



ORACLE® HYPERION ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

RELEASE 11.1.1

INSTALLATION START HERE

ORACLE®
ENTERPRISE PERFORMANCE
MANAGEMENT SYSTEM

EPM System Installation Start Here, 11.1.1

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Installation Documentation Roadmap

Check the [Oracle Documentation Library \(http://www.oracle.com/technology/documentation/epm.html\)](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

Task	Related Documentation
Planning the installation	This guide, <i>Oracle Hyperion Enterprise Performance Management System Installation Start Here</i>
<ul style="list-style-type: none">● Installing and configuring EPM System products● Automatically deploying EPM System products● Starting EPM System products● Validating the installation● Upgrading EPM System products	<i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</i>
Provisioning users	<i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i>

Table 2 Documentation That You Might Need

Task	Related Documentation
Manually deploying EPM System products	<i>Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide</i>
Troubleshooting installations	<i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide</i>
Creating a backup of product and application data	<i>Oracle Hyperion Enterprise Performance Management System Backup and Recovery Guide</i>
Migrating from one environment to another	<i>Oracle Hyperion Enterprise Performance Management System Lifecycle Management Guide</i>

Task	Related Documentation
Enabling SSL	<i>Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide</i>
Replicating EPM System applications for high availability	<i>Oracle Hyperion Enterprise Performance Management System High Availability Guide</i>

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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/) (<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

Product	Description
Oracle's Hyperion® Shared Services	<p>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.</p> <p>Note: Also includes Oracle's Hyperion® Remote Authentication Module if you run Shared Services on UNIX and authenticate users with NTLM.</p>
Oracle Enterprise Performance Management Workspace, Fusion Edition	<p>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:</p> <ul style="list-style-type: none">● Reporting and Analysis● Oracle Hyperion Planning, Fusion Edition● Oracle Hyperion Profitability and Cost Management, Fusion Edition● Oracle Hyperion Financial Management, Fusion Edition● Oracle Hyperion EPM Architect, Fusion Edition● Oracle Hyperion Performance Scorecard, Fusion Edition● Hyperion Calculation Manager <p>In addition, BI Publisher and Oracle BI EE can be configured to integrate with EPM Workspace.</p>
Performance Management Architect	<p>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.</p> <p>Performance Management Architect works with the following products:</p> <ul style="list-style-type: none">● Planning● Financial Management● Oracle Essbase● Profitability and Cost Management
Calculation Manager	<p>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.</p>

Product	Description
Oracle Hyperion Smart View for Office, Fusion Edition	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.
Oracle Smart Space, Fusion Edition	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.

Essbase

Product	Description
Essbase	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 "what-if" 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.
Oracle Essbase Administration Services	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).
Oracle's Hyperion® Business Rules	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.
Oracle Essbase Integration Services	Integration Services provides a suite of graphical tools that can be used to create Essbase databases, OLAP models, and metaoutlines.

Product	Description
Oracle Hyperion Provider Services	<p>Provider Services is a middle-tier data-source provider to the following products:</p> <ul style="list-style-type: none"> ● Essbase ● Planning ● Oracle BI EE ● Smart View for Office, Java API (Essbase data only) ● XMLA clients (Essbase data only) <p>The software supports highly concurrent analytical scenarios and provides scalability and reliability in a distributed Web-enabled enterprise environment.</p>
Oracle Hyperion Smart Search, Fusion Edition	<p>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.</p>
Oracle Essbase Studio	<p>Essbase Studio consolidates cube-construction activities into one interface, enabling consistent performance for data load and outline build.</p>
Oracle's Hyperion® Application Builder for .NET	<p>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:</p> <ul style="list-style-type: none"> ● .NET Framework compatibility ● Web Services-based architecture (SOAP)

Reporting and Analysis

Product	Description
Oracle's Hyperion® Interactive Reporting	<p>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.</p>
Oracle Hyperion Financial Reporting, Fusion Edition	<p>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.</p>

Product	Description
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

Product	Description
Planning	<p>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.</p> <p>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.</p>
Financial Management	<p>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.</p> <p>Financial Management users can create applications by using Performance Management Architect or Financial Management Classic.</p>
Performance Scorecard	<p>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.</p>
Oracle Hyperion Strategic Finance, Fusion Edition	<p>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.</p>

Product	Description
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

Product	Description
Oracle's Hyperion® Data Integration Management	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.
Data Integration Management Adapters	Data Integration Management Adapters enable you to retrieve and write data for Essbase, Performance Scorecard, Financial Management, and Planning.
Oracle Hyperion Financial Data Quality Management, Fusion Edition	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.
Oracle Hyperion Data Relationship Management, Fusion Edition	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.

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

Product	Client Tier	Web Application Tier		Services Tier
		Web Server*	Web Application Server	
Shared Services			X	
EPM Workspace		X	X	X
Performance Management Architect	X	X	X	X
Calculation Manager		X	X	
Smart View for Office	X			
Smart Space	X		X	X

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

Essbase

Product	Client Tier	Web Application Tier		Services Tier
		Web Server*	Web Application Server	
Essbase	X			X
Administration Services	X		X	
Integration Services	X			X
Provider Services	X		X	
Smart Search			X	
Essbase Studio	X			X
Application Builder for .NET	X		X	

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

Reporting and Analysis

Product	Client Tier	Web Application Tier		Services Tier
		Web Server*	Web Application Server	
Interactive Reporting	X			X
Financial Reporting	X	X	X	X

Product	Client Tier	Web Application Tier		Services Tier
		Web Server*	Web Application Server	
Oracle's Hyperion® SQR® Production Reporting	X			X
Web Analysis	X	X	X	

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

Financial Performance Management Applications

Product	Client Tier	Web Application Tier		Services Tier
		Web Server*	Web Application Server	
Planning	X	X	X	
Financial Management	X	X		X
Performance Scorecard			X	
Strategic Finance	X	X		X
Profitability and Cost Management		X	X	

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

Data Management

Product	Client Tier	Web Application Tier		Services Tier
		Web Server*	Web Application Server	
Data Integration Management	X	X		X
Data Integration Management Adapters	X			X
FDM	X	X		X
Data Relationship Management	X	X		X

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

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System Requirements

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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

Operating System	Processor*	Notes
Windows: <ul style="list-style-type: none"> ● Windows Vista (all editions except Home series) ● Windows XP Professional SP2 ● Windows Server 2003 SP1 (R2 is also supported) 	x86-32 Windows 2003 SP1 also supports x86-64.†	

*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.”](#)

Runtime Client	Required For
<ul style="list-style-type: none"> ● Essbase—The Essbase runtime client is installed automatically. ● Microsoft SQL Server 2000 SP3a Analysis Services ● Microsoft SQL Server 2005 SP1 Analysis Services 	<ul style="list-style-type: none"> ● Financial Reporting ● Interactive Reporting ● Production Reporting ● Web Analysis
<ul style="list-style-type: none"> ● 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. ● 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. 	<ul style="list-style-type: none"> ● Financial Reporting ● Web Analysis
Essbase—The Essbase runtime client is installed automatically.	Planning

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.

Product Family	Component	Disk Space (Minimum)*	Notes
EPM System Installer	EPM System Installer and all EPM System product assemblies	8 GB	After installation, the installation files and assemblies can be removed.
Foundation Services	Common client components	200 MB	
	Smart View for Office	50 MB	
	Smart Space Client	200 MB	
	Smart Space Administration Utility	40 MB	
	Performance Management Architect	10 MB	File generator and batch client components only
Essbase	Essbase Runtime Client	75 MB	
	Essbase Administration Services Console	150 MB	
	Essbase Integration Services Console	45 MB	
	Essbase Studio Console	40 MB	

Product Family	Component	Disk Space (Minimum)*	Notes
Reporting and Analysis	Oracle Hyperion Financial Reporting Studio, Fusion Edition	200 MB	
	Oracle's Hyperion® Interactive Reporting Studio	350 MB	
	Oracle's Hyperion® Dashboard Development Services	95 MB	
	Oracle's Hyperion® SQR® Production Reporting Studio	45 MB	
	Oracle's Hyperion® SQR® Production Reporting Activator	15 MB	
	Production Reporting Remote	5 MB	
	Production Reporting Viewer	20 MB	
	Oracle's Hyperion® Web Analysis Studio	20 MB	
Financial Performance Management Applications	Offline Planning	140 MB	
	Financial Management Client	50 MB	
	Strategic Finance Client	250 MB	
	Oracle Hyperion Strategic Finance Reader	250 MB	
Oracle's Data Management	FDM Workbench	510 MB	
	Data Relationship Management Client	20 MB	
	Hyperion® System™ 9 Data Integration Management™ BPM Adapters	15 MB	175 MB for Oracle's Hyperion® Data Integration Management Adapter for Essbase® (not including Essbase Runtime Client)

*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)

Supported Web Browsers	Notes
Microsoft Internet Explorer 6.0 – 7.0.x	
Firefox 2.0.x	<p>The following products do not support Firefox:</p> <ul style="list-style-type: none"> ● Smart Space* ● Application Builder for .NET ● Performance Scorecard ● FDM ● Data Relationship Management (Web Publishing) <p>Smart View does not support Web Launch from applications running on Firefox.</p>

*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

Supported Versions	Required For
JRE 1.5.0_12 to 1.5.0_12+	<ul style="list-style-type: none"> ● Web Analysis ● Performance Scorecard

Java Runtime Environment

JRE is installed automatically with the products that require it.

Platform	Processor	Supported Windows Versions
32-bit	x86	JRE 1.5.0 Update 12

Other Third-Party Software

Supported Software	Notes
Microsoft .NET Framework 2.0	Required only for Smart Space.
Adobe Acrobat Reader 6.0 or later	
DCOM enabled on the client computer	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.
<p>One of the following:</p> <ul style="list-style-type: none"> ● Microsoft Office 2007 ● Microsoft Office 2003 ● Microsoft Office XP (2002) 	<p>A version of Microsoft Excel is required to use Smart View and Offline Planning with:*</p> <ul style="list-style-type: none"> ● Reporting and Analysis ● Financial Management ● Planning ● Essbase <p>Strategic Finance also requires a version of Excel.</p>
<p>Microsoft SQL Server (2005 SP1 or 2000 SP3a) Analysis Services client</p> <p>Optional—used to connect to Microsoft SQL Server Analysis Services datasources.</p>	<p>Required only for:</p> <ul style="list-style-type: none"> ● Interactive Reporting ● Financial Reporting[†] ● Web Analysis
<ul style="list-style-type: none"> ● SAP GUI 6.20 OLE DB for OLAP Provider ● SAP GUI 6.4 OLE DB for OLAP Provider 	Required only for Interactive Reporting
<p>SAP Java Connector (JCO) 2.1.7[‡]</p> <p>Optional—used to connect to SAP BW</p>	<p>Required only for:</p> <ul style="list-style-type: none"> ● Financial Reporting ● Production Reporting ● Web Analysis

*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>.

Foundation Services

This section lists the requirements for:

- Shared Services

- 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

Operating System	Processor	Notes
Windows 2003 SP1 (R2 is also supported)	x86-32 32-bit	
Windows 2003 SP1, Server Enterprise x64 Edition (R2 is also supported)	x86-64 64-bit	

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.

Component	Disk Space (Minimum)	RAM (Minimum)
Shared Services	400 MB*	1.5 GB
EPM Workspace	1 GB For services: 200 MB For importing files: 1 GB	1 GB For services: 1 GB
Performance Management Architect	50 MB	1 GB for Dimension Server 512 MB each for Web Tier and Data Synchronizer

Component	Disk Space (Minimum)	RAM (Minimum)
Calculation Manager	20 MB	256 MB
Smart Space	600 MB	1 GB

*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.

Required Component	Required For	Notes
Shared Services	All products except Data Integration Management	Not required if using native authentication for: <ul style="list-style-type: none"> ● Essbase ● Data Relationship Management ● FDM <p>Note: Shared Services is required if using these products with other EPM System products that require Shared Services.</p>
EPM Workspace	<ul style="list-style-type: none"> ● Performance Management Architect (includes Calculation Manager) ● Planning ● Financial Management ● Performance Scorecard ● Profitability and Cost Management ● All Reporting and Analysis components 	
Performance Management Architect	<ul style="list-style-type: none"> ● Calculation Manager ● Profitability and Cost Management 	Optional for use with: <ul style="list-style-type: none"> ● Planning ● Financial Management

Other Third-Party Software

Third-Party Software	Notes
Microsoft .NET Framework 2.0	Required only for Performance Management Architect; if not present, installed automatically by EPM System Installer.

Repository Databases

A repository database is required for:

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

Supported Relational Database Repositories	Notes
Oracle Database 9.2.0.5 - 11g (11.1.0.6.0)*	For Performance Management Architect, the Oracle Database client must be installed on the Dimension Server machine.
IBM DB2 8.2 FP4 - 9.1x	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.
Microsoft SQL Server 2000 SP3a - 2005†	

*For all supported versions of Oracle Database: Includes support for RAC - Real Application Cluster and ASM. (2) 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.

Supported Web Application Servers	Notes
Oracle Application Server 10g (10.1.3.3.x)*	If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.
WebLogic 9.2 (MP1 minimum) – 9.2x ^{†‡}	
IBM WebSphere 6.1.0.7 – 6.1.0.x ^d	
Apache Tomcat 5.5.17 ^e	

*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.

^dWebSphere 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

Supported Web Servers	Supported Application Servers	Notes
Oracle HTTP Server 10g (10.1.3.3.x)	<ul style="list-style-type: none"> ● Oracle Application Server 	
Apache HTTP Server 2.0.61	<ul style="list-style-type: none"> ● Tomcat ● WebLogic ● WebSphere 	
IBM HTTP Server 6.1	<ul style="list-style-type: none"> ● WebSphere 	
Microsoft IIS 6.0 (on Windows 2003 SP1)	<ul style="list-style-type: none"> ● Oracle Application Server ● WebLogic ● WebSphere ● Tomcat 	

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*.

User Directories	Notes
Lightweight Directory Access Protocol (LDAP): <ul style="list-style-type: none">● IBM Tivoli Directory Server 6.1● Sun ONE 5.2 SP4● Novell eDirectory 8.8● OpenLDAP 2.3.37	
Microsoft: <ul style="list-style-type: none">● Microsoft Active Directory 2003● Microsoft Active Directory 2000● Microsoft NTLM*	NTLM is not supported with Financial Management on 64-bit platforms.
SAP Directory: <ul style="list-style-type: none">● Enterprise Portal 6 SP16 or 7.0● Netweaver BI (SAP BW) 3.5 or 7.0● SAP R/3 Enterprise 5.0	Applies only to: <ul style="list-style-type: none">● Shared Services● Reporting and Analysis
Database providers: <ul style="list-style-type: none">● Oracle 9.2.0.5 - 11g (11.1.0.6.0)†● IBM DB2 9.1 - 9.1x‡● Microsoft SQL Server 2000 SP3a - 2005 SP1	

*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	Notes
Directory Services: <ul style="list-style-type: none"> ● Oracle Internet Directory 10.1.4.0.1 and higher ● Oracle Virtual Directory 10.1.4.0.1 and higher 	Oracle Internet Directory is supported as an external user directory and as the Shared Services Native Directory. See <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> .
Access Management: <ul style="list-style-type: none"> ● Oracle Access Manager 10.1.4.0.1 and higher ● Oracle Application Server Single Sign-On 	Not supported for FDM.
Identity Management: Oracle Identity Manager 10.1.4.0.1 and higher	Not supported for FDM.
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

Operating System	Processor	Notes
Windows 2003 SP1 (R2 is also supported)	x86-32 32-bit	
Windows 2003 SP1, Server Enterprise x64 Edition (R2 is also supported)	x86-64 64-bit	Applies only to 64-bit Essbase and Administration Services. Other component binaries are 32-bit.

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:

Client	Server	Essbase Server: Platform to Which Client Can Connect
32-bit Essbase Administration Services Console	32-bit Administration Server	32-bit, 64-bit
32-bit Essbase Administration Services Console	64-bit Administration Server	32-bit, 64-bit
64-bit Essbase Administration Services Console	64-bit Administration Server	64-bit
32-bit Essbase Integration Services Console	32-bit Essbase Integration Server	32-bit , 64-bit
32-bit Essbase Integration Services Console	64-bit Essbase Integration Server	32-bit , 64-bit
32-bit Smart View	32-bit Provider Services	32-bit, 64-bit
32-bit Smart View	64-bit Provider Services	64-bit
32-bit Essbase Administration Services Console	32-bit Provider Services	32-bit, 64-bit
64-bit Essbase Administration Services Console	64-bit Provider Services	64-bit
32-bit Java API or XMLA client application	32-bit Provider Services	32-bit, 64-bit
64-bit Java API or XMLA client application	64-bit Provider Services	64-bit

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:

Client Development: Platform with API Version	Platform on which Client Can Run	Essbase Server: Platforms to Which Client Can Connect
32-bit C API	32-bit	32-bit, 64-bit
32-bit VB API	32-bit Windows	32-bit, 64-bit
	64-bit Windows	64-bit
32-bit Java API or XMLA client application	32-bit Provider Services server	32-bit, 64-bit
32-bit embedded Java API client application		32-bit, 64-bit
64-bit C API	64-bit	64-bit
64-bit Java API or XMLA client application	64-bit Provider Services server	64-bit
64-bit embedded Java API client application		64-bit

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.

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

*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

Platform	Windows
32-bit	10 MB + (700 bytes * number of members)
64-bit	20 MB + (900 bytes * number of members)

EPM System Software

Required Software	Required For
Shared Services	<ul style="list-style-type: none"> ● Essbase (unless using Essbase in native security mode) ● Administration Services ● Essbase Studio ● Smart Search
Essbase	<ul style="list-style-type: none"> ● Administration Services ● Integration Services ● Smart Search ● Essbase Studio
Administration Services	<ul style="list-style-type: none"> ● Provider Services

Required Software	Required For
	<ul style="list-style-type: none"> ● Essbase Studio
Provider Services	Smart View

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:

- Administration Services
- Provider Services
- Smart Search
- Oracle's Hyperion® Application Builder for .NET

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*.

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

*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.

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.

Relational Database	ODBC Driver (Windows)
Oracle 11g (11.1.0.6.0); maximum version Oracle 9i (9.2.0.5); minimum version	DataDirect Driver 5.2
IBM DB2 UDB 9.1x; maximum version IBM DB2 UDB 8.2 FP4; minimum version*	DataDirect Driver 5.2
Microsoft SQL Server 2005; maximum version	SQL Server 2005 ODBC native driver [†]
Microsoft SQL Server 2000 SP3a; minimum version	SQL Server 2000 ODBC native driver [‡]
MySQL 5.x ^d	MySQL Connector/ODBC 3.51x and above ^{ef}
Oracle Business Intelligence Enterprise Edition (OBIEE) 10.1.3.4 and above ^g	Oracle BI Server ODBC 10.1.3.4 and above
Teradata V2R5.1	Teradata 3.05 ODBC ^h
Teradata V2R6.0 and later	Teradata 3.06 ODBC ⁱ

*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.

^dMySQL is supported as a data source, but not as an Essbase Studio catalog.

^eMySQL ODBC driver must be obtained separately from MySQL.

^fEssbase, 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.

^gOBIEE is supported as a data source, but not as an Essbase Studio catalog.

^hTeradata ODBC drivers must be obtained separately from Teradata Corporation.

ⁱTeradata 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.

Relational Database	Windows
Oracle 11g (11.1.0.6.0); maximum version Oracle 9i (9.2.0.5); minimum version	DataDirect Driver 5.2
IBM DB2 UDB 9.1.x IBM DB2 UDB 8.2 FP4* IBM DB2 UDB 8.1.7a IBM DB2 v7x for z/OS†	DataDirect Driver 5.2
Microsoft SQL Server 2005; maximum version	SQL Server 2005 ODBC native driver‡
Microsoft SQL Server 2000 SP3a; minimum version	SQL Server 2000 ODBC native driver ^d
MySQL 5.x ^e	MySQL Connector/ODBC 3.51x and above ^f
Teradata V2R5.1 ^g	Teradata 3.05 ODBC ^h
Teradata V2R6.0 and later ⁱ	Teradata 3.06 ODBC ^j
Teradata 12.0.x ^k	Teradata 12.0 ODBC ^l

*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.

^dMicrosoft 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.

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.

Relational Database	JDBC Driver (Windows)
Teradata V2R5.1*	03.01.00.10 03.03.00.06 03.04.00.03
Teradata V2R6.0 and later†	03.01.00.102 03.02.00.03
Teradata 12.0.x‡	12.00.00.01

*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

Relational Database	Windows
Oracle 10g (10.1.0.5) Oracle 10g (10.1.0.3) Oracle 9i (9.2.0.1)	DataDirect Driver 5.2
IBM DB2 UDB 9.1x IBM DB2 UDB 8.2 FP4* IBM DB2 UDB 8.1.7a IBM DB2 v7x for z/OS	DataDirect Driver 5.2
Microsoft SQL Server 2005	SQL Server 2005 ODBC native driver†
Microsoft SQL Server 2000 SP3a	SQL Server 2000 ODBC native driver‡
Teradata V2R5.1	Teradata 3.05 ODBC ^d
Teradata V2R6.0 and later	Teradata 3.06 ODBC ^e
Teradata 12.0.x	Teradata 12.0 ODBC ^f

*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.

^dTeradata ODBC drivers must be obtained separately from Teradata Corporation.

^eTeradata ODBC drivers must be obtained separately from Teradata Corporation.

^fTeradata ODBC drivers must be obtained separately from Teradata Corporation.

64-bit

Relational Database	Windows
Oracle 10g (10.1.0.5) Oracle 10g (10.1.0.3) Oracle 9i (9.2.0.1)	DataDirect Driver 5.2
IBM DB2 9.1x IBM DB2 UDB 8.2 FP4* IBM DB2 UDB 8.1.7a	DataDirect Driver 5.2
Microsoft SQL Server 2005	SQL Server 2005 ODBC native driver [†]
Microsoft SQL Server 2000 SP3a	SQL Server 2000 ODBC native driver [‡]
Teradata V2R5.1	Teradata 3.05 ODBC ^d
Teradata V2R6.0 and later	Teradata 3.06 ODBC ^e
Teradata 12.0.x	Teradata 12.0 ODBC ^f

*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.

^eTeradata ODBC drivers must be obtained separately from Teradata Corporation.

^fTeradata 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

Operating System	Processor	Notes
Windows 2003 SP1 (R2 is also supported)	x86-32 32-bit	
Windows 2003 SP1, Server Enterprise x64 Edition (R2 is also supported)	x86-64 64-bit	Exception: Financial Reporting, Interactive Reporting, and Core Services binaries are 32-bit.

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.

Component	Disk Space (Minimum)	RAM (Minimum)
Financial Reporting	200 MB	1 GB
Interactive Reporting	500 MB	1 GB
Production Reporting	200 MB	256 MB
Web Analysis	1 GB	1 GB

Note:

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

EPM System Software

Required Component	Required For
Shared Services	All Reporting and Analysis components
EPM Workspace	All Reporting and Analysis components

Other Third-Party Software

Required Software	Required For
<ul style="list-style-type: none"> ● One of the following PDF generators: <ul style="list-style-type: none"> ○ Adobe Acrobat Distiller Server 8.0 or 6.0 ○ AFPL Ghostscript 8.54 or 8.51, or GNU Ghostscript 7.0.6 	Financial Reporting*
One of the following: <ul style="list-style-type: none"> ● Microsoft SQL Server (2005 or 2000 SP3a) Analysis Services client—Windows only ● SAP GUI 6.20 OLE DB for OLAP Provider—Windows only ● SAP GUI 6.4 OLE DB for OLAP Provider—Windows only 	Interactive Reporting
One of the following: <ul style="list-style-type: none"> ● NetWeaver BI and SAP BW 7.0 connectivity require the use of SAP JCO 2.1.7 ● For Microsoft SQL Server, you need Microsoft SQL Server (2005 or 2000 SP3a) Analysis Services. The SSAS client and SSAS server versions must match. 	<ul style="list-style-type: none"> ● Financial Reporting ● Production Reporting ● Web Analysis
SQL Grid connectivity (supports SQL Grid with Oracle Database, IBM DB2, and Microsoft SQL Server)—Merant drivers	Web Analysis

*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

Oracle Database 9.2.0.5 - 11g (11.1.0.6.0)*

IBM DB2 8.2 FP4 - 9.1x

Microsoft SQL Server 2000 SP3a - 2005†

*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.

Supported Web Application Servers	Notes
Oracle Application Server 10g (10.1.3.3.x)*	If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.
WebLogic 9.2 (MP1 minimum) – 9.2.x†	
IBM WebSphere 6.1.0.7 – 6.1.0.x‡d	
Apache Tomcat 5.5.17 ^e	

*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.

^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:

- Financial Reporting
- Web Analysis

Supported Web Servers	Supported Application Servers	Notes
Oracle HTTP Server 10g (10.1.3.3.0 and higher)	<ul style="list-style-type: none"> ● Oracle Application Server 	
Apache HTTP Server 2.0.61	<ul style="list-style-type: none"> ● Tomcat ● WebLogic ● WebSphere 	
IBM HTTP Server 6.1	<ul style="list-style-type: none"> ● WebSphere 	
Microsoft IIS 6.0 (on Windows 2003 SP1)	<ul style="list-style-type: none"> ● 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.

Data Sources

Supported Data Source Databases	Reporting and Analysis Modules and Connectivity	Notes
<p>EPM System data sources: one or more of the following:*</p> <ul style="list-style-type: none"> ● Essbase 	<ul style="list-style-type: none"> ● Interactive Reporting—C API / MDX ● Financial Reporting—ADM ● Web Analysis—ADM ● Production Reporting—DDO 	
<ul style="list-style-type: none"> ● Financial Management 	<ul style="list-style-type: none"> ● Financial Reporting—ADM ● Web Analysis—ADM 	<ul style="list-style-type: none"> ● The version of Financial Management ADM must match the version of Financial Management Server.
<ul style="list-style-type: none"> ● Planning 	<ul style="list-style-type: none"> ● Financial Reporting—ADM ● Web Analysis—ADM 	<ul style="list-style-type: none"> ● 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.
<p>Oracle†:</p> <ul style="list-style-type: none"> ● Oracle 11g‡ ● Oracle 10g Release 2 (10.2.0.2) ● Oracle 10g (10.1.0.5) ● Oracle 9i (9.2.0.5) 	<ul style="list-style-type: none"> ● Interactive Reporting—OCI, ODBC ● Production Reporting—OCI, ODBC, JDBC ● Web Analysis—JDBC 	
<p>One of the following:</p> <ul style="list-style-type: none"> ● Microsoft Access 2007 ● Microsoft Access 2003 ● Microsoft Access XP (2002) ● Microsoft Access 2000 	Production Reporting—ODBC	Supported only by Production Reporting—Windows only
IBM DB2 9.1	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC, JDBC, DB2 Connect ● Web Analysis—JDBC 	
IBM DB2 8.2	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC, JDBC, DB2 Connect ● Web Analysis—JDBC 	
IBM DB2 v7x for z/OS	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC, JDBC, DB2 Connect 	<p>Supported only by:</p> <ul style="list-style-type: none"> ● Interactive Reporting ● Production Reporting

Supported Data Source Databases	Reporting and Analysis Modules and Connectivity	Notes
		<ul style="list-style-type: none"> ● Web Analysis
IBM DB2: <ul style="list-style-type: none"> ● IBM DB2 OLAP Server 8.2 ● IBM DB2 OLAP Server 8.1.7a 		Not supported by: <ul style="list-style-type: none"> ● Oracle's Hyperion® Interactive Reporting Studio ● Oracle Hyperion Financial Reporting Studio, Fusion Edition ● Web Analysis
Informix 9.4 and later	Production Reporting—ODBC, JDBC, SDK 2.81	Supported only by Production Reporting
Informix 9.2 and later	Interactive Reporting—ODBC	Supported only by Interactive Reporting
Microsoft SQL Server: <ul style="list-style-type: none"> ● Microsoft SQL Server 2005^d ● Microsoft SQL Server 2000 SP3a 	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC, JDBC ● Web Analysis—JDBC 	
Microsoft SQL Server: ^e <ul style="list-style-type: none"> ● Microsoft SQL Server 2005 Analysis Services^f ● Microsoft SQL Server 2000 SP3a Analysis Services^g 	<ul style="list-style-type: none"> ● Interactive Reporting—ODBO ● Financial Reporting—ADM ● Production Reporting—DDO ● Web Analysis—ADM 	
OpenEdge 10.1B	Production Reporting—ODBC	Supported only by Production Reporting
Progress 9.1E04	Production Reporting—ODBC	Supported only by Production Reporting
Red Brick 6.3 or higher	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC 	Supported only by: <ul style="list-style-type: none"> ● Interactive Reporting—Windows only ● Production Reporting—Windows only
SAP: <ul style="list-style-type: none"> ● SAP BW 3.1 or 3.5 ● NetWeaver BI (SAP BW) 7.0 	<ul style="list-style-type: none"> ● Financial Reporting—BAPI ● Interactive Reporting—ODBO ● Production Reporting—BAPI ● Web Analysis—BAPI 	
SAP R/3 Enterprise (mySAP ERP 2005) 4.6C / 6.x	Production Reporting—BAPI	Supported only by Production Reporting
Sybase 15	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC, JDBC, CTLIB 	Supported only by: <ul style="list-style-type: none"> ● Interactive Reporting ● Production Reporting

Supported Data Source Databases	Reporting and Analysis Modules and Connectivity	Notes
Sybase ASE 12.5.1 and 12.5.2 and later	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC, JDBC, CTLIB ● Web Analysis—JDBC 	Supported only by: <ul style="list-style-type: none"> ● Interactive Reporting ● Production Reporting
Sybase IQ 12.6 and later	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC 	Supported only by: <ul style="list-style-type: none"> ● Interactive Reporting—Windows only ● Production Reporting—Windows only
Teradata (ODBC): ^h <ul style="list-style-type: none"> ● Teradata V12.x (Teradata ODBC driver version 12.0) ● Teradata V2R6.0.x (Teradata ODBC driver version 3.06) ● Teradata V2R5.1.x (Teradata ODBC driver version 3.05) 	<ul style="list-style-type: none"> ● Interactive Reporting—ODBC ● Production Reporting—ODBC, PP2(Solaris, PA-RISC HP-UX) 	Not supported by Financial Reporting
Teradata (JDBC): ⁱ <ul style="list-style-type: none"> ● Teradata V12.x (Teradata JDBC driver version 12.00.00.01) ● Teradata V2R6.0.x (Teradata JDBC driver version 03.01.00.102 or 03.02.00.03) ● Teradata V2R5.1.x (Teradata JDBC driver version 03.01.00.10, 03.03.00.06, or 03.04.00.03) 	<ul style="list-style-type: none"> ● Web Analysis—JDBC 	Not supported by Financial Reporting

*Data sources should be consistent with compatibility matrix. See [Chapter 4, “Release Compatibility”](#)

[†]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.

[‡]Oracle 11g will be supported when it is Generally Available.

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

[¶]Microsoft SQL Server Analysis Services, supported only by Windows-based Reporting and Analysis servers

^{††}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.

^{‡‡}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.

^hObtain the driver separately from the [Teradata](#) web site

ⁱObtain 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

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

*For Financial Management, also install the following DCOM hot fix from Microsoft: <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.

Component	Disk Space (Minimum)	RAM (Minimum)
Financial Management Server	32 GB (10 GB available)	4 GB
Database Server for Financial Management	12 GB	4 GB
Planning	32 GB (10 GB available)	4 GB
Performance Scorecard	2 GB recommended	1 GB*
Strategic Finance Server	250 MB†	2 GB

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

Required Component	Required For
Essbase (Essbase Server and Administration Services components)	<ul style="list-style-type: none"> ● Planning ● Performance Scorecard Server—for custom reporting through cube production
Performance Management Architect	<ul style="list-style-type: none"> ● 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	<p>Optional for use with:</p> <ul style="list-style-type: none"> ● Financial Management ● Planning <p>Required for use with:</p> <ul style="list-style-type: none"> ● Oracle Hyperion Capital Asset Planning, Fusion Edition ● Oracle Hyperion Workforce Planning, Fusion Edition
Shared Services	<ul style="list-style-type: none"> ● Financial Management ● Planning ● Performance Scorecard ● Strategic Finance ● Profitability and Cost Management
EPM Workspace	<ul style="list-style-type: none"> ● 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	Notes
Oracle Database 9.2.0.5 - 11g (11.1.0.6.0)*	For Financial Management, the Oracle Database client must be installed on the same machine as the Financial Management application server.
IBM DB2 8.2 FP4 - 9.1x	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.
Microsoft SQL Server 2000 SP3a - 2005†	

*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	Notes
Oracle Application Server 10g (10.1.3.3.x)*	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

Supported Web Application Servers	Notes
	documented in the <i>Oracle Hyperion Enterprise Performance Management System Manual Deployment Guide</i> . If Oracle Application Server is used as the Web application server, Oracle HTTP Server is also required.
WebLogic 9.2 (MP1 minimum) – 9.2.x [†]	
IBM WebSphere 6.1.0.7 – 6.1.0.x [‡]	
Apache Tomcat 5.5.17 ^d	

*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

Supported Web Servers*	Supported Application Servers	Notes
Oracle HTTP Server 10g (10.1.3.3.0 and higher)	<ul style="list-style-type: none"> ● Oracle Application Server 	Not supported for Financial Management
Apache HTTP Server 2.0.61	<ul style="list-style-type: none"> ● Tomcat ● WebLogic ● WebSphere 	Not supported for Financial Management
IBM HTTP Server 6.1	<ul style="list-style-type: none"> ● WebSphere 	
Microsoft IIS 6.0 (on Windows 2003 SP1)	<ul style="list-style-type: none"> ● 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

Operating System	Processor	Notes
Windows 2003 SP1 (R2 is also supported)	x86-32 32-bit	
Windows 2003 SP1, Server Enterprise x64 Edition (R2 is also supported)	x86-64 64-bit	Supported only for Data Relationship Management, 32-bit binaries only

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.

Component	Disk Space (Minimum)	RAM (Minimum)
Data Integration Management	Refer to the Informatica PowerCenter 8.1.1 installation documentation.	Refer to the Informatica PowerCenter 8.1.1 installation documentation.
FDM Database Server	<ul style="list-style-type: none"> • Dependent on size of the FDM application • Multiple HDDs to spread processing 	1 GB per 75 concurrent users (2 GB minimum)
FDM folder structure	Dependent on size of the FDM application	
FDM Application Server	200 MB	2 GB (per 75 concurrent users)
FDM Web Server	200 MB	2 GB
Data Relationship Management-Database Server	2 GB	2 GB

Component	Disk Space (Minimum)	RAM (Minimum)
Data Relationship Management-Application Server	100 MB	4 GB

EPM System Software

Required Component	Required For
Shared Services	<ul style="list-style-type: none"> ● Data Relationship Management Application Server—For external authentication only ● FDM—For external authentication only
<ul style="list-style-type: none"> ● 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
<ul style="list-style-type: none"> ● Microsoft MDAC 2.8 or later ● Excel 2000 or later 	FDM Application Server. On Windows 2003, MDAC is installed with FDM.
<ul style="list-style-type: none"> ● 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.
<ul style="list-style-type: none"> ● 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: <ul style="list-style-type: none"> ○ 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*	Notes
Oracle Database 9.2.0.5 - 11g (11.1.0.6.0)†	
IBM DB2 8.2 FP4 - 9.1x	Not supported for Data Relationship Management or FDM
Microsoft SQL Server 2000 SP3a – 2005‡	

*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.

4

Release Compatibility

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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.

	Planning 11.1.1*	Financial Management 11.1.1	Performance Scorecard 11.1.1	Strategic Finance 11.1.1	Profitability Management 11.1.1
Essbase - System 9					
Compatible Essbase versions	11.1.1 ← 9.3.x 9.2.x	11.1.1 ← 9.3.x 9.2.x	11.1.1 ← 9.3.x 9.2.x	11.1.1 ← 9.3.x	11.1.1 ←

For example, Planning 11.1.1 is compatible with Essbase versions 11.1.1, 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 11.1.1:

- 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

Shared Services, EPM Workspace, Performance Management Architect, and Smart Space Compatibility

Table 3 Shared Services, EPM Workspace, Performance Management Architect, and Smart Space Release Compatibility

	Shared Services 11.1.1	EPM Workspace 11.1.1*	Performance Management Architect 11.1.1 (includes Calculation Manager)	Smart Space 11.1.1
Essbase				
Compatible Essbase versions	11.1.1 9.3.x 9.2.x	NA	11.1.1 9.3.1	11.1.1 9.3.1
Compatible Administration Services versions	11.1.1 9.3.x 9.2.x	NA	11.1.1 9.3.1	NA
Compatible Provider Services versions	11.1.1 9.3.x 9.2.x	NA	NA	NA
Compatible Integration Services versions	NA	NA	NA	NA
Compatible Essbase Studio versions	11.1.1	NA	11.1.1	NA
Reporting and Analysis				
Compatible Financial Reporting versions	11.1.1	11.1.1	NA	11.1.1 9.3.1
Compatible Production Reporting versions	11.1.1	11.1.1	NA	11.1.1 9.3.1
Compatible Interactive Reporting versions	11.1.1	11.1.1	NA	11.1.1 9.3.1
Compatible Web Analysis versions	11.1.1	11.1.1	NA	11.1.1 9.3.1
Financial Performance Management Applications				
Compatible Planning versions	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	11.1.1 9.3.1†	NA

	Shared Services 11.1.1	EPM Workspace 11.1.1*	Performance Management Architect 11.1.1 (includes Calculation Manager)	Smart Space 11.1.1
Compatible Financial Management versions	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	11.1.1 9.3.1	NA
Compatible Performance Scorecard versions	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x	NA	NA
Compatible Strategic Finance versions	11.1.1 9.3.x 9.2.x	NA	NA	NA
Compatible Profitability and Cost Management versions	11.1.1	11.1.1	11.1.1	NA
Data Management				
Compatible Data Relationship Management versions	11.1.1 9.3.x 9.2.x	NA	All versions through flat files or interface tables	NA
Compatible FDM versions	11.1.1	NA	NA	NA
Compatible Data Integration Management versions	11.1.1 9.3.x 9.2.x	NA	NA	NA

*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 Compatibility with Provider Services

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

Provider Services Version	Smart View Client Version	Supported Product Versions
Provider Services 11.1.1	11.1.1*	Planning 11.1.1 <hr/> Essbase: <ul style="list-style-type: none"> ● 11.1.1 ● 9.3.x

Provider Services Version	Smart View Client Version	Supported Product Versions
		<ul style="list-style-type: none"> 9.2.x

*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

Smart View Client Version	Supported Versions of Independent Providers	Notes
11.1.1	Financial Management: <ul style="list-style-type: none"> 11.1.1 9.3.x 9.2.x 	
11.1.1	Planning: <ul style="list-style-type: none"> 11.1.1 9.3.x 9.2.x 	<ul style="list-style-type: none"> Smart Slice operations and Planning ad hoc operations are supported only when Provider Services Release 11.1.1 is used. See Table 4. 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.
11.1.1	Reporting and Analysis: <ul style="list-style-type: none"> 11.1.1 9.3.x 9.2.x 	

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 6 Essbase Release Compatibility

	Essbase 11.1.1	Administration Services 11.1.1	Integration Services 11.1.1	Provider Services 11.1.1	Essbase Studio 11.1.1
Foundation Services					
Compatible Shared Services versions	11.1.1	11.1.1	NA	11.1.1	11.1.1
Compatible EPM Workspace versions	NA	NA	NA	NA	NA
Compatible Performance Management Architect versions *	11.1.1	NA	NA	NA	11.1.1
Compatible Smart Space versions	11.1.1	NA	NA	NA	NA
Essbase					
Compatible Essbase versions	NA	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	11.1.1
Compatible Administration Services versions	11.1.1 9.3.x 9.2.x	NA	NA	NA	11.1.1
Compatible Provider Services versions	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	NA	NA	11.1.1
Compatible Integration Services versions	11.1.1 9.3.x 9.2.x	NA	NA	NA	11.1.1
Compatible Essbase Studio versions	11.1.1	11.1.1	11.1.1	11.1.1	NA
Reporting and Analysis					
Compatible Financial Reporting versions	11.1.1	NA	NA	NA	NA
Compatible Production Reporting versions	11.1.1	NA	NA	NA	NA

	Essbase 11.1.1	Administration Services 11.1.1	Integration Services 11.1.1	Provider Services 11.1.1	Essbase Studio 11.1.1
Compatible Interactive Reporting versions	11.1.1	NA	NA	NA	NA
Compatible Web Analysis versions	11.1.1	NA	NA	NA	11.1.1

Financial Performance Management Applications

Compatible Planning versions	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	NA	NA	NA
Compatible Financial Management versions	11.1.1 9.3.x 9.2.x	NA	NA	NA	NA
Compatible Performance Scorecard versions	11.1.1 9.3.x 9.2.x	NA	NA	NA	NA
Compatible Strategic Finance versions	11.1.1 9.3.x 9.2.x	NA	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 9.3.x 9.2.x	NA	NA	NA	11.1.1
Compatible Data Integration Management versions	9.3.x 9.2.x	NA	NA	NA	NA

*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

	Interactive Reporting 11.1.1*	Financial Reporting 11.1.1	Production Reporting 11.1.1	Web Analysis 11.1.1
Foundation Services				
Compatible Shared Services versions†	11.1.1	11.1.1	11.1.1	11.1.1
Compatible EPM Workspace versions	11.1.1	11.1.1	11.1.1	11.1.1
Compatible Performance Management Architect versions‡	NA	NA	NA	NA
Compatible Smart Space versions	11.1.1	11.1.1	11.1.1	11.1.1
Essbase				
Compatible Essbase versions	11.1.1	11.1.1	11.1.1	11.1.1
	9.3.x	9.3.x	9.3.x	9.3.x
	9.2.x	9.2.x	9.2.x	9.2.x
Compatible Administration Services versions	NA	NA	NA	NA
Compatible Provider Services versions	NA	11.1.1	NA	11.1.1
		9.3.x		9.3.x
		9.2.x		9.2.x
Compatible Integration Services versions	NA	11.1.1	11.1.1	11.1.1
		9.3.x		9.3.x
		9.2.x		9.2.x
Compatible Essbase Studio versions	11.1.1	11.1.1	11.1.1	11.1.1
Financial Performance Management Applications				
Compatible Planning versions	NA	11.1.1	NA	11.1.1
		9.3.x		9.3.x
		9.2.x		9.2.x

	Interactive Reporting 11.1.1*	Financial Reporting 11.1.1	Production Reporting 11.1.1	Web Analysis 11.1.1
Compatible Financial Management versions	NA	11.1.1 9.3.x 9.2.x	NA	11.1.1 9.3.x 9.2.x
Compatible Performance Scorecard versions	NA	NA	NA	NA
Compatible Strategic Finance versions	NA	NA	NA	NA
Compatible Profitability and Cost Management versions	NA	NA	NA	11.1.1

Data Management

Compatible Data Relationship Management versions	NA	NA	NA	NA
Compatible FDM versions	NA	NA	NA	NA
Compatible Data Integration Management versions	NA	NA	NA	NA

*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

	Interactive Reporting 11.1.1	Interactive Reporting 9.3.x	Interactive Reporting 9.2.x
Oracle's Hyperion® Impact Management Services – Impact of Change	11.1.1	9.3.x	9.2.x
Impact Management Services – Data Model Update	11.1.1	9.3.x	9.2.x
Oracle's Hyperion® Impact Management Services – JavaScript Update Kits	11.1.1	11.1.1 9.3.x	NA
Dashboard Development Services – Dashboard Studio	11.1.1 9.3.x	11.1.1 9.3.x	11.1.1 9.3.x 9.2.x

	Interactive Reporting 11.1.1	Interactive Reporting 9.3.x	Interactive Reporting 9.2.x
Oracle's Hyperion® Dashboard Development Services – Dashboards, Templates, and Components	11.1.1 9.3.x	11.1.1 9.3.x	11.1.1 9.3.x 9.2.x

Financial Performance Management Applications Release Compatibility

Table 9 Financial Performance Management Applications Release Compatibility

	Planning 11.1.1*	Financial Management 11.1.1	Performance Scorecard 11.1.1	Strategic Finance 11.1.1	Profitability and Cost Management 11.1.1
Foundation Services					
Compatible Shared Services versions	11.1.1	11.1.1	11.1.1	11.1.1	11.1.1
Compatible EPM Workspace versions	11.1.1	11.1.1	11.1.1	NA	11.1.1
Compatible Performance Management Architect versions†	11.1.1	11.1.1	NA	NA	11.1.1
Compatible Smart Space versions	NA	NA	NA	NA	NA
Essbase					
Compatible Essbase versions	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x (7.1.2 API)	11.1.1
Compatible Administration Services versions	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	NA	NA	11.1.1
Compatible Provider Services versions	NA	NA	NA	NA	11.1.1

	Planning 11.1.1*	Financial Management 11.1.1	Performance Scorecard 11.1.1	Strategic Finance 11.1.1	Profitability and Cost Management 11.1.1
Compatible Integration Services versions	NA	NA	NA	NA	11.1.1
Compatible Essbase Studio versions	NA	NA	NA	NA	NA
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
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	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	NA	NA	NA	NA	NA

	Planning 11.1.1*	Financial Management 11.1.1	Performance Scorecard 11.1.1	Strategic Finance 11.1.1	Profitability and Cost Management 11.1.1
Cost Management versions					
Data Management					
Compatible Data Relationship Management versions	All versions through flat files	All versions through flat files	NA	NA	NA
Compatible FDM versions	The version deployed with Essbase	11.1.1 9.3.x 9.2.x	NA	11.1.1	NA
Compatible Data Integration Management versions	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x	NA	NA

*Includes Oracle Hyperion Workforce Planning, Fusion Edition and Capital Expense Planning

†Includes Calculation Manager

Data Management Release Compatibility

Table 10 Data Management Release Compatibility

	Data Relationship Management 11.1.1	FDM 11.1.1	Oracle's Hyperion® Data Integration Management 11.1.1
Foundation Services			
Compatible Shared Services versions	11.1.1*	11.1.1	NA
Compatible EPM Workspace versions	NA	NA	NA
Compatible Oracle Hyperion Smart View for Office, Fusion Edition versions	NA	NA	NA
Compatible Performance Management Architect versions†	All versions via flat files or interface tables	NA	NA
Compatible Smart Space versions	NA	NA	NA
Essbase			

	Data Relationship Management 11.1.1	FDM 11.1.1	Oracle's Hyperion® Data Integration Management 11.1.1
Compatible Essbase versions	All versions through flat files	11.1.1 9.3.x 9.2.x (7.1.2 API)	11.1.1 9.3.x 9.2.x 7.1.6
Compatible Administration Services versions	All versions through flat files or interface tables	NA	NA
Compatible Oracle Hyperion Provider Services versions	NA	NA	NA
Compatible Integration Services versions	All versions through flat files or interface tables	NA	NA
Compatible Essbase Studio versions	NA	11.1.1	NA

Financial Performance Management Applications

Compatible Planning versions	All versions through flat files	The version deployed with Essbase	11.1.1 9.3.x 9.2.0.3
Compatible Financial Management versions	All versions through flat files	11.1.1 9.3.x 9.2.x	11.1.1 9.3.x 9.2.0.3
Compatible Performance Scorecard versions	NA	NA	11.1.1 9.3.x
Compatible Strategic Finance versions	NA	11.1.1	NA
Compatible Profitability and Cost Management versions	NA	NA	NA

*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

5

Installation Planning Checklist

In This Chapter

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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

Task	Comments	Check When Completed
Preparing the work area		
Prepare a work area for consultants who are assisting with the installation.	<ul style="list-style-type: none">● Internet access—a direct connection outside the firewall● Work area and computer (ideally located where the servers on which you are installing EPM System products are located), with network access● Telephone	
Ensure that you can access the Oracle® E-Delivery (http://edelivery.oracle.com/) site.		
Obtaining third-party licenses		
Obtain required third-party license keys.	<p>Some third-party products require license keys or license files. Requesting and receiving a license key can require several days.</p> <p>For Web application servers, consider which type of license works best for your organization. For example, you might not</p>	

Task	Comments	Check When Completed
	need a license for the highest level of functionality; a license for a lower level of functionality might meet your needs.	
Preparing the software		
Download the EPM System Installer and the required product installation assemblies from the media packs for the products that you purchased.	<p>Download from the Oracle® E-Delivery (http://edelivery.oracle.com/) site.</p> <p>Review the Media Pack Readme on Oracle® E-Delivery to identify the products that are required and optional for use with your products.</p> <p>See the <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</i> for information about how to unzip and organize the files.</p>	
Ensure that the products meet EPM System product release compatibility requirements.	See Chapter 4, “Release Compatibility.”	
Install all third-party components that are required by EPM System products.	<p>See Chapter 3, “System Requirements.”</p> <p>Ensure that you have obtained all licenses that are required by third-party software.</p>	
Validate that all third-party product versions meet system requirements.	See Chapter 3, “System Requirements.”	
Gathering required documentation		
Download the EPM System installation and product documentation for the products that you purchased.	<p>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:</p> <ul style="list-style-type: none"> ● <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</i> ● <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i> ● <i>Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide</i>, if you are using SSL ● <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Troubleshooting Guide</i> 	

Task	Comments	Check When Completed
	<ul style="list-style-type: none"> ● Other installation and deployment documentation required for your deployment. (See Chapter 1, “Installation Documentation Roadmap.”) ● The documentation for the products that you are installing 	
Preparing the hardware		
Plan your deployment architecture.	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 <i>Oracle Hyperion Enterprise Performance Management System High Availability Guide</i> if you plan to deploy in a clustered environment.	
Ensure that the necessary hardware is available for your deployment architecture, and verify that the computers meet system requirements.	For assistance in planning your deployment architecture, see Chapter 2, “EPM System Product Deployment.” For system requirements, see Chapter 3, “System Requirements.”	
Prepare each server for the EPM System installation.	<ul style="list-style-type: none"> ● Update server software as needed. For example, ensure that required service packs, hotfixes, and so on are installed. ● Disable unnecessary services. 	
If you are clustering for load-balancing or failover, ensure that IT prepares the load balancer (hardware, software) or the failover mechanism.	Ensure that the load balancer or failover mechanism is tested and ready before you start the installation. See the <i>Oracle Hyperion Enterprise Performance Management System High Availability Guide</i> for additional information.	
Check network bandwidth and latency for distant sites and ensure that minimum requirements are met.		
Synchronize server time.	When servers are not time synchronized, authentication errors that result in user access problems can occur between the EPM System application servers.	
Arrange backup functionality.	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.	

Task	Comments	Check When Completed
Resolve potential firewall problems.	<p>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.</p> <p>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.</p>	
Preparing databases		
<p>If necessary, install a database client and prepare a database for EPM System products that require a repository for relational storage.</p>	<ul style="list-style-type: none"> ● 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 <code>TNSping</code> command. <p>If the database is installed, perform a full backup.</p> <p>For additional information about preparing databases, see “Preparing a Database” on page 71.</p>	
Preparing the security infrastructure		
<p>Collect the information needed to configure external security user directories in Oracle's Hyperion® Shared Services Console.</p>	<p>See “Configuring User Directories” in the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i>.</p> <p>Upgrade Note!</p> <p>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 <i>Oracle Hyperion Enterprise Performance</i></p>	

Task	Comments	Check When Completed
	<i>Management System Security Administration Guide.</i>	
For each server, prepare a user account with Administrator rights. Install as an administrator and as the same user for all EPM System products.	<p>Windows:</p> <ul style="list-style-type: none"> ● 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.” 	
Create domain accounts.	<ul style="list-style-type: none"> ● 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 	
Obtain an account for external authentication with access to the user directory.	<ul style="list-style-type: none"> ● 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. <p>See the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i>.</p>	
If you are using secure communication, ensure availability of SSL certificates for all components.	<p>See the <i>Oracle Hyperion Enterprise Performance Management System SSL Configuration Guide</i>.</p> <p>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.</p>	
Open firewall ports and if needed, fix dynamic ports.	See Chapter 6, “Ports.”	

Task	Comments	Check When Completed
<p>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.</p>	<p>See the <i>Oracle Hyperion Enterprise Performance Management System Security Administration Guide</i>.</p>	
<p>Setting up Web application servers and Web servers</p>		
<p>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.</p>	<ul style="list-style-type: none"> ● 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. 	
<p>Install a Web server to use with the EPM System products that require a Web server.</p>	<p>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.</p> <p>A default installation provides a Web server for the Embedded Java Container.</p>	
<p>If you are using software load balancing, in the Web server, prepare the load balancer plug-in to the Web application server.</p>		
<p>Resolving ports</p>		
<p>Identify and resolve port conflicts.</p>	<p>Review the list of EPM System product default ports in Chapter 6, “Ports.”</p>	
<p>Preparing for product configuration</p>		
<p>Collect the information needed to configure products after installation.</p>	<p>See “Configuring EPM System Products” in the <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</i></p>	
<p>Review your license agreement to confirm which products you have purchased and are licensed to use.</p>	<p>During configuration, based on your license agreement, activate or deactivate features. See “License Compliance” in the <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</i>.</p>	

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.

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

Product	Sizing Guideline
EPM Workspace	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.
Performance Management Architect	Oracle recommends starting with at least 250MB.
Smart Space	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.
Administration Services	The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Essbase Studio	The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Planning and Calculation Manager	<ul style="list-style-type: none"> ● 100 MB for applications with 5,000 or fewer total members ● 200 MB for applications with 15,000 or fewer total members <p>Note: You can adjust the size of the system table database to match the size of the application.</p>
Financial Management and Calculation Manager	<ul style="list-style-type: none"> ● 100 MB for applications with 5,000 or fewer total members ● 200 MB for applications with 15,000 or fewer total members <p>Note: You can adjust the size of the system table database to match the size of the application.</p>
Performance Scorecard	500 MB
Profitability and Cost Management	100 MB
FDM	See the <i>Oracle Hyperion Financial Data Quality Management DBA Guide</i> .

Oracle Database Configuration Considerations

Tablespace Considerations

Product	Tablespace Considerations
General – All products	<ul style="list-style-type: none"> ● 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.

Product	Tablespace Considerations
	<ul style="list-style-type: none"> ● 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 <i>Oracle Hyperion Financial Data Quality Management DBA Guide</i> .

Other Parameters

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

Product	Other Parameters
General/All Products	Set the nls_length_semantics parameter to char: <code>nls_length_semantics=char</code>
Shared Services	For Shared Services to work correctly, set the following parameters: <code>nls_language = American</code> <code>nls_territory = America</code>
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 <i>Oracle Hyperion Financial Data Quality Management DBA Guide</i> .

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

Product	Sizing Guideline
Shared Services	Start with 100MB, and add more as the number of migrations with Lifecycle Management and the number of audit records increases.
EPM Workspace	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.
Performance Management Architect	Oracle recommends starting with at least 250MB.
Smart Space	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.
Administration Services	The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Essbase Studio	The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Planning and Calculation Manager	<ul style="list-style-type: none">● 100 MB for applications with 5,000 or fewer total members● 200 MB for applications with 15,000 or fewer total members <p>Note: You can adjust the size of the system table database to match the size of the application.</p>
Financial Management and Calculation Manager	<ul style="list-style-type: none">● 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
	Note: You can adjust the size of the system table database to match the size of the application.
Performance Scorecard	500 MB
Oracle Hyperion Profitability and Cost Management, Fusion Edition	100 MB
FDM	See the <i>Oracle Hyperion Financial Data Quality Management DBA Guide</i> .

Microsoft SQL Server Database Configuration Considerations

Product	Tablespace Considerations
Reporting and Analysis	The default tablespace for the database user who owns the Reporting and Analysis repository must not be partitioned.

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

Product	Sizing Guideline
Shared Services	Start with 100MB, and add more as the number of migrations with Lifecycle Management and the number of audit records increases.
EPM Workspace	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.
Performance Management Architect	Oracle recommends starting with at least 250MB.
Oracle Smart Space, Fusion Edition	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.
Oracle Essbase Administration Services	The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Essbase Studio	The amount of space needed depends on the metadata created; Oracle recommends starting with at least 32 MB.
Planning and Calculation Manager	<ul style="list-style-type: none"> ● 100 MB for applications with 5,000 or fewer total members ● 200 MB for applications with 15,000 or fewer total members <p>Note: You can adjust the size of the system table database to match the size of the application.</p>

Product	Sizing Guideline
Financial Management and Hyperion Calculation Manager	<ul style="list-style-type: none"> ● 100 MB for applications with 5,000 or fewer total members ● 200 MB for applications with 15,000 or fewer total members <p>Note: You can adjust the size of the system table database to match the size of the application.</p>
Performance Scorecard	500 MB

IBM DB2 Database Configuration Considerations

Product	Tablespace Considerations
General – All products	<p>Minimum tablespace requirements:</p> <ul style="list-style-type: none"> ● A bufferpool and a tablespace with a 32 KB pagesize ● A system temporary bufferpool and a system temporary tablespace with a 32 KB pagesize <p>Note: The default tablespace for the database user that owns the repository must not be partitioned.</p> <p>Increase settings as follows:</p> <ul style="list-style-type: none"> ● <i>bufferpool_name</i> bufferpool from 1000 (default) to 32000 (about the size of the largest audit table and indexes) ● IBMDEFAULTBP bufferpool from 1000 (default) to 100000 ● <i>tmp_bufferpool_name</i> 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	<ul style="list-style-type: none"> ● Increase the heap size as follows: <ul style="list-style-type: none"> ○ <i>drda_heap_sz</i> parameter – 2048 or higher ○ <i>stmtheap</i>, <i>applheapsz</i>, and <i>app_ctl_heap_sz</i> parameters – 8096 ● Increase <i>PAGESIZE</i> to 32K. ● Increase <i>bufferpool</i> to 32768.
Performance Management Architect	<ul style="list-style-type: none"> ● Increase the heap size as follows: <ul style="list-style-type: none"> ○ <i>APP_CTL_HEAP_SZ</i> to 8096 ○ <i>APPLHEAPSZ</i> to 8192 ● Ensure that the user has privileges to create tablespaces and buffer pools.
Planning	<p>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.</p>

Product	Tablespace Considerations
	<p>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 <i>HSPSPACE8_1</i> and is created in the <i>C:\DB2DATA\HSPSPACE8_1</i> directory. The other settings are also defaults; the administrator should adjust the settings as appropriate for the environment.</p> <p>Example:</p> <pre>CREATE BUFFERPOOL hspool8_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;</pre> <p>The database administrator must make sure that the user who logs on to the Planning relational database has rights to use the new tablespace.</p>

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:

```
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
```

```
TRANSFERRATE 0.9 BUFFERPOOL HPS_BP DB2 COMMENT ON TABLESPACE HPS_TEMP IS  
'HPS Temporary Table Space'  
DB2 TERMINATE  
DB2STOP  
DB2
```

- 3 Save the file as *name.bat*.
- 4 From the Command Center, execute the script.
- 5 **Windows 2003 users:** Perform these steps:
 - a. Select Control Panel > Computer Management > Users and Groups.
 - 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*.

During configuration with EPM System Configurator, for the Web application server deployment task, use the Advanced Set up feature to configure access using a logical address. See "Application Server Deployment: Oracle AS" in the *Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide* and the *Oracle Hyperion Enterprise Performance Management System Manual Deployment 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>), 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 `WEBLOGIC_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:
 - Enable JavaScript.
 - Enable cookies. The preferred setting is to allow cookies to be stored on your computer. The minimum requirement is to allow per-session level cookies.
 - Allow pop-up windows.

- 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.”

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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

Port Type	Default Port Number	Where Configurable
Listen port	28080	EPM System Configurator
SSL listen port	28443	EPM System Configurator
Shutdown Port for embedded Java container	28081	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / <i>SharedServices9/conf/server.xml</i> For parameters, see the application server documentation.
AJP connector port	28082	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / <i>SharedServices9/conf/server.xml</i> For parameters, see the application server documentation.

Table 13 Shared Services Default Service Ports

Service	Default Port Number	Where Configurable
Remote Authentication Module	28000	Oracle's Hyperion® Remote Authentication Module installation program
	Additional dynamic port (1)	Not configurable
OpenLDAP	28089	<ul style="list-style-type: none"> Windows: Edit the Windows Registry – HKEY_LOCAL_MACHINE/SOFTWARE/OpenLDAP/Parameters/Urls
Oracle Internet Directory (if used as Oracle's Hyperion® Shared Services Native Directory)	389 636 (SSL)	See the Oracle Internet Directory documentation.

EPM Workspace Ports

Table 14 EPM Workspace Default Service Ports

Service	Default Port Number	Where Configurable
Foundation ports: <ul style="list-style-type: none"> Global Services Manager (GSM) Core Service Service Broker Job Service Event Service Repository Service 	6800 - 6810 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.	<ul style="list-style-type: none"> EPM System Configurator Configuration and Monitoring Console
Annotation Service	8199	Configuration and Monitoring Console

Table 15 EPM Workspace Web Server Port

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

Table 16 EPM Workspace Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	45000	EPM System Configurator
Additional listen port (1)	Dynamic	Not configurable

Port Type	Default Port Number	Where Configurable
SSL listen port	45043	EPM System Configurator
Shutdown port for embedded Java container	45001	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> /Workspace/ conf/server.xml For parameters, see the application server documentation.
AJP connector port	45002	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> /Workspace/ conf/server.xml For parameters, see the application server documentation.

Configuration and Monitoring Console Ports

Table 17 Configuration and Monitoring Console Ports

Port Type	Default Port Number	Where Configurable
Configuration and Monitoring Console UI	55000	<i>HYPERION_HOME</i> /common/ workspacert/9.5.0.0/ui/conf/ server.xml
Configuration and Monitoring Console Agent	6860	Configuration and Monitoring Console

Performance Management Architect Ports

Table 18 Performance Management Architect Web Application Ports

Port Type	Default Port Number	Where Configurable
Performance Management Architect UI		
Listen port	19091 (can be configured for SSL)	EPM System Configurator
SSL listen port	19143	EPM System Configurator
Shutdown port for embedded Java container	19092	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / EPMAWebServer/conf/ server.xml For parameters, see the application server documentation.
AJP connector port	19093	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / EPMAWebServer/conf/ server.xml

Port Type	Default Port Number	Where Configurable
		For parameters, see the application server documentation.
Data Synchronizer Web Service (Performance Management Architect)		
Listen port	19101 (can be configured for SSL)	EPM System Configurator
SSL listen port	19043	EPM System Configurator
Shutdown port for embedded Java container	19102	<i>HYPERION_HOME</i> /deployments/ AppServNameAndVersion/ EPMADataSynchronizer/conf/ server.xml For parameters, see the application server documentation.
AJP connector port	19103	<i>HYPERION_HOME</i> /deployments/ AppServNameAndVersion/ EPMADataSynchronizer/conf/ server.xml For parameters, see the application server documentation.

Table 19 Performance Management Architect Dimension Server Default Service Ports

Services	Default Port Number	Where Configurable
Server Manager	5250	<i>HYPERION_HOME</i> /products/Foundation/BPMA/ AppServer/DimensionServer/ServerEngine/bin/ BPMA_Server_Config.xml <ServerManagerPort>portNumber</ ServerManagerPort>
Process Manager	5251	<i>HYPERION_HOME</i> /products/Foundation/BPMA/ AppServer/DimensionServer/ServerEngine/bin/ BPMA_Server_Config.xml <Port>portNumber</Port> web.config file under the webservices directory <appSettings> parameter <add key="ProcessManagerPort" value="portNumber" / >
Event Subscription	5252	<i>HYPERION_HOME</i> /products/Foundation/BPMA/ AppServer/DimensionServer/ServerEngine/bin/ BPMA_Server_Config.xml <EventSubscriptionPort>portNumber</ EventSubscriptionPort>
Event Manager	5253	<i>HYPERION_HOME</i> /products/Foundation/BPMA/ AppServer/DimensionServer/ServerEngine/bin/ BPMA_Server_Config.xml

Services	Default Port Number	Where Configurable
		<EventManagerPort>portNumber</EventManagerPort>
Job Manager	5254	<i>HYPERION_HOME</i> /products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/BPMA_Server_Config.xml <JobManagerPort>portNumber</JobManagerPort>
Engine instances	5100-5140	<i>HYPERION_HOME</i> /products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/BPMA_Server_Config.xml <MinEnginePort>portNumber</MinEnginePort> <MaxEnginePort>portNumber</MaxEnginePort>
Net JNI Bridge	5255	<i>HYPERION_HOME</i> /products/Foundation/BPMA/AppServer/DimensionServer/ServerEngine/bin/BPMA_Server_Config.xml <NetJNIBridgePort>portNumber</NetJNIBridgePort>

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 20 Performance Management Architect Web Server Port

Default Web Server Port	Where Configurable
80	Microsoft Internet Information Services (IIS) Manager Console. Change the TCP port value setting.

Calculation Manager Web Application Ports

Table 21 Calculation Manager Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	8500	EPM System Configurator
Shutdown port	8501	<i>HYPERION_HOME</i> /deployments/AppServNameAndVersion/calcmgr/conf/server.xml

Port Type	Default Port Number	Where Configurable
		For parameters, see the application server documentation.
AJP connector port	8502	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / calcmgr/conf/server.xml For parameters, see the application server documentation.

Smart Space Ports

Type of Port	Default Port Number	Where Configurable
Smart Space Collaborator Client	5222	EPM System Configurator
Smart Space Collaborator Admin Console	17086	EPM System Configurator
Oracle Smart Space Collaborator, Fusion Edition Secure Admin Console	17096	EPM System Configurator
Web application listen port	17080	EPM System Configurator
Web application SSL listen port	17090	EPM System Configurator
Web application shutdown port	17081	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / SmartSpaceWebServices/conf/ server.xml For parameters, see the application server documentation.
Web application AJP connector port	17082	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / SmartSpaceWebServices/conf/ server.xml 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

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

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

Port Type	Default Port Number	Where Configurable
Listen port	10080	EPM System Configurator
SSL listen port	10083	EPM System Configurator
Shutdown port for embedded Java container	10081	<i>HYPERION_HOME/deployments/AppServNameAndVersion/eas/conf/server.xml</i> For parameters, see the application server documentation.
AJP connector port	10082	<i>HYPERION_HOME/deployments/AppServNameAndVersion/eas/conf/server.xml</i> For parameters, see the application server documentation.

Provider Services Ports

Table 24 Provider Services Web Application Ports

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

Smart Search Ports

Table 25 Smart Search Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	16080	EPM System Configurator
SSL listen port	16843	EPM System Configurator
Shutdown port for embedded Java container	16081	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / SmartSearch/conf/server.xml For parameters, see the application server documentation.
AJP connector port	16082	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / SmartSearch/conf/server.xml For parameters, see the application server documentation.

Essbase Studio Ports

Table 26 Essbase Studio Ports

Port Type	Default Port Number	Where Configurable
Listen port	3000	<i>HYPERION_HOME</i> /products/Essbase/EssbaseStudio/Server/server.properties transport.port=new port number
HTTP listen port	9080	<i>HYPERION_HOME</i> /products/Essbase/EssbaseStudio/Server/server.properties Server.httpPort=new port number

Application Builder for .NET Ports

Table 27 Application Builder for .NET Web Application Ports

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

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

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

Table 29 Financial Reporting Default Service Ports

Service	Default Port Number	Where Configurable
Financial Reporting Report Service	Dynamic (2)	<i>HYPERION_HOME</i> /products/biplus/ lib/fr_repserver.properties Parameters: HRRepSvrPort1, HRRepSvrPort2
Financial Reporting Scheduler Service	Dynamic	<i>HYPERION_HOME</i> /products/biplus/ lib/fr_scheduler.properties Parameter: HRSchdSvrPort
Financial Reporting Print Service	Dynamic	<i>HYPERION_HOME</i> /products/biplus/ lib/fr_printserver.properties Parameter: HRPrintSvrPort
Oracle Hyperion Financial Reporting, Fusion Edition Communication Service	8299	<i>HYPERION_HOME</i> /products/biplus/ lib/fr_global.properties Parameter: RMIPort
Remote ADM Server port for Planning datasource access	Dynamic	<i>HYPERION_HOME</i> /common/ADM/ <i>VERSION</i> /lib/ADM.properties file on the Report Server machine Parameter: ADM_RMI_SERVER_PORT

Interactive Reporting Ports

Table 30 Interactive Reporting Default Service Ports

Service	Default Port Number	Where Configurable
<ul style="list-style-type: none"> • Data Access Service (DAS) • Oracle's Hyperion® Interactive Reporting Service • Logging Service 	<p>6810 - 6816</p> <p>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.</p> <p>To identify which port was assigned to each service, use the Configuration and Monitoring Console.</p>	<ul style="list-style-type: none"> • EPM System Configurator • Configuration and Monitoring Console

Web Analysis Ports

Table 31 Web Analysis Web Application Ports

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

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](#)

- “Profitability and Cost Management Ports” on page 99

Financial Management Ports

Table 32 Financial Management Default Service Port

Service	Default Port Number	Where Configurable
Oracle Hyperion Financial Management, Fusion Edition Application Server	135-plus ephemeral high-range ports (1024-65536)	Windows settings—Fix DCOM ephemeral ports. See the Microsoft support article describing how to set the ports used by DCOM: http://support.microsoft.com . Search for "restrict DCOM port."

Table 33 Financial Management Web Server Port

Default Web Server Port	Where Configurable
80 (HTTP) or 443 (when SSL is enabled)	In Microsoft Internet Information Services (IIS) Manager Console, change the TCP port value setting.

Planning Ports

Table 34 Planning Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	8300	EPM System Configurator
Additional listen port (1)	Dynamic	Not configurable
SSL listen port	8343	EPM System Configurator
Shutdown port for embedded Java container	8301	<i>HYPERTON_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / <i>HyperionPlanning/conf/server.xml</i> For parameters, see the application server documentation.
AJP connector port	8302	<i>HYPERTON_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / <i>HyperionPlanning/conf/server.xml</i> For parameters, see the application server documentation.

Table 35 Planning Default Service Port

Service	Default Port Number	Where Configurable
Planning RMI Server	11333	<p><i>HYPERION_HOME</i>/common/RMI/VersionNumber/HyperionRMI_Port.properties</p> <p>Parameter: registryPort</p> <p>Note: For information about additional requirements when changing Oracle Hyperion Planning, Fusion Edition ports, see “Reconfiguring EPM System Products” in <i>Oracle Hyperion Enterprise Performance Management System Installation and Configuration Guide</i>.</p>

Performance Scorecard Ports

Table 36 Performance Scorecard Web Application Ports

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

Table 37 Performance Scorecard Alerter Web Application Ports

Port Type	Default Port Number	Where Configurable
Listen port	18090	EPM System Configurator
SSL listen port	18444	EPM System Configurator
Shutdown port for embedded Java container	18091	<p><i>HYPERION_HOME</i>/deployments/AppServNameAndVersion/HPSAlerter/conf/server.xml</p> <p>For parameters, see the application server documentation.</p>
AJP connector port	18092	<p><i>HYPERION_HOME</i>/deployments/AppServNameAndVersion/HPSAlerter/conf/server.xml</p>

Port Type	Default Port Number	Where Configurable
		For parameters, see the application server documentation.

Profitability and Cost Management Ports

Table 38 Profitability and Cost Management Default Ports

Type of Port	Default Port Number	Where Configurable
Listen port	6756	EPM System Configurator
Additional listen port	Dynamic	Not configurable
SSL listen port	6743	Oracle's Hyperion Enterprise Performance Management System Configurator
Shutdown port for embedded Java container	6757	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / Profitability/conf/server.xml For parameters, see the application server documentation.
AJP connector port	6758	<i>HYPERION_HOME</i> /deployments/ <i>AppServNameAndVersion</i> / Profitability/conf/server.xml For parameters, see the application server documentation.

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://

Service	Default Port Number	Where Configurable
		support.microsoft.com. Search for "restrict DCOM port."
File sharing	137-139, 445	Controlled by the operating system. By default, file sharing is enabled between all FDMapplication servers and the data server. Default port numbers are the following: <ul style="list-style-type: none"> ● NetBIOS Datagram Service = port 138 ● NetBIOS Name Resolution = port 137 ● NetBIOS Session Service = port 139 If NetBIOS is turned OFF, then use SMB = port 445
Firewall	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://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

Default Web Server Port	Where Configurable
80 (HTTP) or 443 (HTTPS)	Microsoft Internet Information Services (IIS) Manager Console. (Change the TCP port value setting.)

Data Relationship Management Ports

Table 41 Data Relationship Management Default Service Port

Service	Default Port Number	Where Configurable
Oracle Hyperion Data Relationship Management, Fusion Edition	135-plus ephemeral high-range ports (1024-65536)	<ul style="list-style-type: none"> ● config.xml using the Data Relationship Management Console ● Windows settings—Fix DCOM ephemeral ports. For more information, see the Microsoft support article describing

Service	Default Port Number	Where Configurable
		how to set the ports used by DCOM: http://support.microsoft.com . Search for "restrict DCOM port."

Table 42 Data Relationship Management Web Server Ports

Default Web Server Ports	Where Configurable
80 (HTTP)	Microsoft Internet Information Services (IIS) Manager Console. (Change the TCP port value setting.)
443 (HTTPS)	

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