

Hyperion®
Financial Management – System 9
Release 9.2.1
Readme

Readme File

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Purpose

This document includes important, late-breaking information about this release. Review this information thoroughly before installing Financial Management Release 9.2.1.

Supported Languages

Financial Management 9.2.1 supports these languages:

- French
 - German
 - Spanish
 - Russian
 - Japanese
 - Korean
 - Simplified Chinese
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New Features

Oracle Essbase Analytics Link for Hyperion Financial Management

Oracle Essbase Analytics Link for Hyperion Financial Management provides near real-time data synchronization between Oracle Hyperion Financial Management and Oracle Essbase, enabling Essbase users to view live Financial Management data without having to create and manage extraction and load tasks. Analytics Link off-loads the Financial Management application server by managing all reporting requests, freeing resources for financial consolidations.

Installation Updates

Financial Management Release 9.2.1 is a full installation. There are updates to the client, server, and Web tiers, and the release must be installed on all three tiers. For installation instructions, see the *Financial Management Installation Guide*.

Hyperion recommends all customers using Financial Management 9.2.x install 9.2.1.

Before you install Financial Management:

Stop all Resources, Services and Processes running Financial Management:

- a. Financial Management Application Server:
 - Service/Process: HsxService.exe
 - Processes: HsxServer.exe, HsvDataSource.exe, and CASSecurity.exe
- b. Financial Management Web Server:
 - Service/Processes: HFMWebServiceManager.exe
- c. Financial Management Client
 - Processes: HFM.exe

Smart View Configuration Using Auto-Deployment

If you have Release 9.2 SP2 or SP3 installed, you must uninstall Smart View and download Smart View 9.2.1.

Place the Smart View files in this directory:

<Hyperion_Home>\FinancialManagement\Web\HFMOfficeProvider\

1. Rename the `hsv.exe` file to `SmartView.exe`.
2. Overwrite the `version.xml` file that is currently in your directory.

To enable Auto Deployment on the HFM Web server:

1. Open the Financial Management Configuration Utility.
2. Click the **Smart View for Office Services** tab.
3. Select **Always warn when client version is newer**.

On the Client machines:

1. Connect to the HFM Office provider.
2. At the prompt to install the new version, select **Install Now**.
3. Download the installation.
4. Close Excel and run the installation (on Citrix, make sure to install for all users).

Hyperion License Compliance

Beginning with this release, Hyperion® License Server™ and standalone license files are not used for license management. Instead, administrators need to audit product use.

Administrators need to audit product use for all products, even products that did not previously require a license server or standalone license file. If you are updating a product that previously used a license server or standalone license file, to ensure compliance with your license agreement, you also need to edit a properties file to activate or deactivate features in accordance with what you have purchased.

For more information about license compliance, see the *Hyperion License Compliance Readme* ([hyp_license_compliance_readme_921.pdf](#)), which you can find on the Oracle® [E-Delivery](#) site or the product DVD.

Note that references to Hyperion License Server may still exist in some of the documentation, and on some installer panels.

Supported Upgrade Paths

Financial Management supports upgrades from release 3.5.1 and all subsequent releases.

Release 9.2.1 Product Name Changes

The user interface in Oracle's Hyperion products has been rebranded for Release 9.2.1 to incorporate a new logo, new copyright and trademark information, and new product names. Products referred to in this Readme and in the Installation Guide also reflect the current product names. However, because the core documentation for Release 9.2.1 has not been updated, products are still referred to by their previous names in the documentation.

Known Issues

Configuration Utility

- After installing release 9.2.1, if an error message occurs during HFM configuration, cancel the configuration, reboot the server, and configure HFM.
- Cluster names that are defined in the Financial Management Configuration Utility cannot contain double-byte foreign characters.

Extended Analytics

- Financial Management may experience problems with Extended Analytics if a label contains a single quotation mark ('). See the *Financial Management Administrator's Guide* for the available "Extended Analytics Registry Settings".
The recommended workaround is to add the following two registry entries and rerun the Extended Analytics task- no server restart is required.
 - KEY_LOCAL_MACHINE\SOFTWARE\Hyperion Solutions\Hyperion Financial Management\Server
"EAUseODBC"= dword:00000000
"EAUseSQLBinding"= dword:00000001

Language Selection

- The menu language selection option has been removed from the main logon screen. You select the menu language from your Web browser, for example, Options > Languages.

Localization

References to Hyperion License Server may still exist in some of the localized installer panels.

Oracle Databases

- The following database settings are recommended when using Oracle databases with Financial Management:
 - OPEN_CURSORS= 5000 - needed to allow for larger transactions (as well as ODBC support)
 - PROCESSES= (whatever is needed to support the expected number of applications and application servers), based on numbers derived from the Financial Management Installation guide section titled “Database Connection Pooling”.
- To improve performance in Oracle, the DBA should run statistics on the ICTTransactions table. There are a variety of utilities and commands available to perform this task. Following is a sample of one of the commands that you can use: `ANALYZE TABLE APPNAME_ICT_TRANSACTIONS COMPUTE STATISTICS`
- When using Oracle Provider for OLE DB, the virtual and private memory of the Financial Management application process, `HsvDataSource.exe`, continues to increase over time. To resolve the high memory usage, enable Statement Caching, but set the configured value to a low setting. The recommended value is between 1 and 10.
Edit the following registry value:
`Hkey_Local_Machine\Software\Oracle\Key_Homename\Oledb`
Value Name: `StmtCacheSize`
Value (decimal): 1
Where `Key_Homename` refers to the appropriate Oracle Home.
Stop and restart the HFM application processes.

Process Control

- Process Control may become unstable during paging when very large pages sizes are set.
- An entity should not be locked until all phases have been published.
- Validation accounts should always be assigned to a submission group. Submission group 0 should be assigned to validation accounts that will not be subject to process management.
- Under certain circumstances, the Process Control module may show an improper No Access status for phases that are in First Pass.

Schema Upgrade

When upgrading from a 3.5.x application, the user ID for the Application Owner will need to be manually provisioned to the application after executing the Schema Upgrade. You must reprovision the user ID of the prior Application Owner as an Application Administrator using Shared Services Global Administration. This is the only user ID that will need to be manually added to the application.

Security

- When using a double-byte operating system, the Security Role report can only be viewed.
- Unable to assign Security Classes within Shared Services when Firefox is used as the browser. Use Internet Explorer when assigning security within Shared Services.

Using Microsoft Windows 2003 SP2

In some Windows 2003 SP2 installations, clients may experience “Access Denied” issues while connecting from Financial Management or Financial Reporting. The client machine event log will display a “General access denied error”. To resolve this, add the following Dword value if it does not already exist:

1. In the Registry Editor, under
HKEY_LOCAL_MACHINE\SOFTWARE\Policies\Microsoft\Windows NT\Rpc, add a new
DWORD value with the name **Server2003NegotiateDisable**.
2. Right-click **Server2003NegotiateDisable** and click **Modify**.
3. For the Value Data, type **1**, and click **OK**.

Note: This setting disables the bind time negotiation and multiple transfer syntax negotiation.

4. Exit the Registry Editor and restart the computer.

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Hardware and Software Requirements

Following are the hardware and software requirements for each tier, as well as a brief overview on the processes that occur on each tier.

The Client

Every object within Financial Management employs an architecture that enables “Thin Clients”. There are no processing or business rules that occur on the client, and in all cases the traffic between the application servers and the clients is minimized. The client is offered through Web servers or through a Win32 client installed on the local machine.

The exception to the client machine recommendation below is for Graphical Metadata Management that requires an Admin type of machine as defined below.

Supported Client Browsers

- Microsoft Internet Explorer 6.0, 7.0
- Firefox 2.0
- Netscape 7.2.1

Supported Client Software (must follow supported operating system requirements)

- Microsoft Excel 9 (Office 2000)
- Microsoft Excel 10 (Office XP)
- Microsoft Excel 11 (Office 2003)
- Microsoft Excel 12 (Office 2007)

Supported operating systems

- Windows 2000 Professional, SP4 and higher
- Windows 2000 Server, SP4 and higher

- Windows XP SP2a and higher
- Windows 2003 Standard Edition SP2

Note: If you are using Windows 2003, MDAC 2.8 is required.

Hardware

Standard User:

Client machines need to follow the supported operating system matrix and supported Microsoft Office versions

DCOM must be enabled on the client

Admin User:

Pentium III 800 MHz or better, 256 MB Ram

DCOM must be enabled on the client

Bandwidth

Dial-up access to Financial Management requires at least 56k bandwidth. For certain operations, specifically spreadsheet functionality a wider bandwidth may be necessary.

The Application Server Tier

The Financial Management Middle-Tier application server is the piece with the heaviest requirements for both Hardware and Software. All processing and Business rules are performed on this level. As user concurrency increases, the requirements for this level increases. The increases may be for more RAM, faster processors, more processors, or additional middle-tier servers. Depending on what activities are being processed, or on application size, each piece may be scaled independently.

Application Server:

	Minimal Application Server	Web/ Reports Server	Full Production Application Server
CPU	2 PIII Pentium	4 PIII Pentium	4 PIII Pentium
RAM	2 GB	2 GB	2 GB+
MDAC	2.7.1 2.8 for 2003	NA	2.7.1 2.8 for 2003
IIS	NA	5.0 on Win 2000 6.0 on Win 2003 5.0 on Win 2003 in Isolation Mode	NA
RDBMS Driver	Same version as RDBMS Server	NA	Same version as RDBMS Server

	Minimal Application Server	Web/ Reports Server	Full Production Application Server
Windows Server	Windows 2000 Server SP4 and higher Windows 2003 SP2	Windows 2000 Server SP4 and higher Windows 2003 SP2	Windows 2000 Server SP4 and higher Windows 2003 SP2

The Database Tier

Financial Management uses the Relational database as a storage container for all its data. There is no processing that occurs on this tier that is related to the business rules of Financial Management. This enables Financial Management to be somewhat generic in connectivity to the RDBMS.

RDBMS vendors and versions:

Database	Version	Platform
Oracle	9i - 9.2.0.2 and higher 10g – 10.1.0.2	Windows 2000 SP4 and Higher, Windows 2003 SP2 and Higher, Sun Solaris9, 10, HP-UX 11.1
MS SQL Server	SQL 2000 SP3a SQL 2000 SP4 SQL 2005	Windows 2000 SP4 and Higher, Windows 2003 SP2 and Higher
DB2	8.1 FP7a and higher 8.2 FP2 and higher	Windows 2000 SP4 and Higher, Windows 2003 SP2 and Higher, AIX 5.2 / 5.3 8.1 FP10 and 8.2 FP3 are required if using an application with double byte characters.

Note: The RDBMS driver can be Oracle 9.2.0.2, or SQL Server driver in MDAC 2.7.1. Shared Services Database requires SQL Server 2000 SP3a or higher.

Compatibility Matrix

Hyperion Reports™	7.2.1.6
Hyperion Analyzer™	7.2.1
Hyperion System 9 BI+™ Financial Reporting™	9.2 & 9.0.1
Hyperion System 9 BI+ Web Analysis™	9.2 & 9.0.1
Hyperion System 9 Shared Services™	9.2.1
Hyperion Planning™	4.0.1
Hyperion System 9 Planning™	9.2 & 4.1.1
Hyperion System 9 Application Builder J2EE™	9.2 & 9.0.1
Hyperion System 9 Strategic Finance™	9.2

Hyperion System 9 Master Data Management Services™	9.0.1
Hyperion Application Link™	7.0.7 & 3.0.7

Defects Fixed in this Release

Defect Number	Details
8-603953661	Loading an invalid Web Form causes application instability
8-606505891	Unable to lock a parent entity if an inactive child has a CN status in a prior period
8-623778063	Randomize the generation of the ASP Session ID used in file/folder location on Web
8-623778097	Smart View menu is improperly surfaced
8-613581154	POV selector functions for Period do not support Dynamic calculations +/-
8-631639840	Memory optimization for process control tasks
8-646549441	Menu selector does not properly display within the copy data module
8-566823181	Loading an account with a percent sign (%) in the name doubles the percent sign
8-659063315	Certain financial reports take longer to execute versus prior releases

Documentation Updates

References to Hyperion Download Center may still exist in the documentation. Hyperion products and documentation are now available on the [Oracle Technology Network](#) or the Oracle® [E-Delivery](#) site.

Installation Guide

Disregard any references to the *Hyperion Business Performance Management Deployment Guide* in the Installation Guide. The *Hyperion Business Performance Management Deployment Guide* does not support this release of Financial Management.

Character Support in Database Names

When using Hyperion Configuration Utility to configure a database, for the database name, you can enter only English alphanumeric characters and the dash character (-).

Financial Management Administrator's Guide, SetDataWithPOV Function

The *Financial Management Administrator's Guide* incorrectly states that you can use the SetDataWithPOV function with Consolidation rules. You can only use this function with Calculation or Translation rules.

Shared Services Addendum

All documentation for new features, enhancements, and fixed defects for System 9 security and user provisioning is contained in the *Shared Services Documentation Addendum*.

Financial Management Addendum

Documentation for Process Management enhancements is contained in the *Financial Management Addendum* provided with the Financial Management Installation Documentation zip.

Issue with Displaying Windows Help Files on Windows Vista

Windows Vista does not include support for Windows Help (.hlp files using the WinHlp32.exe file).

The Financial Management Administrator's Help and User's Help files display correctly on Windows Vista. However, the following Financial Management help file is distributed in Windows Help format: Financial Management Desktop Help: hfm_desktop.hlp.

If you plan to install Windows Help files on a Windows Vista computer, you can follow the instructions in the article from the Microsoft Knowledge Base entitled: "The Windows Help (WinHlp32.exe) program is no longer included with Windows operating systems starting with Windows Vista." The article can currently be found at: <http://support.microsoft.com/kb/917607/en-us>. The instructions on the Microsoft page allow you to enable limited support for files in the Windows Help format.

Oracle neither recommends nor opposes the solution from Microsoft. You should carefully evaluate the Microsoft solution and determine if it is appropriate for your site.

The content from the Desktop help file is also available in these pdfs: *Financial Management Administrator's Guide* and *Financial Management User's Guide*.



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