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Check the Oracle Documentation Library (http://www.oracle.com/technology/documentation/epm.html) on Oracle® Technology Network to see whether an updated version of this guide is available.

Use this guide to help plan your Oracle Hyperion Enterprise Performance Management System product installation and configuration.

You can find EPM System installation documentation on the Oracle Documentation Library and on Oracle® E-Delivery.

### Table 1  Documentation That You Need

<table>
<thead>
<tr>
<th>Task</th>
<th>Related Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning the installation</td>
<td>This guide, Oracle Hyperion Enterprise Performance Management System Installation Start Here</td>
</tr>
<tr>
<td>Installing and configuring EPM System products</td>
<td>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</td>
</tr>
<tr>
<td>Automatically deploying EPM System products</td>
<td></td>
</tr>
<tr>
<td>Starting EPM System products</td>
<td></td>
</tr>
<tr>
<td>Validating the installation</td>
<td></td>
</tr>
<tr>
<td>Upgrading EPM System products</td>
<td></td>
</tr>
<tr>
<td>Provisioning users</td>
<td>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</td>
</tr>
</tbody>
</table>

### Table 2  Documentation That You Might Need

<table>
<thead>
<tr>
<th>Task</th>
<th>Related Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Troubleshooting installations</td>
<td>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide</td>
</tr>
<tr>
<td>Creating a backup of product and application data</td>
<td>Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide</td>
</tr>
<tr>
<td>Migrating from one environment to another</td>
<td>Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide</td>
</tr>
<tr>
<td>Task</td>
<td>Related Documentation</td>
</tr>
<tr>
<td>-------------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Enabling SSL</td>
<td><em>Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide</em></td>
</tr>
<tr>
<td>Replicating EPM System applications for high availability</td>
<td><em>Oracle Hyperion Enterprise Performance Management System High Availability Guide</em></td>
</tr>
</tbody>
</table>
EPM System Product Deployment

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Use this chapter to help plan your deployment architecture.

Note:
To see which product components are required and optional for your products, review the Media Pack Readme on Oracle® E-Delivery (http://edelivery.oracle.com/).

Primary families of EPM System products:

- Oracle's Hyperion® Foundation Services
- Oracle Essbase
- Oracle’s Hyperion Reporting and Analysis
- Oracle's Hyperion Financial Performance Management Applications
- Oracle's Data Management

Note:
For information about how EPM System products integrate with Oracle Business Intelligence Enterprise Edition and Oracle Business Intelligence Publisher, see the Oracle Business Intelligence New Features Guide and the Oracle Business Intelligence Publisher Administrator’s and Developer’s Guide, respectively.
# About EPM System Products

## Foundation Services

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle's Hyperion® Shared Services</td>
<td>Shared Services integrates EPM System products to provide user provisioning, lifecycle management, and task flow management. It also provides the Shared Services Registry, a central repository that simplifies product configuration by storing and re-using information for most EPM System products that you install.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Also includes Oracle's Hyperion® Remote Authentication Module if you run Shared Services on UNIX and authenticate users with NTLM.</td>
</tr>
<tr>
<td>Oracle Enterprise Performance Management Workspace, Fusion Edition</td>
<td>EPM Workspace provides a consistent and interactive thin-client environment for working with EPM content. EPM Workspace is the Web client for the following products:</td>
</tr>
<tr>
<td></td>
<td>- Reporting and Analysis</td>
</tr>
<tr>
<td></td>
<td>- Oracle Hyperion Planning, Fusion Edition</td>
</tr>
<tr>
<td></td>
<td>- Oracle Hyperion Profitability and Cost Management, Fusion Edition</td>
</tr>
<tr>
<td></td>
<td>- Oracle Hyperion Financial Management, Fusion Edition</td>
</tr>
<tr>
<td></td>
<td>- Oracle Hyperion EPM Architect, Fusion Edition</td>
</tr>
<tr>
<td></td>
<td>- Oracle Hyperion Performance Scorecard, Fusion Edition</td>
</tr>
<tr>
<td></td>
<td>- Hyperion Calculation Manager</td>
</tr>
<tr>
<td></td>
<td>In addition, BI Publisher and Oracle BI EE can be configured to integrate with EPM Workspace.</td>
</tr>
<tr>
<td>Performance Management Architect</td>
<td>Performance Management Architect enables creation and deployment of financial applications from a central location. The visual environment provided by Performance Management Architect provides a simple and intuitive user experience for modeling the financial business process, including data, dimensions, and application logic.</td>
</tr>
<tr>
<td></td>
<td>Performance Management Architect works with the following products:</td>
</tr>
<tr>
<td></td>
<td>- Planning</td>
</tr>
<tr>
<td></td>
<td>- Financial Management</td>
</tr>
<tr>
<td></td>
<td>- Oracle Essbase</td>
</tr>
<tr>
<td></td>
<td>- Profitability and Cost Management</td>
</tr>
<tr>
<td>Calculation Manager</td>
<td>Calculation Manager is a feature of Performance Management Architect. It provides the graphical interface for building and calculating business rules for Planning and Financial Management applications.</td>
</tr>
<tr>
<td>Product</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Oracle Hyperion Smart View for Office, Fusion Edition</td>
<td>Smart View provides a common Microsoft Office addin for various EPM System products - Essbase, Financial Management, Planning, and Reporting and Analysis. It can also import content from the Reporting and Analysis repository and can perform adhoc analysis on data from Oracle BI EE. Using Smart View, you can view, import, manipulate, distribute, and share data in Microsoft Excel, Word, and PowerPoint interfaces.</td>
</tr>
<tr>
<td>Oracle Smart Space, Fusion Edition</td>
<td>Smart Space is a personalized information delivery solution that includes gadgets designed specifically for Enterprise Performance Management and Business Intelligence. Smart Space consists of a set of configurable gadgets that run on the desktop, providing continuous access to content from Reporting and Analysis, Oracle Business Intelligence Publisher, Oracle BI Dashboards, Oracle BI Answers and Essbase. Smart Space also includes a development toolkit for creating additional gadgets by using common development languages and methodologies, and a secure instant messaging system for shared decision making.</td>
</tr>
</tbody>
</table>

### Essbase

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essbase</td>
<td>Essbase is the business analysis server technology that provides an environment for rapid development of custom analytic and enterprise performance management applications. For example, Essbase enables line-of-business personnel to develop and manage analytic applications that model complex scenarios, forecast business trends, and perform &quot;what-if&quot; analyses. Essbase supports extremely fast query response times for vast numbers of users, for large data sets, and for complex business models. It is hot-pluggable across any data source.</td>
</tr>
<tr>
<td>Oracle Essbase Administration Services</td>
<td>Administration Services is the cross-platform administration tool for Essbase. It consists of Administration Server (a Java middle-tier server), and Essbase Administration Services Console (a thin-client console).</td>
</tr>
<tr>
<td>Oracle's Hyperion® Business Rules</td>
<td>Business Rules, which is installed and configured as part of Administration Services, guides users through the creation, execution, and management of business rules on the Essbase Server component of Essbase. Business Rules improves the response time to changing business application needs, shortens application development cycles, increases business user productivity, improves re-use of application components, and increases the overall return on analytic application investments. Classic Planning works with Business Rules.</td>
</tr>
<tr>
<td>Oracle Essbase Integration Services</td>
<td>Integration Services provides a suite of graphical tools that can be used to create Essbase databases, OLAP models, and metaoutlines.</td>
</tr>
</tbody>
</table>
Product Description

Oracle Hyperion Provider Services

Provider Services is a middle-tier data-source provider to the following products:
- Essbase
- Planning
- Oracle BI EE
- Smart View for Office, Java API (Essbase data only)
- XMLA clients (Essbase data only)

The software supports highly concurrent analytical scenarios and provides scalability and reliability in a distributed Web-enabled enterprise environment.

Oracle Hyperion Smart Search, Fusion Edition

Smart Search integrates with leading enterprise search solutions (Google Search Appliance and Oracle Secure Enterprise Search) to provide a familiar search interface. Using simple business terminology, users can obtain structured information from Essbase applications and databases. Information filtered according to user privileges is delivered in data grids and live links in Smart View for Office.

Oracle Essbase Studio

Essbase Studio consolidates cube-construction activities into one interface, enabling consistent performance for data load and outline build.

Oracle’s Hyperion® Application Builder for .NET

Application Builder for .NET provides a comprehensive set of OLAP-aware classes for data navigation, selection, reporting, and visualization to assist you in building custom analytical applications. Application Builder for .NET provides an application development workbench for companies wanting to use the Microsoft .NET Framework to create tailored business performance management solutions. Application Builder for .NET includes the following key features:
- .NET Framework compatibility
- Web Services-based architecture (SOAP)

Reporting and Analysis

Product Description

Oracle’s Hyperion® Interactive Reporting

Interactive Reporting provides intuitive user-directed query and analysis capabilities. This business intelligence software delivers these capabilities through an interface that enables users to design dashboards, and then monitor and navigate to relevant information.

Oracle Hyperion Financial Reporting, Fusion Edition

Financial Reporting enables generation of formatted, book-quality financial and management reports that comply with regulations and external requirements. Financial Reporting can help you control and increase operational efficiencies.
### Oracle's Hyperion® SQR® Production Reporting

Production Reporting generates high-volume, presentation-quality formatted reports and provides unparalleled performance—even when the data comes from disparate sources. Production Reporting delivers the business context for key metrics by consolidating information from core business applications throughout the enterprise.

### Oracle's Hyperion® Web Analysis

Web Analysis delivers online analytical processing (OLAP) analysis, presentation, and reporting for the extended enterprise.

## Financial Performance Management Applications

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning</td>
<td>Planning is a centralized planning, budgeting, and forecasting solution that integrates financial and operational planning processes. Planning provides an in-depth look at business operations and their impact on financials by tightly integrating financial and operational planning models. With Planning, you can meet your immediate financial planning needs and also enable future cross-functional expansion and automated process integration. Planning administrators can create two types of applications: Classic Planning applications, which use Business Rules, and Performance Management Architect Planning applications, which use Calculation Manager business rules.</td>
</tr>
<tr>
<td>Financial Management</td>
<td>Financial Management is a comprehensive financial systems software application that delivers global collection reporting and analysis in a single, highly scalable solution. Financial Management uses today's most advanced technology, yet it is built to be owned and maintained by the enterprise's finance team. Financial Management users can create applications by using Performance Management Architect or Financial Management Classic.</td>
</tr>
<tr>
<td>Performance Scorecard</td>
<td>Performance Scorecard is a Balanced Scorecard Collaborative certified application that helps companies clearly articulate strategy and goals, communicate them across the enterprise, and monitor key performance indicators. The software offers you complete strategy- and accountability-mapping capabilities, as well as Web-based message boards, forums, and discussion threads.</td>
</tr>
<tr>
<td>Oracle Hyperion Strategic Finance, Fusion Edition</td>
<td>Strategic Finance is a financial modeling application that enables executives to identify and understand the full financial impact of alternative corporate strategies. Strategic Finance delivers pre-packaged modeling and forecasting so your finance experts have more time for testing alternative strategies, building contingency plans, and understanding the impact of those strategies and plans on your company’s long-term performance.</td>
</tr>
</tbody>
</table>
### Profitability and Cost Management

Profitability and Cost Management is an analytic application for managing the cost and revenue allocations that are necessary to compute profitability for a business segment, such as a product, customer, region, or branch. The application enables you to use cost decomposition, consumption-based costing, and scenario playing to measure profitability, and it provides a meaningful operational decision-support system.

### Data Management

<table>
<thead>
<tr>
<th>Product</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle's Hyperion® Data Integration Management</td>
<td>Data Integration Management provides a way of uniting disparate data sources across an enterprise. For example, it can integrate data that is stored in multiple warehouses and data marts, relational database management systems (RDBMS), and online analytical processing (OLAP) stores.</td>
</tr>
<tr>
<td>Data Integration Management Adapters</td>
<td>Data Integration Management Adapters enable you to retrieve and write data for Essbase, Performance Scorecard, Financial Management, and Planning.</td>
</tr>
<tr>
<td>Oracle Hyperion Financial Data Quality Management, Fusion Edition</td>
<td>FDM is a packaged solution that, through its Web-based guided workflow, helps finance users to develop standardized financial data management processes. Its data preparation server can ease integration and validation of financial data from any source systems. To further reduce data integration costs and data mapping complexities, FDM includes EPM adapters for a variety of source and target systems.</td>
</tr>
<tr>
<td>Oracle Hyperion Data Relationship Management, Fusion Edition</td>
<td>Data Relationship Management enables enterprises to build consistency within master data assets despite endless changes within the underlying transactional and analytical systems. Data Relationship Management provides the industry's first data model-agnostic master data management solution built to enable financial and analytical master data management in dynamic, fast-changing business environments.</td>
</tr>
</tbody>
</table>

### Architecture

The following tables show the EPM System product architecture, organized by tier. For details about which components are installed on each tier, see the Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide.
## Foundation Services

<table>
<thead>
<tr>
<th>Product</th>
<th>Client Tier</th>
<th>Web Application Tier</th>
<th>Services Tier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Web Server*</td>
<td>Web Application Server</td>
</tr>
<tr>
<td>Shared Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>EPM Workspace</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Performance Management Architect</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Calculation Manager</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>Smart View for Office</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Smart Space</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

*If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.

## Essbase

<table>
<thead>
<tr>
<th>Product</th>
<th>Client Tier</th>
<th>Web Application Tier</th>
<th>Services Tier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Web Server*</td>
<td>Web Application Server</td>
</tr>
<tr>
<td>Essbase</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Administration Services</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Integration Services</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Provider Services</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Smart Search</td>
<td></td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Essbase Studio</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Application Builder for .NET</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
</tbody>
</table>

*If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.

## Reporting and Analysis

<table>
<thead>
<tr>
<th>Product</th>
<th>Client Tier</th>
<th>Web Application Tier</th>
<th>Services Tier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Web Server*</td>
<td>Web Application Server</td>
</tr>
<tr>
<td>Interactive Reporting</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Financial Reporting</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
### Financial Performance Management Applications

<table>
<thead>
<tr>
<th>Product</th>
<th>Client Tier</th>
<th>Web Application Tier</th>
<th>Services Tier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Web Server*</td>
<td>Web Application Server</td>
</tr>
<tr>
<td>Oracle's Hyperion® SQR® Production Reporting</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>Web Analysis</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

*If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.

### Data Management

<table>
<thead>
<tr>
<th>Product</th>
<th>Client Tier</th>
<th>Web Application Tier</th>
<th>Services Tier</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Web Server*</td>
<td>Web Application Server</td>
</tr>
<tr>
<td>Data Integration Management</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Data Integration Management Adapters</td>
<td>X</td>
<td></td>
<td>X</td>
</tr>
<tr>
<td>FDM</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Data Relationship Management</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>

*If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.
In This Chapter

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Overview

This chapter describes system requirements for EPM System products. Requirements for EPM System product clients and Foundation Services are presented first, followed by sections that present requirements for each product family. Products are grouped into families as described in Chapter 2, “EPM System Product Deployment.”

In this chapter, specification of a range of releases indicates that all releases within the specified range are supported. For example, for the Oracle database, all releases and interim releases between 9.2.0.5 and 11g (11.1.0.6.0) are supported.

For information on other prerequisites, see Chapter 5, “Installation Planning Checklist.”

For information on current and backward compatibility with other EPM System products, see Chapter 4, “Release Compatibility.”

Note:

Oracle acknowledges and supports the backward compatibility assertions made by third-party vendors. Therefore, where vendors assert backward compatibility, subsequent maintenance releases and service packs may be used. If an incompatibility is identified, Oracle will specify a patch release on which the product should be deployed (and remove the incompatible version from the supported matrix) or provide a maintenance release or service fix to the Oracle product code.

Client Requirements

EPM System client components have the following system requirements:
• General requirements:
  ❍ “Client Operating Systems” on page 18
  ❍ “Screen Resolution” on page 18
  ❍ “Runtime Clients” on page 18
  ❍ “Disk Space and RAM” on page 19

• Web browser client requirements
  ❍ “Web Browsers” on page 20
  ❍ “Web Browser JRE Plug-in” on page 21
  ❍ “Java Runtime Environment” on page 21

• Third-party requirements
  ❍ “Other Third-Party Software” on page 22

### Client Operating Systems

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Processor*</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Windows Vista (all editions except Home series)</td>
<td>x86-32</td>
<td>Windows 2003 SP1 also supports x86-64.†</td>
</tr>
<tr>
<td>• Windows XP Professional SP2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Windows Server 2003 SP1 (R2 is also supported)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*1.6 GHz minimum is required. 2 GHz minimum is required for Data Relationship Management.  †FDM Workbench Client does not support x86-64.

**Note:**

The Essbase client and Essbase Administration Services Console have both 64-bit and 32-bit binaries. All other clients have only 32-bit binaries. For detailed information, see “32-Bit and 64-Bit Client and Server Compatibility” on page 29.

### Screen Resolution

EPM System products are optimized for a minimum screen resolution of 1024 x 768.

### Runtime Clients

Some EPM System clients require the runtime clients of other EPM System or third-party products. EPM System runtime client and server versions must match.

For information on EPM System product interoperability, see Chapter 4, “Release Compatibility.”
<table>
<thead>
<tr>
<th>Runtime Client</th>
<th>Required For</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Essbase—The Essbase runtime client is installed automatically.</td>
<td>● Financial Reporting</td>
</tr>
<tr>
<td>● Microsoft SQL Server 2000 SP3a Analysis Services</td>
<td>● Interactive Reporting</td>
</tr>
<tr>
<td>● Microsoft SQL Server 2005 SP1 Analysis Services</td>
<td>● Production Reporting</td>
</tr>
<tr>
<td>● Financial Management—The version of the Financial Management ADM driver and the version of Financial Management that is used for Financial Reporting and Web Analysis must match.</td>
<td>● Web Analysis</td>
</tr>
<tr>
<td>● Planning—The Planning ADM driver must be installed on all Financial Reporting server machines; it is a component in the Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition.</td>
<td></td>
</tr>
</tbody>
</table>

Essbase—The Essbase runtime client is installed automatically.

### Disk Space and RAM

This section does not apply to Web browser clients.

Disk space and RAM requirements are approximate. The installation program calculates the required disk space, based on your installation choices.

The recommended RAM requirement for all clients is 1 GB.

<table>
<thead>
<tr>
<th>Product Family</th>
<th>Component</th>
<th>Disk Space (Minimum)*</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPM System Installer</td>
<td>EPM System Installer and all EPM System product assemblies</td>
<td>8 GB</td>
<td>After installation, the installation files and assemblies can be removed.</td>
</tr>
<tr>
<td>Foundation Services</td>
<td>Common client components</td>
<td>200 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Smart View for Office</td>
<td>50 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Smart Space Client</td>
<td>200 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Smart Space Administration Utility</td>
<td>40 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Performance Management Architect</td>
<td>10 MB</td>
<td>File generator and batch client components only</td>
</tr>
<tr>
<td>Essbase</td>
<td>Essbase Runtime Client</td>
<td>75 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Essbase Administration Services Console</td>
<td>150 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Essbase Integration Services Console</td>
<td>45 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Essbase Studio Console</td>
<td>40 MB</td>
<td></td>
</tr>
<tr>
<td>Product Family</td>
<td>Component</td>
<td>Disk Space (Minimum)</td>
<td>Notes</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>----------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Oracle's Hyperion® Interactive Reporting Studio</td>
<td>350 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Oracle's Hyperion® Dashboard Development Services</td>
<td>95 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Oracle's Hyperion® SQR® Production Reporting Studio</td>
<td>45 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Oracle's Hyperion® SQR® Production Reporting Activator</td>
<td>15 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Production Reporting Remote</td>
<td>5 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Production Reporting Viewer</td>
<td>20 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Oracle's Hyperion® Web Analysis Studio</td>
<td>20 MB</td>
<td></td>
</tr>
<tr>
<td>Financial Performance Management Applications</td>
<td>Offline Planning</td>
<td>140 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Financial Management Client</td>
<td>50 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Strategic Finance Client</td>
<td>250 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Oracle Hyperion Strategic Finance Reader</td>
<td>250 MB</td>
<td></td>
</tr>
<tr>
<td>Oracle's Data Management</td>
<td>FDM Workbench</td>
<td>510 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Data Relationship Management Client</td>
<td>20 MB</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Hyperion® System™ 9 Data Integration Management™ BPM Adapters</td>
<td>15 MB</td>
<td>175 MB for Oracle's Hyperion® Data Integration Management Adapter for Essbase® (not including Essbase Runtime Client)</td>
</tr>
</tbody>
</table>

*Disk space does not include the common client components installed on the machine with Foundation Services.

**Web Browsers**

A Web browser is required for:
• Shared Services
• EPM Workspace
• Performance Management Architect
• Smart Space (required only for installation)
• Application Builder for .NET
• Reporting and Analysis
• Planning
• Financial Management
• Performance Scorecard
• Profitability and Cost Management
• Strategic Finance (required only for drill-back to FDM)
• FDM
• Data Relationship Management (required only for Web Publishing and Migration Utility)

<table>
<thead>
<tr>
<th>Supported Web Browsers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft Internet Explorer 6.0 – 7.0.x</td>
<td></td>
</tr>
</tbody>
</table>
| Firefox 2.0.x | The following products do not support Firefox:  
  • Smart Space*  
  • Application Builder for .NET  
  • Performance Scorecard  
  • FDM  
  • Data Relationship Management (Web Publishing)  
  Smart View does not support Web Launch from applications running on Firefox. |

*Internet Explorer must be used for Smart Space installation; Firefox does not support ClickOnce installation technology.

Set your browser to enable JavaScript and cookies. Storing cookies on your computer is recommended; at a minimum, allow per-session (not stored) cookies. For more information on browser prerequisites, see “Preparing Web Browsers” on page 83.

**Web Browser JRE Plug-in**

<table>
<thead>
<tr>
<th>Supported Versions</th>
<th>Required For</th>
</tr>
</thead>
<tbody>
<tr>
<td>JRE 1.5.0_12 to 1.5.0_12+</td>
<td></td>
</tr>
</tbody>
</table>
  • Web Analysis  
  • Performance Scorecard |

**Java Runtime Environment**

JRE is installed automatically with the products that require it.
## System Requirements

<table>
<thead>
<tr>
<th>Platform</th>
<th>Processor</th>
<th>Supported Windows Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>32-bit</td>
<td>x86</td>
<td>JRE 1.5.0 Update 12</td>
</tr>
</tbody>
</table>

### Other Third-Party Software

<table>
<thead>
<tr>
<th>Supported Software</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft .NET Framework 2.0</td>
<td>Required only for Smart Space.</td>
</tr>
<tr>
<td>Adobe Acrobat Reader 6.0 or later</td>
<td></td>
</tr>
<tr>
<td>DCOM enabled on the client computer</td>
<td>Required only for Financial Management when the Financial Management Win32 client is running or when the Financial Reporting client is running against a Financial Management application.</td>
</tr>
</tbody>
</table>

One of the following:
- Microsoft Office 2007
- Microsoft Office 2003
- Microsoft Office XP (2002)

A version of Microsoft Excel is required to use Smart View and Offline Planning with:
- Reporting and Analysis
- Financial Management
- Planning
- Essbase

Strategic Finance also requires a version of Excel.

Microsoft SQL Server (2005 SP1 or 2000 SP3a) Analysis Services client
Optional—used to connect to Microsoft SQL Server Analysis Services datasources.

Required only for:
- Interactive Reporting
- Financial Reporting†
- Web Analysis

- SAP GUI 6.20 OLE DB for OLAP Provider
- SAP GUI 6.4 OLE DB for OLAP Provider

Required only for Interactive Reporting

SAP Java Connector (JCO) 2.1.7‡
Optional—used to connect to SAP BW

Required only for:
- Financial Reporting
- Production Reporting
- Web Analysis

---

### Foundation Services

This section lists the requirements for:
- Shared Services

---

*Offline Planning and Excel must be installed on the same machine.
†Microsoft SQL Server Analysis Services is supported only by Financial Reporting on Windows. The SSAS client and SSAS server versions must match.
‡Configure the SAP data source access and authentication after installation, when Reporting and Analysis creates the correct SAP directories. Download it as a registered user at [https://service.sap.com/connectors](https://service.sap.com/connectors).
- EPM Workspace
- Performance Management Architect
- Calculation Manager
- Smart Space

**Note:**
Requirements for Smart View and other client software are listed in “Client Requirements” on page 17.

### Server Operating System/Processor

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Processor</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 2003 SP1 (R2 is also supported)</td>
<td>x86-32 32-bit</td>
<td></td>
</tr>
<tr>
<td>Windows 2003 SP1, Server Enterprise x64 Edition (R2 is also supported)</td>
<td>x86-64 64-bit</td>
<td></td>
</tr>
</tbody>
</table>

**Note:**
Oracle VM 2.1 for Linux and Windows is supported as a virtualized environment. For information on support for Oracle’s EPM System products in third-party virtualized environments, see Metalink Note 562663.1.

### Disk Space and RAM

Disk space and RAM requirements are approximate and do not include additional possible requirements on the machine. The installation program calculates the required disk space, based on your installation choices. Disk space estimates include documentation help files (if applicable) and EPM System common components.

<table>
<thead>
<tr>
<th>Component</th>
<th>Disk Space (Minimum)</th>
<th>RAM (Minimum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Services</td>
<td>400 MB*</td>
<td>1.5 GB</td>
</tr>
<tr>
<td>EPM Workspace</td>
<td>1 GB For services: 200 MB For importing files: 1 GB</td>
<td>1 GB For services: 1 GB</td>
</tr>
<tr>
<td>Performance Management Architect</td>
<td>50 MB</td>
<td>1 GB for Dimension Server 512 MB each for Web Tier and Data Synchronizer</td>
</tr>
<tr>
<td>Component</td>
<td>Disk Space (Minimum)</td>
<td>RAM (Minimum)</td>
</tr>
<tr>
<td>-------------------</td>
<td>----------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Calculation Manager</td>
<td>20 MB</td>
<td>256 MB</td>
</tr>
<tr>
<td>Smart Space</td>
<td>600 MB</td>
<td>1 GB</td>
</tr>
</tbody>
</table>

*This number is for the base Shared Services installation. More disk space is required based on OpenLDAP (Native Directory) usage for provisioning (depending on how often you back up OpenLDAP) and on Lifecycle Management usage. If using Lifecycle Management functionality, Oracle recommends that you significantly increase disk space because application data is stored in the Shared Services file system.

**Note:**

When deploying all EPM System products to WebLogic application server on one machine, 6 GB of RAM is recommended.

**EPM System Software**

The following table indicates the Foundation Services components that are required for other EPM System products.

<table>
<thead>
<tr>
<th>Required Component</th>
<th>Required For</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Services</td>
<td>All products except Data Integration Management</td>
<td>Not required if using native authentication for:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Essbase</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Data Relationship Management</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● FDM</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> Shared Services is required if using these products with other EPM System products that require Shared Services.</td>
</tr>
<tr>
<td>EPM Workspace</td>
<td>● Performance Management Architect (includes Calculation Manager)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Planning</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Financial Management</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Performance Scorecard</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Profitability and Cost Management</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● All Reporting and Analysis components</td>
<td></td>
</tr>
<tr>
<td>Performance Management Architect</td>
<td>● Calculation Manager</td>
<td>Optional for use with:</td>
</tr>
<tr>
<td></td>
<td>● Profitability and Cost Management</td>
<td>● Planning</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Financial Management</td>
</tr>
</tbody>
</table>
Other Third-Party Software

<table>
<thead>
<tr>
<th>Third-Party Software</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Microsoft .NET Framework 2.0</td>
<td>Required only for Performance Management Architect; if not present, installed automatically by EPM System Installer.</td>
</tr>
</tbody>
</table>

Repository Databases

A repository database is required for:

- Shared Services
- EPM Workspace
- Performance Management Architect
- Calculation Manager
- Smart Space Collaborator Account

<table>
<thead>
<tr>
<th>Supported Relational Database Repositories</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Database 9.2.0.5 – 11g (11.1.0.6.0)*</td>
<td>For Performance Management Architect, the Oracle Database client must be installed on the Dimension Server machine.</td>
</tr>
<tr>
<td>IBM DB2 8.2 FP4 – 9.1x</td>
<td>If you use an IBM DB2 database for Performance Management Architect, DB2 9 Runtime Client and DB2 .NET Data Provider 9.1.0.2 must be installed on the Dimension Server machine.</td>
</tr>
<tr>
<td>Microsoft SQL Server 2000 SP3a – 2005†</td>
<td></td>
</tr>
</tbody>
</table>

*For all supported versions of Oracle Database: Includes support for RAC - Real Application Cluster and ASM. (1) Includes support for SE, SE1, EE. The Oracle OLE provider and Oracle Database server must be the same version.
†By default, SQL Server 2005 disables TCP/IP connections to the database. Ensure that the TCP/IP connections are enabled.

Web Application Servers

If an application contains more than 500 users and 10,000 measures, consider deploying to a Web application server cluster for increased scalability. For information on application server clustering, see Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide.

A Web application server is required for:

- Shared Services
- EPM Workspace
- Performance Management Architect
- Calculation Manager
- Smart Space
Note:
Only 32-bit application servers are supported.

<table>
<thead>
<tr>
<th>Supported Web Application Servers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Application Server 10g (10.1.3.3.x)†</td>
<td>If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.</td>
</tr>
<tr>
<td>WebLogic 9.2 (MP1 minimum) - 9.2x†‡</td>
<td></td>
</tr>
<tr>
<td>IBM WebSphere 6.1.0.7 – 6.1.0.xδ</td>
<td></td>
</tr>
<tr>
<td>Apache Tomcat 5.5.17e</td>
<td></td>
</tr>
</tbody>
</table>

*Supports these editions: Java, Standard One, Standard & Enterprise. Includes support for Oracle Application Server Single Sign-On, for EPM Workspace only.
†WebLogic Express is supported for each supported version of WebLogic.
‡Shared Services requires WebLogic patch “CR283953” for all platforms. You can obtain this patch at the BEA web site.
δWebSphere Express, ND, and XD Editions are supported for each supported version of WebSphere.
eApache Tomcat is the embedded Java container that is installed automatically on all platforms. For deployments that require high availability or failover, Oracle recommends using a commercially supported Web application server that supports high availability and failover.

Web Servers/Plug-ins
A Web server is required for:
- Shared Services (required only if using Oracle Application Server, Oracle Single Sign-On, Oracle Access Manager, or Siteminder)
- EPM Workspace
- Performance Management Architect
- Calculation Manager

<table>
<thead>
<tr>
<th>Supported Web Servers</th>
<th>Supported Application Servers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle HTTP Server 10g (10.1.3.3.x)</td>
<td>● Oracle Application Server</td>
<td></td>
</tr>
<tr>
<td>Apache HTTP Server 2.0.61</td>
<td>● Tomcat&lt;br&gt;● WebLogic&lt;br&gt;● WebSphere</td>
<td></td>
</tr>
<tr>
<td>IBM HTTP Server 6.1</td>
<td>● WebSphere</td>
<td></td>
</tr>
<tr>
<td>Microsoft IIS 6.0 (on Windows 2003 SP1)</td>
<td>● Oracle Application Server&lt;br&gt;● WebLogic&lt;br&gt;● WebSphere&lt;br&gt;● Tomcat</td>
<td></td>
</tr>
</tbody>
</table>
Note:
If IIS is chosen as the Web server during configuration, you must allow all unknown ISAPI extensions via the Internet Information Services Manager.

User Directories and Identity/Access Management Systems

A user directory is required for external authentication through Shared Services.

Note:
The Kerberos protocol can be used to secure the EPM System product environment. For detailed information, see Oracle Hyperion Enterprise Performance Management System Security Administration Guide.

<table>
<thead>
<tr>
<th>User Directories</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lightweight Directory Access Protocol (LDAP):</td>
<td></td>
</tr>
<tr>
<td>● IBM Tivoli Directory Server 6.1</td>
<td></td>
</tr>
<tr>
<td>● Sun ONE 5.2 SP4</td>
<td></td>
</tr>
<tr>
<td>● Novell eDirectory 8.8</td>
<td></td>
</tr>
<tr>
<td>● OpenLDAP 2.3.37</td>
<td></td>
</tr>
<tr>
<td>Microsoft:</td>
<td>NTLM is not supported with Financial Management on 64-bit platforms.</td>
</tr>
<tr>
<td>● Microsoft Active Directory 2003</td>
<td></td>
</tr>
<tr>
<td>● Microsoft Active Directory 2000</td>
<td></td>
</tr>
<tr>
<td>● Microsoft NTLM*</td>
<td></td>
</tr>
<tr>
<td>SAP Directory:</td>
<td>Applies only to:</td>
</tr>
<tr>
<td>● Enterprise Portal 6 SP16 or 7.0</td>
<td>● Shared Services</td>
</tr>
<tr>
<td>● Netweaver BI (SAP BW) 3.5 or 7.0</td>
<td>● Reporting and Analysis</td>
</tr>
<tr>
<td>● SAP R/3 Enterprise 5.0</td>
<td></td>
</tr>
<tr>
<td>Database providers:</td>
<td></td>
</tr>
<tr>
<td>● Oracle 9.2.0.5 – 11g (11.1.0.6.0)†</td>
<td></td>
</tr>
<tr>
<td>● IBM DB2 9.1 – 9.1x‡</td>
<td></td>
</tr>
<tr>
<td>● Microsoft SQL Server 2000 SP3a – 2005 SP1</td>
<td></td>
</tr>
</tbody>
</table>

*If using 64-bit Windows Essbase with NTLM, you must install Remote Authentication Module (HRAM) on a 32-bit machine and proxy the NTLM calls using that HRAM instance from the 64-bit machine.
†For high load conditions (10 or more logins per second), Oracle recommends a minimum of 4 GB of memory on the machine that hosts the Oracle database used as the provider. For conditions with 5 logins per second, 2 GB of memory is sufficient.
‡IBM DB2 9.1 is the same as 8.2 (FP4).

The following identity management systems are supported:
### Identity and Access Management Systems

<table>
<thead>
<tr>
<th>Directory Services:</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Oracle Internet Directory 10.1.4.0.1 and higher</td>
<td>Oracle Internet Directory is supported as an external user directory and as the Shared Services Native Directory. See Oracle Hyperion Enterprise Performance Management System Security Administration Guide.</td>
</tr>
<tr>
<td>● Oracle Virtual Directory 10.1.4.0.1 and higher</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Access Management:</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Oracle Access Manager 10.1.4.0.1 and higher</td>
<td>Not supported for FDM.</td>
</tr>
<tr>
<td>● Oracle Application Server Single Sign-On</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Identity Management:</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Identity Manager 10.1.4.0.1 and higher</td>
<td>Not supported for FDM.</td>
</tr>
</tbody>
</table>

| Netegrity SiteMinder 6 | Not supported by FDM or Strategic Finance |

### Essbase

This section lists the requirements for:

- Essbase
- Administration Services
- Integration Services
- Provider Services
- Essbase Studio
- Smart Search
- Application Builder for .NET

**Note:**
Requirements for client software are listed in “Client Requirements” on page 17.

### Server Operating System/Processor

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Processor</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 2003 SP1 (R2 is also supported)</td>
<td>x86-32 32-bit</td>
<td></td>
</tr>
<tr>
<td>Windows 2003 SP1, Server Enterprise x64 Edition (R2 is also supported)</td>
<td>x86-64 64-bit</td>
<td>Applies only to 64-bit Essbase and Administration Services. Other component binaries are 32-bit.</td>
</tr>
</tbody>
</table>
Note:
Oracle VM 2.1 for Linux and Windows is supported as a virtualized environment. For information on support for Oracle's EPM System products in third-party virtualized environments, see Metalink Note 562663.1.

32-Bit and 64-Bit Client and Server Compatibility

The following table summarizes the compatibility of 32-bit and 64-bit clients and servers with Essbase Server:

<table>
<thead>
<tr>
<th>Client</th>
<th>Server</th>
<th>Essbase Server: Platform to Which Client Can Connect</th>
</tr>
</thead>
<tbody>
<tr>
<td>32-bit Essbase Administration Services Console</td>
<td>32-bit Administration Server</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>32-bit Essbase Administration Services Console</td>
<td>64-bit Administration Server</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>64-bit Essbase Administration Services Console</td>
<td>64-bit Administration Server</td>
<td>64-bit</td>
</tr>
<tr>
<td>32-bit Essbase Integration Services Console</td>
<td>32-bit Essbase Integration Server</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>32-bit Essbase Integration Services Console</td>
<td>64-bit Essbase Integration Server</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>32-bit Smart View</td>
<td>32-bit Provider Services</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>32-bit Smart View</td>
<td>64-bit Provider Services</td>
<td>64-bit</td>
</tr>
<tr>
<td>32-bit Essbase Administration Services Console</td>
<td>32-bit Provider Services</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>64-bit Essbase Administration Services Console</td>
<td>64-bit Provider Services</td>
<td>64-bit</td>
</tr>
<tr>
<td>32-bit Java API or XMLA client application</td>
<td>32-bit Provider Services</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>64-bit Java API or XMLA client application</td>
<td>64-bit Provider Services</td>
<td>64-bit</td>
</tr>
</tbody>
</table>

API Compatibility on 32-Bit and 64-Bit Platforms

Essbase provides APIs for 32-bit and 64-bit platforms, which you can use to write and compile client programs that interface with Essbase Server.

- Client programs developed on 32-bit platforms using the Essbase C API or Visual Basic API can run on 32-bit platforms and connect to either 32-bit or 64-bit Essbase Server.
- Client programs developed on 32-bit platforms using the Essbase Visual Basic API can run on 64-bit Windows platforms and connect to 64-bit Essbase Server, as long as the 32-bit runtime environment is set up as according to the documented instructions.
Client programs developed on 64-bit platforms using the Essbase C API:

- Can run on 64-bit platforms and connect to 64-bit Essbase Servers
- Cannot run on 32-bit platforms and cannot connect to 32-bit Essbase Servers

**Caution!**

Client programs developed on 64-bit platforms do not require the #pragma directive to set the byte alignment.

You cannot develop a client program on 64-bit Windows using the Essbase Visual Basic API.

The following table summarizes the compatibility of client programs developed with Essbase APIs:

<table>
<thead>
<tr>
<th>Client Development: Platform with API Version</th>
<th>Platform on which Client Can Run</th>
<th>Essbase Server: Platforms to Which Client Can Connect</th>
</tr>
</thead>
<tbody>
<tr>
<td>32-bit C API</td>
<td>32-bit</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>32-bit VB API</td>
<td>32-bit Windows</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td></td>
<td>64-bit Windows</td>
<td>64-bit</td>
</tr>
<tr>
<td>32-bit Java API or XMLA client application</td>
<td>32-bit Provider Services server</td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>32-bit embedded Java API client application</td>
<td></td>
<td>32-bit, 64-bit</td>
</tr>
<tr>
<td>64-bit C API</td>
<td>64-bit</td>
<td>64-bit</td>
</tr>
<tr>
<td>64-bit Java API or XMLA client application</td>
<td>64-bit Provider Services server</td>
<td>64-bit</td>
</tr>
<tr>
<td>64-bit embedded Java API client application</td>
<td></td>
<td>64-bit</td>
</tr>
</tbody>
</table>

For information on the compatibility of 32-bit and 64-bit EPM System clients and servers with Essbase Server, see “32-Bit and 64-Bit Client and Server Compatibility” on page 29.

**Disk Array Support**

For data storage and binary installation, Essbase supports the use of any disk array device that is mounted with a local file system interface (for example, NTFS, HPFS, JFS, VxFS, and UFS). A disk array mounted using NFS or CIFS is not supported.

**Disk Space and RAM**

Disk space and RAM requirements are approximate and do not include additional possible requirements on the machine. The installation program calculates the required disk space, based
on your installation choices. Disk space estimates include documentation help files (if applicable) and EPM System common components.

<table>
<thead>
<tr>
<th>Component</th>
<th>Disk Space (Minimum)</th>
<th>RAM (Minimum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essbase Server</td>
<td>1 GB</td>
<td>1 GB</td>
</tr>
<tr>
<td>Application Programming Interface</td>
<td>20 MB</td>
<td>256 MB</td>
</tr>
<tr>
<td>Administration Services</td>
<td>500 MB*</td>
<td>32 MB multiplied by the number of concurrent Administration Server users For example, 32 MB * 10 users = 320 MB</td>
</tr>
<tr>
<td>Essbase Integration Server</td>
<td>170 MB</td>
<td>256 MB</td>
</tr>
<tr>
<td>Provider Services</td>
<td>340 MB</td>
<td>340 MB</td>
</tr>
<tr>
<td>Essbase Studio Server</td>
<td>60 MB</td>
<td>256 MB</td>
</tr>
</tbody>
</table>

*Allow extra disk space for data files and outline files that are copied to Administration Server during data loading and outline editing, respectively.

**Note:**

When deploying all EPM System products to WebLogic application server on one machine, 6 GB of RAM is recommended.

### Member Load Memory Requirements for Integration Services

<table>
<thead>
<tr>
<th>Platform</th>
<th>Windows</th>
</tr>
</thead>
<tbody>
<tr>
<td>32-bit</td>
<td>10 MB + (700 bytes * number of members)</td>
</tr>
<tr>
<td>64-bit</td>
<td>20 MB + (900 bytes * number of members)</td>
</tr>
</tbody>
</table>

### EPM System Software

<table>
<thead>
<tr>
<th>Required Software</th>
<th>Required For</th>
</tr>
</thead>
</table>
| Shared Services   | ● Essbase (unless using Essbase in native security mode)  
|                   | ● Administration Services  
|                   | ● Essbase Studio  
|                   | ● Smart Search  |
| Essbase           | ● Administration Services  
|                   | ● Integration Services  
|                   | ● Smart Search  
<p>|                   | ● Essbase Studio  |
| Administration Services | ● Provider Services  |</p>
<table>
<thead>
<tr>
<th>Required Software</th>
<th>Required For</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Essbase Studio</td>
<td></td>
</tr>
<tr>
<td>Provider Services</td>
<td>Smart View</td>
</tr>
</tbody>
</table>

**Note:**

Provider Services integrates with Essbase, Administration Services, and Shared Services but is not required.

**Note:**

For information about which releases of these required products are compatible with the current release of Essbase, see Chapter 4, “Release Compatibility.”

## Repository Databases

A repository database is required for:

- Administration Services—only when using Log Analyzer or Oracle’s Hyperion® Business Rules
- Essbase Studio
- Integration Services

### Supported Relational Database Repositories

- Oracle 9i (9.2.0.5) – 11g (11.1.0.6.0)*
- IBM DB2 8.2 FP4†
- IBM DB2 9.1x
- Microsoft SQL Server 2005‡
- Microsoft SQL Server 2000 SP3a

*For all supported versions of Oracle Database: Includes support for RAC - Real Application Cluster and ASM. Includes support for SE, SE1, EE. The Oracle OLE provider and Oracle Database server must be the same version.

†IBM DB2 8.2 FP4 is the same as 8.1 FP11

‡By default, SQL Server 2005 disables TCP/IP connections to the database. Ensure that the TCP/IP connections are enabled.

## Web Application Server

If an application contains more than 500 users and 10,000 measures, consider deploying to a Web application server cluster for increased scalability. For information about application server clustering, see the Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide.

A Web application server is required for:
Note:
Only 32-bit application servers are supported for auto-deployment in Oracle's Hyperion Enterprise Performance Management System Configurator. To deploy Administration Services or Provider Services to 64-bit application servers, install the 64-bit binaries for those products by using the option to install components individually in EPM System Installer, and then follow the manual deployment instructions in *Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide*.

<table>
<thead>
<tr>
<th>Supported Web Application Servers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Application Server 10g (10.1.3.3.x)*</td>
<td>If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.</td>
</tr>
<tr>
<td>WebLogic 9.2 (MP1 minimum) – 9.2.x†</td>
<td>Not supported for Smart Search</td>
</tr>
<tr>
<td>IBM WebSphere 6.1.0.7 – 6.1.0.x‡</td>
<td>Not supported for Oracle Hyperion Smart Search, Fusion Edition</td>
</tr>
<tr>
<td>Apache Tomcat 5.5.17d</td>
<td></td>
</tr>
</tbody>
</table>

*Supports these editions: Java, Standard One, Standard & Enterprise.
†WebLogic Express is supported for each supported version of WebLogic.
‡WebSphere Express, ND, and XD Editions are supported for each supported version of WebSphere.

Data Sources

The following sections list databases that are supported as data sources for Essbase product components.

**ODBC and JDBC Connectivity for Essbase Studio**

This section describes the supported ODBC and JDBC drivers for Essbase Studio.

**ODBC Drivers for Essbase Studio**

During cube deployment, when Essbase Studio is run in nonstreaming mode, Essbase Studio Server works with Essbase to query the external data source using an ODBC connection.

For server installations, confirm that you have ODBC drivers that are compatible with both the relational database and the operating system of the machine on which Essbase is installed. The Essbase installation includes ODBC drivers from DataDirect (MERANT). The drivers that work
with Performance Management Architect Dimension Server and flat files are also integrated in the Essbase installation. However, in some cases, it is recommended that you use the ODBC drivers provided by your relational database vendor.

<table>
<thead>
<tr>
<th>Relational Database</th>
<th>ODBC Driver (Windows)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle 11g (11.1.0.6.0); maximum version</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>Oracle 9i (9.2.0.5); minimum version</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>IBM DB2 UDB 9.1x; maximum version</td>
<td>SQL Server 2005 ODBC native driver†</td>
</tr>
<tr>
<td>IBM DB2 UDB 8.2 FP4; minimum version*</td>
<td>SQL Server 2000 ODBC native driver‡</td>
</tr>
<tr>
<td>Microsoft SQL Server 2005; maximum version</td>
<td>MySQL Connector/ODBC 3.51x and aboveef</td>
</tr>
<tr>
<td>Microsoft SQL Server 2000 SP3a; minimum version</td>
<td>Oracle BI Server ODBC 10.1.3.4 and above</td>
</tr>
<tr>
<td>MySQL 5.xd</td>
<td>Teradata 3.05 ODBCh</td>
</tr>
<tr>
<td>Oracle Business Intelligence Enterprise Edition (OBIEE) 10.1.3.4 and aboveg</td>
<td>Teradata 3.06 ODBCi</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Relational Database</th>
<th>ODBC Driver (Windows)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teradata V2R5.1</td>
<td>Teradata 3.06 ODBCi</td>
</tr>
<tr>
<td>Teradata V2R6.0 and later</td>
<td>Teradata 3.06 ODBCi</td>
</tr>
</tbody>
</table>

*DB2 8.2 FP4 is the equivalent of DB2 8.1 FP11.
†Microsoft SQL Server 2005 native driver must be obtained separately from Microsoft.
‡Microsoft SQL Server 2000 native driver must be obtained separately from Microsoft.
MySQL is supported as a data source, but not as an Essbase Studio catalog.
MySQL ODBC driver must be obtained separately from MySQL.
Essbase, Essbase Studio, and MySQL may each be installed on different machines; however, the MySQL ODBC driver must be installed on the machine where Essbase resides.
OBIEE is supported as a data source, but not as an Essbase Studio catalog.
Teradata ODBC drivers must be obtained separately from Teradata Corporation.
Teradata ODBC drivers must be obtained separately from Teradata Corporation.

**JDBC Drivers for Essbase Studio**

During cube deployment, when Essbase Studio is run in streaming mode, Essbase Studio Server uses JDBC drivers to query the external data source directly.

Most JDBC drivers are installed automatically when you install Essbase Studio. Oracle, IBM DB2, Microsoft SQL Server, and Teradata drivers are installed automatically during the installation of Essbase Studio Server.

The MySQL JDBC driver library file (mysql-connector-java.jar) is not included in the installation. You must download the file from the MySQL web site. Copy the file to the Essbase Studio server directory in $HYPERION_HOME/products/Essbase/EssbaseStudio/Server. The MySQL JDBC driver version is 3.1.x and above.

The OBIEE JDBC driver library file is not included in the installation. You must download the file from the Oracle web site. Copy the file to the Essbase Studio server directory in $HYPERION_HOME/products/Essbase/EssbaseStudio/Server. The OBIEE version is 10.1.3.4 and above.
ODBC and JDBC Connectivity for Integration Services

This section describes the supported ODBC and JDBC drivers for Integration Services.

**ODBC Drivers for Integration Services**

For server installations, confirm that you have ODBC drivers that are compatible with both the relational database and the operating system of the server on which Integration Services is installed. Integration Services includes ODBC drivers from DataDirect (MERANT). However, in some cases, it is recommended that you use the ODBC drivers provided by your relational database vendor.

<table>
<thead>
<tr>
<th>Relational Database</th>
<th>Windows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle 11g (11.1.0.6.0); maximum version</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>Oracle 9i (9.2.0.5); minimum version</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>IBM DB2 UDB 9.1.x</td>
<td>IBM DB2 UDB 8.2 FP4*</td>
</tr>
<tr>
<td>IBM DB2 UDB 8.2.7a</td>
<td>IBM DB2 v7x for z/OS†</td>
</tr>
<tr>
<td>Microsoft SQL Server 2005; maximum version</td>
<td>SQL Server 2005 ODBC native driver‡</td>
</tr>
<tr>
<td>Microsoft SQL Server 2000 SP3a; minimum version</td>
<td>SQL Server 2000 ODBC native driverd</td>
</tr>
<tr>
<td>MySQL 5.x e</td>
<td>MySQL Connector/ODBC 3.51x and abovef</td>
</tr>
<tr>
<td>Teradata V2R5.1g</td>
<td>Teradata 3.05 ODBCg</td>
</tr>
<tr>
<td>Teradata V2R6.0 and lateri</td>
<td>Teradata 3.06 ODBCi</td>
</tr>
<tr>
<td>Teradata 12.0.xk</td>
<td>Teradata 12.0 ODBC1</td>
</tr>
</tbody>
</table>

*DB2 8.2 FP4 is the equivalent of DB2 8.1 FP11.
†IBM DB2 v7x for z/OS is supported as data source, but not for OLAP Metadata Catalog.
‡Microsoft SQL Server 2005 native driver must be obtained separately from Microsoft.
§Microsoft SQL Server 2000 native driver must be obtained separately from Microsoft.
eMySQL is supported for OLAP Metadata Catalog, but not as a data source.
fMySQL ODBC driver must be obtained separately from MySQL.
gTeradata is supported as a data source, but not as an OLAP Metadata Catalog.
hTeradata ODBC drivers must be obtained separately from Teradata Corporation.
iTeradata is supported as a data source, but not as an OLAP Metadata Catalog.
jTeradata ODBC drivers must be obtained separately from Teradata Corporation.
kTeradata is supported as a data source, but not as an OLAP Metadata Catalog.
lTeradata ODBC drivers must be obtained separately from Teradata Corporation.
mTeradata is supported as a data source, but not as an OLAP Metadata Catalog.

**JDBC Drivers for Integration Services**

If you are using Teradata as an Integration Services data source, JDBC drivers are required. You must obtain the drivers separately from Teradata Corporation.
Note:

JDBC drivers are not supported for Integration Services on the 64-bit Itanium platform.

<table>
<thead>
<tr>
<th>Relational Database</th>
<th>JDBC Driver (Windows)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teradata V2R5.1*</td>
<td>03.01.00.10</td>
</tr>
<tr>
<td></td>
<td>03.03.00.06</td>
</tr>
<tr>
<td></td>
<td>03.04.00.03</td>
</tr>
<tr>
<td>Teradata V2R6.0 and later†</td>
<td>03.01.00.102</td>
</tr>
<tr>
<td></td>
<td>03.02.00.03</td>
</tr>
<tr>
<td>Teradata 12.0.x‡</td>
<td>12.00.00.01</td>
</tr>
</tbody>
</table>

*Obtain the driver separately from the Teradata web site
†Obtain the driver separately from the Teradata web site
‡Obtain the driver separately from the Teradata web site

**ODBC Drivers for Essbase SQL Interface**

This section describes the supported ODBC drivers for Essbase SQL Interface on 34-bit and 64-bit platforms.

**32-bit**

<table>
<thead>
<tr>
<th>Relational Database</th>
<th>Windows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle 10g (10.1.0.5)</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>Oracle 10g (10.1.0.3)</td>
<td></td>
</tr>
<tr>
<td>Oracle 9i (9.2.0.1)</td>
<td></td>
</tr>
<tr>
<td>IBM DB2 UDB 9.1x</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>IBM DB2 UDB 8.2 FP4*</td>
<td></td>
</tr>
<tr>
<td>IBM DB2 UDB 8.1.7a</td>
<td></td>
</tr>
<tr>
<td>IBM DB2 v7x for z/OS</td>
<td></td>
</tr>
<tr>
<td>Microsoft SQL Server 2005</td>
<td>SQL Server 2005 ODBC native driver†</td>
</tr>
<tr>
<td>Microsoft SQL Server 2000 SP3a</td>
<td>SQL Server 2000 ODBC native driver‡</td>
</tr>
<tr>
<td>Teradata V2R5.1</td>
<td>Teradata 3.05 ODBCd</td>
</tr>
<tr>
<td>Teradata V2R6.0 and later†</td>
<td>Teradata 3.06 ODBCe</td>
</tr>
<tr>
<td>Teradata 12.0.x‡</td>
<td>Teradata 12.0 ODBCf</td>
</tr>
</tbody>
</table>

*DB2 8.2 FP4 is the same as DB2 8.1 FP11.
†Microsoft SQL Server 2005 native driver must be obtained separately from Microsoft.
‡Microsoft SQL Server 2000 native driver must be obtained separately from Microsoft.
Teradata ODBC drivers must be obtained separately from Teradata Corporation.

### 64-bit

<table>
<thead>
<tr>
<th>Relational Database</th>
<th>Windows</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle 10g (10.1.0.5)</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>Oracle 10g (10.1.0.3)</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>Oracle 9i (9.2.0.1)</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>IBM DB2 9.1x</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>IBM DB2 UDB 8.2 FP4*</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>IBM DB2 UDB 8.1.7a</td>
<td>DataDirect Driver 5.2</td>
</tr>
<tr>
<td>Microsoft SQL Server 2005</td>
<td>SQL Server 2005 ODBC native driver†</td>
</tr>
<tr>
<td>Microsoft SQL Server 2000 SP3a</td>
<td>SQL Server 2000 ODBC native driver‡</td>
</tr>
<tr>
<td>Teradata V2R5.1</td>
<td>Teradata 3.05 ODBCd</td>
</tr>
<tr>
<td>Teradata V2R6.0 and later</td>
<td>Teradata 3.06 ODBCe</td>
</tr>
<tr>
<td>Teradata 12.0.x</td>
<td>Teradata 12.0 ODBCf</td>
</tr>
</tbody>
</table>

*8.2 FP4 is the same as 8.1 FP11.
†Microsoft SQL Server 2005 native driver must be obtained separately from Microsoft.
‡Microsoft SQL Server 2000 native driver must be obtained separately from Microsoft.
*dTeradata ODBC drivers must be obtained separately from Teradata Corporation.
†Teradata ODBC drivers must be obtained separately from Teradata Corporation.
‡Teradata ODBC drivers must be obtained separately from Teradata Corporation.

### Reporting and Analysis

This section lists the requirements for:

- Financial Reporting
- Interactive Reporting
- Production Reporting
- Web Analysis

**Note:**

Requirements for client software are listed in “Client Requirements” on page 17.
Server Operating System/Processor

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Processor</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 2003 SP1 (R2 is also supported)</td>
<td>x86-32</td>
<td></td>
</tr>
<tr>
<td></td>
<td>32-bit</td>
<td></td>
</tr>
<tr>
<td>Windows 2003 SP1, Server Enterprise x64 Edition</td>
<td>x86-64</td>
<td>Exception: Financial Reporting, Interactive Reporting, and Core Services binaries are 32-bit.</td>
</tr>
<tr>
<td>(R2 is also supported)</td>
<td>64-bit</td>
<td></td>
</tr>
</tbody>
</table>

Note:
Oracle VM 2.1 for Linux and Windows is supported as a virtualized environment. For information on support for Oracle’s EPM System products in third-party virtualized environments, see Metalink Note 562663.1.

Disk Space and RAM

Disk space and RAM requirements are approximate and do not include additional possible requirements on the machine. The installation program calculates the required disk space, based on your installation choices. Disk space estimates include documentation help files (if applicable) and EPM System common components.

<table>
<thead>
<tr>
<th>Component</th>
<th>Disk Space (Minimum)</th>
<th>RAM (Minimum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Reporting</td>
<td>200 MB</td>
<td>1 GB</td>
</tr>
<tr>
<td>Interactive Reporting</td>
<td>500 MB</td>
<td>1 GB</td>
</tr>
<tr>
<td>Production Reporting</td>
<td>200 MB</td>
<td>256 MB</td>
</tr>
<tr>
<td>Web Analysis</td>
<td>1 GB</td>
<td>1 GB</td>
</tr>
</tbody>
</table>

Note:
When deploying all EPM System products to WebLogic application server on one machine, 6 GB of RAM is recommended.

EPM System Software

<table>
<thead>
<tr>
<th>Required Component</th>
<th>Required For</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Services</td>
<td>All Reporting and Analysis components</td>
</tr>
<tr>
<td>EPM Workspace</td>
<td>All Reporting and Analysis components</td>
</tr>
</tbody>
</table>
Other Third-Party Software

<table>
<thead>
<tr>
<th>Required Software</th>
<th>Required For</th>
</tr>
</thead>
<tbody>
<tr>
<td>One of the following PDF generators:</td>
<td>Financial Reporting*</td>
</tr>
<tr>
<td>❍ Adobe Acrobat Distiller Server 8.0 or 6.0</td>
<td></td>
</tr>
<tr>
<td>❍ AFPL Ghostscript 8.54 or 8.51, or GNU Ghostscript 7.0.6</td>
<td></td>
</tr>
<tr>
<td>One of the following:</td>
<td>Interactive Reporting</td>
</tr>
<tr>
<td>❍ Microsoft SQL Server (2005 or 2000 SP3a) Analysis Services client—Windows only</td>
<td></td>
</tr>
<tr>
<td>❍ SAP GUI 6.20 OLE DB for OLAP Provider—Windows only</td>
<td></td>
</tr>
<tr>
<td>❍ SAP GUI 6.4 OLE DB for OLAP Provider—Windows only</td>
<td></td>
</tr>
<tr>
<td>One of the following:</td>
<td>Financial Reporting</td>
</tr>
<tr>
<td>❍ NetWeaver BI and SAP BW 7.0 connectivity require the use of SAP JCO 2.1.7</td>
<td></td>
</tr>
<tr>
<td>❍ For Microsoft SQL Server, you need Microsoft SQL Server (2005 or 2000 SP3a) Analysis Services. The SSAS client and SSAS server versions must match.</td>
<td>Production Reporting</td>
</tr>
<tr>
<td>SQL Grid connectivity (supports SQL Grid with Oracle Database, IBM DB2, and Microsoft SQL Server)—Merant drivers</td>
<td>Web Analysis</td>
</tr>
</tbody>
</table>

*For Financial Reporting, you must use Ghostscript, not Distiller, to import content into Microsoft Word and PowerPoint.

Repository Databases

A database repository is required for all Reporting and Analysis components.

Supported Relational Database Repositories

<table>
<thead>
<tr>
<th>Support Database Repositories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Database 9.2.0.5 – 11g (11.1.0.6.0)*</td>
</tr>
<tr>
<td>IBM DB2 8.2 FP4 – 9.1x</td>
</tr>
<tr>
<td>Microsoft SQL Server 2000 SP3a – 2005†</td>
</tr>
</tbody>
</table>

*For all supported versions of Oracle Database: Includes support for RAC - Real Application Cluster and ASM. Includes support for SE, SE1, EE. The Oracle OLE provider and Oracle Database server must be the same version.
†By default, SQL Server 2005 disables TCP/IP connections to the database. Ensure that the TCP/IP connections are enabled.

Web Application Servers

If an application contains more than 500 users and 10,000 measures, consider deploying to a Web application server cluster for increased scalability. For information about application server clustering, see Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide.

A Web application server is required for:

- Financial Reporting
- Web Analysis
**Note:**

Only 32-bit application servers are supported.

<table>
<thead>
<tr>
<th>Supported Web Application Servers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Application Server 10g (10.1.3.3.3.0)</td>
<td>If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.</td>
</tr>
<tr>
<td>WebLogic 9.2 (MP1 minimum) - 9.2.x</td>
<td></td>
</tr>
<tr>
<td>IBM WebSphere 6.1.0.7 – 6.1.0.x</td>
<td></td>
</tr>
<tr>
<td>Apache Tomcat 5.5.17e</td>
<td></td>
</tr>
</tbody>
</table>

*Supports these editions: Java, Standard One, Standard & Enterprise.

†WebLogic Express is supported for each supported version of WebLogic.

‡WebSphere Express, ND, and XD Editions are supported for each supported version of WebSphere.

For Reporting and Analysis, the IBM Global Security Kit 7 (GSKit7) is required for the WebSphere Web server plug-in.

*Apache Tomcat is the embedded Java container that is installed automatically on all platforms. For deployments that require high availability or failover, Oracle recommends using a commercially supported Web application server that supports high availability and failover.

### Web Servers/Plug-ins

A Web server is required for:

- Financial Reporting
- Web Analysis

<table>
<thead>
<tr>
<th>Supported Web Servers</th>
<th>Supported Application Servers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle HTTP Server 10g (10.1.3.3.0 and higher)</td>
<td>● Oracle Application Server</td>
<td></td>
</tr>
<tr>
<td>Apache HTTP Server 2.0.61</td>
<td>● Tomcat</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● WebLogic</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● WebSphere</td>
<td></td>
</tr>
<tr>
<td>IBM HTTP Server 6.1</td>
<td>● WebSphere</td>
<td></td>
</tr>
<tr>
<td>Microsoft IIS 6.0 (on Windows 2003 SP1)</td>
<td>● Oracle Application Server</td>
<td>If IIS is chosen as the Web server during configuration, you must allow all unknown ISAPI extensions via the Internet Information Services Manager.</td>
</tr>
<tr>
<td></td>
<td>● WebLogic</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● WebSphere</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Tomcat</td>
<td></td>
</tr>
</tbody>
</table>
# Data Sources

## Supported Data Source Databases

<table>
<thead>
<tr>
<th>EPM System data sources: one or more of the following: *</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Essbase</td>
</tr>
<tr>
<td>● Financial Management</td>
</tr>
<tr>
<td>● Planning</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Oracle†:</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Oracle 11g†</td>
</tr>
<tr>
<td>● Oracle 10g Release 2 (10.2.0.2)</td>
</tr>
<tr>
<td>● Oracle 10g (10.1.0.5)</td>
</tr>
<tr>
<td>● Oracle 9i (9.2.0.5)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>One of the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Microsoft Access 2007</td>
</tr>
<tr>
<td>● Microsoft Access 2003</td>
</tr>
<tr>
<td>● Microsoft Access XP (2002)</td>
</tr>
<tr>
<td>● Microsoft Access 2000</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IBM DB2 9.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Interactive Reporting—ODBC</td>
</tr>
<tr>
<td>● Production Reporting—ODBC, JDBC, DB2 Connect</td>
</tr>
<tr>
<td>● Web Analysis—JDBC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IBM DB2 8.2</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Interactive Reporting—ODBC</td>
</tr>
<tr>
<td>● Production Reporting—ODBC, JDBC, DB2 Connect</td>
</tr>
<tr>
<td>● Web Analysis—JDBC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>IBM DB2 v7x for z/OS</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Interactive Reporting—ODBC</td>
</tr>
<tr>
<td>● Production Reporting—ODBC, JDBC, DB2 Connect</td>
</tr>
</tbody>
</table>

## Reporting and Analysis Modules and Connectivity

<table>
<thead>
<tr>
<th>EPM System data sources: one or more of the following: *</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Interactive Reporting—C API / MDX</td>
</tr>
<tr>
<td>● Financial Reporting—ADM</td>
</tr>
<tr>
<td>● Web Analysis—ADM</td>
</tr>
<tr>
<td>● Production Reporting—DDO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Financial Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Financial Reporting—ADM</td>
</tr>
<tr>
<td>● Web Analysis—ADM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planning</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Financial Reporting—ADM</td>
</tr>
<tr>
<td>● Web Analysis—ADM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Oracle†:</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Interactive Reporting—OCI, ODBC</td>
</tr>
<tr>
<td>● Production Reporting—OCI, ODBC, JDBC</td>
</tr>
<tr>
<td>● Web Analysis—JDBC</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>One of the following:</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Microsoft Access 2007</td>
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<tr>
<td>● Microsoft Access 2003</td>
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<tr>
<td>● Microsoft Access XP (2002)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>● Interactive Reporting—ODBC</td>
</tr>
<tr>
<td>● Production Reporting—ODBC, JDBC, DB2 Connect</td>
</tr>
<tr>
<td>● Web Analysis—JDBC</td>
</tr>
</tbody>
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<tbody>
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<tr>
<td>● Web Analysis—JDBC</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>IBM DB2 v7x for z/OS</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Interactive Reporting—ODBC</td>
</tr>
<tr>
<td>● Production Reporting—ODBC, JDBC, DB2 Connect</td>
</tr>
</tbody>
</table>

## Notes

- The version of Financial Management ADM must match the version of Financial Management Server.
- Planning data sources only apply to Financial Reporting.
- Web Analysis supports Planning only for access to Essbase cubes.
- The version of Planning ADM must match the release of Planning Server.

- Supported only by Production Reporting—Windows only
- Supported only by: Interactive Reporting
- Supported only by: Production Reporting
<table>
<thead>
<tr>
<th>Supported Data Source Databases</th>
<th>Reporting and Analysis Modules and Connectivity</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBM DB2:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● IBM DB2 OLAP Server 8.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● IBM DB2 OLAP Server 8.1.7a</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Web Analysis</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Not supported by:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Oracle's Hyperion® Interactive Reporting Studio</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Oracle Hyperion Financial Reporting Studio, Fusion Edition</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Web Analysis</td>
</tr>
<tr>
<td>Informix 9.4 and later</td>
<td>Production Reporting—ODBC, JDBC, SDK 2.81</td>
<td>Supported only by Production Reporting</td>
</tr>
<tr>
<td>Informix 9.2 and later</td>
<td>Interactive Reporting—ODBC</td>
<td>Supported only by Interactive Reporting</td>
</tr>
<tr>
<td>Microsoft SQL Server:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Microsoft SQL Server 2005d</td>
<td>● Interactive Reporting—ODBC</td>
<td></td>
</tr>
<tr>
<td>● Microsoft SQL Server 2000 SP3a</td>
<td>● Production Reporting—ODBC, JDBC</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Web Analysis–JDBC</td>
<td></td>
</tr>
<tr>
<td>Microsoft SQL Server:</td>
<td>● Interactive Reporting—ODBO</td>
<td></td>
</tr>
<tr>
<td>● Microsoft SQL Server 2005 Analysis Services</td>
<td>● Financial Reporting–ADM</td>
<td></td>
</tr>
<tr>
<td>● Microsoft SQL Server 2000 SP3a Analysis Services</td>
<td>● Production Reporting–DDO</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Web Analysis–ADM</td>
<td></td>
</tr>
<tr>
<td>OpenEdge 10.1B</td>
<td>Production Reporting—ODBC</td>
<td>Supported only by Production Reporting</td>
</tr>
<tr>
<td>Progress 9.1E04</td>
<td>Production Reporting—ODBC</td>
<td>Supported only by Production Reporting</td>
</tr>
<tr>
<td>Red Brick 6.3 or higher</td>
<td>● Interactive Reporting—ODBC</td>
<td>Supported only by:</td>
</tr>
<tr>
<td></td>
<td>● Production Reporting—ODBC</td>
<td>● Interactive Reporting–Windows only</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Production Reporting–Windows only</td>
</tr>
<tr>
<td>SAP:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● SAP BW 3.1 or 3.5</td>
<td>● Financial Reporting–BAPI</td>
<td></td>
</tr>
<tr>
<td>● NetWeaver BI (SAP BW) 7.0</td>
<td>● Interactive Reporting–ODBO</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Production Reporting–BAPI</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● Web Analysis–BAPI</td>
<td></td>
</tr>
<tr>
<td>SAP R/3 Enterprise (mySAP ERP 2005 ) 4.6C / 6.x</td>
<td>Production Reporting–BAPI</td>
<td>Supported only by Production Reporting</td>
</tr>
<tr>
<td>Sybase 15</td>
<td>● Interactive Reporting—ODBC</td>
<td>Supported only by:</td>
</tr>
<tr>
<td></td>
<td>● Production Reporting—ODBC, JDBC, CTLIB</td>
<td>● Interactive Reporting</td>
</tr>
<tr>
<td></td>
<td></td>
<td>● Production Reporting</td>
</tr>
</tbody>
</table>
### Supported Data Source Databases

<table>
<thead>
<tr>
<th>Supported Data Source Databases</th>
<th>Reporting and Analysis Modules and Connectivity</th>
<th>Notes</th>
</tr>
</thead>
</table>
| Sybase ASE 12.5.1 and 12.5.2 and later | ● Interactive Reporting—ODBC  
● Production Reporting—ODBC, JDBC, CTLIB  
● Web Analysis—JDBC | Supported only by:  
● Interactive Reporting  
● Production Reporting |
| Sybase IQ 12.6 and later | ● Interactive Reporting—ODBC  
● Production Reporting—ODBC | Supported only by:  
● Interactive Reporting—Windows only  
● Production Reporting—Windows only |
| Teradata (ODBC):<sup>h</sup> | ● Interactive Reporting—ODBC  
● Production Reporting—ODBC, PP2(Solaris, PA-RISC HP-UX) | Not supported by Financial Reporting |
| Teradata (JDBC):<sup>i</sup> | ● Web Analysis—JDBC | Not supported by Financial Reporting |

<sup>1</sup>Data sources should be consistent with compatibility matrix. See Chapter 4, “Release Compatibility”

<sup>2</sup>For all supported versions of Oracle: 1) Includes support for Real Application Cluster (RAC) and ASM. Includes support for SE, SE1, and EE. The Oracle OLE provider and Oracle database server must be the same version.

<sup>3</sup>Oracle 11g will be supported when it is Generally Available.

<sup>4</sup>By default, SQL Server 2005 disables TCP/IP connections to the database. Ensure that the TCP/IP connections are enabled.

<sup>5</sup>Microsoft SQL Server Analysis Services, supported only by Windows-based Reporting and Analysis servers

<sup>6</sup>To connect to Microsoft SSAS 2005 databases, you must install SSAS Connectivity Client on any Financial Reporting client or server or any Web Analysis Web application machine.

<sup>7</sup>To connect to SSAS 2000 databases, you must install SSAS 2000 Connectivity Client on any Financial Reporting client or server or any Web Analysis Web application machine.

<sup>8</sup>Obtain the driver separately from the Teradata web site

<sup>9</sup>Obtain the driver separately from the Teradata web site

### Financial Performance Management Applications

This section lists the requirements for:

- Planning
- Financial Management
- Performance Scorecard
- Profitability and Cost Management
- Strategic Finance

Note:
Requirements for client software are listed in “Client Requirements” on page 17. Requirements for Performance Management Architect and Calculation Manager are listed in “Foundation Services” on page 22.

Server Operating System/Processor

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Processor</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 2003 SP1 (R2 is also supported)*</td>
<td>Dual x86-32, 2 GHz minimum 32-bit</td>
<td>For Financial Management, supported only for server and database server</td>
</tr>
<tr>
<td>Windows 2003 SP1, Server Enterprise x64 Edition (R2 is also supported)</td>
<td>x86-64 64-bit</td>
<td>Exceptions: Strategic Finance and Profitability and Cost Management binaries are 32-bit.</td>
</tr>
</tbody>
</table>

*For Financial Management, also install the following DCOM hot fix from Microsoft: [http://support.microsoft.com/kb/899148](http://support.microsoft.com/kb/899148)

Note:
Oracle VM 2.1 for Linux and Windows is supported as a virtualized environment. For information on support for Oracle’s EPM System products in third-party virtualized environments, see Metalink Note 562663.1.

Disk Space and RAM

Disk space and RAM requirements are approximate and do not include additional possible requirements on the machine. The installation program calculates the required disk space, based on your installation choices. Disk space estimates include documentation help files (if applicable) and EPM System common components.

<table>
<thead>
<tr>
<th>Component</th>
<th>Disk Space (Minimum)</th>
<th>RAM (Minimum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Management Server</td>
<td>32 GB (10 GB available)</td>
<td>4 GB</td>
</tr>
<tr>
<td>Database Server for Financial Management</td>
<td>12 GB</td>
<td>4 GB</td>
</tr>
<tr>
<td>Planning</td>
<td>32 GB (10 GB available)</td>
<td>4 GB</td>
</tr>
<tr>
<td>Performance Scorecard</td>
<td>2 GB recommended</td>
<td>1 GB*</td>
</tr>
<tr>
<td>Strategic Finance Server</td>
<td>250 MB†</td>
<td>2 GB</td>
</tr>
</tbody>
</table>
### Component | Disk Space (Minimum) | RAM (Minimum)
--- | --- | ---
Profitability and Cost Management | 50 GB (10 GB available) | 2 GB

*1 GB includes Performance Scorecard and Alerter servers.
†Sufficient storage should be included to contain the entities, their backup archives, administrative and transaction files, and user background task logs, such as consolidation reports.

**Note:**

When deploying all EPM System products to WebLogic application server on one machine, 6 GB of RAM is recommended.

## EPM System Software

<table>
<thead>
<tr>
<th>Required Component</th>
<th>Required For</th>
</tr>
</thead>
</table>
| Essbase (Essbase Server and Administration Services components) | ● Planning  
● Performance Scorecard Server—for custom reporting through cube production |
| Performance Management Architect | ● Profitability and Cost Management  
● Calculation Manager  
● Financial Management (optional, if you are using Classic Application Administration)  
● Planning (optional, if you are using Classic Application Administration) |
| Calculation Manager | Optional for use with:  
● Financial Management  
● Planning  
Required for use with:  
● Oracle Hyperion Capital Asset Planning, Fusion Edition  
● Oracle Hyperion Workforce Planning, Fusion Edition |
| Shared Services | ● Financial Management  
● Planning  
● Performance Scorecard  
● Strategic Finance  
● Profitability and Cost Management |
| EPM Workspace | ● Financial Management  
● Planning  
● Performance Scorecard  
● Profitability and Cost Management |
Repository Databases

A repository database is required for:

- Planning
- Financial Management
- Performance Scorecard
- Profitability and Cost Management

### Supported Relational Database Repositories

<table>
<thead>
<tr>
<th>Supported Database Repositories</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Database 9.2.0.5 – 11g (11.1.0.6.0)*</td>
<td>For Financial Management, the Oracle Database client must be installed on the same machine as the Financial Management application server.</td>
</tr>
<tr>
<td>IBM DB2 8.2 FP4 – 9.1x</td>
<td>Not supported for Profitability and Cost Management. If you use an IBM DB2 database for Financial Management, DB2 9 Runtime Client and DB2 .NET Data Provider 9.1.0.2 must be installed on the same machine as the Financial Management Application Server.</td>
</tr>
<tr>
<td>Microsoft SQL Server 2000 SP3a – 2005†</td>
<td></td>
</tr>
</tbody>
</table>

*For all supported versions of Oracle Database: Includes support for RAC - Real Application Cluster and ASM. Includes support for SE, SE1, EE. The Oracle OLE provider and Oracle Database server must be the same version.

†By default, SQL Server 2005 disables TCP/IP connections to the database. Ensure that the TCP/IP connections are enabled.

### Web Application Servers

If an application contains more than 500 users and 10,000 measures, consider deploying to a Web application server cluster for increased scalability. For information about application server clustering, see Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide.

A Web application server is required for:

- Planning
- Performance Scorecard
- Profitability and Cost Management

**Note:**

Only 32–bit application servers are supported.

### Supported Web Application Servers

<table>
<thead>
<tr>
<th>Supported Web Application Servers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Application Server 10g (10.1.3.3.x)†</td>
<td>Profitability and Cost Management supports only Oracle 10.1.3.x. For Performance Scorecard, auto-deployment is not supported. To deploy to Oracle Application Server, perform a manual deployment as</td>
</tr>
</tbody>
</table>
**Supported Web Application Servers**

<table>
<thead>
<tr>
<th>Supported Web Application Servers</th>
<th>Notes</th>
</tr>
</thead>
</table>
If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required. |
| IBM WebSphere 6.1.0.7 – 6.1.0.x‡ | |
| Apache Tomcat 5.5.17d |  
*Supports these editions: Java, Standard One, Standard & Enterprise.  
†WebLogic Express is supported for each supported version of WebLogic.  
‡WebSphere Express, ND, and XD Editions are supported for each supported version of WebSphere.  
dApache Tomcat is the embedded Java container that is installed automatically on all platforms. For deployments that require high availability or failover, Oracle recommends using a commercially supported Web application server that supports high availability and failover. |

**Web Servers/Plug-ins**

A Web server is required for:

- Financial Management
- Planning
- Profitability and Cost Management
- Performance Scorecard

<table>
<thead>
<tr>
<th>Supported Web Servers*</th>
<th>Supported Application Servers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle HTTP Server 10g (10.1.3.3.0 and higher)</td>
<td>● Oracle Application Server</td>
<td>Not supported for Financial Management</td>
</tr>
</tbody>
</table>
| Apache HTTP Server 2.0.61 | ● Tomcat  
● WebLogic  
● WebSphere | Not supported for Financial Management |
| IBM HTTP Server 6.1 | ● WebSphere | |
| Microsoft IIS 6.0 (on Windows 2003 SP1) | ● Oracle Application Server  
● WebLogic  
● WebSphere  
● Tomcat | If IIS is chosen as the Web server during configuration, you must allow all unknown ISAPI extensions via the Internet Information Services Manager. |

*Planning can also use an internal WebLogic or WebSphere Web server.

**Data Management**

This section lists the requirements for:
- Data Integration Management
- FDM
- Data Relationship Management

Requirements for client software are listed in “Client Requirements” on page 17.

## Server Operating System/Processor

<table>
<thead>
<tr>
<th>Operating System</th>
<th>Processor</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows 2003 SP1 (R2 is also supported)</td>
<td>x86-32</td>
<td>32-bit</td>
</tr>
<tr>
<td>Windows 2003 SP1, Server Enterprise x64 Edition (R2 is also supported)</td>
<td>x86-64</td>
<td>64-bit Supported only for Data Relationship Management, 32-bit binaries only</td>
</tr>
</tbody>
</table>

**Note:**

Oracle VM 2.1 for Linux and Windows is supported as a virtualized environment. For information on support for Oracle’s EPM System products in third-party virtualized environments, see Metalink Note 562663.1.

## Disk Space/RAM

Disk space and RAM requirements are approximate and do not include additional possible requirements on the machine. The installation program calculates the required disk space, based on your installation choices. Disk space estimates include documentation help files (if applicable) and EPM System common components.

<table>
<thead>
<tr>
<th>Component</th>
<th>Disk Space (Minimum)</th>
<th>RAM (Minimum)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Integration Management</td>
<td>Refer to the Informatica PowerCenter 8.1.1 installation documentation.</td>
<td>Refer to the Informatica PowerCenter 8.1.1 installation documentation.</td>
</tr>
<tr>
<td>FDM Database Server</td>
<td>- Dependent on size of the FDM application</td>
<td>1 GB per 75 concurrent users (2 GB minimum)</td>
</tr>
<tr>
<td>FDM folder structure</td>
<td>- Multiple HDDs to spread processing</td>
<td></td>
</tr>
<tr>
<td>FDM Application Server</td>
<td>200 MB</td>
<td>2 GB (per 75 concurrent users)</td>
</tr>
<tr>
<td>FDM Web Server</td>
<td>200 MB</td>
<td>2 GB</td>
</tr>
<tr>
<td>Data Relationship Management-Database Server</td>
<td>2 GB</td>
<td>2 GB</td>
</tr>
</tbody>
</table>
## EPM System Software

**Required Component** | **Required For**
--- | ---
Shared Services | ● Data Relationship Management Application Server—For external authentication only  
● FDM—For external authentication only
● Essbase  
● Financial Management  
● Oracle’s Hyperion® Enterprise®  
● Planning

Depending on the EPM System products that are deployed

## Third-Party Software

**Required Software** | **Required For**
--- | ---
Informatica PowerCenter 8.1.1 SP3 | Data Integration Management

● Microsoft MDAC 2.8 or later
● Excel 2000 or later | FDM Application Server. On Windows 2003, MDAC is installed with FDM.

● Microsoft IIS 6.0 (on Windows Server 2003)
● Microsoft MDAC 2.8 or later | FDM Web Server. On Windows 2003, MDAC is installed with FDM.

● Optional—Additional client software, such as Oracle SQL*Plus for Oracle Database and Query Analyzer for SQL Server, can be used for verifying connectivity and for troubleshooting. ODBC can also be used for troubleshooting.  
● A set of client drivers:
  ○ Oracle Database client drivers (DLLs)  
  ○ Microsoft SQL Server client drivers (DLLs)  
● Microsoft .NET Framework | Data Relationship Management - Application Server

## Repository Databases

A database repository is required for:  
● FDM  
● Data Relationship Management  
● Data Integration Management (not configurable with EPM System Configurator)
### Supported Relational Database Repositories

<table>
<thead>
<tr>
<th>Supported Relational Database Repositories</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Database 9.2.0.5 – 11g (11.1.0.6.0)†</td>
<td></td>
</tr>
<tr>
<td>IBM DB2 8.2 FP4 – 9.1x</td>
<td>Not supported for Data Relationship Management or FDM</td>
</tr>
<tr>
<td>Microsoft SQL Server 2000 SP3a – 2005‡</td>
<td></td>
</tr>
</tbody>
</table>

*Refer to the Informatica PowerCenter installation documentation for information about supported database repositories.

†For all supported versions of Oracle Database: Includes support for RAC - Real Application Cluster and ASM. Includes support for SE, SE1, EE. The Oracle OLE provider and Oracle Database server must be the same version.

‡By default, SQL Server 2005 disables TCP/IP connections to the database. Ensure that the TCP/IP connections are enabled.
Release Compatibility

How to Read the Tables in This Chapter

To ensure that you obtain the correct information from the tables in this chapter, read down each column to identify the versions of EPM System products that are compatible with the product named in the column heading.

<table>
<thead>
<tr>
<th>Planning 11.1</th>
<th>Financial Management 11.1</th>
<th>Performance Scorecard 11.1</th>
<th>Strategic Finance 11.1</th>
<th>Profitability Management 11.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.1</td>
<td>11.1</td>
<td>11.1</td>
<td>11.1</td>
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</tr>
<tr>
<td>9.3.x</td>
<td>9.3.x</td>
<td>9.3.x</td>
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<tr>
<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x</td>
</tr>
</tbody>
</table>

For example, Planning 11.1 is compatible with Essbase versions 11.1, 9.3.x, and 9.2.x.

Note:
The two tables for Smart View release compatibility in “Foundation Services Compatibility Tables” on page 52 are not formatted like the other tables in this chapter.

Foundation Services Release Compatibility

If you upgrade any EPM System product to Release 11.1.1, you must also upgrade the following Foundation Services components to Release 11.1:
• Shared Services
• EPM Workspace
• Performance Management Architect

In addition, if you use any Reporting and Analysis components, you must upgrade them to 11.1.1:
• Financial Reporting
• Interactive Reporting
• Production Reporting
• Web Analysis

**Backward-Compatibility with Other EPM System Products**

Foundation Services and Reporting and Analysis 11.1.1 components are backward-compatible with previous versions of the following products:
• Essbase
• Planning; Workforce Planning; Capital Asset Planning
• Financial Management
• Performance Scorecard
• Data Integration Management
• Data Relationship Management

To identify the versions of these products that are supported with 11.1.1 Foundation Services components, see “Shared Services, EPM Workspace, Performance Management Architect, and Smart Space Compatibility” on page 53.

To use EPM System products in a mixed-mode environment (i.e., not all products have been upgraded to 11.1.1), you must edit Oracle’s Hyperion Shared Services Registry to ensure that the products operate properly. For more information about editing Shared Services Registry content for mixed-mode use, and for information about other issues with using EPM System in a mixed-mode environment, see “Using Mixed Releases” in *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide*.

**Foundation Services Compatibility Tables**

Use the following tables to determine compatibility between Foundation Services components and other product components:
• “Shared Services, EPM Workspace, Performance Management Architect, and Smart Space Compatibility” on page 53
• “Smart View Compatibility with Provider Services” on page 54
• “Smart View Compatibility with Independent Providers” on page 55
### Table 3  Shared Services, EPM Workspace, Performance Management Architect, and Smart Space Release Compatibility

<table>
<thead>
<tr>
<th></th>
<th>Shared Services 11.1.1</th>
<th>EPM Workspace 11.1.1*</th>
<th>Performance Management Architect 11.1.1 (includes Calculation Manager)</th>
<th>Smart Space 11.1.1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Essbase</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Essbase versions</td>
<td>11.1.1</td>
<td>NA</td>
<td>11.1.1 9.3.1</td>
<td>11.1.1 9.3.1</td>
</tr>
<tr>
<td></td>
<td>9.3.x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>9.2.x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Administration Services versions</td>
<td>11.1.1 9.3.x</td>
<td>NA</td>
<td>11.1.1 9.3.1</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>9.2.x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Provider Services versions</td>
<td>11.1.1 9.3.x</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>9.2.x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Integration Services versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Essbase Studio versions</td>
<td>11.1.1 9.3.x</td>
<td>NA</td>
<td>11.1.1 9.3.1</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>9.2.x</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Reporting and Analysis</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Financial Reporting versions</td>
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<td>NA</td>
<td>11.1.1 9.3.1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Production Reporting versions</td>
<td>11.1.1 9.3.x</td>
<td>NA</td>
<td>11.1.1 9.3.1</td>
<td></td>
</tr>
<tr>
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<td></td>
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<td></td>
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</tr>
<tr>
<td>Compatible Interactive Reporting versions</td>
<td>11.1.1 9.3.x</td>
<td>NA</td>
<td>11.1.1 9.3.1</td>
<td></td>
</tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Web Analysis versions</td>
<td>11.1.1 9.3.x</td>
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<td>11.1.1 9.3.1</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Financial Performance Management Applications</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Planning versions</td>
<td>11.1.1 9.3.x</td>
<td>11.1.1 9.3.1</td>
<td>11.1.1 9.3.1†</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td>9.2.x</td>
<td>9.2.x</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

* NA: Not Available
† 9.3.1 is the minimum required version for this feature.
### Smart View Compatibility with Provider Services

#### Table 4  Smart View Compatibility with Provider Services and EPM System Products

<table>
<thead>
<tr>
<th>Provider Services Version</th>
<th>Smart View Client Version</th>
<th>Supported Product Versions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Provider Services 11.1.1</td>
<td>11.1.1*</td>
<td>Planning 11.1.1</td>
</tr>
</tbody>
</table>

*EPM Workspace 11.1.1 is also compatible with Oracle BI EE and Oracle BI Publisher versions 10.1.3.3.1 and 10.1.3.3.2.

†Calculation Manager 11.1.1 is not compatible with Planning 9.3.1, including Workforce Planning and Oracle Hyperion Capital Asset Planning, Fusion Edition.
Smart View 11.1.1 is also compatible with Oracle Business Intelligence Enterprise Edition versions 10.1.3.3.1 and 10.1.3.3.2.

**Note:**

Smart Slice operations and Planning ad hoc operations are supported only when Provider Services Release 11.1.1 is used.

### Smart View Compatibility with Independent Providers

**Table 5  Smart View Compatibility with Independent Providers**

<table>
<thead>
<tr>
<th>Smart View Client Version</th>
<th>Supported Versions of Independent Providers</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>11.1.1</td>
<td>Financial Management:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 11.1.1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 9.3. x</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 9.2. x</td>
<td></td>
</tr>
<tr>
<td>11.1.1</td>
<td>Planning:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 11.1.1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 9.3. x</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 9.2. x</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Smart Slice operations and Planning ad hoc operations are supported only when Provider Services Release 11.1.1 is used. See Table 4.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Smart View 11.1.1 does not support Offline Planning Provider 9.2. Smart View support for Offline Planning is only for Planning 9.3.0.1 and higher.</td>
<td></td>
</tr>
<tr>
<td>11.1.1</td>
<td>Reporting and Analysis:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 11.1.1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 9.3. x</td>
<td></td>
</tr>
<tr>
<td></td>
<td>● 9.2. x</td>
<td></td>
</tr>
</tbody>
</table>

**Note:**

Smart View 11.1.1 is also compatible with Oracle Crystal Ball, Fusion Edition and with Hyperion Enterprise 6.5.0.1.

### Essbase Release Compatibility

**Note:**

For Smart View compatibility, see “Smart View Compatibility with Provider Services” on page 54.
<table>
<thead>
<tr>
<th>Table 6  Essbase Release Compatibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Foundation Services</strong></td>
</tr>
<tr>
<td>Compatible Shared Services versions</td>
</tr>
<tr>
<td>Compatible EPM Workspace versions</td>
</tr>
<tr>
<td>Compatible Performance Management Architect versions*</td>
</tr>
<tr>
<td>Compatible Smart Space versions</td>
</tr>
<tr>
<td><strong>Essbase</strong></td>
</tr>
<tr>
<td>Compatible Essbase versions</td>
</tr>
<tr>
<td>Compatible Administration Services versions</td>
</tr>
<tr>
<td>Compatible Provider Services versions</td>
</tr>
<tr>
<td>Compatible Integration Services versions</td>
</tr>
<tr>
<td>Compatible Essbase Studio versions</td>
</tr>
<tr>
<td><strong>Reporting and Analysis</strong></td>
</tr>
<tr>
<td>Compatible Financial Reporting versions</td>
</tr>
<tr>
<td>Compatible Production Reporting versions</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>-------------------------------------------</td>
</tr>
<tr>
<td>Compatible Interactive Reporting versions</td>
</tr>
<tr>
<td>Compatible Web Analysis versions</td>
</tr>
</tbody>
</table>

**Financial Performance Management Applications**

| Compatible Planning versions              | 11.1.1         | 11.1.1                          | NA                          | NA                       | NA                    |
|                                          | 9.3.x          | 9.3.x                           | NA                          | NA                       | NA                    |
|                                          | 9.2.x          | 9.2.x                           | NA                          | NA                       | NA                    |
| Compatible Financial Management versions  | 11.1.1         | NA                             | NA                          | NA                       | NA                    |
|                                          | 9.3.x          | 9.3.x                           | NA                          | NA                       | NA                    |
|                                          | 9.2.x          | 9.2.x                           | NA                          | NA                       | NA                    |
| Compatible Performance Scorecard versions| 11.1.1         | NA                             | NA                          | NA                       | NA                    |
|                                          | 9.3.x          | 9.3.x                           | NA                          | NA                       | NA                    |
|                                          | 9.2.x          | 9.2.x                           | NA                          | NA                       | NA                    |
| Compatible Strategic Finance versions     | 11.1.1         | NA                             | NA                          | NA                       | NA                    |
|                                          | 9.3.x          | 9.3.x                           | NA                          | NA                       | NA                    |
|                                          | 9.2.x          | 9.2.x                           | NA                          | NA                       | NA                    |
| Compatible Profitability and Cost Management versions | 11.1.1 | 11.1.1                          | 11.1.1                      | 11.1.1                   | NA                    |

**Data Management**

| Compatible Data Relationship Management versions | All versions through flat files or interface tables | NA | All versions through flat files or interface tables | NA | NA |
|                                               |                                                  |    |                                                        |    |    |
| Compatible FDM versions                       | 11.1.1                                         | NA | NA                                                      | NA | 11.1.1 |
|                                               | 9.3.x                                          |    |                                                        |    |    |
|                                               | 9.2.x                                          |    |                                                        |    |    |
| Compatible Data Integration Management versions | 9.3.x                                         | NA | NA                                                      | NA | NA |
|                                               | 9.2.x                                          |    |                                                        |    |    |

*Includes Calculation Manager
### Reporting and Analysis Release Compatibility

For EPM Workspace compatibility information, see “Foundation Services Release Compatibility” on page 51.

#### Table 7  Reporting and Analysis Release Compatibility

<table>
<thead>
<tr>
<th></th>
<th>Interactive Reporting 11.1.1</th>
<th>Financial Reporting 11.1.1</th>
<th>Production Reporting 11.1.1</th>
<th>Web Analysis 11.1.1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Foundation Services</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Shared Services versions†</td>
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<td>11.1.1</td>
<td>11.1.1</td>
<td>11.1.1</td>
</tr>
<tr>
<td>Compatible EPM Workspace versions</td>
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<td>11.1.1</td>
<td>11.1.1</td>
<td>11.1.1</td>
</tr>
<tr>
<td>Compatible Performance Management Architect versions‡</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Smart Space versions</td>
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<td>11.1.1</td>
<td>11.1.1</td>
<td>11.1.1</td>
</tr>
<tr>
<td><strong>Essbase</strong></td>
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<td></td>
<td></td>
</tr>
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<td>Compatible Essbase versions</td>
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<td>11.1.1</td>
<td>11.1.1</td>
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<td>9.2.x</td>
<td>9.2.x</td>
</tr>
<tr>
<td>Compatible Administration Services versions</td>
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<td>NA</td>
<td>NA</td>
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<tr>
<td>Compatible Provider Services versions</td>
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<td>9.3.x</td>
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<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x</td>
</tr>
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<td>Compatible Integration Services versions</td>
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<td>11.1.1</td>
<td>11.1.1</td>
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<td>9.2.x</td>
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<td>9.2.x</td>
<td>9.2.x</td>
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<td>11.1.1</td>
<td>11.1.1</td>
</tr>
<tr>
<td><strong>Financial Performance Management Applications</strong></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Planning versions</td>
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<td>11.1.1</td>
<td>NA</td>
<td>11.1.1</td>
</tr>
<tr>
<td></td>
<td>9.3.x</td>
<td>9.3.x</td>
<td>9.3.x</td>
<td>9.3.x</td>
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<tr>
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<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x</td>
</tr>
<tr>
<td>Component</td>
<td>Interactive Reporting 11.1.1</td>
<td>Financial Reporting 11.1.1</td>
<td>Production Reporting 11.1.1</td>
<td>Web Analysis 11.1.1</td>
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<tr>
<td>-----------------------------------------------</td>
<td>-----------------------------</td>
<td>---------------------------</td>
<td>-----------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Compatible Financial Management versions</td>
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<td>11.1.1 9.3.x 9.2.x</td>
<td>NA</td>
<td>11.1.1 9.3.x 9.2.x</td>
</tr>
<tr>
<td>Compatible Performance Scorecard versions</td>
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<td>NA</td>
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<tr>
<td>Compatible Strategic Finance versions</td>
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<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Profitability and Cost Management versions</td>
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</table>

**Data Management**

<table>
<thead>
<tr>
<th>Component</th>
<th>Interactive Reporting 11.1.1</th>
<th>Interactive Reporting 9.3.x</th>
<th>Interactive Reporting 9.2.x</th>
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</thead>
<tbody>
<tr>
<td>Compatible Data Relationship Management versions</td>
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<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible FDM versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Data Integration Management versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

*Release compatibility among Interactive Reporting components is listed in Table 8.
†Shared Services is not needed for standalone products.
‡Includes Calculation Manager.

Table 8 Interactive Reporting Components Release Compatibility

<table>
<thead>
<tr>
<th>Component</th>
<th>Interactive Reporting 11.1.1</th>
<th>Interactive Reporting 9.3.x</th>
<th>Interactive Reporting 9.2.x</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle’s Hyperion® Impact Management Services — Impact of Change</td>
<td>11.1.1</td>
<td>9.3.x</td>
<td>9.2.x</td>
</tr>
<tr>
<td>Impact Management Services — Data Model Update</td>
<td>11.1.1</td>
<td>9.3.x</td>
<td>9.2.x</td>
</tr>
<tr>
<td>Oracle’s Hyperion® Impact Management Services — JavaScript Update Kits</td>
<td>11.1.1</td>
<td>11.1.1 9.3.x</td>
<td>NA</td>
</tr>
<tr>
<td>Dashboard Development Services — Dashboard Studio</td>
<td>11.1.1 9.3.x</td>
<td>11.1.1 9.3.x</td>
<td>11.1.1 9.3.x</td>
</tr>
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<td></td>
<td>Interactive Reporting 11.1.1</td>
<td>Interactive Reporting 9.3.x</td>
<td>Interactive Reporting 9.2.x</td>
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</tr>
<tr>
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<td>11.1.1</td>
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<td>Dashboard Development</td>
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<td>9.3.x</td>
<td>9.3.x</td>
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<td>Services — Dashboards,</td>
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<td></td>
</tr>
<tr>
<td>Templates, and</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Components</td>
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</tr>
</tbody>
</table>

### Financial Performance Management Applications Release Compatibility

#### Table 9  Financial Performance Management Applications Release Compatibility

<table>
<thead>
<tr>
<th></th>
<th>Planning 11.1.1†</th>
<th>Financial Management 11.1.1</th>
<th>Performance Scorecard 11.1.1</th>
<th>Strategic Finance 11.1.1</th>
<th>Profitability and Cost Management 11.1.1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Foundation Services</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Shared</td>
<td>11.1.1</td>
<td>11.1.1</td>
<td>11.1.1</td>
<td>11.1.1</td>
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<tr>
<td>Services versions</td>
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<td></td>
</tr>
<tr>
<td>Compatible EPM</td>
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<td>11.1.1</td>
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<td>Workspace versions</td>
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</tr>
<tr>
<td>Compatible Performance</td>
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<td>NA</td>
<td>NA</td>
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</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>versions†</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Smart</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
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<td>NA</td>
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<tr>
<td>Space versions</td>
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<td></td>
</tr>
<tr>
<td><strong>Essbase</strong></td>
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<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Essbase</td>
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<td>11.1.1</td>
<td>11.1.1</td>
<td>11.1.1</td>
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<tr>
<td>versions</td>
<td>9.3.x</td>
<td>9.3.x</td>
<td>9.3.x</td>
<td>9.3.x</td>
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<tr>
<td></td>
<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x (7.1.2 API)</td>
<td></td>
</tr>
<tr>
<td>Compatible Administration</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Services versions</td>
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<td>NA</td>
<td>NA</td>
<td>11.1.1</td>
</tr>
<tr>
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<td>9.2.x</td>
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</tr>
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<td></td>
<td>9.2.x</td>
<td>9.2.x</td>
<td>9.2.x</td>
<td>NA</td>
<td></td>
</tr>
<tr>
<td>Compatible Provider</td>
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<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>11.1.1</td>
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<tr>
<td>Services versions</td>
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<td></td>
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<tr>
<td>Planning <strong>11.1.1</strong></td>
<td>Financial Management <strong>11.1.1</strong></td>
<td>Performance Scorecard <strong>11.1.1</strong></td>
<td>Strategic Finance <strong>11.1.1</strong></td>
<td>Profitability and Cost Management <strong>11.1.1</strong></td>
<td></td>
</tr>
<tr>
<td>----------------------</td>
<td>-------------------------------</td>
<td>---------------------------------</td>
<td>-------------------------------</td>
<td>-----------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Compatible Integration Services versions</td>
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<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>11.1.1</td>
</tr>
<tr>
<td>Compatible Essbase Studio versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

**Reporting and Analysis**

| Compatible Financial Reporting versions | 11.1.1 | 11.1.1 | 9.3.x | 9.2.x | NA | NA | NA |
| Compatible Oracle's Hyperion® SQR® Production Reporting versions | NA | NA | NA | NA | NA | NA |
| Compatible Interactive Reporting versions | NA | NA | Through IR Smartcuts | NA | NA |
| Compatible Oracle's Hyperion® Web Analysis versions | 11.1.1 | 11.1.1 | 9.3.x | 9.2.x | Through Extended Analytics | NA | 11.1.1 |

**Financial Performance Management Applications**

| Compatible Planning versions | NA | 11.1.1 | 9.3.x | 9.2.x | NA | The version deployed with Essbase | NA |
| Compatible Financial Management versions | 11.1.1 | 9.3.x | 9.2.x | NA | 11.1.1 | 9.3.x | 9.2.x | NA |
| Compatible Performance Scorecard versions | NA | 11.1.1 | 9.3.x | 9.2.x | NA | NA | NA |
| Compatible Strategic Finance versions | The version deployed with Essbase | 11.1.1 | 9.3.x | 9.2.x | NA | NA | NA |
| Compatible Profitability and Cost Management versions | NA | NA | NA | NA | NA | NA | NA |
### Data Management

#### Table 10  Data Management Release Compatibility

<table>
<thead>
<tr>
<th></th>
<th>Data Relationship Management 11.1.1</th>
<th>FDM 11.1.1</th>
<th>Oracle's Hyperion® Data Integration Management 11.1.1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Foundation Services</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Shared Services versions</td>
<td>11.1.1*</td>
<td>11.1.1</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible EPM Workspace versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Oracle Hyperion Smart View for Office, Fusion Edition versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Performance Management Architect versions†</td>
<td>All versions via flat files or interface tables</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Smart Space versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

**Essbase**

---

*Includes Oracle Hyperion Workforce Planning, Fusion Edition and Capital Expense Planning
†Includes Calculation Manager
<table>
<thead>
<tr>
<th></th>
<th>Data Relationship Management 11.1.1</th>
<th>FDM 11.1.1</th>
<th>Oracle's Hyperion® Data Integration Management 11.1.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compatible Essbase versions</td>
<td>All versions through flat files</td>
<td>11.1.1</td>
<td>11.1.1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9.3.x</td>
<td>9.3.x</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9.2.x (7.1.2 API)</td>
<td>9.2.x</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7.1.6</td>
<td>7.1.6</td>
</tr>
<tr>
<td>Compatible Administration Services versions</td>
<td>All versions through flat files or interface tables</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Oracle Hyperion Provider Services versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Integration Services versions</td>
<td>All versions through flat files or interface tables</td>
<td>NA</td>
<td>NA</td>
</tr>
<tr>
<td>Compatible Essbase Studio versions</td>
<td>NA</td>
<td>11.1.1</td>
<td>NA</td>
</tr>
</tbody>
</table>

**Financial Performance Management Applications**

<table>
<thead>
<tr>
<th></th>
<th>All versions through flat files</th>
<th>The version deployed with Essbase</th>
<th>11.1.1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compatible Planning versions</td>
<td></td>
<td>11.1.1</td>
<td>9.3.x</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>9.2.0.3</td>
</tr>
<tr>
<td>Compatible Financial Management versions</td>
<td>All versions through flat files</td>
<td>11.1.1</td>
<td>11.1.1</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9.3.x</td>
<td>9.3.x</td>
</tr>
<tr>
<td></td>
<td></td>
<td>9.2.x</td>
<td>9.2.0.3</td>
</tr>
<tr>
<td>Compatible Performance Scorecard versions</td>
<td>NA</td>
<td>NA</td>
<td>11.1.1</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>9.3.x</td>
</tr>
<tr>
<td>Compatible Strategic Finance versions</td>
<td>NA</td>
<td>11.1.1</td>
<td>NA</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Compatible Profitability and Cost Management versions</td>
<td>NA</td>
<td>NA</td>
<td>NA</td>
</tr>
</tbody>
</table>

*If Data Relationship Management is used only with Shared Services, and not with any other EPM System products, it is also backward-compatible with the 9.2.x and 9.3.x versions of Shared Services.
†Includes Calculation Manager
Planning Your Installation

Use the following checklist to prepare for installing EPM System products. Oracle recommends that you review the checklist with your consultant at least one week before installation. Completing the checklist in advance of installation helps ensure a smoother, faster installation.

Table 11  Pre-installation Planning Checklist

<table>
<thead>
<tr>
<th>Task</th>
<th>Comments</th>
<th>Check When Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preparing the work area</td>
<td>Prepare a work area for consultants who are assisting with the installation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Internet access—a direct connection outside the firewall</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Work area and computer (ideally located where the servers on which you are installing EPM System products are located), with network access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Telephone</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ensure that you can access the Oracle® E-Delivery (<a href="http://edelivery.oracle.com/">http://edelivery.oracle.com/</a>) site.</td>
<td></td>
</tr>
<tr>
<td>Obtaining third-party licenses</td>
<td>Obtain required third-party license keys.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Some third-party products require license keys or license files. Requesting and receiving a license key can require several days.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>For Web application servers, consider which type of license works best for your organization. For example, you might not</td>
<td></td>
</tr>
<tr>
<td>Task</td>
<td>Comments</td>
<td>Check When Completed</td>
</tr>
<tr>
<td>------</td>
<td>----------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Preparing the software</td>
<td>need a license for the highest level of functionality; a license for a lower level of functionality might meet your needs.</td>
<td></td>
</tr>
<tr>
<td>Download the EPM System Installer and the required product installation assemblies from the media packs for the products that you purchased.</td>
<td>Download from the Oracle® E-Delivery (<a href="http://edelivery.oracle.com/">http://edelivery.oracle.com/</a>) site. Review the Media Pack Readme on Oracle® E-Delivery to identify the products that are required and optional for use with your products. See the Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide for information about how to unzip and organize the files.</td>
<td></td>
</tr>
<tr>
<td>Ensure that the products meet EPM System product release compatibility requirements.</td>
<td>See Chapter 4, “Release Compatibility.”</td>
<td></td>
</tr>
<tr>
<td>Install all third-party components that are required by EPM System products.</td>
<td>See Chapter 3, “System Requirements.” Ensure that you have obtained all licenses that are required by third-party software.</td>
<td></td>
</tr>
<tr>
<td>Validate that all third-party product versions meet system requirements.</td>
<td>See Chapter 3, “System Requirements.”</td>
<td></td>
</tr>
</tbody>
</table>
| Gathering required documentation | In addition to this guide, download the following files from the Oracle® E-Delivery (http://edelivery.oracle.com/) site or from the Oracle Documentation Library (http://www.oracle.com/technology/documentation/epm.html) on Oracle® Technology Network:  
  - Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide  
  - Oracle Hyperion Enterprise Performance Management System Security Administration Guide  
  - Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide, if you are using SSL  
  - Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide |  |
<table>
<thead>
<tr>
<th>Task</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Other installation and deployment documentation required for your deployment. (See Chapter 1, &quot;Installation Documentation Roadmap.&quot;)</td>
<td></td>
</tr>
<tr>
<td>● The documentation for the products that you are installing</td>
<td></td>
</tr>
</tbody>
</table>

**Preparing the hardware**

<table>
<thead>
<tr>
<th>Task</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan your deployment architecture.</td>
<td>For example, before you configure EPM System products, you need to know whether you will deploy in a clustered environment. See Chapter 2, “EPM System Product Deployment” for information about EPM System product architecture. See Oracle Hyperion Enterprise Performance Management System High Availability Guide if you plan to deploy in a clustered environment.</td>
</tr>
<tr>
<td>Ensure that the necessary hardware is available for your deployment architecture, and verify that the computers meet system requirements.</td>
<td>For assistance in planning your deployment architecture, see Chapter 2, “EPM System Product Deployment.” For system requirements, see Chapter 3, “System Requirements.”</td>
</tr>
<tr>
<td>Prepare each server for the EPM System installation.</td>
<td>● Update server software as needed. For example, ensure that required service packs, hotfixes, and so on are installed.</td>
</tr>
<tr>
<td>● Disable unnecessary services.</td>
<td></td>
</tr>
<tr>
<td>If you are clustering for load-balancing or failover, ensure that IT prepares the load balancer (hardware, software) or the failover mechanism.</td>
<td>Ensure that the load balancer or failover mechanism is tested and ready before you start the installation. See the Oracle Hyperion Enterprise Performance Management System High Availability Guide for additional information.</td>
</tr>
<tr>
<td>Check network bandwidth and latency for distant sites and ensure that minimum requirements are met.</td>
<td></td>
</tr>
<tr>
<td>Synchronize server time.</td>
<td>When servers are not time synchronized, authentication errors that result in user access problems can occur between the EPM System application servers.</td>
</tr>
<tr>
<td>Arrange backup functionality.</td>
<td>After the installation, Oracle advises that you perform a full backup of all servers and databases. After the initial backup, include servers and databases in daily backup procedures.</td>
</tr>
<tr>
<td>Task</td>
<td>Comments</td>
</tr>
<tr>
<td>------</td>
<td>----------</td>
</tr>
<tr>
<td>Resolve potential firewall problems.</td>
<td>For example, in some cases, Essbase Integration Services Console is used on a client computer that is outside the network firewall, and the console requires access to Integration Server and Essbase Server, which are located inside the network firewall. In these cases, you must log on to Essbase Server with a name that both the client system and Integration Server can use to communicate with Essbase Server. Problems arise when you attempt to log on using the external IP address of the computer running Essbase Server. Integration Server cannot use the external IP address to communicate with the computer running Essbase Server because both Essbase Server and Integration Server are inside the firewall. Administrators can solve this problem by defining an alias for the Essbase Server computer that is usable from both sides of the firewall.</td>
</tr>
</tbody>
</table>
| Preparing databases | - Set up database client access from the servers to the database setup.  
- Set up user accounts to access the database.  
- If you are using an Oracle database, test the database client with the TNSPing command.  
If the database is installed, perform a full backup.  
For additional information about preparing databases, see “Preparing a Database” on page 71. | |
| Preparing the security infrastructure | Collect the information needed to configure external security user directories in Oracle's Hyperion® Shared Services Console. | See “Configuring User Directories” in the Oracle Hyperion Enterprise Performance Management System Security Administration Guide.  
**Upgrade Note!**  
If you are upgrading and want to support the movement of users and groups across Organizational Units (OUs), you must configure user directories in Shared Services to use a unique identity attribute to identify users and groups. See “Configuring User Directories” in the Oracle Hyperion Enterprise Performance Administration Guide. |
<table>
<thead>
<tr>
<th>Task</th>
<th>Comments</th>
<th>Check When Completed</th>
</tr>
</thead>
</table>
| For each server, prepare a user account with Administrator rights. Install as an administrator and as the same user for all EPM System products. | Windows:  
- For Windows systems, create a user ID with Local Administrative rights to the machine. Oracle recommends that you do not use the local system account to install.  
- Assign local policies as needed. For Windows, the user ID typically requires “Act as part of the OS, Bypass Traverse Checking, and Log-on as a batch job.” | Management System Security Administration Guide.                                                                                      |
| Create domain accounts.                                              | ● DCOM account, if required for your product (for example, hypdcom) — domain user or system account with local Administrator rights  
- Hyperion administrator (for example, hypadmin) — domain user account | Check When Completed |
| Obtain an account for external authentication with access to the user directory. | ● Create a login (which can be a service account) with Browse privileges for the user directory.  
- Ensure that the service account name does not include special characters.  
- Ensure that the service account’s Distinguished Name (DN) can access the user directory.  
- Note the user directory port.  
- Be familiar with the name of a Primary Domain Controller that can access MSAD (if applicable).  
- Ensure that the server can communicate with the user directory.  
See the Oracle Hyperion Enterprise Performance Management System Security Administration Guide. | Check When Completed |
| If you are using secure communication, ensure availability of SSL certificates for all components. | See the Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide.  
Oracle recommends a secure sockets-capable server in a production environment, or where the local network is not protected by some other means (such as a firewall) or where public users are able to access the Web server. | Check When Completed |
<p>| Open firewall ports and if needed, fix dynamic ports.                | See Chapter 6, “Ports.”                                                                                                                  | Check When Completed |</p>
<table>
<thead>
<tr>
<th>Task</th>
<th>Comments</th>
<th>Check When Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>If you are using Shared Services Native Directory (OpenLDAP), consider whether to provision by user or by group. If you provision by group, decide whether to use Native Directory groups or external authentication provider groups.</td>
<td>See the Oracle Hyperion Enterprise Performance Management System Security Administration Guide.</td>
<td></td>
</tr>
<tr>
<td><strong>Setting up Web application servers and Web servers</strong></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Ensure that Web application servers are available for EPM System product deployment. The application server and the product that you are deploying must be installed on the same computer. | ● To identify the products that require an application server and to view the list of supported application servers, see Chapter 3, “System Requirements.”  
  ● A default product installation provides an Embedded Java Container.  
  ● Ensure that you have obtained all required third-party licenses.  
  ● For special considerations for each Web application server, see “Preparing Web Application Servers” on page 80. |                      |
| Install a Web server to use with the EPM System products that require a Web server. | To identify the products that require a Web server and to view the list of supported Web servers, see Chapter 3, “System Requirements.” For additional information about setting up a Web server, see “Preparing Web Servers” on page 82.  
A default installation provides a Web server for the Embedded Java Container. |                      |
| If you are using software load balancing, in the Web server, prepare the load balancer plug-in to the Web application server. |                                                                          |                      |
| **Resolving ports**                                                  |                                                                          |                      |
| Identify and resolve port conflicts.                                | Review the list of EPM System product default ports in Chapter 6, “Ports.” |                      |
| **Preparing for product configuration**                              |                                                                          |                      |
| Collect the information needed to configure products after installation. | See “Configuring EPM System Products” in the Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide |                      |
| Review your license agreement to confirm which products you have purchased and are licensed to use. | During configuration, based on your license agreement, activate or deactivate features. See “License Compliance” in the Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide. |                      |
Preparing a Database

Before you install and configure most EPM System products, you must create a database using a supported RDBMS (Oracle Database, Microsoft SQL Server, or IBM DB2).

For ease of deployment and simplicity, you can use one database repository for all products (with the exceptions noted below). When you configure multiple products at one time using EPM System Configurator, one database is configured for all selected products.

Caution!

To use a different database for each product, perform the “Configure Database” task separately for each product. In some cases you might want to configure separate databases for products. Consider performance, roll-back procedures for a single application or product, and disaster recovery plans.

The following products and product components require unique databases:

- Performance Management Architect interface data source
- Essbase Studio
  See “Setting Up the Essbase Studio Catalog Database” in Oracle Essbase Studio User’s Guide.
- Extended Analytics for Financial Management
- Each Planning application should have its own repository.
- Performance Scorecard on IBM DB2.
- FDM. Use an Oracle database instance exclusively for FDM.
  For information about the FDM database, see the Oracle Hyperion Financial Data Quality Management DBA Guide.

Upgrade Note!

If you are upgrading from a previous release of EPM System products, use the same database or databases that you used in the previous release.

Using an Oracle Database

Oracle Database Installation Information

- Install Oracle Database client on the following machines:
  - Performance Management Architect Dimension server
  - Financial Management application server
  - Data Relationship Management server
● If your database resides on a remote computer, create a Net Service Name that enables the product to connect to the remote database.

● Use the global database server name when specifying locations and paths. Do not use localhost as a server name.

**Oracle Database Creation Considerations**

For the best compatibility with non-ASCII character sets, the database must be created using Unicode Transformation Format UTF-8 encoding (character set). Use of UTF-8 is required if you need multi-lingual support (multi character set support). Oracle supports the following character sets with UTF-8 encoding:

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

*Note:*

The UTF-8 character set must be applied to the client and to the Oracle database.

**Oracle Database Roles and Privileges**

Oracle Database user IDs should have the following roles and privileges:

● CREATE SESSION
● CREATE VIEW
● RESOURCE

**Required Oracle Database Account (FDM only)**

The default tablespace used by FDM is the Users tablespace. To ensure that users do not exceed a space-used threshold or if you have questions about the appropriate value for the quota, consult with your database administrator.

Oracle recommends that FDM has its Oracle Database instance.

**Oracle Database Sizing Guidelines**

Oracle recommends that you set tablespaces with autoextend on.

<table>
<thead>
<tr>
<th>Product</th>
<th>Sizing Guideline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Services</td>
<td>Start with 100MB, and add more as the number of migrations with Lifecycle Management and the number of audit records increases.</td>
</tr>
</tbody>
</table>
### Sizing Guideline

<table>
<thead>
<tr>
<th>Product</th>
<th>Sizing Guideline</th>
</tr>
</thead>
<tbody>
<tr>
<td>EPM Workspace</td>
<td>The amount of space needed depends on the aggregate size of the objects that you plan to store in the repository. Oracle recommends starting with at least 250 MB, which provides space to expand the EPM Workspace repository without having to increase the data file or tablespace. A shared pool size of 60 MB is used during configuration with EPM System Configurator.</td>
</tr>
<tr>
<td>Performance Management Architect</td>
<td>Oracle recommends starting with at least 250 MB.</td>
</tr>
<tr>
<td>Smart Space</td>
<td>The amount of space needed depends on the aggregate size of the objects that you plan to store in the repository. Oracle recommends starting with at least 250 MB, which provides space to expand the Oracle Smart Space Collaborator, Fusion Edition database without having to increase the data file or tablespace. A shared pool size of 60 MB is used during configuration with EPM System Configurator.</td>
</tr>
<tr>
<td>Administration Services</td>
<td>The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.</td>
</tr>
<tr>
<td>Essbase Studio</td>
<td>The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.</td>
</tr>
</tbody>
</table>
| Planning and Calculation Manager             | ● 100 MB for applications with 5,000 or fewer total members  
● 200 MB for applications with 15,000 or fewer total members  
**Note:** You can adjust the size of the system table database to match the size of the application.                                                                                                                                                                                                                                                                                                    |
| Financial Management and Calculation Manager | ● 100 MB for applications with 5,000 or fewer total members  
● 200 MB for applications with 15,000 or fewer total members  
**Note:** You can adjust the size of the system table database to match the size of the application.                                                                                                                                                                                                                                                                                                |
| Performance Scorecard                        | 500 MB                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Profitability and Cost Management            | 100 MB                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| FDM                                          | See the Oracle Hyperion Financial Data Quality Management DBA Guide.                                                                                                                                                                                                                                                                                                                                                                                                                               |

### Oracle Database Configuration Considerations

#### Tablespace Considerations

<table>
<thead>
<tr>
<th>Product</th>
<th>Tablespace Considerations</th>
</tr>
</thead>
</table>
| General — All products   | ● Consider a global view of tablespaces and allocate one or more tablespaces in order to spread out tables created by EPM System products.  
● Tablespaces can be shared with other applications.                                                                                                                                                                                                                                                                                                                                                                           |
### Tablespace Considerations

- Create a separate tablespace for indexes to improve performance. This action requires CREATE TABLESPACE system privileges.
- Make sure that `SEGMENT SPACE MANAGEMENT` parameter is set to `AUTO` when you create tablespace. This parameter is needed for better performance.

### Reporting and Analysis
Dedicate a tablespace to Reporting and Analysis. Determine the tablespaces to be used as the default tablespace and the temporary tablespace for this user. Do not use the SYSTEM tablespace.

### Financial Management
Set up a temporary tablespace >1GB.

### FDM
See the Oracle Hyperion Financial Data Quality Management DBA Guide.

### Other Parameters
For faster row retrieval, Oracle recommends enabling the parallel query option to permit parallel query activity.

<table>
<thead>
<tr>
<th>Product</th>
<th>Other Parameters</th>
</tr>
</thead>
</table>
| General/All Products | Set the `nls_length_semantics` parameter to `char`:  
                          `nls_length_semantics=char` |
| Shared Services  | For Shared Services to work correctly, set the following parameters:  
                          `nls_language = American`  
                          `nls_territory = America` |
| Planning         | Planning requires that `CURSOR_SHARING` in Oracle be set to the default setting, "EXACT."  
                          If you have performance issues with Planning cube refresh, check this setting to be sure  
                          that it is set to "EXACT." |
| Financial Management | Set Oracle `OPEN_CURSORS` to 5000.                                                |
| Performance Scorecard | Set Oracle `OPEN_CURSORS` to 1500 or higher.                                       |
| FDM              | See the Oracle Hyperion Financial Data Quality Management DBA Guide.               |

### Using a Microsoft SQL Server Database

#### Microsoft SQL Server Database Creation Considerations
When you set the security properties for the database, select the following Authentication option: SQL Server and Windows.
Microsoft SQL Server Roles and Privileges

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

Note:

For FDM, Windows accounts that run MSSQL Server Windows service must have read access to the FDM Data folder.

Microsoft SQL Server Sizing Guidelines

<table>
<thead>
<tr>
<th>Product</th>
<th>Sizing Guideline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Services</td>
<td>Start with 100MB, and add more as the number of migrations with Lifecycle Management and the number of audit records increases.</td>
</tr>
<tr>
<td>EPM Workspace</td>
<td>The amount of space needed depends on the aggregate size of the objects that you plan to store in the repository. Oracle recommends starting with at least 250 MB, which provides space to expand the EPM Workspace repository without having to increase the data file or tablespace. A shared pool size of 60 MB is used during configuration with EPM System Configurator.</td>
</tr>
<tr>
<td>Performance Management Architect</td>
<td>Oracle recommends starting with at least 250MB.</td>
</tr>
<tr>
<td>Smart Space</td>
<td>The amount of space needed depends on the aggregate size of the objects that you plan to store in the repository. Oracle recommends starting with at least 250 MB, which provides space to expand the Smart Space Collaborator database without having to increase the data file or tablespace. A shared pool size of 60 MB is used during configuration with EPM System Configurator.</td>
</tr>
<tr>
<td>Administration Services</td>
<td>The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.</td>
</tr>
<tr>
<td>Essbase Studio</td>
<td>The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.</td>
</tr>
</tbody>
</table>
| Planning and Calculation Manager | • 100 MB for applications with 5,000 or fewer total members  
                                  | • 200 MB for applications with 15,000 or fewer total members  
                                  | Note: You can adjust the size of the system table database to match the size of the application. |
| Financial Management and Calculation Manager | • 100 MB for applications with 5,000 or fewer total members  
                                                   | • 200 MB for applications with 15,000 or fewer total members |
Product | Sizing Guideline
---|---
Performance Scorecard | Note: You can adjust the size of the system table database to match the size of the application.
Oracle Hyperion Profitability and Cost Management, Fusion Edition | 100 MB
FDM | See the Oracle Hyperion Financial Data Quality Management DBA Guide.

Microsoft SQL Server Database Configuration Considerations

<table>
<thead>
<tr>
<th>Product</th>
<th>Tablespace Considerations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reporting and Analysis</td>
<td>The default tablespace for the database user who owns the Reporting and Analysis repository must not be partitioned.</td>
</tr>
</tbody>
</table>

Using an IBM DB2 Database

IBM DB2 Installation Information

During IBM DB2 installation, consider the following:

- When installing IBM DB2, clear the OLAP Starter Kit option.
- For Performance Management Architect, ensure that your DB2 database is installed on a different computer, and not the Dimension Server machine where the DB2 9 Runtime Client and DB2 .NET Data Provider must be installed.

Note:

If DB2 9 Runtime Client is installed on the Performance Management Architect computer, verify that an entry exists in the Global Assembly Cache.

- For Reporting and Analysis, ensure that the IBM DB2 Client Application Enabler is installed on the computers on which you install services. For Core Services and Job Factory Service, if you use an IBM DB2 RDBMS and Reporting and Analysis Services are on separate machines, use the Client Application Enabler to create a client connection to the Reporting and Analysis database.

IBM DB2 Database Creation Considerations

For the best compatibility with non-ASCII character sets, an IBM DB2 database must be created using Unicode Transformation Format UTF-8 encoding (character set). Use of UTF-8 is required if you need multi-lingual support (multi-character set support).
Use the Client Configuration Assistant to set up a database alias that enables the EPM System product to connect to the database. Be sure to select “Register this Database for ODBC and As a System Data Source.”

**IBM DB2 Roles and Privileges**

Database users must be assigned the following privileges:

- CREATETAB
- BINDADD
- CONNECT

**IBM DB2 Sizing Guidelines**

<table>
<thead>
<tr>
<th>Product</th>
<th>Sizing Guideline</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shared Services</td>
<td>Start with 100MB, and add more as the number of migrations with Lifecycle Management and the number of audit records increases.</td>
</tr>
<tr>
<td>EPM Workspace</td>
<td>The amount of space needed depends on the aggregate size of the objects that you plan to store in the repository. Oracle recommends starting with at least 250 MB, which provides space to expand the EPM Workspace repository without having to increase the data file or tablespace. A shared pool size of 60 MB is used during configuration with EPM System Configurator.</td>
</tr>
<tr>
<td>Performance Management Architect</td>
<td>Oracle recommends starting with at least 250MB.</td>
</tr>
<tr>
<td>Oracle Smart Space, Fusion Edition</td>
<td>The amount of space needed depends on the aggregate size of the objects that you plan to store in the repository. Oracle recommends starting with at least 250 MB, which provides space to expand the Smart Space Collaborator database without having to increase the data file or tablespace. A shared pool size of 60 MB is used during configuration with EPM System Configurator.</td>
</tr>
<tr>
<td>Oracle Essbase Administration Services</td>
<td>The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.</td>
</tr>
<tr>
<td>Essbase Studio</td>
<td>The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.</td>
</tr>
<tr>
<td>Planning and Calculation Manager</td>
<td>• 100 MB for applications with 5,000 or fewer total members</td>
</tr>
<tr>
<td></td>
<td>• 200 MB for applications with 15,000 or fewer total members</td>
</tr>
<tr>
<td></td>
<td>Note: You can adjust the size of the system table database to match the size of the application.</td>
</tr>
</tbody>
</table>
### Product Sizing Guideline

<table>
<thead>
<tr>
<th>Product</th>
<th>Sizing Guideline</th>
</tr>
</thead>
</table>
| Financial Management and Hyperion Calculation Manager | ● 100 MB for applications with 5,000 or fewer total members  
 ● 200 MB for applications with 15,000 or fewer total members  
 **Note:** You can adjust the size of the system table database to match the size of the application. |
| Performance Scorecard                        | 500 MB                                                 |

### IBM DB2 Database Configuration Considerations

<table>
<thead>
<tr>
<th>Product</th>
<th>Tablespace Considerations</th>
</tr>
</thead>
</table>
| General — All products                       | Minimum tablespace requirements:  
 ● A bufferpool and a tablespace with a 32 KB pagesize  
 ● A system temporary bufferpool and a system temporary tablespace with a 32 KB pagesize  
 **Note:** The default tablespace for the database user that owns the repository must not be partitioned.  
 Increase settings as follows:  
 ● `bufferpool_name` bufferpool from 1000 (default) to 32000 (about the size of the largest audit table and indexes)  
 ● `IBMDEFAULTBP` bufferpool from 1000 (default) to 100000  
 ● `tmp_bufferpool_name` bufferpool from 1000 (default) to 8000 (temporary space bufferpool)  
 ● `DBHEAP` from 1200 (default) to 33000  
 ● `SORTHEAP` from 256 (default) to 2000  
 ● `LOGBFSIZ` from 16 (default) to 128 |
| Shared Services and Oracle Essbase Studio    | ● Increase the heap size as follows:  
 ○ `drda_heap_sz` parameter — 2048 or higher  
 ○ `stmtheap, applheapsz, and app_ctl_heap_sz` parameters — 8096  
 ● Increase `PAGESIZE` to 32K.  
 ● Increase `bufferpool` to 32768. |
| Performance Management Architect            | ● Increase the heap size as follows:  
 ○ `APP_CTL_HEAP_SZ` to 8096  
 ○ `APPLHEAP_SZ` to 8192  
 ● Ensure that the user has privileges to create tablespaces and buffer pools. |
| Planning                                     | Before you upgrade to Planning, you must configure the database with a large enough tablespace (having a page size of at least 32K) in order to support the Planning tables. |
Product | Tablespace Considerations
--- | ---
The following sample SQL script creates the necessary buffer pool and tablespace. Change the names and the disk location to reflect your needs. By default, the tablespace is named `HSPSPACE8_1` and is created in the `C:\DB2DATA\HSPSPACE8_1` directory. The other settings are also defaults; the administrator should adjust the settings as appropriate for the environment.

Example:

```sql
CREATE BUFFERPOOL hsppool8_1 SIZE 250
PAGESIZE 8 K;

CREATE REGULAR TABLESPACE hspspace8_1
PAGESIZE 8 K
MANAGED BY SYSTEM USING ('c:\db2data\hspspace8_1')
EXTENTSIZE 32 OVERHEAD 24.1 PREFETCHSIZE 8
TRANSFERRATE 0.9 BUFFERPOOL HSPPOOL8_1;
```

The database administrator must make sure that the user who logs on to the Planning relational database has rights to use the new tablespace.

Performance Scorecard–Specific IBM DB2 Database Configuration Requirements

You must complete the following procedure before you configure Oracle Hyperion Performance Scorecard, Fusion Edition.

➤ To prepare the IBM DB2 server:

1. Increase the database log size to 6500.
2. Modify this script with information specific to your database:

```sql
SET HPSDB=<hpsdatabase>
SET ADMIN=<adminusername>
SET ADMINPWD=<adminpassword>
SET TBSFILE=<table space file location>
SET TMPFILE=<temp file location>
DB2 CONNECT TO %HPSDB% USER %ADMIN% USING %ADMINPWD%
DB2 UPDATE DATABASE CONFIGURATION FOR %HPSDB% USING APPLHEAPSZ 512
DB2 CREATE BUFFERPOOL HPS_BP SIZE 250 PAGESIZE 32 K
DB2 TERMINATE
DB2STOP
DB2START
DB2 CONNECT TO %HPSDB% USER %ADMIN% USING %ADMINPWD%
DB2 CREATE REGULAR TABLESPACE HPS_SPACE1 PAGESIZE 32 K MANAGED BY SYSTEM USING ('%TBSFILE%') EXTENTSIZE 32 OVERHEAD 24.1 PREFETCHSIZE 32
TRANSFERRATE 0.9 BUFFERPOOL HPS_BP
DB2 COMMENT ON TABLESPACE HPS_SPACE1 IS 'HPS Table Space'
DB2 GRANT USE OF TABLESPACE HPS_SPACE1 TO PUBLIC
DB2 CREATE SYSTEM TEMPORARY TABLESPACE HPS_TEMP PAGESIZE 32 K MANAGED BY SYSTEM USING ('%TMPFILE%') EXTENTSIZE 32 OVERHEAD 24.1 PREFETCHSIZE 32
```
3 Save the file as name.bat.

4 From the Command Center, execute the script.

5 **Windows 2003 users:** Perform these steps:
   b. On the User Accounts box, click Advanced.
   c. Select DB2Admin, right-click and select Properties.
   d. On the Properties box, select Member Of.
   e. Select Users, click Remove, and click Save.

---

**Preparing Web Application Servers**

Many EPM System products require a Web application server. To identify the products that require an application server and to view the list of supported application servers, see Chapter 3, “System Requirements.”

**General Considerations**

- When deploying to an application server, EPM System products cannot be installed to directories with names that contain spaces; for example, c:\Program Files is not acceptable (unless you use short path notation).
- For automatic deployment, the Web server must reside on the same machine where EPM Workspace will be deployed.
- If different operating system (OS) accounts are used to install and run EPM System and your Web application server, the Web application server OS account must be granted:
  - Read access to the Hyperion home directory, and to all subdirectories and files therein
  - Write access to HYPERION_HOME/logs

In addition, when you use automatic deployment, the EPM System OS account must be granted write access to the application server files and directories.

- Set all Web applications to have a session timeout that exceeds 10 minutes.

**Oracle Application Server**

When EPM System components will be deployed to Oracle Application Server (OAS) in a distributed environment, all of the OAS instances must:

- Reside in the same cluster topology
Use a single instance of the Application Server Control (the Administration OC4J instance) to manage all the instances in the cluster.

Use a supported Web server to route requests to the J2EE containers (OC4J instances).

**Note:**

For this release of EPM System, only Oracle HTTP Server (OHS) is supported for automatic deployment, and it must reside on the same machine where EPM Workspace will be deployed. For other Web servers, you must use manual deployment. For more information, refer to "Configuring Cluster Topologies" in the *Oracle® Application Server Administrator’s Guide*.


**Note:**

The Planning logical address is defined using the “Manage Planning Clusters” task in EPM System Configurator.

**Embedded Java Container**

- Oracle provides the Embedded Java Container, which is provided on the installation media for use with the deployment of EPM System products. Oracle does not support the Embedded Java Container application server for use outside EPM System product installations.
- For automatic deployment, the Web server must reside on the same machine where EPM Workspace will be deployed.

**BEA WebLogic**

You must apply a patch to WebLogic 9.2.1 for use with Shared Services.

To download and install the WebLogic patch:

1. Go to the BEA Support site ([http://support.bea.com](http://support.bea.com)), open a case, and ask for Patch ID CR283953_920ga.jar for WebLogic 9.2.1.
2. Extract the file to any location, and find CR283953_920ga.jar.
3. Navigate to the BEA home directory, for example, directory/weblogic92/common/bin, and open commEnv.cmd|sh in a text editor.
4. Edit WEBSLOGIC_CLASSPATH to include the path to the patch as the first argument, and save commEnv.cmd|sh.
Other considerations:

- For automatic deployment, the Web server must reside on the same machine where EPM Workspace will be deployed.
- When you install WebLogic, make sure to install the plugins (an optional component of the installation), which are required for Reporting and Analysis.
- When deploying all EPM System products to WebLogic application server on one machine, 6 GB of RAM is recommended.

**IBM WebSphere**

- If the WebSphere installation path contains spaces, EPM System products cannot deploy to WebSphere. The default WebSphere installation path for Windows is `Program Files/IBM/WebSphere`. Change the installation path so that no spaces are included.
- For automatic deployment, the Web server must reside on the same machine where EPM Workspace will be deployed.
- Install the plugins from the IBM WebSphere 6.1.x supplemental components CD. They are required for Reporting and Analysis.

**Preparing Web Servers**

For automatic deployment, the Web server must reside on the same machine where EPM Workspace will be deployed.

**Installing Microsoft Internet Information Services**

The following products require IIS to be installed with ASP support enabled:

- Financial Management
- Oracle Hyperion Strategic Finance, Fusion Edition
- FDM

**Verifying the IIS Installation**

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

- IIS Admin Service
- World Wide Web Publishing Service

If you do not see the services for IIS, make sure that IIS is installed.
Enabling Existing .NET 2.0 Framework (Windows 2003)

Performance Management Architect requires .NET 2.0 Framework on the machine where you install the Dimension server. If .NET 2.0 Framework is not installed on your machine, Oracle Hyperion Enterprise Performance Management System Installer, Fusion Edition automatically installs it for you.

If you are using Windows 2003 and .NET 2.0 is installed, you must register and enable .NET 2.0 with IIS.

➤ To enable .NET 2.0 on Windows 2003 machines:

1. Open IIS Manager.
2. In the left pane, select Web Service Extensions.
3. If ASP.NET 2.0 is listed in the right pane, enable it by ensuring that the Status column is set to Allowed.
4. If ASP.NET 2.0 is not listed in the right pane and .NET 2.0 is installed, register .NET 2.0 with IIS:
   a. From the command prompt, go to this directory: C:\Windows\Microsoft.NET\Framework\v2.0.50727
   b. Enter aspnet_regiis.exe —iru.
   c. Repeat steps 1, 2, and 3.

Financial Management Web Server Environment

● For Oracle Enterprise Performance Management Workspace, Fusion Edition configuration of Financial Management, you must use the machine name or actual IP address of the IIS Web server machine. Do not use localhost as the machine name for Financial Management.

● For Apache Web server, for synchronous load requests in Financial Management that take over 5 minutes to respond, avoid a timeout by setting ProxyTimeout to the IIS request timeout (3600s).

Preparing Web Browsers

Browser Settings

Ensure that browser preferences and options are enabled as follows:

● For Internet Explorer and Mozilla Firefox:
  o Enable JavaScript.
  o 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.
  o Allow pop-up windows.
● For Internet Explorer (Reporting and Analysis only):
  ○ Enable ActiveX. See “Enabling ActiveX (Reporting and Analysis)” on page 84.
  ○ Add the Reporting and Analysis Web site to the trusted zone. For example, in Internet Explorer, select Tools > Internet Options > Security Tab > Trusted Sites, and click Sites.

**Enabling ActiveX (Reporting and Analysis)**

To enable EPM System Web applications to function properly, Internet Explorer must be configured to enable support for ActiveX technologies.

EPM System products do not download ActiveX components to the browser. Instead, only HTML, JavaScript, and XML are sent to and by the client browser.

Guidelines to enable XML components:

● In the Web browser security settings, enable ActiveX controls and plug-in execution by setting “Run ActiveX controls and plug-ins” to “Enable.”

● Enable ActiveX controls and plug-in execution by adding the Project Reporting and Analysis site as a trusted site and changing the custom security settings for trusted sites.

● Provide group policies that define the controls required for handling XML (the MS XML parser and XMLHTTPRequest controls) and enable these administrator approved controls for all sites or for select trusted sites.

>Note:

Oracle can provide guidance on how to add and implement these policies.

● All other ActiveX controls and plug-ins remain disabled. Group policies can be implemented by zone by enabling the controls for sites in the trusted zone.

● For Active X enabled controls, enable the setting “Script ActiveX controls marked safe for scripting.”
Default Ports and Shared Services Registry

During the configuration process, default port numbers for most Oracle Hyperion Enterprise Performance Management System products are automatically populated in Shared Services Registry. During configuration, using EPM System Configurator, you can change the default numbers. Each port number on the machine must be unique. (The same product on different machines can have the same port number.) If an error message similar to “port already in use” or “bind error” is displayed, a port number conflict may exist.

If the default port is already in use on the machine or if there is a conflict, EPM System Configurator will not continue. If the default port number is not changed, the software is configured with the default values.

Upgrade Note!

When upgrading products, the port number used in the earlier release is retained in Shared Services Registry. For example, the default listen port for the Shared Services web application was previously 58080 and is now 28080; however, after upgrading Shared Services to 11.1.1, the old port number of 58080 is retained in Shared Services Registry.

Changing Application Server or Web Server Ports

If you change a port number by using application server or web server tools (administration console or configuration file), you must also change the port number by using EPM System Configurator so that the port numbers are synchronized with the Shared Services Registry. After changing a port number by using the application server or web server tools, run EPM System
Configurator and provide the new port number to update the Oracle's Hyperion Shared Services Registry.

**Note:**

When using Oracle Application Server, web applications are accessed through the Oracle HTTP Server port (default is 7777).

**SSL Ports**

For more information about configuring SSL ports, see *Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide*.

**Foundation Services Ports**

See these sections for information about Oracle's Hyperion® Foundation Services ports:

- “Shared Services Ports” on page 86
- “EPM Workspace Ports” on page 87
- “Configuration and Monitoring Console Ports” on page 88
- “Performance Management Architect Ports” on page 88
- “Calculation Manager Web Application Ports” on page 90
- “Smart Space Ports” on page 91

### Shared Services Ports

**Table 12  Shared Services Web Application Ports**

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>28080</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>28443</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown Port for embedded Java container</td>
<td>28081</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/SharedServices9/conf/server.xml</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>28082</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/SharedServices9/conf/server.xml</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
</tbody>
</table>
Table 13  Shared Services Default Service Ports

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remote Authentication Module</td>
<td>28000</td>
<td>Oracle’s Hyperion® Remote Authentication Module installation program</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Additional dynamic port (1)</td>
</tr>
<tr>
<td>OpenLDAP</td>
<td>28089</td>
<td>Windows: Edit the Windows Registry — HKEY_LOCAL_MACHINE/SOFTWARE/OpenLDAP/Parameters/Urls</td>
</tr>
<tr>
<td>Oracle Internet Directory (if used as Oracle’s Hyperion® Shared Services Native Directory)</td>
<td>389, 636 (SSL)</td>
<td>See the Oracle Internet Directory documentation.</td>
</tr>
</tbody>
</table>

EPM Workspace Ports

Table 14  EPM Workspace Default Service Ports

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foundation ports:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Global Services Manager (GSM)</td>
<td>6800 - 6810</td>
<td>Each port listed in this table is assigned a port within the range, either the default range 6800 - 6810, or the range specified during configuration. To identify which port was assigned to each service, use the Configuration and Monitoring Console.</td>
</tr>
<tr>
<td>● Core Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Service Broker</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Job Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Event Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>● Repository Service</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Annotation Service</td>
<td>8199</td>
<td>Configuration and Monitoring Console</td>
</tr>
</tbody>
</table>

Table 15  EPM Workspace Web Server Port

<table>
<thead>
<tr>
<th>Server</th>
<th>Default Server Port</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apache and IBM HTTP Server</td>
<td>19000</td>
<td>WEB_SERVER_HOME/conf/httpd.conf</td>
</tr>
<tr>
<td>IIS and Oracle HTTP Server</td>
<td>80, 443 (SSL)</td>
<td>Microsoft Internet Information Services (IIS) Manager Console. Change the TCP port value setting.</td>
</tr>
</tbody>
</table>

Table 16  EPM Workspace Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>45000</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Additional listen port (1)</td>
<td>Dynamic</td>
<td>Not configurable</td>
</tr>
</tbody>
</table>
### Configuration and Monitoring Console Ports

Table 17  Configuration and Monitoring Console Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration and Monitoring Console UI</td>
<td>55000</td>
<td><code>HYPERION_HOME/common/workspacert/9.5.0.0/ui/conf/server.xml</code></td>
</tr>
<tr>
<td>Configuration and Monitoring Console Agent</td>
<td>6860</td>
<td>Configuration and Monitoring Console</td>
</tr>
</tbody>
</table>

### Performance Management Architect Ports

Table 18 Performance Management Architect Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Performance Management Architect UI</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Listen port</td>
<td>19091 (can be configured for SSL)</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>19143</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>19092</td>
<td><code>HYPERION_HOME/deployments/AppServNameAndVersion/EPMAWebServer/conf/server.xml</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>19093</td>
<td><code>HYPERION_HOME/deployments/AppServNameAndVersion/EPMAWebServer/conf/server.xml</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>Port Type</td>
<td>Default Port Number</td>
<td>Where Configurable</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>---------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Data Synchronizer Web Service (Performance Management Architect)</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Listen port</td>
<td>19101 (can be configured for SSL)</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>19043</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>19102</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/EPMADatasynchronizer/conf/server.xml For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>19103</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/EPMADatasynchronizer/conf/server.xml For parameters, see the application server documentation.</td>
</tr>
</tbody>
</table>

Table 19  Performance Management Architect Dimension Server Default Service Ports

<table>
<thead>
<tr>
<th>Services</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server Manager</td>
<td>5250</td>
<td>HYPERION_HOME/products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/BPMA_Server_Config.xml &lt;ServerManagerPort&gt;portNumber&lt;/ServerManagerPort&gt;</td>
</tr>
<tr>
<td>Process Manager</td>
<td>5251</td>
<td>HYPERION_HOME/products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/BPMA_Server_Config.xml &lt;Port&gt;portNumber&lt;/Port&gt; web.config file under the webservices directory &lt;appSettings&gt; parameter &lt;add key=&quot;ProcessManagerPort&quot; value=&quot;portNumber&quot;/&gt;</td>
</tr>
<tr>
<td>Event Subscription</td>
<td>5252</td>
<td>HYPERION_HOME/products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/BPMA_Server_Config.xml &lt;EventSubscriptionPort&gt;portNumber&lt;/EventSubscriptionPort&gt;</td>
</tr>
<tr>
<td>Event Manager</td>
<td>5253</td>
<td>HYPERION_HOME/products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/BPMA_Server_Config.xml</td>
</tr>
<tr>
<td>Services</td>
<td>Default Port Number</td>
<td>Where Configurable</td>
</tr>
<tr>
<td>----------</td>
<td>---------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Job Manager</td>
<td>5254</td>
<td>HYPERION_HOME/products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/ BPMA_Server_Config.xml &lt;JobManagerPort&gt;portNumber&lt;/JobManagerPort&gt;</td>
</tr>
<tr>
<td>Engine instances</td>
<td>5100-5140</td>
<td>HYPERION_HOME/products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/ BPMA_Server_Config.xml &lt;MinEnginePort&gt;portNumber&lt;/MinEnginePort&gt; &lt;MaxEnginePort&gt;portNumber&lt;/MaxEnginePort&gt;</td>
</tr>
<tr>
<td>Net JNI Bridge</td>
<td>5255</td>
<td>HYPERION_HOME/products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/ BPMA_Server_Config.xml &lt;NetJNIBridgePort&gt;portNumber&lt;/NetJNIBridgePort&gt;</td>
</tr>
</tbody>
</table>

**Note:**
The only Dimension Server service that can be started directly is Process Manager.

**Upgrade Note!**
The Dimension Server services ports have changed for this release. During an upgrade of Oracle Hyperion EPM Architect, Fusion Edition, the old port numbers are changed to the new default ports for this release (listed above). If necessary, you can modify these ports to use the old port numbers.

<table>
<thead>
<tr>
<th>Default Web Server Port</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>80</td>
<td>Microsoft Internet Information Services (IIS) Manager Console. Change the TCP port value setting.</td>
</tr>
</tbody>
</table>

### Calculation Manager Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>8500</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port</td>
<td>8501</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/calcmgr/conf/server.xml</td>
</tr>
<tr>
<td>Port Type</td>
<td>Default Port Number</td>
<td>Where Configurable</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>8502</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/calcmgr/conf/server.xml</td>
</tr>
</tbody>
</table>

For parameters, see the application server documentation.

## Smart Space Ports

<table>
<thead>
<tr>
<th>Type of Port</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smart Space Collaborator Client</td>
<td>5222</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Smart Space Collaborator Admin Console</td>
<td>17086</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Oracle Smart Space Collaborator, Fusion Edition Secure Admin Console</td>
<td>17096</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Web application listen port</td>
<td>17080</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Web application SSL listen port</td>
<td>17090</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Web application shutdown port</td>
<td>17081</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/SmartSpaceWebServices/conf/server.xml</td>
</tr>
<tr>
<td>Web application AJP connector port</td>
<td>17082</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/SmartSpaceWebServices/conf/server.xml</td>
</tr>
</tbody>
</table>

For parameters, see the application server documentation.

## Essbase Ports

See these sections for information about Oracle Essbase ports:

- “Essbase Ports” on page 92
- “Administration Services Ports” on page 92
- “Provider Services Ports” on page 93
- “Smart Search Ports” on page 93
- “Essbase Studio Ports” on page 94
- “Application Builder for .NET Ports” on page 94
Essbase Ports

Table 22  Essbase Default Service Ports

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Essbase Agent</td>
<td>1423</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Essbase server applications (ESSSVR)</td>
<td>32768–33768 (two ports per process)</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Oracle Essbase Integration Services Server</td>
<td>3388</td>
<td>HYPERION_HOME/products/</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Essbase/eis/bin/ais.cfg</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Add -Pportnumber</td>
</tr>
</tbody>
</table>

Note:

Starting in release 11.1.1, if you do not specify Oracle Essbase port numbers in EPM System Configurator, the default ports are used.

Note:

When multiple instances of Essbase Server are installed on one computer, you must specify a unique port number for each instance. By default, the first instance of Essbase Server uses port number 1423, which is specified in EPM System Configurator. Specify a different port number for the second instance during configuration with EPM System Configurator. You connect to subsequent installations by specifying the machine name and the agent port number, in the form: machineName:agentPort when connecting.

Administration Services Ports

Table 23  Administration Services Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>10080</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>10083</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>10081</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/eas/conf/server.xml</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>10082</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/eas/conf/server.xml</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
</tbody>
</table>
## Provider Services Ports

**Table 24  Provider Services Web Application Ports**

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>13080</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>13083</td>
<td>EPM System Configurator</td>
</tr>
</tbody>
</table>
| Shutdown port for embedded Java container         | 13081               | HYPERION_HOME/deployments/AppServNameAndVersion/aps/conf/server.xml  
For parameters, see the application server documentation. |
| AJP connector port                                | 13082               | HYPERION_HOME/deployments/AppServNameAndVersion/aps/conf/server.xml  
For parameters, see the application server documentation. |

## Smart Search Ports

**Table 25  Smart Search Web Application Ports**

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>16080</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>16843</td>
<td>EPM System Configurator</td>
</tr>
</tbody>
</table>
| Shutdown port for embedded Java container         | 16081               | HYPERION_HOME/deployments/AppServNameAndVersion/SmartSearch/conf/server.xml  
For parameters, see the application server documentation. |
| AJP connector port                                | 16082               | HYPERION_HOME/deployments/AppServNameAndVersion/SmartSearch/conf/server.xml  
For parameters, see the application server documentation. |
**Essbase Studio Ports**

**Table 26  Essbase Studio Ports**

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>3000</td>
<td>(HYPERION_HOME/products/Essbase/EssbaseStudio/Server/server.properties) transport.port=new port number</td>
</tr>
<tr>
<td>HTTP listen port</td>
<td>9080</td>
<td>(HYPERION_HOME/products/Essbase/EssbaseStudio/Server/server.properties) Server.httpPort=new port number</td>
</tr>
</tbody>
</table>

**Application Builder for .NET Ports**

**Table 27  Application Builder for .NET Web Application Ports**

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>22080</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>22083</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>22081</td>
<td>(HYPERION_HOME/deployments/AppServNameAndVersion/habnet/conf/server.xml) For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>22082</td>
<td>(HYPERION_HOME/deployments/AppServNameAndVersion/habnet/conf/server.xml) For parameters, see the application server documentation.</td>
</tr>
</tbody>
</table>

**Reporting and Analysis Ports**

See these sections for information about Oracle's Hyperion Reporting and Analysis ports:

- “Financial Reporting Ports” on page 95
- “Interactive Reporting Ports” on page 96
- “Web Analysis Ports” on page 96
## Financial Reporting Ports

### Table 28  Financial Reporting Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>8200</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>8243</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>8201</td>
<td><code>HYPERION_HOME/deployments/AppServNameAndVersion/FinancialReporting/conf/server.xml</code> For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>8202</td>
<td><code>HYPERION_HOME/deployments/AppServNameAndVersion/FinancialReporting/conf/server.xml</code> For parameters, see the application server documentation.</td>
</tr>
</tbody>
</table>

### Table 29  Financial Reporting Default Service Ports

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Reporting Report Service</td>
<td>Dynamic (2)</td>
<td><code>HYPERION_HOME/products/biplus/lib/fr_repserver.properties</code> Parameters: HRRepSvrPort1, HRRepSvrPort2</td>
</tr>
<tr>
<td>Financial Reporting Print Service</td>
<td>Dynamic</td>
<td><code>HYPERION_HOME/products/biplus/lib/fr_printserver.properties</code> Parameter: HRPrintSvrPort</td>
</tr>
<tr>
<td>Remote ADM Server port for Planning datasource access</td>
<td>Dynamic</td>
<td><code>HYPERION_HOME/common/ADM/VERSION/lib/ADM.properties file on the Report Server machine</code> Parameter: ADM_RMI_SERVER_PORT</td>
</tr>
</tbody>
</table>
Interactive Reporting Ports

Table 30  Interactive Reporting Default Service Ports

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Access Service (DAS)</td>
<td>6810 - 6816</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Oracle’s Hyperion® Interactive Reporting Service</td>
<td></td>
<td>Configuration and Monitoring Console</td>
</tr>
<tr>
<td>Logging Service</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each port listed in this table is assigned a port within the range, either the default range 6810 - 6816, or the range specified during configuration.

To identify which port was assigned to each service, use the Configuration and Monitoring Console.

Web Analysis Ports

Table 31  Web Analysis Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>16000</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Additional listen ports (2)</td>
<td>Dynamic</td>
<td>Not configurable</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>16043</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>16001</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/WebAnalysis/conf/server.xml For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>16002</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/WebAnalysis/conf/server.xml For parameters, see the application server documentation.</td>
</tr>
</tbody>
</table>

Financial Performance Management Applications Ports

See these sections for information about Oracle’s Hyperion Financial Performance Management Applications ports:

- “Financial Management Ports” on page 97
- “Planning Ports” on page 97
- “Performance Scorecard Ports” on page 98
Financial Management Ports

Table 32  Financial Management Default Service Port

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>See the Microsoft support article describing how to set the ports used by DCOM:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Search for &quot;restrict DCOM port.&quot;</td>
</tr>
</tbody>
</table>

Table 33  Financial Management Web Server Port

<table>
<thead>
<tr>
<th>Default Web Server Port</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>80 (HTTP) or 443 (when SSL is enabled)</td>
<td>In Microsoft Internet Information Services (IIS) Manager Console, change the TCP port value setting.</td>
</tr>
</tbody>
</table>

Planning Ports

Table 34  Planning Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>8300</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Additional listen port (1)</td>
<td>Dynamic</td>
<td>Not configurable</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>8343</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>8301</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/HyperionPlanning/conf/server.xml For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>8302</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/HyperionPlanning/conf/server.xml For parameters, see the application server documentation.</td>
</tr>
</tbody>
</table>
### Table 35  Planning Default Service Port

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning RMI Server</td>
<td>11333</td>
<td><code>HYPERION_HOME/common/RMI/VersionNumber/HyperionRMI_Port.properties</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Parameter:</strong> registryPort</td>
</tr>
</tbody>
</table>

**Note:** For information about additional requirements when changing Oracle Hyperion Planning, Fusion Edition ports, see “Reconfiguring EPM System Products” in Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide.

### Performance Scorecard Ports

#### Table 36  Performance Scorecard Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>18080</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>18443</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>18081</td>
<td><code>HYPERION_HOME/deployments/AppServNameAndVersion/HPSWebReports/conf/server.xml</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>18082</td>
<td><code>HYPERION_HOME/deployments/AppServNameAndVersion/HPSWebReports/conf/server.xml</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
</tbody>
</table>

#### Table 37  Performance Scorecard Alerter Web Application Ports

<table>
<thead>
<tr>
<th>Port Type</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Listen port</td>
<td>18090</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>18444</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>18091</td>
<td><code>HYPERION_HOME/deployments/AppServNameAndVersion/HPSAlerter/conf/server.xml</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>18092</td>
<td><code>HYPERION_HOME/deployments/AppServNameAndVersion/HPSAlerter/conf/server.xml</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td>For parameters, see the application server documentation.</td>
</tr>
<tr>
<td>Port Type</td>
<td>Default Port Number</td>
<td>Where Configurable</td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Listen port</td>
<td>6756</td>
<td>EPM System Configurator</td>
</tr>
<tr>
<td>Additional listen port</td>
<td>Dynamic</td>
<td>Not configurable</td>
</tr>
<tr>
<td>SSL listen port</td>
<td>6743</td>
<td>Oracle’s Hyperion Enterprise Performance Management System Configurator</td>
</tr>
<tr>
<td>Shutdown port for embedded Java container</td>
<td>6757</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/Profitability/conf/server.xml</td>
</tr>
<tr>
<td>AJP connector port</td>
<td>6758</td>
<td>HYPERION_HOME/deployments/AppServNameAndVersion/Profitability/conf/server.xml</td>
</tr>
</tbody>
</table>

Profitability and Cost Management Ports

Table 38  Profitability and Cost Management Default Ports

Data Management Ports

See these sections for information about Oracle’s Data Management ports.

- “FDM Ports” on page 99
- “Data Relationship Management Ports” on page 100

FDM Ports

Table 39  FDM Default Service Ports

Service                               | Default Port Number | Where Configurable                                                                 |
--------------------------------------|---------------------|-----------------------------------------------------------------------------------|
FDM load balancer FDM application server | 135-plus ephemeral high-range ports (1024–65536) | Windows settings—Fix DCOM ephemeral ports. For more information, see the Microsoft support article describing how to set the ports used by DCOM: [http://](http://)
### File sharing

- **Service:** NetBIOS Datagram Service
  - **Default Port Number:** Port 138
- **Service:** NetBIOS Name Resolution
  - **Default Port Number:** Port 137
- **Service:** NetBIOS Session Service
  - **Default Port Number:** Port 139

If NetBIOS is turned OFF, then use SMB = Port 445

### Firewall

- **Default Port Number:** 135 plus ephemeral high-range ports (1024–65536)
- **Where Configurable:** Windows settings—Fix DCOM ephemeral ports.

For more information, see the Microsoft support article describing how to set the ports used by DCOM: [http://support.microsoft.com](http://support.microsoft.com). Search for "restrict DCOM port."

### Note:

For Oracle Hyperion Financial Data Quality Management, Fusion Edition, the DCOM port 135 must be open if you are running in a DMZ environment.

### Table 40  FDM Web Server Port

<table>
<thead>
<tr>
<th>Default Web Server Port</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>80 (HTTP) or 443 (HTTPS)</td>
<td>Microsoft Internet Information Services (IIS) Manager Console. (Change the TCP port value setting.)</td>
</tr>
</tbody>
</table>

### Data Relationship Management Ports

### Table 41  Data Relationship Management Default Service Port

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Hyperion Data Relationship</td>
<td>135-plus ephemeral high-range ports (1024-65536)</td>
<td>● config.xml using the Data Relationship Management Console</td>
</tr>
<tr>
<td>Management, Fusion Edition</td>
<td></td>
<td>● Windows settings—Fix DCOM ephemeral ports. For more information, see the Microsoft support article describing</td>
</tr>
</tbody>
</table>
how to set the ports used by DCOM: http:// support.microsoft.com. Search for "restrict DCOM port."

<table>
<thead>
<tr>
<th>Service</th>
<th>Default Port Number</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Table 42  Data Relationship Management Web Server Ports**

<table>
<thead>
<tr>
<th>Default Web Server Ports</th>
<th>Where Configurable</th>
</tr>
</thead>
<tbody>
<tr>
<td>80 (HTTP)</td>
<td>Microsoft Internet Information Services (IIS) Manager Console. (Change the TCP port value setting.)</td>
</tr>
<tr>
<td>443 (HTTPS)</td>
<td></td>
</tr>
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