

## Financial Management Rapid Deployment

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### About This Document

This document presents recommended steps to build a typical Oracle Hyperion Financial Management development environment on a single server running Microsoft Windows. This deployment is not intended for use in a production environment. A typical Financial Management development environment comprises the following products:

- Financial Management
- Foundation Services
- Oracle Hyperion Financial Reporting
- Oracle Smart View for Office
- Required products including Oracle Database and Oracle WebLogic Server

### Deployment Requirements

#### Server

**Table 1-1 Server Requirements**

Requirement	Description
Server Operating System	Windows Server 2019 or Windows Server 2016 (Windows 2016 support is available in Release 11.2.1).
Processor	x64
Memory	16 GB RAM
Disk	200 GB Disk
Other Software	<ul style="list-style-type: none"><li>• A program, such as 7-Zip or WinZip, to extract the contents of media packs</li><li>• Microsoft Office 2016 or 2019 (to support Oracle Smart View for Office)</li></ul>

## User Account

Use a generic Windows user account, for example, `epm_user`, that satisfies the following requirements. This account is referred to as *deployment account* throughout this document:

- The deployment account is a member of the Administrators group on the server on which you are deploying this domain.
- The following local security policies are assigned to the deployment account. By default, these policies are granted to members of the Administrators group:
  - Act as part of the operating system
  - Bypass traverse checking
  - Log on as a batch job
  - Log on as a service
- User account control is disabled for the deployment account

The password that you select for this account will be used as the password for Oracle Database Administrator, Oracle Database User, WebLogic Administrator, and EPM Administrator. This password is referred to as the *deployment password* throughout this document.

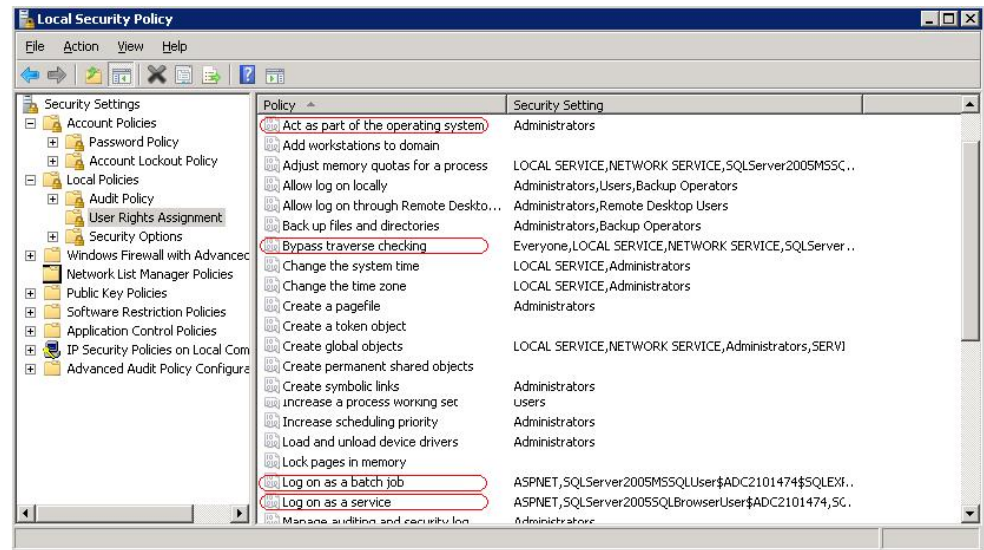
The deployment password must conform to these guidelines:

- Contain at least one uppercase letter
- Contain at least one numeral
- Be at least eight characters long
- Contain no special characters

## Verifying Local Security Policy Assignments

To verify that local security policies are assigned to the deployment account:

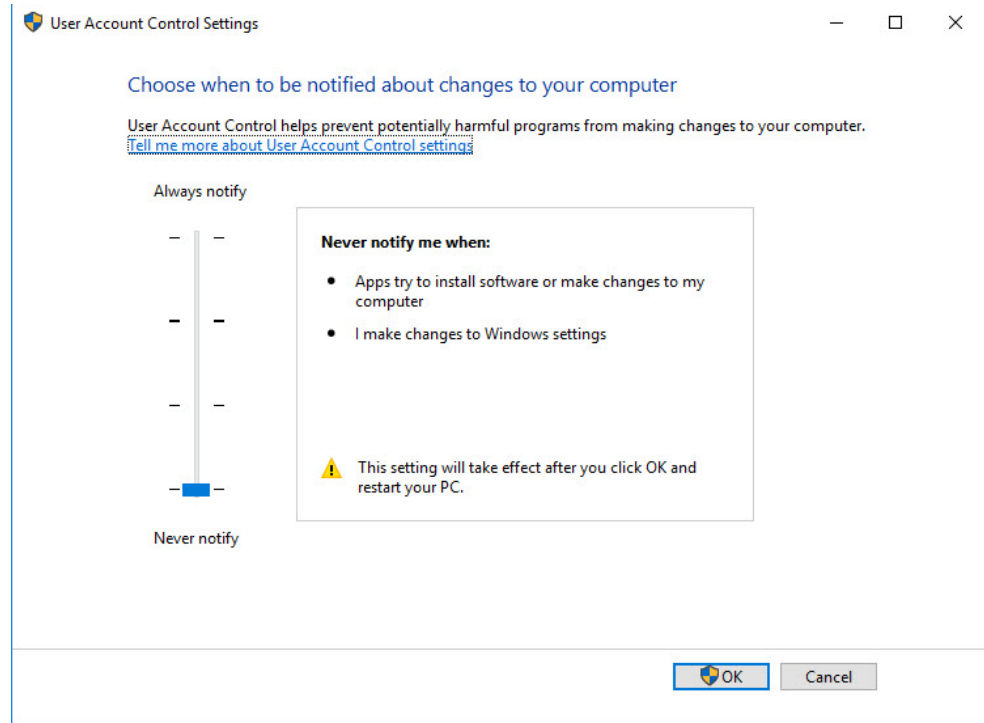
1. Log on to the server using the deployment account.
2. On the server, click **Start**, then **Windows Administrative Tools**, and then **Local Security Policy**.
3. In **Local Security Policy**, expand **Local Policies**, and then select **User Rights Assignment**.
4. Verify that the security setting for the policies highlighted in the following screen shot includes the Administrators group. Double-click the security setting of the policy to view its properties and assignments.



## Disabling User Account Control

To turn off user account control:

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



6. Click **OK**.

## Server Name

You must know your server name to complete the deployment process. Determine the name of your server by entering `hostname` in a command prompt. The name of your server is referred to as the *HostName* throughout this document.

## Deployment Process

The deployment process involves the following steps:

- [Step 1: Downloading Installation Files](#)
- [Step 2: Installing and Configuring Oracle Database](#)
- [Step 3: Installing the Financial Management Domain](#)
- [Step 4: Creating Infrastructure Schemas Using Repository Creation Utility](#)
- [Step 5: Configuring the Financial Management Domain](#)
- [Step 6: Verifying Financial Management Domain Deployment](#)

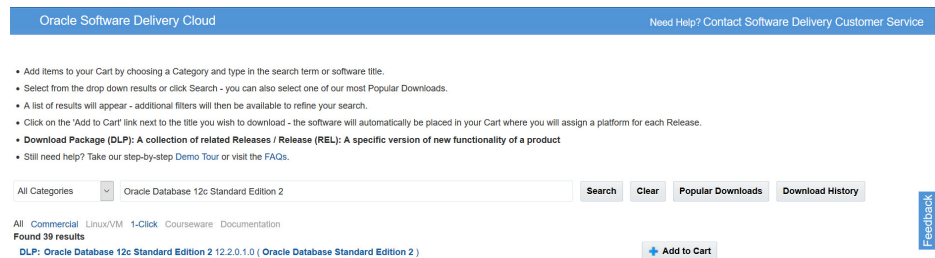
## Step 1: Downloading Installation Files

This section explains how to download Oracle Database 12c Standard Edition 2 and Oracle Enterprise Performance Management System product download files and

get them ready. You can download files simultaneously. Using a T1 connection, downloading files takes approximately 20 minutes. You must also download Oracle Smart View for Office from Oracle Technology Network.

To download from Oracle Software Delivery Cloud:

1. Create a folder named `epm_downloads` on your server. The file path should not contain spaces.
2. Using a browser, go to <http://edelivery.oracle.com>.
3. On the Oracle Software Delivery Cloud, click **Sign In**.
4. In **Sign In**, enter your Oracle Software Delivery Cloud user name and password, and then click **Sign In**.
5. Download files to install Oracle Database.
  - a. In the search box, search for **Oracle Database 12c Standard Edition 2** and click **Search**.
  - b. In the **Results** section, select **Oracle Database 12c Standard Edition 2 12.2.0.1.0 (Oracle Database Standard Edition 2)**, and then click **Add to Cart**.



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



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














7. Click **Checkout**.

8. In the **Platform/Languages** column, for each row, select **Microsoft Windows x64 (64-bit)** if it's not already selected, and then click **Continue**.

9. Review and accept the Oracle Standard Terms and Restrictions and then click **Continue**.

10. Use the download manager to download files: Select the check boxes next to the desired files, click **Download**, select a download location, and then click **Save**. The single use download manager is saved to your computer.

11. From the download location, run the executable file. Browse to save the files in `epm_downloads` and then click **Next**.

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

12. When the download is complete, close the Download Manager.

13. Using a program such as 7-Zip, extract the contents of the each of the ZIP files to `epm_downloads`.

To download Smart View:

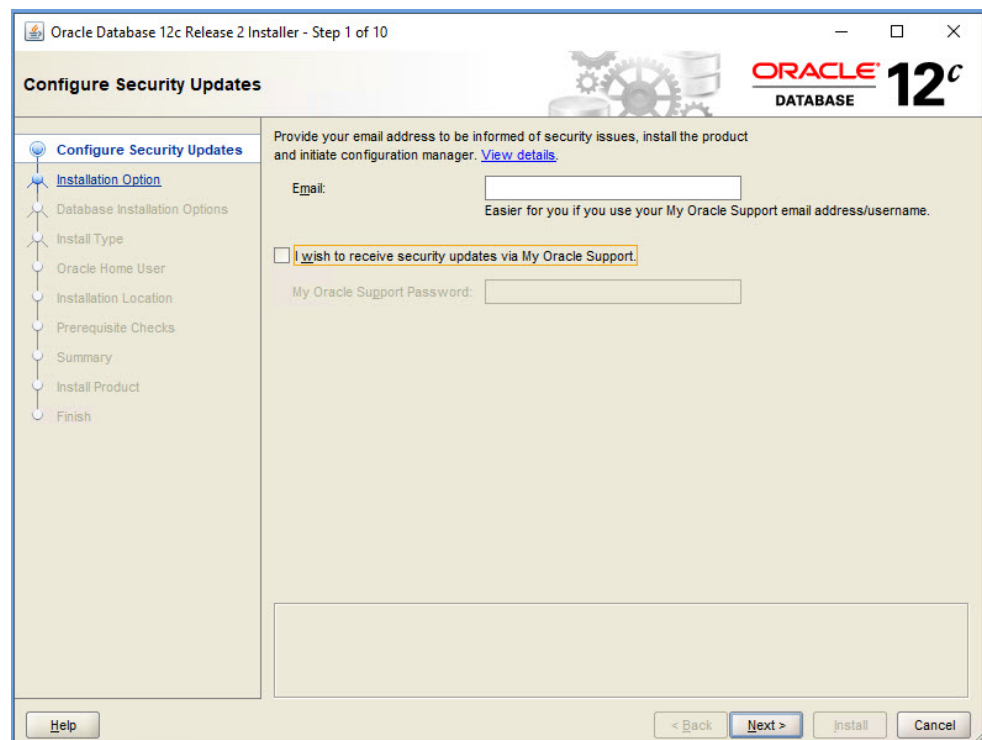
1. Using a browser, go to [www.oracle.com/technetwork/middleware/smart-view-for-office/downloads/index.html](http://www.oracle.com/technetwork/middleware/smart-view-for-office/downloads/index.html).
2. Click **Oracle SmartView for Office**.
3. Click **Download Now**, accept the license agreement and then click **Download**.
4. Click **Save File**, browse to `epm_downloads`, and then click **Save**.
5. Using a program, for example 7-Zip, extract the contents of the Smart View ZIP file into `epm_downloads`.

## Step 2: Installing and Configuring Oracle Database

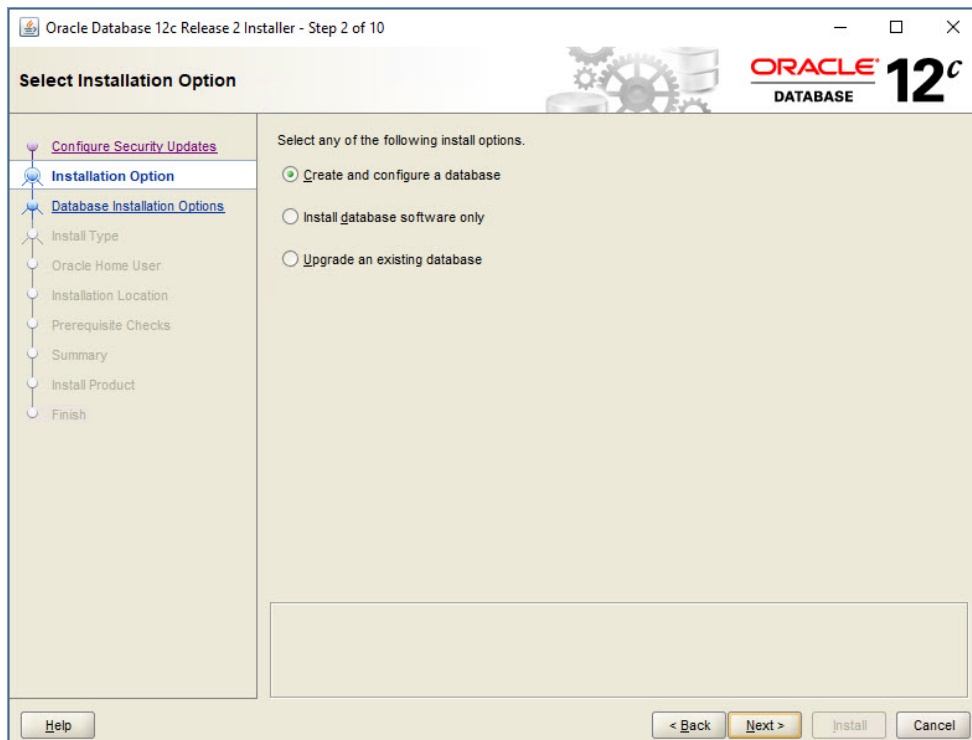
To install and configure Oracle Database:

1. Using Windows Explorer, navigate to `epm_downloads\database`, and then double-click `setup.exe` to launch the installer.
2. In **Configure Security Updates**, clear **I wish to receive security updates via My Oracle Support**, and then click **Next**.

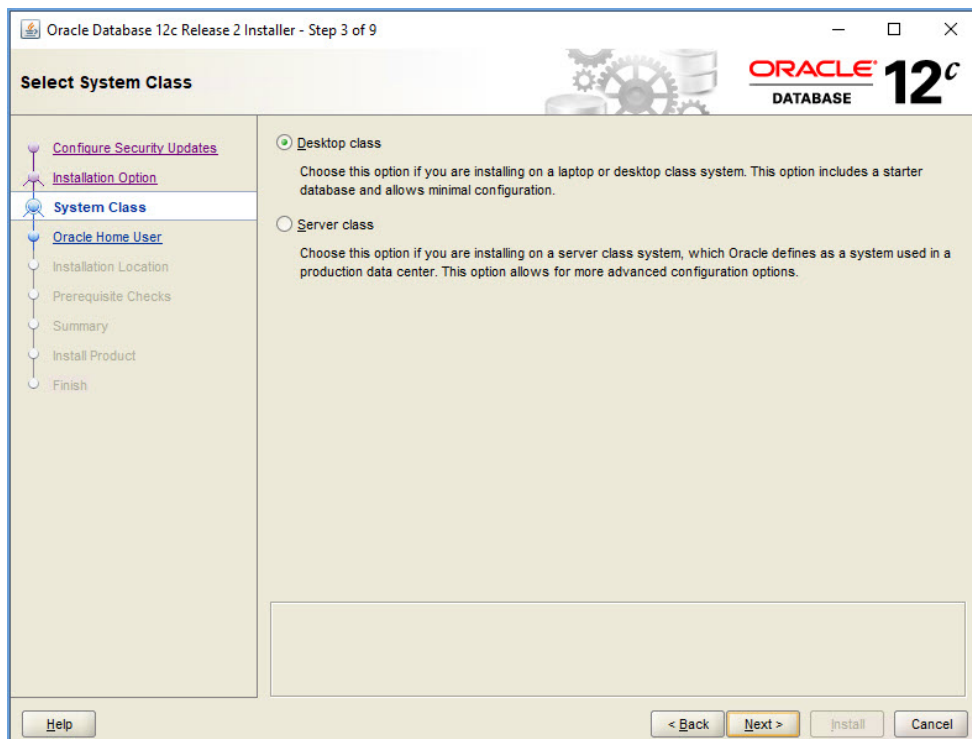
A warning that you did not provide an email address is displayed.



3. In **Email Address Not Specified**, click **Yes**.
4. In **Select Installation Option**, ensure that **Create and configure a database** is selected, and then click **Next**.



5. In **Select System Class**, select **Desktop class**, and then click **Next**.

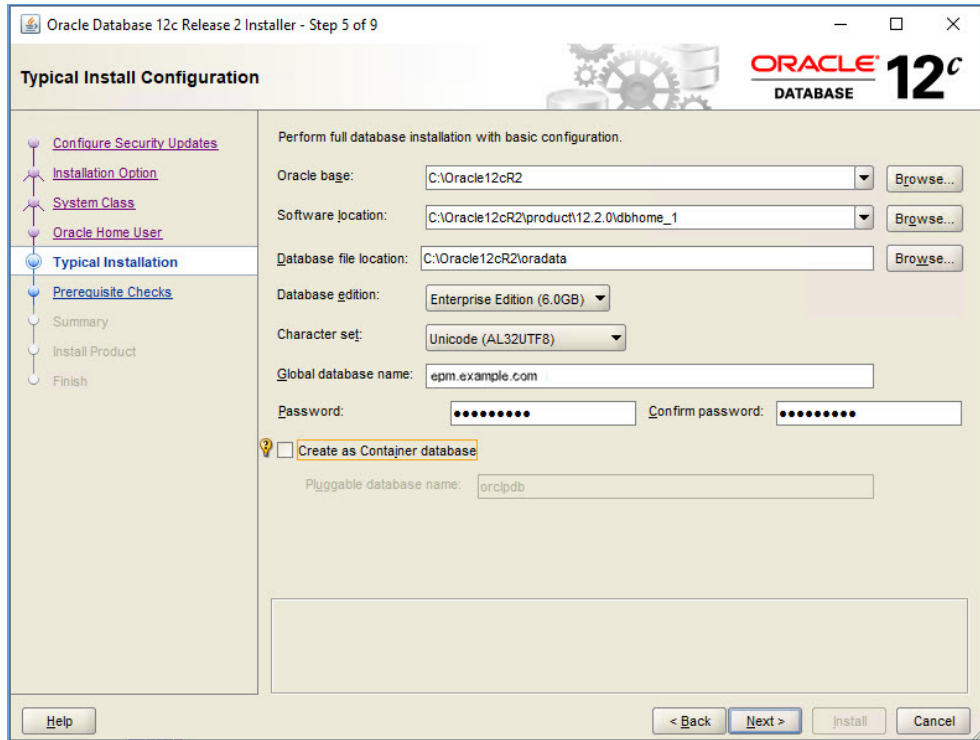




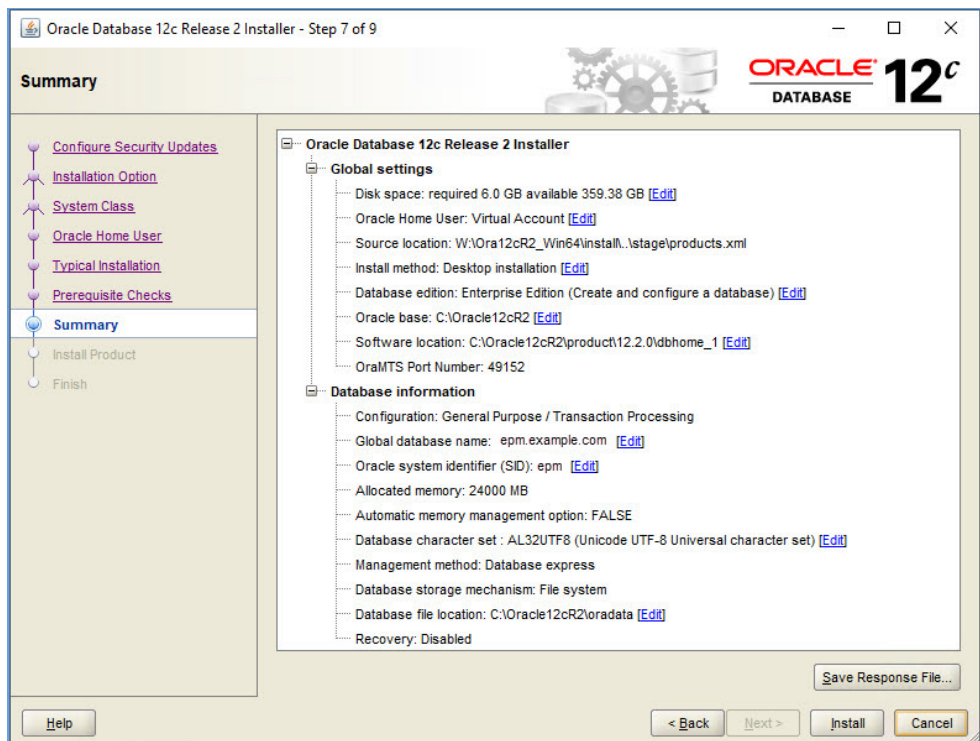
6. In **Specify Oracle Home User**, select **Use Virtual Account**, and then click **Next**.

The screenshot shows the 'Specify Oracle Home User' step of the Oracle Database 12c Release 2 installer. The window title is 'Oracle Database 12c Release 2 Installer - Step 4 of 9'. The Oracle logo and '12c DATABASE' are in the top right. A navigation pane on the left lists steps: Configure Security Updates, Installation Option, System Class, Oracle Home User (selected), Installation Location, Prerequisite Checks, Summary, Install Product, and Finish. The main area contains the following text: 'For enhanced security, you may choose to run Windows Services from this Oracle home with a non-administrator account. Oracle recommends that you choose a Virtual Account or specify a standard Windows User Account for this purpose.' There are four radio button options: 'Use Virtual Account' (selected), 'Use Existing Windows User', 'Create New Windows User', and 'Use Windows Built-in Account'. The 'Use Existing Windows User' and 'Create New Windows User' options have input fields for 'User Name' and 'Password'. The 'Create New Windows User' option also has a 'Confirm Password' field. A note states: 'The newly created user is denied Windows logon privileges.' At the bottom, there are buttons for 'Help', '< Back', 'Next >', 'Install', and 'Cancel'.

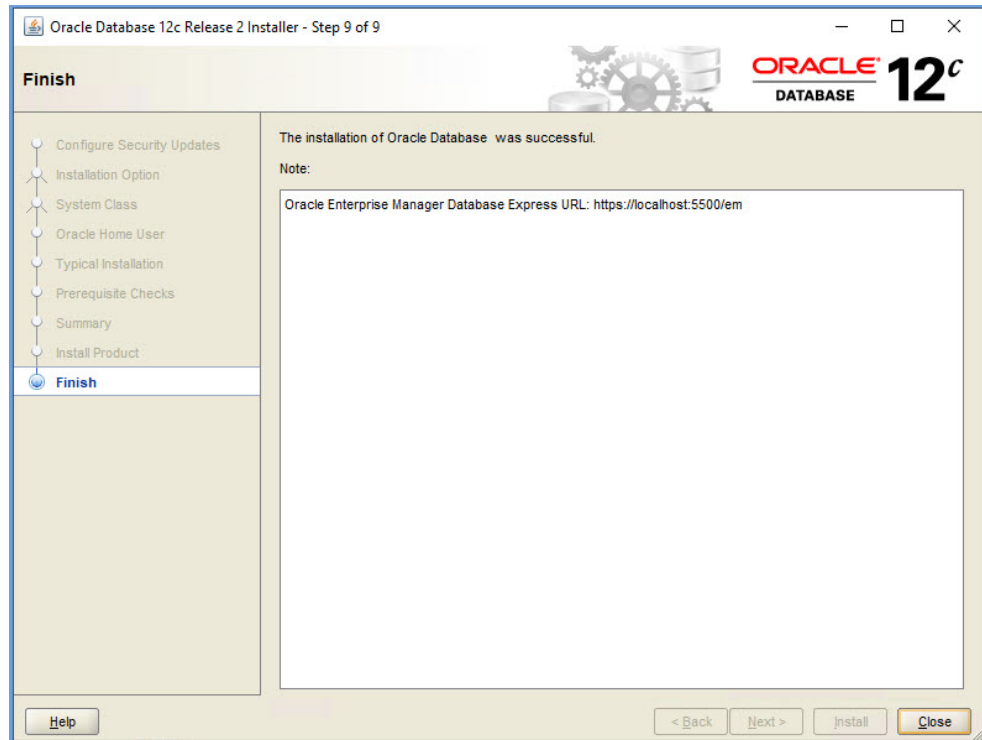
7. In **Typical Install Configuration**, enter the following details. Keep default values for all other fields. Click **Next** when you are done.
- **Database edition**—Select **Enterprise Edition (6.0GB)**.
  - **Global database name**—Set to `epm`.
  - **Password**—Enter the deployment password.
  - **Confirm password**—Reenter the deployment password.



8. In **Summary**, click **Install**.



9. In **Finish**, click **Close**.



10. After installation is complete, create a database user named **epm\_user**, and assign roles and privileges and set parameters.

- On your server, from the **Start** menu, select **Oracle-OraClient18c32\_user\_name** (for 32-bit) or **Oracle-OraClient18c64\_user\_name** (for 64-bit), and then **SQL Plus**.
- For **Enter user name**, enter `SYS as SYSDBA`.
- For **Password**, enter the deployment password.
- Create a database user named **epm\_user**, identified by the deployment password, by executing this statement: `create user epm_user identified by DEPLOYMENT_PWD;`. Remember to replace `DEPLOYMENT_PWD` with your actual deployment password.

- Grant privileges to **epm\_user** by entering the following command:

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

- Set parameters:

```
ALTER SYSTEM SET processes=2000 SCOPE=SPFILE;  
ALTER SYSTEM SET OPEN_CURSORS=5000 SCOPE=SPFILE;
```

```
ALTER SYSTEM SET SESSION_CACHED_CURSORS=200 SCOPE=SPFILE;  
ALTER SYSTEM SET SESSIONS=2000 SCOPE=SPFILE;
```

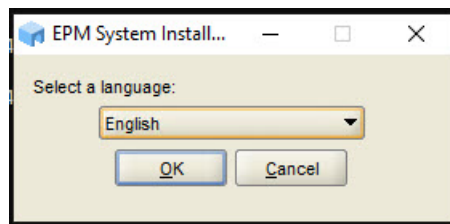
- The `sqlnet.ora` file in the database server (in `%ORACLE_HOME%\product\xx.x.x\dbhome_1\network\admin\sqlnet.ora`) should have the following setting: `sqlnet.expire_time=10`
- Set the `max_string_size` setting to standard.

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

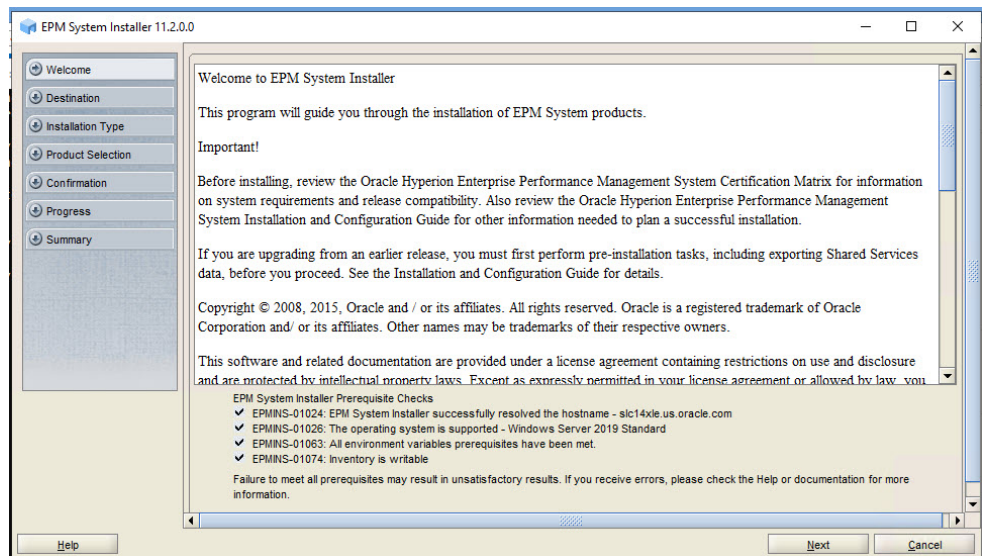
## Step 3: Installing the Financial Management Domain

To install the Oracle Hyperion Financial Management domain of Oracle Enterprise Performance Management System:

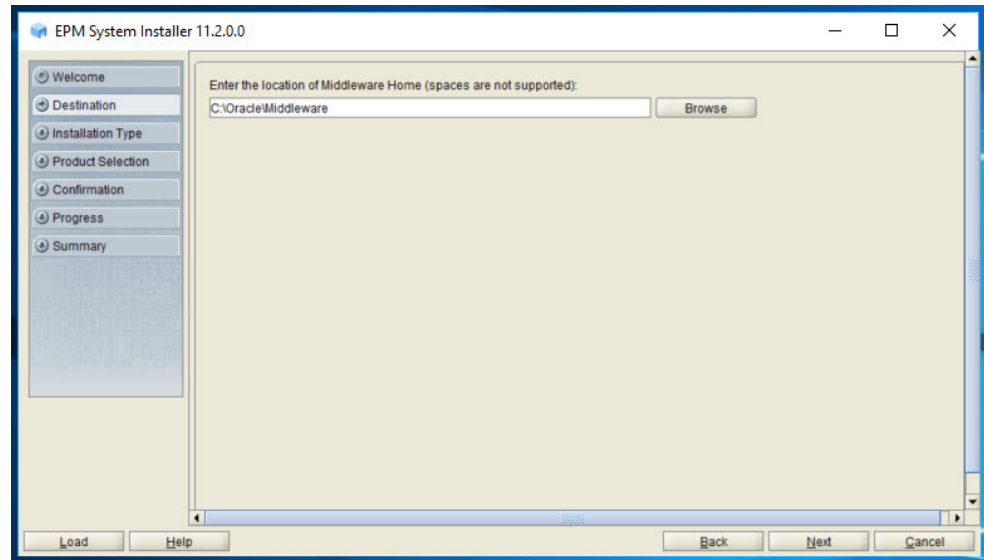
1. In Windows Explorer, navigate to the `epm_downloads` folder, and then double-click `installTool.cmd`.
2. In EPM System Installer, select a language, and then click **OK**.



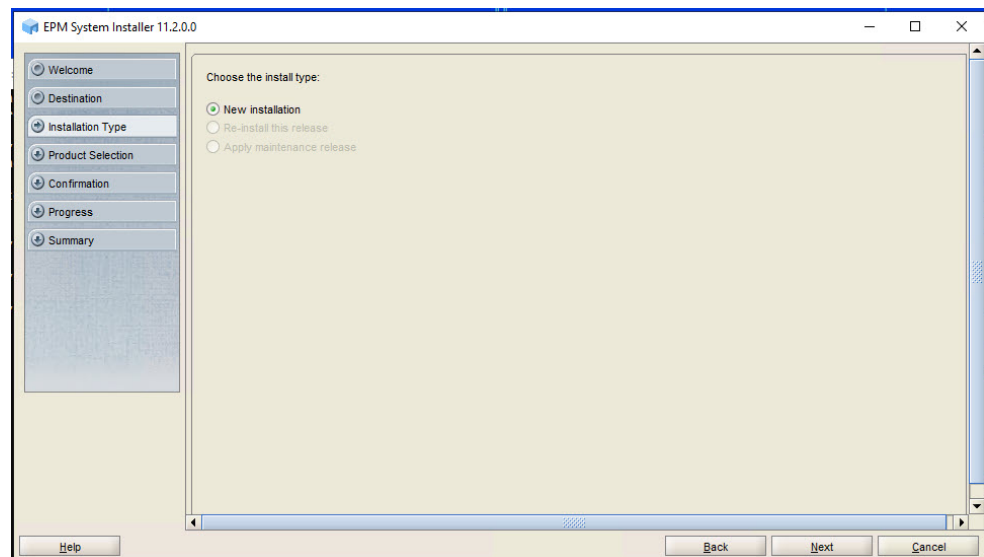
3. In **Welcome**, verify that your system has passed all prerequisite checks, and then click **Next**.



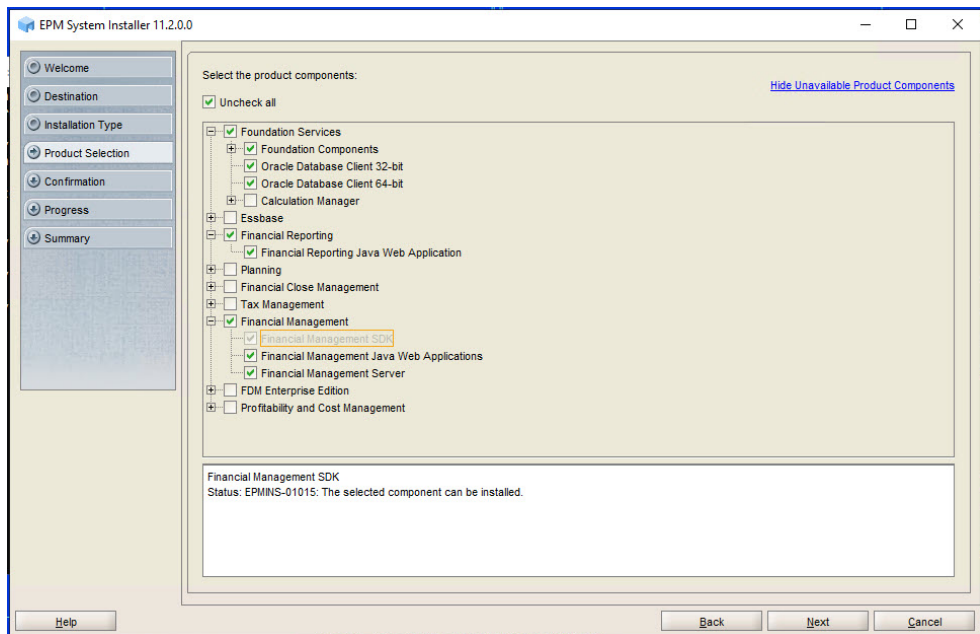
4. In **Destination** keep the default value, and then click **Next**.



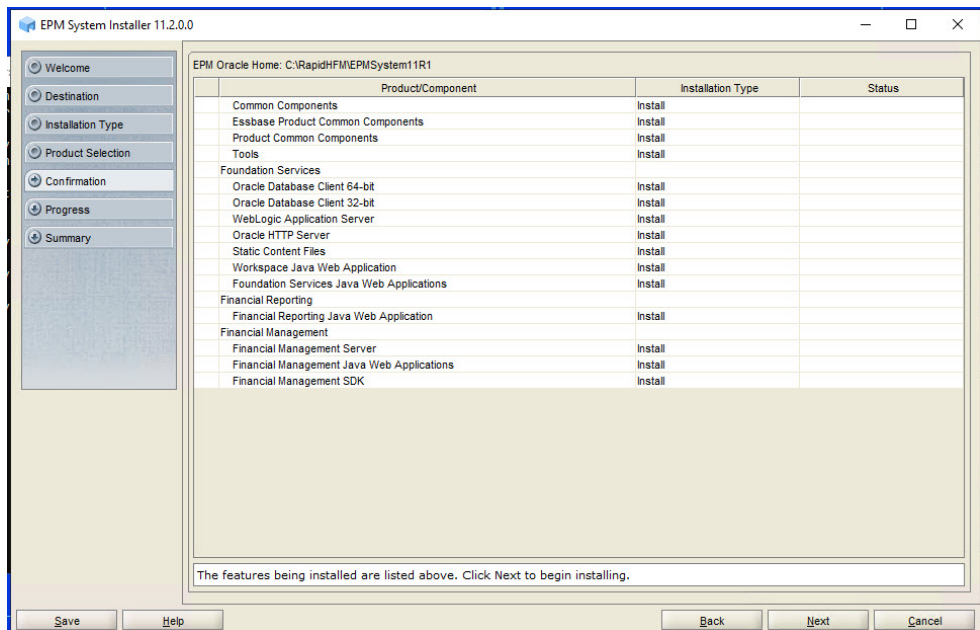
5. In **Installation Type**, ensure that **New installation** is selected, and then select **Next**.



6. In **Product Selection**, clear (uncheck) **Uncheck all**, make the following selections, and then click **Next**:
  - a. Under **Foundation Services**, select **Foundation Components**, **Oracle Database Client 32-bit**, **Oracle Database Client 64-bit**.
  - b. Under **Financial Reporting**, select **Financial Reporting Java Web Application**.
  - c. Under **Financial Management**, select all Financial Management components.

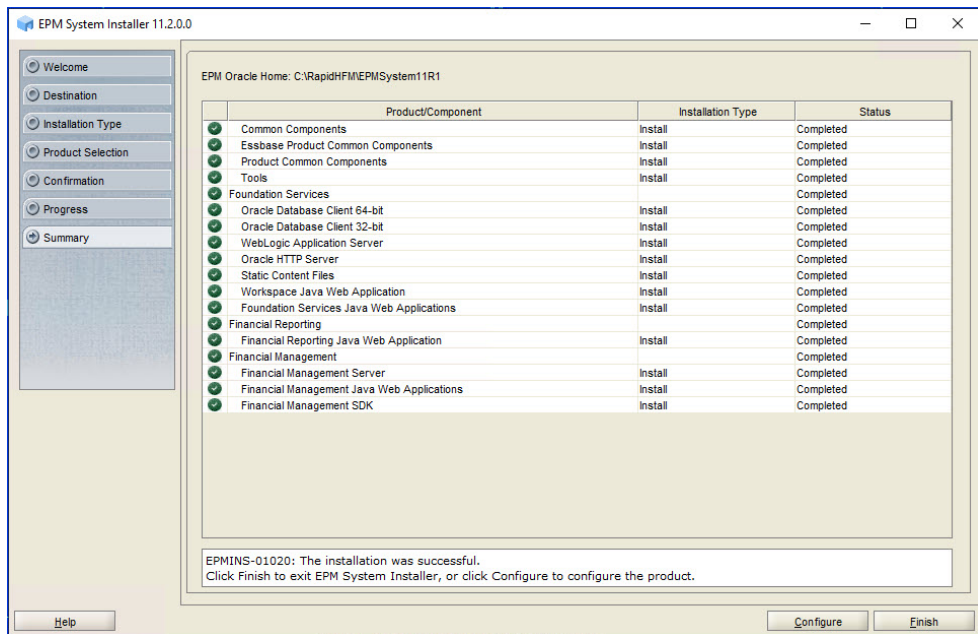


7. In **Confirmation**, click **Next**.



8. In **Progress**, monitor the installation status

9. In **Summary**, click **Finish**.



#### 10. Install Oracle Smart View for Office:

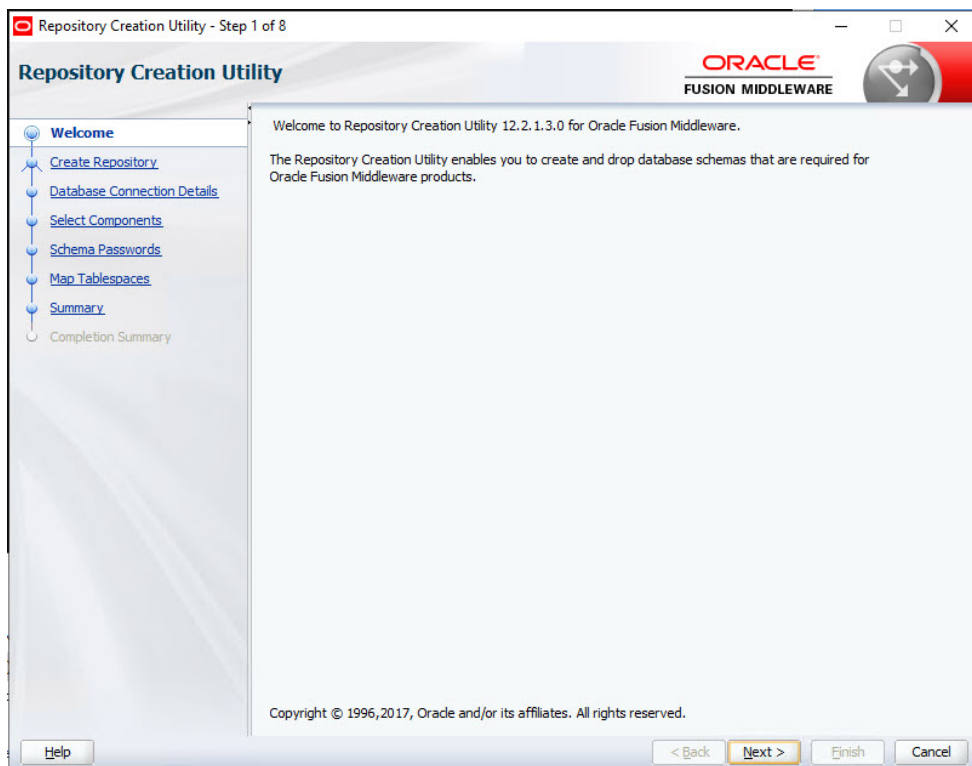
- a. Close all Microsoft Office applications.
- b. Browse to `epm_downloads`, and then double-click `SmartView.exe` to start the installation wizard.
- c. Select a destination folder for Smart View, and then click **OK**.
- d. When installation is complete, click **OK**.

## Step 4: 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.

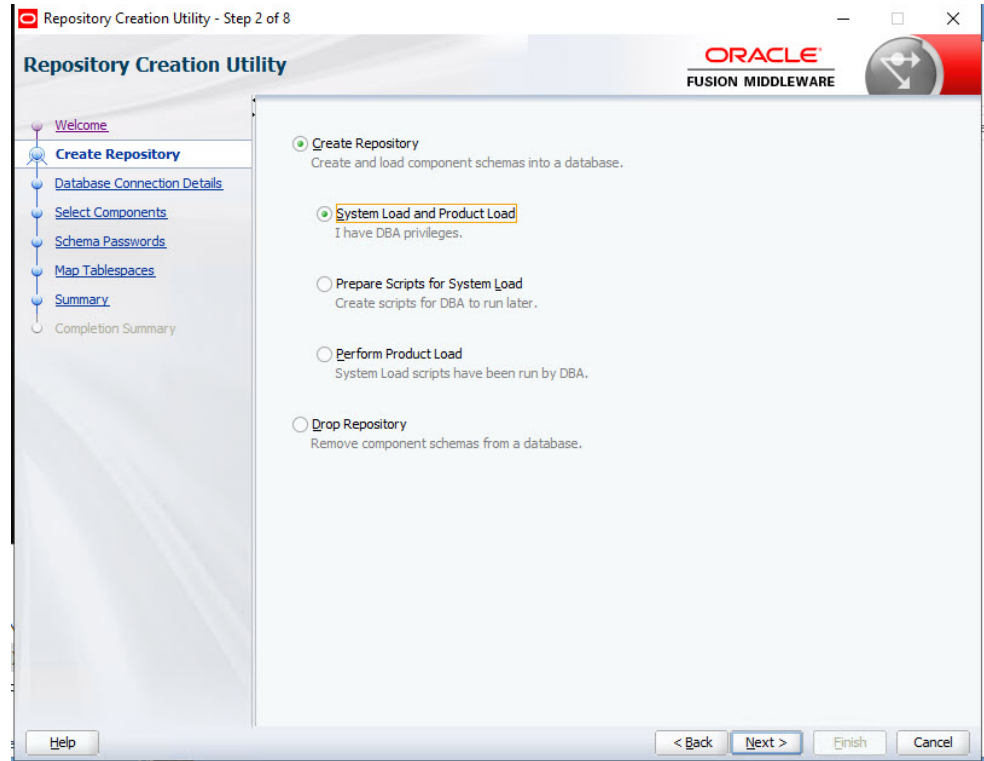
To run RCU and update RCU schema properties:

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

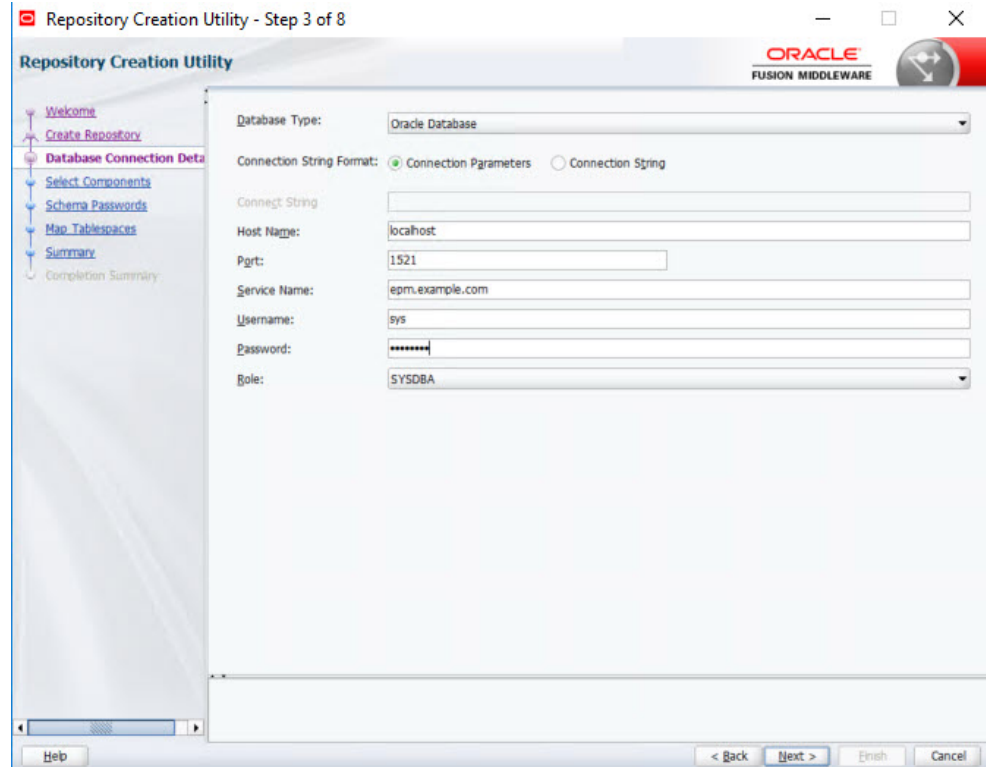


3. In **Create Repository**, ensure that **Create Repository** and **System Load and Product Load** are selected, and then click **Next**.

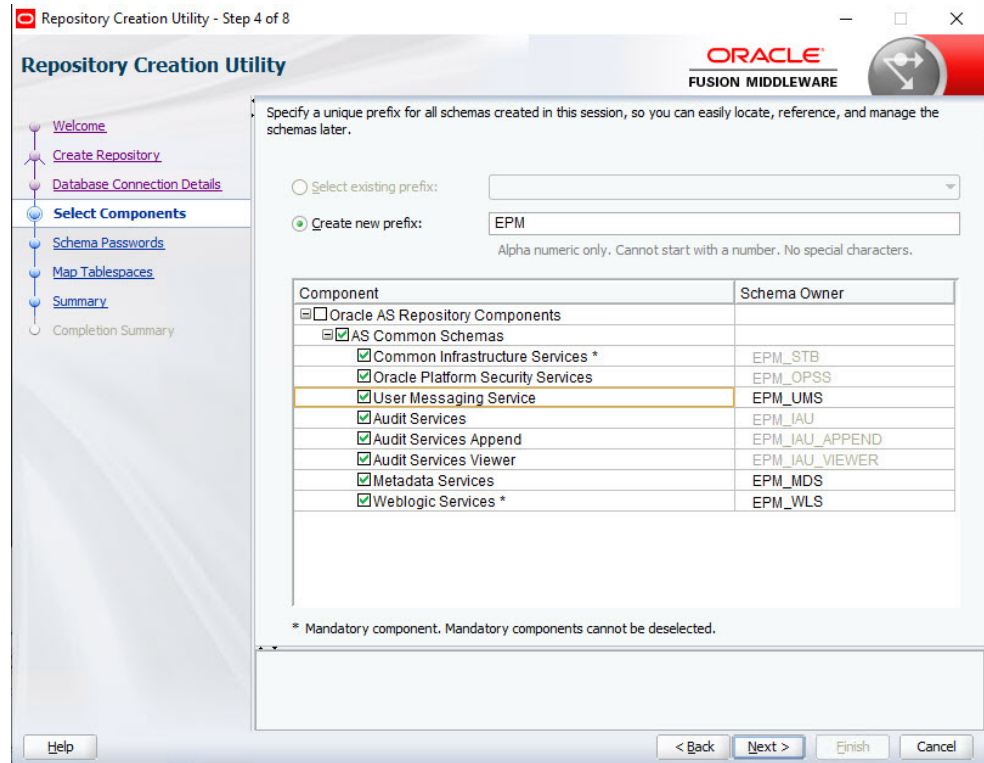




4. On the **Database Connection Details** page, specify the host, port, fully qualified service name, a user with DBA or SYSDBA, privileges, such as `sys`, and password, and then click **Next**. When the prerequisite check is completed, click **OK**.

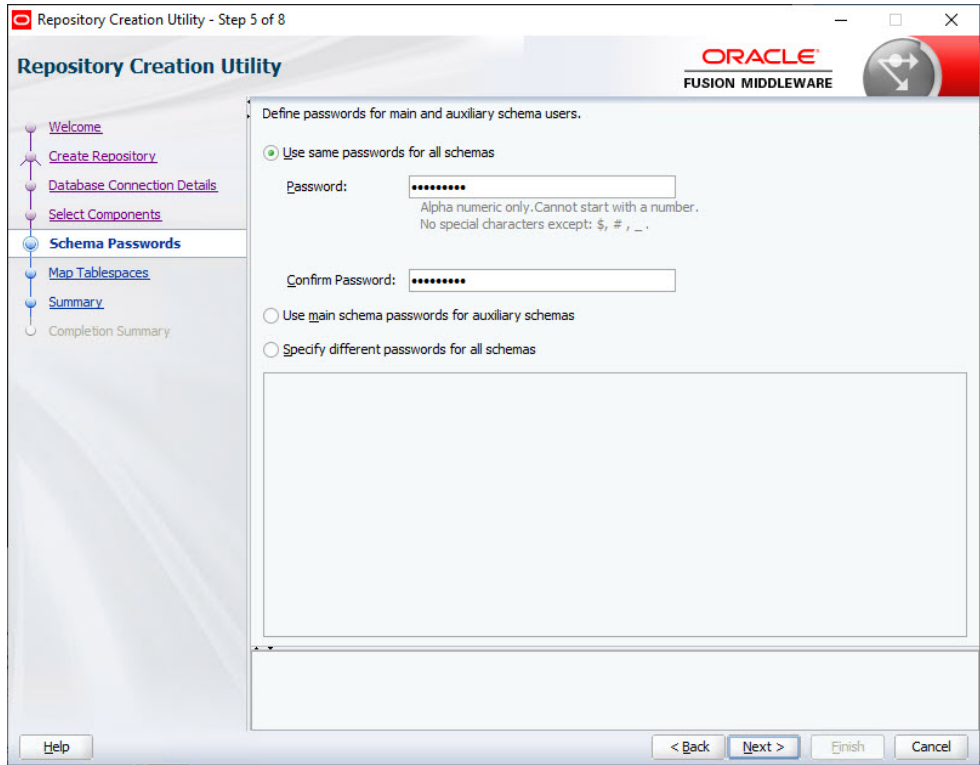


5. On the **Select Components** page, perform these tasks, and then click **Next**:
  - Select **Create new prefix** and provide a prefix. Oracle recommends that you use the same prefix for the EPM System database user and for the RCU database, such as `EPM`.
  - Expand **AS Common Schemas** and select all the options.
  - Clear the selection for **Oracle Data Integrator** if **Oracle Data Integrator** is listed.

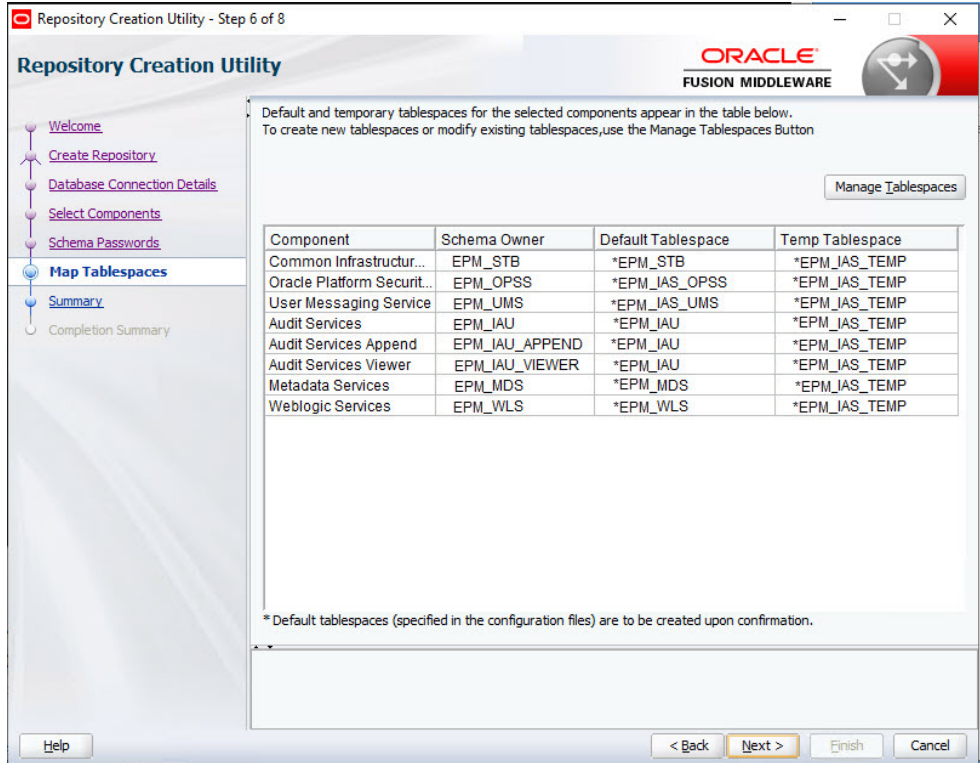


When the prerequisite check is completed, click **OK**.

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



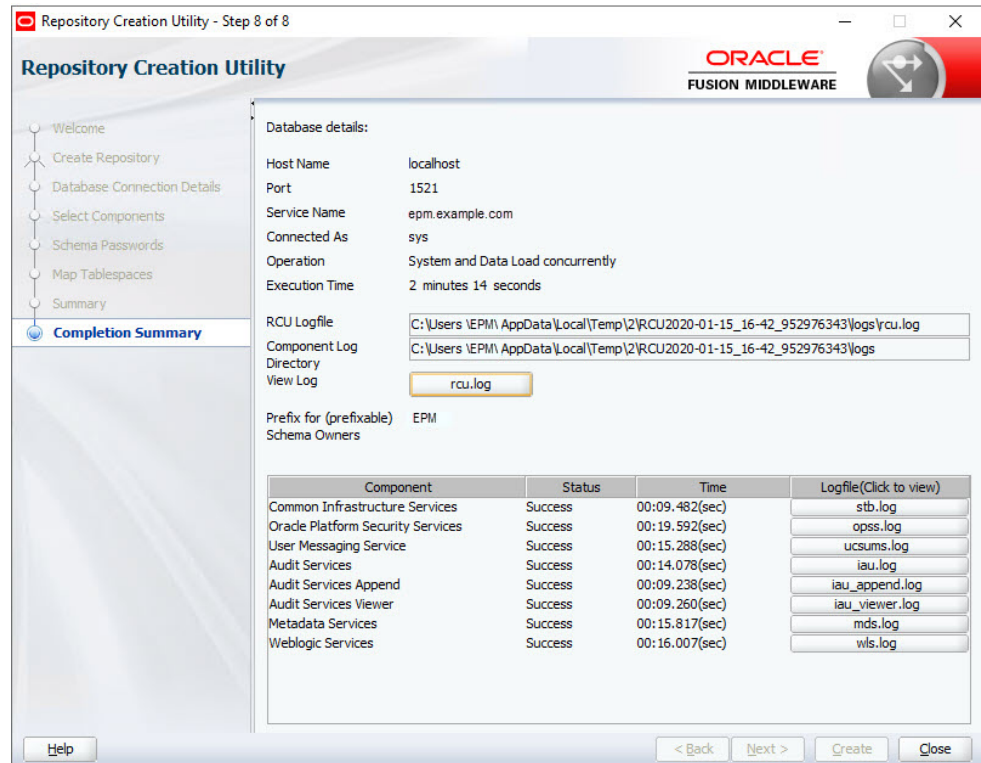
7. On the **Map Tablespaces** page, click **Next**, and then click **OK** to create tablespaces. When the prerequisite check is completed, click **OK**.



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



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



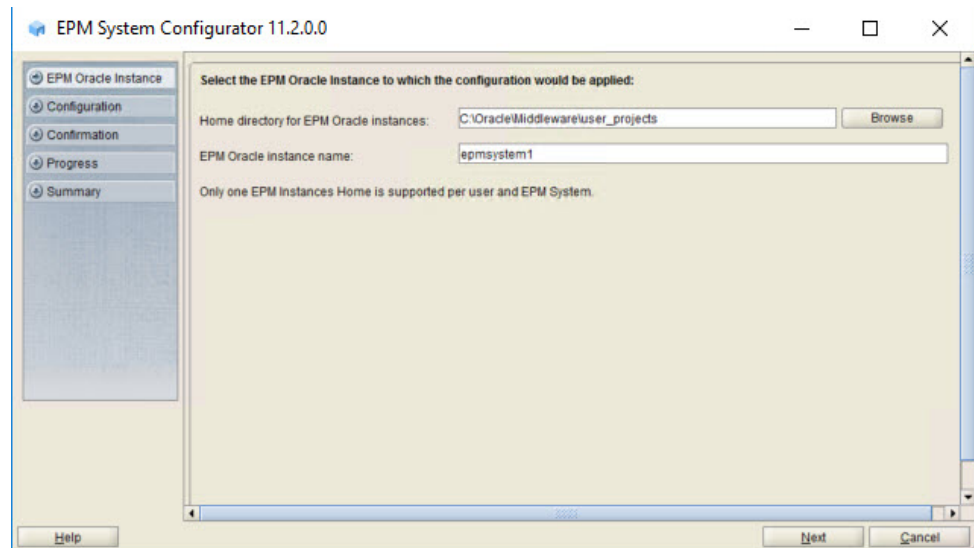
- Navigate to `C:\Oracle\Middleware\EPMSysstem11R1\common\config\11.1.2.0\RCU Schema.properties` and open it in a text editor.
- Provide the database details and then save the file.
  - sysDBAUser**—The sysdba user for RCU
  - sysDBAPassword**—The sysdba password for RCU
  - rcuSchemaPassword**—RCU schema password created while running RCU
  - schemaPrefix**—The schema prefix used to create RCU.
  - dbURL**—For example: `dbURL=jdbc:oracle:thin:@hostname:port/epm.example.com`

```
*RCUSchema.properties - Notepad
File Edit Format View Help
sysDBAPassword=welcome01
schemaPrefix=EPM
rcuSchemaPassword=welcome01
dbURL=jdbc:oracle:thin:@//localhost:1521/epm.example.com
sysDBAUser=sys
```

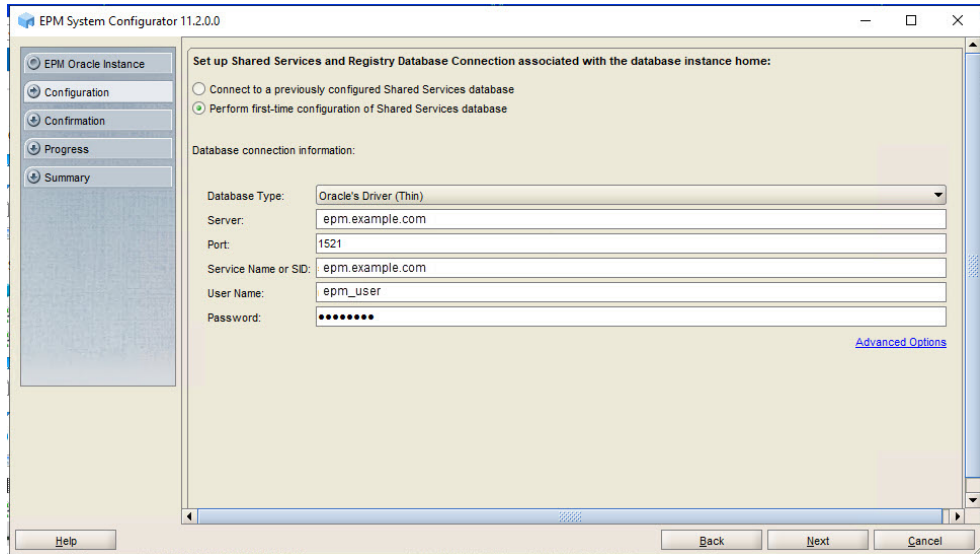
## Step 5: Configuring the Financial Management Domain

To configure the Oracle Hyperion Financial Management domain:

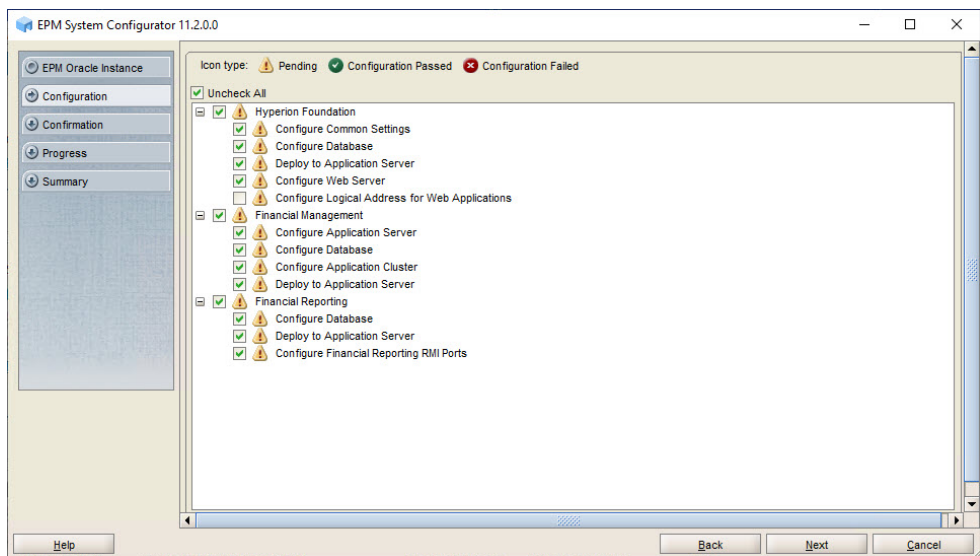
1. From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
2. In **EPM Oracle Instance**, click **Next** to use the default values.



3. In **Shared Services and Registry Database Connection**, enter the following information, and then click **Next**. Use default values for all remaining fields and selections.
  - **Service Name or SID**—Enter `epm`.
  - **User Name**—Enter `epm_user`.
  - **Password**—Enter the deployment password.

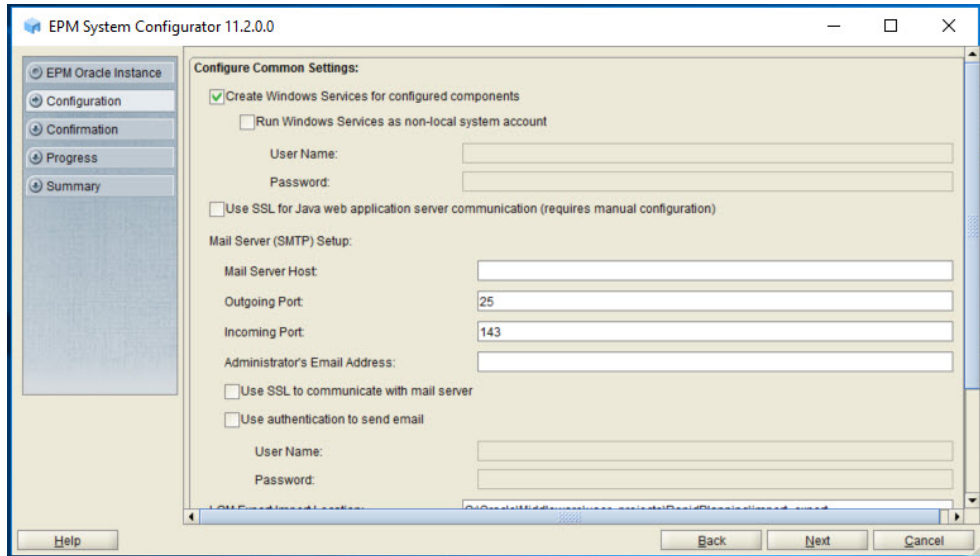


4. In **Configuration**, click **Next** to configure the selected products.

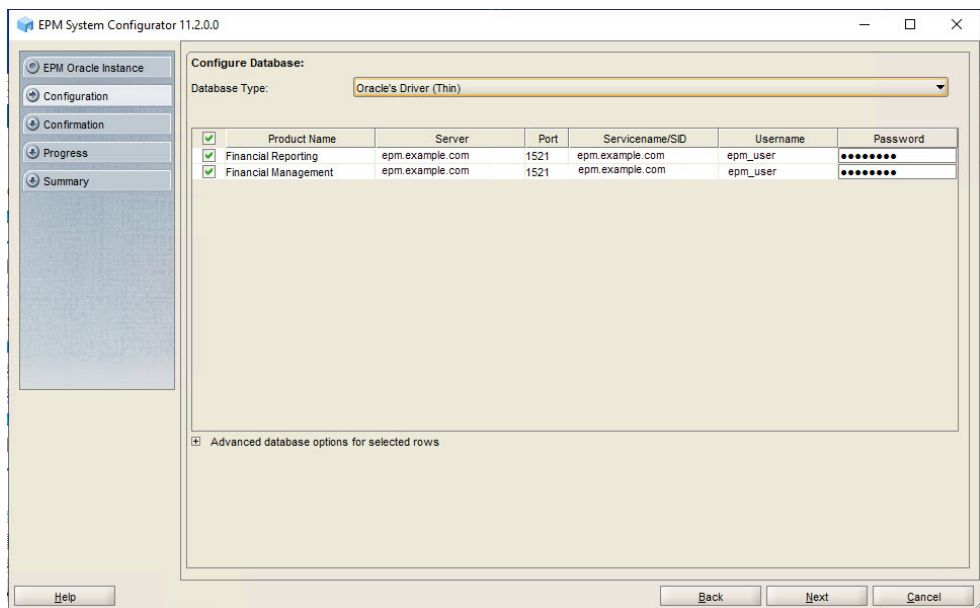


5. In **Configure Common Settings**, click **Next** to use the default values.



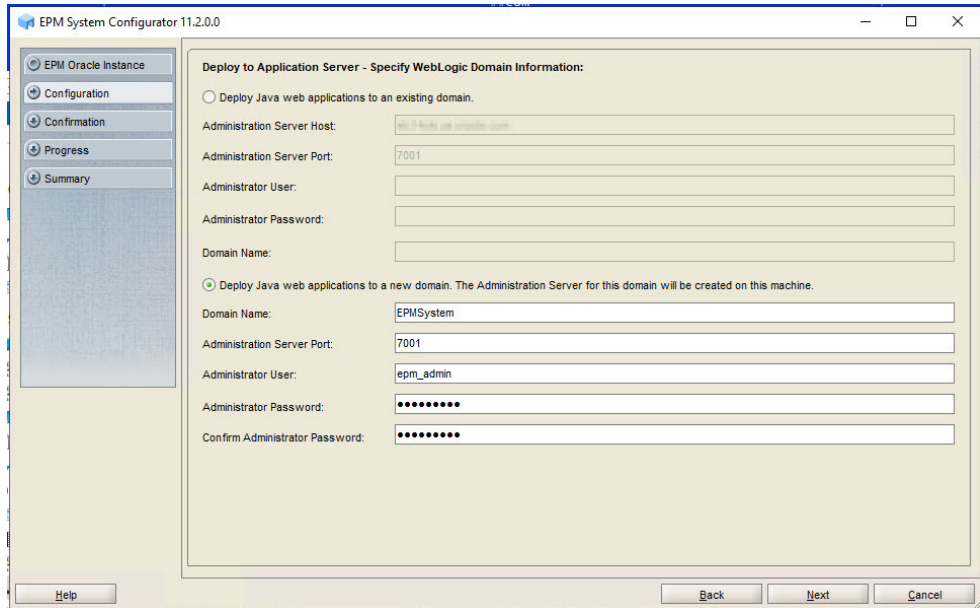


6. In **Configure Database**, click **Next** to use the default values.

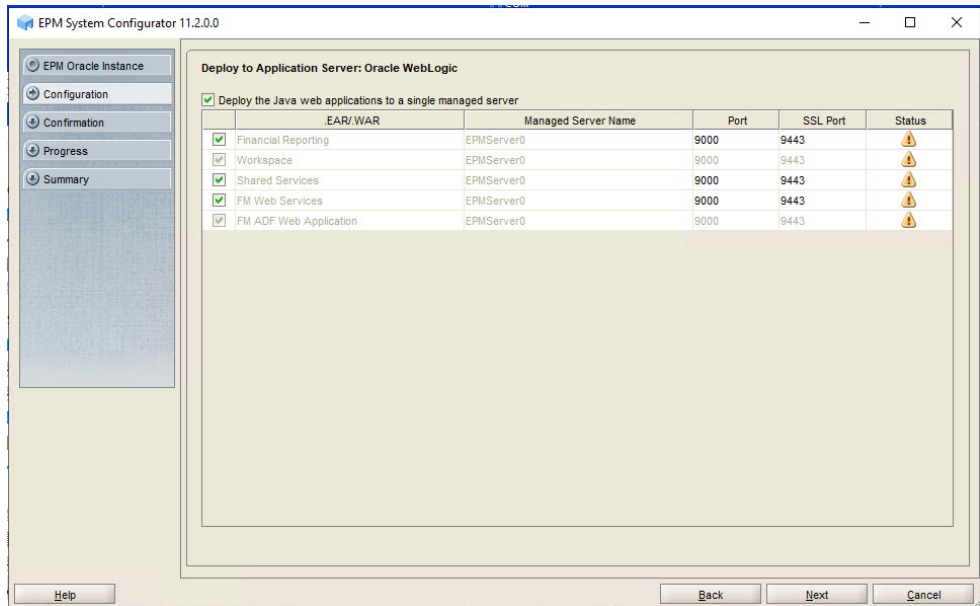


7. In **Deploy to Application Server – Specify WebLogic Domain Information**, enter the following values, and then click **Next**. Use the default values in the remaining fields.

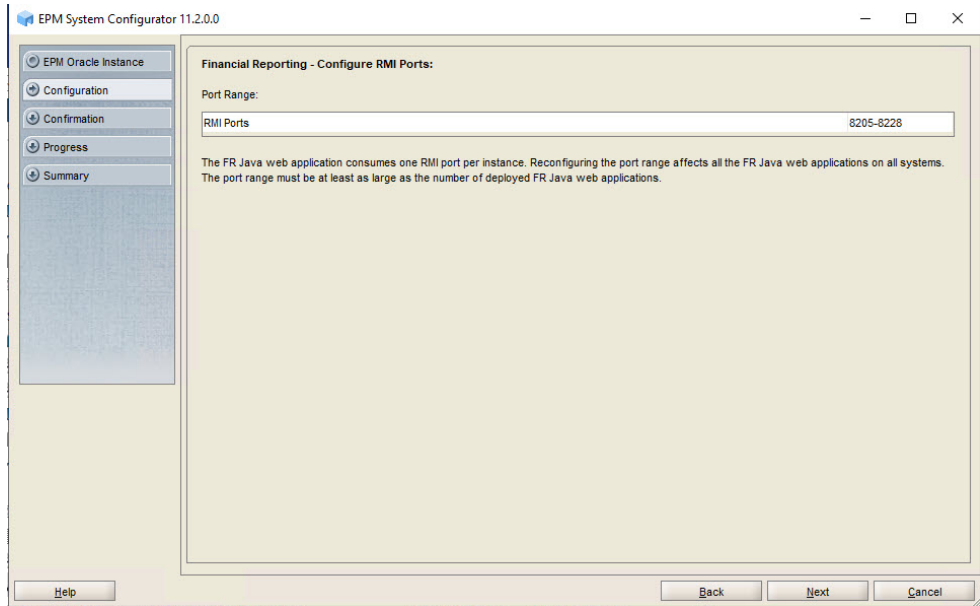
- **Administrator Password**—Enter the deployment password.
- **Confirm Administrator Password**—Reenter the deployment password.



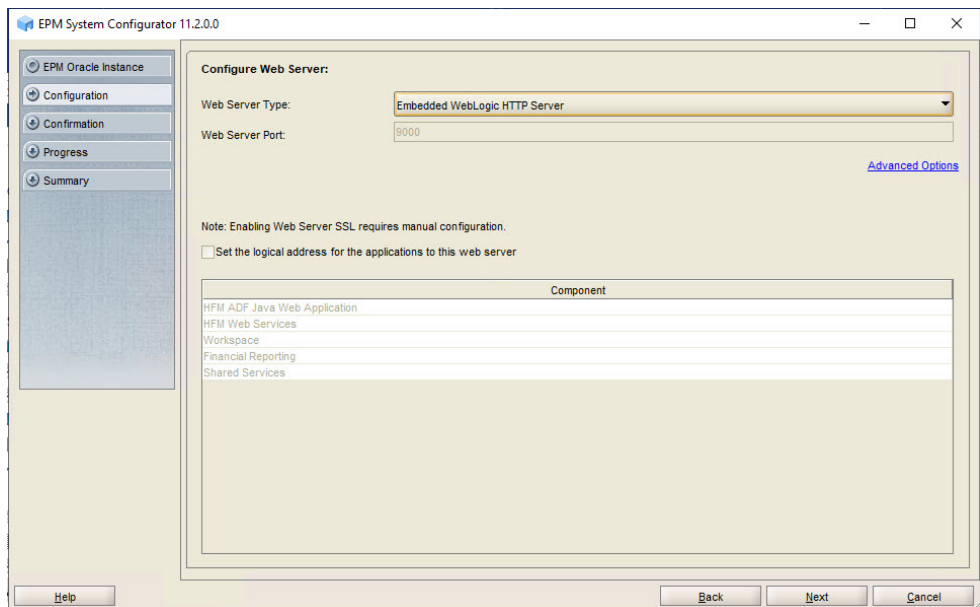
- In **Deploy to Application Server: Oracle WebLogic**, click **Next** to use the default selections.



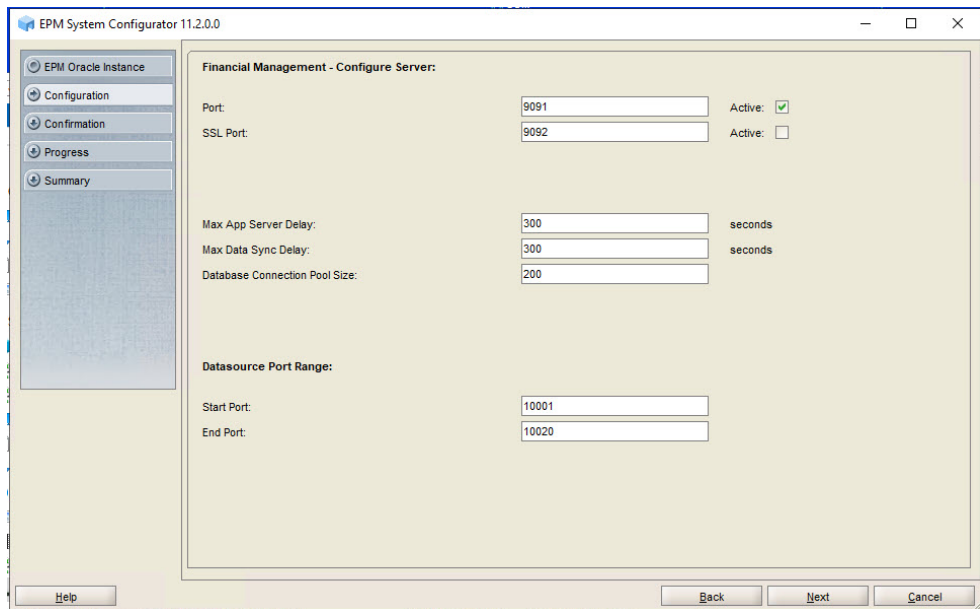
- In **Financial Reporting – Configure RMI Ports**, click **Next** to use the default values.



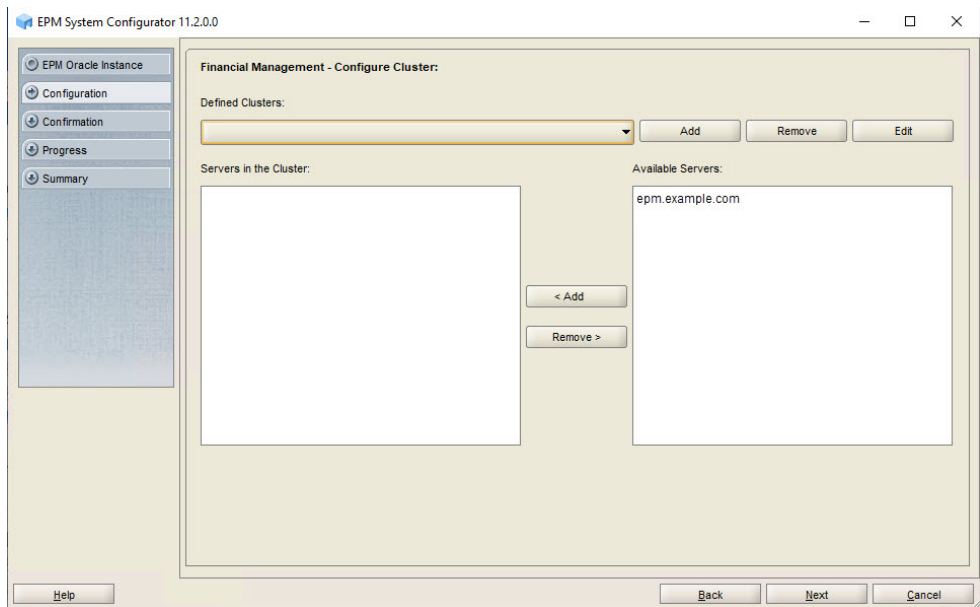
10. In **Configure Web Server**, select **Embedded WebLogic HTTP Server**, and then click **Next**.



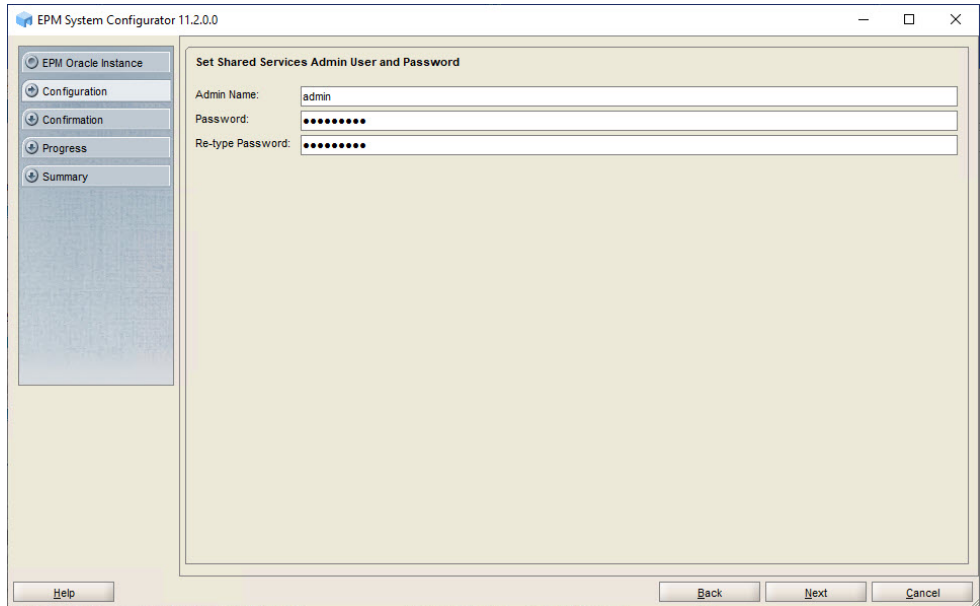
11. In **Financial Management – Configure Server**, click **Next**.



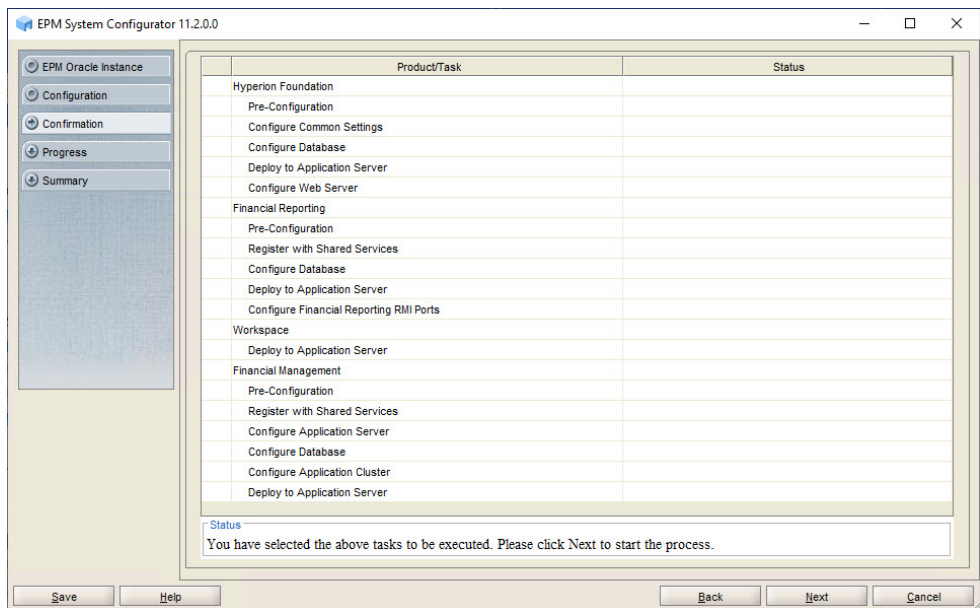
12. In **Financial Management – Configure Cluster**, click **Next**.



13. In **Set Shared Services Admin User and Password**, enter the deployment password in **Password** and **Re-type Password**, and then click **Next**.

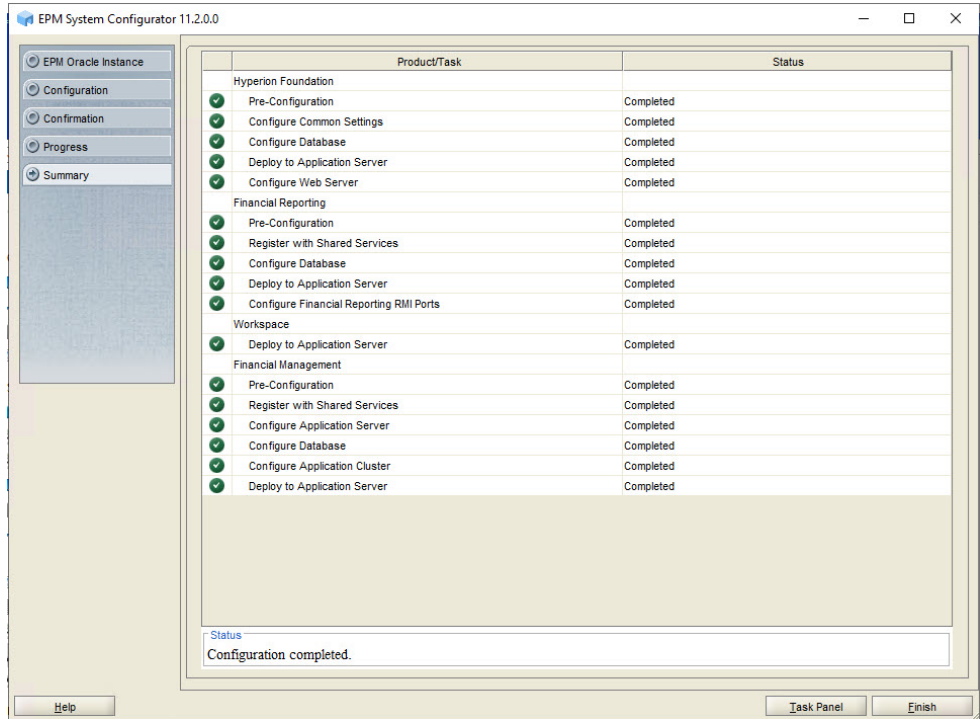


14. In **Confirmation**, click **Next** to initiate the deployment process.

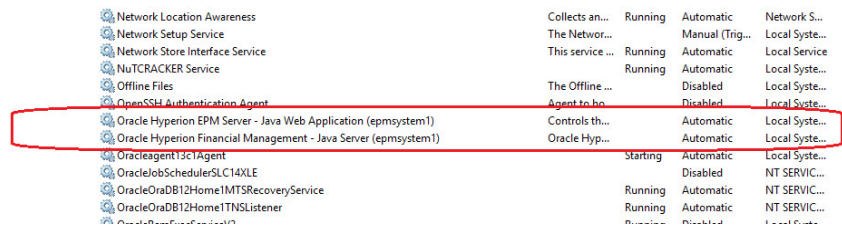


If you see an error message that .NET Framework couldn't be installed, click **Close**. This error does not affect the deployment.

15. In **Summary**, click **Finish**.



16. Start WebLogic Administration Server: Launch `C:\Oracle\Middleware\user_projects\domains\EPMSystem\bin\startWeblogic.cmd`.
17. Start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.
18. Confirm that processes are running by viewing Windows services. In **Services**, verify that the **Oracle Hyperion** services startup status match those indicated in the following screen shot:



## Step 6: Verifying Financial Management Domain Deployment

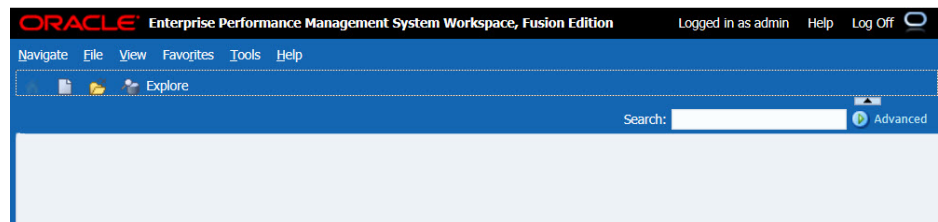
To verify Oracle Hyperion Financial Management domain deployment:

1. Run Oracle Hyperion Enterprise Performance Management System Diagnostics: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Diagnostics**.

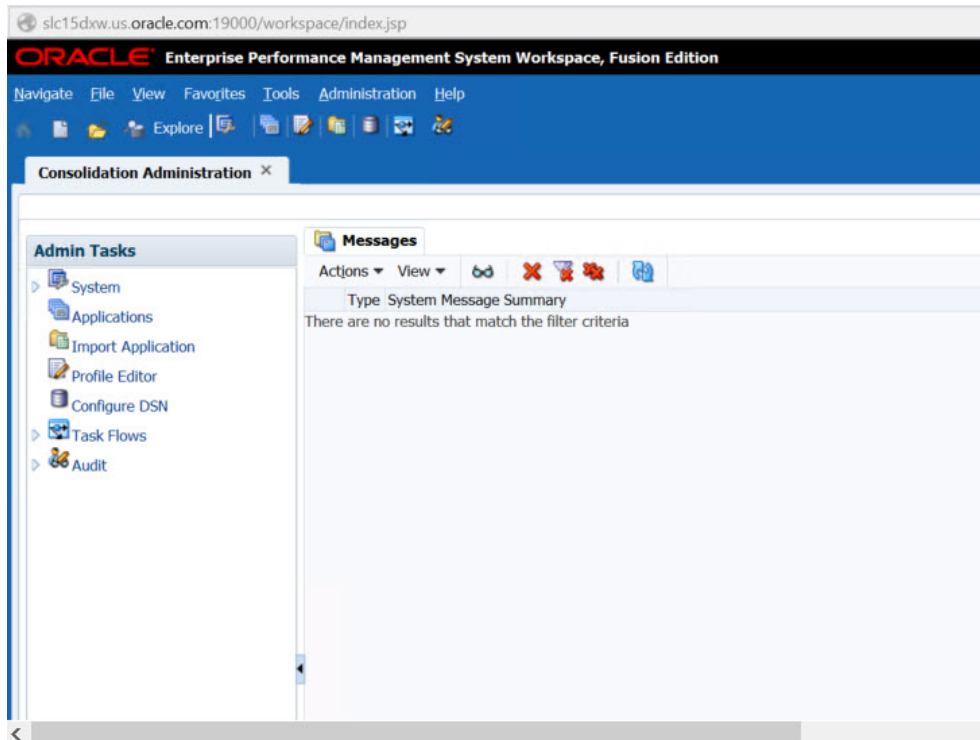
Diagnostic test results are displayed in your browser.

Text Status	Service	Text Description	Duration
PASSED	Audit	Validating that Audit has been initialized	0 seconds
PASSED	CES	Validating that CES has been initialized	0 seconds
PASSED	CFG: Configuration	Validating that configuration tasks have been completed	0 seconds
PASSED	CSS	Validating that CSS has been initialized	0 seconds
PASSED	DB: Database Connectivity	Checking connection to database jdbc:oracle:thin:@slc14k4.us.oracle.com:1521:slc14k4.us.oracle.com	0 seconds
PASSED	EXT: External Authentication	Check Native Directory external authentication provider configuration	0 seconds
PASSED	HTTP: HTTP	Checking availability of HTTP context http://slc14k4.us.oracle.com:9000/oracle-epm-fm-webservices/ApplicationService	0 seconds
PASSED	HTTP: HTTP	Checking availability of HTTP context http://slc14k4.us.oracle.com:9000/hr/status.jsp	0 seconds
PASSED	HTTP: HTTP	Checking availability of HTTP context http://slc14k4.us.oracle.com:9000/finm/finm.jsp	0 seconds
PASSED	HTTP: HTTP	Checking availability of HTTP context http://slc14k4.us.oracle.com:9000/verlapac/status	0 seconds
PASSED	HUB	Validating that HUB has been initialized	0 seconds
PASSED	WEB: Permissions	All HT entries are present in system-j2ee-data.xml	0 seconds
PASSED	LCM	Validating that LCM has been initialized	0 seconds
PASSED	Single Sign-On	Checking availability of login http://slc14k4.us.oracle.com:9000/interop/login	0 seconds
PASSED	LJK: Registry	Checking that all components in the registry have a link to host	0 seconds
PASSED	CFG: Environment	Checking whether system path variable length exceeds 2,000	0 seconds
PASSED	REG: Configuration	Checking if product has only one product node in registry	0 seconds
PASSED	Registry	Validating that Registry has been initialized	0 seconds
PASSED	WEB: Web Application	Availability of Web application context http://slc14k4.us.oracle.com:9000/interop	0 seconds
PASSED	WEB: Web Server	Checking if Web Server linked to the all Web Applications	0 seconds
EPM System Registry			
Financial Reporting			
PASSED	CFG: Configuration	Validating that configuration tasks have been completed	0 seconds
PASSED	DB: Database Connectivity	Checking connection to database jdbc:oracle:thin:@slc14k4.us.oracle.com:1521:slc14k4.us.oracle.com	0 seconds
PASSED	EXT: External Authentication	Check Native Directory external authentication provider configuration	0 seconds
PASSED	REG: Configuration	Checking if product has only one product node in registry	0 seconds
PASSED	WEB: Web Application	Availability of Web application context http://slc14k4.us.oracle.com:9000/hr/status.jsp	1 seconds
Foundation / Workspace			
PASSED	CFG: Configuration	Validating that configuration tasks have been completed	0 seconds
PASSED	LJK: Login	Module test for Financial Reporting with URL http://slc14k4.us.oracle.com:9000/verlapac/index.jsp?module=hr	0 seconds
PASSED	LJK: Login	Module test for Financial Management Web Services with URL http://slc14k4.us.oracle.com:9000/verlapac/index.jsp?module=oracle-epm-fm-webservices:oracle-epm-fm-webservices	0 seconds
PASSED	LJK: Login	Module test for Financial Management ERP Web Application with URL http://slc14k4.us.oracle.com:9000/verlapac/index.jsp?module=hr	0 seconds

2. Verify that you can access Oracle Hyperion Enterprise Performance Management Workspace and Financial Management.
  - a. From the **Start** menu, select **Oracle EPM System**, and then **Workspace URL**.
  - b. Log in to EPM Workspace:
    - **User Name**—Enter admin.
    - **Password**—Enter the *deployment password*.
  - c. Click **Log On**.



3. Select **Navigate**, then **Administer**, and then **Consolidation Administration**. Click **OK** if a warning about compatibility settings is displayed. Consolidation Administration is displayed.



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## Oracle® Hyperion Financial Management Rapid Deployment of Oracle Hyperion Financial Management in Development Environments

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