# Oracle® Enterprise Performance Management System Standard Deployment Guide



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ORACLE

Oracle Enterprise Performance Management System Standard Deployment Guide, Release 11.2

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#### **Related Topics**

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

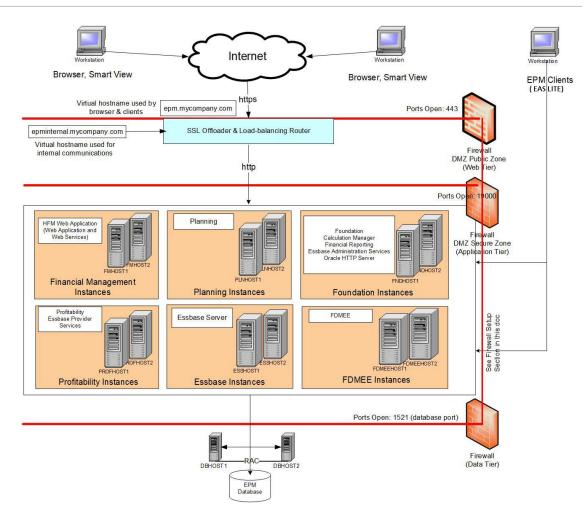
### About Standard Deployment

Oracle Enterprise Performance Management System standard deployment is Oracle's bestpractice approach for deploying EPM System products. This approach is based on creating a base deployment of the product and then scaling out the services to handle the needed capacity. This process, described using the Microsoft Windows 2016 or 2019 operating system and Oracle database 12*c*, Release 2, applies to all supported databases and operating systems after adjustments specific to the operating system and database being used.

### Standard Deployment Topology

The standard deployment topology is depicted in the following illustration. This deployment consists of different components that can be scaled out separately.



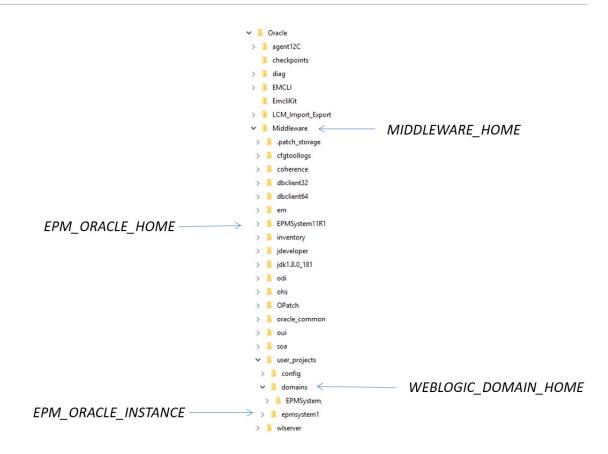


For the standard deployment, you set up a base deployment with one EPM Oracle instance for each component, validate that it is working, and then scale out each instance, depending on your high-availability and system-load requirements.

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

### **Deployment Directory Structure and Location Reference**

The following illustration shows the enterprise deployment directory structure on each server. Binaries and configuration files for each Oracle Enterprise Performance Management System component are located only on the server on which the component is installed. For example, Oracle Essbase binaries and configuration files, along with Essbase data directory (not shown in the illustration), are located on the Essbase host server (ESSHOST1 in the deployment diagram).



Data directories of EPM System products other than Essbase are located on a shared disk that must be accessible from all the servers in the deployment. Because EPM System components are not installed on the shared disk, the shared disk does not have the directory structure depicted in the illustration. The shared disk hosts data directories for:

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

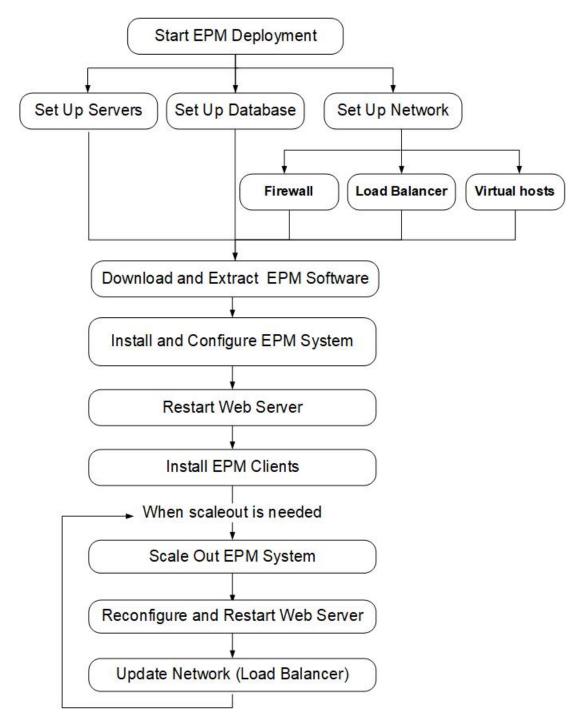
This document refers to the following installation and deployment locations:

- MIDDLEWARE\_HOME refers to the location of middleware components such as Oracle WebLogic Server, Oracle HTTP Server, Java, and, optionally, one EPM\_ORACLE\_HOME or more. The MIDDLEWARE\_HOME is defined during EPM System product installation. The default MIDDLEWARE\_HOME directory is Oracle/Middleware.
- EPM\_ORACLE\_HOME refers to the installation directory containing the files required to support EPM System products. EPM\_ORACLE\_HOME resides within MIDDLEWARE\_HOME. The default EPM\_ORACLE\_HOME is MIDDLEWARE\_HOME/ EPMSystem11R1; for example, Oracle/Middleware/EPMSystem11R1.
- EPM\_ORACLE\_INSTANCE denotes a location that is defined during the configuration process where some products deploy components. The default location is EPM\_ORACLE\_INSTANCE is MIDDLEWARE\_HOME/user\_projects/empsystem1; for example, Oracle/Middleware/user projects/empsystem1.
- *WEBLOGIC\_DOMAIN\_HOME* refers to the directory that contains the WebLogic Server domain configuration for EPM System.



### **Deployment Approach**

Oracle recommends a modular deployment approach, depicted in the following illustration, to facilitate the verification of each Oracle Enterprise Performance Management System component.



This approach simplifies troubleshooting during the setup process and facilitates configuration. The tasks that must be performed to complete each module in this deployment process are discussed in this document.



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

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

#### Note:

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



#### **Related Topics**

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

### Server Capacity Specifications

The Standard Deployment Topology defines the following EPM Oracle instances for these components. Components can be installed on these servers, which have the Microsoft Windows operating system installed. The server names indicated in this table are used throughout this document to identify specific servers or instances involved in the deployment. You can combine multiple EPM Oracle instances on a server if the server capacity supports it.

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

#### Table 2-1 Minimum Server Specifications for Standard Deployment

### Server Requirements

#### Windows Updates

For each server in the deployment, if there are any pending Windows updates, apply Windows updates and reboot before installing and configuring.

#### **Operating System Firewall**

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

#### **User Access Control**

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

To turn off user account control:

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

User Account Control Settings		_	×
User Account Control	be notified about changes to your computer helps prevent potentially harmful programs from making changes to your er Account Control settings	ur computer.	
Always notify			
-   -	Never notify me when:		
	<ul> <li>Apps try to install software or make changes to my computer</li> <li>I make changes to Windows settings</li> </ul>		
	This setting will take effect after you click OK and restart your PC.		
Never notify			
	С	Cancel	

6. Click OK.



#### Example 2-1 Clock Synchronization

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

#### Example 2-2 Shared File System Requirements

A shared file system using UNC syntax that is accessible from all the servers in the deployment is required to host these components:

- Installation files downloaded from Oracle Software Delivery Cloud
- Oracle HTTP Server configuration files
- Artifacts for Oracle Hyperion Enterprise Performance Management System Lifecycle Management in Oracle Hyperion Shared Services
- Location for Oracle Essbase Studio sample and customer data source text files
- Data directory for Oracle Hyperion Financial Data Quality Management, Enterprise Edition applications

The shared file system could be a share on a NAS/SAN or on one of the Windows servers. The deployment user must have read-write access to the shared file system. In the rest of this document, this shared location is referred to as //SharedHost/SharedLocation.

### **Client Machine Requirements**

#### **Browser Settings**

Ensure that browser preferences and options are enabled:

- For Internet Explorer and Firefox:
  - Enable JavaScript.
  - Enable cookies. The preferred setting is to allow cookies to be stored on your computer. The minimum requirement is to allow per-session level cookies.
  - Allow pop-up windows.
- Add the URL for Oracle Hyperion Enterprise Performance Management Workspace to the trusted zone:
  - 1. Select Tools, then Internet Options, and then click the Security tab.
  - 2. Select Trusted Sites, and then click Sites.
  - 3. Add the EPM Workspace URL to the list.
- For Internet Explorer, customize security settings:
  - 1. In Internet Explorer, select **Tools**, then **Internet Options**, and then the **Security** tab.
  - 2. Select the zone containing Oracle servers, and then click the **Custom level** button.
  - 3. In the Miscellaneous section, enable Access data sources across domains and Allow script-initiated windows without size or position constraints.

#### **Microsoft Office**

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



#### .NET Framework

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

#### **User Access Control**

Disable User Access Control (UAC) on each client machine during installation.

To disable UAC:

- 1. Select Start, then Control Panel, then User Accounts, then User Accounts, and then Change User Account Control settings.
- 2. In User Account Control Settings, ensure that the slider is set to Never Notify.

omputer		elps prevent potentially harmful programs from making changes to your Account Control settings
Always	s notify	1
-	-	Never notify me when:
		<ul> <li>Programs try to install software or make changes to my computer</li> </ul>
-	-	<ul> <li>I make changes to Windows settings</li> </ul>
<u></u>	-	
		Not recommended. Choose this only if you need to use programs that are not certified for Windows 7 because they do not support User Account Control.
Never	notify	

### **Deployment User Requirements**

In this section you will:

- Create a user to install and configure Oracle Enterprise Performance Management System components
- Identify a system administrator user name and password for use during configuration



#### Creating a User to Install and Configure EPM System Components

All EPM System components should be installed and configured from an administrator Windows user account (an account that does not belong to a specific user, and one that is not the Administrator) within the domain.

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

- Install, configure, and patch EPM System
- Run Windows services

Create this user account so that it satisfies the following requirements:

- The deployment user is a member of the Administrators group on the server.
- The following local security policies are assigned to the deployment user:
  - Act as part of the operating system
  - Bypass traverse checking
  - Log on as a batch job
  - Log on as a service

To view local security policy assignments on a server, select **Start**, then **Windows Administrative Tools**, and then **Local Security Policy**. In **Local Security Policy**, expand **Local Policies**, and then select **User Rights Assignment**.

⊨ ⇒   2 🖬 🗶 🗉 🛃 🖬			
Security Settings	Policy 🔺	Security Setting	
Account Policies     Local Policies     Windows Firewall with Advanced Security     Windows Firewall with Advanced Security     Network List Manager Policies     Public Key Policies     Software Restriction Policies     Application Control Policies     Local Computer     Advanced Audit Policy Configuration	Act as part of the operating system     Add workstations to domain     Adjust memory quotas for a process     Allow log on locally     Allow log on through Remote Desktop Services     Back up files and directories     Bypass traverse checking     Change the system time     Change the time zone     Create a pagefile     Create a token object	Techpubs, Administrators LOCAL SERVICE, NETWOR mkssshd, Administrators, U Administrators, Remote De Administrators, Backup Op Everyone, LOCAL SERVIC LOCAL SERVICE, Administr LOCAL SERVICE, Administr Administrators	_
	Create global objects Create permanent shared objects Create symbolic links Load and unload device drivers Lock pages in memory Lock pages in the memory Log on as a batch job	LOCAL SERVICE,NETWOR Administrators Administrators ASPNET,SQLServer2005M ASPNET,SQLServer20055	

### Identifying a System Administrator User Name and Password for Use During Configuration

You must also identify a system administrator user name and password. (You do not need to create a new user; simply identify an existing user to use.) This account, referred to as *epm\_admin* throughout this document, is used to administer Oracle WebLogic Server and



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

### **Environment Details**

Use this section to record the details for your environment.

#### Table 2-2 Deployment Environment Checklist

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

# 3 Setting Up Oracle Database

#### **Related Topics**

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

### **Database Settings**

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

- ALTER SYSTEM SET processes=2000 SCOPE=SPFILE; ALTER SYSTEM SET OPEN\_CURSORS=5000 SCOPE=SPFILE; ALTER SYSTEM SET SESSION\_CACHED\_CURSORS=200 SCOPE=SPFILE; ALTER SYSTEM SET SESSIONS=2000 SCOPE=SPFILE;
- The sqlnet.ora file in the database server (in %ORACLE\_HOME% \product\xx.x.x\dbhome\_1\network\admin\sqlnet.ora) should have the following setting: sqlnet.expire time=10
- Set the max\_string\_size setting to standard.

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

Optionally, you can specify unlimited quota for EPM schemas.

### Database Accounts for EPM System Deployment

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

- One account for EPM System Repository
- One account for a Oracle Hyperion Planning application

Each Planning application requires a separate database account. Before creating a Planning application, you must create a database account for it.

One account for a Oracle Hyperion Profitability and Cost Management application

#### Database Roles and Privileges for EPM System Accounts

- CREATE ANY SYNONYM
- CREATE CLUSTER
- CREATE INDEXTYPE
- CREATE PROCEDURE
- CREATE SEQUENCE



- CREATE SESSION
- CREATE TABLE
- CREATE TRIGGER
- CREATE TYPE
- CREATE VIEW
- DROP ANY SYNONYM

Grant privileges to users by entering the following command:

grant CREATE ANY SYNONYM, CREATE CLUSTER, CREATE INDEXTYPE, CREATE PROCEDURE, CREATE SEQUENCE, CREATE SESSION, CREATE TABLE, CREATE TRIGGER, CREATE TYPE, CREATE VIEW, DROP ANY SYNONYM to <*epm user>*;

#### **Other Settings**

- EPM System database accounts must be created in a tablespace with a minimum initial capacity of 1 GB
- Extends by 500 MB
- Auto Extend set to ON
- Minimum 1 GB temporary tablespace

### **Database Checklist**

Table 3-1	Database Checklist
Table 3-T	Dalabase Checklist

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

# 4 Setting Up Network

#### **Related Topics**

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

### **Firewall Setup**

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

Table 4-1	Default Firewall Ports for EPM System
-----------	---------------------------------------

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

<sup>1</sup> Default ports are listed.

#### Table 4-2 Financial Management Server Port

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



### Virtual Hosts Setup

Oracle Enterprise Performance Management System standard deployment topology requires a load balancer; for example, F5 BIG-IP Traffic Manager, Citrix NetScaler, or Cisco ACE A10. You must create two virtual hosts on the load balancer to support the standard deployment topology. These virtual hosts are used to receive and manage external and internal requests for EPM System resources.

#### **External Virtual Host**

Create a virtual host (epm.mycompany.com) on the load balancer as the access point for all HTTP traffic to runtime components. The traffic from browser to load balancer is always over secure socket layer (SSL). This virtual host receives all external requests (from the intranet and the Internet) on port 443 and forwards them to an Oracle HTTP Server on Oracle Hyperion Foundation Services servers (*FNDHOST1* or *FNDHOST2*).

For information on configuring the load balancer to forward external requests to Oracle HTTP Server, refer to the documentation of the load balancer you are using.

#### **Internal Virtual Host**

Standard deployment topology uses a virtual host (epminternal.mycompany.com), which is used for interprocess transactional and administrative access.

This virtual host is defined on the load balancer and is used for internal invocations of services within the data center. It is not exposed to the Internet or the intranet, and it is accessible within the data center only. It forwards requests to one of the Oracle HTTP Servers on Foundation Services servers (*FNDHOST1* or *FNDHOST2*).

For information on configuring the load balancer to forward requests to Oracle HTTP Servers, refer to the documentation of the load balancer that you are using.

### Setting Up the Load Balancer

#### Note:

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

Configure the load balancer to route requests from the virtual hosts (epm.mycompany.com and epminternal.mycompany.com) to one of the Oracle HTTP Servers on Oracle Hyperion Foundation Services servers (FNDHOST1 or FNDHOST2). These routings must be sticky.

To configure the load balancer with virtual hosts created for this deployment, refer to the instructions provided by the vendor of your load balancer.



# Downloading and Extracting EPM System Software

#### **Related Topics**

- Downloading EPM System Software
- Extracting EPM System Software

### Downloading EPM System Software

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

To download from Oracle Software Delivery Cloud:

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

Oracle Software Delivery Cloud		Nee	d Help? Contact Softw	are Delivery Custome	er Service
Add items to your Cart by choosing a Category and type in the search term or software title.					
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A list of results will appear - additional filters will then be available to refine your search.					
Click on the 'Add to Cart' link next to the title you wish to download - the software will automatically be placed in your Cart where you will ass	sign a platform	n for each	Release.		
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Still need help? Take our step-by-step Demo Tour or visit the FAQs.					
Still need help? Take our step-by-step Demo Tour or visit the FAQs.					
	Search	Clear	Popular Downloads	Download History	Teedback

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



REL: Oracle Enterprise Performance Management System - Client Installers 11.2.0.0.0	+ Add to Cart
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- 8. Review and accept the Oracle Standard Terms and Restrictions and then click **Continue**.
- 9. Use the download manager to download files: Select the check boxes next to the desired files, click Download, select a download location on the shared disk; for example, // sharedhost/sharedlocation/downloads, and then click Save. The single use download manager is saved.
- **10.** From the download location, run the executable file. Browse to save the files in to a location on the shared disk, and then click **Next**.

Name	Date modified	Туре	Size
KV266899-01.zip	2/11/2020 4:24 PM	Compressed (zipped)	570,329 KB
🚺 V839963-01.zip	2/11/2020 4:18 PM	Compressed (zipped)	2,935,517 KB
🚺 V840015-01.zip	2/11/2020 4:20 PM	Compressed (zipped)	1,944,961 KB
🚺 V980724-01.zip	2/11/2020 4:26 PM	Compressed (zipped)	1,153,246 KB
V984488-01.zip	2/11/2020 4:23 PM	Compressed (zipped)	1,144,619 KB
V984500-01.zip	2/11/2020 4:18 PM	Compressed (zipped)	2,274,811 KB
🚺 V984501-01.zip	2/11/2020 4:21 PM	Compressed (zipped)	1,813,516 KB
V984502-01.zip	2/11/2020 4:25 PM	Compressed (zipped)	1,724,355 KB
🚺 V984503-01.zip	2/11/2020 4:25 PM	Compressed (zipped)	1,607,175 KB
V984508-01.zip	2/11/2020 4:30 PM	Compressed (zipped)	3,295,938 KB
🚺 V984509-01.zip	2/11/2020 4:20 PM	Compressed (zipped)	3,494,764 KB
🚺 V984510-01.zip	2/11/2020 4:22 PM	Compressed (zipped)	1,236,055 KB
🚺 V984542-01.zip	2/11/2020 4:13 PM	Compressed (zipped)	5,786 KB



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

### Extracting EPM System Software

On the shared disk, unzip the downloaded Oracle Enterprise Performance Management System part number archives into a directory (for example, <code>epm\_unzipped</code>). Use a ZIP file extraction program that can handle long path names, such as 7-Zip. If you are prompted that any files or common components already exist, click **Yes** to overwrite the files.

After unzipping, the epm unzipped directory is similar to this screen capture.

길 appdev_patchset	i 🔐 wi	🚳 installTool-auto.cmd
\mu assemblies	ADM_version.xml	🕋 installTool-logging. xml
길 db32	AIF_version.xml	🚳 installTool-Test.cmd
🔑 db64	APS_version.xml	🚳 NativeCall.dll
길 deploymentwizard	ARM_version.xml	Planning_adm_version.xml
길 DisclosureManagement	ascore_version.xml	Planning_version.xml
📙 EPMAClients	CalcMgr_version.xml	product_common_components_version.xml
EssbaseAdministrationServicesConsole	DisclosureManagement_version.xml	SDM_version.xml
📙 EssbaseClient	EAS_version.xml	📓 setup. jar
📙 EssbaseStudio	epma_version.xml	🔤 sizes.xml
📙 FinancialManagementClient	epmZipNames.properties	tax_version.xml
🕌 FinancialReportingStudio	essbase_version.xml	TaxOp_version.xml
) javadocs	EssbaseJavaAPI_version.xml	TSS_version.xml
🎉 jre	EssbaseRTC_version.xml	🚳 wizard.cmd
길 maintenance	🕋 EssbaseStudio_version.xml	👜 wl_version.xml
📙 Migration	FCC_version.xml	workspace_version.xml
鷆 odi	hbi_version.xml	zipinfo_Apps-11124-amd64.properties
길 ohs_patchset	HFM_version.xml	zipinfo_ClientInstallers-11124.properties
📕 opmn_patchset	hpm_version.xml	zipinfo_Essbase-11124-amd64.properties
)) OracleInteractiveReportingClients	HSF_version.xml	zipinfo_Foundation-11124-amd64-Part1.properties
길 oui	HSS_version.xml	zipinfo_Foundation-11124-amd64-Part2.properties
길 Planning	installer_version.xml	zipinfo_Foundation-11124-amd64-Part4.properties
길 PredictivePlanning	🚳 install Tool. cmd	zipinfo_Foundation-11124-Part3.properties
📙 ProductionReportingRemoteClient	🖃 installTool.jar	zipinfo_OHS-11124-amd64.properties
길 Smartview	installTool.lang	
길 StrategicFinanceClient	InstallTool.properties	



## Installing and Configuring EPM System

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

### Prerequisites

Before you start, ensure that you have the following:

- · Required servers and the deployment user that can access them
- Database connection information (host name, port, and service name ) to use during the setup
- Database user accounts (user names and passwords) to use
- Access to shared disk

### Installing and Configuring Foundation Services on FNDHOST1

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

#### Installing Foundation Services on FNDHOST1

To install Oracle Hyperion Foundation Services on FNDHOST1:

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





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

EPM System Installer 11	.2.15.0.000 - 🗆
Welcome	Welcome to EPM System Installer
Destination	This program will guide you through the installation of EPM System products.
Installation Type	This program will guide you unough the installation of EPM System products.
Product Selection	Important!
Confirmation	Before installing, review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information
Progress	on system requirements and release compatibility. Also review the Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide for other information needed to plan a successful installation.
Summary	system instanation and configuration office for other information needed to plan a successful instanation.
	If you are upgrading from an earlier release, you must first perform pre-installation tasks, including exporting Shared Services
	data, before you proceed. See the Installation and Configuration Guide for details.
	Copyright © 2008, 2020, Oracle and / or its affiliates.
	This software and related documentation are provided under a license agreement containing restrictions on use and disclosure
	and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you
	may not use conv_reproduce_translate_broadcast_modify_license_transmit_distribute_exhibit_perform_nublish or display any
	EPMINS-01024: EPM System Installer successfully resolved the hostname - phoenix350270.ad1.fusionappsdephx.oraclevcn.com     EPMINS-01026: The operating system is supported - Windows Server 2022 Standard
	<ul> <li>EPMINS-01063: All environment variables prerequisites have been met.</li> </ul>
	EPMINS-01071: Oracle Inventory is not installed Failure to meet all prerequisities may result in unsatisfactory results. If you receive errors, please check the Help or documentation for more
	radice to meet an prerequisites may result in unsatisfactory results. If you receive errors, please check the rep of documentation for more information.
	1

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



EPM System Installer 11.2.1	5.0.000		×
Welcome	Enter the location of Middleware Home (spaces are not supported):	 	
Destination	C:\Oracle\Middleware Browse		
Installation Type			
Product Selection			
Confirmation			
Progress			
Summary			
	↓ ◀		
Load Help		Cance	- I com

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

🙀 EPM System Installer 11.2.	5.0.000		×
<ul> <li>Welcome</li> <li>Destination</li> <li>Installation Type</li> <li>Product Selection</li> <li>Confirmation</li> <li>Progress</li> <li>Summary</li> </ul>	Choose the install type:		
Help	<u>B</u> ack <u>N</u> ext	<u>C</u> ance	- I and -

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

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

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



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

FPM System Installer 11.2	2.15.0.000	<u>2000</u>	
EPM System Installer 11.     Welcome     Destination     Installation Type     Product Selection     Confirmation     Progress     Summary	Select the product components: Uncheck all	<u>Hide Unavailable Produ</u>	
	Image: Close Management         Image: Close Management		
	Tax Management Status: EPMINS-01015. The selected component can be installed.		

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



Destination	EPM Oracle Home: C:\Oracle\Middleware\EPMSystem11R1		
Destination	Product/Component	Installation Type	Status
Contraction of the line of the	Common Components	Install	
Installation Type	Essbase Product Common Components	Install	
The second second second second second	Product Common Components	Install	
Product Selection	Tools	Install	
	Foundation Services		
Confirmation	Calculation Manager Java Web Application	Install	
Progress	Oracle Database Client 64-bit	Install	
g ringicas	Oracle Database Client 32-bit	Install	
Summary	WebLogic Application Server	Install	
The state of the s	Oracle HTTP Server	Install	
	Static Content Files	Install	
	Workspace Java Web Application	Install	
	Foundation Services Java Web Applications	Install	
	Essbase		
	Essbase Server	Install	
	Financial Reporting		
	Financial Reporting Java Web Application	Install	
	Planning		
	Planning Java Web Application	Install	
	Financial Management		
	Financial Management Server	Install	
	Financial Management Java Web Applications	Install	
	Financial Management SDK	Install	
	FDM Enterprise Edition		
	FDM Enterprise Edition Java Web Application	Install	
	ODI	Install	
	Profitability and Cost Management		
	Profitability and Cost Management Samples	Install	
	Profitability and Cost Management Java Web Application	Install	

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

# Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1

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

- Navigate to <Local Drive>:\Oracle\Middleware\oracle\_common\bin and launch rcu.bat.
- 2. On the Welcome page, click Next.



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



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



epository Creation Utilit	у		i 💎
Wekoma Orate Repostory Database Connection Deta Select Components Schema Passwords Map Tablespaces Summary Completion Summary	Database Type: Connection String Format: Connect String Host Name: Pgrt: Service Name: Username: Dassword: Bole:	Oracle Database	

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



lity		
Specify a unique prefix for all sche schemas later.	emas created in this session, so	you can easily locate, reference, and manage th
Select existing prefix:	PH261394	
0	lense i	
Oreate new prefix:		
	Alpha numeric only. Cann	ot start with a number. No special characters.
Component		Schema Owner
and the second second second second second	v Components	
Common Infra	astructure Services *	EPM_STB
Oracle Platfor	m Security Services	EPM_OPSS
User Messag	ing Service	EPM_UMS
Audit Services	3	EPM_IAU
Audit Services	Append	EPM_IAU_APPEND
Audit Services	s Viewer	EPM_IAU_VIEWER
Metadata Ser	vices	EPM_MDS
Weblogic Ser	vices *	EPM_WLS
	ork Repository	ODI_REPO
■□Oracle Essbase		
	schemas later. Select existing prefix: Select existing prefix: Select existing prefix: Component Component Select AS Repositor AS Common Infr Oracle Platfor User Messag Audit Services Audit Services Audit Services Metadata Sen Weblogic Ser Select At Audit Services Metadata Sen Weblogic Ser	Select existing prefix:       PH261394            • Greate new prefix:       EPM Alpha numeric only. Cannot an experiment of the second s

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.

epository Creation U	p 5 of 8 tility			
Welcome	Define passwords for ma	ain and auxiliary schema users.		
Create Repository	Use same passwords	s for all schemas		
Database Connection Details	Password:			
Select Components		Alpha numeric only.Cannot start with a numb No special characters except: \$, # ,	ber.	
Schema Passwords     Map Tablespaces				
Summary	<u>C</u> onfirm Password:	•••••		
Completion Summary		sswords for auxiliary schemas		
	Specify different pase	sswords for all schemas		

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

Select Components         Component         Schema Owner         Default Tablespace         Temp Tablespace	Repository Creation U	unty		FUSION M	
Schema Passwords         Component         Schema Owner         Default Tablespace         Temp Tablespace           Map Tablespaces         Common Infrastructur         EPM_STB         *EPM_STB         *EPM_IAS_DPSS         *EPM_IAS_TEMP           Summary         Oracle Platform Securit         EPM_OPSS         *EPM_IAS_UMS         *EPM_IAS_TEMP           Audit Services         EPM_LAU         *EPM_IAU         *EPM_IAS_TEMP           Audit Services         EPM_IAU         *EPM_IAU         *EPM_IAS_TEMP           Audit Services Viewer         EPM_IAU_VIEWER         *EPM_IAU         *EPM_IAS_TEMP           Audit Services         EPM_IADS         *EPM_IAS_TEMP         *EPM_IAS_TEMP	<u>Create Repository</u> <u>Database Connection Details</u>				
Map Tablespaces         Common Infrastructur         EPM_STB         *EPM_STB         *EPM_IAS_TEMP           Oracle Platform Securit         EPM_OPSS         *EPM_IAS_OPSS         *EPM_IAS_TEMP           User Messaging Service         EPM_UMS         *EPM_IAS_UMS         *EPM_IAS_TEMP           Audit Services         EPM_IAU         *EPM_IAS_TEMP           Audit Services Append         EPM_IAU         *EPM_IAS_TEMP           Audit Services Siewer         EPM_IAU_VIEWER         *EPM_IAU           Metadata Services         EPM_IADS         *EPM_IAU	2. Contract entret in the contract of the cont	Component	Schema Owner	Default Tablespace	Temp Tablespace
Summary         User Messaging Service         EPM_UMS         *EPM_IAS_UMS         *EPM_IAS_TEMP           Completion Summary         Audit Services         EPM_IAU         *EPM_IAU         *EPM_IAS_TEMP           Audit Services Append         EPM_IAU         *EPM_IAU         *EPM_IAS_TEMP           Audit Services Viewer         EPM_IAU_APPEND         *EPM_IAU         *EPM_IAS_TEMP           Audit Services Viewer         EPM_IAU_VIEWER         *EPM_IAU         *EPM_IAS_TEMP           Metadata Services         EPM_MDS         *EPM_MDS         *EPM_IAS_TEMP		Common Infrastructur		*EPM_STB	*EPM_IAS_TEMP
Audit Services         EPM_IAU         *EPM_IAU         *EPM_IAU           Audit Services Append         EPM_IAU_APPEND         *EPM_IAU         *EPM_IAS_TEMP           Audit Services Viewer         EPM_IAU_VIEWER         *EPM_IAU         *EPM_IAS_TEMP           Audit Services Viewer         EPM_IAU_VIEWER         *EPM_IAU         *EPM_IAS_TEMP           Metadata Services         EPM_MDS         *EPM_IAS_TEMP	Summary				
Audit Services Append         EPM_IAU_APPEND         *EPM_IAU         *EPM_IAS_TEMP           Audit Services Viewer         EPM_IAU_VIEWER         *EPM_IAU         *EPM_IAS_TEMP           Metadata Services         EPM_MDS         *EPM_MDS         *EPM_IAS_TEMP					
Audit Services Viewer         EPM_IAU_VIEWER         *EPM_IAU         *EPM_IAS_TEMP           Metadata Services         EPM_MDS         *EPM_MDS         *EPM_IAS_TEMP	Completion Summary			and the second sec	
Metadata Services EPM_MDS *EPM_MDS *EPM_IAS_TEMP					
				-	
* Default tablespaces (specified in the configuration files) are to be created upon confirmation.		* Default tablespaces (specifi	ed in the configuration files	i) are to be created upon co	nfirmation.

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

epository Creation U	tility				
Welcome	Database details:				
Create Repository	Host Name	localhost			
Database Connection Details	Port	1521			
Select Components	Service Name	epm.example.com	n		
Schema Passwords	Connected As	sys			
Map Tablespaces	Operation	System and Data	Load concurrently		
Summary	Prefix for (prefixable) Schema Owners	EPM			
Completion Summary					
	Component Common Infrastructure Services	Schema Owner EPM STB	Tablespace Type Default	Tablespace Name EPM_STB	
	Common initiasi ucture services	EPM_SID	Temp Additional	EPM_IAS_TEMP [None]	
	Oracle Platform Security Services	EPM_OPSS	Default Temp Additional	EPM_IAS_OPSS EPM_IAS_TEMP [None]	
	User Messaging Service	EPM_UMS	Default Temp Additional	EPM_IAS_UMS EPM_IAS_TEMP [None]	
	Audit Services	EPM_IAU	Default Temp Additional	EPM_IAU EPM_IAS_TEMP [None]	
	Audit Services Append	EPM_IAU_APPEND	Default Temp	EPM _IAU EPM _IAS_TEMP	•
	Save Response File				



- Repository Creation Utility Step 8 of 8 X ORACLE **Repository Creation Utility** FUSION MIDDLEWARE Database details: Create Repository Host Name localhost Port 1521 Service Name Select Components epm.example.com Connected As sys System and Data Load concurrently Operation Execution Time 2 minutes 14 seconds **RCU** Loafile C:\Users \EPM\ AppData\Local\Temp\2\RCU2020-01-15\_16-42\_952976343\Jogs\rcu.log Completion Summary Component Log C: \Users \EPM\ AppData \Local \Temp \2\RCU2020-01-15\_16-42\_952976343 \Jogs Directory View Log rcu.log FPM Prefix for (prefixable) Schema Owners Status Loafile(Click to view) Component Time Common Infrastructure Services Success 00:09.482(sec) stb.log Oracle Platform Security Services 00:19.592(sec) Success opss.log 00:15.288(sec) User Messaging Service Success ucsums.log Audit Services 00:14.078(sec) Success iau.log Audit Services Append Success 00:09.238(sec) iau\_append.log Audit Services Viewer Success 00:09.260(sec) iau\_viewer.log Metadata Services Success 00:15.817(sec) mds.log Weblogic Services Success 00:16.007(sec) wls.log <Back Next > Create Close Help
- 9. On the Completion Summary page, click Close.

**10.** Navigate to <Local

Drive>:\Oracle\Middleware\EPMSystem11R1\common\config\11.1.2.0\RCUS chema.properties and open it in a text editor.

- **11**. Provide the database details and then save the file.
  - sysDBAUser—The sysdba user for RCU.
  - sysDBAPassword—The sysdba password for RCU.
  - rcuSchemaPassword—RCU schema password created while running RCU.
  - schemaPrefix—The schema prefix used to create RCU.
  - schemaPrefixEssbase The schema prefix used to create RCU for Essbase.
  - **dbURL** The database URL.
  - dbURLEssbase— The database URL for Essbase.

See Updating RCU Properties .



	RCUSche	ma.properties.txt	×	+	
File	Edit	View			
sysDi rcuS schei dbUR schei	chemaPa maPrefi L=jdbc: maPrefi	ord=********* ssword=*******	localhos		

## Configuring Foundation Services on FNDHOST1

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

🙀 EPM System Configurator 1	1.2.15.0.000			<u> </u>		×	
EPM System Configurator 1     EPM Oracle Instance     Configuration     Configuration     Progress     Summary	1.2.15.0.000 Select the EPM Oracle Instance to which the Home directory for EPM Oracle instances: EPM Oracle instance name: Only one EPM Instances Home is supported per us	C:\Oracle\Middleware\user_projects		Brows		×	
	4						
Help			Next		<u>Cancel</u>		

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

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



) EPM Oracle Instance	Set up Shared Service	s and Registry Database Connection associated with the database instance home:		
Configuration Confirmation Progress		aly configured Shared Services database figuration of Shared Services database mmation:		
Summary	Database Type:	Oracle's Driver (Thin)		
	Server: Port:	epm.example.com 1521		
	Service Name or SID: User Name:	epm_user		
	Password:	••••••	Advanc	ed Option

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



		 	-
EPM Oracle Instance	Icon type: 👍 Pending 🔮 Configuration Passed 💈 Configuration Failed		
Configuration	Check All		
	🛛 🕞 🗹 🚯 Hyperion Foundation		
Confirmation	Configure Common Settings		
Progress	🔽 👍 Configure Database		
	🔽 👍 Deploy to Application Server		
Summary	🔽 🔥 Configure Web Server		
	🔽 🥼 Configure Logical Address for Web Applications		
	🗉 🗹 👍 Calculation Manager		
	E V A FDM Enterprise Edition		
	Configure Database		
	V Application Server		
	Essbase		
	Configure Essbase Server		
	Financial Management		
	✓ ④ Configure Application Server ✓ ④ Configure Database		
	Onfigure Database      A Configure Application Cluster		
	Configure Application Cluster		
	Upgrade Applications		
	E V A Planning		
	V A Configure Database		
	Deploy to Application Server		
	Configure RMI Server		
	E V A Profitability and Cost Management		
	V A Configure Database		
	Deploy to Application Server		
	😑 🗹 🔥 Financial Reporting		
	Configure Database		
	Peploy to Application Server		
	🖌 🖉 🚯 Configure Financial Reporting RMI Ports		
			j
Help	Back Next	Canc	-

- 5. In Configure Common Settings, complete these actions, and then click Next.
  - a. Select Run Windows Services as non-local system account.
  - b. In User name, enter the deployment user.
  - c. In Password, enter the deployment user password.
  - d. In LCM Export/Import Location, enter the shared disk directory location; for example: //sharedHost/sharedLocation/lcm\_export\_import, which will store the Oracle Hyperion Enterprise Performance Management System Lifecycle Management artifacts that will be exported from or imported into this Oracle Hyperion Foundation Services instance. EPM System Configurator creates this directory for you.
  - e. Optional: Enter SMTP mail server information.

EPM System Configurato	r 11.2.15.0.000	-	 - ×
EPM Oracle Instance	Configure Common Settings:		 
Configuration	Create Windows Services for configured com	ponents	
Confirmation	Run Windows Services as non-local sys	tem account	
Progress	User Name:	myDomain\deployment_user	
Summary	Password	•••••	
	Use SSL for Java web application server com	nunication (requires manual configuration)	
	Mail Server (SMTP) Setup:		
	Mail Server Host:		
	Outgoing Port:	25	
		143	
	Incoming Port:	143	
	Administrator's Email Address:		
	Use SSL to communicate with mail server		
	Use authentication to send email		
	User Name:		
	Password:		
	LCM Export Import Location:	C: \Oracle\Middleware\user_projects\epmsystem1\import_export	

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

) EPM Oracle Instance	Configure Database:					
Configuration	Database Type:	Oracle's Driver (Thin)				-
Confirmation						
A REAL PROPERTY OF THE REAL PR	Product Name	Server	Port	Servicename/SID	Username	Password
Progress	Financial Reporting	epm.example.com	1521	epm.example.com	epm_user	•••••
STATEMENT CONTRACTOR	Profitability and Cost Ma	nag epm.example.com	1521	epm.example.com	epm_user	•••••
Summary	Financial Close Manager	nent epm.example.com	1521	epm.example.com	epm_user	•••••
	Tax Management	epm.example.com	1521	epm.example.com	epm_user	•••••
	Calculation Manager	epm.example.com	1521	epm.example.com	epm_user	•••••
	Planning	epm.example.com	1521	epm.example.com	epm_user	•••••
	Financial Management	epm.example.com	1521	epm.example.com	epm_user	•••••
	FDM Enterprise Edition	epm.example.com	1521	epm.example.com	epm_user	•••••
	Advanced database option					

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

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

- a. In Administrator User, enter the user name of WebLogic Server domain administrator using the system administrator user name you identified.
- b. In Administrator Password and Confirm Administrator Password, enter the password for WebLogic Server administrator, using the system administrator password you identified.

Deploy to Application Server - 3	Specify WebLogic Domain Information:	
O Deploy Java web applications to	o an existing domain.	
Administration Server Host:	phoenix350270.ad1 .fusionappsdephx.oraclevcn.com	
Administration Server Port:		
Administrator User:		
Administrator Password:		
Domain Name:		
Deploy Java web applications to	o a new domain. The Administration Server for this domain will be created on this machine.	
Domain Name:	EPMSystem	
Administration Server Port:	7001	
Administrator User:	epm_admin	
Administrator Password:	•••••	
Confirm Administrator Password:	•••••	
	Administration Server Host: Administration Server Port: Administrator User: Administrator Password: Domain Name: <ul> <li>Deploy Java web applications to Domain Name: Administration Server Port: Administrator User: Administrator User:</li> </ul>	Administration Server Port:       7001         Administrator User:

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

CONTRACTOR NUMBER OF BOSIS OF BUILDING	Deploy the Java web applications to a s     EAR/.WAR	ingle managed server Managed Server Name	Port		
Confirmation Progress	.EAR/.WAR		Port		
Progress	Channel at Descentions		For	SSL Port	Status
Progress	Financial Reporting	EPMServer0	9000	9443	
CONTRACTOR DESCRIPTION OF THE OWNER AND THE	Workspace	EPMServer0	9000	9443	۵
Summary	Profitability	EPMServer0	9000	9443	4
	FinancialClose	EPMServer0	9000	9443	
	AccountReconciliation	EPMServer0	9000	9443	
	SDM SDM	EPMServer0	9000	9443	
	TaxProvisioning	EPMServer0	9000	9443	
	TaxOperation	EPMServer0	9000	9443	
	TSS TSS	EPMServer0	9000	9443	
	CALC CALC	EPMServer0	9000	9443	
	Shared Services	EPMServer0	9000	9443	
	✓ Planning	EPMServer0	9000	9443	
	FM Web Services	EPMServer0	9000	9443	
	FM ADF Web Application	EPMServer0	9000	9443	
	if aif	EPMServer0	9000	9443	

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

EPM Oracle Instance	Financial Reporting - Configure RMI Ports:		
Configuration	Port Range:		
Confirmation	PMI Ports	8205-822	8
Progress			
Summary	The FR Java web application consumes one RM port per instance. Reconfiguring the port range affects all the I systems. The port range must be at least as large as the number of deployed FR Java web applications.	FR Java web applications on a	M.

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

FPM System Configurator 1	1.2.15.0.000			-		×
EPM Oracle Instance     Ornfiguration     Onfiguration     Onfirmation     Progress     Summary	Configure Web Server: Web Server Type: Web Server Port: Note: Enabling Web Server SSL requir			Advar	nced Optic	
	AJF APS Account Reconciliation CALC EAS Financial Close HFM Veb Services Planning Profitability Workspace Financial Reporting	Component				
Help			Back Next		<u>C</u> ance	1.000

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



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

Configuration	Update the lo	gical address for the J	lava web applications:				
Confirmation		cal address for all the app					
Progress	Host	internal.epm.com					
THE REPORT OF THE	TIUSL.	internal.epin.com					
Summary	Port:	80					
	SSL Port:	443					
	Set the logic	cal address for each appli	lication individually to:				
	P	roduct Component	Host	Port	SSL Port	Context	
	Financial Repor	rting	internal.epm.com	80	443	hr	
	Shared Service	es	internal.epm.com	80	443	interop	
	eas		internal.epm.com	80	443	eas	
	Workspace		internal.epm.com	80	443	workspace	
	CALC		internal.epm.com	80	443	calcmgr	

12. In **Set Shared Services Admin User and Password**, enter the user name and password for EPM System administrator using the system administrator user name and password that you identified, and then click **Next**.

REPM System Configurator 11.2.15.0.00	0				-		×
EPM Oracle Instance     Set Share	ed Services Admin Use	er and Password					1
Configuration     Admin Na	me: admin						
Confirmation     Passwore	d:						1
Progress     Re-type F	Password:						
( Summary							
			 		_		•
Help			Back	Next		<u>C</u> ancel	

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



EPM Oracle Instance	Product/Task	Status	
Configuration	Hyperion Foundation		-
CONTRACTOR STREET	Pre-Configuration		
Confirmation	Configure Common Settings		
) Progress	Configure Database		
CONTRACTOR DESCRIPTION	Deploy to Application Server		.22
Summary	Configure Web Server		
	Calculation Manager		_
	Pre-Configuration		
	Register with Shared Services		
	Configure Database		
	Deploy to Application Server		
	Essbase		
	Pre-Configuration		
	Configure Essbase Server		
	Financial Close Management		
	Pre-Configuration		
	Register with Shared Services		
	Configure Database		
	Deploy to Application Server		
	Status		
	You have selected the above tasks to be executed. Please click Ne	ext to start the process.	
μ	·		

- 14. When the deployment process is complete, the **Summary** screen is displayed. Verify that all the tasks completed successfully, and then click **Finish**.
- 15. Start WebLogic Administration Server: Launch <Local Drive>:/Oracle/Middleware/ user projects/domains/EPMSystem/bin/startWeblogic.cmd.
- 16. Start EPM System: From the Start menu, select Oracle EPM System, and then Start EPM System.
- Validate the installation by logging on to Oracle Hyperion Enterprise Performance Management Workspace: From the Start menu, select Oracle EPM System, and then Workspace URL, and then click Launch Application. Or you can access the following URL:

http://FNDHOST1:19000/workspace/

**18.** Have your network administrator configure the load balancer to route all requests addressed to epm.mycompany.com and epminternal.mycompany.com to the Oracle HTTP Server installations on the Foundation Services host machine (*FNDHOST1*).

# Installing and Configuring Essbase on ESSHOST1

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



### Note:

 For all distributed and High availability (HA) environments - The Essbase Windows service cannot access a standard network share that you create. Instead, you need to mount the network share using a specified PowerShell script.

Create the following file:

```
c:\essMount.ps1
```

Replace <code>%ADMIN\_USER%</code> and <code>%ADMIN\_PASSWORD%</code> with the actual Windows Administrator User credentials:

```
$User = "%ADMIN_USER%"
$PWord = ConvertTo-SecureString -String "%ADMIN_PASSWORD%" -
AsPlainText -Force
$creds = New-Object -TypeName
System.Management.Automation.PSCredential -
ArgumentList $User, $PWord
New-SmbGlobalMapping -RemotePath \\hostname\sharename -
Credential $creds -LocalPath V:
```

Execute the following script:

```
C:\Windows\system32\WindowsPowerShell\v1.0\powershell.exe -command
"c:\essMount.ps1"
```

This will mount the specified network share as the "V:" drive, which can then be used for configuring Essbase 21c.

 When using a mounted network drive or share as the Arborpath for Essbase 21c, ensure the trailing backslash is removed; otherwise, Essbase will not be able to import or upload files correctly.
 For example:

If the network share  $\hostname\share$  is mounted as the "Z:" drive on a Windows system, the Arborpath in Essbase should be set to Z: (without the trailing backslash), not Z:\.

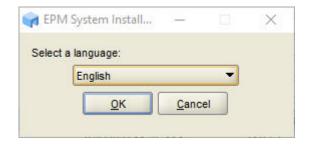
### Installing Essbase Server on ESSHOST1

To install Oracle Essbase on ESSHOST1:

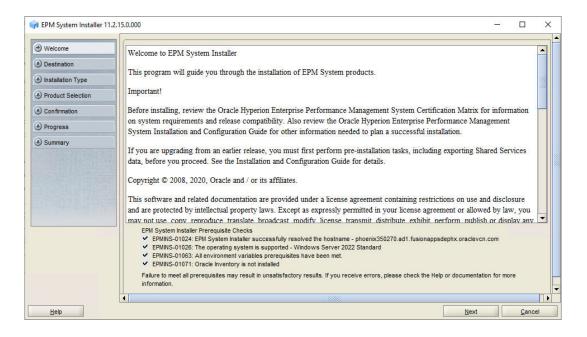
- Log on to the Essbase host machine (ESSHOST1) as the deployment user, and define a network drive (for example, z:/) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, // sharedhost/sharedlocation/downloads/epm unzipped).
- Create a local directory (not on the shared drive) to be used as the Essbase location for data (ARBORPATH). This location should be outside of the *MIDDLEWARE\_HOME* location, for example: <Local Drive>:/epm\_data.



- 3. From the mapped network drive, launch installTool.cmd.
- 4. In EPM System Installer, select a language, and then click **OK**.



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



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



EPM System Installer 11.2.	5.0.000	<u>_</u>		×
Welcome	Enter the location of Middleware Home (spaces are not supported):			
Destination	C:\OracleMiddleware Browse			
Installation Type				
Product Selection				
Confirmation				
Progress				
Summary				
Constant of the second				
	▲			
Load Help			<u>C</u> ance	I

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

🙀 EPM System Installer 11.2.1	5.0.000	<u></u>		×
Welcome     Destination     Destination     Product Selection     Ornfirmation     Progress     Summary	Choose the install type:			
Help	Back Next		<u>C</u> ance	- I stand

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

### Essbase Server under Essbase.

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



	EPM System Installer 11.2.15.0.000	$\odot$	
Welcome     Destination	Select the product components:	Hide Unavailable Product Compone	ents
Installation Type	Check all		
Product Selection	⊕ - √ Foundation Services     ⊖ - √ Essbase     √ Essbase Server		
Confirmation	Essoase Server		
Progress	Planning		
Summary	<ul> <li>⊕ - Financial Close Management</li> <li>⊕ - Tax Management</li> <li>⊕ - Financial Management</li> <li>⊕ - FDM Enterprise Edition</li> <li>⊕ - Profitability and Cost Management</li> </ul>		
	Essbase Services Status: EPMINS-01015: The selected component can be installed.		
Help	[	Back Next Canc	el.

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

🕑 Welcome	EPM Oracle Home: C:\OracleWiddleware\EPMSystem11R1		
	Product/Component	Installation Type	Status
<ul> <li>Destination</li> </ul>	Common Components	Install	
) Installation Type	Essbase Product Common Components	Install	
Installation Type	Product Common Components	Install	
Product Selection	Tools	Install	
	Foundation Services		
Confirmation	WebLogic Application Server	Install	
CONTRACTOR OF THE OWNER.	Oracle HTTP Server	Install	
Progress	Static Content Files	Install	
Summary	Workspace Java Web Application	Install	
Summary	Foundation Services Java Web Applications	Install	
	Pouridation services java web Applications		
	Pouridation services java web Applications		

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

# Creating Infrastructure Schemas Using Repository Creation Utility on ESSHOST1

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

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

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



# Configuring Essbase on ESSHOST1

- 1. On *ESSHOST1*, launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
- 2. In EPM Oracle Instance, complete these steps, and then click Next.
  - a. In **Home directory for EPM Oracle instances**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Oracle Hyperion Foundation Services (on *FNDHOST1*).
  - b. In EPM Oracle instance name, enter Essbase1.

an er möystern conngarat	or 11.2.15.0.000		- 🗆 X
EPM Oracle Instance	Select the EPM Oracle Instance to which the	he configuration would be applied:	
Configuration	Home directory for EPM Oracle instances:	C:\Oracle\Middleware\user_projects	Browse
Confirmation	EPM Oracle instance name:	Essbase1	
Progress     Summary	Och and CDM balances lines is succeeded on		
Summary	Only one EPM Instances Home is supported per	user and EPM System.	

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

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

		EPM System Configurator 11.2.15.0.000	$\odot$ $\odot$ $\otimes$
EPM Oracle Instance	Set up Shared Service	s and Registry Database Connection associated with the database instance home:	
Configuration	<ul> <li>Connect to a previous</li> </ul>	ly configured Shared Services database	
Confirmation	O Perform first-time cor	figuration of Shared Services database	
Progress	Database connection infe	ormation:	
Summary			
	Database Type:	Oracle's Driver (Thin)	-
	Server:	epm.exemple.com	
	Port:	1521	
	Service Name or SID:	epm.example.com	
	User Name:	epm_vser	
	Password:	******	
		Adva	nced Options
Help		Back Next	Cancel

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

· <b>v</b>	EPM System Configurator 11.2.15.0.000	$\odot$	×
EPM Oracle Instance	Icon type: 👍 Pending 🔮 Configuration Passed 😆 Configuration Failed		
<ul> <li>Configuration</li> </ul>	Check All		
Confirmation	₩		
Progress	<ul> <li>✓ ▲ Configure Essbase Server</li> <li>▲ Financial Management</li> </ul>		
<ul> <li>Summary</li> </ul>	Planning     Financial Reporting		
	E Financial Reporting		
Help	<u>B</u> ack <u>N</u> ext	<u>C</u> ancel	

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

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

EPM Oracle Instance	Configure Essba						
Configuration	Enable Essbase:	Ena	able APS:	Enable EAS:	$\checkmark$		
) Confirmation	Essbase Cluster Na	ame:				Assign To	Existing Cluster
) Progress	EssbaseCluster-1						
) Summary	Agent Port Number		Active:	SSL Agent Port	Number:	Active:	
	1423			6423			
	Port Range:						
	Start Port:	31768					
	End Port:	32768					
	Full wath to another						
	Full path to applicat		101				Browse
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application	n location needs to poin as in the first machines		irectory as the first s	Browse erver in the clus
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	
	C:\Oracle\Middlewa (For the second	are\user_projects\a l server in the cl	applications\essbase luster, the application			irectory as the first s	

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

	EPM System Configurator 11.2.15.0.0	00 💿 🕤	×
EPM Oracle Instance	Product/Task	Status	
Configuration	Essbase		
NAMES AND ADDRESS OF TAXABLE PARTY.	Pre-Configuration		
Confirmation	Configure Essbase Server		
Progress			
Summary			
	Status You have selected the above tasks to be executed. Please of	lick Next to start the process.	
<u>S</u> ave <u>H</u> elp		Back Next Cancel	

- 7. When the deployment process is complete, the **Summary** screen is displayed. Verify that all the tasks completed successfully, and then click **Finish**.
- 8. On *ESSHOST1*, start Oracle Enterprise Performance Management System: From the **Start** menu, select **Oracle EPM System**, and then **Start EPM System**.



# Installing and Configuring Planning on PLANHOST1

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

## Installing Planning on PLANHOST1

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

To install Planning on PLANHOST1:

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

		×
	-	
Cance	el	
	r	

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



Welcome	Welcome to EPM System Installer
Destination	Welcome to Li M System Instant
	This program will guide you through the installation of EPM System products.
Installation Type	
Product Selection	Important!
Confirmation	Before installing, review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information
0.0	on system requirements and release compatibility. Also review the Oracle Hyperion Enterprise Performance Management
Progress	System Installation and Configuration Guide for other information needed to plan a successful installation.
Summary	
	If you are upgrading from an earlier release, you must first perform pre-installation tasks, including exporting Shared Services data, before you proceed. See the Installation and Configuration Guide for details.
	data, before you proceed. See the installation and computation Guide for details.
	Copyright © 2008, 2020, Oracle and / or its affiliates.
	This software and related documentation are provided under a license agreement containing restrictions on use and disclosure
	and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use conv reproduce translate broadcast modify license transmit distribute exhibit perform publish or display any
	EPM System Installer Prerequisite Checks
	<ul> <li>EPMINS-01024: EPM System Installer successfully resolved the hostname - phoenix350270.ad1.fusionappsdephx.oraclevcn.com</li> </ul>
	<ul> <li>EPIMINS-01026: The operating system is supported - Windows Server 2022 Standard</li> <li>EDIMINS - 01023: Microsoft Server 2022 Standard</li> </ul>
	<ul> <li>EPMINS-01063: All environment variables prerequisites have been met.</li> <li>EPMINS-01071: Oracle Inventory is not installed</li> </ul>
	Failure to meet all prerequisites may result in unsatisfactory results. If you receive errors, please check the Help or documentation for more
	information.
	4

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

EPM System Installer 11.2	.15.0.000			<u></u>	×
Welcome	Enter the location of Middleware Home (spaces are not supported	:			
Destination	C:\Oracle\Middleware	Brow	se		
Installation Type					
Product Selection					
Confirmation					
Progress					
Summary					
	1				
		10000			

6. In Installation Type, click Next.



• Welcome           • Choose the install type:             • Destination           • New installation             • Product Selection           • Re-install this release             • Progress           • Summary	- 🗆 ×	<u></u>
Help Back Next	Cancel	

- 7. In **Product Selection**, perform the following tasks:
  - Clear the selection (uncheck) from **Uncheck All**.
  - Select Planning.
  - Remove the selection from (uncheck) **Essbase** and from **Calculation Manager** (under **Foundation Services**) if it is selected.

EPM System Installer 11	.2.15.0.000	- 0
Welcome	Select the product components:	Hide Unavailable Product Compon
Destination	Uncheck all	
Installation Type	Foundation Services	
Product Selection	E Foundation Components	
CONTRACTOR AND INCOME.	Oracle Database Client 32-bit	
Confirmation		
Progress	Essbase	
Summary	Financial Reporting	
	Panning	
	Planning Java Web Application     Financial Close Management	
	Tax Management	
	Financial Management	
	E FDM Enterprise Edition	
	Profitability and Cost Management	
	Planning Java Web Application	
	Status: EPMINS-01015: The selected component can be installed.	



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

Welcome	EPM Oracle Home: C:\Oracle\Middleware\EPMSystem11R1		
	Product/Component	Installation Type	Status
) Destination	Common Components	Install	
) Installation Type	Essbase Product Common Components	Install	
, motunation type	Product Common Components	Install	
Product Selection	Tools	Install	
	Foundation Services		
Confirmation	Oracle Database Client 64-bit	Install	
Progress	Oracle Database Client 32-bit	Install	
Progress	WebLogic Application Server	Install	
Summary	Oracle HTTP Server	Install	
	Static Content Files	Install	
	Workspace Java Web Application	Install	
	Foundation Services Java Web Applications	Install	
	Planning	Install	
	Planning Java Web Application	Install	
	The features being installed are listed above. Click Next to b		

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

# Creating Infrastructure Schemas Using Repository Creation Utility on PLANHOST1

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

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

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

## Configuring Planning on PLANHOST1

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



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

p er möystem conngatur.	or 11.2.15.0.000		- □ >
<ul> <li>EPM Oracle Instance</li> <li>Configuration</li> <li>Confirmation</li> <li>Progress</li> <li>Summary</li> </ul>	Select the EPM Oracle Instance to which t Home directory for EPM Oracle instances: EPM Oracle instance name: Only one EPM Instances Home is supported per	[C:\Oracle\Middleware\user_projects	Browse

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

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

		EPM System Configurator 11.2.15.0.000	$\odot$ $\odot$ $\otimes$
EPM Oracle Instance	Set up Shared Service	s and Registry Database Connection associated with the database instance home:	
Configuration	Connect to a previous	ly configured Shared Services database	
Confirmation	O Perform first-time co	ifiguration of Shared Services database	
Progress	Database connection inf	armation:	
() Summary			
C. DESTRUCTION	Database Type:	Oracle's Driver (Thin)	-
	Server:	epm.exemple.com	
	Port:	1521	
	Service Name or SID:	epm.example.com	
	User Name:	epm_user	
	Password:	•••••	
		Ad	lvanced Options
<u>H</u> elp	-	Back	Cancel

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



EPM System Configurate	or 11.2.15.0.000		×
() EPM Oracle Instance	Icon type: 🔬 Pending 🔮 Configuration Passed 🔕 Configuration Failed	 	_
Configuration	Check All		
Confirmation	B A Pyperion Foundation     FDM Enterprise Edition		
) Progress	B      Essbase     Financial Management		
9 Summary	Image: Second		

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

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

EPM Oracle Instance	Confi	gure Database:					
Configuration	Datab	ase Type:	Oracle's Driver (Thin)				•
Confirmation	1						
) Progress		Product Name Planning	epm.example.com	Port 1521	Servicename/SID epm.example.com	Username epm_user	Password
) Summary	i l'assert						
	E Ar	dvanced database option:	s for selected rows				

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

Configuration     Configu	is domain will be created on this machine.	
Progress     Administration Server Port:     Administration Server Port:     Administration Server Port:     Administrator Password     Comain Name:     Domain Name:     Deploy Java web applications to a new domain. The Administration Server for     Domain Name:     BP/D/System     Administration Server Port:     Domain Server Port:     Domain Name:     BP/D/System     Administration Server Port:     Domain Name:     Server Port:     Server Port:     Domain Name:     Server Port:     Server Port:     Server Port:     Server Port:     Server Port:     Server Port:     Server Port:	is domain will be created on this machine.	
Administrator User: epm_administrator User: epm_administrator User: Administrator User: Administrator Password:	is domain will be created on this machine	
Administrator User: epin_admin Administrator Password:   Administrator Password:  Domain Name: EPM/System  Domain Name: EPM/System  Administration Server Port:   PTIG1	is domain will be created on this machine	
Domain Name:         EPM/System           O Deploy Java web applications to a new domain. The Administration Server for         Domain Name:         Image: I	is domain will be created on this machine	
O Deploy Java web applications to a new domain. The Administration Server for     Domain Name:     Administration Server Port:     7706	is domain will be created on this machine.	
Domain Name: EPt/Dystem Administration Server Port. 7/01	is domain will be created on this machine.	
Administration Server Port.		
Administrator User: eput_admin		
Administrator Password		
Confirm Administrator Password		

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

EPM Oracle Instance	Deploy to Appli	cation Server: Oracle Wel	bLogic			
Configuration	Deploy the Ja	ve with applications to a sim	phi loanaged berver			
Confirmation		EAR/.WAR	Managed Server Name	Port	SSL Port	Status
Progress	Planning		Planning0	8300	8343	4

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



EPM System Configurator	11.2.15.0.000				
EPM Oracle Instance	Planning - Configure RMI Server			 	
Configuration	RMI Port:	11333			
Confirmation	There can be only one PMI Perietry p	rocess per system. Reconfiguring the port affects all RMI re	agietry processes on all systems		
) Progress	There can be only one rivil registry p	rocess per system. Neconiguing the port arrects all Nilline	egisti y processes on all systems.		
Summary					
	4				

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

EPM Oracle Instance	Product/Task	Status
	Planning	1
Configuration	Pre-Configuration	
Confirmation	Register with Shared Services	
Progress	Configure Database	
THE PROPERTY OF THE OWNER WATCHING	Deploy to Application Server	
Summary	Configure RMI Server	
	Salus	

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

# Installing and Configuring Financial Management on HFMHOST1

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



## Installing Financial Management on HFMHOST1

To install Oracle Hyperion Financial Management on HFMHOST1:

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

	-	
<u>Cancel</u>		
	<u>C</u> ancel	▼ <u>C</u> ancel

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

EPM System Installer 11	2.15.0.000 — — >
Welcome	Welcome to EPM System Installer
Destination     Installation Type	This program will guide you through the installation of EPM System products.
Product Selection	Important!
Confirmation	Before installing, review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information on system requirements and release compatibility. Also review the Oracle Hyperion Enterprise Performance Management
<ul> <li>Progress</li> <li>Summary</li> </ul>	System Installation and Configuration Guide for other information needed to plan a successful installation.
Junimary	If you are upgrading from an earlier release, you must first perform pre-installation tasks, including exporting Shared Services data, before you proceed. See the Installation and Configuration Guide for details.
	Copyright © 2008, 2020, Oracle and / or its affiliates.
	This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you
	Imax not use conv reproduce translate broadcast modify license transmit distribute exhibit nerform nublish or display any         EPM System Installer Prerequisite Checks         V EPMINS-01024; FDM System Installer successfully resolved the hostname - phoenix350270.ad1.fusionappsdephx.oraclevcn.com         V EPMINS-01026; The operating system is supported - Windows Server 2022 Standard         V EPMINS-01027: Oracle Inventory is not installer
	Failure to meet all prerequisites may result in unsatisfactory results. If you receive errors, please check the Help or documentation for more information.
Help	Next Cancel

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



EPM System Installer 11.2.	.15.0.000	_	×
Welcome	Enter the location of Middleware Home (spaces are not supported):		
Destination	C:\OracleMiddleware Browse		
Installation Type			
Product Selection			
Confirmation			
Progress			
Summary			
	▲		

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

🙀 EPM System Installer 11.2	15.0.000	<u></u>		×
Welcome     Destination     Installation Type     Product Selection     Confirmation     Progress	Choose the install type: New installation Re-install this release Apply Update			
Summary				
Help	Back	Next	<u>C</u> anc	el

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

### Financial Management.

When you select **Financial Management**, any required **Foundation Services** components are automatically selected.

If you are configuring on the same server on which you installed Foundation Services, the Financial Management SDK and Financial Management Java web applications are already installed.



EPM System Installer 11				- 🗆	_
) Welcome	Select the product components:				
Destination	Uncheck all		Hide Unavailable Pro	duct Compor	<u>1e</u>
) Installation Type	Foundation Services				_
Product Selection	Foundation Components     Foundation Components     Foreice Database Client 32-bit				
Confirmation	Oracle Database Client 32-bit     ✓ Oracle Database Client 64-bit				
) Progress					
) Summary	Essoase				
STREET STREET	⊕-     Planning     ⊕-     Financial Close Management				
	E Tax Management				
	Financial Management     Financial Management SDK				
	Financial Management SDK				
	Financial Management Server     FDM Enterprise Edition				
	Pom Enterprise Educin     E Pon Enterprise Educin     Pon Enterprise Educin     Pon Enterprise Educin				
	Financial Management Status: EPMINS-01015: The selected component can be installed.				
	ended, at mine-or or to to, the addeted component can be installed.				
Help		Back	Next	Cano	

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



Welcome	EPM Oracle Home: C:\Oracle\Middleware1\EPMSystem11R1		
C) Destination	Product/Component	Installation Type	Status
Oestination	Common Components	Install	
Installation Type	Essbase Product Common Components	Install	
CONTRACTOR DO NAMES AND D	Product Common Components	Install	
Product Selection	Tools	Install	
2	Foundation Services		
Confirmation	Calculation Manager Java Web Application	Install	
Progress	Oracle Database Client 64-bit	Install	
O Progress	Oracle Database Client 32-bit	Install	
Summary	WebLogic Application Server	Install	
() ( ( ( ( ( ( ( ( ( ( ( ( ( ( ( ( ( (	Oracle HTTP Server	Install	
	Static Content Files	Install	
	Workspace Java Web Application	Install	
	Foundation Services Java Web Applications	Install	
	Financial Management		
	Financial Management Server	Install	
		Install	
	Financial Management Java Web Applications Financial Management SDK		
	Financial Management Java Web Applications	Install	
	Financial Management Java Web Applications	Install	
	Financial Management Java Web Applications	Install	

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

# Creating Infrastructure Schemas Using Repository Creation Utility on HFMHOST1

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

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

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

## Configuring Financial Management on HFMHOST1

- 1. On *HFMHOST1*, launch EPM System Configurator: From the **Start** menu, select **Oracle EPM System**, and then **EPM System Configurator (all instances)**.
- 2. In EPM Oracle Instance, complete these steps, and then click Next.
  - a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Oracle Hyperion Foundation Services (on *FNDHOST1*).
  - **b.** In **EPM Oracle instance name**, enter HFM1.

EPM System Configurato			- 0
EPM Oracle Instance	Select the EPM Oracle Instance to which the	e configuration would be applied:	
Configuration	Home directory for EPM Oracle instances:	C:\Oracle\Middleware\user projects	Browse
) Confirmation	Home directory for LPM Grace instances.	-	
Progress	EPM Oracle instance name:	HFM1	
) Summary	Only one EPM Instances Home is supported per	user and EPM System.	

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

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

		EPM System Configurator 11.2.15.0.000	$\odot$	×
EPM Oracle Instance     Configuration	<ul> <li>Connect to a previous</li> </ul>	s and Registry Database Connection associated with the database instance home: ily configured Shared Services database figuration of Shared Services database		
Confirmation     Progress	Database connection inf			
<ul> <li>Summary</li> </ul>	Database Type:	Oracle's Driver (Thin)	-	
	Server: Port: Service Name or SID:	epm example com 1521 enm example com		
	User Name: Password:	epin_user		
	Password.		nced Option	15
Help		Back	<u>C</u> ancel	

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



EPM System Configurate	« 11.2.15.0.000		100		×
EPM Oracle Instance     Configuration     Configuration     Progress     Summary	Icon type:     Pending     Configuration Passed     Configuration Failed       Check All     Ministry     Ministry     Ministry       Ministry     FOM Enterprise Edition       Ministry     FOM Enterprise Edition       Ministry     Stablese       Ministry     Ministry       Ministry     Ministry				
					- COMMENT
Help		Back Nex	d II	Can	1,1,1,1,1

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

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

PM Oracle Instance	Config	gure Database:					
Configuration	Databa	ве Туре:	Oracle's Driver (Thin)				
Confirmation					1	- 124	- 54
rogress		Product Name	Server	Port	Servicename/SID	Username	Password
rogress		Financial Management	epm.example.com	1521	epm.example.com	epm_user	
	E Ad	vanced database option	s for selected rows				

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



EPM System Configurator	1.2.13.0000			
EPM Oracle Instance	Deploy to Application Server - S	pecify WebLogic Domain Information:		
<ul> <li>Configuration</li> </ul>	Deploy Java web applications to	an existing domain.		
Confirmation	Administration Server Host:	mjServer		Ì
) Progress	Administration Server Port.	7001		1
) Summary	Administrator User:	epm_admin		1
	Administrator Password			-
	Domain Name:	EPMSystem		
	O Deploy Java web applications to	a new domain. The Administration Server for this domain will be created on this machine.		
	Domain Name:	(CFM2qvateri)		
	Administration Server Port.			
	Administrator User:	epm_adms		
	Administrator Pass word			
	Confirm Administrator Password:			

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

EPM Oracle Instance	Depk	y to Application Server: Oracle We	bLogic			
Configuration	I Do	picy the Java web applications to a set	de manaped server			
Confirmation		EAR/WAR	Managed Server Name	Port	SSL Port	Status
Progress		FM Web Services	NEWNebD	7363	7365	1
<ul> <li>Summary</li> </ul>	1	FM ADF Web Application	HFM/Veb0	7363	7365	٩

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

REPM System Configurator	11.2.15.0.000	- 0
EPM Oracle Instance	Financial Management - Configure Server:	
Configuration	Port:	9091 Active:
Confirmation	SSL Port:	9092 Active:
Progress	SSL FOIL	ACIVE.
<ul> <li>Summary</li> </ul>		
	Max App Server Delay:	300 seconds
	Max Data Sync Delay:	300 seconds
	Database Connection Pool Size:	200
	Datasource Port Range:	
	Start Port:	10001
	End Port:	10020

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

Clusters are used to target different Financial Management tasks to different servers. A default cluster is created for you during configuration. The task of creating additional clusters is not part of this deployment process.

EPM Oracle Instance	Financial Management - Configure Cluster:
Configuration	Defined Clusters
Confirmation	Add Remove Edt
Progress	
Summary	Servers in the Cluster: Available Servers:
	Remove >

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



PEND Oracle Instance           Product/Task         Status           Status           Status           Procentiguration         Register with Shared Services         Configure Application Server         Configure Application Server         Configure Application Server         Deploy to Application Server         Summary         Deploy to Application Server         Deploy to Application Server         Deploy to Application Server         Deploy to Application Server         Server	Product/T	ask	Status	
Pre-Configuration         Pre-Configuration           9) Confirmation         Register with Shared Services           0) Progress         Configure Application Server           0) Summary         Configure Database	Financial Management	2002	0.010100	
Progress         Configure Application Server           Configure Database         Configure Database           Configure Application Cluster         Configure Application Cluster	Pre-Configuration			
Summary     Configure Database     Configure Application Cluster	Register with Shared Services			
Summary Configure Database Configure Application Cluster	Configure Application Server			
Configure Appendix Constant	Configure Database			
Deploy to Application Server	Configure Application Cluster			
	Deploy to Application Server			
Status				
You have selected the above tasks to be executed. Please click Next to start the process.				
<b>4</b>		xecuted. Please click Next to start the process.		

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

# Installing and Configuring Profitability and Cost Management on HPCMHOST1

### Note:

For Profitability and Cost Management:

- Beginning with Release 11.2.15, only Unicode mode Essbase applications are supported.
- The Unicode checkbox in the New Application dialog is now disabled and grayed out. By default, all the new Essbase applications will be set to Unicode mode.
- The existing non-Unicode applications will be automatically converted to Unicode during the 11.2.15 upgrade.
- Installing Profitability and Cost Management
- Creating Infrastructure Schemas Using Repository Creation Utility (RCU)
- Configuring Profitability and Cost Management

### Installing Profitability and Cost Management on HPCMHOST1

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



To install Profitability and Cost Management on HPCMHOST1:

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

REPM System Install			$\times$
Select a language:			
English		-	
<u>o</u> k	Cance	el	

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

EPM System Installer 11	2.15.0.000 — 🗆	1
🕑 Welcome	Welcome to EPM System Installer	•
Destination	This program will guide you through the installation of EPM System products.	
) Installation Type	Important!	10101
Product Selection		
Confirmation	Before installing, review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information on system requirements and release compatibility. Also review the Oracle Hyperion Enterprise Performance Management	
) Progress	System Installation and Configuration Guide for other information needed to plan a successful installation.	
) Summary	If you are upgrading from an earlier release, you must first perform pre-installation tasks, including exporting Shared Services	
	data, before you proceed. See the Installation and Configuration Guide for details.	
	Copyright © 2008, 2020, Oracle and / or its affiliates.	
	This software and related documentation are provided under a license agreement containing restrictions on use and disclosure	
	and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you	
	may not use conv reproduce translate broadcast modify license transmit distribute exhibit perform publish or display any	1
	EPM System Installer Prerequisite Checks <ul> <li>EPMINS-01024; EPM System Installer successfully resolved the hostname - phoenix350270.ad1.fusionappsdephx.oraclevcn.com</li> </ul>	
	<ul> <li>EPMINS-01026: The operating system is supported - Windows Server 2022 Standard</li> </ul>	
	EPMINS-01063: All environment variables prerequisites have been met.     EPMINS-01071: Oracle Inventory is not installed	
	Failure to meet all prerequisites may result in unsatisfactory results. If you receive errors, please check the Help or documentation for more information.	
		Т
Help	Next Canc	el

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

FPM System Installer 11.2.1	5.0.000	<u></u> :		×
Welcome	Enter the location of Middleware Home (spaces are not supported):			
Destination	C:\Oracle\Middleware Browse			
Installation Type				
Product Selection				
Confirmation				
Progress				
Summary				
	▲ ▲			
Load <u>H</u> elp			Cance	1.000

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

FPM System Installer 11.2.1	5.0.000	<u></u> :		×
Welcome     Destination     Product Selection     Orogress     Summary	Choose the install type: New installation Re-install this release Apply Update			
Help	Back Next		<u>C</u> ance	

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

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

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

) Welcome	Select the product components:	Hide Unavailable Product Componen
Destination	Uncheck all	Hide Unavailable Product Componen
Installation Type	Foundation Services	
Product Selection	E Foundation Components	
Confirmation	Oracle Database Client 32-bit     Oracle Database Client 64-bit	
Progress	Essbase	
Summary	Essbase Server	
	Financial Reporting	
	Planning     D     Financial Close Management	
	Tax Management	
	Financial Management	
	FDM Enterprise Edition	
	Profitability and Cost Management	
	Profitability and Cost Management Java Web Application     Profitability and Cost Management Samples	
	Promability and cost management samples	
	Essbase Services	
	Essbase Services Status: EPMINS-01015: The selected component can be installed.	

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



Welcome	EPM Oracle Home: C:\Oracle\Middleware1\EPMSystem11R1		
	Product/Component	Installation Type	Status
Destination	Common Components	Install	
Installation Type	Essbase Product Common Components	Install	
C motanation type	Product Common Components	Install	
Product Selection	Tools	Install	
~	Foundation Services		
Confirmation	WebLogic Application Server	Install	
Deserves	Static Content Files	Install	
Progress	Essbase		
Summary	Essbase Server	Install	
()	Profitability and Cost Management		
	Profitability and Cost Management Samples	Install	
	Profitability and Cost Management Java Web Application	Install	

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

## Creating Infrastructure Schemas Using Repository Creation Utility on HPCMHOST1

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

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

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

### Configuring Profitability and Cost Management on HPCMHOST1

- 1. On HPCMHOST1, launch EPM System Configurator: From the Start menu, select Oracle EPM System, and then EPM System Configurator (all instances).
- 2. In EPM Oracle Instance, complete these steps, and then click Next.
  - a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Oracle Hyperion Foundation Services (on*FNDHOST1*).
  - b. In EPM Oracle instance name, enter HPCM1.

FPM System Configurate	or 11.2.15.0.000			12-16		X
EPM Oracle Instance	Select the EPM Oracle Instance to which t	he configuration would be applied:				
Configuration	Verse diseases for EDV Oracle instances	C:\Oracle\Middleware\user_projects		Brov	WSP	
Confirmation	Home directory for EPM Oracle instances:		] [			
Progress	EPM Oracle instance name:	HPCM1				
<ul> <li>Summary</li> </ul>	Only one EPM Instances Home is supported per	r user and EPM System.				
Help			Next		Cance	el

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

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

		EPM System Configurator 11.2.15.0.000	00	) ×
EPM Oracle Instance     Onfiguration     Onfiguration     Progress     Summary	<ul> <li>Connect to a previous</li> </ul>	s and Registry Database Connection associated with the database instance home: ly configured Shared Services database figuration of Shared Services database rmation:		
	Database Type: Server: Port: Service Name or SID: User Name: Password:	epm_user	ced Opt	ions
<u>H</u> elp	L	Back Next	Cano	:el

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



EPM System Configurator 1	.2.15.0.000	-	0	×
Configuration Confirmation Progress	Check All  Hyperion Foundation  FDM Enterprise Edition  FDM Enterprise Edition  FDM Configure Essbase Server  Configure Essbase Server  FDM Configure Interprise Edition  FDM Co			
	4			T,

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

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

	EPM Oracle Instance	Configure D	atabase:					
Confirmation         Product Name         Server         Port         Servicename/SD         Username         Password           Summary         Profitability and Cost Managepm.example.com         1521         epm.example.com         epm_user         execution	Configuration	Database Typ	96:	Oracle's Driver (Thin)				
Progress         Product Name         Server         Pott         Servicename/SD         Username         Password           Summary         Profitability and Cost Manag	Confirmation							
Summary							and the second se	and the second se
	Progress	Profita	bilty and Cost Manag	epm.example.com	1521	epm example.com	epm_user	

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



EPM Oracle Instance	Construction and second		 	-
Contraction of the second	Deploy to Application Server - S	pecify WebLogic Domain Information:		
Configuration	Deploy Java web applications to	an existing domain.		
Confirmation	Administration Server Host.	m/Server		
) Progress	Administration Server Port	7001		
) Summary	Administrator User:	epm_admin		
	Administrator Password			
	Domain Name:	EPMSystem		
	O Deploy Java web applications to	a new domain. The Administration Server for this domain will be created on this machine.		
	Domain Name:	(CRE2petere		
	Domain Name: Administration Server Port.	ERIDysteni 7701		
	in the second second second second			
	Administration Server Port.			
	Administration Server Port. Administrator User			
	Administration Server Port. Administrator User: Administrator Pass word:			
	Administration Server Port. Administrator User: Administrator Pass word:			

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

) EPM Oracle Instance	Deploy to Application Server: Oracle W	VebLogic				_
Configuration	Deploy the Java web applications to a s	single managed server				
) Confirmation	.EAR/.WAR	Managed Server Name	Port	SSL Port	Status	
) Progress	Profitability	Profitability0	6756	6743		
Summary	💌 aps	AnalyticProviderServices0	13080	13083		

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

) EPM Oracle Instance	Product/Task	Status
Oraclauration	Provider Services	
) Configuration	Pre-Configuration	
) Confirmation	Deploy to Application Server	
Progress	Profitability and Cost Management	
CONTRACTOR AND A DESCRIPTION OF	Pre-Configuration	
Summary	Register with Shared Services	
	Configure Database	
	Deploy to Application Server	
	Processing Re-registration Script	
	_ Status	
	Status You have selected the above tasks to be executed. Please click Next to sta	rt the process.

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

### Installing and Configuring FDMEE on FDMEEHOST1

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

### Installing FDMEE on FDMEEHOST1

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

To install FDMEE on FDMEEHOST1:

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



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

EPM System Installer 1	1.2.15.0.000	
Helcome	Welcome to EPM System Installer	-
Destination		
Installation Type	This program will guide you through the installation of EPM System products.	-
CONTRACTOR OF A DESCRIPTION OF A DESCRIP	Important!	33
Product Selection	inportant.	
Confirmation	Before installing, review the Oracle Hyperion Enterprise Performance Management System Certification Matrix for information	-
Progress	on system requirements and release compatibility. Also review the Oracle Hyperion Enterprise Performance Management	
	System Installation and Configuration Guide for other information needed to plan a successful installation.	
Summary	If you are upgrading from an earlier release, you must first perform pre-installation tasks, including exporting Shared Services	
	data, before you proceed. See the Installation and Configuration Guide for details.	
	data, before you proceed. See the instantion and configuration Guide for details.	
	Copyright © 2008, 2020, Oracle and / or its affiliates.	
	This software and related documentation are provided under a license agreement containing restrictions on use and disclosure	
	and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you	
	EPM System Installer Prerequisite Checks	
	CPM system instance recreases our concess ✓ EPMINS-01024: EPM System installer successfully resolved the hostname - phoenix350270.ad1.fusionappsdephx.oraclev.cn.com	
	<ul> <li>EPMINS-01026: The operating system is supported - Windows Server 2022 Standard</li> </ul>	
	<ul> <li>EPMINS-01063: All environment variables prerequisites have been met.</li> <li>EPMINS-01071: Oracle Inventory is not installed</li> </ul>	
	<ul> <li>EPHilling - 010/1. Oracle inventory is not installed</li> <li>Failure to meet all prerequisites may result in unsatisfactory results. If you receive errors, please check the Help or documentation for more</li> </ul>	
	rature to meet all prerequisities may result in unsatisfactory results. If you receive errors, please check the netp or documentation for more information.	
	I ////////////////////////////////////	П
Help	Next Canc	-1

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



FPM System Installer 11.2.1	5.0.000	<u></u> ;		×
() Welcome	Enter the location of Middleware Home (spaces are not supported):			
Destination	C:\OracleMiddleware Browse			
Installation Type				
Product Selection				
Confirmation				
Progress				
Summary				
	I I			
Load <u>H</u> elp	Back Next		<u>C</u> ancel	r i

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

FPM System Installer 11.2.	5.0.000		×
Welcome     Destination     Installation Type     Product Selection     Onfirmation     Progress     Summary	Choose the install type: Provinstallation Apply Update		
Help	<u>B</u> ack <u>N</u> ext	<u>C</u> ance	I

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

#### **FDM Enterprise Edition**

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



	-		
) Welcome	Select the product components:		
Destination	Uncheck all	Hide Unavailable Pro	duct Compor
<ul> <li>Installation Type</li> <li>Product Selection</li> </ul>	Foundation Services      Foundation Components      Oracle Database Client 32-bit		
Confirmation	Oracle Database Client 64-bit		
) Progress	E Calculation Manager ⊡-□ Essbase		
9 Summary			
	Financial Management Status: EPMINS-01015: The selected component can be installed.		

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

Welcome	EPM Oracle Home: C:\Oracle\Middleware\EPMSystem11R1		
<ul> <li>Destination</li> </ul>	Product/Component	Installation Type	Status
Obesuitation	Common Components	Install	
Installation Type	Essbase Product Common Components	Install	
A CONTRACTOR OF A DECISION OF A DECISIONO OF A DECIS	Product Common Components	Install	
Product Selection	Tools	Install	
0	Foundation Services		
Confirmation	Calculation Manager Java Web Application	Install	
Progress	Oracle Database Client 64-bit	Install	
O Progress	Oracle Database Client 32-bit	Install	
Summary	WebLogic Application Server	Install	
Contraction of the second	Oracle HTTP Server	Install	
	Static Content Files	Install	
	Workspace Java Web Application	Install	
	Foundation Services Java Web Applications	Install	
	Financial Management		
	Financial Management SDK	Install	
	FDM Enterprise Edition		
	FDM Enterprise Edition Java Web Application	Install	

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

## Creating Infrastructure Schemas Using Repository Creation Utility on FDMEEHOST1

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

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

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

### Configuring FDMEE on FDMEEHOST1

- 1. Launch EPM System Configurator: From the Start menu, select Oracle EPM System, and then EPM System Configurator (all instances).
- 2. In EPM Oracle Instance, complete these steps, and then click Next.
  - a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Oracle Hyperion Foundation Services (on *FNDHOST1*).
  - b. In EPM Oracle instance name, enter FDMEE1.

	Browse
Confirmation     Home directory for EPM Oracle instances: C:\Oracle\Middleware\user_projects     EPM Oracle instance name: FDMEE1	Browse
Confirmation     Progress     FDMEE1	
Progress	
Summary Only one EPM Instances Home is supported per user and EPM System.	

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

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

		EPM System Configurator 11.2.15.0.000	$\odot$	×
EPM Oracle Instance     On figuration     Configuration     On firmation     Progress     Summary	<ul> <li>Connect to a previous</li> </ul>	s and Registry Database Connection associated with the database instance home: ly configured Shared Services database figuration of Shared Services database prmation:		
	Database Type: Server: Port: Service Name or SID: User Name: Password:	epm_user		ns
Help		Back Next	<u>C</u> ance	

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



EPM System Configurato	r 11.2.15.0.000				×
EPM Oracle Instance	Icon type: 🔥 Pending 🛛 Configuration Passed 🗳 Configuration Failed				
Configuration	Check A8				
Confirmation	8 D Alyperion Foundation				
) Progress					
2	Deploy to Application Server				
Summary	B      B				
	B 3 Financial Management B 3 A Planning				
	E 🔄 🔥 Profitability and Cost Management				
	🛞 🧾 🚯 Financial Reporting				
	<b>(</b>				
Help		Back	Next	Can	cel

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

EPM Oracle Instance	Configu	re Database:					
Configuration	Database	Type:	Oracle's Driver (Thin)				
Confirmation		Product Name	Server	Port	Servicename/SD	Username	Password
Progress	V V F0	M Enterprise Edition	epm.example.com	1521	epm.example.com	epm_user	Password
Summery							

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

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



	11.2.15.0.000			3
() EPM Oracle Instance	Deploy to Application Server - S	specify WebLogic Domain Information:		
<ul> <li>Configuration</li> </ul>	Oeploy Java web applications to	o an existing domain.		
Confirmation	Administration Server Host.	myServer		1
Progress	Administration Server Port	7001		1
6) Summary	Administrator User:	epm_admin		1
	Administrator Password			7
	Domain Name:	EPMSystem		1
	and the second	A COMMUNICATION OF A COMMUNICATIONO OF A COMMUNICATION OF A COMMUNICAT		
	<ul> <li>Deploy Java web applications to</li> </ul>	a new domain. The Administration Server for this domain will be created on this machine.		
	O Deploy Java web applications to Domain Name:	a a new domain. The Administration Server for this domain will be created on this machine.		
	Domain Name:	EProgrammi		
	Domain Name: Administration Server Port.	(ERX5ystee) (700)		
	Domain Name: Administration Server Port Administrator User:	(ERX5ystee) (700)		
	Domain Name: Administration Server Port. Administrator User: Administrator Pass word.	(ERX5ystee) (700)		
	Domain Name: Administration Server Port. Administrator User: Administrator Pass word.	(ERX5ystee) (700)		

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

EPM Oracle Instance	Deploy to Appli	cation Server: Oracle Wel	bLogic			
Configuration	Deploy the Jay	ra web applications to a sin	ple managed server			
Confirmation		EAR/.WAR	Managed Server Name	Port	SSL Port	Status
) Progress	🕑 af		Erpietegratorű	6550	6553	٩

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

	1		 n
	Status You have selected the above tasks to be executed. Please click Nes	t to start the process.	
3 Summary			
e) Progress	Configure Database Deploy to Application Server		
Confirmation	Register with Shared Services		
Configuration	FDM Enterprise Edition Pre-Configuration		

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



## 7

# Reconfiguring the Web Server and Validating the Deployment

#### **Related Topics**

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

## Reconfiguring and Restarting the Web Server

To reconfigure and restart Oracle HTTP Server:

- 1. Stop Oracle HTTP Server: Launch <Local
   Drive>:\Oracle\Middleware\user\_projects\Foundation1\httpConfig\ohs\bin\stopCom
   ponent.cmd ohs\_component.
- On the Oracle Hyperion Foundation Services host server (*FNDHOST1*), launch EPM System Configurator: From the Start menu, select Oracle EPM System, and then EPM System Configurator (all instances).
- 3. In EPM Oracle Instance, complete these steps, and then click Next.
  - a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services (on*FNDHOST1*).

b.	In EPM Oracle instance name,	ensure that the instance name is Foundation1.
----	------------------------------	---

i EPM System Configurato	or 11.2.15.0.000		- 🗆 X
EPM Oracle Instance	Select the EPM Oracle Instance to which t	he configuration would be applied:	
Configuration		C:\Oracle\Middleware\user_projects	Browse
Confirmation	Home directory for EPM Oracle instances:		Diowse
• Progress	EPM Oracle instance name:	Foundation1	
Summary	Only one EPM Instances Home is supported per	r user and EPM System.	
-			
Help			<u>N</u> ext <u>Cancel</u>



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

5. In Configure Web Server, click Next.

	1			
EPM Oracle Instance	Configure Web Server:			
Configuration	Web Server Type:	Oracle HTTP Server		
Confirmation	web Server Type.	Oracle HTTP Server		
Contranation	Web Server Port:	19000		
Progress				
				Advanced Op
ummary				
	Note: Enabling Web Server S	SL requires manual configuration.		
	Cat the legisel address for	the applications to this web server		
	Set the logical address for	the applications to this web server		
		Compone	ant	
	AIF	Compose		
	APS			
	CALC			
	EAS			
	HFM ADF Java Web Applicat	on		
	HFM Web Services			
	Planning			
	Profitability			
	Workspace			
	Financial Reporting			
	Shared Services			

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

Configuration	Update the logical address for the Java	web applications:					
Confirmation	<ul> <li>Set the logical address for all the applica</li> </ul>	tions to:					
Progress	Host: internal.epm.com						
TOTOTARD IN FRANK IN ST							
Summary	Port: 80	Port: 80					
	SSL Port: 443						
	Set the logical address for each applicat Product Component	Host	Port	SSL Port	Context		
	aps	internal.epm.com	19000	19443 aps			
	Profitability	internal.epm.com	19000	19443 profita	bility		
	Financial Reporting	internal.epm.com	19000	19443 hr			
	Shared Services	internal.epm.com	19000	19443 interop	2		
	aif	internal.epm.com	19000	19443 aif			
			19000	19443 Hyperi	ionPlanning		
	Planning	internal.epm.com	19000		lonn lanning		
	Planning eas	internal.epm.com	19000		on annig		
		internal.epm.com internal.epm.com		19443 eas			
	eas Workspace FM Web Services	internal.epm.com internal.epm.com internal.epm.com	19000 19000 19000	19443 eas 19443 works 19443 oracle	pace -epm-fm-webservices		
	eas Workspace	internal.epm.com internal.epm.com	19000 19000	19443 eas 19443 works 19443 oracle 19443 hfmad	pace -epm-fm-webservices f		

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

Configuration Confirmation	Hyperion Foundation	
Confirmation	Configure Web Server	
	Configure Logical Address for Web Applications	
Progress		
) Summany		
Summary		
	Status	
	You have selected the above tasks to be executed. Please click Next to sta	art the process.

8. On the Foundation Services host server (*FNDHOST1*), start Oracle HTTP Server: Launch <Local

Drive>:\Oracle\Middleware\user\_projects\Foundation1\httpConfig\ohs\bin\startCo mponent.cmd ohs\_component, and then enter the WebLogic Admin password.





#### Note:

In multi-node configurations, modify the httpd.conf file (located under MIDDLEWARE\_HOME/user\_projects/epmsystem1/httpConfig/ohs/config/ fmwconfig/components/OHS/ohs\_component/httpd.conf on the load balancer server to direct the LCM proxy servlet to the same server instance of the FinancialClose server for subsequent requests (otherwise the requests from nodes are broadcasted in round-robin basis).

```
Example:
ProxyPass "/test" "balancer://mycluster" stickysession=JSESSIONID|
jsessionid
scolonpathdelim=On
<Proxy "balancer://mycluster">
BalancerMember "http://192.168.1.50:80" route=node1
BalancerMember "http://192.168.1.51:80" route=node2
</Proxy>
```

### **Refreshing EPM Workspace**

To refresh Oracle Hyperion Enterprise Performance Management Workspace:

- **1.** Start a browser session.
- 2. Access EPM Workspace by accessing the following URL:

http://FNDHOST1:9000/workspace/refresh

In this URL, use port 9000, which is the managed server port where EPM Workspace is available, not the Oracle HTTP Server port.

3. On the Login screen, enter admin and the deployment password.

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



### Validating the Deployment

#### Validating Essbase

To validate the Oracle Essbase installation:



- If Essbase is not started, on *ESSHOST1*, start Oracle Enterprise Performance Management System: from the Start, select Oracle EPM System, and then Start EPM System.
- Navigate to ARBORPATH/bin (for example, <Local Drive>:/epm\_data/bin), and then start MaxL by double-clicking startMaxl.bat.
- 3. At the MaxL prompt, enter the following command:

LOGIN;

- 4. Enter the name of the system administrator that you defined during configuration; for example, admin.
- 5. Enter the password for the system administrator.
- Enter the fully qualified host name for the server hosting Essbase Server (ESSHOST1).
   You should see "Logged in to Essbase".
- 7. To quit MaxL, enter EXIT; at the prompt.

## Validating Planning, Financial Management, Profitability and Cost Management, and FDMEE

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

1. Start Oracle Hyperion Enterprise Performance Management Workspace by accessing the following URL:

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

- 2. Log in using the system administrator user name and password that you identified.
- 3. In EPM Workspace, select **Navigate**, then **Administer**, and then **Planning Administration**.

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

PRACLE Enterprise Perform avigate File View Favorites Tools E S Favorites Tools Planning Administration ×		orkspace, Fusio	n Edition		
Planning Administration	Manage Applica	tions			
Manage Applications Manage Data Source	Actions View  Application MGPLNEBS PN_CRReg Vision	<b>◆</b> X B	Detach	•	

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



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

The Consolidation Administration application opens.

<u>N</u> avigate <u>F</u> ile <u>V</u> iew Favo <u>r</u> ites <u>T</u> oo	rkspace/index.jsp ormance Management System Workspace, Fusion Edition bls Administration Help D T T T T T T T T T T T T T T T T T T T
Admin Tasks	Messages
> System	Actions 🕶 View 🕶 🏍 💥 🦉 🍓 🚱
Applications	Type System Message Summary
<ul> <li>Import Application</li> <li>Profile Editor</li> <li>Configure DSN</li> <li>Task Flows</li> <li>Audit</li> </ul>	There are no results that match the filter criteria

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

The Profitability application opens.

te <u>File V</u> iew Favo <u>r</u>	tes <u>T</u> ools <u>H</u> elp	
🗎 💋 🍲 Explore		-
fitability Applications	×	Search:
Applicati	0.005	
Applicati	ons	Actions - R
	UIIS	Actions - R
	0115	Actions - R

- 8. In EPM Workspace, select Navigate, then Administer, and then Data Management.
- 9. Click **OK** if compatibility setting warning is displayed.

The FDMEE application opens.



jate File View Favorites Tools Help		
📸 💑 Explore		
ata Management ×	Search:	Adva
Lorkflow Setup		
Fasks		
ata Load • Data Load Workbench • Data Load Mapping		
etadata • Metadata Rule		
ther = Batch Execution = Report Execution = Script Execution		
onitor Process Details		



## 8 Scaling Out the Application Tier

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

### **Scaling Out Foundation Services**

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

To scale out Foundation Services:

- Log on to the Foundation Services scale-out machine (FNDHOST2) as the deployment user, and define a network drive (for example, Z:/) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, //sharedhost/sharedlocation/downloads/epm unzipped).
- 2. From the mapped network drive, launch installTool.cmd.
- 3. Follow the EPM System Installer wizard:
  - In Destination, specify the MIDDLEWARE\_HOME directory location exactly as set while deploying Foundation Services on FNDHOST1.
  - In Installation Type, select New Installation.
  - In **Product Selection**, clear the selection (uncheck) from **Uncheck All**, and then select the following components:

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

- Foundation Services and all components listed under Foundation Services
- Essbase—Essbase Server
- Financial Reporting—Financial Reporting Java Web Application
- Planning—Planning Java Web Application
- Financial Management—Financial Management SDK (automatically selected)
- Financial Management—Financial Management Java Web Applications
- FDM Enterprise Edition—FDM Enterprise Edition Java Web Application
- Profitability and Cost Management Java Web Application
- Profitability and Cost Management Samples

EPM System Installer 11	2.15.0.000	- 0
) Welcome	Select the product components:	
Destination	Uncheck all	Hide Ünavailable Product Componer
Installation Type	Foundation Services	
Product Selection		
Confirmation	✓ Oracle Database Client 32-bit	
the local sector sector sector		
Progress	Essbase	
Summary	Essbase Server	
	□ Planning	
	Planning Java Web Application	
	Financial Management	
	Financial Management SDK	
	Financial Management Java Web Applications     Financial Management Server	
	FDM Enterprise Edition	
	FDM Enterprise Edition Java Web Application	
	Image: Image	
	Profitability and Cost Management Samples	
	Tax Management Status: EPMINS-01015: The selected component can be installed.	
Help		Back Next Cancel

- 4. In Summary, click Finish after verifying that all components installed successfully.
- 5. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *FNDHOST2*. Note these steps:
  - On the Select Components page, enter a unique prefix, for example FNDHOST2.
  - When modifying RCUSchema.properties in a text editor, for schemaPrefix, make sure to enter the unique prefix used on this machine, for example FNDHOST2.
- Launch EPM System Configurator: Launch EPM System Configurator: From the Start menu, select Oracle EPM System, and then EPM System Configurator (all instances).
- 7. In EPM Oracle Instance, complete these steps, and then click Next.
  - a. In **Home directory for EPM Oracle instance**, verify that the location of EPM Oracle Home directory is identical to that specified while configuring Foundation Services on *FNDHOST1*.
  - b. In EPM Oracle instance name, enter Foundation2.



Summary	Only one EPM Instances Home is supported per	user and EPM System.			
) Progress	EPM Oracle instance name:	Foundation2			
Configuration	Home directory for EPM Oracle instances:	C:\Oracle\Middleware\user_projects	Browse		
EPM Oracle Instance	Select the EPM Oracle Instance to which the	ne configuration would be applied:			

- On the Set Up Shared Services and Registry Database Connection screen, complete these steps:
  - a. Select Connect to a previously configured Shared Services database.
  - b. Enter database connection information for Oracle Hyperion Shared Services Registry and the user name and password of the database account to use for accessing the database (recorded in Table 1). This information must be identical to the information you entered while deploying Foundation Services on *FNDHOST1*.
  - c. Click Next.

If you are scaling out on the same machine as *FND1HOST*, you do not see the **Set up Shared Services and Registry Database Connection** screen.

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

		EPM System Configurator 11.2.15.0.000	$\odot$	×
EPM Oracle Instance	Set up Shared Service	s and Registry Database Connection associated with the database instance home:		_
<ul> <li>Configuration</li> </ul>	<ul> <li>Connect to a previous</li> </ul>	sly configured Shared Services database		
Confirmation	O Perform first-time cor	nfiguration of Shared Services database		
Progress	Database connection infe	ormation:		
( Summary				
	Database Type:	Oracle's Driver (Thin)	-	
	Server:	epm.example.com		
	Port:	1521		
		epm.example.com		
	User Name:	epm_vser		
	Password:	Adv	vanced Option	<u>ns</u>
Help		Back Next	Cancel	



- 9. On the **Configuration** screen, complete these steps:
  - a. Remove the selection (uncheck) from Uncheck All.
  - b. Select these components From Hyperion Foundation:
    - Scale out single managed server on this machine
    - Configure Web Server
  - c. Click Next.
- 10. In Configure Web Server, complete these steps, and then click Next.
  - a. In Web Server Type, select Oracle HTTP Server.
  - **b.** In **Web Server Port**, change the web server port number if you changed it on *FndHost1*.
  - c. Click Advanced Options and specify the location of the shared drive on which to install Oracle HTTP Server, click OK, and then click Next. The shared drive location is the same location that you specified on the first Foundation Services host machine (*FNDHOST1*).
- **11.** In **Confirmation**, review the summary of the configuration tasks that will be executed, and then click **Next**.
- 12. When the deployment process is complete, the **Summary** screen is displayed. Verify that all the tasks completed successfully, and then click **Finish**.
- 13. Start EPM System: From the Start menu, select Oracle EPM System, and then Start EPM System.
- 14. Reconfigure the load balancer so that it routes requests addressed to epm.mycompany.com and epminternal.mycompany.com to the Oracle HTTP Server on this Foundation Services host also.

### Scaling out Essbase Server

Complete this procedure on each host machine, for example, *ESSHOST2*, onto which Oracle Essbase is to be scaled out.

Because scaled-out Essbase Servers are independent, an application deployed to one server does not span across to other Essbase Servers. While creating applications, for example, using Oracle Hyperion Planning, you choose the Essbase Server that you want to use.

To scale out Essbase Server:

- 1. Verify that you are logged on to the Essbase Server scale-out machine (*ESSHOST2*) using the deployment user.
- 2. Install Essbase Server on ESSHOST2 using the instructions in Installing Essbase Server on ESSHOST1.

In the steps, use *ESSHOST2* instead of *ESSHOST1* as the host name.

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



- When modifying RCUSchema.properties in a text editor, for schemaPrefix, make sure to enter the unique prefix used on this machine, for example ESSHOST2.
- 4. Configure using the steps in Configuring Essbase on ESSHOST1.
- 5. On the scaleout machine, start Oracle Enterprise Performance Management System: From the Start menu, select Oracle EPM System, and then Start EPM System.

### Scaling Out Planning

To scale out Oracle Hyperion Planning, you install and configure one or more additional instances of Planning. Complete this procedure on each host machine, for example, *PLANHOST2*, onto which Planning is to be scaled out.

To scale out Planning:

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

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

- 3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *PLANHOST2*. Note these steps:
  - On the Select Components page, enter a unique prefix, for example PLANHOST2.
  - When modifying RCUSchema.properties in a text editor, for schemaPrefix, make sure to enter the unique prefix used on this machine, for example PLANHOST2.
- 4. Configure Planning using the steps in Configuring Planning on PLANHOST1.

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

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

### Scaling Out Financial Management

To scale out Oracle Hyperion Financial Management, you install and configure one or more additional instances of Financial Management. Complete this procedure on each host machine, for example, *HFMHOST2*, onto which Financial Management is to be scaled out.

To scale out Financial Management:

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

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

- 3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *PLANHOST2*. Note these steps:
  - On the Select Components page, enter a unique prefix, for example HFMHOST2.



- When modifying RCUSchema.properties in a text editor, for schemaPrefix, make sure to enter the unique prefix used on this machine, for example HFMHOST2.
- 4. Configure Financial Management using the steps in Configuring Financial Management on HFMHOST1.

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

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

### Scaling Out Profitability and Cost Management

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

To scale out Profitability and Cost Management:

- 1. Verify that you are logged on to the Profitability and Cost Management scale-out machine (HPCMHOST2) using the deployment user.
- 2. Install Profitability and Cost Management and Oracle Hyperion Provider Services using the instructions in Installing Profitability and Cost Management on HPCMHOST1.

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

- 3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on HPCMHOST2. Note these steps:
  - On the Select Components page, enter a unique prefix, for example HPCMHOST2.
  - When modifying RCUSchema.properties in a text editor, for schemaPrefix, make sure to enter the unique prefix used on this machine, for example HPCMHOST2.
- 4. Configure Profitability and Cost Management and Provider Services using the steps in Configuring Profitability and Cost Management on HPCMHOST1.

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

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

### Scaling Out FDMEE

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

To scale out FDMEE:

- Verify that you are logged on to the FDMEE scale-out machine (FDMEEHOST2) using the deployment user.
- 2. Install FDMEE using the instructions in Installing FDMEE on FDMEEHOST1.

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

- 3. Follow the steps in Creating Infrastructure Schemas Using Repository Creation Utility on FNDHOST1 to run the Repository Creation Utility and update RCU schema properties on *FDMEEHOST2*. Note these steps:
  - On the Select Components page, enter a unique prefix, for example FDMEEHOST2.



- When modifying RCUSchema.properties in a text editor, for schemaPrefix, make sure to enter the unique prefix used on this machine, for example FDMEEHOST2.
- 4. Configure FDMEE using the steps in Configuring FDMEE on FDMEEHOST1.

In the steps, use FDMEE2 instead of FDMEE1 as the instance name on this machine.

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

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

### Reconfiguring and Restarting the Web Server After Scaling Out

After scaling out, perform these steps:

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

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

### **Refreshing EPM Workspace**

If you scaled out Oracle Hyperion Foundation Services, refresh Oracle Hyperion Enterprise Performance Management Workspace on each Foundation Services host machine in your deployment.

To refresh EPM Workspace:

- **1**. Start a browser session.
- 2. Access EPM Workspace by accessing the following URL:

http://FNDHOST1:9000/workspace/refresh

In this URL, use port 9000, which is the managed server port where EPM Workspace is available, not the Oracle HTTP Server port.

3. On the Login screen, enter admin and the deployment password.

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



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



### Generating a Deployment Report

Generate a deployment report as a reference of your current deployment. This report allows you to compare this deployment with future deployments.

To generate a deployment report:

- 1. Open a command prompt window on the Oracle Hyperion Foundation Services host machine (*FNDHOST1*).
- Navigate to EPM\_ORACLE\_INSTANCE/bin; for example, <Local Drive>:/Oracle/ Middleware/user projects/FOUNDATION1/bin.
- 3. Execute the following command:

epmsys\_registry report deployment

The report file (deployment\_report\_YYYYMMDD\_HHMMSS.html) is stored in EPM\_ORACLE\_INSTANCE/diagnostics/reports; for example, <Local Drive>:/ Oracle/Middleware/user\_projects/FOUNDATION1/diagnostics/reports/ deployment\_report\_YYYYMMDD\_HHMMSS.html.



## Installing EPM System Clients

#### **Related Topics**

- Installing Smart View
- Installing Administration Services Console

### **Installing Smart View**

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

To install Smart View on a client machine:

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

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

### Installing Administration Services Console

Because Oracle Essbase Administration Services Console requires access to the host servers in the application tier, it should be installed on a machine that has network access to these servers. In the reference topology (illustrated in Standard Deployment Topology), Administration Services Console is installed on the client workstation (*CLIENTHOST1*) within the DMZ.

To install Administration Services Console:

- On a client machine that has network access to the host servers in the application tier, define a network drive (for example, z:/) that maps to the shared disk directory into which you extracted Oracle Enterprise Performance Management System software (for example, //sharedhost/sharedlocation/downloads/epm unzipped).
- On the mapped network drive, navigate to EssbaseAdministrationServicesConsole directory; for example, to Z:/EssbaseAdministrationServicesConsole.
- 3. Double-click EASConsole.exe.
- 4. Follow onscreen prompts to install Administration Services Console.
- 5. In Summary, click Finish.
- 6. Start Administration Services Console by selecting **Start**, then **Oracle EPM System**, and then **Start Administration Services Console**.
- 7. Log in using the *FndHost1* server name and the system administrator user name and password that you identified.

