDDLEWARE_HOME/user_projects/domains/domainName`.

- EPM System Configurator deploys Oracle Enterprise Manager automatically when it deploys the first Java web application.
- Start and stop scripts are created in `/bin/`.
- For each application, in `/bin/deploymentScripts` there is a `setCustomParamsProduct.bat` file, where you can change `JAVA_OPTIONS` when using start scripts.
- EPM System Configurator creates a cluster for each managed server.

## Configure Database

Specify the database settings to use for the products that you selected on the Task Selection page. You can specify database connection information for each product separately, or use the same settings for multiple selected products.

For ease of deployment and simplicity, for a new installation, you can use one database for all products. In some cases, you might want to configure separate databases for products. Consider performance, roll-back procedures for a single application or product, and disaster recovery plans.

Database configuration notes:

- Ensure that the database is set up.  
If you have not already created the database, see [Preparing a Database](#).
- A database type might not be available if one of the selected products doesn't support it. In this case, configure this product separately. See the Certification Matrix (<https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html>) for a list of supported databases for each product.
- If you are configuring an additional instance of Oracle Hyperion Financial Data Quality Management, Enterprise Edition 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**.
- Each Oracle Essbase Studio Server instance must have its own catalog database.
- If you are configuring an Oracle database, EPM System Configurator checks that the database was created with the correct character set. If not, you are prompted to correct it.

## Setting Up Microsoft SQL Server Windows Authentication

To set up Windows authentication for a SQL Server connection:

1. Configure SQL Server to use Windows authentication.
2. Grant your Windows account appropriate access to your database.
3. From the configuration task list, select **Configure Database**.
4. From the database list, select **SQL Server**.
5. Specify all database information except for **Username** and **Password**.

You must also specify a domain user for Windows services on the **Common Settings** page of EPM System Configurator, in **Run Windows Services as non-local system account**. See [Configure Common Settings](#).

## Advanced Options for Database Configuration (Optional)

The following table describes advanced options for database configuration.

EPM System Configurator Fields	Description	Your Information
Edit and use modified JDBC URL	Select to specify a JDBC URL for the database connection.	
JDBC URL	<p>Enter additional attributes for the database connection.</p> <p>If you enter a JDBC URL, it overrides the values that you entered in the Configure Database page.</p> <p>For an Oracle database, you can enter an LDAP-based JDBC URL. See <a href="#">JDBC URL Attributes</a> for more information.</p>	
Use secure connection to the database (SSL)	<p>Select to enable secure communication to the database.</p> <p>To use an SSL-enabled JDBC connection, you must also enter specific parameters.</p> <p>See <a href="#">JDBC URL Attributes</a> for more information.</p> <p>See the <i>Oracle Enterprise Performance Management System Security Configuration Guide</i> to see whether selecting this option is appropriate for your SSL implementation.</p>	
Trusted Keystore	Enter or browse to the location of the keystore.	
Trusted Keystore Password	Enter the password for the keystore.	
<b>For Oracle</b> Data Tablespace	Enter the name of an existing tablespace used to store table data. The data tablespace is the logical portion of the database used to allocate storage for table data.	
Index Tablespace	To specify the database tablespaces in which the indexes are created, select the index location.	

## Foundation Configuration Tasks

### Related Topics

- [Configure Common Settings](#)
- [Configure Logical Address for Web Applications](#)
- [Set Shared Services Admin User and Password](#)
- [Scale Out Single Managed Server on This Machine](#)

- [Configure Web Server](#)

## Configure Common Settings

Specify settings for all products on all machines that have been identified in the Oracle Hyperion Shared Services Registry so far, or click or select **Next** to accept the default values.

The **Configure Common Settings** page appears once per Oracle Enterprise Performance Management System deployment.

If you configure on another machine and change any of these options, your new selections apply for all products and machines that you have not configured. If you reconfigure on a machine, the new settings apply to any products that you reconfigure and to future configurations.

The following table describes options for common settings configuration.

EPM System Configurator Fields	Description	Your Information
Create Windows Services for configured components (Windows only)	Select to configure each service as a Windows service that starts automatically when you start Windows.	
Run Windows Services as non-local system account	Select to specify a non-local system account to configure Windows services, and then specify a user name and password. This user should be a member of the Administrators group.  If you do not select this option, EPM System Configurator creates Windows services using the local system account. Before you start the services, change them to use the appropriate domain account	
User name	Enter the user name for the user to launch the Windows services. If you leave this field blank, EPM System Configurator creates the services using the local system account.	
Password	Enter the password for the user used to launch Windows services.	

EPM System Configurator Fields	Description	Your Information
Use SSL for Web application server communications (requires manual configuration)	Depending on your SSL implementation, select to use SSL communication for all Java web applications. If this option is selected, URLs are in the form <code>https</code> .	
Mail Server Host	<p>Optionally, you can deploy non SSL and reconfigure to use SSL. See the <i>Oracle Enterprise Performance Management System Security Configuration Guide</i>.</p> <p>For products that integrate an e-mail feature, which uses standard Simple Mail Transfer Protocol (SMTP) protocol, specify the outgoing mail (SMTP) server. To enable e-mail alerts, you must specify the SMTP server name.</p>	

 **Note:**

Selecting this option does not enable secure communication for the Java web application server and does not create and load certificates into JREs and JDKs. See for more information.


EPM System Configurator Fields	Description	Your Information
Outgoing Port	Specify the mail server port number or accept the default value. If you are using SSL to communicate with the mail server, enter an SSL port.	
Incoming Port	Specify the mail server port number or accept the default value. If you are using SSL to communicate with the mail server, enter an SSL port.	
Administrator's Email Address	Specify the administrator's e-mail address to use for notifications.	
Use SSL to communicate with mail server	Select to use SSL communication for all e-mail communication.	
Use authentication to send email	Specify whether the mail server requires authentication, and then specify a user name and password.	
User Name	Specify the user name for the SMTP server.	
Password	Specify the password for the SMTP server.	



EPM System Configurator Fields	Description	Your Information
LCM Export Import Location	<p>Enter the location from which to export and import Oracle Hyperion Enterprise Performance Management System Lifecycle Management artifacts.</p> <p>If you have a clustered environment and plan to use Lifecycle Management to migrate artifacts, specify a shared drive location. The shared location must be accessible to all Oracle Hyperion Shared Services instances. When artifacts are exported using Lifecycle Management, the content is exported to a path on a shared disk; when imported, the content is read from the exported location on the shared disk.</p> <p>To enable data migration across distributed environments, specify a shared file system path defined using UNC syntax that is accessible from all the servers in the deployment. For example, to specify a shared drive location on Windows, enter <code>\sharedHost\sharedLocation</code>.</p>	

 **Note:**

If you are using Oracle Hyperion Financial Management in a distributed environment, configure the folder with Read/Write access for all the Financial

EPM System Configurator Fields	Description	Your Information
	 Management Application Servers in the environment.	
	After configuration, restart all instances of Shared Services.	
	For each instance, start Shared Services as a service using the login of a domain user who has access to the shared disk/folder.	
Enable SSL Offloading	Select this option if you are using an SSL Offloader. See for more information.	
External URL Host	Specify the host name for the external URL.	
External URL Port	Port number for the external URL.	

## Configure Logical Address for Web Applications

Specify the logical address details to use for Java web applications, or click or select **Next** to accept the defaults:

Use this option to change the logical address for a deployed Java web application, for example if you are using a load balancer. This task lets you change the logical address without redeploying the Java web application. You can select this task during initial Java web application deployment.

For Oracle Hyperion Financial Reporting linked reports to work, configure Financial Reporting so that the logical address of the Financial Reporting component is same as web server port (for example, 19000).

 **Note:**

You need to perform this task on only one machine in the deployment.

The following table describes options for configuring the logical addresses to use for Java web applications.

EPM System Configurator Fields	Description	Your Information
Set the logical web address for all the applications to / Set the logical address for each application individually to	Select whether to apply the same address to all Java web applications or to apply a different address to each Java web application	
Product Component	Shows the components for which a Java web application is deployed	
Host	For each enabled module, review the host name to which this web server proxies requests.	
Port	Review or update the port numbers for the application server listen ports for the applications. The port here must match the listen port of the deployed application.	
SSL Port	Review or update the SSL port of the logical web address.  If you are using SSL, you should disable the non-SSL port (or redirect it to the SSL port) in your Java application server after configuration to ensure secure communication.	
Context	Review the context path. The context path is the part of the URL that accesses the deployed Java web application. For example, in the following URL, <code>workspace</code> is the context path:  <code>http:// webserverhost.example.com: 19000/workspace</code>	

**Note:**


Use fully qualified host names for all entries. For example, `webserverhost.example.com`.

## Set Shared Services Admin User and Password

For hardened security, reset the password for the Oracle Hyperion Shared Services admin user. Optionally, specify an admin name other than the default, `admin`.

EPM System Configurator creates a preprovisioned user (called `admin` by default), which enables you to log on to Shared Services after configuration to create and provision users. EPM System Configurator requires you to specify a new admin password during configuration. After configuration, make subsequent changes to the admin user password in the Oracle Hyperion Shared Services Console. See the *Oracle Enterprise Performance Management System Security Configuration Guide*.

The following table describes options for resetting the Shared Services admin user password.

EPM System Configurator Fields	Description	Your Information
Admin Name	Optionally, specify a name other than the default name <code>admin</code> for the Shared Services administrator user.	
Password	Enter a new password for the Shared Services admin user.	 <b>T</b> <b>i</b> <b>p</b> <b>:</b> <b>M</b> <b>a</b> <b>k</b> <b>e</b> <b>a</b> <b>n</b> <b>o</b> <b>t</b> <b>e</b> <b>o</b> <b>f</b> <b>t</b> <b>h</b> <b>i</b> <b>s</b> <b>p</b> <b>a</b> <b>s</b> <b>s</b> <b>w</b> <b>o</b> <b>r</b> <b>d</b> <b>.</b>
Re-type Password	To confirm the new password, re-enter the password for the Shared Services admin user.	

## Scale Out Single Managed Server on This Machine

If you have deployed Oracle Enterprise Performance Management System Java web applications to a single managed server, use this option to scale out the server.

The **Scale out single managed server on this machine** option is only available when the following are true:

- The WebLogic Administration Server is not installed on the current machine.

- The single managed server is deployed on the WebLogic Administration Server.
- The single managed server is not already scaled out on the machine.

See "Scaling Out a Single Managed Server" in the *Oracle Enterprise Performance Management System Deployment Options Guide*.

## Configure Web Server

Specify web server information, or click or select **Next** to accept the defaults.

Information in this page comes from applications already deployed and recorded in the Oracle Hyperion Shared Services Registry and applications you are deploying in this configuration sequence.

If you deploy any additional products, reconfigure the web server and then restart it (or simply restart it if you configured Oracle HTTP Server to a shared drive) on each machine hosting Oracle Hyperion Foundation Services.

Then, refresh Oracle Hyperion Enterprise Performance Management Workspace on each Foundation Services host machine in your deployment.

See [Refreshing EPM Workspace](#).



### Note:

Enabling SSL for the web server requires manual configuration. See the *Oracle Enterprise Performance Management System Security Configuration Guide*.

The following table describes options for the web server configuration.

EPM System Configurator Fields	Description	Your Information
Web Server Type	<p>Select the web server.</p> <p>To manually configure a web server, select <b>Setup Registry for manual web server configuration</b>.</p> <p>See <a href="#">Manually Configuring Oracle HTTP Server</a> for details on manually configuring a web server.</p> <p>If you are using Oracle HTTP Server, you can configure to a shared drive location to simplify configuration in a distributed environment. Click <b>Advanced Options</b> and then specify the shared drive location. This shared location must be accessible from all web servers in the deployment and must a UNC path, not a mapped drive.</p>	
Web Server Port	<p>Specify the web server port. If you use SSL, ensure that the port number that you enter is a secure port.</p>	

EPM System Configurator Fields	Description	Your Information
Set the logical web address for the web applications to this web server	<p>Select this option if you want EPM System Configurator to set the logical web address for all Java web applications to the web server. Use this option if you want to use the web server as the load balancer.</p> <p>If you do not select this option, EPM System Configurator uses the address of the physical Java web application as the logical address.</p>	
Component	Review the components for which the web server is being configured.	

## Essbase Configuration Tasks

### Related Topics

- [Configure Essbase Server](#)
- [Essbase Studio Default Data Files Location](#)

## Configure Essbase Server

Specify the configuration information for Oracle Essbase Server, or click or select **Next** to accept the default settings. In general, Oracle recommends that you keep the default settings.

During configuration, EPM System Configurator automatically registers Essbase with Oracle Hyperion Shared Services and writes the Shared Services connection information to `essbase.cfg` (in `ARBORPATH/bin`). In addition, it specifies environment variables in a file used to launch Essbase Server.

The following table describes the configuration options for Essbase Server.

Table 6-6 Essbase Server Configuration

EPM System Configurator Fields	Description	Your Information
Essbase Cluster Name	<p>Specify a cluster name to create a cluster to provide active-passive Essbase failover support with write-back capabilities. You can include only two Essbase instances in a cluster.</p> <p>When you configure the first instance of Essbase on the first machine, you define the cluster. When you configure the second instance of Essbase on the second machine, select <b>Assign to Existing Cluster</b>, select the cluster, and then click <b>OK</b> to add this Essbase Server to the cluster you created on the first machine.</p> <p>The Essbase cluster name must be unique in a deployment environment. It cannot contain special characters or spaces.</p> <p>See "Configuring Active-Passive Essbase Clusters (Windows)" in the <i>Oracle Enterprise Performance Management System Deployment Options Guide</i>.</p>	
Agent Port Number	<p>Accept the default port number on which the Essbase listens for client requests. If you change the default value, enter a port number that is not used by other programs.</p> <p>Select <b>Active</b> to enable the agent to listen on this port.</p>	
SSL Agent Port Number	<p>Specify the SSL port on which Essbase listens for client requests.</p> <p>Select <b>Active</b> to enable the agent to listen on this port.</p>	
Start Port	<p>Accept the default number or enter the first port number on which the Essbase Server listens for client requests.</p> <p>The port value is stored in <code>essbase.cfg</code> (in <code>ARBORPATH/bin</code>).</p>	
End Port	<p>Enter the greatest port number that Essbase Server can use to connect.</p> <p>Essbase uses at least two ports for each application. For a large number of applications, you need a larger port range.</p>	

**Table 6-6 (Cont.) Essbase Server Configuration**

EPM System Configurator Fields	Description	Your Information
Full path to application location (ARBORPATH)	The location for applications. You can specify the path using universal naming convention (UNC) format.	



**Note:**

Previous versions of Essbase used *ARBORPATH* to refer to the installation location.



Table 6-6 (Cont.) Essbase Server Configuration

EPM System Configurator Fields	Description	Your Information
Set the language to be used by Essbase (ESSLANG)	<p>The <i>ESSLANG</i> variable is a locale definition. For example, to support American English, set ESSLANG to English_UnitedStates.Latin1@Binary.</p> <p>Based on the value you specify, EPM System Configurator updates <code>setEssbaseEnv.bat</code> (in <code>/EssbaseServer/essbaseserver1/bin</code>) with the <i>ESSLANG</i> value and Essbase uses this value.</p> <p>Verify the operating system locale setting on your computer and select the matching <i>ESSLANG</i> value. The <i>ESSLANG</i> setting for a computer must agree with the locale setting of the computer's operating system.</p> <p>In addition, on a Windows machine, the <i>ESSLANG</i> value and the system locale must match the language of the Oracle Hyperion Planning application that you plan to take offline.</p> <p>You must choose the correct <i>ESSLANG</i> setting for Essbase products to start successfully. The <i>ESSLANG</i> setting can affect the function of applications and databases.</p> <p>On Windows, if <i>ESSLANG</i> is already set on the computer (for example, if you have already installed Essbase), the current value is selected by default.</p> <p>For more details about <i>ESSLANG</i>, see <a href="#">ESSLANG Variable</a>. For the full list of supported <i>ESSLANG</i> values, see <i>Oracle Essbase Database Administrator's Guide</i>.</p>	
Binding Host Name	<p>Specify a Binding Host Name to have Essbase bind only to the IP address for the specified Binding Host Name. Otherwise, at startup, Essbase binds on all available IP addresses.</p>	

## ESSLANG Variable

Each Oracle Essbase Server installation requires that you set an *ESSLANG* value. See the topic on managing file encoding in the *Oracle Essbase Database Administrator's Guide*.

The default value for *ESSLANG* is `English (Latin1)`. For examples of *ESSLANG* values for non-English languages, see the list of supported locales in the Unicode-mode applications topic in the *Oracle Essbase Database Administrator's Guide*.

During configuration, EPM System Configurator writes the *ESSLANG* value that you specify to the Oracle Hyperion Shared Services Registry and to the launch file used to start Essbase.

For Oracle Essbase Administration Services and Oracle Hyperion Provider Services, there is no prompt to specify the *ESSLANG* value; it is set to the default value "English\_UnitedStates.Latin1@Binary."

## Managing ESSLANG Settings

The *ESSLANG* environment variable on the Oracle Essbase Server computer must retain the locale value of an application for as long as that application is in use.

### Note:

If the *ESSLANG* variable is changed after applications are created on an Essbase Server computer, those applications cannot be started.

To avoid possible database corruption, the *ESSLANG* locale specification must be the same on client and Essbase Server in the following situations:

- The client is not Unicode-enabled.
- A Unicode-enabled client saves an outline over an existing outline on a version of the Essbase Server that is not Unicode-enabled.
- A Unicode-enabled client saves an outline to a non-Unicode application on a Unicode-enabled Essbase Server.

The *ESSLANG* locale specifications on clients and Essbase Server computers can be different when a Unicode-enabled client views and updates an outline belonging to a Unicode-mode application.

For products that use Essbase RTC in a non-English environment, you must set *ESSLANG* manually on the client.

## Essbase Studio Default Data Files Location

Specify the default location to be used for data files, or click or select **Next** to accept the default.

The following table describes options for Oracle Essbase Studio default data files location.

EPM System Configurator Fields	Description	Your Information
Default Data Files Location	Specify the default location for data files. By default the location is C: \Oracle\Middleware \user_projects \epmsystem1\BPMS\datafiles.	

## Financial Reporting Configuration Tasks

### Related Topics

- [Configure Financial Reporting RMI Ports](#)

## Configure Financial Reporting RMI Ports

Specify the following options to configure the Oracle Hyperion Financial Reporting RMI port range, or click or select **Next** to accept the defaults.

The following table describes options for Financial Reporting RMI port configuration.

EPM System Configurator Fields	Description	Your Information
Port Range	Specify the range of ports to use, or click or select <b>Next</b> to keep the default port ranges.	

## Planning Configuration Tasks

### Related Topics

- [Configure Planning RMI Server](#)

## Configure Planning RMI Server

Specify the following options to configure the Oracle Hyperion Planning RMI Server port, or click or select **Next** to accept the defaults.

The following table describes options for Planning RMI Server port configuration.

EPM System Configurator Fields	Description	Your Information
RMI Port	Specify the port to use, or click or select <b>Next</b> to keep the default port.	

## Financial Management Configuration Tasks

You must run EPM System Configurator as an administrator to configure Oracle Hyperion Financial Management.

## Financial Management — Configure Server

Specify the server information, or click or select **Next** to accept the defaults.

EPM System Configurator Fields	Description	Your Information
Port	Review or change the default port number on which Oracle Hyperion Financial Management listens for client requests. If you change the default value, enter a port number that is not used by other programs. Select <b>Active</b> to enable the server to listen on this port.	
SSL Port	Review or change the SSL port on which Financial Management listens for client requests. If you change the default value, enter a port number that is not used by other programs. Select <b>Active</b> to enable the server to listen on this port.	
Max App Server Delay	Accept the default value or enter the time interval in seconds between when a change is made to an application and when the change is visible to users accessing the application through another application server.	
Max Data Sync Delay	Accept the default value or enter the time interval in seconds between when a change is made to data and when the change is visible to users accessing the data through another application server.	
Database Connection Pool Size	Specify the number of maximum pooled relational database connections for the application. Financial Management requires approximately 25 relational database connections per application.	
Start Port	Accept the default number or enter the first port number in the range for the datasource connection.	
End Port	Accept the default number or enter the last port number in the range for the datasource connection.	

## Financial Management — Configure Cluster

Specify the names of the application servers that participate in the cluster.

An application server cluster is a set of application servers running the same application. Clustered application servers provide load balancing and failover capability and enable the servers to be transparently maintained while applications remain available for users.

The following table describes options for Oracle Hyperion Financial Management cluster configuration.

EPM System Configurator Fields	Description	Your Information
Defined Clusters	<p>Select the cluster for which you want to specify servers.</p> <p>This list displays all clusters you have specified on any machine in the installation.</p> <p>You can also add, edit, or remove a cluster.</p> <p>When you add a cluster, specify the cluster name, and select <b>Use Sticky Server</b> if you want to direct all requests for a specific session to the same server.</p>	
Available Servers	<p>Select the server that you want to include in the cluster, and click or select <b>Add</b>.</p> <p>The list displays all available servers. If there is only one server, it is listed here. Servers already in a cluster are not available and are not listed.</p>	
Servers in the Cluster	<p>The list displays all servers in the currently selected cluster. To remove a server from the list, select it and click or select <b>Remove</b>.</p>	

If you use multiple application servers connected to one database server, you must ensure that the system clocks on the application servers are synchronized. If the clocks are not synchronized, the data being viewed might not be current.



**Note:**

The synchronization between Financial Management application servers is based on system time. Changing the clock can affect this synchronization. For the time change to and from Daylight Savings Time, Oracle recommends that you stop the servers before the time change and restart them afterward.

## Financial Close Management Configuration Tasks

### Related Topics

- [Financial Close Custom Settings](#)

## Financial Close Custom Settings

If you have an existing content management system, you can configure Oracle Hyperion Financial Close Management to link to the documents stored in it.

Specify the location of a Document Management System to use.

The following table describes options for Financial Close Management custom settings configuration.

EPM System Configurator Fields	Description	Your Information
URL	<p>Enter the URL of the system hosting the Document Management system.</p> <p>For example for Release 10g, enter:</p> <pre>http://host:port/</pre> <p>For example for Release 11g, enter:</p> <pre>http://host:port/cs/</pre> <p>See the Certification Matrix (<a href="https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html">https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html</a>) for information about supported document management systems.</p>	

## Configuration Summary

Confirm the configuration tasks to complete, and then click or select **Next**. Or, click or select **Back** to make changes.

EPM System Configurator displays the progress and status of each configuration task.

Configuration time depends on the products and tasks that you selected. Progress is recorded in `/diagnostics/logs/config/configtool.log`.

When configuration is complete, EPM System Configurator shows the summary of the configuration, indicating which tasks completed and whether any tasks failed.

Click or select **Task Panel** to select additional configuration tasks, click or select **Finish** to close EPM System Configurator.

## Performing Silent Configurations

Silent configurations automate the configuration process so that you can configure Oracle Enterprise Performance Management System products on multiple computers without manually specifying configuration settings on each machine.

To enable silent configurations, record your configuration settings in a response file. You can then run a silent configuration from the command line, using the configuration options that were saved in the response file.

### Note:

If you are performing a silent configuration using Remote Desktop, run it using an admin console session. (Launch Remote Desktop using `mstsc /admin`).

To record configuration settings and run a silent configuration:

1. Navigate to the directory that contains EPM System Configurator. By default, the directory is `/common/config/version_number`.
2. From a command line prompt, enter `configtool.bat -record filename` or `./configtool.sh -record filename`, where *filename* includes an absolute path or file name.

The file is saved in XML format, but you need not save the file with a `.xml` extension.

EPM System Configurator launches.

If you do not specify a file name, EPM System Configurator creates the file for you: `/common/config/version_number/configResponse.xml`.

3. Proceed through the EPM System Configurator, specifying the options that you want to record.

 **Note:**

When you are recording silent configurations, you can proceed through EPM System Configurator only one time. (You cannot select go back to the Product Selection page to continue with more configuration tasks.) If you return to the Task Selection page, the response file is rerecorded.

Configuration options are recorded in the response file, which is in XML format. Passwords are saved in encrypted format in the response file.

You are now ready to configure products in silent mode.

4. Copy the response file to the machine on which you configure products. You can also copy the file to a network drive that is accessible from the machines you want to configure.
5. From the command line, enter a command:

```
configtool.bat -silent filename OR ./configtool.sh -silent filename.
```

The configuration runs in the background.

You can also record configuration settings from within EPM System Configurator. To record configuration settings, during configuration, on the Configuration Confirmation page, click or select Save, browse to a location, specify a file name, and click or select Save. The file is saved in the same format as for silent configurations.

Silent response files are not compatible between earlier releases and Release 11.2. If you created silent response files for use with any earlier release of EPM System, you must re-create them for use with EPM System Release 11.2.

You can modify the response file later to change configuration options.

You can use the same silent response file in different environments even when each environment has a different set of passwords for the database, WebLogic, and the Oracle Hyperion Shared Services Admin user. For security reasons, in the generated silent file, password values are stored in encrypted format but EPM System Configurator also supports unencrypted format. Oracle recommends that you change

the password properties for Database, WebLogic, and Shared Services in the silent file to the following format:

```
Database Password
<property name="password" encrypt="true">clearTextPasword</property>

Weblogic Admin Password in applicationServerDeployment section
<property name="adminUser">epm_admin</property>
<property name="adminPassword" encrypt="true">clearTextPasword</property>

Shared Services Admin Password in bean name="customConfiguration" for
Foundation
<property name="adminUserName">admin</property>
<property name="adminPassword" encrypt="true">clearTextPasword</property>
```

Copy a version of the file for each environment and replace *clearTextPassword* with the appropriate password for that environment. After executing the silent file for each environment, for security reasons, if the file is writable by EPM System Configurator, the password is stored in the file in an encrypted format.

## What Happens During Configuration

During product configuration, EPM System Configurator completes these actions:

- Performs the configuration tasks that you selected
- Configures each product to start as a Windows service, if you select this option on the "Configure Common Settings" page during configuration
- Creates a default Oracle Hyperion Shared Services Administrator role in Native Directory when you configure Oracle Hyperion Foundation Services. This is the only preprovisioned user created. Subsequently, when you use EPM System Configurator to register products with Shared Services, the Shared Services Administrator role is provisioned with the product administrator role.

## Troubleshooting Configuration

Configuration results are noted in `/diagnostics/logs/config/configtool_summary.log`.

If you encounter errors, perform these tasks:

- Configure products individually.
- See the *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide* for information about configuration checks, debugging using logs, troubleshooting methodology, and solutions to common configuration issues.





**Tip:**

EPM System Configurator provides a script, `ziplogs`, in `EPM_ORACLE_INSTANCE/bin`. You can run this script to provide files to Support for troubleshooting installation and configuration issues. This tool collects all log files, including logs for installation, configuration, and validation and registry reports if you have used those tools, and saves them in ZIP file in `/diagnostics/ziplogs`.

## Manually Configuring Oracle HTTP Server

You can choose to manually configure the Oracle HTTP Server installed by EPM System Installer instead of configuring it with EPM System Configurator.

If you are using a supported web server other than the Oracle HTTP Server that is installed by EPM System Installer, you must manually configure the web server.

Manual web server configuration notes:

Manual configuration of IIS is not supported.

To manually configure a web server:

This section assumes you have already used EPM System Configurator to configure Oracle Enterprise Performance Management System components and deployed Java web applications manually or by using EPM System Configurator.

To manually configure Oracle HTTP Server:

1. Launch EPM System Configurator: Change to `EPM_ORACLE_INSTANCE\BIN` and then launch `configtool.bat | sh`.
2. In EPM System Configurator, on the Task Selection panel, select **Uncheck All**, expand **Hyperion Foundation**, select **Configure Web Server**, and then click **Next**.
3. In **Configure Web Server**, from **Web Server Type**, select **Setup Registry for manual web server configuration**, and then click **Next**.
4. Complete the steps in EPM System Configurator and, when configuration is complete, click **Finish**.  
EPM System Configurator creates autogenerated files in `EPM_ORACLE_INSTANCE/httpConfig/autogenerated/ohs` to simplify manual web server configuration.
5. Copy the autogenerated files to a location of your choice related to your installation of Oracle HTTP Server.
6. If you configured Oracle HTTP Server and EPM System components to use SSL, update files as follows:
  - Update the port in `ssl.conf` in the "Listen" directive and in the `<VirtualHost>` tree-directive.
  - Update the port in `httpd.conf` in the "Listen" directive to any port other than the SSL port.

- Update the port in `HYSL-WebLogic-autogenerated.conf` in the `<VirtualHost>` tree-directive to any port other than the SSL port.
7. Update `HYSL-WebLogic-autogenerated.conf` as follows:
- If necessary, update all "LoadModule" directives so that the `{ORACLE_HOME}` environment variable is correct.
  - Update the `OHS_LISTEN_PORT` alias and replace it with the actual value, for example `<VirtualHost *:OHS_LISTEN_PORT>` would be `<VirtualHost *:19000>`.
  - Update the following lines with the actual file location:

```
Include "conf/epm_online_help.conf"
```

```
Include "conf/epm_rewrite_rules.conf"
```

```
Include "conf/epm.conf"
```

For example:

```
Include "path_to_conf_files/epm_online_help.conf"
```

```
Include "path_to_conf_files/epm_rewrite_rules.conf"
```

```
Include "path_to_conf_files/epm.conf"
```

8. In the Oracle HTTP Server installation folder, browse to `httpd.conf`, open it in a text editor, and make the following changes:
- a. Comment all the lines that contain `ssl.conf` and `mod_wl_ohs.conf`.
  - b. Add the following lines to the end of the file:
    - Include `path_to_modified_conf_files/HYSL-WebLogic-autogenerated.conf`
    - Include `path_to_modified_conf_files/ssl.conf`

where `ssl.conf` is the autogenerated file

You can use UNC-style paths on Windows only if the Oracle HTTP Server Windows Service is running as a user account that has network access and has "Logon as a service" rights.
  - c. Update the "Listen" directive with the actual web server's port.
9. Update the `WEB_SERVER` component in the Oracle Hyperion Shared Services Registry so that the `port` property is the actual value of the port on which Oracle HTTP Server is running. For example, to change the actual port to 19000:
- a. Generate a registry report by launching `EPM_ORACLE_INSTANCE/bin/epmsys_registry.bat`. Enter the Oracle Hyperion Shared Services database password when prompted.

- b. Look for the `WEB_SERVER` component with properties `"type" = MANUAL`, `"port" = -1`, and `"instance_home"` with the `EPM_ORACLE_INSTANCE` that is configured.
- c. Look for the object id for the `WEB_SERVER` component, and copy it into following command:

```
EPM_ORACLE_INSTANCE/bin/epmsys_registry.bat updateproperty  
#object_id/@property_name property_value
```

For example:

```
EPM_ORACLE_INSTANCE/bin/epmsys_registry.bat updateproperty  
#df17801dfc1dca40S24e400aa13a736f8a46S7921/@port 19000
```

10. Restart Oracle HTTP Server and EPM System servers.

# 7

## Upgrading EPM System

### Related Topics

- [About Upgrading](#)
- [Supported Paths to Release 11.2](#)
- [Upgrading Checklist](#)
- [Upgrade Installation Prerequisites](#)
- [Preparing Artifacts and Data for Upgrading](#)
- [Downloading and Preparing Files for Installation](#)
- [Installing EPM System Products for an Upgrade](#)
- [Restoring the Financial Management Schema](#)
- [Configuring EPM System Products for an Upgrade](#)
- [Starting EPM System Services](#)
- [Validating the Installation](#)
- [Importing Artifacts and Data for Release 11.2](#)
- [Importing Performance Management Architect Application Metadata into Data Relationship Management](#)
- [Exporting from Data Relationship Management and Importing to EPM Applications](#)
- [Validating the Installation](#)
- [Repeating the Upgrade Process for Applications](#)
- [Upgrading EPM System Clients](#)

## About Upgrading

This chapter describes the upgrade process for Oracle Enterprise Performance Management System products.

You can upgrade EPM System products to Release 11.2.x from Release 11.1.2.4.xxx. To update your existing applications, you deploy EPM System Release 11.2.x software on a new machine and migrate EPM System Release 11.1.2.4.xxx artifacts (such as applications, metadata, and security) and data to the new deployment.

For more information about upgrading clients, see [Upgrading EPM System Clients](#).

For information about EPM System products that are no longer available in Release 11.2.x, see the *Oracle Enterprise Performance Management System Installation and Configuration Readme*.

## Supported Paths to Release 11.2

You can move to Oracle Enterprise Performance Management System Release 11.2.x from Release 11.1.2.4.xxx, including Release 11.1.2.4.700 and Release 11.1.2.4.900. You must be on the latest patch for your release.

**Table 7-1 Supported Paths to Release 11.2.x**

Upgrade From	Upgrade To
Release 11.1.2.4.xxx, including Release 11.1.2.4.700 and Release 11.1.2.4.900	Release 11.2.x
For Oracle Hyperion Financial Close Management, you can upgrade only from Release 11.1.2.4_253.	Release 11.2.x
For Oracle Hyperion Financial Data Quality Management, Enterprise Edition, you can upgrade only from Release 11.1.2.4.220. Note that PSU .220 is included in Release 11.1.2.4.700 and Release 11.1.2.4.900.	Release 11.2.x

## Upgrading Checklist

The following table identifies the high-level tasks that you perform to upgrade Oracle Enterprise Performance Management System products. You must perform tasks in this order and you must complete the entire checklist.

The process described in this chapter assumes that you upgrade one product at a time and indicates where a sequence is required.

**Table 7-2 Upgrading Checklist**

Task	Reference
Go through the tasks in the following section once for all EPM System products at one time.	
<b>Preparing to Upgrade</b>	
1. Review release compatibility, system requirements, and other prerequisites for this release.	<i>Oracle Enterprise Performance Management System Certification Matrix</i> ( <a href="https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html">https://www.oracle.com/middleware/technologies/bi-foundation/hyperion-supported-platforms.html</a> )
If your database environment needs to be upgraded, perform the database upgrade before you proceed. See the database documentation for details.	

Table 7-2 (Cont.) Upgrading Checklist

Task	Reference
<p>2. Prepare the new environment for the new Release 11.2 installation.</p> <p>In preparation for a new installation, you can use a worksheet to note the machines on which earlier release products are installed, and the machines on which you plan to install the new release products. You can refer to this information in subsequent procedures.</p> <p>Create new repositories in preparation for migrating or copying data as described in <a href="#">Preparing a Database</a>.</p>	<a href="#">Preparing Your Environment</a>
3. Perform upgrade-specific prerequisite tasks.	<a href="#">Upgrade Installation Prerequisites</a>
4. Prepare artifacts, applications, data, and security information from your Release 11.1.2.4.xxx environment for upgrading. You can perform this task for each product in any order.	<a href="#">Preparing Artifacts and Data for Upgrading</a>
5. Download and prepare the installation files.	<a href="#">Downloading Files for Installation</a>
<p>Iterate through the remaining checklist items for each product, one product at a time, in the following order:</p> <ul style="list-style-type: none"> <li>• Oracle Hyperion Foundation Services</li> <li>• Oracle Essbase Server and all other Essbase products. Note that after configuring other products, you must also configure the web server. After configuration, restart the web Server and Oracle Hyperion Enterprise Performance Management Workspace.</li> <li>• All other EPM System products, in any order. Note that after configuring each product, you must also configure the Web server. After configuration, restart the Web Server and EPM Workspace.</li> </ul>	
<b>Installing and Configuring</b>	
6. Install EPM System Release 11.2 products (choosing the <b>New installation</b> option) in a new installation location.	<a href="#">Installing EPM System Products for an Upgrade</a>
7. Before configuring Oracle Hyperion Financial Management, restore the schema.	<a href="#">Restoring the Financial Management Schema</a>

Table 7-2 (Cont.) Upgrading Checklist


Task	Reference
<p>8. Configure Release 11.2 products, one at a time.</p> <p>You must configure Foundation Services first. Foundation Services must be installed and configured for other products to configure successfully.</p> <p>If you have already configured the web server and you configure any additional products, you must run EPM System Configurator again and select the Foundation Services <b>Configure Web Server</b> task. Then, restart the web server and EPM Workspace.</p>	<a href="#">Configuring EPM System Products for an Upgrade</a>
<div style="border-left: 2px solid #0070C0; border-right: 2px solid #0070C0; border-bottom: 2px solid #0070C0; padding: 10px; background-color: #E6F2FF;"> <p> <b>Note:</b></p> <p>When you upgrade Financial Management, special steps are required during configuration.</p> </div>	
<p>9. Start EPM System services.</p>	<a href="#">Starting and Stopping EPM System Products</a>
<p>10. Using Oracle Hyperion Enterprise Performance Management System Diagnostics, validate the installation.</p>	<a href="#">Validating the Installation and Verifying Deployment</a>
<p>11. Configure any external authentication directories that were used in Release 11.1.2.4.</p>	<a href="#">Oracle Enterprise Performance Management System Security Configuration Guide</a>
<p>12. Install and configure Oracle Data Relationship Management if you are using it, following the steps for upgrading from Release 11.1.2.4.</p>	<a href="#">Data Relationship Management Installation Guide</a>
<p><b>Import applications, data, security, and other artifacts</b></p>	

Table 7-2 (Cont.) Upgrading Checklist

Task	Reference
13. Import artifacts including applications, data, and security information. Note the required sequence: <ol style="list-style-type: none"><li>1. Users and groups.</li><li>2. Applications and data.</li><li>3. Oracle Hyperion Calculation Manager artifacts.</li><li>4. Provisioning information and taskflows.</li></ol>	<a href="#">Importing Artifacts and Data for Release 11.2</a>

 **Note:**

Before you perform this step, make sure you have moved the LCM export files that you exported from Release 11.1.2.4 to the Oracle Hyperion Enterprise Performance Management System Lifecycle Management Release 11.2 **LCM Export Import Location** that you defined during configuration.




**Table 7-2 (Cont.) Upgrading Checklist**

Task	Reference
14. If you were working with Oracle Hyperion EPM Architect-based applications in Release 11.1.2.4, and want to manage metadata in Data Relationship Management in Release 11.2, import Performance Management Architect application metadata for your product into Data Relationship Management, and manage the metadata as needed in preparation for importing metadata to your Release 11.2 application.	<a href="#">Importing Performance Management Architect Application Metadata into Data Relationship Management</a>

 **Note:**

This step is required for Oracle Hyperion Profitability and Cost Management (Standard and Detailed applications). It is also required for Essbase, Oracle Hyperion Planning, and Financial Management if you want to manage metadata in Data Relationship Management.

Table 7-2 (Cont.) Upgrading Checklist

Task	Reference
15. If you are using Data Relationship Management to manage metadata, export metadata from Data Relationship Management and import it to your applications.	<a href="#">Exporting from Data Relationship Management and Importing to EPM Applications</a>
<div style="border: 1px solid #0070c0; padding: 10px; background-color: #e6f2ff;"> <p> <b>Note:</b></p> <p>This step is required for Profitability and Cost Management (Standard and Detailed applications). It is also required for Essbase, Planning, and Financial Management if you want to manage metadata in Data Relationship Management.</p> </div>	
16. Perform required manual configuration tasks for Oracle Hyperion Financial Close Management.	<a href="#">Performing Manual Configuration Tasks in a New Deployment</a>
17. Restart EPM System services and re-run EPM System Diagnostics.	<a href="#">Validating the Installation and Verifying Deployment</a>

## Upgrade Installation Prerequisites

Before you proceed with an upgrade:

- Back up information from the earlier release including databases, schemas, applications, and other files. See the *Oracle Enterprise Performance Management System Backup and Recovery Guide* for Release 11.1.2.4.
- Optionally, for Release 11.1.2.4.xxx, for Oracle Hyperion Financial Management, Oracle Hyperion Financial Close Management, Oracle Hyperion Financial Reporting, and Oracle Hyperion Financial Data Quality Management, Enterprise Edition, review and delete any applications and artifacts that you will not be using in the new environment.
- Remove artifacts for reporting products that are no longer available. See the *Oracle Enterprise Performance Management System Installation and Configuration Readme*.

- Prepare a method for transferring artifacts from the Release 11.1.2.4 environment to the Release 11.2 environment.

If the Release 11.1.2.4 environment and Release 11.2 environment are on the same network, you can export artifacts to a shared drive. If your Release 11.1.2.4 environment and Release 11.2 environment are not on the same network, export to a location from which you can use a method such as ftp to transfer files to the Release 11.2 environment.

- If you configured Financial Close Management or Financial Management with other products in the same EPM System database in Release 11.1.2.4, extract database tables and other database objects separately for Financial Close Management and Financial Management. Use these extracts for restoring in the Release 11.2 environment.

For Financial Close Management, extract:

- Financial Close Management and Tax Governance: FCC%, FCM%, S\_ROW\_ID%
- Account Reconciliation Management: ARM%, FCM% and S\_ROW\_ID
- Supplemental Data Manager and Tax Supplemental Schedules: SDM%, FCM%, and S\_ROW\_ID

For Financial Management, extract primary keys, indexes, and sequences for:

- System Tables
  - \* HFM\_\*
  - \* HSV\_\*
  - \* HSX\_\*
  - \* XFM\_\*
- Application Tables
  - \* \*\_ACCOUNT\_\*
  - \* \*\_ATTACHMENTS
  - \* \*\_BINARYFILES
  - \* \*\_CELLTXTLBL\_\*
  - \* \*\_CONSMETH
  - \* \*\_CONSMETH\_\*
  - \* \*\_CSE\_\*
  - \* \*\_CSN\_\*
  - \* \*\_CURRENCIES
  - \* \*\_CURRENCIES\_\*
  - \* \*\_CUSTOM\_\*
  - \* \*\_DATATIMESTAMP
  - \* \*\_DATA\_AUDIT
  - \* \*\_DCE\_\*
  - \* \*\_DCN\_\*
  - \* \*\_DCT\_\*

- \* \*\_ENTITY\_\*
- \* \*\_ERPI
- \* \*\_ERPI\_URL
- \* \*\_ETX\_\*
- \* \*\_ICP\_\*
- \* \*\_ICRATE\_\*
- \* \*\_ICTRN\_\*
- \* \*\_ICT\_\*
- \* \*\_JLENT\_\*
- \* \*\_JLTMP
- \* \*\_JLTMPENT
- \* \*\_JL\_\*
- \* \*\_JPD\_\*
- \* \*\_LID\_\*
- \* \*\_MODULE\_CONFIG
- \* \*\_PARAMETERS
- \* \*\_PFLOW
- \* \*\_PFLOWH\_\*
- \* \*\_PFLOW\_\*
- \* \*\_PFLOW\_PHASEGROUP
- \* \*\_RPTS
- \* \*\_RTD\_\*
- \* \*\_RTS\_\*
- \* \*\_RUNNINGTASKS
- \* \*\_SCENARIO\_\*
- \* \*\_TASK\_AUDIT
- \* \*\_TASK\_AUDIT\_ATT
- \* \*\_TXTITEM\_\*
- \* \*\_TXT\_\*
- \* \*\_USERPARAMS
- \* \*\_VALUE\_\*

When you are done with this step, return to the [Upgrading Checklist](#).

## Preparing Artifacts and Data for Upgrading

Use the steps in the following sections to prepare artifacts and data from Release 11.1.2.4.xxx for upgrading. Most products use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export artifacts and data in preparation for upgrade. You move application artifacts from one environment to

another by downloading the artifacts from the File System node in Shared Services Console. When you download Lifecycle Management artifacts, they are saved in a ZIP file. You can then upload the ZIP file containing the artifacts to the Release 11.2 environment.

 **Note:**

The Lifecycle Management **Download** option is available only if the file system folder is a ZIP file on the server. The file system folder is zipped by Lifecycle Management during the export operation only if the folder size is less than or equal to 2 GB. For content greater than 2 GB, you must use a mechanism such as FTP to move the content from one environment to another. Copy the artifacts from the **LCM Export Import Location** you defined during Release 11.1.2.4 configuration to a location accessible to the Release 11.2 environment.

For details about using Lifecycle Management, see [Oracle® Enterprise Performance Management System Lifecycle Management Guide](#)

If the Release 11.1.2.4 environment and Release 11.2 environment are on the same network, you can export artifacts to a shared drive. If your Release 11.1.2.4 environment and Release 11.2 environment are not on the same network, export to a location from which you can use a method such as FTP to transfer files to the Release 11.2 environment.

## About Migrating from Performance Management Architect

Oracle Hyperion EPM Architect isn't available in Oracle Enterprise Performance Management System Release 11.2. If you're migrating to EPM System Release 11.2 and have metadata in Performance Management Architect Release 11.1.2.4, you can migrate the application metadata out of Performance Management Architect Release 11.1.2.4 into Oracle Data Relationship Management Release 11.2.

 **Note:**

This step is required for Oracle Hyperion Profitability and Cost Management (Standard and Detailed applications). It is also required for Oracle Essbase, Oracle Hyperion Planning, and Oracle Hyperion Financial Management if you want to manage metadata in Data Relationship Management.

If you have Performance Management Architect-based applications in Release 11.1.2.4 and want to manage metadata in Data Relationship Management Release 11.2, review this overview of the process. Detail about these steps is provided in the upgrade instructions for each product. Note that these steps are in addition to the tasks required for exporting and importing artifacts for each product.

1. Export your 11.1.2.4 application metadata from Performance Management Architect to a file using the EPMA File Generator Utility.

For more information on using the EPMA File Generator, see [From Performance Management Architect, Profitability and Cost Management, Essbase \(ASO\) and Essbase \(BSO\) Applications](#).

Then, update the file so that it's compatible with Data Relationship Management. This may be a file conversion utility or a manual procedure.

This step is covered in the "Preparing Artifacts and Data for Upgrading" section for your product.

2. Create an application in Data Relationship Management using predefined templates and import your application metadata (the converted file from the previous step) to it.

Then, manage your metadata in Data Relationship Management.

For more information about using Data Relationship Management to manage metadata, see [Importing Performance Management Architect Application Metadata into Data Relationship Management](#).

3. When your metadata is ready to be used in your EPM System Release 11.2 application, export application metadata out of Data Relationship Management and import it into your EPM System application. See [Exporting from Data Relationship Management and Importing to EPM Applications](#).

For more information, see *Oracle Data Relationship Management Integrating Oracle Data Relationship Management Suite with Enterprise Performance Management*.

## Preparing Foundation Services Artifacts for Upgrading

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export users, groups, provisioning information, and taskflows from Oracle Hyperion Foundation Services Release 11.1.2.4.xxx.

### Note:

You must export users and groups separately from provisioning information and taskflows.

To export artifacts from Foundation Services Release 11.1.2.4.xxx:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. In the View pane, expand the **Application Groups** node, expand the **Foundation** application group, and then select **Shared Services**.
4. Expand **Native Directory** and then click **Users** and **Groups**.
5. Click **Export**.
6. In the **Export** dialog box, in **File System Folder**, enter a name for the artifacts to be exported, and then click **Export**.  
Specify a meaningful name, such as  
`shared_services_users_groups_11.1.2.4.`

Check the status column and wait for **Completed** status.

7. Expand the **File System** node in Shared Services Console, right-click the Shared Services folder you created, and then select **Download**.
8. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.  
The entire contents of the ZIP file is downloaded as one file.
9. Copy the ZIP file to a location accessible to the Release 11.2 environment.
10. Repeat these steps, this time exporting provisioning information and taskflows: Expand **Native Directory** and then select **Assigned Roles** and **Roles**, and then select **Taskflows**. In the **Export** dialog box, in **File System Folder**, enter a meaningful name for the artifacts to be exported, such as `shared_services_provisioning_task_flows_11.1.2.4`.
11. If you are using an external authentication provider, repeat these steps, this time exporting assigned roles for your provider. In **Foundation**, **Shared Services**, expand *external authentication provider*, select **Assigned Roles**, and then click **Export**. Specify a meaningful name such as `aexternal_provider_provisioning_11124`.

## Preparing Essbase Applications for Upgrading

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export Oracle Essbase applications (metadata and data) from Release 11.1.2.4.xxx.

To export applications from Essbase Release 11.1.2.4.xxx:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. In the View pane, expand the **Application Groups** node, expand **EssbaseCluster-N**, and then select the application to export.
4. Click **Select All**.
5. Click **Export**.
6. In the **Export** dialog box, in **File System Folder**, enter a name for the artifacts to be exported, and then click **Export**.  
Specify a meaningful name, such as `essbase_application_name_11.1.2.4`.  
Check the status column and wait for **Completed** status.
7. Expand the **File System** node in Shared Services Console, right-click the Essbase folder you created, and then select **Download**.  
The **Download** option is available only if the folder size is less than or equal to 2 GB. Because the Essbase ZIP file is likely larger than 2GB, use an alternate method to access the file. For example, use a method such as FTP to transfer the folder to a location accessible to the Release 11.2 environment. By default, the exported folder is stored in `EPM_ORACLE_INSTANCE\import_export`.
8. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.  
The entire contents of the ZIP file is downloaded as one file.
9. Copy the ZIP file to a location accessible to the Release 11.2 environment.

10. Repeat these steps for each application in **EssbaseCluster-N**.
11. Optionally, for Oracle Hyperion EPM Architect-based Essbase applications, if you want to manage your metadata in Oracle Data Relationship Management in Release 11.2, see [Exporting Essbase Metadata from Performance Management Architect](#).

## Exporting Essbase Metadata from Performance Management Architect

### Export Metadata

To export 11.1.2.4 Oracle Essbase application metadata:

1. Launch the EPMA File Generator Utility by selecting **Start, Oracle EPM Systems, Foundation Services, Performance Management Architect**, and then **Start File Generator**.

The file generator is installed with Oracle Hyperion EPM Architect by default to:

```
C:\Oracle\Middleware\EPMSys11R1\products\Foundation\BPMA  
\EPMAFileGenerator\bin
```

2. Click **From EPMA Application**.
3. Enter the following information:
  - User name and password for the EPMA administrator
  - URL for EPMA Web Server
  - Name of the EPMA application
  - EPMA import file
4. Click **Execute**.

### Convert Export Files

Convert the export file to an Oracle Data Relationship Management compatible import file. For information on converting the export file, go to [Oracle Support](#) and navigate to the white paper "How to Migrate Metadata from EPMA to DRM Application (Doc ID 2626317.1)". This white paper also contains a link to a conversion utility that you can use to convert your export file to a file that's compatible with Data Relationship Management.

For information on how to create imports for Data Relationship Management, see [Working with Imports](#).

## Preparing Planning Applications for Upgrading

The steps for preparing Oracle Hyperion Planning applications for upgrading depend on the application type:

- For Classic Planning applications, see [Preparing Classic Planning Applications for Upgrading](#).
- For Oracle Hyperion EPM Architect-based Planning applications, see [Preparing Performance Management Architect-Based Planning Applications for Upgrading](#).

In addition, make a note of the data source name for each application. You'll need it later in the upgrade process. (In Oracle Hyperion Enterprise Performance



Management Workspace, select **Navigate**, then **Administer**, and then **Planning Administration**. Then, click **Manage Data Source** .)

## Preparing Classic Planning Applications for Upgrading

To prepare Classic Oracle Hyperion Planning applications for upgrading, export applications using Oracle Hyperion Enterprise Performance Management System Lifecycle Management. See [Exporting Planning Applications Using Lifecycle Management](#).

## Exporting Planning Applications Using Lifecycle Management

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export Oracle Hyperion Planning applications (metadata, data, and other artifacts) from Release 11.1.2.4.xxx.

Before exporting, refresh the cube for the Planning Release 11.1.2.4 application. The cube refresh must be successful before continuing. See the *Oracle Hyperion Planning Administrator's Guide* for details on refreshing the cube.

To export Planning applications from Release 11.1.2.4.xxx:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. In the View pane, expand the **Application Groups** node, expand the application group that includes your Planning applications, and then select the application to export.
4. Click **Select All**.

 **Tip:**

For large applications, consider exporting Essbase Data separately from the metadata (all the other options).

5. Click **Export**.
6. In the **Export** dialog box, in **File System Folder**, enter a name for the artifacts to be exported, and then click **Export**.  
Specify a meaningful name, such as  
`planning_application_name_11.1.2.4`.  
Check the status column and wait for **Completed** status.
7. Expand the **File System** node in Shared Services Console, right-click the folder you created, and then select **Download**.  
The **Download** option is available only if the folder size is less than or equal to 2 GB. If the Planning ZIP file is larger than 2GB, use an alternate method to access the file. For example, use a method such as FTP to transfer the folder to a location accessible to the Release 11.2 environment. By default, the exported folder is stored in `EPM_ORACLE_INSTANCE\import_export`.
8. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.  
The entire contents of the ZIP file is downloaded as one file.

9. Copy the ZIP file to a location accessible to the Release 11.2 environment.
10. Repeat these steps for each application.

## Preparing Performance Management Architect-Based Planning Applications for Upgrading

To prepare Oracle Hyperion EPM Architect-based Oracle Hyperion Planning applications for upgrading:

1. Convert the applications to Classic applications. See [Converting Performance Management Architect-Based Planning Applications to Classic Planning Applications](#).
2. Export the applications using Oracle Hyperion Enterprise Performance Management System Lifecycle Management. See [Exporting Planning Applications Using Lifecycle Management](#).
3. Export Planning metadata from Performance Management Architect. See [Exporting Planning Metadata from Performance Management Architect](#).

## Converting Performance Management Architect-Based Planning Applications to Classic Planning Applications

To convert Oracle Hyperion EPM Architect-based Oracle Hyperion Planning Release 11.1.2.4 applications to Classic applications:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
2. In EPM Workspace, open the application to the Classic Dimension Manager: From the **Navigate** menu, select **Applications**, then **Planning**, and then select the application name.

Note that Performance Management Architect-based applications have only viewing properties available; you can't edit them. (To check this, select **Administration**, then **Manage**, and then **Dimensions**.)

3. Navigate to the **Application Properties Editor** by selecting **Administration**, then **Application**, and then **Properties**, add the following property, and then click **Save**.
  - Property Name: **EDIT\_DIM\_ENABLED**
  - Property Value: **true**

If the property is already present, change the value to **true**.

4. Restart the Planning server.

### Note:

To validate that the application is now a classic application, in EPM Workspace, in the View pane, expand the **Application Groups** node, expand the application group that includes your Planning applications, and then select the application. In the right pane, expand **Configuration**, then **Properties**, and then make sure there is a property called **Application Definition**.

## Exporting Planning Applications Using Lifecycle Management

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export Oracle Hyperion Planning applications (metadata, data, and other artifacts) from Release 11.1.2.4.xxx.

Before exporting, refresh the cube for the Planning Release 11.1.2.4 application. The cube refresh must be successful before continuing. See the *Oracle Hyperion Planning Administrator's Guide* for details on refreshing the cube.

To export Planning applications from Release 11.1.2.4.xxx:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. In the View pane, expand the **Application Groups** node, expand the application group that includes your Planning applications, and then select the application to export.
4. Click **Select All**.

 **Tip:**

For large applications, consider exporting Essbase Data separately from the metadata (all the other options).

5. Click **Export**.
6. In the **Export** dialog box, in **File System Folder**, enter a name for the artifacts to be exported, and then click **Export**.  
Specify a meaningful name, such as  
`planning_application_name_11.1.2.4`.  
Check the status column and wait for **Completed** status.
7. Expand the **File System** node in Shared Services Console, right-click the folder you created, and then select **Download**.  
The **Download** option is available only if the folder size is less than or equal to 2 GB. If the Planning ZIP file is larger than 2GB, use an alternate method to access the file. For example, use a method such as FTP to transfer the folder to a location accessible to the Release 11.2 environment. By default, the exported folder is stored in `EPM_ORACLE_INSTANCE\import_export`.
8. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.  
The entire contents of the ZIP file is downloaded as one file.
9. Copy the ZIP file to a location accessible to the Release 11.2 environment.
10. Repeat these steps for each application.

## Exporting Planning Metadata from Performance Management Architect

### Export Metadata

To export 11.1.2.4 Oracle Hyperion Planning application metadata:

1. Launch the EPMA File Generator Utility by selecting **Start, Oracle EPM Systems, Foundation Services, Performance Management Architect**, and then **Start File Generator**.

The file generator is installed with Oracle Hyperion EPM Architect by default to:

```
C:\Oracle\Middleware\EPMSys11R1\products\Foundation\BPMA  
\EPMAFileGenerator\bin
```

2. Click **From Planning Application**.
3. Enter the following information:
  - User name and password for the EPMA administrator
  - URL for EPMA Web Server
  - Name of the EPMA application
  - EPMA import file
4. Click **Execute**.

#### Convert Export File

Convert the export file to an Oracle Data Relationship Management compatible import file. For information on converting the export file, go to [Oracle Support](#) and navigate to the white paper "How to Migrate Metadata from EPMA to DRM Application (Doc ID 2626317.1)". This white paper also contains a link to a conversion utility that you can use to convert your export file to a file that's compatible with Data Relationship Management.

For information on how to create imports for Data Relationship Management, see [Working with Imports](#).

## Preparing Profitability and Cost Management Artifacts for Upgrading

#### Related Topics

- [Preparing Standard Profitability and Detailed Profitability Applications for Upgrading](#)
- [Preparing Management Ledger Applications for Upgrading](#)

## Preparing Standard Profitability and Detailed Profitability Applications for Upgrading

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export Standard Profitability and Detailed Profitability application artifacts from Release 11.1.2.4.xxx.

To export artifacts from Oracle Hyperion Profitability and Cost Management Release 11.1.2.4.xxx:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. In the View pane, expand the **Application Groups** node, expand the application group that includes your Profitability applications, and then select the application to export.

4. Click **Select All**.
5. Click **Export**.
6. In the **Export** dialog box, in **File System Folder**, enter a name for the artifacts to be exported, and then click **Export**.  
Specify a meaningful name, such as  
`profitability_application_name_11.1.2.4`.  
Check the status column and wait for **Completed** status.
7. Expand the **File System** node in Shared Services Console, right-click the folder you created, and then select **Download**.  
The **Download** option is available only if the folder size is less than or equal to 2 GB. If the Profitability ZIP file is larger than 2GB, use an alternate method to access the file. For example, use a method such as FTP to transfer the folder to a location accessible to the Release 11.2 environment. By default, the exported folder is stored in `EPM_ORACLE_INSTANCE\import_export`.
8. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.
9. Copy the ZIP file to a location accessible to the Release 11.2 environment.
10. Repeat these steps for each Profitability and Cost Management application.
11. After performing these steps, see [Exporting Profitability and Cost Management Standard and Detailed Application Metadata from Performance Management Architect](#).

## Exporting Profitability and Cost Management Standard and Detailed Application Metadata from Performance Management Architect

### Export Metadata

To export 11.1.2.4 Oracle Hyperion Profitability and Cost Management application metadata:

1. Launch the EPMA File Generator Utility by selecting **Start, Oracle EPM Systems, Foundation Services, Performance Management Architect**, and then **Start File Generator**.

The file generator is installed with Oracle Hyperion EPM Architect by default to:

```
C:\Oracle\Middleware\EPMSystem11R1\products\Foundation\BPMA  
\EPMAFileGenerator\bin
```

2. Click **From EPMA Application**.
3. Enter the following information:
  - User name and password for the EPMA administrator
  - URL for EPMA Web Server
  - Name of the EPMA application
  - EPMA import file
4. Click **Execute**.

### Convert Export Files

Convert the export file to an Oracle Data Relationship Management compatible import file. For information on converting the export file, go to [Oracle Support](#) and navigate to the white paper "How to Migrate Metadata from EPMA to DRM Application (Doc ID 2626317.1)". This white paper also contains a link to a conversion utility that you can use to convert your export file to a file that's compatible with Data Relationship Management.

For information on how to create imports for Data Relationship Management, see [Working with Imports](#).

## Preparing Management Ledger Applications for Upgrading

Use the Export Template option to export Management Ledger artifacts from Release 11.1.2.4.xxx.

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.1.2.4 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Profitability Applications**.
3. Select the application you want to upgrade, and from the **Actions** menu, select **Export Template**.
4. In **Export Template**, make the following selections and then click **OK**.
  - Enter an export file name. File names should not include special characters.
  - Select **Include Input Data**.
  - Select the POVs that you want to migrate.
5. Log in to the server hosting Oracle Hyperion Shared Services, look for the ZIP file in the LCM import export location (by default, `oracle\middleware\user_projects\epmsystem1\import_export`) and copy it to a location accessible to the Release 11.2 environment.

## Preparing Financial Management Applications for Upgrading

To upgrade Oracle Hyperion Financial Management, have your database administrator export the Financial Management database and restore it to the new database server or schema in the Release 11.2 environment.

To prepare applications from Financial Management Release 11.1.2.4.xxx:

1. Shut down Financial Management services, including the xfm process.
2. Locate the Financial Management Release 11.1.2.4.xxx database or schema.
3. Export the Financial Management database or schema. For Oracle Database, for example, you can export the schema using Oracle DataPump.
4. Optionally, for Oracle Hyperion EPM Architect-based Financial Management applications, if you want to manage your metadata in Oracle Data Relationship Management in Release 11.2, see [Exporting Financial Management Metadata from Performance Management Architect](#).

Then, after installing and configuring Release 11.2, you use the Application Upgrade Utility to upgrade the application. Details for this procedure are covered later in the upgrade process.

## Exporting Financial Management Metadata from Performance Management Architect

### Export Metadata

To export 11.1.2.4 Oracle Hyperion Financial Management application metadata:

1. Launch the EPMA File Generator Utility by selecting **Start, Oracle EPM Systems, Foundation Services, Performance Management Architect**, and then **Start File Generator**.

The file generator is installed with Oracle Hyperion EPM Architect by default to:

```
C:\Oracle\Middleware\EPMSys11R1\products\Foundation\BPMA  
\EPMAFileGenerator\bin
```

2. Click **From HFM Application**.
3. Enter the following information:
  - User name and password for the EPMA administrator
  - URL for EPMA Web Server
  - Name of the EPMA application
  - EPMA import file
4. Click **Execute**.

### Convert Export File

Convert the export file to an Oracle Data Relationship Management compatible import file. For information on converting the export file, go to [Oracle Support](#) and navigate to the white paper "How to Migrate Metadata from EPMA to DRM Application (Doc ID 2626317.1)". This white paper also contains a link to a conversion utility that you can use to convert your export file to a file that's compatible with Data Relationship Management.

For information on how to create imports for Data Relationship Management, see [Working with Imports](#).

## Preparing Tax Provision Applications for Upgrading

Oracle Hyperion Tax Provision schema and applications are upgraded with Oracle Hyperion Financial Management.

See [Preparing Financial Management Applications for Upgrading](#).

## Preparing Financial Reporting Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export the document repository or artifacts.

The steps vary slightly depending on whether you were working in Oracle Hyperion Financial Reporting Release 11.1.2.4.900 (Document Repository) or Oracle Hyperion Reporting and Analysis Release 11.1.2.4 and Release 11.1.2.4.700.

 **Note:**

Hyperion BI Plus is no longer available, and features such as Financial Reporting reports with Oracle Essbase as a data source are no longer supported. You can't migrate Release 11.1.2.4 reports that used Essbase as a data source to Release 11.2. In Release 11.2, Financial Reporting, which is now a component of Hyperion Financial Applications, continues to support connections to Oracle Hyperion Planning data sources using an Essbase connection, as well as Oracle Hyperion Profitability and Cost Management.

### Preparing the Financial Reporting Document Repository (Release 11.1.2.4.900)

Before you begin, delete objects that are no longer required.

To export the artifacts from the Document Repository:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. In the View pane, expand the **Application Groups** node and then select **Document Repository**.
4. Click **Select All**.
5. Click **Export**.
6. In the **Export** dialog box, enter the **File System Folder** where the artifacts will be exported, and then click **Export**.  
Specify a meaningful name, such as `financial_reporting_11.1.2.4`.  
Check the status column and wait for **Completed** status.
7. Expand the **File System** node in Shared Services Console, right-click the Financial Reporting folder, and then select **Download**.
8. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.  
The entire contents of the ZIP file is downloaded as one file.
9. Copy the ZIP file to a location accessible to the Release 11.2 environment.

### Preparing Reporting and Analysis Artifacts (Release 11.1.2.4 or Release 11.1.2.4.700)

Before you begin, delete objects that are no longer required.

To export the Reporting and Analysis artifacts:

1. Log in to EPM Workspace.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.



3. In the View pane, expand the **Application Groups** node, expand **Reporting and Analysis** and then select **Reporting and Analysis**.
4. Click **Select All**.
5. Click **Export**.
6. In the **Export** dialog box, enter the **File System Folder** where the artifacts will be exported, and then click **Export**.  
Specify a meaningful name, such as `financial_reporting_11.1.2.4`.  
Check the status column and wait for **Completed** status.
7. Expand the **File System** node in Shared Services Console, right-click the folder you created, and then select **Download**.
8. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.  
The entire contents of the ZIP file is downloaded as one file.
9. Copy the ZIP file to a location accessible to the Release 11.2 environment.

## Preparing Financial Close Management Artifacts for Upgrading

To upgrade Oracle Hyperion Financial Close Management, export the schema from Release 11.1.2.4\_253 and import it in the Release 11.2 environment (for Oracle Database), or copy the Release 11.1.2.4\_253 database to the Release 11.2 database server (for SQL Server). Perform these steps later in the upgrade process, after you install and configure Release 11.2.

## Preparing FDMEE Artifacts for Upgrading

To upgrade Oracle Hyperion Financial Data Quality Management, Enterprise Edition, export the artifacts and the schema from Release 11.1.2.4.xxx, and then import them into Release 11.2.

Note that exporting the schema must be performed after installing and configuring Release 11.2, because it requires a utility that is installed with Release 11.2. Procedures for this task are covered later in the upgrade process.

To export FDMEE artifacts from Release 11.1.2.4:

1. In Windows Explorer, delete any data and log files in the `outbox` and `outbox/logs` directories that you won't need in the Release 11.2 environment.
2. Using Windows Explorer, copy the entire Application Root Folder directory from the Release 11.1.2.4 environment to a location accessible to the Release 11.2 Environment.  
The Application Root Folder is the storage location for the inbox, outbox, and logs for each FDMEE application

 **Note:**

To find the Application Root Folder directory, in Oracle Hyperion Enterprise Performance Management Workspace, click **Navigate**, then **Administer**, and then **Data Management**. Click the **Setup** tab, and then click **System Settings**. Note the directory specified in **Application Root Folder**.

3. If you have multiple applications with different Application Root Folders, copy those folders as well.

## Preparing Calculation Manager Artifacts for Upgrading

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to export Oracle Hyperion Calculation Manager artifacts from Release 11.1.2.4.xxx.

To export artifacts from Calculation Manager Release 11.1.2.4.xxx:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. In the View pane, expand the **Application Groups** node, expand **Foundation**, and then click **Calculation Manager**.
4. Click **Select All**.
5. Click **Export**.
6. In the **Export** dialog box, in **File System Folder**, enter a name for the artifacts to be exported, and then click **Export**.  
Specify a meaningful name, such as `calculation_manager_11.1.2.4`.  
Check the status column and wait for **Completed** status.
7. Expand the **File System** node in Shared Services Console, right-click the folder you created, and then select **Download**.
8. In the **File Download** dialog box, click **Save** to save the application artifacts as a ZIP file.  
The entire contents of the ZIP file is downloaded as one file.
9. Copy the ZIP file to a location accessible to the Release 11.2 environment.

## Downloading and Preparing Files for Installation

Download files for Release 11.2 and extract the zip file contents. See [Downloading Files for Installation](#).

When you are done with this step, return to the [Upgrading Checklist](#).

## Installing EPM System Products for an Upgrade

Install Oracle Enterprise Performance Management System products to a new environment using EPM System Installer, as described in [Installing EPM System Products in a New Deployment](#).

Note the following about installing EPM System products in an upgrade:

- You must install Release 11.2 on a new machine.
- For each machine, install all the products that you plan to host on that machine at one time. For additional requirements for a distributed installation, see [Installing EPM System Products in a Distributed Environment](#).

When you are done with this step, return to the [Upgrading Checklist](#).

## Restoring the Financial Management Schema

Before configuring Oracle Hyperion Financial Management, restore the schema or database that you exported from Release 11.1.2.4.xxx to the schema or database that you created for use with Release 11.2. See your database documentation for details.

When you are done with this step, return to the [Upgrading Checklist](#).

## Configuring EPM System Products for an Upgrade

After you install, use EPM System Configurator to configure Oracle Enterprise Performance Management System products. Note the following special requirements to consider during configuration.

### Configuring Financial Management

Before configuring Oracle Hyperion Financial Management, ensure that you've restored the schema or database that you exported from Release 11.1.2.4.xxx to the schema or database that you created for use with Release 11.2.

During Financial Management configuration, note the following:

- Select all Financial Management configuration options.
- During Financial Management database configuration, specify the database that you restored for use in the Release 11.2 environment and then select **Reuse the existing database**.

When you are done with this step, return to the [Upgrading Checklist](#).

## Starting EPM System Services

Start Oracle Enterprise Performance Management System services before you proceed. See [Starting and Stopping EPM System Products](#).

When you are done with this step, return to the [Upgrading Checklist](#).

## Validating the Installation

Use Oracle Hyperion Enterprise Performance Management System Diagnostics to validate the installation. See [Validating the Installation and Verifying Deployment](#).

For Oracle Hyperion Financial Close Management, use the Financial Close Management Validation Tool. See [Validating a Financial Close Management Deployment](#).

When you are done with this step, return to the [Upgrading Checklist](#).

## Importing Artifacts and Data for Release 11.2

Use the steps in the following sections to import artifacts and data that you exported from Release 11.1.2.4.

Note the required sequence:

1. Users and groups.
2. Applications and data.
3. Oracle Hyperion Calculation Manager artifacts.
4. Provisioning information and taskflows.

Most products use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to import artifacts and data to the Release 11.2 environment. To prepare for using Lifecycle Management to import artifacts and data:

- For LCM files that were too large to download in Release 11.1.2.4, use a method such as FTP to transfer the files to the Lifecycle Management Release 11.2 **LCM Export Import Location** that you defined during configuration.
- Specify migration options in the Release 11.2 environment. See "Setting Migration Options" in [Oracle® Enterprise Performance Management System Lifecycle Management Guide](#).

For details about using Lifecycle Management, see [Oracle® Enterprise Performance Management System Lifecycle Management Guide](#)

## Importing Foundation Services Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to import users and groups from Oracle Hyperion Foundation Services Release 11.1.2.4.xxx to Release 11.2.

To import Foundation Services users and groups to Release 11.2:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.2 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. Expand the **File System** node.
4. Right-click the **File System** node, select **Upload**, and then navigate to the location of the Foundation Services users and groups ZIP file.

5. In **File System**, right-click the uploaded file and select **Import**.
6. Click **OK** when you are prompted to proceed with the import.

After importing artifacts, review the Migration Status Report to validate the import.

You import provisioning information and taskflows later in the upgrade process, after you've imported applications from Release 11.1.2.4.

## Importing Essbase Applications

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to import Oracle Essbase applications from Release 11.1.2.4.xxx to Release 11.2.


To import Essbase applications to Release 11.2:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.2 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. Expand the **File System** node.
4. Right-click the **File System** node, select **Upload**, and then navigate to the location of the Essbase ZIP file.  
Skip this step for large files that you copied using another method.
5. In **File System**, right-click the uploaded file and select **Import**.
6. Click **OK** when you are prompted to proceed with the import.
7. After importing artifacts, review the Migration Status Report to validate the import.
8. Repeat these steps for each application.

## Importing Planning Applications

Set up a new data source, and then use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to import Oracle Hyperion Planning applications (metadata, data, and other artifacts) from Release 11.1.2.4.xxx to Release 11.2.

To import Planning applications to Release 11.2:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.2 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Planning Administration**.
3. Click **Manage Data Source**.
4. Click **Create Data Source** , enter the data source name, description, and data source information for the application database and the Oracle Essbase Server, and then click **Save**. The data source name must match the data source name in the Release 11.1.2.4 application.

**Tip:**

Click **Validate** under **Application Database** to validate the database connection. Click **Validate** under **Essbase Server** to validate the Essbase Server connection.

5. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
6. Expand the **File System** node.
7. Right-click **File System**, select **Upload**, and then navigate to the location of the LCM export file that you exported from the Planning Release 11.1.2.4 application. Skip this step for large files that you copied using another method.
8. In **File System**, expand the uploaded file, select the application, click **Select All**, select the application to import to, and then click **Import**. The application is created if it doesn't exist.  
If you get any errors related to application security:
  - a. Import provisioning. See [Importing Provisioning and Taskflows](#).
  - b. Re-import application security using Lifecycle Management.
9. After importing artifacts, review the Migration Status Report to validate the import.
10. Repeat these steps for each application.

## Importing Profitability and Cost Management Artifacts



### Related Topics

- [Importing Standard Profitability and Detailed Profitability Applications](#)
- [Importing Management Ledger Applications](#)

## Importing Standard Profitability and Detailed Profitability Applications

Use this method to import Oracle Hyperion Profitability and Cost Management artifacts from Release 11.1.2.4 to Release 11.2 for Standard Profitability and Detailed Profitability applications.

1. Create a new, empty Profitability and Cost Management application.
  - a. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.2 environment.
  - b. From the **Navigate** menu, select **Administer**, and then select **Profitability Applications**.
  - c. Create a new application (from the **Actions** menu, select **New**) with these attributes, and then click **Next**.
    - **Application Name**—use the same name you used in Release 11.1.2.4
    - **Essbase Application Server**—select the Essbase cluster to connect to
    - **Shared Services Project**— Default Application Group
    - **Application Type**—Standard Profitability or Detailed Profitability
    - **Dimension Source**—Native

- d. Enter the dimension names from the Release 11.1.2.4 application for these attributes, and then click **Finish**.
  - **Measure Dimension Name**
  - **Allocation Type Dimension Name** (Standard only)
2. Export metadata from Oracle Data Relationship Management and import it to Profitability and Cost Management. See [Exporting from Data Relationship Management and Importing to EPM Applications](#).  
 When importing the dimension metadata into Profitability and Cost Management, update dimensions one at a time, using the dimension flat files that you exported from Data Relationship Management. Perform this step for all dimensions except for the **Measures** dimension and the **Allocation Type** dimension (Standard only).  
**Measures** and **AllocType** are system dimensions that are auto populated with members when you create the application.  
 Note that for Standard applications, if you have created user-defined members in the **Measures** dimension, you should also import the **Measures** dimension.
  - a. From the **Actions** menu, select **Update Dimensions**.
  - b. Browse to select the file that contains the dimension members to import, and then click **OK**.
3. Validate and enable the application.
  - a. From the **Actions** menu, click **Validate and Enable**.
  - b. Click the **Job Library**  tab and validate that the **Validate and Enable** job completed successfully.
  - c. Click the **Applications**  tab and confirm that the application has a green check mark in the **Enabled** column.
4. Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to import the Profitability and Cost Management artifacts from Release 11.1.2.4.xxx to Release 11.2:
  - a. Log in to EPM Workspace in the Release 11.2 environment.
  - b. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
  - c. Expand the **File System** node.
  - d. Right-click the **File System** node, select **Upload**, and then navigate to the location of the LCM export file that you exported from the Profitability and Cost Management Release 11.1.2.4 application. For large files that you copied using FTP,
  - e. In **File System**, select the uploaded file to expand it, click **Select All**, and then click **Import**.
  - f. Click **OK** when you are prompted to proceed with the import.
5. Deploy the Profitability and Cost Management dimensions to Oracle Essbase. See *Oracle Hyperion Profitability and Cost Management Administrator's Guide*.
6. Load input data. See *Oracle Hyperion Profitability and Cost Management Administrator's Guide*.

7. Repeat these steps for each application.

## Importing Management Ledger Applications

Use this method to import Oracle Hyperion Profitability and Cost Management artifacts from Release 11.1.2.4 to Release 11.2 for Management Ledger applications.

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.2 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Profitability Applications**.
3. From the **Actions** menu, select **Import Template**, navigate to the template that you exported from Release 11.1.2.4, and then click **Next**.
4. Enter an application name, and then click **Finish**.
5. Check the **Job Library** to confirm that the **Import Template** job finished successfully.
6. From the **Applications** vertical tab, confirm that the application is there (you might need to refresh) and that it is marked as **Enabled**.

The **Import Template** action creates the application, imports the dimension metadata, imports the application artifacts, creates the Oracle Essbase cube and deploys the metadata to it, and imports the data.

## Upgrading Financial Management Applications

Use the Oracle Hyperion Financial Management Application Upgrade Utility to upgrade Financial Management applications.

To upgrade Financial Management applications:

1. From a command prompt, run `EPM_ORACLE_HOME\products\FinancialManagement\Server\HFM Application Upgrade_x64.exe`.
2. In the Financial Management Application Upgrade Utility, click **Connect**.
3. Enter the database connection properties and then click **OK**.
4. Enter the user name and password for the Financial Management user and then click **OK**.
5. Click **Upgrade** and then click **Yes** to continue.
6. When the upgrade is complete, the utility will report if there are any errors. Click **View Log** to view the upgrade log.
7. Log in to Oracle Hyperion Enterprise Performance Management Workspace.
8. From the **Navigate** menu, select **Administer**, and then select **Consolidation Administration**.



### Tip:

If you don't see **Consolidation Administration**, re-run EPM System Configurator and select the **Configure Web Server** task.



9. In the View pane, click **Applications**, right-click the upgraded application, enter application details, and then click **Register**.

## Upgrading Tax Provision Applications

Oracle Hyperion Tax Provision schema and applications are upgraded as part of Oracle Hyperion Financial Management schema and applications. See [Upgrading Financial Management Applications](#).

## Importing Financial Reporting Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to import the Oracle Hyperion Financial Reporting Document Repository (Release 11.1.2.4.900) or Oracle Hyperion Reporting and Analysis artifacts (Release 11.1.2.4 and Release 11.1.2.4.700).

The steps vary slightly depending on whether you were working in Financial Reporting Document Repository (Release 11.1.2.4.900) or Reporting and Analysis (Release 11.1.2.4 and Release 11.1.2.4.700).

### Importing the Financial Reporting Document Repository (Release 11.1.2.4.900)

Use Lifecycle Management to import the document repository from Financial Reporting Release 11.1.2.4.900 to Release 11.2.

To import the document repository to Release 11.2:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.2 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. Expand the **File System** node.
4. Right-click the **File System** node, select **Upload**, and then navigate to the location of the LCM export file that you exported from Financial Reporting Release 11.1.2.4.
5. In **File System**, expand the uploaded file, click **DOCREP**, then **Select All**, and then click **Import**.
6. Click **OK** when you are prompted to proceed with the import.

### Importing Reporting and Analysis Artifacts (Release 11.1.2.4 or Release 11.1.2.4.700)

Use Lifecycle Management to import the Reporting and Analysis artifacts from Release 11.1.2.4.900 to Release 11.2.

To import the Reporting and Analysis artifacts to Release 11.2:

1. Log in to EPM Workspace in the Release 11.2 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. Expand the **File System** node.

4. Right-click the **File System** node, select **Upload**, and then navigate to the location of the LCM export file that you exported from Reporting and Analysis Release 11.1.2.4.
5. In **File System**, expand the uploaded file, select **RnA-Reporting and Analysis**, click **Select All**, and then click **Import**.
6. Click **OK** when you are prompted to proceed with the import. Wait for **Completed** status.
7. Click the **Explore** tab.
8. From the **Tools** menu, select **Database Connection Manager**.
9. Select the database connection to edit, click **Edit**, click the database connection to edit, enter the database connection details, and then click **OK**. Repeat to update all database connections.

## Migrating Financial Close Management Artifacts

Have your database administrator perform these tasks.

### Perform these tasks in the Release 11.1.2.4\_253 environment:

1. Shut down all Oracle Enterprise Performance Management System services.
2. Export or copy the Release 11.1.2.4\_253 database schema.
  - For Oracle Database, export the Release 11.1.2.4\_253 database schemas for Oracle Hyperion Financial Close Management using Oracle Data Pump. For example:

```
expdp <user>/<password> DIRECTORY=data_pump_dir dumpfile=<user.dmp>  
logfile=exp_user.log
```
  - For SQL Server, see [Copying the Financial Close Management Schema \(SQL Server\)](#).
3. For Oracle Database, copy the schemas to a location accessible to the Release 11.2 environment.
4. Restart EPM System services.

Note that task flows are exported with the Oracle Hyperion Foundation Services artifacts.

### Perform these tasks in the Release 11.2 environment.

1. For Oracle Database: Import the source database you exported from Release 11.1.2.4\_253 to the Release 11.2 schema using Oracle Data Pump, using the REMAP command to import to a different schema. For example:

```
impdp <user>/<password> DIRECTORY=data_pump_dir  
dumpfile=<DatabaseDumpFile.dmp> logfile=import.log  
REMAP_SCHEMA=<user>:<user1>
```

2. Stop EPM System services.
3. Run EPM System Configurator again and select the **Configure Database** and **Deploy to Application Server** tasks for Financial Close Management. If you are

using Oracle Hyperion Tax Governance, also select the **Configure Database** and **Deploy to Application Server** tasks for **Tax Management**.

During database configuration, enter details for the Release 11.2 database using database credentials for Financial Close Management, and when prompted, select **Reuse the existing database**. (You are prompted for each product you are configuring.)

On the **Deploy to Application Server** page, select **FinancialClose**, **AccountReconciliation**, and **SDM**. If you are using Tax Governance, select **TaxOperation** and **TSS**. If you are using Tax Provision, select **TaxProvisioning**.

4. Import WebLogic users from the Release 11.1.2.4\_253 environment to the Release 11.2 environment.
5. Restart all EPM System servers and run Oracle Hyperion Enterprise Performance Management System Diagnostics.

## Copying the Financial Close Management Schema (SQL Server)

Perform the following steps on the Release 11.2 SQL Server environment to make a copy of the Oracle Hyperion Financial Close Management Release 11.1.2.4\_253 schema on the Release 11.2 database environment..

1. Launch SQL Server Management Studio.
2. Right-click the Financial Close Management source database and select **Tasks** and then select **Copy Database**.  
  
Create a SQL Server connection to the source database if it's not already created in SQL Server Management Studio.
3. In the **Copy Database Wizard**, click **Next** on the Welcome screen.
4. In **Select a Source Server**, for **Source Server**, enter the name of the source database server, use SQL Server Authentication, enter your sysadmin user name and password, and then click **Next**.
5. In **Select a Destination Server**, for **Destination Server**, enter the name of the destination database server, use SQL Server Authentication, enter your sysadmin user name and password, and then click **Next**.
6. In **Select the Transfer Method**, select **Use the SQL Management Object method** and then click **Next**.
7. In **Select Database**, select the Financial Close Management source database and then click **Next**.
8. In **Configure Destination Database**, enter a name for the destination database, such as `fc_m_target`, and then click **Next**.
9. In **Select Server Objects**, keep the default selections and then click **Next**.
10. In **Configure the Package**, enter a name, such as `fc_m_source_to_fc_m_target`, and then click **Next**.
11. In **Schedule the Package**, click **Next** to run immediately.
12. Click **Finish** to run the wizard.  
When the wizard completes, there is a copy of the source database with the name you provided, such as `fc_m_target`, on the destination database server.

13. Shut down Oracle Enterprise Performance Management System servers and then execute the following database change in `fcm_target`:

```
DELETE FROM PS_TXN
```

14. Restart EPM System servers.

## Importing FDMEE Artifacts

Have your database administrator perform these tasks.

To upgrade Oracle Hyperion Financial Data Quality Management, Enterprise Edition, import the schema and artifacts from Release 11.1.2.4.xxx to Release 11.2.

FDMEE Release 11.2 includes utilities, `aif_export.par` (Oracle Database) and `aif_migrate.dtsx` (SQL Server) to export or migrate data from Release 11.1.2.4. The instructions for this step are included in this topic because you must perform the steps after you install and configure Release 11.2.

## Preparing the Data Export/Import and Migration Utilities

When you installed Oracle Hyperion Financial Data Quality Management, Enterprise Edition Release 11.2, utilities were installed in `\Oracle\Middleware\EPMSysstem11R1\products\FinancialDataQuality\database\migrate\Oracle` (for Oracle database) and `\Oracle\Middleware\EPMSysstem11R1\products\FinancialDataQuality\database\migrate\SQLServer` (for SQL Server).

To prepare the utilities, in the Release 11.2 environment, copy files:

- For Oracle Database:
  1. Copy `aif_export.par` from the Release 11.2 environment to a location accessible to the Oracle Data Pump location on the database server in the Release 11.1.2.4 environment.
  2. Copy `aif_import.par` to a location accessible to the Oracle Data Pump location on the database server in the Release 11.2 environment.
- For SQL Server, copy `aif_migrate.dtsx` to the server where SQL Server Management Studio is installed.
- For both Oracle Database and SQL Server, copy `aif_post_import_updates.sql` to your Release 11.2 database environment.

## Migrating the FDMEE Schema (Oracle Database)

### Exporting the FDMEE Schema from Release 11.1.2.4 (Oracle Database)

Oracle Hyperion Financial Data Quality Management, Enterprise Edition Release 11.2 includes a utility `—aif_export.par—` to export data from the Release 11.1.2.4 environment.

To export the FDMEE schema from Release 11.1.2.4:

1. In the Release 11.1.2.4 environment, execute the Data Pump command from the Oracle Data Pump location on the database server to export the data. For example:

```
expdp parfile=<DIR PATH>/aif_export.par
```

Enter user credentials for the FDMEE schema.

Export produces the export data file in the default Data Pump output directory (\Oracle\admin\orcl\dpdump). The export filename is aif\_objects.dmp.

2. Copy aif\_objects.dmp to a location accessible to the Oracle Data Pump location on the database server in the Release 11.2 environment.

See the *Oracle Database Utilities* guide on the [Oracle Help Center](#) to familiarize yourself with the Oracle Data Pump Utility.

### Importing the FDMEE Schema to Release 11.2 (Oracle Database)

FDMEE Release 11.2 includes a utility—`aif_import.par`—to import metadata and data from the `aif_objects.dmp` file that you exported from Release 11.1.2.4. Use Oracle Data Pump to import the Release 11.1.2.4 schema into the Release 11.2 schema.

To import the FDMEE schema to Release 11.2:

1. Execute the following command from the Oracle Data Pump location on the Release 11.2 database server to import the data:

```
impdp remap_schema=<SOURCE SCHEMA NAME>:<TARGET SCHEMA NAME>  
parfile=aif_import.par
```

where `<SOURCE SCHEMA NAME>` is the name of the Release 11.1.2.4 schema.

where `<TARGET SCHEMA NAME>` is the name of the Release 11.2 schema.

`aif_import.par` imports the metadata and data from `aif_objects.dmp` to the new schema.

You can ignore "ORA-31684: Object type INDEX XXXX already exists" error.

2. After the import process is complete, execute the following SQL in the Release 11.2 database server environment to complete the database configuration. Log in as the user who owns the FDMEE tables for release 11.2:

```
aif_post_import_updates.sql
```

## Migrating the FDMEE Schema (SQL Server)

The data migration process for Oracle Hyperion Financial Data Quality Management, Enterprise Edition uses SQL Server Integration Services (SSIS) to perform the migration. Review SQL Server documentation and familiarize yourself with the SSIS package.

This procedure requires a network connection between the Release 11.1.2.4.xxx environment and the Release 11.2 environment.

To migrate the FDMEE Schema (SQL Server):

1. Stop the FDMEE service.
2. Update the SSIS package with connection information, and then save the file:
  - a. Open `aif_migrate.dtsx` using a text editor.
  - b. Edit line numbers 27 and 31 to specify the database connection string for the destination database (the FDMEE Release 11.2 database):
    - **Data Source**—Specify the `serverName:port`. If you encounter connection errors, try entering `serverName` only, without the port.
    - **User ID**—Specify the SQL Server user used to configure the FDMEE Release 11.2 database.
    - **Initial Catalog**—Specify the name of the database used to configure FDMEE Release 11.2.
    - **desstination\_password**—Specify the password (case-sensitive) in line number 31, by replacing **password** with the destination database password.
  - c. Edit line numbers 42 and 46 to specify the database connection string for the source database (the FDMEE Release 11.1.2.4 database):
    - **Data Source**—Specify the `serverName:port`.
    - **User ID**—Specify the SQL Server user used to configure the FDMEE Release 11.1.2.4 database.
    - **Initial Catalog**—Specify the name of the database used to configure FDMEE Release 11.1.2.4.
    - **source\_password**—Specify the password (case-sensitive) in line number 46, by replacing **password** with the source database password.
3. Execute the SSIS Data Migration Package.
 

The default location is `C:\Program Files (x86)\Microsoft SQL Server Management Studio 18\Common7\IDE\CommonExtensions\Microsoft\SSIS\150\Binn`

  - a. Launch `DTEExecUI.exe`.
  - b. For **Package source**, select **File System**. For **Package**, browse to and select `aif_migrate.dtsx`.
  - c. Click **Execute**.
  - d. Review the Package Execution Process to ensure that there are no errors.
4. After the import process is complete, execute the following SQL in the Release 11.2 database server environment to complete the database configuration. Log in as the user who owns the FDMEE tables for release 11.2

```
aif_post_import_updates.sql
```

To execute the query, open SQL Server Management Studio, right-click the FDMEE 11.2 database, select **New Query**, copy the contents of `aif_post_import_updates.sql`, and then click **Execute**.

5. Check for any errors. Fix any issues in the source and repeat steps 3 and 4 in sequence as needed.
 

You can ignore errors related to dropping tables with the suffix `_UPG` in the name.

## Importing FDMEE Artifacts to Release 11.2

To import Oracle Hyperion Financial Data Quality Management, Enterprise Edition artifacts to Release 11.2:

1. Update the Application Root Folder Settings: In Oracle Hyperion Enterprise Performance Management Workspace, click **Navigate**, then **Administer**, and then **Data Management**. Click the **Setup** tab, and then click **System Settings**. Update the directory specified in **Application Root Folder** to indicate the location for Release 11.2.
2. Copy the data that you exported from Release 11.1.2.4 to the new Application Root Folder directory in Release 11.2.
3. If you have multiple applications with different Application Root Folders, copy those folders as well.

## Additional Manual Steps for FDMEE

1. If you are importing data from a flat file, create the FDMEE folder using System Settings and copy the `FlatFile.txt` used for import.
2. Point the ODI settings to the new source server settings.

See FDMEE Application Folder Architecture and Setting System-Level Profiles in *Oracle Hyperion Financial Data Quality Management Administrator's Guide* for details.

## Importing Calculation Manager Artifacts

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to import Oracle Hyperion Calculation Manager artifacts from Release 11.1.2.4.xxx to Release 11.2.

To import Calculation Manager artifacts to Release 11.2:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.2 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. Expand the **File System** node.
4. Right-click the **File System** node, select **Upload**, and then navigate to the location of the Calculation Manager ZIP file.
5. In **File System**, right-click the uploaded file, click **CALC \_ Calculation Manager**, click **Select All**, and then click **Import**.
6. Click **OK** when you are prompted to proceed with the import.
7. After importing artifacts, review the Migration Status Report to validate the import.

## Importing Provisioning and Taskflows

After you've imported applications from Release 11.1.2.4, import provisioning information and taskflows.

Use Oracle Hyperion Enterprise Performance Management System Lifecycle Management to import provisioning information and taskflows from Oracle Hyperion Foundation Services Release 11.1.2.4.xxx to Release 11.2.

To import provisioning information and taskflows to Release 11.2:

1. Log in to Oracle Hyperion Enterprise Performance Management Workspace in the Release 11.2 environment.
2. From the **Navigate** menu, select **Administer**, and then select **Shared Services Console**.
3. Expand the **File System** node.
4. Right-click the **File System** node, select **Upload**, and then navigate to the location of the Foundation Services provisioning information and taskflows ZIP file.
5. In **File System**, right-click the uploaded file and select **Import**.
6. Click **OK** when you are prompted to proceed with the import.

After importing provisioning, review the following to validate the import:

- Check user provisioning. Expand **User Directories**, then **Native Directory**, select **Users**, then **Shared Services**, then **Provisioning**, and then **Users**.
- Check group provisioning. Expand **User Directories**, then **Native Directory**, and then select **Groups**. Right-click a group, select **Provision**, and review the provisioning.

If you are using an external authentication provider, repeat these steps, this time importing the assigned roles for your provider.

## Importing Performance Management Architect Application Metadata into Data Relationship Management

You'll create a Oracle Data Relationship Management application and use the Data Relationship Management Metadata Migration Utility to load your metadata to the Data Relationship Management application where you can manage it. You must first export your metadata from Oracle Hyperion EPM Architect using the EPMA File Generator Utility and convert that file to an XML file that can be used to import the metadata to the Data Relationship Management application.

In Data Relationship Management, follow these steps to import your Performance Management Architect application metadata:



Step	Task	Refer to this documentation
1.	<ol style="list-style-type: none"> <li>1. Create a Data Relationship Management application to load the import file to.</li> <li>2. Use the Data Relationship Management Metadata Migration Utility to load the appropriate application template, such as the Planning App Template, for the ADS type you exported using the EPMA File Generator Utility. By default, application templates are installed to:  C:\Oracle\Middleware\EPMSys11R1\products\DataRelationshipManagement\server\apptemplates</li> <li>3. Modify the Data Relationship Management configuration as necessary to align available properties in the file with the Import specification created by the application template.  Create additional properties in Data Relationship Management as needed for your implementation.</li> </ol>	<ul style="list-style-type: none"> <li>• Creating an Application</li> <li>• Migrating Data Relationship Management Metadata - Follow the instructions in "Loading Metadata"</li> <li>• Managing Property Definitions</li> </ul>
2.	Import the converted file into your Data Relationship Management application.	Working with Imports
3.	Manage your metadata.	Getting Started

## Exporting from Data Relationship Management and Importing to EPM Applications

Follow these steps to export your application metadata from Oracle Data Relationship Management and import it into your EPM application.

Step	Task	Refer to this documentation
1.	<b>In Data Relationship Management:</b> Export the application metadata to a file using the export specification created by the application template.	Working with Exports

Step	Task	Refer to this documentation
2.	<b>In your EPM application:</b> Import the metadata to your application. For example, for Oracle Hyperion Planning, you can import it either interactively by dimension or via batch using the Outline Load Utility.	<ul style="list-style-type: none"> <li>• For Planning, Importing and Exporting Data and Metadata</li> <li>• For Oracle Hyperion Financial Management, Managing Applications</li> <li>• For Oracle Hyperion Profitability and Cost Management, Importing Data into Profitability and Cost Management</li> <li>• For Oracle Essbase, <a href="#">Loading Data and Building Dimensions</a></li> </ul>

## Validating the Installation

Use Oracle Hyperion Enterprise Performance Management System Diagnostics to validate the installation. See [Validating the Installation and Verifying Deployment](#).

For Oracle Hyperion Financial Close Management, use the Financial Close Management Validation Tool. See [Validating a Financial Close Management Deployment](#).

When you are done with this step, return to the [Upgrading Checklist](#).

## Repeating the Upgrade Process for Applications

The upgrade process in this release is based on deploying a new software release and moving applications, data, and provisioning information from the earlier deployment to the new deployment. This approach allows the upgrade process to be repeatable. You can export artifacts from Oracle Enterprise Performance Management System Release 11.1.2.4.xxx and import them to your Release 11.2 test environment. After testing is completed, you can repeat the export and import steps to your Release 11.2 production environment to get the latest artifacts.

If you are managing metadata in Oracle Data Relationship Management, exporting data from Data Relationship Management and importing it to your EPM System applications is an iterative process and part of maintaining your applications.

## Upgrading EPM System Clients

Depending on the client, if you are upgrading from an earlier release of an Oracle Enterprise Performance Management System client component, you:

- Uninstall the earlier release before you install the new release.
- Install over the earlier release.

Consider installing the client on a different machine in a test environment until you are ready to uninstall or install over the earlier version.

You can upgrade Oracle Smart View for Office in one of several ways:

- Have users install Smart View from Oracle Hyperion Enterprise Performance Management Workspace: from the Tools menu, select **Install**, and then **Smart View**.
- Install Smart View on client machines using the Smart View installer.

Oracle recommends that you uninstall Smart View before installing the latest version.

For more information, see [Installing EPM System Clients](#).

# 8

## Applying an Update to EPM System Products

### Related Topics

- [About Applying an Update](#)
- [Supported Paths to EPM System Release 11.2.1](#)
- [Applying an Update Installation Checklist](#)
- [Downloading and Extracting Installation Files](#)
- [Applying an Update Prerequisite Tasks](#)
- [Installing EPM System Products Using Apply Update](#)

### About Applying an Update

If you are applying an update to move from Oracle Enterprise Performance Management System Release 11.2.0 to 11.2.1, use the procedures in this chapter.

Notes about applying an update:

- If you apply an update to move from an existing Release 11.2.0 installation to Release 11.2.1.0.000, you can't roll back to Release 11.2.0.
- When you apply an update, you must install to the same machine as the previous installation.
- You must log in as the same user that installed and configured the previous release.
- When you apply an update, all installed EPM System components are updated. There is no option to select components.
- Fusion Middleware components are not updated, so installation selections for WebLogic, ODI, Oracle HTTP Server, and Oracle Database clients are not available.

### Supported Paths to EPM System Release 11.2.1

You can move to Oracle Enterprise Performance Management System Release 11.2.1 from the following releases:

**Table 8-1 Supported Paths to Release 11.2.1**

Path From Release...	To Release 11.2.1
11.1.2.4.xxx	Upgrade directly from Release 11.1.2.4.xxx to Release 11.2.1. See <a href="#">Upgrading EPM System</a> .
11.2.0	Apply the update using the procedures in this chapter.

# Applying an Update Installation Checklist

**Table 8-2 Applying an update installation checklist**

Task	Reference
Download and extract the installation files.	<a href="#">Downloading and Extracting Installation Files</a>
Perform the <b>Apply Update</b> installation prerequisite tasks.	<a href="#">Applying an Update Prerequisite Tasks</a>
Install Oracle Enterprise Performance Management System products.	<a href="#">Installing EPM System Products Using Apply Update</a>
Configuration is not required when you apply an update.	
Validate the installation using EPM System Diagnostics and generate a deployment report.	<a href="#">Validating the Installation and Verifying Deployment</a>

## Downloading and Extracting Installation Files

Download the Oracle Enterprise Performance Management System Release 11.2.1 files from Oracle Software Delivery Cloud (<http://edelivery.oracle.com/>). Oracle recommends that you download files to a shared drive. See [Downloading Files for Installation](#) for details on downloading and extracting installation files.

Note that files are listed on Oracle Software Delivery Cloud as 11.2.0.0.0 (for example Oracle Enterprise Performance Management System - Part 1 11.2.0.0.0) but the downloaded ZIP files contain Release 11.2.1 files.

## Applying an Update Prerequisite Tasks

Before applying the update to move to Oracle Enterprise Performance Management System Release 11.2.1, stop services:

- EPM System Release 11.2.0 services
- Node Manager Windows Service and Oracle HTTP Server, if you are using Oracle HTTP Server as your web server
- WebLogic Administration Server

For information about stopping services, see [Starting and Stopping EPM System Products](#).

## Installing EPM System Products Using Apply Update

When you apply an update, install using the same user who was used to install the earlier release.

To apply the update to Oracle Enterprise Performance Management System products:

1. Launch EPM System Installer:

Double-click `installTool.cmd` in the root directory to which you extracted the EPM System Installer files.

2. In **Destination**, click **Next**. You can't change the destination. You must apply the update on top of your existing EPM System installation.
3. In **Installation Type**, **Apply Update** is selected for you; click **Next**.
4. Step through EPM System Installer. In **Product Selection**, click **Next**. You can't change the product selection.

You must apply the update to all EPM System products in the deployment. You can't apply the update to only some products.

5. When installation is complete, click **Finish**.
6. Repeat the installation steps on each machine in the deployment.
7. Start services:
  - WebLogic Administration Server
  - EPM System Release 11.2.1 services
  - Node Manager Windows Service
  - Oracle HTTP Server if you are using it as your web server

See [Starting and Stopping EPM System Products](#) for details

Configuration is not required when you apply an update.

# 9

## Performing Manual Configuration Tasks in a New Deployment

After configuration, you must configure user directories, provision the functional administrator, and deactivate the default administrator (admin) account. See *Oracle Enterprise Performance Management System User Security Administration Guide*.

To set up Oracle Enterprise Performance Management System components to work with Oracle Web Services Manager, see the *Oracle Enterprise Performance Management System Deployment Options Guide*.

See the *Oracle Enterprise Performance Management System Deployment Options Guide* for additional optional tasks you can perform to customize your deployment.

See your product's Administration Guide for additional tasks to perform.

## Financial Close Management and Tax Governance Manual Configuration Tasks

This section describes additional tasks required to configure Oracle Hyperion Financial Close Management and Oracle Hyperion Tax Governance. Perform these tasks after you install and configure Financial Close Management or Tax Governance.

### **Caution:**

You **must** perform these tasks before you can start and run Financial Close Management or Tax Governance. Perform the tasks in the order in which they are listed.

The following table describes Financial Close Management and Tax Governance manual configuration tasks.

### **Note:**

For the procedures that follow, note that if you selected Production Mode when you created the WebLogic domain, to make changes in the WebLogic Administration Console you must first click **Lock & Edit** in the Change Center. After you make the changes, click **Activate Changes** in the Change Center.

**Table 9-1 Financial Close Management and Tax Governance Manual Configuration Tasks**

Task	Reference
Configure the WebLogic Domain to connect to Oracle Internet Directory, Microsoft Active Directory (MSAD), or SunOne	<a href="#">Configuring the WebLogic Domain to OID, MSAD, SunOne</a>
Start managed servers in order.	<a href="#">Start Managed Servers</a>
If you are using Microsoft SQL Server, remove <code>EDNLocalTxDataSource</code> and <code>EDNDataSource</code> .	
Raise the maximum capacity of the connection pool.	<a href="#">Raising the Maximum Capacity in the Connection Pool</a>
Increase the connection pool of the external LDAP provider.	<a href="#">Increasing the Connection Pool of the External LDAP Provider</a>
Target shared libraries.	<a href="#">Targetting Shared Libraries</a>

After performing these steps you can also configure Account Reconciliation Manager to work with Oracle Hyperion Financial Data Quality Management, Enterprise Edition and create and manage Integration Types. See the *Oracle Hyperion Financial Close Management Administrator's Guide*. You can download integration `.xml` files from My Oracle Support.

## Start Managed Servers

Start each managed server in the following order:

- WebLogic Administration Server
- Hyperion Foundation Services Managed Server
- Oracle HTTP Server - See [Starting and Stopping Oracle HTTP Server](#)
- In any order:
  - Oracle Hyperion Financial Close Management Java web application, if you are using Financial Close Management
  - Oracle Hyperion Tax Governance Java web application, if you are using Tax Governance
  - Oracle Hyperion Financial Management Web Services Managed Server, if you are using Financial Management with Financial Close Management
  - Oracle Hyperion Financial Reporting Java web application, if you are using Financial Reporting with Financial Close Management
  - Oracle Hyperion Financial Data Quality Management, Enterprise Edition, if you are using Account Reconciliation Manager

## Raising the Maximum Capacity in the Connection Pool

If necessary, fine tune the data source to size the connection pool.

To raise the maximum capacity in the connection pool:



1. In the WebLogic Administration Console ([http://WebLogic\\_Admin\\_Host:WebLogic\\_Admin\\_Port/console](http://WebLogic_Admin_Host:WebLogic_Admin_Port/console)), select **Services**, then **JDBC**, and then **Datasources**.
2. Select your data source, then **Connection Pool**, and then **Maximum Capacity**.
3. Edit settings to increase capacity as follows:
  - financialclose\_datasource—150
  - financialclosecommon\_datasource—150

If resource errors specific to these data sources are logged, increase their capacity:

- EPMSystemRegistry
- supplementaldata\_datasource
- taxoperations\_datasource
- taxsupplementalschedules\_datasource

 **Note:**

You can increase the capacity for each data source by a different amount, depending on the needs for your installation.

If the Oracle Hyperion Financial Close Management or Oracle Hyperion Tax Governance log includes this error message: `java.sql.SQLException: Could not retrieve datasource via JNDI url 'jdbc/data source'`  
`weblogic.jdbc.extensions.PoolDisabledSQLException:`  
`weblogic.common.resourcepool.ResourceDisabledException: Pool data source is Suspended, cannot allocate resources to applications..]`, then you have exceeded the maximum connections allowed in the connection pool for the specified data source, and you need to increase the capacity of the connection pool.

## Increasing the Connection Pool of the External LDAP Provider

To increase the connection pool of external LDAP provider:

1. Shut down all servers (Admin with all managed server) if they are running.
2. Go to `domain_home\config\fmwconfig\ovd\default`.
3. Make a backup of `adapters.os_xml`.
4. Open `adapters.os_xml` and find `<ldap id="XYZ" version="0">`, where `XYZ` is the name of the external LDAP provider configured from WebLogic Administration Console.
5. Change `<maxPoolSize>` from 10 to 100 or 150. For example:

```
<pageSize>1000</pageSize>
<referrals>>false</referrals>
<heartBeatInterval>60</heartBeatInterval>
<timeout>120000</timeout>
<maxPoolSize>100</maxPoolSize>
```

```
<maxPoolWait>1000</maxPoolWait>
<maxPoolChecks>10</maxPoolChecks>
<quickFail>false</quickFail>
<escapeSlashes>true</escapeSlashes>
<kerberos>false</kerberos>
<useDNS>No</useDNS>
</ldap>
```

## Configuring the WebLogic Domain to OID, MSAD, SunOne

This procedure is required to configure the WebLogic domain, or in the case of Oracle Hyperion Financial Close Management or Oracle Hyperion Tax Governance, to communicate with an external provider, such as OID, MSAD, or SunOne. Oracle Hyperion Shared Services must also be configured to work with this external provider. Follow the sections specific to your provider.

### Note:

Financial Close Management and Tax Governance do not support Shared Services Native Directory. The Web Services features of Oracle Hyperion Profitability and Cost Management, Oracle Hyperion Provider Services, Oracle Hyperion Financial Data Quality Management, Enterprise Edition, and Oracle Hyperion Financial Management do not work with Shared Services Native Directory. See the *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide* for more information.

To connect OID, MSAD, or SunOne to the WebLogic Server:

1. Log in to the WebLogic Administration Console if you are not already logged in.
2. Click **Security Realms** on the left, click **myrealm**, and then click the **Providers** tab.
3. Click **Add**, enter the following details, and then click **OK**.

For OID:

- Name - **OID**
- Type - **OracleIntenetDirectoryAuthenticator**

For MSAD:

- Name - **MSAD**
- Type - **ActiveDirectoryAuthenticator**

For SunOne:

Name - **SunOne**

You can ignore the prompt to restart the server; you will be restarting at the end of this procedure.

4. Click the provider you just added, click the **Provider Specific** tab, enter the following details for your provider, and then click **Save**.
  - Host

- Port
- Principal
- Credential
- User Base DN
- Group Base DN
- User from Name Filter (MSAD only)
- User Name Attribute (MSAD only)

You can leave the rest of the default values unchanged.

5. Click **OID**, **MSAD**, or **SunOne**, and for **Control Flag**, select `SUFFICIENT`.
6. Restart WebLogic Server.

 **Note:**

When configuring the external provider in Shared Services, make the provider a trusted source to ensure that SSO works.

## Targetting Shared Libraries

To target shared libraries to the FinancialClose cluster:

1. Log in to the WebLogic Administration Console.
2. Click **Deployments**.
3. Click **epm-misc-libraries** and add **FinancialClose** cluster as its target.
4. Click **epm-aif-odi-libraries** and add **FinancialClose** cluster as its target.

# 10

## Starting and Stopping EPM System Products

This chapter describes how to start and stop Oracle Enterprise Performance Management System services and applications and provides default URLs for EPM System clients.

Startup order:

1. Start all databases used as repositories
2. Start WebLogic Administration Server. See [Starting and Stopping WebLogic Administration Server](#).
3. Start all EPM System services using a single start script. See [Starting and Stopping EPM System Using a Single Script](#).  
There is no required start order for EPM System services with the exception of Oracle Hyperion Financial Close Management.  
If you are using Financial Close Management, see the required service startup order in [Financial Close Management Application Server](#).
4. Start Node Manager and Oracle HTTP Server, if you are using Oracle HTTP Server as your web server. See [Starting and Stopping Oracle HTTP Server](#).

### Note:

If you selected **Run Windows Services as non-local system account** and specified a user name and password on the **Configure Common Settings** panel of EPM System Configurator, Windows services are started using the specified user name. If you do not specify a user name and password, EPM System Configurator creates Windows services using the local system account. Before you start the services, change them to use the appropriate domain account.

## Starting and Stopping WebLogic Administration Server

To start WebLogic Administration Server:

```
Launch <middleware_home>/user_projects/domains/EPMSystem/bin/  
startWeblogic.cmd.
```

To stop WebLogic Administration Server:

```
Launch <middleware_home>/user_projects/domains/EPMSystem/bin/  
stopWeblogic.cmd.
```

## Starting and Stopping EPM System Using a Single Script

Use a single script to start or stop all Oracle Enterprise Performance Management System services. EPM System Installer installs a single start script in `EPM_ORACLE_INSTANCE/bin`, called `start.bat`.

Running the single start script on a machine in your EPM System deployment starts all EPM System services installed on that machine. The single start script works by calling the individual start scripts for every product.

The user running the start script should be a member of the Administrators group.

To start EPM System services:

1. From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.
2. Run this start script on each machine in your environment.

After the single start script completes, you can run Oracle Hyperion Enterprise Performance Management System Diagnostics to determine which services on a machine are running. See [Validating the Installation and Verifying Deployment](#).

### Note:

To stop EPM System services: A single stop script is also installed in `EPM_ORACLE_INSTANCE/bin`, called `stop.bat`. Running the stop script on a machine in your EPM System deployment stops all EPM System products on that machine. To stop services, from the **Start** menu, select **Oracle EPM System**, and then **Stop EPM System**.

## Starting and Stopping Oracle HTTP Server

If you are using Oracle HTTP Server as your web server, start Node Manager and Oracle HTTP Server. Oracle HTTP Server is managed and monitored with Node Manager.

To start Node Manager and Oracle HTTP Server:

1. Start the Node Manager service from the Windows Services panel: **Oracle Weblogic ohs NodeManager (C\_Oracle\_MIDDLE-1\_ohs\_server)**
2. Start Oracle HTTP Server from the command line. From `EPM_ORACLE_INSTANCE\httpConfig\ohs\bin`, launch `startComponent ohs_component`.
3. Enter the WebLogic Admin Server password.

### Note:

Stop the Node Manager from the Windows Services panel: **Oracle Weblogic ohs NodeManager (C\_Oracle\_MIDDLE-1\_ohs\_server)**. Stop Oracle HTTP Server from the command line. From `EPM_ORACLE_INSTANCE\httpConfig\ohs\bin`, launch `stopComponent ohs_component`.

## Launching Clients

This section describes how to launch Oracle Enterprise Performance Management System clients. It lists default URLs and script names as appropriate. Most clients can also be started using the Windows Start menu.

The following table describes the URLs and scripts for launching EPM System clients.

To connect from a server or client to a Java web application, you must use the web server port (*machine\_name:web\_server\_port*) in the URL. For example, *machine\_name:19000* is the default for Oracle HTTP Server and *machine\_name:9000* is the default for the proxy server.


**Table 10-1** Launching Clients

Client	URL	Script or Other Launch Method
Oracle Hyperion Shared Services Console	<code>http://WebServer:Port/interop/</code>	From the <b>Start</b> menu, select <b>Oracle EPM System</b> , and then <b>Shared Services URL</b> .

 **Note:**

The Start menu item is available only on the machine on which you installed the web server.

Table 10-1 (Cont.) Launching Clients

Client	URL	Script or Other Launch Method
Oracle Hyperion Enterprise Performance Management Workspace	<code>http://WebServer:Port/workspace/</code>	From the <b>Start</b> menu, select <b>Oracle EPM System</b> , and then <b>Workspace URL</b> .
		<div style="border: 1px solid #0070C0; padding: 10px; background-color: #E6F2FF;"> <p> <b>Note:</b></p> <p>The Start menu item is available only on the machine on which you installed the web server.</p> </div>
Oracle Data Relationship Management Web Client	<code>http://drm_web_server_name/drm-web-client</code>	Select <b>Start</b> , then <b>Oracle EPM System</b> , then <b>Data Relationship Management</b> , and then <b>Web Client</b> .
Data Relationship Management Migration Utility	<code>http://drm_web_server_name/drm-migration-client</code>	Select <b>Start</b> , then <b>Oracle EPM System</b> , then <b>Data Relationship Management</b> , and then <b>Migration Utility</b> .
Data Relationship Management Batch Client	N/A	From a Windows command line prompt, run <code>EPM_ORACLE_HOME/products/DataRelationshipManagement/client/batch-client/drm-batch-client.exe</code>
Oracle Essbase Administration Services Console	<code>http://WebServer:port/easconsole/</code>	Select <b>Start</b> , then <b>Oracle EPM System</b> , then <b>Essbase</b> , then <b>Essbase Administration Services</b> , and then <b>Start Administration Services Console</b> .
Oracle Essbase Client	NA	Select <b>Start</b> , then <b>Oracle EPM System</b> , then <b>Essbase</b> , and then <b>Essbase Client</b> .
Oracle Smart View for Office	NA	Use the Smart View menu or Smart View ribbon in Microsoft Excel, Microsoft Word, or Microsoft PowerPoint.

# 11

## Validating the Installation and Verifying Deployment

### Related Topics

- [Validating the Installation](#)
- [Generating a Deployment Report](#)
- [Verifying Deployment](#)
- [Validating a Financial Close Management Deployment](#)

### Validating the Installation

Oracle Hyperion Enterprise Performance Management System Diagnostics tests the connectivity of installed and configured Oracle Enterprise Performance Management System components. Run EPM System Diagnostics on each machine in the deployment. The results of the tests are saved in HTML format.

You must install, configure, and run EPM System Diagnostics as the same user.

### Prerequisites

Before using Oracle Hyperion Enterprise Performance Management System Diagnostics, complete these prerequisites:

- Install Oracle Enterprise Performance Management System products. See [Installing EPM System Products in a New Deployment](#).
- Use EPM System Configurator to perform all configuration tasks required for each product. See [Configuring EPM System Products in a New Deployment](#).
- Perform manual configuration tasks.  
See [Performing Manual Configuration Tasks in a New Deployment](#).
- Start EPM System services.  
See [Starting and Stopping EPM System Products](#).

### Using EPM System Diagnostics

To run Oracle Hyperion Enterprise Performance Management System Diagnostics:

1. Choose a method:
  - (Windows) In `epm_oracle_instance/bin`, double-click `validate.bat`.
  - From the Start Menu, choose **Programs**, then **Oracle EPM System**, and then **EPM System Diagnostics**.

Progress is shown in the command window.



2. To view results, navigate to `epm_oracle_instance/diagnostics/reports` and open `instance_report_date_time.html`.
3. Look for failed tests, and diagnose and fix problems.

EPM System Diagnostics creates a ZIP file of all the logs in `/logsziips` for your convenience.

For more information about logs, see *Oracle Enterprise Performance Management System Installation and Configuration Troubleshooting Guide*.

4. Run EPM System Diagnostics again and view the report to verify that problems are solved.

 **Note:**

Clicking Refresh in the browser does not refresh the report output.

5. In a distributed environment, run EPM System Diagnostics on each machine in the deployment.

The report captures the following information:

- Test date and time
- Test Status: Passed or Failed for each test
- Service: Type of test for each test
- Test Description: A detailed description of each test
- Duration: Duration of each test
- Test start time
- Test end time
- Total test duration

## Diagnostics Performed

The following list highlights the Oracle Hyperion Enterprise Performance Management System Diagnostics tests performed for Oracle Enterprise Performance Management System products.

- CFG: Configuration - Checks whether all configuration tasks have been completed
- DB: Database - Checks connection to database `host:port;databaseName`
- EXT: External Authentication - Checks Native Directory external authentication provider configuration
- HTTP: http - Checks availability of HTTP context for all components configured for the web server.
- SSO:
  - Checks status of Oracle Hyperion Shared Services security (Native Directory as well as external directories)

- Checks availability of login to Shared Services, Taskflows, Audit, Shared Services Java web application, and Oracle Hyperion Enterprise Performance Management System Lifecycle Management
- WEB: Web application - Checks availability of Java web application on *host:port*
- Additional product-specific tests

## Generating a Deployment Report

After completing an Oracle Enterprise Performance Management System deployment, you can generate a deployment report that lists this information:

- EPM Deployment Topology Report
  - Logical Web Addresses — all logical Java web applications and all web servers that are configured
  - Application Tier Components — the components configured for each EPM Instance in this deployment, including the Java web application URL and domain name for each Java web application
  - Database Connections — all databases configured for EPM System products
  - User Directories — user directories used by EPM System products; configured security providers are listed in the same order as configured in Oracle Hyperion Shared Services
  - Data Directories — data directories used by EPM System products, indicating the directories that need to be on a shared file system
- EPM Deployment History Report — configuration history of activities on the specified date for each server in the deployment

This report can help you to resolve any issues that might arise in your deployment. For example, you can use the report to verify that there is only one WebLogic domain and that the deployment points to the correct number of database schemas. The deployment report is created from the Oracle Hyperion Shared Services Registry database. You can generate the report from any server in the deployment, and it does require EPM System services to be running.

The report has additional sections that show deployment history

To generate a deployment report:

1. Open a command line window and navigate to *EPM\_ORACLE\_INSTANCE/bin*.
2. Run the command `epmsys_registry.bat|.sh report deployment`.

By default, the report is saved as *EPM\_ORACLE\_INSTANCE/diagnostics/reports/deployment\_report\_YYYYMMDD\_HHMMSS.html*.

You can add an optional file name argument to the command to save the HTML report with a different file name or location. For example, this command saves the report as `c:/epm_setup/epm_deployment.html`:

```
epmsys_registry.bat|.sh report deployment c:/epm_setup/epm_deployment
```

# Verifying Deployment

## Related Topics

- [Verifying Shared Services Deployment](#)
- [Verifying EPM Workspace Deployment and Products in EPM Workspace](#)
- [Verifying Administration Services Deployment](#)
- [Verifying Provider Services Deployment](#)

## Verifying Shared Services Deployment

To verify deployment:

1. From the Start menu, select **Programs**, then **Oracle EPM System**, then instanceName, then **Foundation Services**, and then **Shared Services URL**. Or, using a web browser, open:

```
http://Hostname.Example.Com:WebServerListenPortinterop/
```

2. Log on to Oracle Hyperion Shared Services.
3. Review the output for the WebLogic managed server in `MIDDLEWARE_HOME/user_projects/domains/EPMSystem/servers/SERVER_NAME/logs`.
4. Review the product logs in `/diagnostics/logs`. You can also review the diagnostics reports in `/diagnostics/reports`.

## Verifying EPM Workspace Deployment and Products in EPM Workspace

To verify deployment:

1. From the Start menu, select **Programs**, then **Oracle EPM System**, then instanceName, then **Workspace**, and then **Workspace URL**. Or, using a web browser, open

```
http://Hostname.Example.Com:WebServerListenPortworkspace/
```

2. Review the output for your WebLogic managed server in `MIDDLEWARE_HOME/user_projects/domains/EPMSystem/servers/SERVER_NAME/logs`.
3. Review the product logs in `/diagnostics/logs`. You can also review the diagnostics reports in `/diagnostics/reports`.
4. From the Oracle Hyperion Enterprise Performance Management Workspace Help menu, select **About** and in the **Details** section verify the list of installed products.
5. Launch each listed product from EPM Workspace. The following products can be launched from EPM Workspace:
  - Oracle Hyperion Financial Reporting
  - Oracle Hyperion Planning
  - Oracle Hyperion Financial Management

- Oracle Hyperion Profitability and Cost Management

Before you can access Profitability and Cost Management in EPM Workspace and verify deployment, you must perform some initial tasks. See the *Oracle Hyperion Profitability and Cost Management Administrator's Guide*.

- Oracle Hyperion Calculation Manager
- Oracle Hyperion Financial Data Quality Management, Enterprise Edition
- Oracle Hyperion Financial Close Management.

## Verifying Administration Services Deployment

To verify deployment:

1. Using a web browser, open:

```
WebServer:port/easconsole/console.html
```

2. Log on to Oracle Essbase Administration Services using the Java Web Start console.
3. Review the output for your WebLogic managed server in `MIDDLEWARE_HOME/user_projects/domains/EPMSystem/servers/SERVER_NAME/logs`.
4. Review the product logs in `/diagnostics/logs`. You can also review the diagnostics reports in `/diagnostics/reports`.

## Verifying Provider Services Deployment

To verify deployment:

1. Using a web browser, open:

```
http://Hostname.Example.Com:WebServerListenPortaps/APS
```

2. Review the output for your WebLogic managed server in `MIDDLEWARE_HOME/user_projects/domains/EPMSystem/servers/SERVER_NAME/logs`.
3. Review the product logs in `/diagnostics/logs`. You can also review the diagnostics reports in `/diagnostics/reports`.

## Validating a Financial Close Management Deployment

Oracle Hyperion Financial Close Management Validation Tool scans the system configuration settings needed for successful functioning of Financial Close Management. Oracle recommends that you run Financial Close Management Validation Tool after you complete the installation and configuration steps to test that the components for Financial Close Management are correctly deployed and configured.

To use Financial Close Management Validation Tool:

1. From a web browser, open the following URL:

```
FCMHOST:FCMPORT/fcc/faces/oracle/apps/epm/fcc/ui/page/FCCValidation.jspx
```

where *FCMHOST* is the machine where Financial Close Management is configured and *FCMPORT* is port 8700. You can find this information from WebLogic Administration Console. To view this information, log in to the Administration Console and navigate to **Environment**, and then **Servers**.

2. Log in to the Financial Close Management Validation Tool with a user from the external provider. If there are issues with the external provider configuration, log on with any seeded user (seeded both on WebLogic Server and Oracle Hyperion Shared Services native directory) and run the tool to identify issues with the external provider configuration.
3. Review the status for each of the following:

**Table 11-1 Validation tests for Financial Close Management**

Validation Item	Results
Admin Server	Host Port Status (running/shutdown) DataSources
Foundation Server	Host Port Status DataSources
FCM Managed Server	Host Port Status DataSources
FinancialClose Web Application	Version State DB Type
FinancialCloseTaxOpCommon Web Application	Version State DB Type
EPM-FCM-LIBRARIES library	Version State DB Type
Authentication Providers	DefaultAuthenticator Control Flag EPMIdentityAsserter fcm_valid_users role is created correctly virtualize flag is true LibOVD is enabled
External Authenticators	Lists the external Identity store configuration. The tool lists the values used for the configuration. You must ensure that the entered values are correct.

4. Look for failed tests, diagnose, and fix problems.
5. Run Financial Close Management Validation Tool again until all tests pass.

6. Click **Validate Test Schedule**.

The **Validate Test Schedule** button is enabled only if all the required configuration tests in [Table 1](#) pass without errors.

7. Review the status of the following tasks:

- Business Event
- Composite Instance
- FCM Basic Task
- Human Workflow

In case of any errors, the test FCCTaskExecutionComposite instance is not deleted and you can see more details of the error from the Enterprise Manager console. If all the validation items are successful, then the test composite and instance are deleted.

To use Account Reconciliation Manager Validation Tool:

1. From a web browser, open the following URL to run the Account Reconciliation Manager Validation Tool.

*FCMHOST*:*FCMPORT*/arm/faces/oracle/apps/epm/arm/ui/page/common/ARMValidation.jspx

where *FCMHOST* is the machine where Financial Close Management is configured and *FCMPORT* is the listening port of the FinancialClose0 managed Server in the WebLogic Administration Console. You can find this information from WebLogic Administration Console. To view this information, log in to the Administration Console and navigate to **Environment**, and then **Servers**.

2. Log in to the Account Reconciliation Manager Validation Tool with the Shared Services Admin user.
3. Click **Validate Account Reconciliation Manager Configuration**.
4. Review the status for each of the following:

**Table 11-2 Validation tests for Account Reconciliation Manager**

Validation Item	Results
Admin Server	Host
	Port
	Status (running/shutdown)
	DataSources
Foundation Server	Host
	Port
	Status
	DataSources
FCM Managed Server	Host
	Port
	Status
	DataSources

**Table 11-2 (Cont.) Validation tests for Account Reconciliation Manager**

Validation Item	Results
Account Reconciliation Web Application	Version State DB Type
FinancialCloseTaxOpCommon Web Application	Version State DB Type
EPM-FCM-LIBRARIES library	Version State DB Type
Authentication Providers	DefaultAuthenticator Control Flag EPMIdentityAsserter fcm_valid_users role is created correctly virtualize flag is true LibOVD is enabled
External Authenticators	Lists the authentication providers

5. Look for failed tests, diagnose, and fix problems.
6. Run Account Reconciliation Manager Validation Tool again until all tests pass.

# A

## Ports

This appendix contains information about default port numbers for Oracle Enterprise Performance Management System products including where the port can be configured.

### **Caution:**

These ports are not meant to be used to access a product. For information on starting a product, see [Starting and Stopping EPM System Products](#).

## Default Ports and Shared Services Registry

During the configuration process, default port numbers for most Oracle Enterprise Performance Management System products are automatically populated in Oracle Hyperion Shared Services Registry. During configuration using EPM System Configurator, you can change the default numbers. Each port number on the machine must be unique. (The same product on different machines can have the same port number.) If an error message similar to “port already in use” or “bind error” is displayed, a port number conflict may exist.

If the default port is already in use on the machine, or if there is a conflict, EPM System Configurator will not continue. If the default port number is not changed, the software is configured with the default values.

## WebLogic Administration Server Port

**Table A-1 WebLogic Administration Server Port**

Default Port Number	Where Configurable
7001	The WebLogic Administration Server port is specified during configuration. To change the default port, use the WebLogic Administration Console.



# Oracle Enterprise Manager Java Web Application Port

**Table A-2 Oracle Enterprise Manager Java Web Application Port**

Default Port Number	Where Configurable
7001	The Oracle Enterprise Manager Java Web Application port is configured when you create the domain in EPM System Configurator.

## SSL Ports

For more information about configuring SSL ports, see *Oracle Enterprise Performance Management System Security Configuration Guide*.

## Foundation Services Ports

See these sections for information about Oracle Hyperion Foundation Services ports:

- [Foundation Services Ports](#)
- [Calculation Manager Java Web Application Ports](#)

## Foundation Services Ports

The following table describes the Oracle Hyperion Foundation Services Managed Server Java web application ports and where you can configure them. Foundation Services Managed Server includes Oracle Hyperion Shared Services, Oracle Hyperion Enterprise Performance Management Workspace, and Foundation Web Service.

**Table A-3 Foundation Services Java Web Application Ports**

Port Type	Default Port Number	Where Configurable
Listen port	28080	EPM System Configurator
SSL listen port	28443	EPM System Configurator

**Table A-4 Web Server Ports**

Server	Default Server Port	Where Configurable
Oracle HTTP Server	19000	<code>MIDDLEWARE_HOME/</code> <code>user_projects/</code> <code>epmsystem1/</code> <code>httpConfig/ohs/</code> <code>config/OHS/</code> <code>ohs_component/</code> <code>httpd.conf</code> configurable in the EPM System Configurator.

**Table A-4 (Cont.) Web Server Ports**

Server	Default Server Port	Where Configurable
IIS	80 443 (SSL)	Microsoft Internet Information Services (IIS) Manager Console. Change the TCP port value setting.

## Calculation Manager Java Web Application Ports

**Table A-5 Calculation Manager Java Web Application Ports**

Port Type	Default Port Number	Where Configurable
Listen port	8500	EPM System Configurator
SSL listen port	8543	EPM System Configurator

## Essbase Ports

See these sections for information about Oracle Essbase ports:

- [Essbase Ports](#)
- [Administration Services Ports](#)
- [Provider Services Ports](#)
- [Essbase Studio Ports](#)

## Essbase Ports

**Table A-6 Essbase Default Service Ports**

Service	Default Port Number	Where Configurable
Oracle Essbase Agent	1423	EPM System Configurator
Essbase server applications (ESSVR)	32768–33768 (two ports per process)	EPM System Configurator
Essbase SSL Agent	6423	EPM System Configurator

 **Note:**

Starting in release 11.1.1, if you do not specify Essbase port numbers in EPM System Configurator, the default ports are used.

**Table A-7 OPMN (Oracle Process Manager and Notification Server) Default Ports**

Service	Default Port Number	Where Configurable
Oracle Notification Server Local Port	6711	Open the <code>opmn.xml</code> file and modify the "local" parameter. Then save the file.
Oracle Notification Server Remote Port	6712	Open the <code>opmn.xml</code> file and modify the "remote" parameter. Then save the file.

## Administration Services Ports

**Table A-8 Administration Services Java Web Application Ports**

Port Type	Default Port Number	Where Configurable
Listen port	10080	EPM System Configurator
SSL listen port	10083	EPM System Configurator

## Provider Services Ports

**Table A-9 Provider Services Java Web Application Ports**

Port Type	Default Port Number	Where Configurable
Listen port	13080	EPM System Configurator
SSL listen port	13083	EPM System Configurator

## Essbase Studio Ports

**Table A-10 Essbase Studio Server Ports**

Port Type	Default Port Number	Where Configurable
Listen port	5300	<code>EPM_ORACLE_HOME/products/Essbase/EssbaseStudio/Server/server.properties</code> . Parameters: <code>transport.port=new port number</code>
HTTP listen port	12080	<code>EPM_ORACLE_HOME/products/Essbase/EssbaseStudio/Server/server.properties</code> . Parameters: <code>server.httpPort=new port number</code>

## Financial Reporting Ports

**Table A-11 Financial Reporting Java Web Application Ports**

Port Type	Default Port Number	Where Configurable
Listen port	8200	EPM System Configurator
SSL listen port	8243	EPM System Configurator

**Table A-12 Financial Reporting Default Service Ports**

Service	Default Port Number	Where Configurable
RMI Services and Remote ADM Server	8205-8228 Each Financial Reporting Java Web Application uses two ports, one for RMI services and one for Remote ADM Server (e.g., first Financial Reporting Java Web Application uses ports 8205 and 8206).	EPM System Configurator

## Financial Performance Management Applications Ports

See these sections for information about Oracle's Hyperion Financial Performance Management Applications ports:

- [Financial Management Ports](#)
- [Financial Close Management Ports](#)
- [Planning Ports](#)
- [Profitability and Cost Management Ports](#)

## Financial Management Ports

**Table A-13 Financial Management Java Web Application Port**

Port Type	Default Port Number	Where Configurable
Listen port	7363	EPM System Configurator
SSL listen port	7365	EPM System Configurator

**Table A-14 Financial Management Server Port**

Port Type	Default Port Number	Where Configurable
Port	9091	EPM System Configurator
SSL Port	9092	EPM System Configurator
Datasource Start Port	10001	EPM System Configurator
Datasource End Port	10020	EPM System Configurator

## Financial Close Management Ports

The following table describes the Oracle Hyperion Financial Close Management ports and where you can configure them.

**Table A-15 Financial Close Management Java Web Application Ports**

Type of Port	Default Port Number	Where Configurable
Listen port	8700	EPM System Configurator
SSL listen port	8743	EPM System Configurator

## Tax Management Ports

**Table A-16 Tax Management Java Web Application Port**

Port Type	Default Port Number	Where Configurable
Oracle Hyperion Tax Governance Port	22200	EPM System Configurator
Tax Governance SSL Port	23243	EPM System Configurator
Oracle Hyperion Tax Provision Port	22200	EPM System Configurator
Tax Provision SSL Port	23243	EPM System Configurator

## Planning Ports

**Table A-17 Planning Java Web Application Ports**

Port Type	Default Port Number	Where Configurable
Listen port	8300	EPM System Configurator
SSL listen port	8343	EPM System Configurator

**Table A-18 Planning RMI Server Port**

Service	Default Port Number	Where Configurable
Oracle Hyperion Planning RMI Server	11333	EPM System Configurator

## Profitability and Cost Management Ports

**Table A-19 Profitability and Cost Management Java Web Application Ports**

Port Type	Default Port Number	Where Configurable
Listen port	6756	EPM System Configurator
SSL listen port	6743	EPM System Configurator

## Data Management Ports

See these sections for information about Oracle's Data Management ports.

- [FDMEE Ports](#)
- [Data Relationship Management Ports](#)

### FDMEE Ports

The following table describes the Oracle Hyperion Financial Data Quality Management, Enterprise Edition Java web application ports and where you can configure them.

**Table A-20 FDMEE Java Web Application Ports**

Port Type	Default Port Number	Where Configurable
Listen port	6550	EPM System Configurator
SSL listen port	6553	EPM System Configurator

### Data Relationship Management Ports

The following table describes the Oracle Data Relationship Management default service ports and where you can configure them.

**Table A-21 Data Relationship Management Default Service Port**

Service	Default Port Number	Where Configurable
Data Relationship Management server applications	5200–5400	drm-config.xml using the Data Relationship Management Console.

The following table describes the Data Relationship Management Web server ports and where you can configure them.

**Table A-22 Data Relationship Management Web Server Ports**

Default Web Server Ports	Where Configurable
80 (HTTP) or 443 (when SSL is enabled)	Microsoft Internet Information Services (IIS) Manager Console. (Change the TCP port value setting.)

# B

## JDBC URL Attributes

### Related Topics

- [JDBC Drivers](#)

## JDBC Drivers

During configuration, on the Configure Database page, click Advanced to specify additional JDBC parameters, which are used by Oracle Enterprise Performance Management System JDBC drivers to connect to the database.

The following table describes the format to use to enter the parameters if you are using JDBC drivers.

Database	Format
Oracle Database	<code>jdbc:oracle:thin:@hostname:port:SID</code>
SQL Server	<code>jdbc:weblogic:sqlserver:// hostname:port:databaseName=databaseName</code>

The following table describes additional information about the parameters:

Property	SQL Server	DB2
LOADLIBRARYPATH	Yes	Yes
MAXPOOLEDSTATEMENTS	Yes	Yes
ALTERNATESERVERS	Yes	Yes
CONNECTIONRETRYCOUNT	Yes	Yes
CONNECTIONRETRYDELAY	Yes	Yes
LOADBALANCING	Yes	Yes
DYNAMICSECTIONS		Yes
CREATEDFAULTPACKAGE		Yes
REPLACEPACKAGE		Yes
DATABASENAME	Yes	Yes

For Oracle Database parameters, see the Oracle Thin JDBC Driver documentation.

For more information, see the *Oracle® Database JDBC Developer's Guide 11g Release 2 (11.2)*: [http://docs.oracle.com/cd/E11882\\_01/java.112/e16548/urls.htm#BEIJFHBB](http://docs.oracle.com/cd/E11882_01/java.112/e16548/urls.htm#BEIJFHBB).

## URL for Oracle RAC

To provide client-side failover and load-balancing for Oracle RAC, enter the URL in the form of:

*host:port/serviceName*



### Note:

Using Oracle RAC with Oracle Enterprise Performance Management System also requires the SCAN Listener to be enabled.

## LDAP-Based URL for Oracle Database

Oracle Database supports authentication using an LDAP server. To use LDAP-based database authentication, enter the URL in the following format:

```
jdbc:oracle:thin:@ldap://oid:5000/mydb1,cn=OracleContext,dc=myco,dc=com
```

## URL for SSL

To enable SSL for the JDBC connections, during configuration, on the Configure Database page, click Advanced and select “Use secure connection to the database (SSL).”

Use the following additional parameters when JDBC SSL is selected and you are using Microsoft SQL Server.

- ENCRYPTIONMETHOD=SSL
- TRUSTSTORE=*Path to trust store*
- TRUSTSTOREPASSWORD=*trust store password*
- VALIDATESERVERCERTIFICATE="true"

Use the following URL format when JDBC SSL is selected and you are using Oracle Database.

```
jdbc:oracle:thin:@(DESCRIPTION=(ADDRESS=(PROTOCOL=tcps)  
  
(HOST=host1)(PORT=1521))  
  
(CONNECT_DATA=(SERVICE_NAME=service)  
  
)  
  
)
```



# C

## EPM System Services

This appendix provides details about start menus, service names, and start and stop scripts for each Oracle Enterprise Performance Management System component.

Note that Start menu items for Java web applications are available only on the machine on which the web server is installed.

If you deploy components to a single managed server, the managed server name is `EPMServerN`, where `N` is 0 for the managed server, and 1 or higher if you scale out the single managed server.

You can monitor the health and performance of the EPM System Java web applications using Oracle Enterprise Manager, which is automatically deployed with EPM System Configurator if you deploy Java web applications with Oracle WebLogic Server. You can see the status of the servers and the Java web applications running, the servers they are running on, and the ports they are listening on. See "Using Enterprise Manager to Monitor EPM System Java Web Applications" in the *Oracle Enterprise Performance Management System Deployment Options Guide*.

### Web Server

The Oracle HTTP Server service is managed and monitored with Node Manager. See [Starting and Stopping Oracle HTTP Server](#).

### Foundation Services Application Server

The following table describes the services and processes for the Oracle Hyperion Foundation Services application server, which includes Oracle Hyperion Shared Services, and Oracle Hyperion Enterprise Performance Management Workspace Java web applications.

**Table C-1 Foundation Services Application Server Services and Processes**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , then <code>EPM_ORACLE_INSTANCE_NAME</code> , and then <b>Start FoundationServices (Oracle WebLogic 10)</b>
<b>Registered Service Name</b>	<code>HyS9FoundationServices_instanceName</code>
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion Foundation Services - Managed Server ( <code>instanceName</code> )
<b>Description</b>	Hyperion Foundation Services support Hyperion applications, including authentication, user provisioning, task flow management, data and metadata synchronization

**Table C-1 (Cont.) Foundation Services Application Server Services and Processes**

Information Type	Details
<b>Windows Startup Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/startFoundationServices.bat
<b>Windows Stop Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/stopFoundationServices.bat

## Calculation Manager Application Server

The following table describes the services and processes for Oracle Hyperion Calculation Manager.

**Table C-2 Calculation Manager Services and Processes**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start CalcMgr (Oracle WebLogic 10)</b>
<b>Registered Service Name</b>	HyS9CALC_ <i>instanceName</i>
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion CALC Manager - Java Web Application ( <i>instanceName</i> )
<b>Description</b>	Provide access service to CALC Manager Web Server
<b>Windows Startup Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/startCalcMgr.bat
<b>Windows Stop Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/stopCalcMgr.bat

## Essbase Server

During installation, EPM System Installer installs OPMN and registers Oracle Essbase Server for OPMN. OPMN manages the Essbase Agent, which manages the Essbase Server.

Navigate to *EPM\_ORACLE\_INSTANCE*/bin and use the following commands to start and stop Essbase Server:

- `opmnctl startall`
- `opmnctl stopall`

If you are using Essbase in a clustered environment, there are additional steps required to set up Essbase failover on both nodes of the cluster. See "Editing OPMN.XML for Active-Passive Essbase Clusters" in the *Oracle Enterprise Performance Management System Deployment Options Guide*.

The following table describes additional methods for starting and stopping Essbase Server. Note that the Essbase Server start and stop scripts redirect to OPMN.

For information about OPMN, see the Oracle® Fusion Middleware Oracle Process Manager and Notification Server Administrator's Guide Release 11g (11.1.1.2.0) ([http://download.oracle.com/docs/cd/E15523\\_01/doc.1111/e14007/toc.htm](http://download.oracle.com/docs/cd/E15523_01/doc.1111/e14007/toc.htm))

**Table C-3 Starting and Stopping Essbase Server**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , then <b>Start Essbase</b> This command launches <code>startEssbase.bat</code> (and redirects to OPMN).
<b>Registered Service Name</b>	OracleProcessManager_EPM_instanceName
<b>Display Name in Windows Services Control Panel</b>	Oracle Process Manager_instanceName
<b>Description</b>	OPMN service for Essbase
<b>Windows Startup Script</b>	<ul style="list-style-type: none"> <li>Essbase Server — <code>EPM_ORACLE_INSTANCE/bin/startEssbase.bat</code> (redirects to OPMN) Each instance of Essbase Server has its own startup script. If you configured an additional instance of Essbase, <code>startEssbase.bat</code> is located in <code>additionalInstanceLocation/bin</code>. Launch the start script from this location to launch this instance of Essbase.</li> <li>ESSCMD — <code>EPM_ORACLE_INSTANCE/EssbaseServer/EssbaseServerInstanceName/bin/startEsscmd.bat</code> (also available in the <code>/EssbaseClient</code> directory)</li> <li>essmsh — <code>EPM_ORACLE_INSTANCE/EssbaseServer/EssbaseServerInstanceName/bin/startMax1.bat</code> (also available in the <code>/EssbaseClient</code> directory)</li> </ul> <p>All the scripts call <code>setEssbaseEnv.bat</code> to set up <code>ESSBASEPATH</code>, <code>ARBORPATH</code>, and <code>PATH</code> before starting.</p>
<b>Windows Stop Script</b>	<p><b>Server:</b> Essbase Server — <code>EPM_ORACLE_INSTANCE/bin/stopEssbase.bat</code> (redirects to OPMN)</p>

Stopping Essbase Server can take some time, depending on how many Essbase applications are running on the server. To stop Essbase Server, you need Administrator permissions.

See the *Oracle Essbase Database Administrator's Guide* for more information about shutting down Essbase Server.

For more information about stopping Essbase Server, see the *Oracle Essbase Database Administrator's Guide* and the *Oracle Essbase Technical Reference*.

## Administration Services Server

The following table describes the services and processes for the Oracle Essbase Administration Services server.

**Table C-4 Administration Services Application Server Service/Process**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start EssbaseAdminServices (Oracle WebLogic 10)</b>
<b>Registered Service Name</b>	<i>Hys9eas_instanceName</i>
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion Administration Services - Java Web Application ( <i>instanceName</i> )
<b>Description</b>	Controls the running of an Applications Server
<b>Windows Startup Script</b>	<i>EPM_ORACLE_INSTANCE/bin/startEssbaseAdminServices.bat</i>
<b>Windows Stop Script</b>	<i>EPM_ORACLE_INSTANCE/bin/stopEssbaseAdminServices.bat</i>

## Essbase Studio Server

The following table describes the services and processes for the Oracle Essbase Studio server.

**Table C-5 Essbase Studio Server**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , then <i>EPM_ORACLE_INSTANCE_NAME</i> , and then <b>Start Server</b>
<b>Registered Service Name</b>	<i>HYS9EssbaseStudio_instanceName</i>
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion Essbase Studio Server ( <i>instanceName</i> )
<b>Description</b>	NA
<b>Windows Startup Script</b>	<i>EPM_ORACLE_INSTANCE/BPMS/bin/startServer.bat</i>
<b>Windows Stop Script</b>	<i>EPM_ORACLE_INSTANCE/BPMS/bin/stopServer.bat</i>

## Provider Services Application Server

The following table describes the services and processes for the Oracle Hyperion Provider Services application server.

Table C-6 Provider Services Application Server Services and Processes

Information Type	Details
Windows Start Menu Command	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start AnalyticProviderServices (Oracle WebLogic 10)</b>
Registered Service Name	HyS9aps_instanceName
Display Name in Windows Services Control Panel	Oracle Hyperion Provider Services - Java Web Application ( <i>instanceName</i> )
Description	Provide access service to Oracle Hyperion Provider Services
Windows Startup Script	<i>EPM_ORACLE_INSTANCE</i> /bin/ startAnalyticProviderServices.bat
Windows Stop Script	<i>EPM_ORACLE_INSTANCE</i> /bin/ stopAnalyticProviderServices.bat

## Financial Reporting Application Server

The following table describes the services and processes for the Oracle Hyperion Financial Reporting application server, which includes the Financial Reporting Print Server, Financial Reporting Web Studio, and Document Repository.

Table C-7 Financial Reporting Application Server Services and Processes

Information Type	Details
Windows Start Menu Command	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start FinancialReporting (Oracle WebLogic 10)</b>
Registered Service Name	HyS9FRReports_instanceName
Display Name in Windows Services Control Panel	Oracle Hyperion Financial Reporting - Java Web Application ( <i>instanceName</i> )
Description	Provide access service to Hyperion Financial Reporting Web Server
Windows Startup Script	<i>EPM_ORACLE_INSTANCE</i> /bin/ startFinancialReporting.bat
Windows Stop Script	<i>EPM_ORACLE_INSTANCE</i> /bin/ stopFinancialReporting.bat

## Planning Application Server

The following table describes the services and processes for the Oracle Hyperion Planning application server.

Table C-8 Planning Application Server Services and Processes

Information Type	Details
Windows Start Menu Command	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start Planning (Oracle WebLogic 10)</b>

**Table C-8 (Cont.) Planning Application Server Services and Processes**

Information Type	Details
Registered Service Name	HyS9Planning_ <i>instanceName</i>
Display Name in Windows Services Control Panel	Oracle Hyperion Planning - Java Web Application ( <i>instanceName</i> )
Description	Provides access service to Planning Web server
Windows Startup Script	<i>EPM_ORACLE_INSTANCE</i> /bin/startPlanning.bat
Windows Stop Script	<i>EPM_ORACLE_INSTANCE</i> /bin/stopPlanning.bat

In addition, Planning uses the Hyperion RMI Registry.

**Table C-9 Hyperion RMI Registry Application Server Services and Processes**

Information Type	Details
Windows Start Menu Command	N/A
Registered Service Name	HyS9RMI Registry_ <i>instanceName</i>
Display Name in Windows Services Control Panel	Oracle Hyperion RMI Registry ( <i>instanceName</i> )
Description	Provides access service to Oracle Hyperion RMI Registry
Windows Startup Script	<i>EPM_ORACLE_INSTANCE</i> /bin/startRMI.bat
Windows Stop Script	<i>EPM_ORACLE_INSTANCE</i> /bin/stopRMI.bat

## Financial Management Server

The following table describes the services and processes for Oracle Hyperion Financial Management.

**Table C-10 Financial Management Server**

Information Type	Details
Windows Start Menu Command	N/A
Registered Service Name	HyS9FinancialManagementJavaServer_ <i>instanceName</i>
Display Name in Windows Services Control Panel	Oracle Hyperion Financial Management - Java Server ( <i>instanceName</i> )
Description	Oracle Hyperion Financial Management - Java Server
Windows Startup Script	<i>EPM_ORACLE_INSTANCE</i> /bin/startHFMJavaServer.bat
Windows Stop Script	<i>EPM_ORACLE_INSTANCE</i> /bin/stopHFMJavaServer.bat

 **Note:**

The synchronization between Financial Management application servers is based on system time. Changing the clock can affect this synchronization. For the time change to and from Daylight Savings Time, Oracle recommends that you stop the servers before the time change and restart them afterward.

## Financial Management Application Server

The following table describes the services and processes for the Oracle Hyperion Financial Management Java web application server, which includes FM Web services and FM ADF Java web application.

**Table C-11 Financial Management Java Web Application Services and Processes**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start HFMWeb (Oracle WebLogic 10)</b>
<b>Registered Service Name</b>	HyS9FinancialManagementWeb_instanceName
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion Financial Management - Web Tier ( <i>instanceName</i> )
<b>Description</b>	Provides JEE support to Financial Management.
<b>Windows Startup Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/startHFMWeb.bat
<b>Windows Stop Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/stopHFMWeb.bat

## Profitability and Cost Management Application Server

The following table describes the services and processes for Oracle Hyperion Profitability and Cost Management.

**Table C-12 Profitability and Cost Management Services and Processes**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start Profitability (Oracle WebLogic 10)</b>
<b>Registered Service Name</b>	HyS9HyS9PftWeb_instanceName
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion Profitability - Java Web Application ( <i>instanceName</i> )
<b>Description</b>	Provides a Workspace module for Profitability.
<b>Windows Startup Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/startProfitability.bat

**Table C-12 (Cont.) Profitability and Cost Management Services and Processes**

Information Type	Details
Windows Stop Script	<code>EPM_ORACLE_INSTANCE/bin/stopProfitability.bat</code>

## Financial Close Management Application Server

The following table describes the services and processes for the Oracle Hyperion Financial Close Management application server.

 **Note:**

Ensure that you complete the post-configuration tasks before you start Financial Close Management. See [Financial Close Management and Tax Governance Manual Configuration Tasks](#).

 **Note:**

Before you start Financial Close Management, note the following server startup order:

- WebLogic Administration Server
- Hyperion Foundation Services Managed Server
- Oracle HTTP Server - See [Starting and Stopping Oracle HTTP Server](#)
- In any order:
  - Financial Close Management Java web application
  - Oracle Hyperion Financial Management Web Services Managed Server, if you're using Financial Management with Financial Close Management
  - Oracle Hyperion Financial Reporting Java web application, if you're using Financial Reporting with Financial Close Management
  - Oracle Hyperion Financial Data Quality Management, Enterprise Edition, if you are using Account Reconciliation Manager

**Table C-13 Financial Close Management Services and Processes**

Information Type	Details
Windows Start Menu Command	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start FinancialClose (Oracle WebLogic 10)</b>
Registered Service Name	<code>HyS9FinancialClose_instanceName</code>



**Table C-13 (Cont.) Financial Close Management Services and Processes**

Information Type	Details
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion Financial Close Management - Java Web Application ( <i>instanceName</i> )
<b>Description</b>	Provide access service to Financial Close Manager Java Web Application
<b>Windows Startup Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/startFinancialClose.bat
<b>Windows Stop Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/stopFinancialClose.bat

## Tax Management Application Server

The following table describes the services and processes for Tax Management.

For Oracle Hyperion Tax Provision, Oracle Hyperion Financial Management must also be running.

If you are using Oracle Hyperion Tax Governance, start services in the order listed in [Financial Close Management Application Server](#).

**Table C-14 Tax Management Services and Processes**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start TaxManagement (Oracle WebLogic 10)</b>
<b>Registered Service Name</b>	HyS9TaxManagement_ <i>instanceName</i>
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion Tax Management - Java Web Application ( <i>instanceName</i> )
<b>Description</b>	Provides access service to Tax Management Java Web Application.
<b>Windows Startup Command</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/startTaxManagement.bat
<b>Windows Stop Command</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/stopTaxManagement.bat

## Data Relationship Management

The following table describes the services and processes for Oracle Data Relationship Management.

**Table C-15 Data Relationship Management Services and Processes**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , then Data Relationship Management, then Configuration Console or <code>EPM_ORACLE_HOME/products/DataRelationshipManagement/server/bin/drm-server-console.exe</code>
<b>Registered Service Name</b>	Oracle DRM Service
<b>Display Name in Windows Services Control Panel</b>	Oracle DRM Service
<b>Description</b>	Handles starting and stopping of required server applications in the Oracle DRM environment
<b>Windows Startup Command</b>	Net start "Oracle DRM Service"
<b>Windows Stop Command</b>	Net stop "Oracle DRM Service"

In addition, Data Relationship Management has a web tier component that runs in IIS.

## Data Relationship Management Analytics

The following table describes the services and processes for Oracle Data Relationship Management Analytics.

**Table C-16 Data Relationship Management Analytics Services and Processes**

Information Type	Details
<b>Windows Start Menu Command</b>	N/A
<b>Registered Service Name</b>	Oracle DRM Managed Server (DRMServer)
<b>Display Name in Windows Services Control Panel</b>	Oracle DRM Managed Server (DRMServer)
<b>Description</b>	N/A
<b>Windows Startup Command</b>	net start "Oracle DRM Managed Server (DRMServer)"
<b>Windows Stop Command</b>	net stop "Oracle DRM Managed Server (DRMServer)"

## FDMEE Application Server

The following table describes the services and processes for Oracle Hyperion Financial Data Quality Management, Enterprise Edition.

**Table C-17 FDMEE Services and Processes**

Information Type	Details
<b>Windows Start Menu Command</b>	Select <b>Start</b> , then <b>Oracle EPM System</b> , and then <b>Start ErpIntegrator (Oracle WebLogic 10)</b>
<b>Registered Service Name</b>	HyS9aifWeb_ <i>instanceName</i>

Table C-17 (Cont.) FDMEE Services and Processes

Information Type	Details
<b>Display Name in Windows Services Control Panel</b>	Oracle Hyperion FDM Enterprise Edition - Java Web Application ( <i>instanceName</i> )
<b>Description</b>	Provides a Workspace module for FDM EE.
<b>Windows Startup Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/ startERPIntegrator.bat
<b>Windows Stop Script</b>	<i>EPM_ORACLE_INSTANCE</i> /bin/ stopERPIntegrator.bat